CCWATER

ANNUAL TRACKING SURVEY 2007/08

FINAL REPORT

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PREPARED FOR:	PREPARED BY:
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SUMMARY

BACKGROUND

Understanding the views and opinions of consumers is key to effectively delivering the business objectives of the Consumer Council for Water and for the organisation to continue to provide a strong consumer voice within the industry.

In 2006 CCWater undertook a baseline survey of consumer views. The 2007/08 FDS survey builds on the 2006 survey and tracks changes in the views of water consumers over the past year. Overall, results of the 2007/08 survey are very consistent with those in 2006 but some changes are evident. The key findings of the 2007/8 survey are summarised below.

VALUE FOR MONEY

- Most respondents (85%) agree that the bills they receive from their water and sewerage supplier are clear and understandable.
- Over seven in ten respondents (72%) say that they are satisfied with the value for money from the water services in their area.
- Results for value for money from sewerage services are slightly better than the results of satisfaction with water services, with 76% saying that they are satisfied.
- Consumers perceive their energy (gas/electric) charges and landline telephone charges to be better value for money than their water and sewerage charges, perhaps crucially because dissatisfied consumers can switch in these markets.
- The main reason that consumers are dissatisfied with the value for money from their water and/or sewerage supplier is because of issues relating to price (54%).
- Nearly a third (64%) agree that the water and sewerage charges that they pay are *fair*.
- Three quarters (76%) agree that the water and sewerage charges that they pay are *affordable*.
- If given the choice, nearly a quarter (24%) of respondents say that they would want to change their water and sewerage supplier and this figure varied by area, with more consumers wanting to switch in areas, especially the South West, where satisfaction with suppliers was low.
- As in 2006, consumers in the South West continue to be far less positive than others with regards to nearly all aspects relating to water and sewerage services, especially value for money, reflecting the higher prices paid by these consumers.

CONSUMER RIGHTS AND RESPONSIBILITIES

- Nearly all respondents (95%) are aware that they can pay by Direct Debit, 87% are aware that they can pay in instalments, and 86% are aware that they can talk to their water company if they have a problem paying their bill.

- Overall, 38% of respondents say that they have a water meter fitted and those who have a meter fitted are often single person households most likely to benefit from having a meter.

- Unmetered respondents are more aware than in 2006 that they can have a water meter fitted free of charge (61% this wave, up from 50% in 2006).

- The majority of respondents (87%) are not aware of the vulnerable groups tariff (76% say that they do not need to be on the tariff, but 11% say that they would like to know more).

- Seven in ten respondents (70%) are not aware of the services available for elderly and/or disabled consumers.

- Awareness that consumers may be entitled to compensation in the event of their water company providing poor service has increased (39% in 2006 to 44% in 2007/08).

- In 2007/08, 16% of respondents say that they had contacted their water company to make an enquiry in the past 12 months. Taking everything into account, 71% of respondents say that they are satisfied with the contact with their water company.

WATER ON TAP

- There are high levels of satisfaction for nearly all aspects of water supply. Consumers are most satisfied with the reliability of their water supply (97%), and least satisfied with the hardness/softness of their water (72%).

- Very few respondents (2%) think that their water service has got worse over the past year.

- Overall, 36% of respondents think that tap water is better for them, 21% think bottled water is better, and 41% think that they are equally as good for you. Therefore 79% think tap water is at least as good as bottled water and this proportion was higher still among older adults.

- Nearly all respondents (97%) agree that everyone needs to do what they can to reduce the waste of water.

- Just over half (54%) claim to have been made aware of campaigns to use water wisely in the past 12 months.

CLEANING UP

- 17% of respondents believe that it is acceptable to flush tampons, and 7% think it is acceptable to flush condoms down the toilet. However, nearly three quarters (73%) more correctly answered that none of a number of inappropriate items are acceptable to flush down the toilet.

- Four in five respondents (80%) were aware that their waste water was cleaned at treatment sites or went into a septic tank.

- Overall satisfaction with sewerage services has not changed since 2006, with a total of 88% saying that they are satisfied.

SPEAKING UP FOR WATER CONSUMERS

- The majority of respondents (78%) say that they would contact their water or sewerage company if they had a problem.

- Only one respondent spontaneously mentioned CCWater as the consumer body for the water industry. Nearly a quarter (23%) said without prompting that OFWAT was the consumer body for the water industry.

- When probed a further 18% of respondents said that had heard of CCWater before taking part in the survey. (The 2006 figure of 32% overestimated awareness).

- Nearly a quarter (23%) think that it is absolutely essential, 50% think it is very important, and 22% think that it is fairly important to have a consumer body representing their interests about the water and sewerage services they receive. Only 6% think that it is not at all/not very important.

- A total of eight respondents say that they had had reason to contact CCWater in the last year (this represents 0.4% of the total sample).

- Respondents' preferred source of information relating to their water and sewerage services is through inserts or leaflets with water and sewerage bills (25%), or on the internet (21%).

The full report contains detailed findings from the study including analysis by particular sub-group categories as relevant.

Stephen Link/Simon Driver
Director/Research Executive

February 2008

CONTENTS

1 INTRODUCTION

The Consumer Council for Water (CCWater) is the water industry watchdog, set up to represent consumers of water and sewerage companies in England and Wales and provide a strong national voice for consumers. CCWater operates through four committees in England and a committee for Wales.

Understanding the views and opinions of consumers is key to effectively delivering the business objectives of CCWater and for the organisation to continue to provide a strong consumer voice within the industry.

In order to be successful in its goals, CCWater needs to represent all water consumers and have an understanding of how consumers view water supply and sewage removal and treatment; the companies that provide these services; and the areas of policy / activity within the market.

In 2006 CCWater undertook a baseline survey of consumer views. In 2007 FDS International was commissioned to carry out a survey building on the 2006 survey results and tracking changes in the views of water consumers over the past year.

RESEARCH AIMS

This tracking research is designed to look into consumer views on these topics in order to achieve this understanding and provide an independent, reliable and justifiable platform on which to base future policy and activity.

The main objectives of this research are to:-

- Understand consumers' views about their water and sewerage supply.
- Measure changes in opinion over time.
- Explore consumer perceptions of CCWater's impact and performance on service provision.
- Help CCWater develop an effective communication strategy.

APPROACH

To be consistent with the first wave of consumer research a quantitative methodology was undertaken, using telephone interviewing to survey a random cross section of households across England and Wales.

FIELDWORK

The fieldwork was carried out using CATI (Computer Assisted Telephone Interviewing) and was carried out at FDS' Telephone Centre.

In total 2,088 interviews were achieved across England and Wales. 2000 respondents completed the full survey, and 88 respondents answered all questions except those relating to sewerage services (these were people who said they had septic tanks).

Fieldwork took place between November 2007 and January 2008.

SAMPLE

A random digit dialling (RDD) sample of residential telephone numbers across England and Wales was purchased from an FDS approved supplier UK Changes.

Quotas were set during the interviewing on region and bill payer/non bill payer status as shown in the table below. The sample was stratified by water region rather than proportionate to consumer distribution by area to ensure robust numbers were achieved per region by which to conduct sub-group analysis. A target of circa 200 respondents was in place for each region and that 90% of interviews were with the water bill payer.

Table 1.1: Quotas

	Quota %	Achieved %
REGION		
Eastern	10	10
North West	10	10
Northumbria	10	10
Midlands	10	10
South West	10	10
Southern	10	10
Thames	10	10
Wessex	10	10
Yorkshire	10	10
Wales	10	10
BILL PAYMENT		
Bill payer	90	91
Non bill payer	10	9

As detailed above a stratified sampling approach was used and RDD sample was purchased on a 10:1 basis (10 leads to achieve 1 interview). The sample was also designed to be representative of households across England and Wales, rather than individuals.

QUESTIONNAIRE

In order to understand how consumers' views and opinions have developed over the past year, it was important to maintain a high degree of consistency in the questionnaire content of 2006 and therefore the 2007/08 questionnaire is largely based on the previous survey undertaken.

The questionnaire was however further developed in liaison with CCWater, and amendments have been made as well as additional questions inserted that were not included in the 2006 survey. The questionnaire focussed on the following five key themes:-

- Value for money
- Consumer rights and responsibilities
- Water on tap
- Cleaning up
- Speaking up for water consumers.

The interviews lasted for around 20 minutes and were conducted by telephone using CATI (Computer Assisted Telephone Interviewing).

A copy of the questionnaire is included in the appendices.

DATA PROCESSING AND COMPUTER TABLES

Weighting has been applied to the data to ensure they are representative of household water consumers. With a stratified sample, to enable analysis by water region, weighting was required to correct this deliberate unequal distribution of consumers. Weighting was also applied for social grade and age to ensure findings are representative of households in England and Wales, and addresses any imbalance in sample profiles. A sample profile is included in the Appendix which shows the actual number of interviews achieved against the weighted data.

Computer tables have been provided to CCWater with each question analysed by two pages of sub-groups agreed with CCWater.

INTERPRETATION OF DATA

It should be remembered results are based on a national sample of households – not a census of all households. This means all data are subject to sampling tolerances.

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value less than half a percent but greater than zero.

Throughout the report, we highlight differences between sub-groups of respondents and between the 2006 and 2007 results where they are statistically significant.

2 MAIN FINDINGS

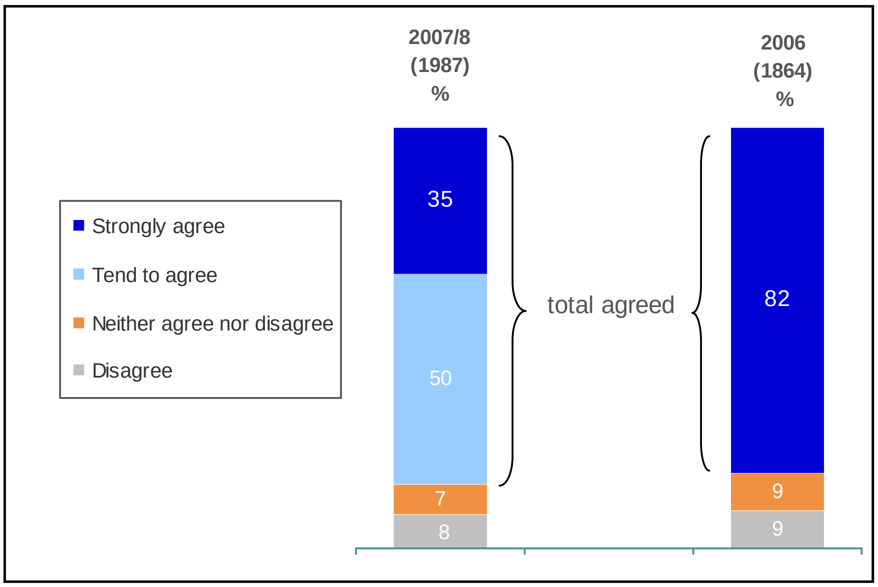
VALUE FOR MONEY

In this section we explore consumers' views on a number of issues relating to value for money. This includes views on billing, value for money from a range of different services, affordability and fairness of water and sewerage bills, and attitudes to switching suppliers.

CLARITY OF WATER AND SEWERAGE BILLS

As the following chart shows, most respondents (85%) agree that the bills they receive from their water and sewerage supplier are clear and understandable (35% strongly agree, 50% tend to agree). This is an improvement on 2006 results when 82% agreed that the bills they receive from their water and sewerage supplier are clear and understandable.

Chart 2.1: Agreement that water and sewerage bills are clear and understandable
(Base: All excluding don't know)



There are a number of significant differences between regions, with Wessex and Yorkshire performing particularly well (91% in both Wessex and Yorkshire agree that the bills they receive are clear and understandable). Consumers in the North West are least likely to agree that the bills they receive are clear and understandable (80%) and a relatively high proportion in this region (including 10% who disagree strongly, a much higher proportion than in any other region) disagree that their water and sewerage bills are clear and understandable.

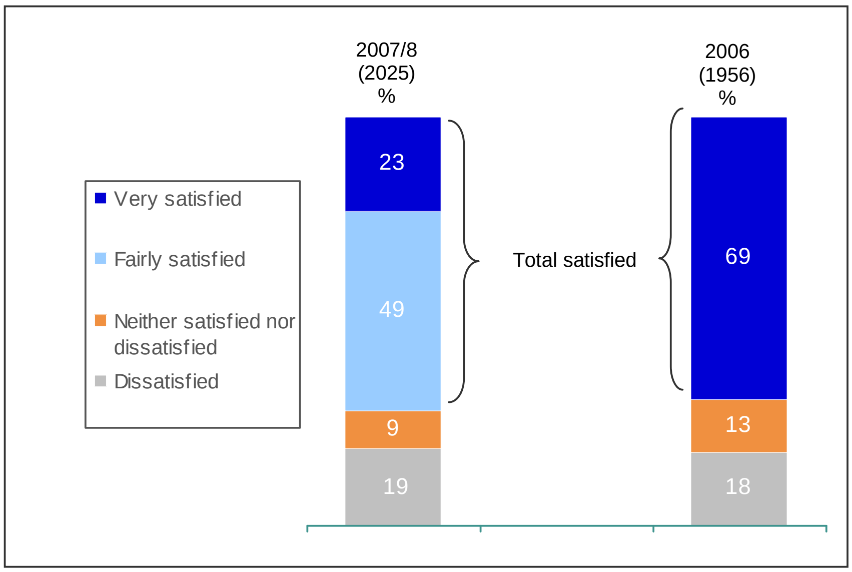
Consumers who are overall satisfied with their water supply are more likely than those who are dissatisfied to say that their bills are clear and understandable (87% compared with 64%).

Consumers who are satisfied with their sewerage supply are also more likely to agree that their bills are clear and understandable (86% compared with 74%). This suggests that there is a halo effect with overall satisfaction influencing specific elements. Therefore some of those critical of bill clarity may have no specific complaints in this area but be generally dissatisfied with their water/sewerage supply.

VALUE FOR MONEY FROM WATER SERVICES

Over seven in ten (72%) respondents say that they are satisfied with the value for money from the water services in their area. These results are in line with 2006 when 69% said that they were satisfied with the value for money.

Chart 2.2: Satisfaction with value for money from water services
(Base: All excluding don't know)



When analysed by region, there are clear differences in perceived value for money from water services. Respondents in the South West are significantly less likely to be satisfied with the value for money from their water services (43% are satisfied, 50% dissatisfied).

Dissatisfaction of consumers in the South West is a marked feature of the survey and a theme that occurs on other questions. This may be due to the fact that consumers in the South West have the highest average bills for water and sewerage services in England and Wales[1].

[1] OFWAT - Water and sewerage charges 2007-08 report, May 2007

Respondents in Northumbria are the most likely to say that they are satisfied with the value for money from their water services (83% satisfied, 12% dissatisfied).

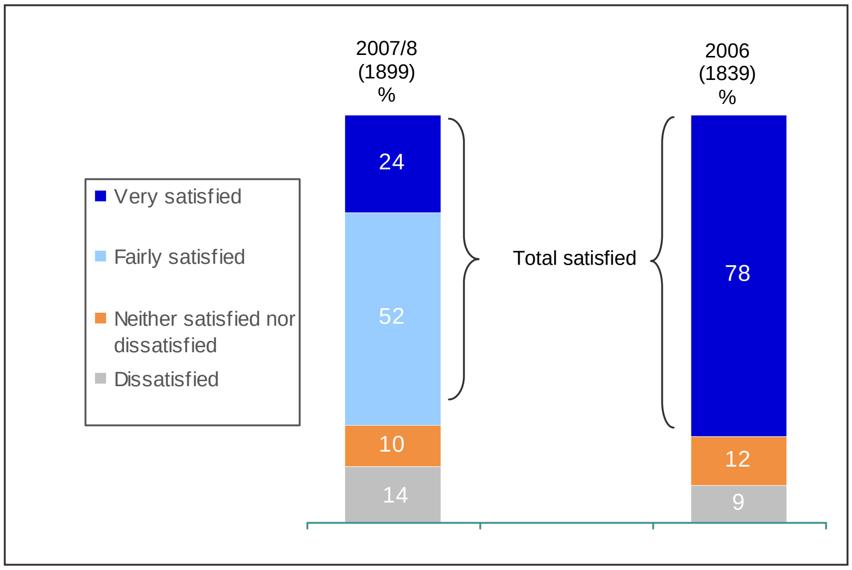
Respondents aged 35-44 are *less* likely than older respondents to be satisfied with the value for money from their water services (63% of those aged 35-44, compared with 73% of those 45-74 and 77% of those aged 75+). It is interesting that perceived value for money is highest among those aged 75+, despite the fact that this group are often on the lowest incomes.

