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CCW PR24 Objectives

Yonder debrief – May 2022

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Executive Summary

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Key findings



- Consumers generally have low interest in water and even less knowledge and understanding of water operations
 - Awareness and understanding of both the role of a regulator and of consumer champion is low. Very few consumers had heard of CCW and Ofwat and the roles and responsibilities of regulator, consumer champion and water company are hard to distinguish.
 - Consumers were happy to hear their interests were represented by CCW and felt a high level of trust in their expertise and work. There is a clear expectation for CCW to demonstrate they are doing the best for customers and representing their best interests, particularly on bill prices.
 - The principle of a price review and the importance of reviewing spending and investment is understood and well received. However, the current rises in cost can lead to questions over whether if the price of water goes up the price review will be used as a means of justification increases.
- Overall, CCW objectives are appropriate and acceptable to customers. The objective areas were spontaneously important to water customers.
 - However, because these areas are already important, more detail or transparency in the objectives and their intended outcomes would be required to raise the bar to increase the impact on customers. These need to fuse a need for informing and specificity into the objectives.

Objectives review

Affordability

- This is the most specific and consumer-relevant objective, and the best received.
- It contains several measures that feel immediately relevant and impactful and are in line with consumer expectations of CCW.
- It could be strengthened by protecting consumers (particularly the vulnerable) and calling for more sharing of best practice.

Climate resilience

- This was the objective consumers struggled to provide feedback on the most as it was the most technical and complex.
- There is an opportunity for CCW to push water companies to inform consumers on climate resilience matters in an accessible way before engaging with them on intended measures.

Environmental risk

- There is strong support and a sense of urgency on environmental issues.
- Participants want water companies to make changes, but the practicalities are beyond their scope of knowledge.
- CCW could push water companies to increase their customer-facing activities which inform customers about environmental issues, as well as promoting CCW's initiatives more widely.

Objectives review

Good water and sewerage services

- This objective is hard for consumers to generate responses to. Participants struggle to think beyond ensuring they have running water.
- CCW could push water companies to inform customers more and ensure that water companies are transparent in how they are performing.

Customer focus and customer research

- Customer research is not a key area of priority for customers – understanding of the value and purpose is limited.
- CCW could highlight the issues of transparency and accountability of water companies which are important to customers
- CCW could set standards of best practice in terms of research and how best to communicate findings from the research to customers.

Good value for money

- Whilst being a key area for consumers it is hard to determine whether they receive it or not.
- CCW could push water companies to ensure that information is provided in an easily understood manner using information which is directly relatable to them.

Recommendations



CCW should work to separate their responsibilities from Ofwat's in the public eye. To build engagement CCW should enhance their objectives with the approach and evidence bases befitting a consumer champion.

1

PUSH WATER COMPANIES HARDER

Customers want CCW to be bold in defending customer interests and holding water companies to account.

2

BE LOUD AND PROUD

Promoting CCW's past and current work, and sharing successes, to encourage support from the public, as well as raise CCW's profile.

3

DEMONSTRATE IMPACT

Demonstrate the impact of past work, as well as the potential impact of desired outcomes from the objective.

4

INFORM AND RAISE AWARENESS

Customers need to be brought onboard by increasing awareness, which will help them understand what CCW are trying to achieve.



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Introduction



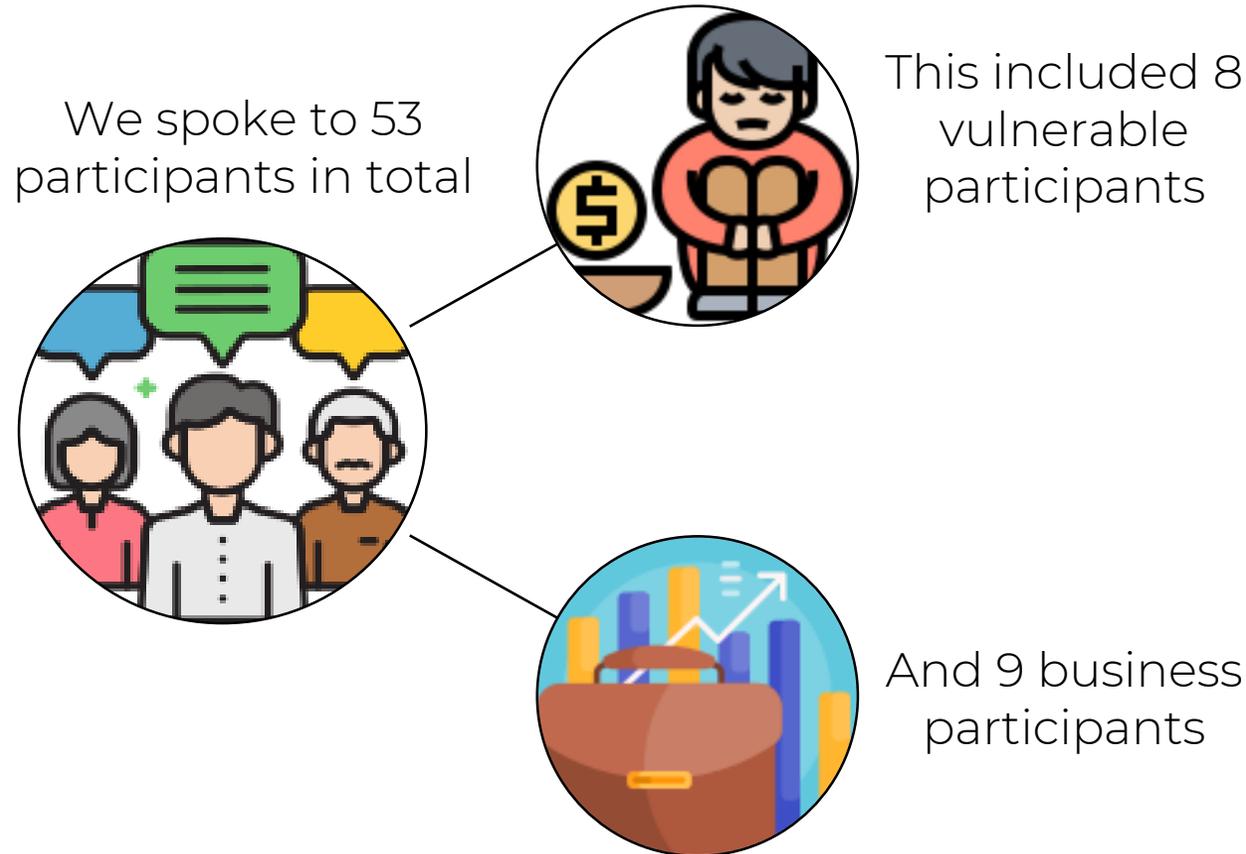
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Background to the research and research objectives