When looked at by household income, those on the lowest incomes are the *most* likely to say that they are *very satisfied* with the value for money from their water services (31% of those on less than £10,000, compared with 19% of those £40,000+). They are however, also most likely to be *very dissatisfied* with the value for money (11% compared with 5%). There is a clear polarisation of views within the low income groups.

VALUE FOR MONEY FROM SEWERAGE SERVICES

Results for value for money from sewerage services are slightly better than the results of satisfaction with water services, with 76% saying that they are satisfied. When compared with the results from 2006 there has been a slight decrease in satisfaction with the value for money from sewerage services (78% were satisfied in 2006, compared with 76% in 2007/08).

Chart 2.3: Satisfaction with value for money from sewerage services
(Base: All excluding don't know/NA)



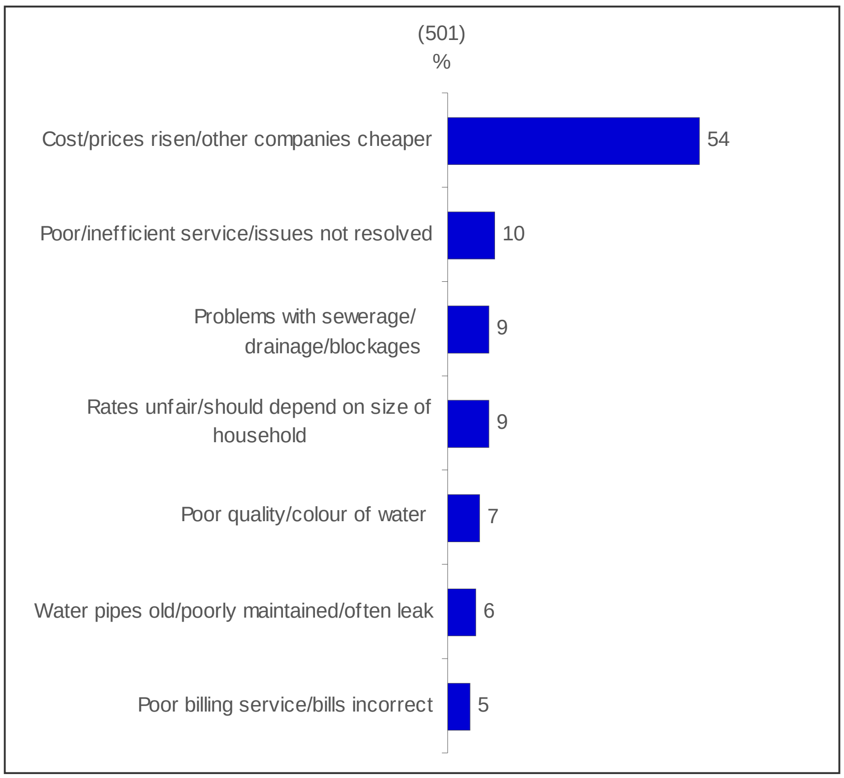
As with the results for satisfaction with water services, when analysed by region, respondents in the South West are significantly less likely to be satisfied with the value for money from their sewerage services (54%). Again, respondents in Northumbria are the most likely to be satisfied (83%).

Housing tenure also has an impact on satisfaction with value for money from sewerage services. Those who rent from a private landlord are less likely than owner occupiers and social renters to be satisfied with the value for money from sewerage services (61% compared with 75% and 81% respectively).

Again, respondents on lower incomes are more likely to be *very satisfied* with the value for money than those on higher incomes (35% of those on less than £10,000 are very satisfied, compared with 24% of those on £40,000+).

As the following chart illustrates, the main reason that consumers are dissatisfied with the value for money from their water and/or sewerage supplier is because of issues relating to price. However, many relate their view of value for money to service quality, or problems encountered.

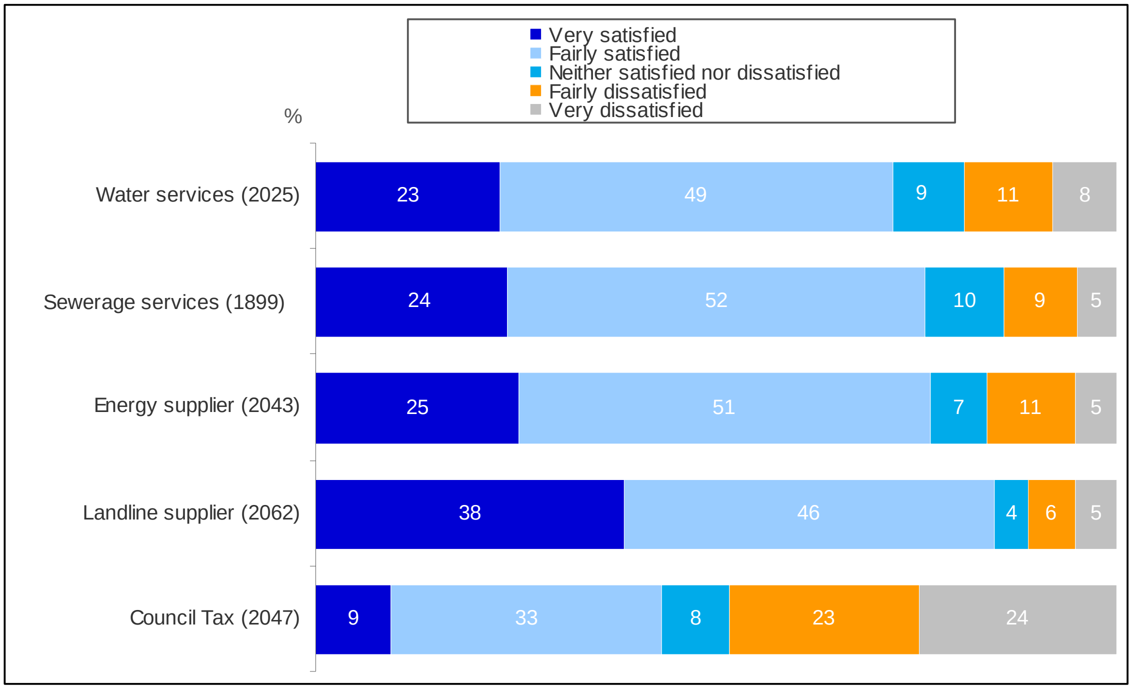
Chart 2.4 Reasons sewerage/water services are not good value for money
(Base: All dissatisfied with value for money of water and/or sewerage supplies)



COMPARATIVE VALUE FOR MONEY FROM DIFFERENT SERVICES

In the 2007/08 survey we added additional questions to examine consumers' perceptions of value for money for a number of different services. The aim was to examine the comparative perceived value for money for water and sewerage services against other services.

Chart 2.5: Satisfaction with value for money from various services
(Base: All respondents excluding DK/NA)



It is clear that peoples' perceived value for money differs greatly by service. Satisfaction with value for money is highest for landline telephone suppliers (84%), followed by energy suppliers (76%). This compares with 72% of respondents saying that they are satisfied with the value for money from their water companies, and 76% satisfied with the value for money from their Sewerage supplier.

Council tax is perceived to be the worst value for money (only 41% say that they are satisfied with the value for money from their council tax).

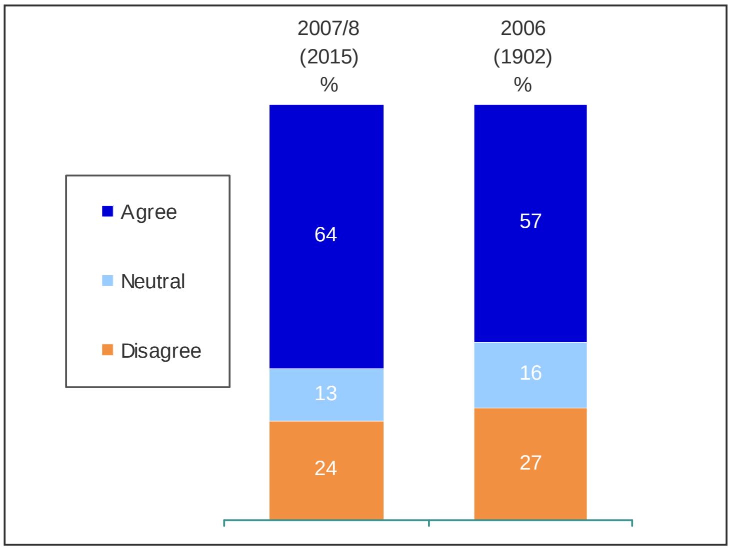
It may be the case that consumers perceive that they are receiving better value for money from services such as their landline telephone supplier and their energy supplier because in these markets consumers are free to switch suppliers. If a telecoms or energy consumer feels that they are not satisfied with the value for money, they can choose a different supplier or shop around for a better deal. In markets where consumers are tied to one supplier this is not the case and therefore there may be the perception that they are not receiving such good value for money.

While we can not prove this hypothesis, it is supported by the fact that among those dissatisfied with their water/sewerage company, many more were potentially interested in the idea of switching providers.

FAIRNESS OF WATER AND SEWERAGE CHARGES

Overall nearly a third (64%) agree that the water and sewerage charges that they pay are fair. These results show perceptions of fairness have improved since 2006 when 57% agreed that the charges they paid were fair.

Chart 2.6: How much do you agree or disagree that the water and sewerage charges that you pay are fair?
(Base: All respondents excluding DK)

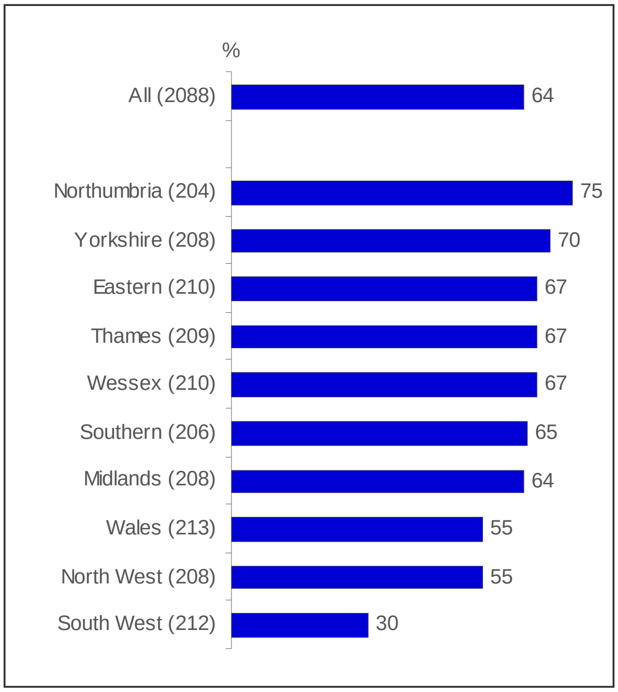


When examined by region, respondents in the South West where charges are higher are significantly less likely to agree that the prices they pay are fair (30% agree). Most residents in the South West disagree (62%) as they think charges are unfair.

Respondents in the North West and Wales are also less likely than others to say that their charges are fair (55% and 55% respectively agree) Again, respondents in Northumbria are the most likely to be satisfied (75%).

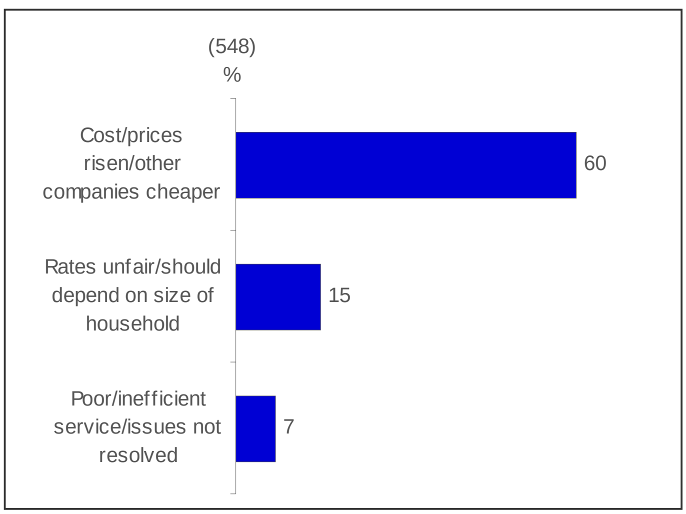
Households with a water meter are more likely than those without to say that the charges they pay are fair (68% compared with 61%). It is encouraging that having a water meter appears to enhance perceptions of fairness.

Chart 2.7: Respondents agreeing that the prices they pay are fair by region
(Base: All respondents excluding DK)



Various reasons were given as to why respondents feel that the water and sewerage charges they pay are unfair. The main reason was due to issues relating to high prices.

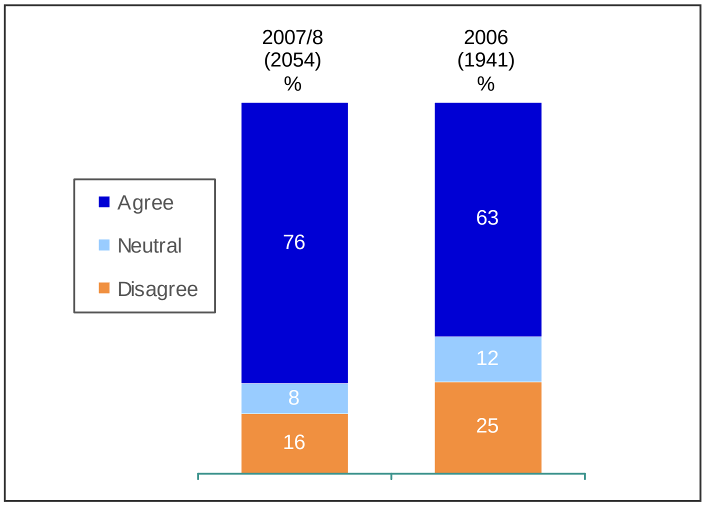
Chart 2.8: Reasons water and sewerage charges are unfair
(Base: All disagreeing that water and sewerage charges are fair)



AFFORDABILITY OF WATER AND SEWERAGE CHARGES

While 64% agree that the bills they pay are *fair*, a significantly higher majority of respondents (76%) agree that the water and sewerage charges that they pay are *affordable*. This is an increase in the perceived affordability of water and sewerage charges since 2006 when only 63% though they were affordable. This may be due to the relatively flat price increases in comparison to 2005/06.

Chart 2.9: How much do you agree or disagree that the water and sewerage charges that you pay are affordable to you?
(Base: All respondents excluding DK)



Consistent with other results and the charges levied, respondents in the South West are significantly less likely to agree that the prices they pay are affordable (54%).

There are a number of other significant differences between sub groups:

- Respondents of higher social grade are more likely to agree that their charges are affordable to them (83% of AB's compared with 70% of DE's agree).