- CCW's objectives for the 2024 Price Review will be published in May 2022. What CCW is looking to achieve and why will be transparent to stakeholders and customers.
- The objectives should also demonstrate where CCW aims to add value to the price review process, outside of Ofwat's power to set price controls.
- As the customer representative, CCW want to ensure that their objectives have customer support, including making amends to reflect customer expectations.
- The research aimed to understand customer views on CCW's PR24 objectives:
 - Do they understand the objectives?
 - Do they understand what is being measured and why?
 - Are there any they agree / don't agree with?
 - Are they ambitious enough?
 - Is there anything missing?

Sample and methodology



- Participants were recruited from across England (36) and Wales (17)
- General population sessions were conducted in groups
- Businesses and vulnerable participants were conducted in triads
- All were conducted over Zoom
- Fieldwork was conducted between 12th and 21st April

Research approach

Build participant understanding

Pre-task: Participants explored three types of websites – their water company website & bill, Ofwat's website and customer representative websites (Citizens Advice and CCW)

Focus group: The first part of the group allowed participants to share their experiences of the water industry, and explore how CCW's work fits into the wider water context

AIM: Set expectations for participants so they understand CCW's remit

Explore unprompted thoughts

The groups explored what participants expect from CCW, and what they thought could be improved on in each of the outlined areas. We then explored ways that CCW could influence this change.

AIM: Identify participant priorities and unbiased wants

Evaluate objectives against expectations

Objectives were presented to the group to explore questions and reflections. The groups then identified whether the level of CCW's objectives is what participants expected.

AIM: Explore participant understanding and feelings around the proposed objectives

Research materials

During the sessions participants were shown pre-prepared stimuli developed by Yonder in conjunction with CCW. Stimulus A presented a range of scenarios and participants were asked to assign them to which organisation they felt would have responsibility for it. Stimulus B is CCW’s objectives.

Stimulus A

Your water company	CCW (Consumer Council for Water)
Ofwat	<p>Your local water treatment works have been releasing sewage into a nearby stream</p> <p>Your water has been cut off with no warning because there's a water leak further up the road</p> <p>You've been overcharged on your water bill and your water company isn't responding to you even though it's been 2 weeks</p> <p>Monitoring leakage levels across your local area</p> <p>Your water company made some repairs and damaged the road and you need to complain</p> <p>You want to find out how well your water company is performing compared to other water companies in the UK</p> <p>You've recently lost your job and you are now struggling to afford your water bill and need support</p> <p>Setting price controls which impact your bill</p> <p>You want to know if you would save money by getting a water meter</p> <p>You want to get a water meter installed at your home so you can save money on your water bill</p> <p>Your water company is planning on doing some major works (expanding a reservoir) near your home which you feel will impact your life</p>

Stimulus B

Addressing environmental issues and risks



- 1 CCW want water companies to show that their environmental strategies are ambitious and informed by research with customers:
 - Companies need to show how and when they'll meet industry targets for 2025-2030
 - If companies want to go above and beyond, they need to show that their customers are in favour of this (including paying more if that is needed to achieve this)
- 2 Ask water companies to show how their business plans will increase public awareness of water and encourage people to value their water and save water

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Context and general findings

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Consumers have little interest in water

- To everyday consumers, water services consist of **turning on the tap**
- It is hard to think beyond this and people struggle to think of **other services** a water company might provide
- Water consumers recognise they have **no choice** over who their provider is, unlike other utilities. They therefore feel very disempowered as consumers – they have no right to switch or leave their provider
- This can lead to feelings of apathy and disinterest with water services



"It's always there, we've never had a problem."

– Participant, England

However, despite these feelings of apathy, consumers tended to have largely positive views of their water provider

- There feels to be **more trust in water companies**, with less concern around high bills and 'fat cats' putting profits before customers than with other utility providers
- Participants feel that water companies are probably doing their best for their customers
- This is supported by largely **positive interactions** with water companies on the rare occasions they had to make contact
- However, consumers recognise that they have a knowledge gap when it comes to the 'non-visible' aspects of water provision (treatment / environment, infrastructure etc.)'

"I think Welsh Water is good value for money. Very good value for money" – Participant, Wales

I think water is the easiest utility to use out of all the utilities that we use, I think they're the easiest to speak to and get through to as well."
– Participant, England

Awareness of CCW and Ofwat is extremely low



- Within our sample, **awareness of consumer champions** and their role is **low**
- Whilst there is familiarity with household names (Martin Lewis, Citizen's Advice Bureau), **the role and responsibilities** of consumer champions is **very limited**
- Awareness of CCW is extremely low – a **consumer champion focused on water is surprising**
- Those who had poor experiences with their water supplier feel they could have benefitted from CCW's guidance

- Awareness of Ofwat is also extremely low – although some were aware of Ofwat due to the recent sewer overflow news
- Assumed that there would be some kind of regulatory body involved but awareness of Ofwat as that body is very limited

"I didn't realise Ofwat existed to regulate the different companies. It makes sense but I never thought that something like that would exist."

- Participant, England

Despite low awareness of CCW, consumers are happy to hear their interests are represented

- Consumers were happy to hear that they have a dedicated body, in CCW, where they could reach out if they need to
- **Trust** in CCW's **experience and expertise** in the water sector is implicit
- Given the extent of CCW's role and influence consumers are **surprised not to have not heard** of an organisation with so much responsibility – even though its powers are limited
- The cost of CCW at 22p/year feels like **a good deal**. However, there can be **confusion** over CCW's role as a government/private body and **where their priorities lie**



"I've never heard of CCW. I would've gone to them with the problems I had." –Vulnerable participant, Wales

However, participants struggled to distinguish CCW and Ofwat's roles



- The first port of call for water issues will likely always be their **water company** – to try and resolve directly **at the source**
- If they are unable to progress, they anticipate possibly reverting to Ofwat. This is due to Ofwat having **greater salience**
- There is a **lack of clarity** over the circumstances / what the need would be in order to contact CCW as a consumer champion
- CCW could potentially benefit from **raising awareness and informing consumers** on when/how CCW has a role to play and when to contact them (as opposed to a water company / Ofwat)

"I get now that Ofwat is the big bad regulator with the legal powers, CCW is able to do the nagging in the middle." – Participant, England

"I think my first port of call would be to contact the water provider and if they couldn't help I would get the big boys like Ofwat on them"
– Vulnerable Participant, England

Responses to the price review are influenced by external factors – such as the current cost of living rises

- The principle of a price review and the importance of reviewing spending and investment is **understood** and **well received**. Consumers **appreciate** how closely regulated water companies are and that this is a tangible example of that regulation
- However, the fixed time limit of a review every five years can be a **point of frustration**
 - Not seen to take into account how much everything can change in 5 years – Covid for example
- The **current rises in cost of living** are also impactful and can lead to **cynicism** over what impact the price review will have
- Questions arise over whether if the price of water goes up the price review will be used as a means of justification

It's positive to know from a consumer perspective there is a level of fairness in the playing field. You take water for granted and there are some families who can't afford it. It's good that it makes sure you are getting a service worth paying for.
– Participant, England

"Instead of every 5 years why don't they reduce it? Gas and electric is always changing. Do it every 2 years. Everything's changing so quickly."
– Participant, Wales

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Objective deep dive

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Audiences consistently wanted CCW to prioritise the same things



GENERAL PUBLIC

- Want **low bills** for good quality of water and customer service
- Depending on personal experience and preference, can want greater focus on environmental issues and associated factors (e.g. flooding)



BUSINESSES

- **Low bills** and reliable water related to what their business purposes is
- If water is essential to their business, they want fair prices reflective of their individual usage and need (rather than a costly fixed rate)



VULNERABLE CUSTOMERS

- **Low bills** and **protection** against price increases are their top priorities
- Supporting vulnerable customers by recognising how **fluid** vulnerability can be and ensuring communications are **sensitive** and **accessible**

CCW is expected to be both a loud consumer champion and to act as a bridge between water companies and customers

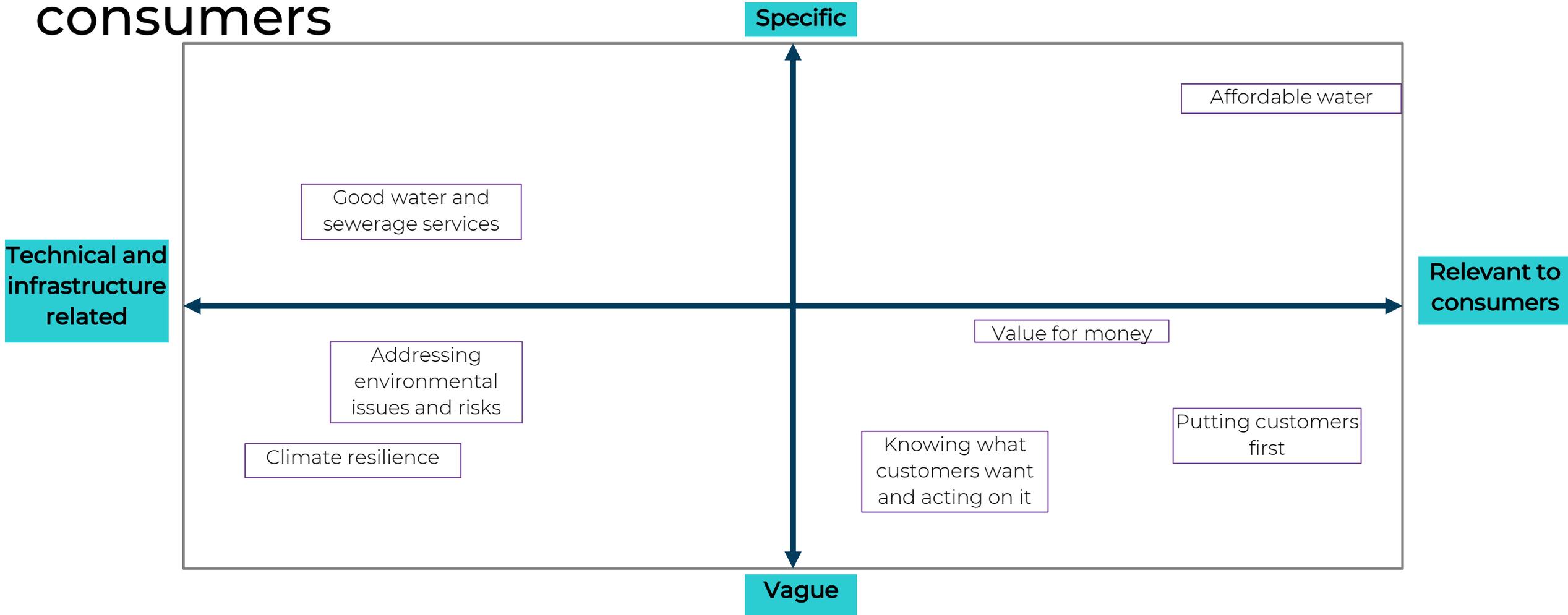
+There are **expectations** about how CCW's objectives should demonstrate they are doing the best for consumers through activities such as:

- Encouraging and sharing best practice
 - Campaigning for better services
 - Protecting vulnerable consumers
 - Informing consumers on cost saving measures
 - Pushing water companies for greater transparency over operations
- Within the context of these expectations, CCW's objectives seem sensible and realistic

As consumer champions there are high expectations that CCW will make the objectives **relative** and **engaging** for consumers