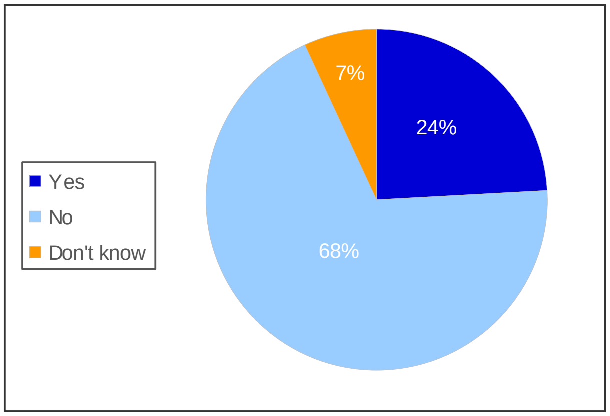
- Consistent with social grade difference, owner occupiers are more likely than social renters to agree that their charges are affordable to them (78% compared with 70%).

- Respondents with a household income of less than £10,000 are less likely than all other income groups to agree that their charges are affordable to them (62% of those on less than £10,000 agree their charges are affordable, compared with 85% of those on £40,000+). This is despite being more likely than other groups to be very satisfied with the value for money.

SWITCHING SUPPLIERS

As discussed previously in the report, respondents tended to be more positive about the value for money from services in markets where they had the opportunity to switch suppliers if they so wished. As the following chart shows, when asked the hypothetical question*: "If you were given the opportunity, would you want to change your supplier of water and sewerage services?"* nearly a quarter (24%) of respondents say that they would want to switch.

Chart 2.10: If you were given the opportunity, would you want to change your supplier of water and sewerage services?
(Base: All respondents - 2088)



Those dissatisfied with their water supply are most likely to want to change (74%). As we might expect, with their general dissatisfaction with water and sewerage charges, residents in the South West are the most likely region to say that they would like to switch (43%).

There are a number of other significant differences between sub groups:

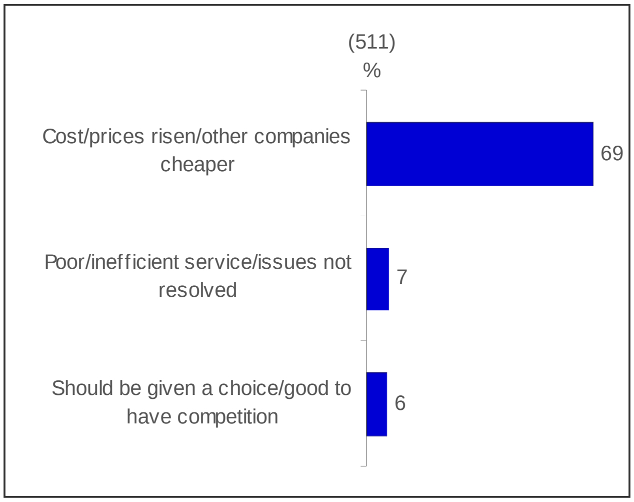
- Likelihood of wanting to switch is closely linked with the age of respondents. Respondents aged 18-44 are the most likely to want to change (31%), followed by those aged 45-74 (21%) with those aged 75+ least likely to want to change (14%). In other markets, such as energy or telecoms, older adults are less inclined to switch than younger people.

- Respondents of higher social grades are more likely to say that they would like to switch supplier if given the opportunity (28% of AB's compared with 21% of C2DE's).

- Private renters are more likely than other tenures to say that they would want to change (32% of private renters, compared with 24% of owner occupiers and 20% of social renters).

As the following chart shows, and consistent with other results, the most common reason given for wanting to change supplier is because of price issues.

Chart 2.11: Reasons for considering changing
(Base: All who would consider changing supplier)



Of all the respondents who would consider changing their supplier if given the opportunity, 58% say that they would still consider it even if it meant some consumers bills went up, 35% said that would not consider it any more and 7% said that they did not know.

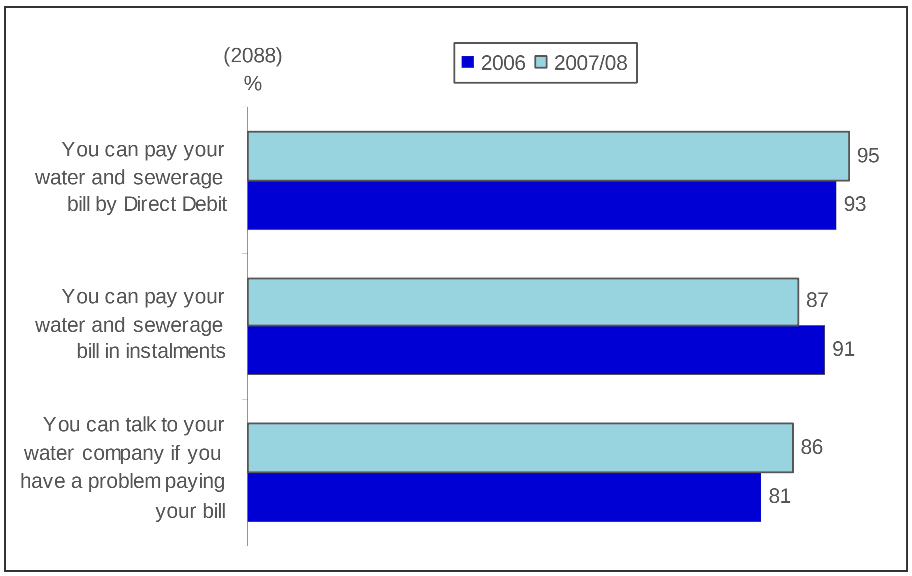
CONSUMER RIGHTS AND RESPONSIBILITIES

In this section we explore consumers' views on a number of issues relating to the rights and responsibilities of water consumers. This includes awareness of billing options, the number of consumers on water meters, awareness and take-up of special tariffs, responsibility for water pipes, awareness of consumer rights, and issues relating to contacting the water companies.

AWARENESS OF BILLING OPTIONS

As the following chart illustrates, awareness of the different billing options available to consumers is fairly high. Nearly all respondents (95%) are aware that they can pay by Direct Debit, 87% are aware that they can pay in instalments, and 86% are aware that they can talk to their water company if they have a problem paying their bill. These results are similar to those in 2006, with a slight decrease in awareness about being able to pay in instalments, and an increase in awareness that consumers can talk to their water company if they have a problem.

Chart 2.12: Proportion aware of issues relating to their bills
(Base: All respondents)



Awareness of direct debit payment is lowest among the youngest and oldest age groups. Among younger respondents (18-34), 92% are aware they can pay by direct debit, and among those 75+, 93% are aware. This compares with 97% of those in the middle age brackets (35-74).

Owner occupiers are more likely than private renters and social renters to be aware that they can pay by direct debit (97% compared with 91% and 87% respectively are aware).

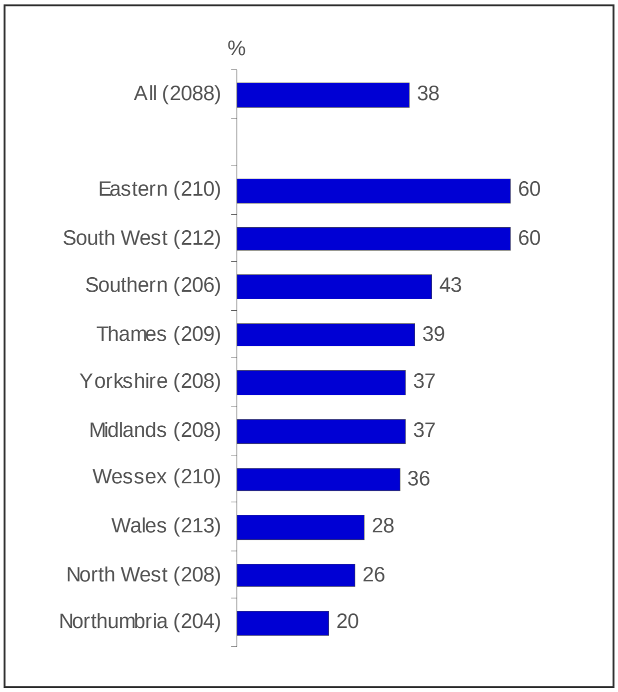
When we examine awareness of being able to contact the water company if there is a problem paying the bill, unsurprisingly bill payers are more likely than non bill payers to be aware (86 compared with 77%). Older respondents are also less likely to say that they are aware of this (74% of those aged 75+ compared with 87% of those under 75 say that they are aware).

WATER METERS

Overall, just under two in five respondents (38%) say that they have a water meter fitted. This is an increase in the number of respondents saying that they have a water meter fitted since 2006, when just 26% said that they had one fitted. As in 2006, penetration of water meters continues to vary greatly by region.

Interestingly, while people can often save money through having a water meter fitted, in areas such as South West with a high proportion of meters, there were lower levels of satisfaction with value for money.

Chart 2.13: Proportion of households with a water meter fitted
(Base: All respondents)



Penetration of water meters varies greatly by the characteristics of the respondent with those one might expect to have low water consumption more likely to have meters than larger families. Some of the key differences are:-

- Older respondents are more likely to have a water meter than those who are younger. 58% of those 75+ and 47% of 61-75 year olds have a meter fitted, compared with 34% of under 60's.

- Respondents living in one person households are more likely to have a water meter fitted (47% of one person households have a meter fitted, compared with 36% of those living in households with more than one person).

- Owner occupiers are more likely than renters to say that they have a water meter fitted (41% of owner occupiers, compared with 30% of private renters and 27% of social renters).

These results are encouraging, as the households who say that they have water meters fitted, are the ones who are most likely to benefit from having a meter i.e. the elderly, and one person households where they are likely to use less water than others.

Of the total sample, 24% did not have a water meter AND were NOT aware they could have one fitted free of charge.

Of all the respondents who did not have a water meter, three-fifths (61%) were aware that they could have one fitted free of charge if they wanted. This is an increase in awareness from 2006, when 50% of those without a meter were aware that they could have one fitted free of charge. Awareness is highest among those in the South West region (86%).

Single parents were the least likely to be aware that they could have a water meter fitted free of charge (41% of those with no meter aware). As previously mentioned, owner occupiers are more likely than other tenures to have a water meter fitted. Among owner occupiers who do not have a meter fitted, awareness is higher than renters that they could have one fitted free of charge if they wanted (65% of owner occupiers, compared with 43% of private renters, and 52% of social renters are aware).

If a consumer requests to have a water meter fitted, they have 12 months to decide whether or not they like it. If they don't, they can go back to the original water rate charge for the property at no cost. A quarter (26%) of unmetered consumers claimed to be aware that this is the case. Again awareness is highest among those in the South West region (42%).

VULNERABLE GROUPS TARIFF

The majority of respondents (87%) are not aware of the vulnerable groups tariff. This includes 76% who say that they do not need to be on the tariff, and 11% who say that they would like to know more.

Table 2.14: Awareness of vulnerable groups tariff
(Base: All respondents)

	(2088) %
AWARE	**12**
Subscribed	1
Aware but no need to subscribe	10
NOT AWARE	**87**
No, but would like to know more	11
No, but do not need it	76

Respondents of social grade C2DE are more likely than AB's to say that they would like to know more (15% of C2DE's compared with 4% of AB's).

Those whose household incomes were very low (under £10,000 per year) were more likely to be aware (16%) and 27% of this group are unaware but keen to know more.

Consistent with social grade differences, respondents who are in rented houses are more likely than owner occupiers to say that they would like to know more (20% of social renters and 17% of private renters compared with 9% of owner occupiers).

Lone parents are also more likely to say that they would want to know more (25% of lone parents compared with 10% of other households).

There certainly appears to be scope to increase awareness among those most likely to be eligible for the vulnerable groups tariff or who know others who might be eligible.

SERVICES FOR ELDERLY AND/OR DISABLED CONSUMERS

Fewer than three in ten (29%) are aware of the services available for elderly and/or disabled consumers. Included in the 71% unaware are 10% of all respondents who would like to know more.

Table 2.15: Awareness of services for elderly and/or disabled consumers
(Base: All respondents)

	(2088) %
AWARE	**29**
Subscribed	1
Aware but no need to subscribe	28
NOT AWARE	**71**
No, but would like to know more	10
No, but do not need it	61

Awareness was highest among those aged 75 or over (37%) and those aged 61-74 (32%).

As we might expect, elderly consumers are the most likely to say that they would like to know more about these services (17% of those 61+, compared with 7% of those 60 and under would like to know more).

Social renters are again significantly more likely than other tenures to say that they would like to know more (17% of social renters, compared with 10% of owner occupiers, and 6% of private renters).

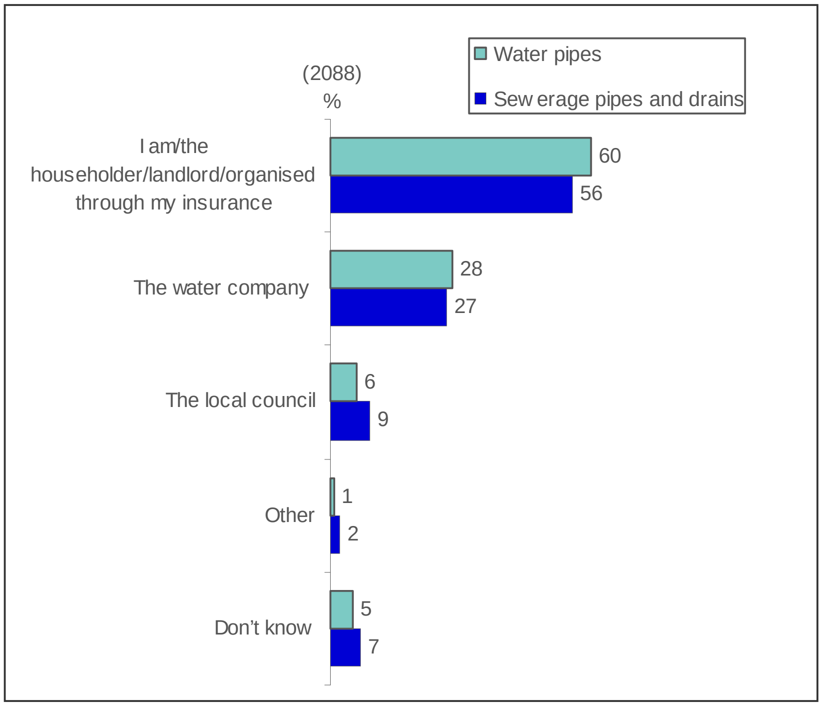
MAINTENANCE OF WATER AND SEWERAGE PIPES

For council tenants it is the local council who is responsible for maintaining the water pipes at the property. Homeowners are responsible for the maintenance of water pipes at their home up to the boundary of their property (i.e. where the property meets the public highway) if the property was built after 1937. Homeowners are also responsible for the maintenance of sewerage pipes and drains at their home up to the point they meet the main sewer.

The following chart illustrates who respondents believe is responsible for the maintenance of the water pipes, and sewerage pipes and drains at their property. Three in five (60%) say that they themselves are responsible for the water pipes at their property, and 56% say that they are responsible for the sewerage pipes and drains at their property.

Over a quarter of respondents mistakenly guess or believe that the water company is responsible for the maintenance of the water pipes and sewerage pipes and drains at their property (28% for water pipes, and 27% for sewerage pipes and drains).

Chart 2.16: Who do you think is responsible for maintaining the water pipes/sewerage pipes and drains at your property?
(Base: All respondents)



As Table 2.17 illustrates, there are significant differences between the views of social renters and owner occupiers/private renters. This is to be expected as for council tenants, the maintenance of their pipes is the responsibility of the council, and not them as individuals.

It is still clear however, that there is some confusion among all housing tenures as to who is responsible for the maintenance of water pipes at residential properties.

Table 2.17: Responsibility for water pipes by housing tenure
(Base: All respondents)

	Owner occupier (1696) %	Private rental (137) %	Social renter (186) %
I am/the householder/landlord/organised through my insurance	65	61	23
The water company	28	22	34
The local council	2	6	33
Other	1	*	1
Don’t know	4	11	9

SERVICE STANDARDS AND COMPENSATION

There are a number of consumer service standards all water companies must comply with which are set out to protect the rights of consumers. Interviewees were asked whether they were aware that if their water and/or sewerage company fails to meet certain consumer service standards for reasons within their control they may be entitled to compensation. Almost half of respondents (44%) claim to be aware. This shows an increase in awareness from 2006 when 39% were aware that they may be entitled to compensation in certain circumstances.