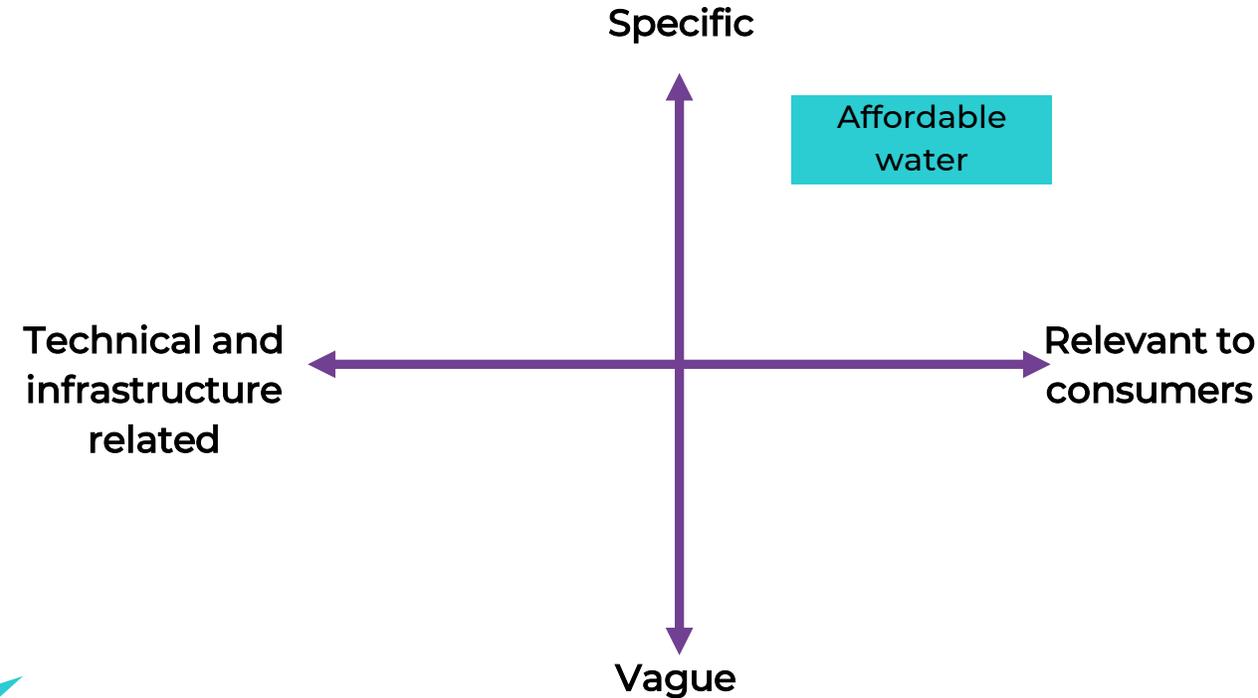
- The objectives need to address consumers' lack of understanding by pushing companies to be more transparent, more proactive and more accessible
- Consumers need to feel that they understand the purpose of the objectives and their impact
- The objectives must also address this knowledge gap in order to be effective

For the objectives to land effectively, they should feel both relevant and specific to consumers



Affordability is consistently seen as being a top priority for participants across the sample

- Anticipated to **only increase** in importance as cost of living increases and potentially **more households** become financially vulnerable
- Participants see this as an area which CCW has a **significant role** to play
- They assume that CCW are already having an impact but this could be **publicised more** so that more households are aware that support is out there
- Expectations are quite high that CCW will **fight on behalf** of consumers to guarantee affordable water for everyone



"Affordable water for me is the most important thing because I'm finding it very hard to afford things at the moment."

– Vulnerable participant, Wales

The objective is well received but could be strengthened by protecting consumers and sharing best practice

What is working well

- Participants are **positive** about the outlined objectives and the focus on vulnerable audiences
- Having **greater control** over how they pay their bills is particularly well received – having options for paying could be beneficial for those with variable incomes
- The intended support for vulnerable consumers is seen to be comprehensive and important to prioritise

What could be improved?

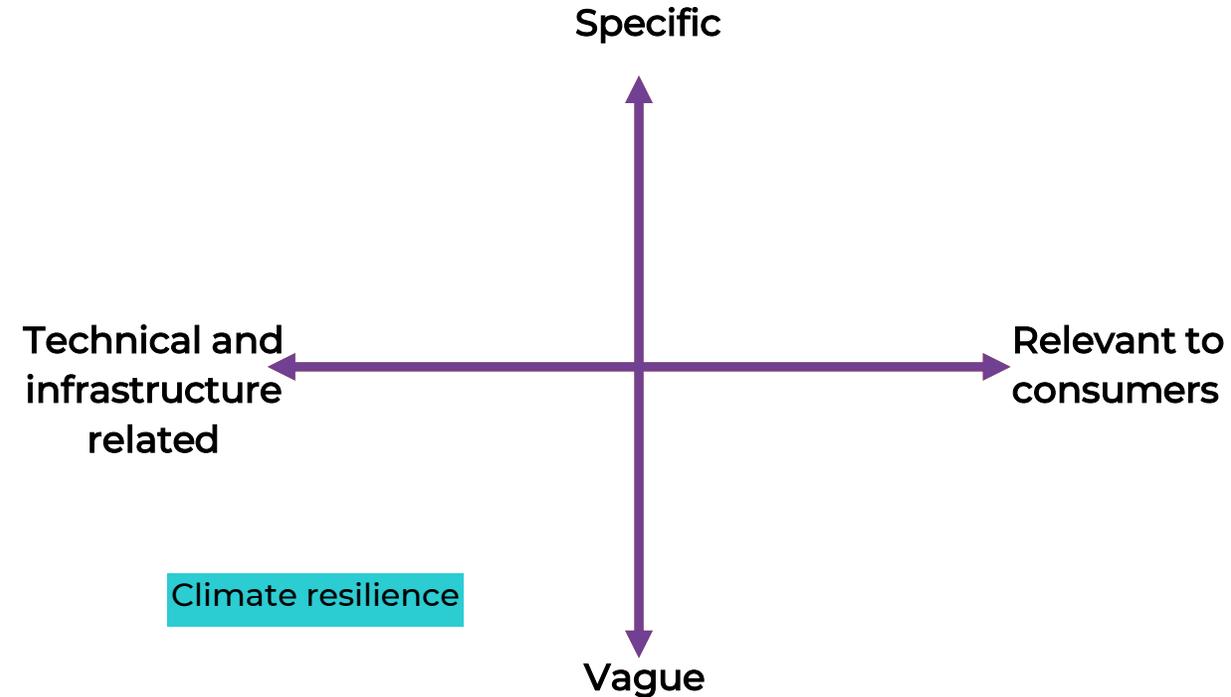
- There are questions over how a social tariff would work – could it be claimed repeatedly if someone moved house for example?
- There are **concerns** about whether support for vulnerable consumers could come at the **expense of others** – resulting in more consumers being considered vulnerable
- Greater clarity on protection for all consumers could be beneficial

Where could the objectives go further?

- There are suggestions that other services and utilities could be a valuable source of **best practice/learning** for water companies
- The idea of a **CCW ‘end water poverty’ campaign (see [here](#))** is well received. More CCW publicity could help with water affordability and to **futureproof** these objectives even more

Climate resilience is the objective participants struggled to provide feedback on the most

- Spontaneous responses to this objective are **limited**
- This objective feels the most technical and vague to participants – it relates to **infrastructure issues** which they have little to contribute to
- The kinds of measures which water companies would take to address climate change feel **too technical and complex** for consumers to engage with
- However, there is an opportunity for CCW to **inform consumers** on these risks, and provide support for those at risk of the impacts of climate change



CCW could push water companies to address the lack of consumer understanding in climate resilience



What is working well

- Climate change is recognised as a **serious priority**
- Participants feel **reassured** that CCW are **representing** their best interests

What could be improved?

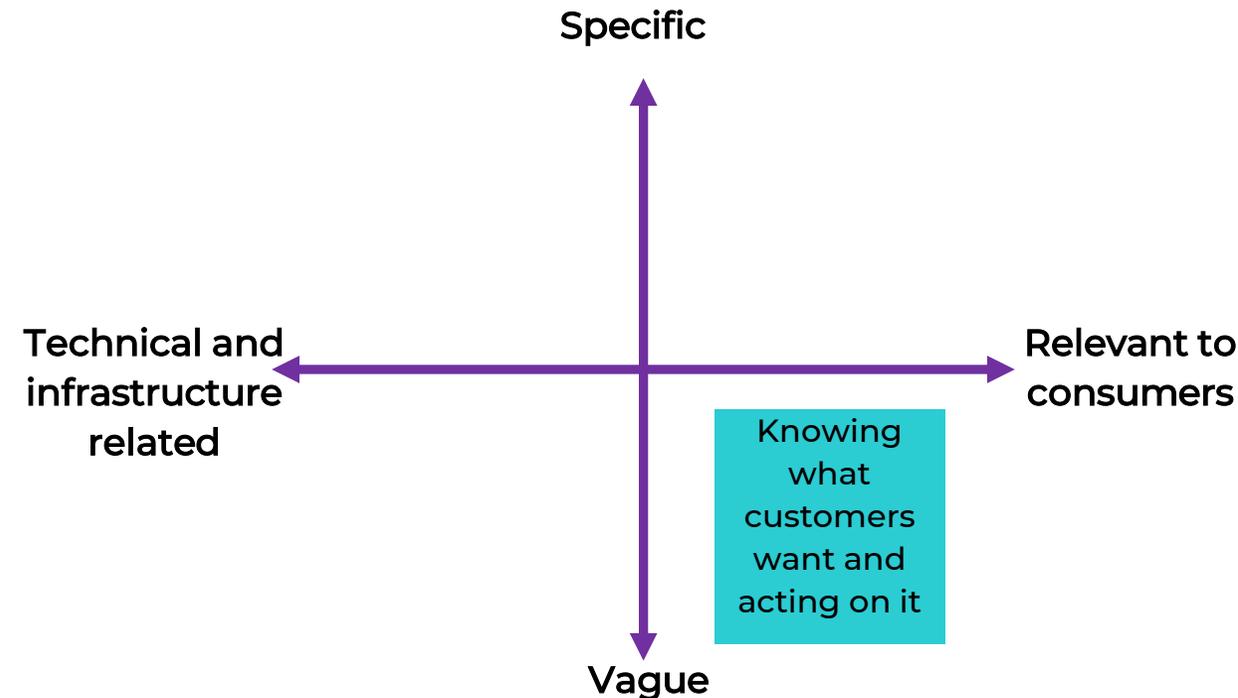
- There is an **expectation** that these objectives are already being actioned
- It is a hard topic for consumers to **connect** with and to **understand**
- This objective feels far removed from consumer needs. **Clarity is needed** over what the **impact** on the consumer might be
- Clarity over what is deemed as 'affordable' is raised by vulnerable participants

Where could the objectives go further?

- Questions are raised over what the impact on customers would be as a result of these measures
- A role for CCW could be to keep **consumers informed** of what their water companies are doing with a **strong focus on affordability**

Knowing what customers want and acting on it is seen as a 'nice to have', but currently a little vague

- Customer research is **not a key area** of priority for most participants
- There are concerns that water companies would use research as a **rubber stamp on their work**, instead of delivering high quality insight
- Unprompted thoughts mainly surround wanting to feel **included and asked** – and needing to know that they are **listened to** on topics that are relevant



"I just want good water. I don't even know what I want." – Participant, England

To strengthen this objective, CCW could push for **transparency and accountability** from water companies

What is working well

- **Increased opportunities to communicate** with their water company are well received – particularly if they were likely to be affected e.g. by engineering works / digging up roads
- Recognising there may be **customer demand to understand how their bills change** is appreciated

What could be improved?