Respondents in the South West are the most likely to be aware that they may be entitled to compensation (55%).

Respondents of a higher social grade are more likely than to say that they are aware (50% of AB’s compared with 38% of DE’s).

CONTACTING THE WATER COMPANIES

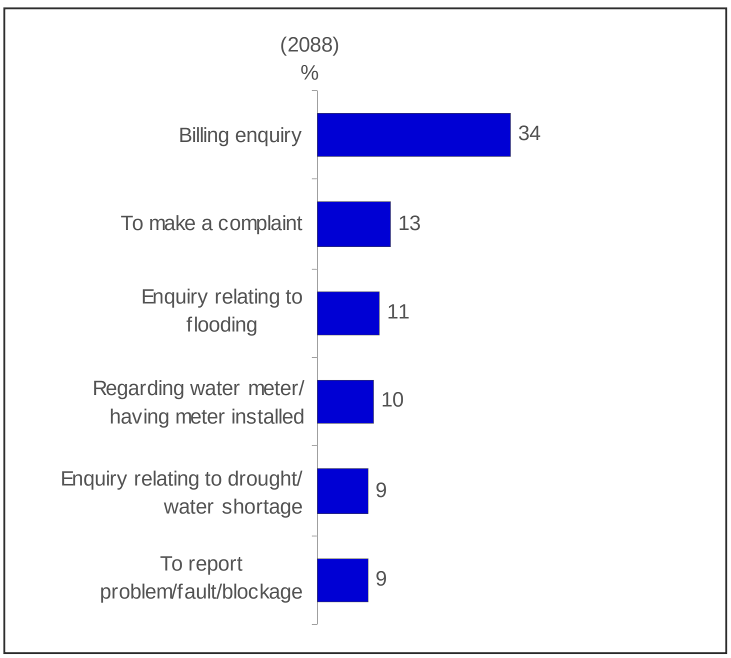
In 2007/08, 16% of respondents say that they have contacted their water company to make an enquiry in the past 12 months. This is an increase in the number of people making enquiries from 2006 when 12% said that they had contacted their water company.

Some of this contact related to water meters and respondents with a water meter are more likely than those without to say that they have made an enquiry in the past 12 months (21% compared with 13%). Those aged 75+ are the least likely group to say that they have made an enquiry (7% of those 75+ compared with 17% of under 75's).

Those who are dissatisfied overall with their water supply are more likely than those who are satisfied to say that they have made an enquiry (54% compared with 14% respectively). This reflects the fact that one of the most frequent reasons for contacting the water company was to make a complaint.

The most common reason respondents contacted their water company was for a billing enquiry (34%).

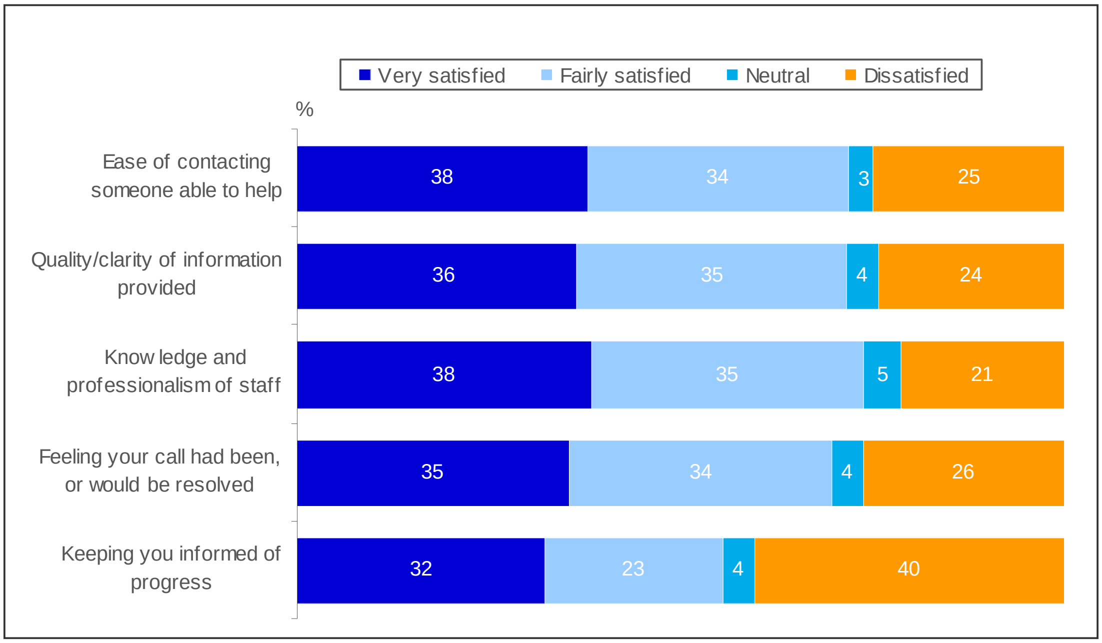
Chart 2.18: Reasons for making contact
(Base: All respondents)



As should be expected, many more consumers were satisfied than dissatisfied in terms of ease of contact, information provided, staff, and feeling the issue would be resolved. However, there remains considerable room for improvement with at least one in five respondents dissatisfied with each aspect of contact with the water companies, and two in five dissatisfied with the way they were kept informed of progress regarding their enquiry/claim.

Satisfaction with contact was generally highest in relation to having a water meter installed but lower among those making billing enquiries and lower still among complainants.

Chart 2.19: Satisfaction with contact
(Base: All respondents contacting their water company excluding DK/not applicable)

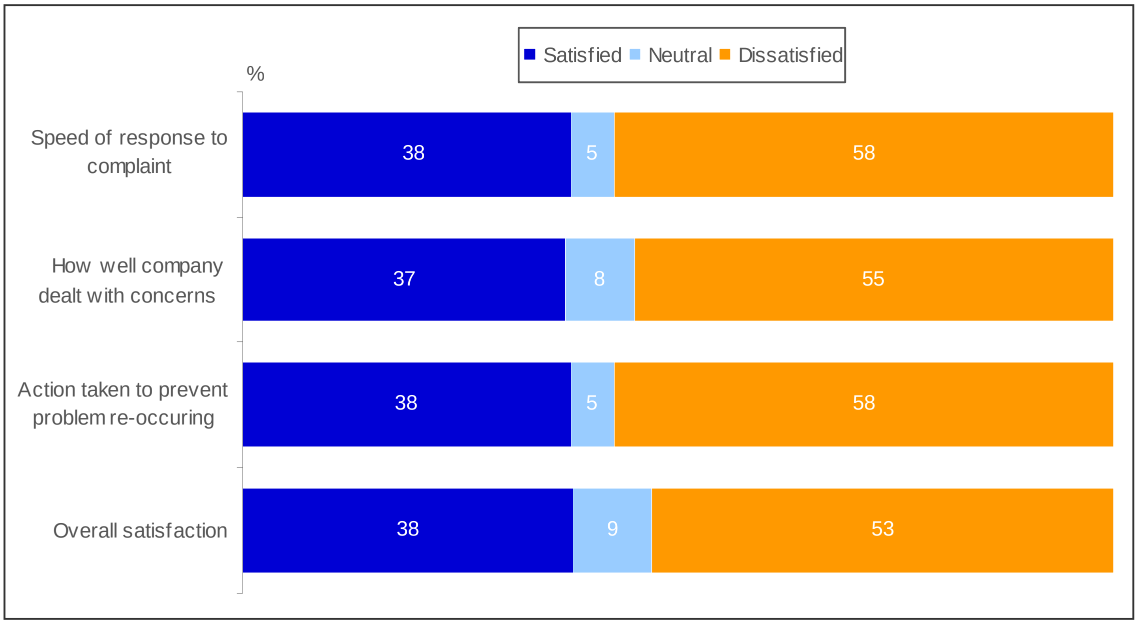


MAKING A COMPLAINT

When prompted, a total of 5% of respondents said that they had made a complaint to their water or sewerage company in the last 12 months. This represents a sizeable number of complaints.

The following chart illustrates the satisfaction with various aspects of the complaint handling process.

Chart 2.20: Satisfaction with complaint handling
(Base: All respondents making a complaint to their water company in the past 12 months excluding DK)



When compared with the results from 2006, the number of consumers dissatisfied with the complaint handling process has increased for all measures.

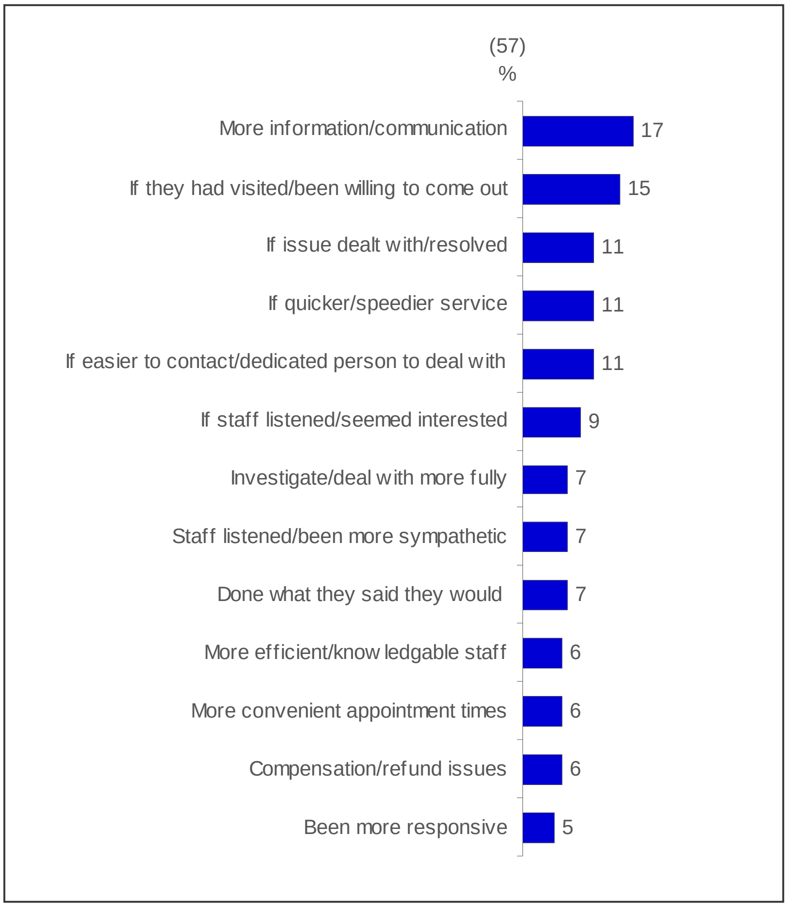
Table 2.21: Proportion of consumers dissatisfied with complaint handling
(Base: All respondents making a complaint to their water company in the past 12 months excluding DK)

	2008 (100) %	2006/07 (111) %
Speed of response to complaint	58	46
How well company dealt with concerns	55	52
Action taken to prevent problem re-occurring	58	51
Overall dissatisfied	**54**	**51**

It is harder to satisfy consumers who are already unhappy and these results are in line with the complaint handling scores achieved by comparable organisations such as telecoms and energy companies. However, organisations with very high service standards such as Identity and Passport Service achieve many more satisfied than dissatisfied complaints so there is considerable scope for water companies to increase satisfaction with complaint handling.

The main way that consumers feel that the complaint handling process could have been improved is through more information and communication (17%), and if they had been visited (15%).

Chart 2.22: How would you have changed the way you complaint was dealt with?
(Base: All not satisfied with complaint handling excluding DK)

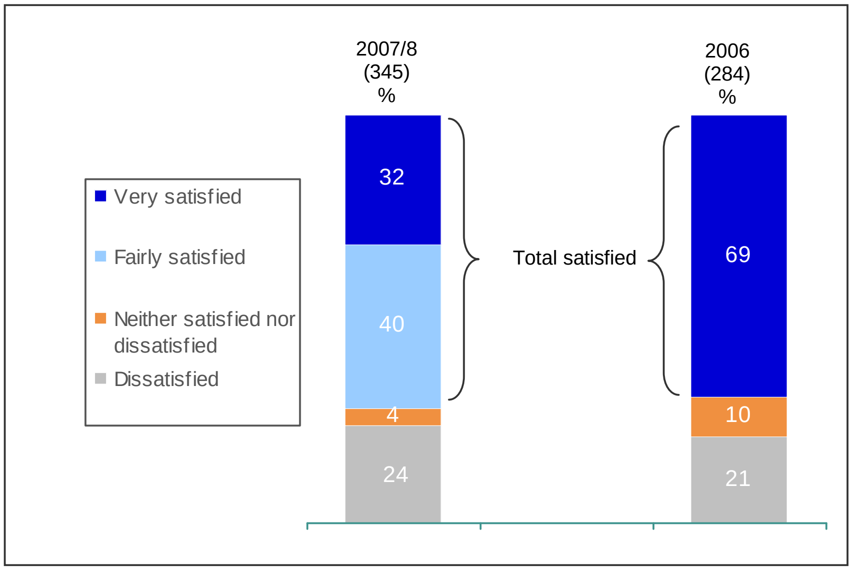


OVERALL SATISFACTION WITH CONTACT

Including those who when prompted remembered making complaints 17% had contact with their water company in the last twelve months.

Taking everything into account, 71% of these respondents say that they are satisfied with the contact with their water company. These results are in line with 2006 when 69% said that they were satisfied.

Chart 2.23: Overall satisfaction with contact
(Base: All respondents contacting their water company excluding DK)



Respondents from the Wessex region are the most likely to say that they are satisfied (94%).

Among those who were dissatisfied with the contact with their water company, the main reason given was because of a lack of or poor information (33%).

Table 2.24: Reasons for dissatisfaction with contact
(Base: All respondents not satisfied with contact excluding DK)

	(86) %
Poor/lack of/slow/incorrect information	33
Poor/unsatisfactory service/issues not dealt with	25
Difficult/slow to contact/no direct contact	18
Staff inefficient/lack of knowledge	8
Had to chase them	7
Staff poor attitude/impolite/unfriendly	7
Cost/expensive/prices have risen	6

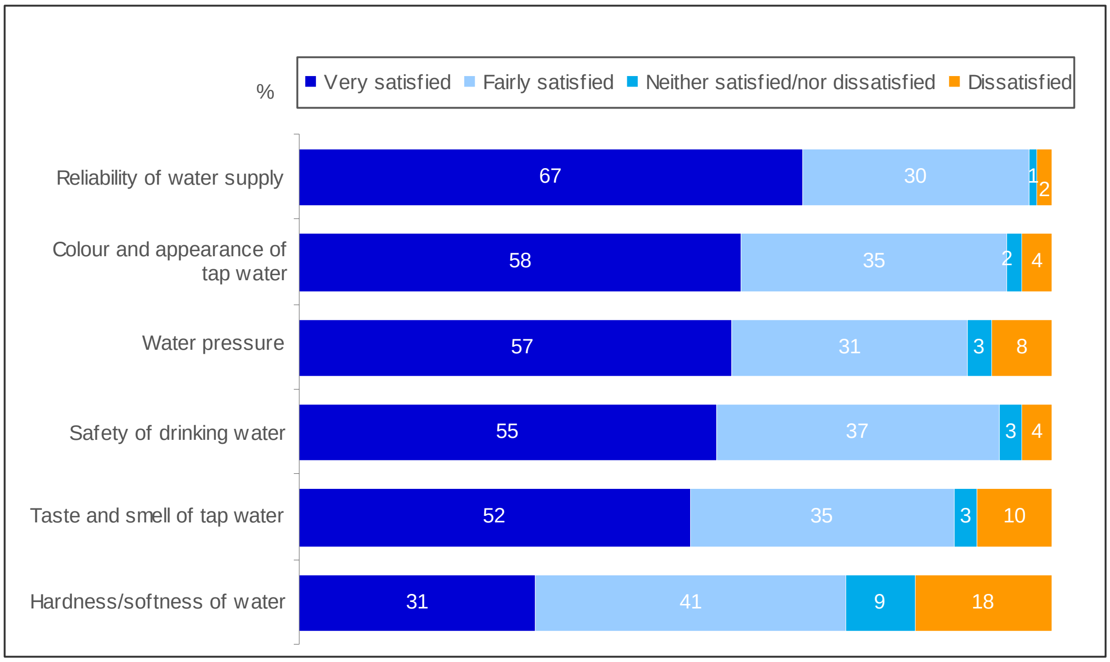
WATER ON TAP

This section explores consumers' views on a number of issues relating to their water supply, including, their overall satisfaction with their water supply, tap water versus bottled water and efforts to reduce the amount of water that consumers use.