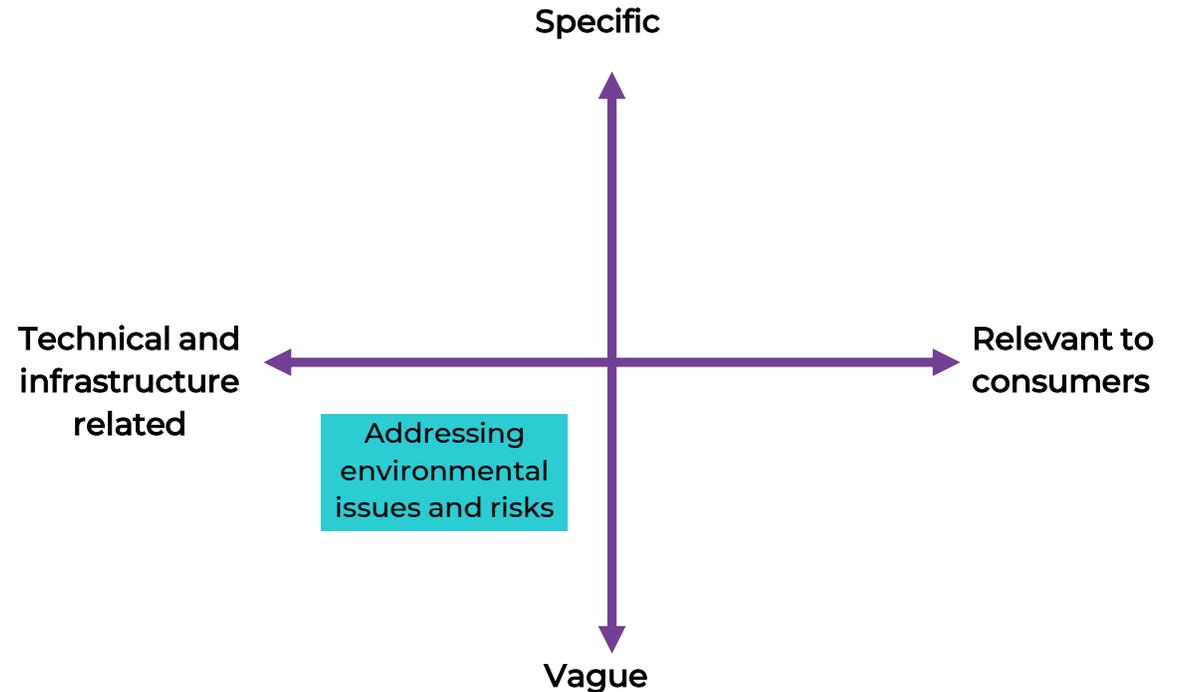
- Participants want **reassurance** that any research that is carried out would be robust, unbiased and of good quality
- There are some concerns around cost, and whether this is something that bill payers should be funding
- CCW could explain why research is important. **Justifying** the investment and value could **increase consumer engagement**

Where could the objectives go further?

- The objective is seen as being rather **unambitious** – participants expect this to be happening anyway
- CCW could go further and highlight the issues of **transparency** and **accountability** that were important to customers
- CCW could put in place **standards of best practice** in terms of research and how best to communicate the findings from the research to customers

There is general support for addressing environmental risks as a wider societal issue

- There is **strong support** and a sense of **urgency** on this objective, which sometimes came up spontaneously in discussion
- Participants are aware of environmental issues and want water companies to step in and make a change
- However, the detail of how this could work in practice is complicated for participants and **beyond their scope** of knowledge and understanding



“The environment is so important. If we don't future-proof stuff then in 5-10 years, we could be really suffering. I think future-proofing services is really, really important” – Participant, Wales

There is demand for this objective to be ambitious and for CCW to support in informing and engaging customers

What is working well

- Participants feel that water companies should be **ambitious** on climate change whilst **keeping bills** in mind
- There is strong support for water companies working to raise awareness of water saving, and this feels like something CCW could realistically work on

What could be improved?

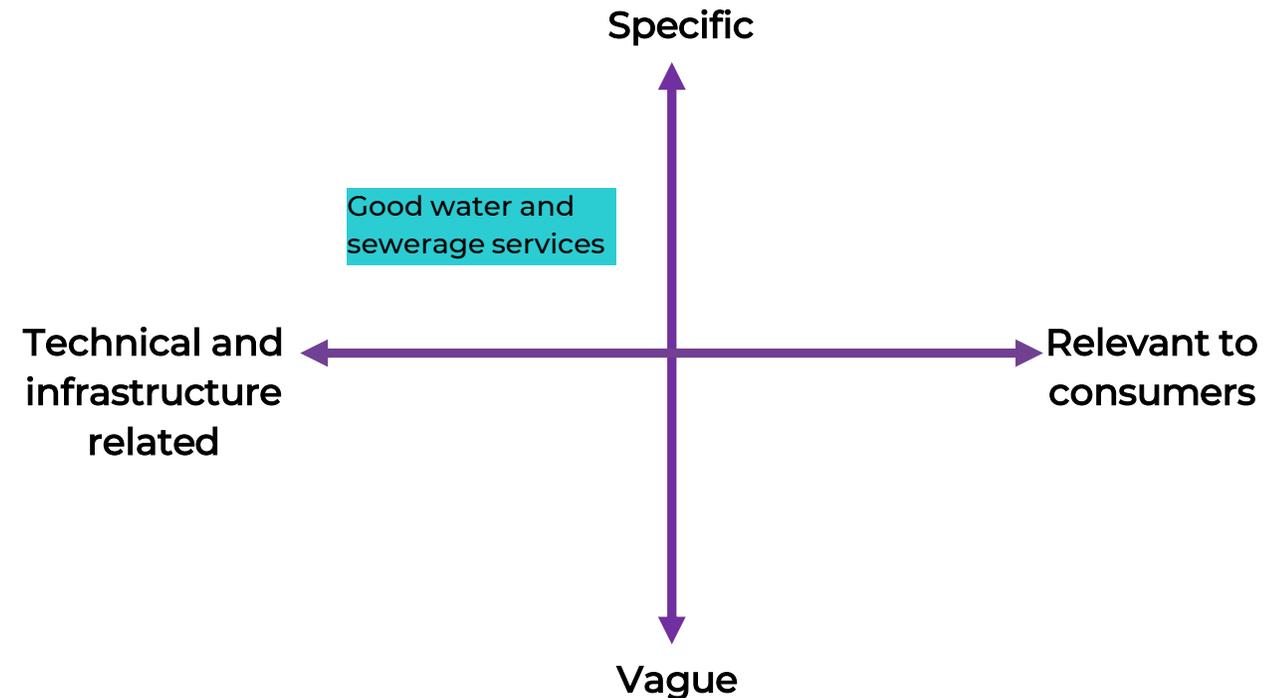
- Participants want water companies to be **ambitious** but struggled to picture what this **would look like practically**
- Participants are unaware of any industry targets so struggle to articulate what this would look like
- The objectives could **offer greater reassurance** that customer protection will be the top priority. CCW could set out what they would expect companies to show to **prove** their customers are in favour of going above and beyond targets

Where could the objectives go further?