SATISFACTION WITH WATER SUPPLY

There are high levels of satisfaction for nearly all aspects of water supply, with very few consumers dissatisfied with their water supply. Consumers are most satisfied with the reliability of their water supply (97%), and least satisfied with the hardness/softness of their water (72%).

Chart 2.25: Satisfaction with various aspects of water supply
(Base: All respondents excluding DK)



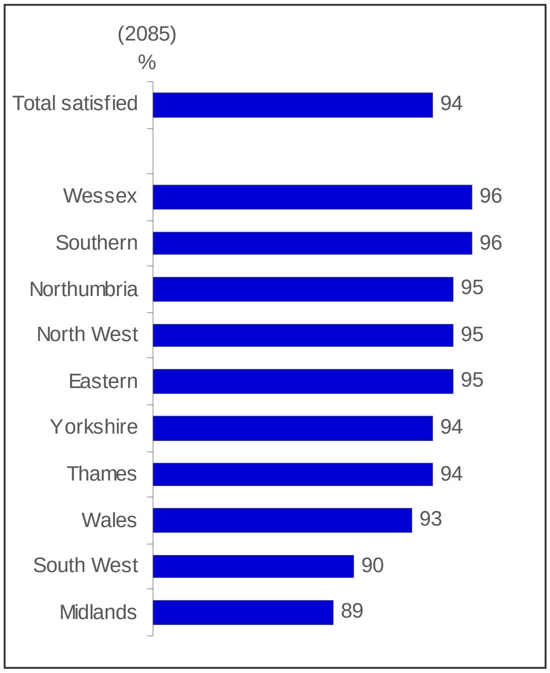
As the following chart illustrates, all measures have shown an increase in satisfaction between the 2006 and 2007/08 survey. These increases are mostly statistically significant and show a clear pattern.

Table 2.26: Satisfaction with various aspects of water supply 2006/07 - 2008
(Base: All respondents excluding DK)

	Base size	2007/08 %	Base size	2006 %
Reliability of water supply	2078	97	1989	95
Colour and appearance of tap water	2082	94	1993	90
Water pressure	2069	89	1987	87
Safety of drinking water	2011	92	1907	87
Taste and smell of drinking water	2052	87	1949	83
Hardness/softness of water	1938	72	1881	68
Overall satisfaction	**2085**	**94**	**1994**	**92**

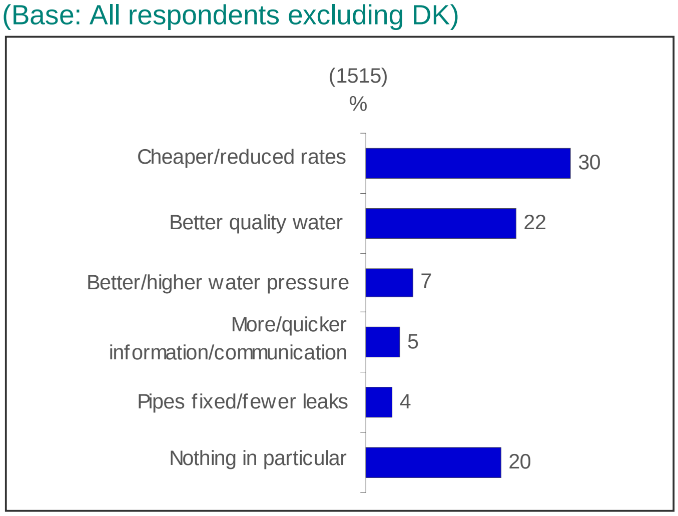
The majority of respondents (94%) are satisfied overall with their water supply, and there is little difference in satisfaction by region. Respondents in the Midlands (89%) and the South West (90%) are however, slightly less likely to be satisfied when compared to some other regions.

Chart 2.27: Overall satisfaction with water supply by region
(Base: All respondents without septic tanks for sewerage services excluding DK)



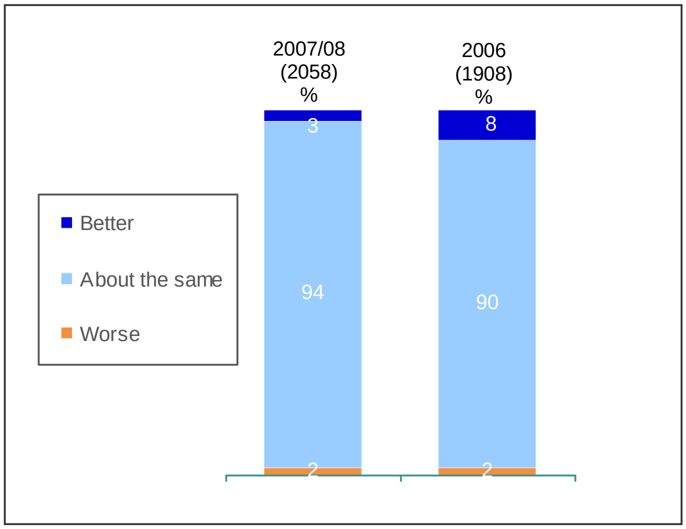
As in 2006, reducing prices and improving the quality of water are still the most widely suggested improvements to the overall service provided by the water companies. As we might expect, respondents in the South West are significantly more likely than respondents from all other regions to suggest reduced rates (56%).

Chart 2.28: If you could make one single improvement to the overall service provided by your water company what would it be?
(Base: All respondents excluding DK)



Very few respondents (2%) think that service from their water company has got worse over the past year. The vast majority (94%) think that the service has stayed the same over the past year. The number of respondents saying that their service has improved over the past year has decreased since the 2006 survey (8% in 2006 compared with 3% in 2007/08).

Chart 2.29: Changes in service over the past year
(Base: All respondents excluding DK)

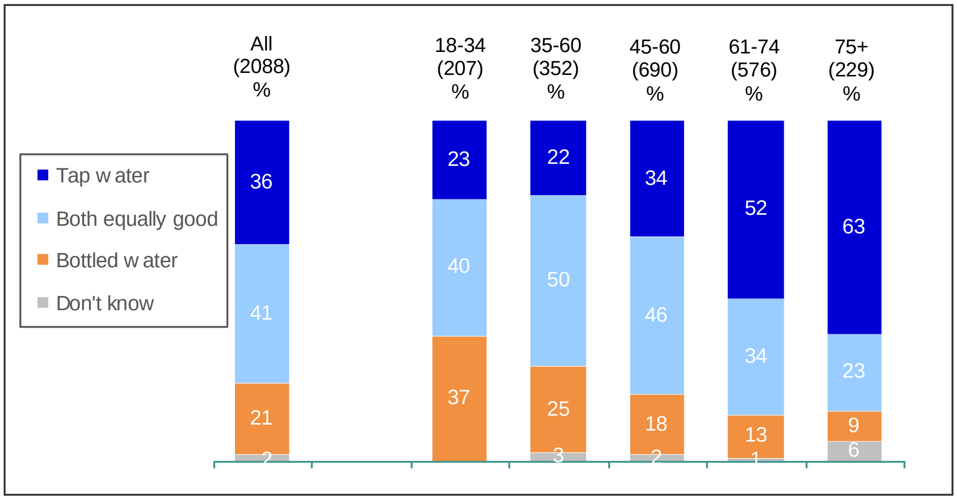


TAP WATER VS. BOTTLED WATER

Four in five adults (79%) believe tap water to be at least as good for them as bottled water. Sub group differences reflect the way bottled water companies have targeted their messages at particular demographic groups.

Overall, 36% of respondents think that tap water is better for them, 21% think bottled water is better, and 41% think that they are equally good for you. As the chart below shows, there is a clear link between age and opinions on bottled vs. tap water. Younger respondents are more likely to favour bottled water, whereas older respondents are more likely to think that tap water is better for them.

Chart 2.30: Which is better for you?
(Base: All respondents)



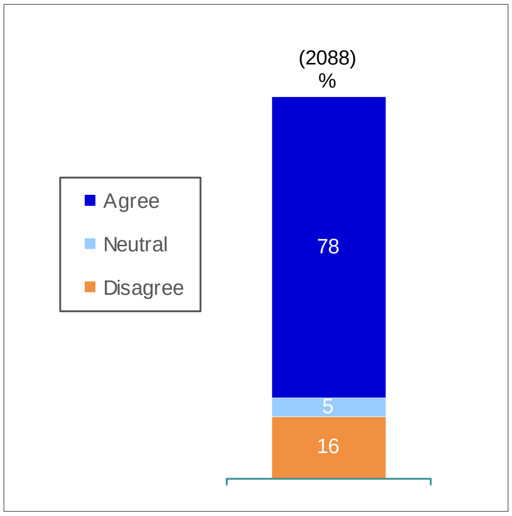
Those who are overall dissatisfied with their water supply, are more likely than those who are satisfied to say that they think bottled water is better for them (36% compared with 20%).

Respondents of social grade ABC1 are more likely than DE's to say that they think bottled water is better for them (46% compared with 32%).

Households with children are less likely than households without, to say that they think tap water is better for them (29% of two parent families, and 22% of single parent families think that tap water is better for them, compared with 42% of households without children).

The majority of respondents (78%) agree that they usually drink tap water rather than bottled water, with 16% disagreeing.

Chart 2.31: Agreement with the statement - I usually drink tap rather than bottled water
(Base: All respondents)



Respondents aged 61+ are more likely than younger respondents to say that they usually drink tap water (86% of those aged 61+ compared with 74% of those 60 and under).

Single parents are the least likely group to agree that they usually drink tap water (65% of single parents say that they usually drink tap water compared with 78% of others).

Issues surrounding tap water versus bottled water have gained much publicity recently, with the UK Environment Minister Phil Woolas describing the amount the country spends on bottled water as "morally unacceptable". There is definitely an opportunity for CCWater to help raise awareness that tap water is equally as good for you as bottled water, and encourage consumers to drink tap water rather than bottled water.

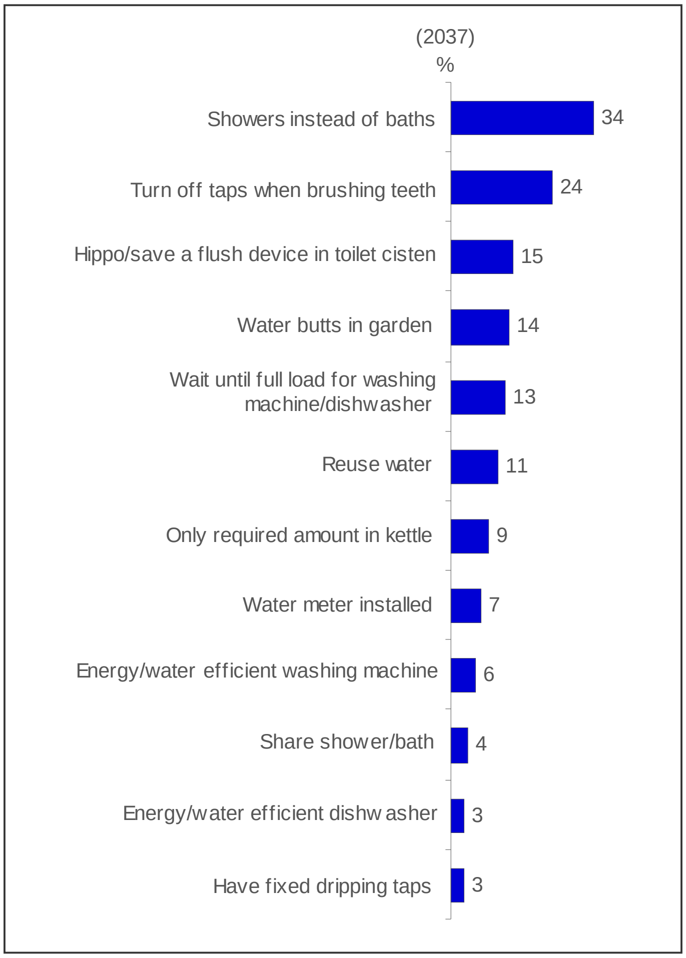
Reducing use of water

Encouraging people to use water wisely is one of CCWater’s key areas of work. Consumers in England and Wales are using more and more water and in some areas there were restrictions on its use in 2005-2006.

Nearly all respondents (97%) agree that everyone needs to do what they can to reduce the waste of water. This is in line with the 2006 results when 96% agreed that there is a need to minimise wasteful use of water.

A wide range of actions are claimed by consumers to reduce their use of water as shown in the following chart.

Chart 2.32: Actions taken to reduce wasteful use of water
(Base: All respondents who agree that everyone needs to do what they can to reduce the waste of water)

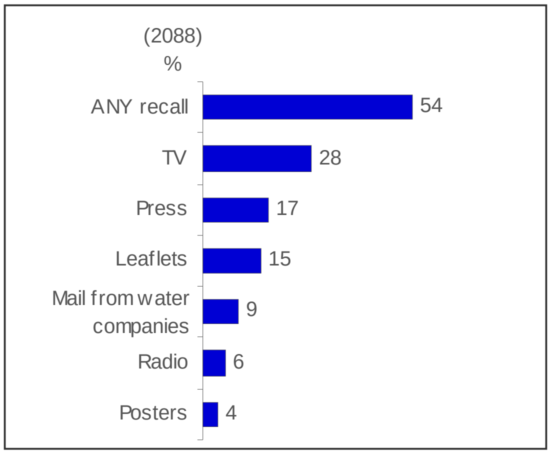


Respondents aged 61+ are less likely than younger respondents (18-44) to say that they share a shower/bath (7% of 18-44 year olds compared with 1% of those aged 61+ share a shower/bath to help reduce their use of water).

AWARENESS OF WATER CAMPAIGNS

Just over half (54%) claim to have been made aware of campaigns to use water wisely in the past 12 months.

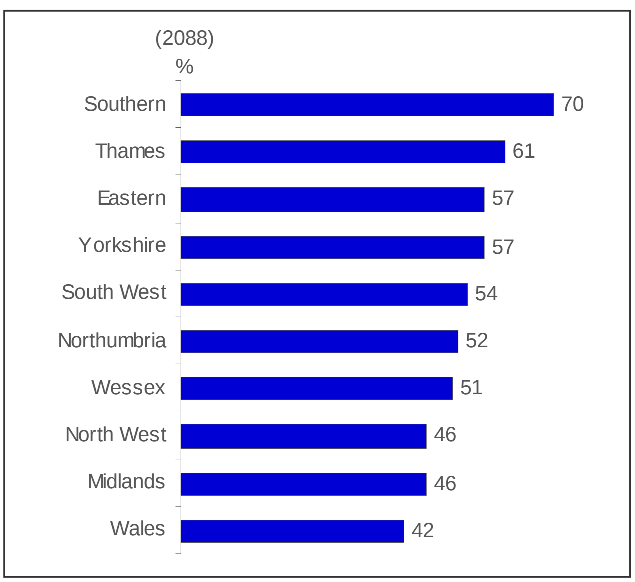
Chart 2.33: How have you been made aware, if at all, of campaigns to use water wisely?
(Base: All respondents)



As the following chart shows, respondents in the Southern region are the most likely to say that they have been made aware of campaigns to use water wisely in the past 12 months (70%). Respondents in Wales are the least likely to have been made aware (42%). These differences are quite large and suggest major differences between water companies in how hard they push water conservation messages.

Companies operating in the more densely populated south east appear to promote such messages more strongly than those operating in more rural areas, especially Wales, where water shortages have been less of a problem in recent years.

Chart 2.34: Proportion aware of campaigns to use water wisely
(Base: All respondents)



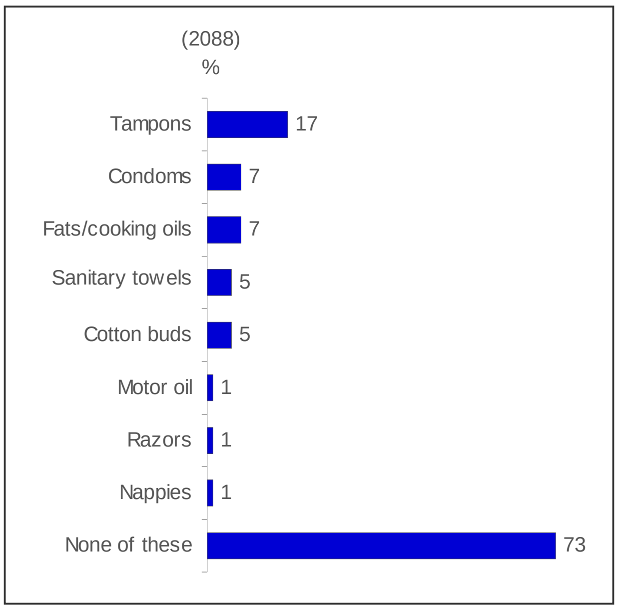
CLEANING UP

In this section we explore consumers views on a number of issues relating to disposing of waste, including views on what is acceptable to dispose of down the toilet, sink, or drain, what happens to waste water, and overall satisfaction with sewerage services.

Disposing of waste

There are a number of items which are not appropriate to flush down the toilet, sink, or drain. As the following chart shows, 17% of respondents believe that it is acceptable to flush tampons down the toilet (this rises to 24% among women). Nearly three quarters (73%) more correctly answered that none of the items below are acceptable to dispose of down the toilet, sink, or drain.

Chart 2.35: which of the following are acceptable to dispose of down the toilet, sink, or drain?
(Base: All respondents)

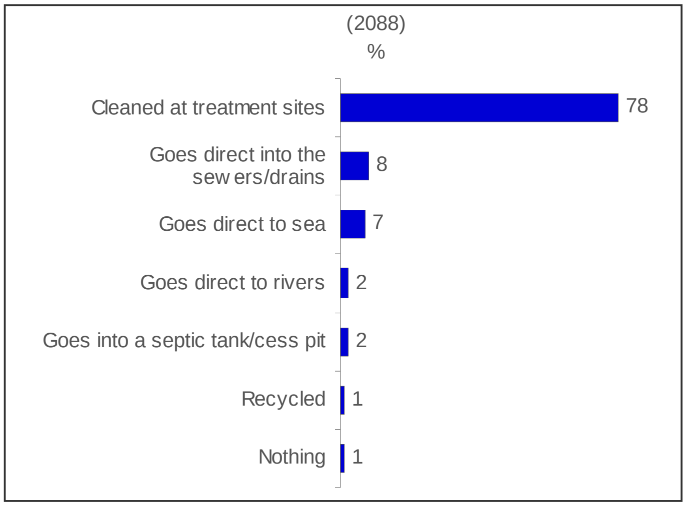


Waste water

Waste water that goes down the toilet or sinks from households in the UK is cleaned at treatment sites before it is released back into the environment. In some cases wastewater goes into a septic tank.

Four in five respondents (80%) were aware that their waste water was cleaned at treatment sites or went into a septic tank, however some believe it goes direct into the sea or rivers without being treated.

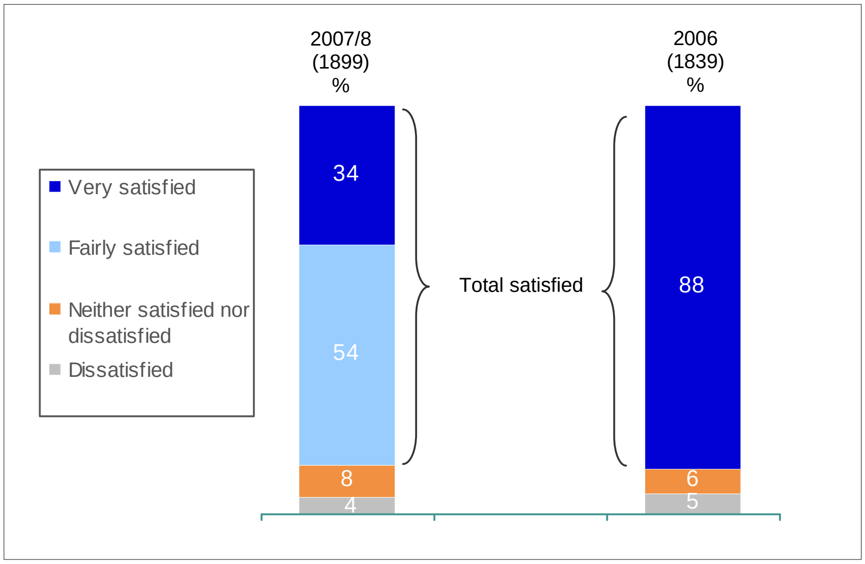
Chart 2.36: What happens to waste water that goes down the toilet/sink in your property?
(Base: All respondents excluding DK)



SATISFACTION WITH THE SEWERAGE SERVICES

Excluding those who say that they don't know, overall satisfaction with sewerage services has not changed since 2006, with a total of 88% saying that they are satisfied.

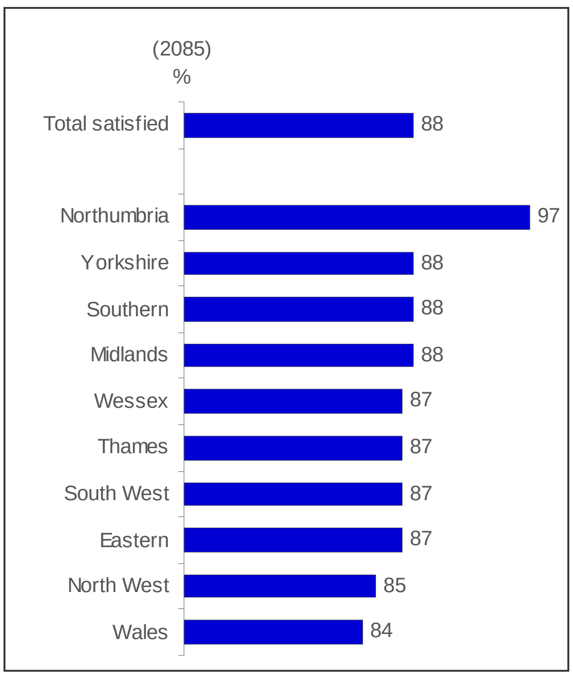
Chart 2.37: Overall satisfaction with sewerage services
(Base: All respondents without septic tanks excluding DK)



Respondents in the Northumbria region are more likely than all other regions to say that they are satisfied with their sewerage service (97%).

Those aged 75+ are more likely than all other age groups to say that they are satisfied (98% of those aged 75+, compared with 87% of those 74 and under).

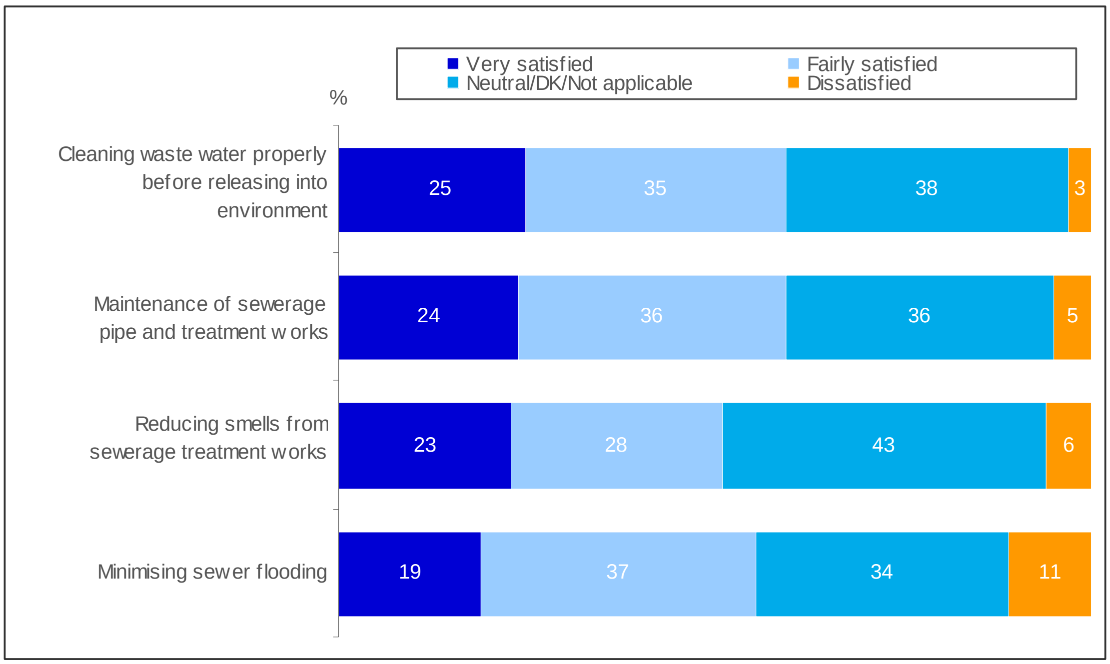
Chart 2.38: Overall satisfaction with sewerage services by region
(Base: All respondents without septic tanks excluding DK)



When examining in more detail consumers' satisfaction with different aspects of the sewerage company's management of sewerage services, few respondents are dissatisfied. The area of sewerage services most respondents are dissatisfied with is minimising sewer flooding (11%).

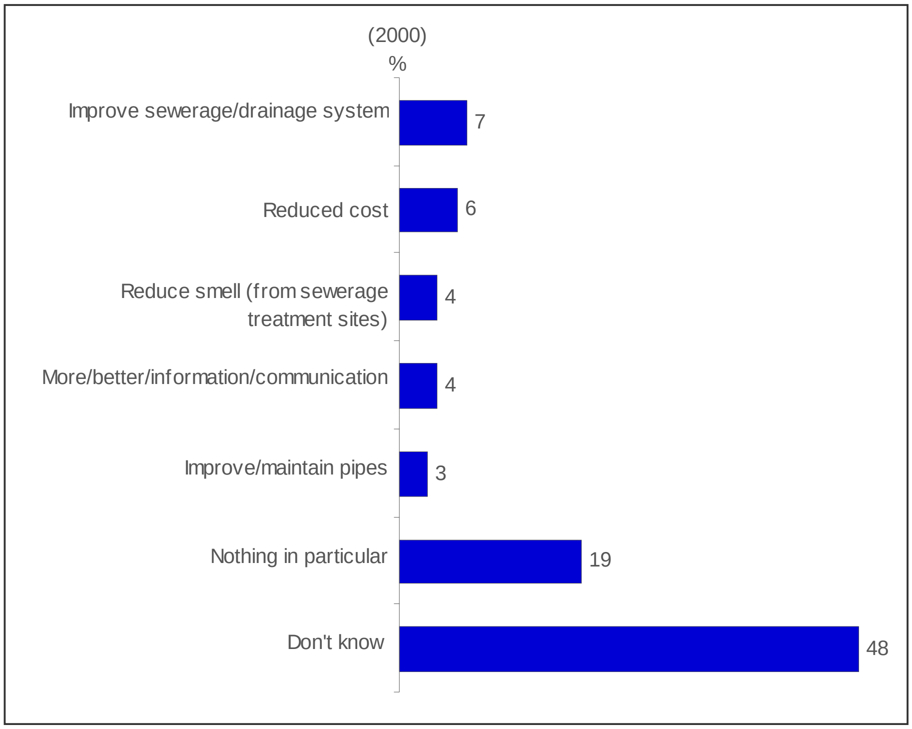
At least a third of respondents say that they have no strong opinion, don't know, or that it is not applicable to them when asked about each of the aspects of their sewerage services. It is clear from this that consumers are far less engaged when it comes to discussing their sewerage services, compared to when discussing their water services.

Chart 2.39: Satisfaction with various aspects of sewage services
(Base: All respondents excluding those with septic tanks - 2000)



As the following chart shows, when asked what could be done to improve their sewerage services nearly half (48%) say that they don't know, and a further 19% say nothing in particular. Improved sewerage/drainage systems (7%) and reduced costs (6%) are the most commonly cited ways that their sewerage services could be improved.

Chart 2.40: What could be done to improve sewerage services
(Base: All respondents excluding those with septic tanks)



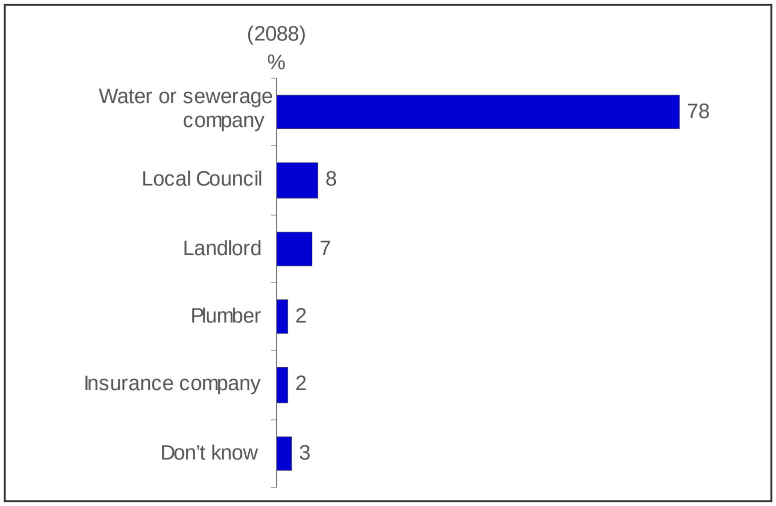
SPEAKING UP FOR WATER CONSUMERS

In this section we explore consumers views on a number of issues relating to the reporting of problems with consumers water and sewerage supply, awareness of CCWater, and the perceived importance of CCWater as an organisation.

Who to contact to report a problem

The majority of respondents (78%) say that they would contact their water or sewerage company if they had a problem. This is in line with results in 2006 when 76% said that they would contact their water or sewerage company.

Chart 2.41: Who would you contact if you had a problem with your water or sewerage services?
(Base: All respondents)



Owner occupiers and private renters are most likely to contact their water or sewerage company (90% of owner occupiers, and 82% of private renters, compared with 54% of social renters).

Social renters are more likely to contact their local council (37%, compared with 4% of owner occupiers, and 7% of private renters).