- Many feel that CCW could deliver more **customer-facing activities** in this space, or push water companies on a wider range of goals in this space such as:
 - Informing on and increasing awareness of water
 - Encouraging the use of water meters and water saving devices
 - Pushing water companies to show their progress and share positive stories

Good water and sewerage is a basic right – participants struggle to think beyond ensuring they have running water

- Due to **low engagement** with water services this objective is **hard for participants** to generate responses to
- It is challenging for participants to spontaneously think about the role CCW could have in this area
- The technical aspects of the objective are hard to assess **without more detailed information** – for example what would be measured beyond basic service delivery
- Natural gravitation is towards ensuring clean water which led to some confusion over whether this would actually be Ofwat's responsibility



CCW are a trusted voice to represent consumer interests but there is appetite to include customers more

What is working well

- The objectives focus on areas which **matter to customers** – both broadly (good water and sewerage services are essential) but also at a more granular level (leaks / flooding / complaints)
- CCW's campaign to **not let people suffer in silence** (see [here](#)) is well received – could also help to raise CCW's profile
- CCW's role in representing customers and dealing with technical details is reassuring and well received

What could be improved?

- Felt there could be greater scope to **inform** consumers on the practicalities of good water and sewerage
- Suggestions included **accessible videos** on water treatment
- This could link back to **environmental issues** (reassurance of tap water drinkability could result in less plastic)

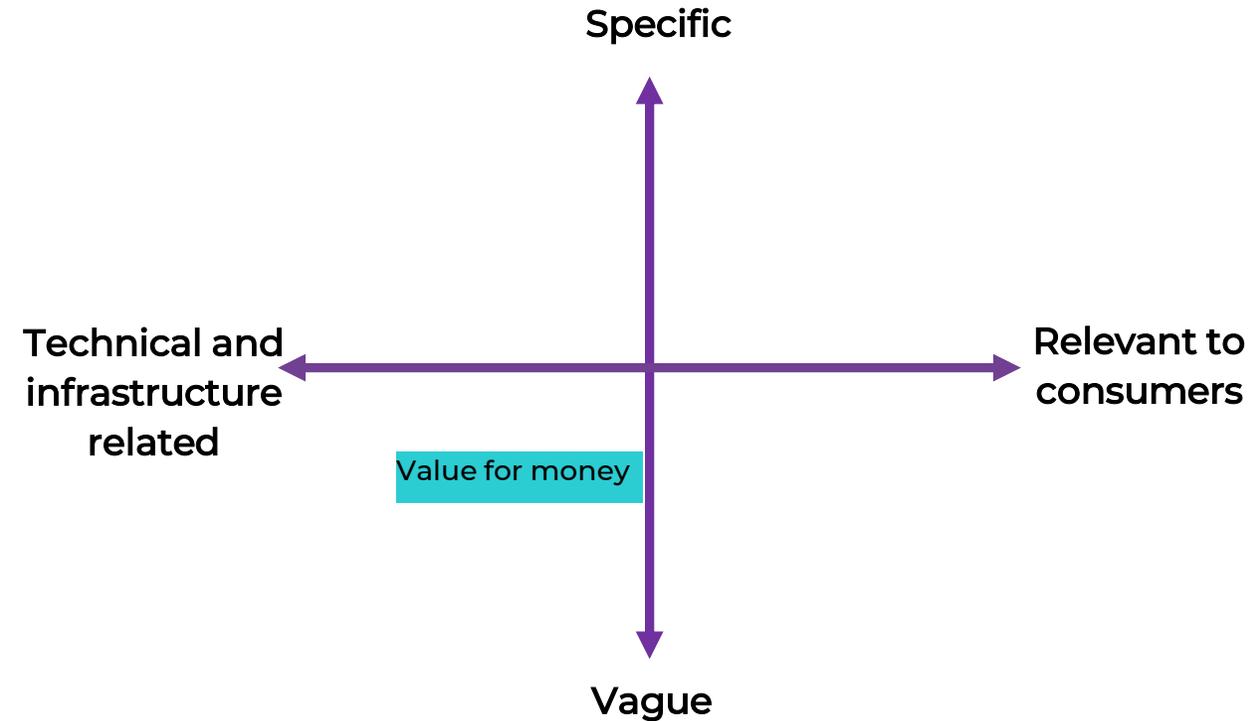
Where could the objectives go further?

- Could push for greater sharing of **best practice** amongst water companies to support customers who receive poor service
- Participants wanted CCW to support efforts to make water company's performance more **transparent**

Value for money is seen as a key area for participants and something which most are currently getting

- Participants understood this objective but struggled to elaborate on what water companies **might spend their money on**
- Most participants feel they receive **fairly good value for money** from their water company
- This feels like an area which would be more closely governed by Ofwat than CCW, so participants can struggle to see **how CCW could realistically impact this**

*"Like companies say they have good value for money but is it? As I have no idea what these companies spend the money on that we pay for."
– Business participant, England*



A role for CCW could be in informing customers on how value for money is determined in water terms

What is working well

- It is challenging for participants to articulate what they would **determine as value for money** – but they were appreciative of **CCW making that judgement on their behalf**

What could be improved?

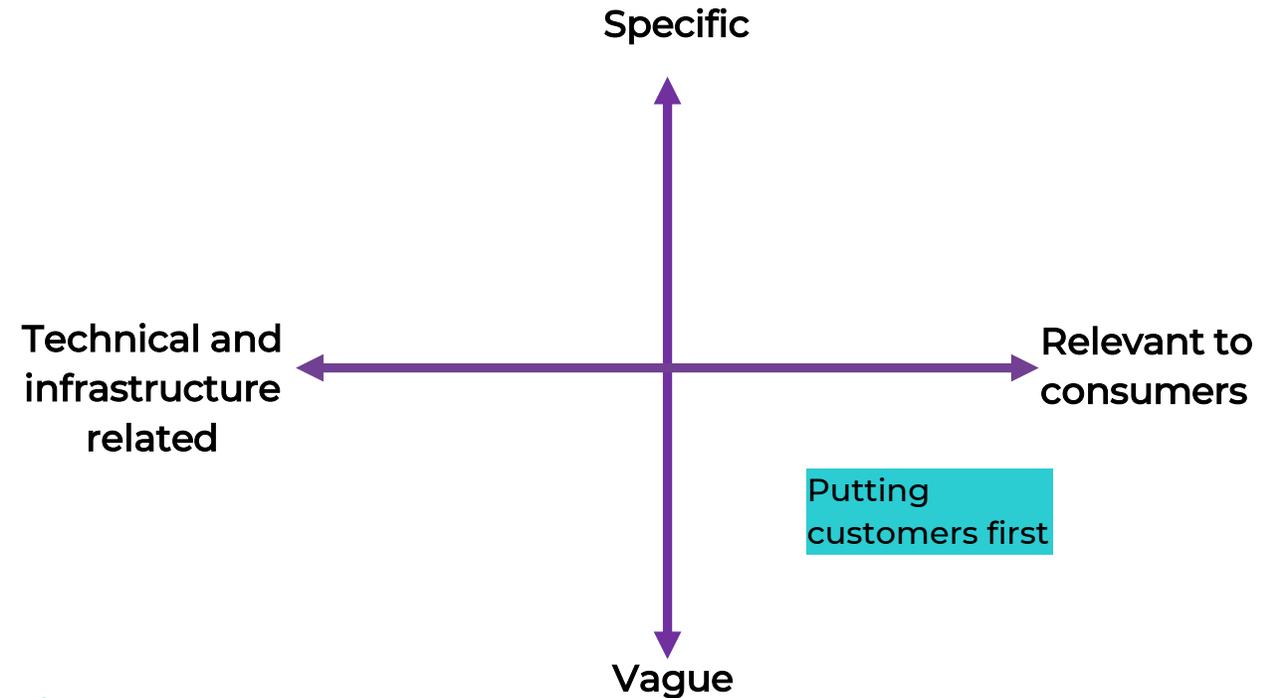
- There could be a role for CCW in **translating** what the proposals could mean for customers
- Ensuring companies costs are efficient is felt to be a **vague determination**, although they trusted Ofwat to monitor this