AWARENESS AND PERCEIVED IMPORTANCE OF CCWATER

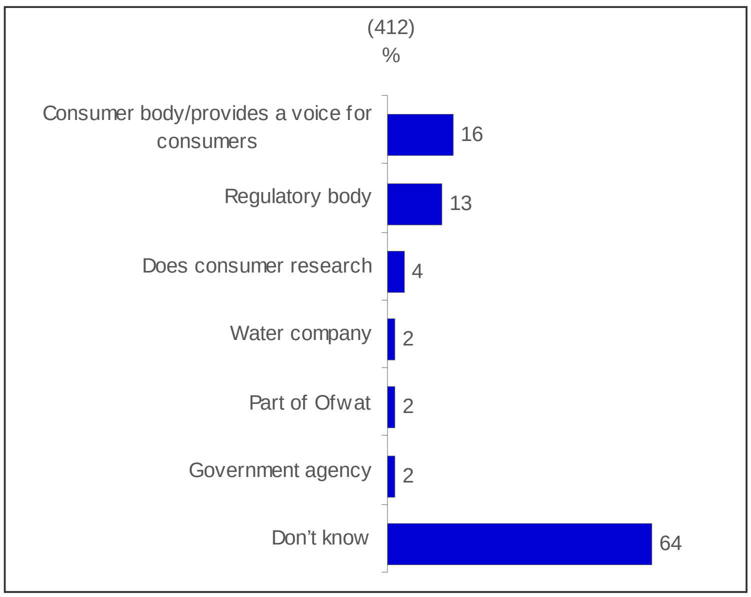
Respondents were asked a series of questions to assess their awareness of CCWater. When first asked if they knew the name of the consumer body for the water industry, a quarter (26%) said yes, they did.

Only one respondent spontaneously mentioned CCWater as the consumer body for the water industry. Nearly a quarter of respondents (23%) thought that OFWAT was the consumer body for the water industry.

When probed, a further 18% of respondents claimed to have heard of CCWater before taking part in the survey. In 2006 when the positioning of the questionnaire almost certainly inflated awareness, 32% of respondents said that they were aware of CCWater.

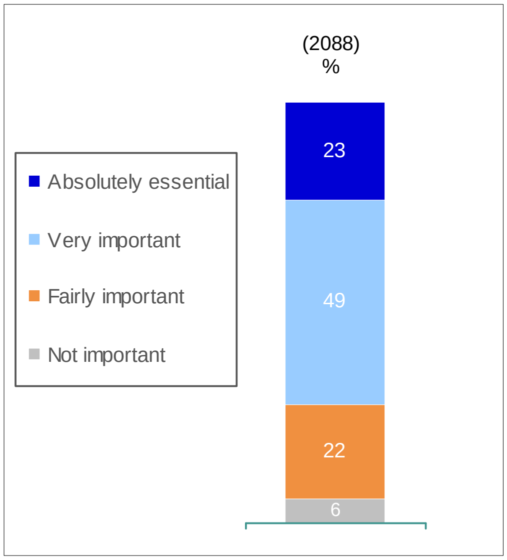
Of those in the current survey who are aware of CCWater nearly two thirds (64%) were unable to say what CCWater does, 16% think it is a consumer body, and 13% think that it is a regulatory body. It is fair to say, therefore that while the long-established OFWAT is very widely known, people know little about CCWater.

Chart 2.42: What, if anything do you know about CCWater?
(Base: All aware of CCWater)



Despite over four in five respondents saying that they are not aware of CCWater, the majority of respondents do think that it is important to have a consumer body representing their interests about the water and sewerage services they receive. Nearly a quarter (23%) think that it is absolutely essential, 50% think it is very important, and 22% think that it is fairly important. Only 6% think that it is not at all/not very important.

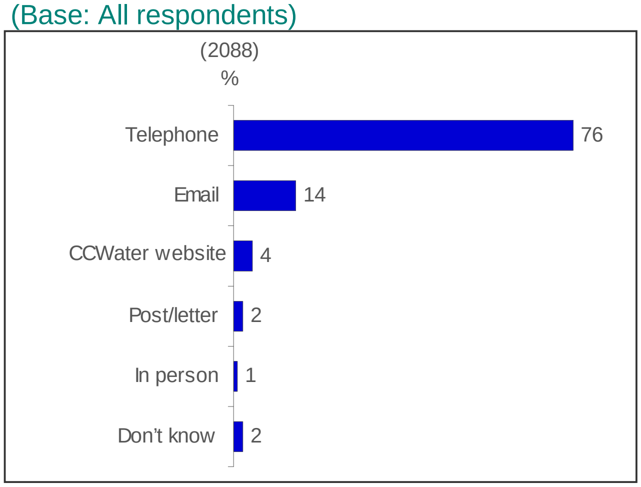
Chart 2.43: Importance of having a consumer body representing your interests about the water and sewerage services received
(Base: All respondents excluding DK)



CONTACTING CCWATER

The majority of respondents say if they needed to, their preferred method of contact with CCWater would be via telephone (76%). This result is similar to 2006 when 75% stated the telephone as their preferred method of contact.

Chart 2.44: Preferred method of contacting CCWater
(Base: All respondents)



A total of eight respondents say that they had contacted CCWater in the last year (this represents 0.4% of the total sample). Reasons for respondents contacting CCWater included billing enquires, to make a complaint, work related reasons, and because of contaminated water or water supply being cut off.

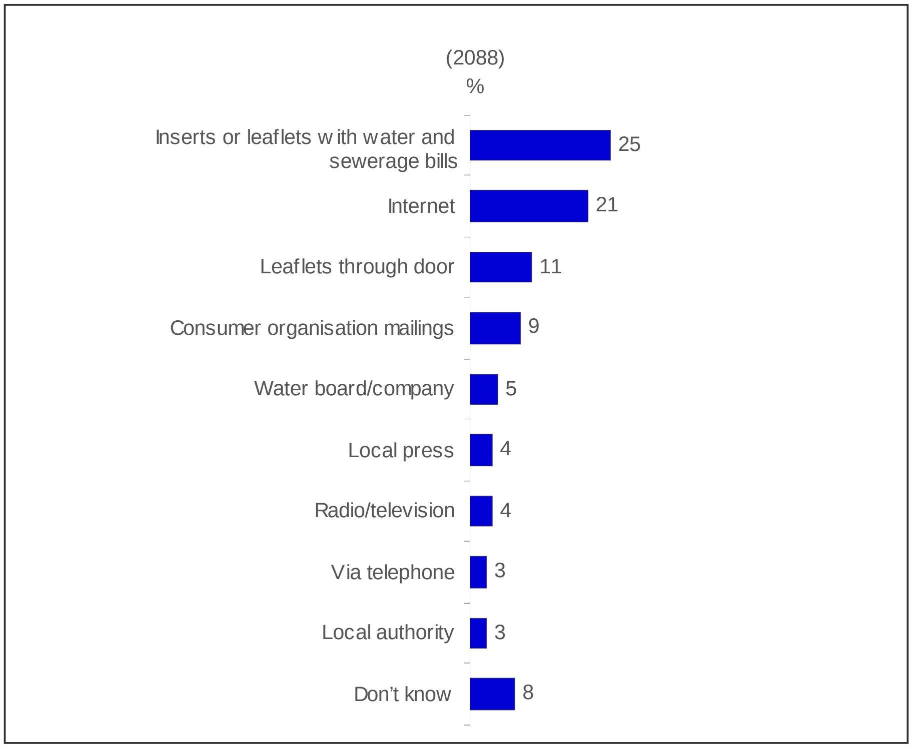
The following table shows how aware respondents are of a number of issues relating to CCWater. Nearly a half of the 18% of all respondents aware of CCWater say that they would know how to contact CCWater if they had a problem or needed advice. This means less than 10% of water consumers are aware of CCWater AND would know how to contact them. 44% of those aware of CCWater rate CCWater as being effective in representing their views and 34% say that they have seen references to CCWater or CCWater press notices.

Table 2.45: Agreement with statements about CCWater
(Base: All aware of CCWater - 412)

	Agree %	Neutral %	Disagree %	Don't know %
I know how to contact CCWater if I have a problem or need advice	48	7	39	6
I rate CCWater as being effective in representing my views	44	19	13	24
I have seen references to CCWater or CCWater press notices	34	10	47	9

Respondents' preferred source of information relating to their water and sewerage services is through inserts or leaflets with water and sewerage bills (25%), or on the internet (21%). These results are consistent with 2006 when these were the two most popular sources of receiving information (17% mentioned leaflets, and 16% the internet in 2006).

Chart 2.46: preferred source of information relating to water and sewerage services
(Base: All respondents)



3 CONCLUSIONS AND RECOMMENDATIONS

Overall, results of the 2007/08 survey are very consistent with those in 2006 but some changes are evident.

- The majority of consumers feel is important to have a consumer body representing their interests about the water and sewerage services they receive, yet they do not know who is responsible for this, and less than one in five claims to have heard of CCWater. If CCWater wishes to continue to provide a strong consumer voice within the industry it should seek to further publicise its role and increase consumer awareness.

- There are lots of consumers who would like to know more about the special tariffs available to consumers. CCWater should seek to improve awareness of the Vulnerable Groups tariff and the services for older people.

- It is harder to satisfy consumers who are already unhappy and results for complaint handling are in line with the complaint handling scores achieved by comparable organisations such as telecoms and energy companies. However, organisations with very high service standards such as Identity and Passport Service achieve many more satisfied than dissatisfied complaints so there is considerable scope for CCWater to work with water companies to increase satisfaction with complaint handling.

- The majority of respondents think that tap water is at least as good as bottled water for them. There are however still large number of consumers who believe that bottled water is better for them, and say that they usually drink bottled water. There is an opportunity for CCWater to help increase awareness that tap water is equally as good for you as bottled water and to urge people to drink tap water. Figures on the relative mineral content of tap and bottled water may help. This is especially important in the wake of recent publicity, questioning why UK consumers spend so much on bottled water, such as UK Environment Minister Phil Woolas describing the amount the country spends on bottled water as "morally unacceptable".

- Unmetered consumers are becoming more aware that they can have a water meter fitted free of charge. There are however still large numbers of consumers who could benefit from having a water meter fitted, but are not aware that they can have it fitted free of charge. Raising awareness of this could help certain groups of consumers to save money on their water bills, which in turn is likely to improve their overall satisfaction with water and sewerage services.

- CCWater should aim to increase awareness of what is acceptable to dispose of down the toilet, sink, or drain, especially as nearly a quarter of women think that it is acceptable to flush tampons down the toilet, sink or drain.

APPENDIX A
SAMPLE PROFILE

SAMPLE PROFILE

	Unweighted		Weighted	
	N	%	N	%
Total	**2088**	**100**	**2088**	**100**
Region				
Eastern	210	10	251	12
North West	208	10	271	13
Northumbria	204	10	104	5
Midlands	208	10	332	16
South West	212	10	63	3
Southern	206	10	167	8
Thames	209	10	480	23
Wessex	210	10	104	5
Yorkshire	208	10	188	9
Wales	213	10	125	6
Bill Payment				
Bill payer	1890	91	1884	90
Non bill payer	198	9	204	10
Age				
18-34	207	10	376	18
35-44	352	17	438	21
45-60	690	33	606	29
61-74	576	28	431	21
75+	229	11	195	9
Refused	34	2	42	2
Gender				
Male	973	47	951	46
Female	1115	53	1137	54
Household composition				
One person household	553	26	520	25
Two person household	692	33	655	31
One parent family	125	6	135	6
Two parent family	644	31	686	33
Other	21	1	21	1
Meter use				
Meter users	841	40	803	38
Non users	1233	59	1262	60

	Unweighted		Weighted	
	N	%	N	%
Total	**2088**	**100**	**2088**	**100**
Income				
Less than £10,000	207	10	215	10
£10,000 - £19,999	276	13	255	12
£20,000 - £29,999	250	12	254	12
£30,000 - £39,999	184	9	215	10
£40,000 - £49,999	120	6	124	6
£50,000 - £59,999	78	4	80	4
£60,000+	130	6	144	7
Refused/DK	843	40	802	38
Social grade				
A	62	3	41	2
B	488	23	376	18
C1	524	25	585	28
C2	354	17	408	20
D	172	8	205	10
E	360	17	348	17
Refused	128	6	125	6

APPENDIX B

THE QUESTIONNAIRE

FDS International Ltd
Hill House, Highgate Hill
London N19 5NA
Tel: 020 7272 7766 Fax: 020 7272 4468

C1	C2	C3	C4	C5	C6	C7
7	4	2	0			

Consumer Council for Water – 2007/08 Customer Satisfaction Survey Questionnaire

INTRODUCTION

Good morning/afternoon. My name is … and I am calling from FDS International an independent research consultancy. We are conducting a survey about water and sewerage services on behalf of the Consumer body for the water industry who provide a voice for customers of water/sewerage companies.

The survey should take approximately 15 - 20 minutes and is intended to help ensure that you get a good service from your water company. If you would like to make an appointment please advise when a suitable time to call back would be.

This call may be monitored as part of our quality control procedures.

READ OUT IF NECESSARY
We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict market research codes of conduct.

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: Q1. Are you the water bill payer in your household? **SINGLE CODE**		
Yes	1	Q3
No	2	Q2
Don't know	3	Q2
ASK IF CODED 2 OR 3 AT Q2 Q2. Do you feel you have enough knowledge to answer questions about your water supply? **SINGLE CODE**		
Yes	1	Q3
No	2	
Don't know	3	

INTERVIEWER NOTE: If no/don't know at Q2 ask if there is somebody else in the household who is the bill payer or has enough knowledge to answer questions about the water supply. If yes, interview that person. If no, thank and close		

	Col	Route
Q3 Do you or any member of your family work in: **READ OUT**		
The water industry i.e. work for a water company	1	Thank and close
A consumer organisation e.g. Energy watch Which?, Citizens Advice Bureau	2	
Market Research	3	
None of the above	4	Q4
Q4a Who is your water company? (This may be a company which deals with your sewerage too.) **SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY**		
Anglian Water Services Ltd	1	Q5
Dwr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Water only companies		
Bournemouth & West Hampshire Water Plc	11	Q4b
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	
Dee Valley Water Plc	15	
Essex & Suffolk Water	16	
Folkestone & Dover Water Services Ltd	17	
Hartlepool Water Plc	18	
Mid Kent Water Plc	19	
Portsmouth Water Plc	20	
South East Water Plc	21	
South Staffordshire Water Plc	22	
Sutton & East Surrey Water Plc	23	
Tendring Hundred Water Services Ltd	24	
Three Valleys Water Plc	25	
Don't know	99	All respondents to check and arrange

	call back

	Col	Route
IF CODE 11-25 AT Q4A, ASK Q4B. ALL OTHERS GO TO Q5.		
Q4b And who is your sewerage company? And if necessary, the bill from your water company should also say who provides your sewerage services.		
SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY		
Water and Sewerage Companies		
Anglian Water Services Ltd	1	
Dwr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Don’t know	11	

SECTION A COMPANY INFORMATION – ASK ALL	Col	Route
I'd now like to ask you a few questions about your water and sewerage services.		
Q5 How far do you agree or disagree that the bill you receive for water and sewerage service is clear and understandable? **SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
Q6 How satisfied or dissatisfied are you with the value of money from the <u>water services</u> in your area? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
Q7 How satisfied or dissatisfied are you with the value for money from the <u>sewerage services</u> in your area? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
ASK ALL DISSATISFIED (CODED 4 OR 5) AT Q6 AND/OR Q7 Q8 Why do you think you don't get value for money for your Water and/or sewerage services? **PROBE FULLY & WRITE IN**		
Open (specify) ______________________________	1	Q9
Don't know	99	

ASK ALL Q9 How satisfied or dissatisfied are you with the value for money from services such as…?: **READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* a) Your energy supplier (gas and electricity) b) Your telephone landline supplier c) Council Tax		
ASK ALL Q10 How much do you agree or disagree that the water and sewerage charges that you pay are fair? **SINGLE CODE**		
Strongly agree	1	Q12
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	Q11
Strongly disagree	5	
Don't know	99	Q12
Q11 Why do you think that the water and sewerage charges that you pay are unfair? **PROBE FULLY & WRITE IN**		
Open (specify) ______________________	1	Q12
Don't know	99	
Q12 How much do you agree or disagree that the water and sewerage charges that you pay for are affordable to you? **SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
Q13 If you were given the opportunity, would you want to change your supplier of water and sewerage services? SINGLE CODE		
Yes	1	Q14
No	2	Q16
Don't know	99	Q16

ASK ALL CODED 1 AT Q13. OTHERS GO TO Q16. Q14 Why do you say you would consider changing your supplier? **PROBE FULLY & WRITE IN** Please specify ____________________ Don't know	1 9	
Q15 Would you still want the option of choosing your water and sewerage supplier even if making it possible for customers to choose suppliers meant some customers' bills went up? Yes No Don't know	1 2 99	

SECTION B CONSUMER RIGHTS & RESPONSIBILITIES	Col	Route
ASK ALL Q16 Were you aware that…? **SINGLE CODE FOR EACH STATEMENT** Scale: 1=Yes, 2= No, 99= Don't know a) You can pay your water & sewerage bill in instalments e.g. monthly. fortnightly or weekly b) You can pay for your water and sewerage bill by Direct Debit c) You can talk to your water company if you have a problem paying your bill		
Q17 Does your household have a water meter? SINGLE CODE		
Yes	1	Q19
No	2	Q18
Don't know	99	Q18
ASK ALL CODED 2 OR 99 AT Q17 (ALL UNMETERED RESPONDENTS) Q18 Were you aware that …: SINGLE CODE FOR EACH STATEMENT Scale: 1=Yes, 2= No, 99= Don't know a) You can have a water meter fitted free of charge b) If you have requested to have a water meter fitted, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can revert to your original water rate charge for your property. At no point are any extra charges made for trialling this service.		
INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is charged for water via a meter you cannot revert to non-metered charges.		
ASK ALL Q19 Are you aware of or are you currently on the Vulnerable Groups tariff? This was introduced to help people in low income groups who need to use a lot of water **READ OUT. SINGLE CODE**		
Yes, have heard of it but do not need it	1	
Yes, have subscribed to it	2	
No, but would like to know more	3	
No, but do not need it	4	
Don't know	99	

INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		
Q20 Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply. **READ OUT. SINGLE CODE** Yes, have heard of it but do not need it Yes, have subscribed to it No, but would like to know more No, but do not need it Don't know	 1 2 3 4 99	
INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		
Q21 Who do you think is responsible for maintaining the <u>water pipes</u> at your property? (If necessary state that you are asking about the water pipes up to the boundary of their property) **DO NOT READ OUT. SINGLE CODE** I am/the householder/landlord/organised through my insurance The Local Council The water company Other Don't know	 1 2 3 4 99	
INTERVIEWER NOTE: If asked after taking response, the correct answer is that the homeowner is responsible for the maintenance of water pipes at their home up to the boundary of their property (i.e. where the property meets the public highway) if the property was built after 1937.		
Q22 Who do you think is responsible for maintaining any <u>sewerage pipes</u> and drains at your property? **DO NOT READ OUT. SINGLE CODE** I am/the householder/landlord/organised through my insurance The Local Council The water/sewerage company Other Don't know	 1 2 3 99	
INTERVIEWER NOTE: If asked after taking response, the correct answer is that the homeowner is responsible for the maintenance of sewerage pipes and drains at their home up to the point they meet the main sewer.		

	Col	Route
Q23 Were you aware that if your water and/or sewerage company fails to meet certain customer service standards for reasons within their control you may be entitled to compensation? **SINGLE CODE**		
Yes, was aware	1	
No, was not aware	2	
Don't know	99	
INTERVIEWER NOTE: If asked, information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company		
Q24 Have you contacted your water company to make an enquiry in the past 12 months? **SINGLE CODE**		
Yes	1	Q25
No	2	Q27
Don't know	99	
Q25 Why did you contact your water company? **DO NOT READ OUT. MULTICODE**		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	
Billing enquiry	4	Q26
Other (please specify)	5	
Don't know	99	

Q26 Thinking about your contact with your water company, overall how satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE**		
The ease of contacting someone who was able to help you	1	
The quality/ clarity of information provided	2	
The knowledge and professionalism of staff	3	
The feeling that your call had been, or would be, resolved	4	
The way that the water company has kept you informed of progress with your enquiry *(and /or)* claim	5	

DO NOT ASK THOSE CODED 1 AT Q25 Q27 Have you made a complaint to your water and sewerage company in the past 12 months? **SINGLE CODE**		
Yes	1	Q28
No	2	Q33
Don't know	99	
ASK ALL CODED 1 AT Q25 AND ALL CODED 1 AT Q27 Q28 How satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 99= don't know* **READ OUT EACH STATEMENT & SINGLE CODE**		
a) The speed of response to your complaint		
b) How well the company dealt with your concerns		Q29
c)Action taken as a result of your complaint to prevent the problem re-occurring		

Q29 Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled? **SINGLE CODE**		
Very satisfied	1	Q31
Fairly satisfied	2	Q31
Neither satisfied nor dissatisfied	3	Q30
Fairly dissatisfied	4	Q30
Very dissatisfied	5	Q30
Don't know	99	Q31
ASK ALL CODED 3,4 OR 5 AT Q29. OTHERS GO TO Q31. Q30 How would you have changed the way that your complaint was dealt with? **PROBE FULLY & WRITE IN**		
Please specify ____________________	1	Q31
Don't know	99	

ASK ALL CODED 1 AT Q24 or Q27. Q31 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water company? **SINGLE CODE**		
Very satisfied	1	Q33
Fairly satisfied	2	Q33
Neither satisfied nor dissatisfied	3	Q32
Fairly dissatisfied	4	Q32
Very dissatisfied	5	Q32
Don’t know	99	Q33
ASK ALL CODED AS 3, 4 OR 5 AT Q31. OTHERS GO TO Q33 Q32 You weren’t satisfied, please could you say why? **PROBE FULLY & WRITE IN**		
Please specify	1	
Don’t know	99	

SECTION C – WATER ON TAP	Col	Route
ASK ALL Q33 How satisfied are you with the following aspects of your water supply: **READ OUT EACH STATEMENT & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.*		
The colour and appearance of your tap water	1	
Taste and smell of tap water	2	
Hardness/softness of your water	3	
The safety of your drinking water	4	
The reliability of your water supply	5	
Your water pressure	6	
Q34 Taking all those aspects into account, overall how satisfied or dissatisfied are you with your water supply? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
Q35 If you could make one single improvement to the overall service provided by your water company what would it be? **PROBE FULLY & WRITE IN**		
Please specify	1	
____________________		
Don't know	99	
Q36 Do you think that your service has got better, worse, or stayed the same over the past year? **SINGLE CODE**		
Much better	1	
Slightly better	2	Q37
About the same	3	
Slightly worse	4	
Much worse	5	
Don't know	99	Q38

Q37 Why do you think the service has been (better/worse)? **PROBE FULLY & WRITE IN** Please specify __________________________ Don't know	1 99	Q38
ASK ALL Q38 Which of the following do you think is better for you? **READ OUT. SINGLE CODE** Tap water Bottled water Both equally as good for you Don't know	1 2 3 99	
ASK ALL Q39 How much do you agree or disagree with the following statement: Scale 1=strongly agree, 2=Tend to agree, 3=neither agree nor disagree, 4=Tend to disagree, 5=strongly disagree, 99=don't know **READ OUT EACH STATEMENT AND SINGLE CODE** a) I usually drink tap water rather than bottled water b) Everyone needs to do what they can to reduce the waste of water		
ASK ALL CODED AS 1OR 2 AT Q39 B. OTHERS GO TO Q40 Q39c What actions, if any, have you and your household taken to reduce wasteful use of water? **DO NOT READ OUT. MULTICODE.** Having a water meter installed Taking showers instead of baths Water efficient shower/shower-head Energy & Water efficient dishwasher Energy & Water efficient washing machine Trigger device fitted to hosepipe Hippo/Save A Flush device in toilet cistern Lag pipes to protect against bursting Water butts in garden Turn off tap when brushing teeth Wait until full load for Washing Machine / dishwasher Only put required amount in kettle Reusing water e.g. bath water Share shower/bath Other (specify) None Don't know	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 99	

	Col	Route
Q40 How have you been made aware, if at all, of any campaigns to use water wisely in the past 12 months? How were you made aware of campaigns to use water wisely? **READ OUT. MULTICODE.**		
Television	1	
Billboards	2	
Radio	3	
Leaflets	4	
Mail from water companies	5	
Newspapers/magazines	6	
Other (please specify)	7	
Not aware of any campaigns to use water wisely	8	
Don't know	99	
SECTION D – CLEANING UP	Col	Route
Q41 Which of the following do you think are acceptable to dispose of down the toilet, sink or drain? **READ OUT. MULTICODE**		
Fats/cooking oils	1	
Nappies	2	
Sanitary towels	3	
Tampons	4	
Razors	5	
Cotton buds	6	
Condoms	7	
Motor oil	8	
None of these	9	
Don't know	99	
INTERVIEWER NOTE: If asked, none of these are acceptable		
Q42 What do you think happens to the waste water that goes down the toilet/sink in your property? **DO NOT READ OUT. MULTICODE**		
Cleaned at treatment sites	1	
Goes direct to the sea	2	
Goes direct to rivers	3	
Nothing	4	
Other (specify)	5	
Don't know	99	

INTERVIEWER NOTE: If asked, waste water is cleaned at treatment sites, undergoing several stages of treatment before being released back into the environment		
Q43. How satisfied are you with your sewerage company's management of the following aspects of their sewerage service: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT AND SINGLE CODE** a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning waste water properly before releasing it back into the environment d) Minimising sewer flooding		
Q44 Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
Q45 If you could make one single improvement to the overall service provided by your sewerage company what would it be? **PROBE FULLY & WRITE IN**		
Please specify ____________________	1	
Don't know	99	

SECTION E – SPEAKING UP FOR WATER CONSUMERS	Col	Route
Q46 Who would you contact if you had a problem with your water or sewerage services? **DO NOT READ OUT. SINGLE CODE**		
My water or sewerage company	1	
My local council	2	
My landlord	3	
Ofwat	4	
A consumer body/ the consumer council for water	5	
Other (specify)	6	
Don't know	99	
Q47 Do you know the name of the consumer body for the water industry?		
Yes (specify)	1	
No	2	Q47a
Don't know	99	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q47. OTHERS GO TO Q48 Q47a Had you heard of the Consumer Council for Water before now?		
Yes	1	Q48
No	2	Q49
Don't know	99	Q49
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q47, OR CODED 1 AT Q47a. OTHERS GO TO Q49 Q48 What, if anything, do you know about the Consumer Council for Water? **DO NOT READ OUT. MULTICODE**		
Water Company	1	
Consumer Body/provides a voice for consumers	2	
Does consumer research	3	
Part of Ofwat, the regulators	4	
A government agency	5	
Regulatory body for water sector	6	
Other (specify)	7	
Nothing/not sure	99	

READ OUT: The Consumer Council for Water was set up in October 2005 to represent customers of water and sewerage companies in England and Wales. The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to get (and be able to recognise that they are getting) high standards and good value for money in water and sewerage services, comparing well with the best of other service sectors.		
ASK ALL Q49 The Consumer Council for Water is interested in establishing how valuable its services are to the public. How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive? **READ OUT**		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don't know	99	
Q50 If you wanted to get in touch with the Consumer Council for Water what would be your preferred method of contact? **DO NOT READ OUT. SINGLE CODE**		
Post/letter	1	
Email	2	
Telephone	3	
Via the CCWater website	4	
In person	5	
Other specify	6	
Don't know	99	
Q51 Have you had reason to contact the Consumer Council for Water in the last year?		
Yes	1	Q52
No	2	Q54
Don't know	99	Q54
Q52 What did you last make contact about? **DO NOT READ OUT SINGLE CODE**		
To ask for information	1	
To comment on a service received	2	
To make a complaint	3	Q53
Billing enquiry	4	
Other specify	5	
Don't know	99	

Q53 Thinking about your contact with the Consumer Council for Water, overall how satisfied were you with: *Scale: 1= very satisfied, 2= fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE** a) The ease of contacting someone who was able to help you b) The quality/clarity of information provided c) The knowledge and professionalism of staff d) The feeling that your call had been, or would be, resolved e) The way that the water company has kept you informed of f) progress with your enquiry *(and /or)* claim		Q54
ASK ALL Q54 How much do you agree or disagree with the following statements about the Consumer Council for Water? *Scale 1=strongly agree, 2=tend to agree, 3=neither agree nor disagree, 4=tend to disagree, 5=strongly disagree, 99=don't know* **READ OUT EACH STATEMENT & SINGLE CODE** I have seen references to CCWater or CCWater press notices. I know how to contact CCWater if I have a problem or need advice. I rate CCWater as being effective in representing my views	 1 2 3	
Q55 What is your preferred source for information relating to your water and sewerage services? **DO NOT READ OUT. SINGLE CODE** Consumer Organisation mailings Face to face with Consumer Organisation staff Consumer Council for Water website Local press Inserts or leaflets with water & sewerage bills Radio / Television Environment Agency Ofwat Internet Word of mouth / businesses, etc. Citizen's Advice Bureaux Leaflets through the door Local authority Other (please specify) Don't know	 1 2 3 4 5 6 6 7 8 9 10 11 12 13 99	

SECTION F – BACKGROUND – ASK ALL	Col	Route
For all respondents:		
Q56 Please record the gender of the respondent **DO NOT ASK**		
Male	1	
Female	2	
Q57 Which of the following age groups do you fall into? **READ OUT SINGLE CODE**		
18-24	1	
25-34	2	
35-44	3	
45-60	4	
61-74	5	
75+	6	
Refused	7	
Q58 How would you describe your ethnic background? **DO NOT READ OUT SINGLE CODE**		
White: British	1	
White: Irish	2	
White: Any other White background	3	
Mixed: White and Black Caribbean	4	
Mixed: White and Black African	5	
Mixed: White and Asian	6	
Mixed: Any other Mixed background	7	
Asian or Asian British: Indian	8	
Asian or Asian British: Pakistani	9	
Asian or Asian British: Bangladeshi	10	
Asian or Asian British: Any other Asian background	11	
Black or Black British: Caribbean	12	
Black or Black British: African	13	
Black or Black British: Any other Black background	14	
Chinese	15	
Other	16	
Refused	17	

	Col	Route
Q59 How would you describe the composition of your household? **READ OUT SINGLE CODE**		
One person household	1	
Married couple household	2	
Cohabiting couple household	3	
Lone parent household:		
- with dependent children (under 16)	4	
- with non-dependent children only (16+)	5	
other (specify)	99	
Q60 What is the occupation of the main income earner in your household? **CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS. SINGLE CODE**		
A – Very senior managerial positions (large organisations) and professional occupations	1	
B – Senior managerial; business owners. Middle management in large organisations	2	
C1 – Small employers; junior management and other non-manual occupations	3	
C2 – Skilled manual workers e.g. served apprenticeships, special qualifications or certificates	4	
D – Semi skilled and unskilled workers	5	
E – Casual workers; unemployed and otherwise not working	6	
Refused	99	
Q61 What is the total annual income of your household (before tax) **READ OUT SINGLE CODE**		
Less than £10,000	1	
£10,000 - £19,999	2	
£20,000 – £29,999	3	
£30,000 - £39,999	4	
£40,000 - £49,999	5	
£50,000 - £59,999	6	
£60,000 or more	7	
Don’t know/refused	99	

Q62 What type of accommodation do you live in? **READ OUT SINGLE CODE**		
Owner occupied	1	
Private rental	2	
Council tenant	3	
Housing Association tenant	4	
Leaseholder	5	
Don't know/refused	99	

Q63 Would you say you live in an urban or rural area? **SINGLE CODE**		
Urban	1	
Rural	2	
Suburban/semi rural	3	
Don't know	99	

Thank you for sparing the time to take part.

This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.

Should you wish to contact the Consumer Council for Water you can call their national enquiries line on 0845 039 2837 **or visit their website at www.ccwater.org.uk**

Should you want to contact the MRS (the Market Research Society) to verify that FDS International Ltd comply with the code of conduct you can call them on 0500 39 69 99.