Where could the objectives go further?

- CCW could ask water companies to evidence their proposed work with examples as to how this will **impact the local area**
- Customer buy-in can be increased if customers can **relate and understand** to the work being done and if it is shown to **impact them directly**

Companies putting customers first is seen as a key principle but is hard to picture in practice

- This was warmly received as an objective and **easy to understand** from the angle of customer service
- Participants mainly want to feel like they're **being respected and heard** – but aren't entirely sure how this can be done
- Participants struggled to understand what a customer-focused culture might look like in the context of a water company – and had few suggestions on how this could be done



"It's about them understanding individuality, if someone's elderly, disabled or anything like that ... companies need to work for different people's needs" – Participant, England

CCW as the customer champion is well received



What is working well

- Participants agreed that water companies should be **measured on their performances** when it came to customer focus
- There is strong support for fining water companies on these objectives

What could be improved?

- Participants weren't interested in the 'how' – they just wanted to know this is happening
- Measurement of the objective could be strengthened through **guidelines and targets to be set by CCW** to ensure that a certain **standard of service** is met across the country

Where could the objectives go further?

- Participants felt there could be **measures included** on number of complaints / time taken to resolve etc
- Vulnerable participants suggested CCW push for water companies to be **proactive** in checking whether water needs and circumstances have changed



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Reflections and conclusions

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Summary of findings

- 1 Overall consumers are disengaged with their water services. Their top priorities relate to affordable bills in exchange for clean, reliable water. Given the cost of living increases the importance of affordability has only increased.
- 2 However, there are expectations that water companies are doing their best and there is growing interest in ensuring measures to prevent and limit the impact of climate change are prioritised.
- 3 Awareness and understanding of CCW is very low. However, there is appreciation that a consumer champion for water exists. Currently that role is presumptively assigned by participants to Ofwat or to water companies.
- 4 When readily presented, participants are impressed by CCW's work and initiatives, which feel very relevant to customers. Further communication about these initiatives would increase customer engagement with CCW.

Summary of findings

5 Overall, CCW objectives are appropriate and acceptable to customers. The objective areas were spontaneously important to water customers.

6 However, because these areas are already important, more detail or transparency in the objectives and their intended outcomes would be required to raise the bar to increase the impact on customers. These need to fuse a need for informing and specificity into the objectives.

Key actions for each objective to improve



Affordability: This was the most specific and consumer-relevant objective, and is very well received. Whilst it could be strengthened by protecting consumers and sharing best practice, it contains several measures that feel immediately relevant and impactful



Climate resilience: CCW can push water companies to inform consumers on climate resilience matters in an accessible way before engaging with them on intended measures, which are currently vague for most customers



Environmental risk: CCW can push water companies to increase their customer-facing activities on informing customers about environmental issues, as well as promote their own initiatives more widely

Key actions for each objective to improve



Good water and sewerage services: While this objective feels quite purposeful, it jars with people's perception of CCW's role – other than supporting customers with bad service. Better reflection of customer needs would involve more informing and ensuring that water companies are transparent in how they are performing.



Customer-focus and customer research: Although customers are happy to know this is happening, the objectives need to be more far-reaching to reflect customer needs (i.e. build out objectives to include greater context on measures and incentives)



Good value for money: Customers need more context to form opinions on value for money. This objective needs to ensure that information is provided to customers in an easily understood manner

How CCW can make their objectives more engaging for customers



1

PUSH WATER COMPANIES HARDER

Customers want CCW to be bold in defending customer interests and holding water companies to account.

2

BEING LOUD AND PROUD

Promoting CCW's past and current work, and sharing successes, to encourage support from the public, as well as raise CCW's profile.

3

DEMONSTRATE IMPACT

Demonstrate the impact of past work, as well as the potential impact of desired outcomes from the objective.

4

INCLUDE INFORMING AND AWARENESS RAISING

Customers need to be brought onboard by increasing awareness, which will help them understand what CCW are trying to achieve.

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Annex



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Participant demographics – general population groups

Nation	England	24
	Wales	12
Gender	Male	19
	Female	17
Life stage	Future bill payer	6
	Pre / young family	9
	Older Family	11
	Empty nester	10
Ethnicity	Asian & British Asian	6
	Black African & Caribbean	5
	White (British and other)	22
	Mixed & Other	3

Participant demographics – vulnerable and business groups

Nation	England	6
	Wales	2
Gender	Male	3
	Female	5
Life stage	Pre / young family	2
	Older Family	3
	Empty nester	
Ethnicity	Asian & British Asian	
	Black African & Caribbean	2
	White (British and other)	5
	Mixed & Other	1

Nation	England	6
	Wales	3
Gender	Male	4
	Female	5
Water essential	Water essential	6
	Water non-essential	3
Business size	1 to 10	6
	11 to 50	1
	51 to 100	1
	100+	1

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Llais defnyddwyr dŵr

Thank you

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