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Water Matters

Household customers' views on their water and sewerage services 2014

Report prepared for:

Consumer Council for Water

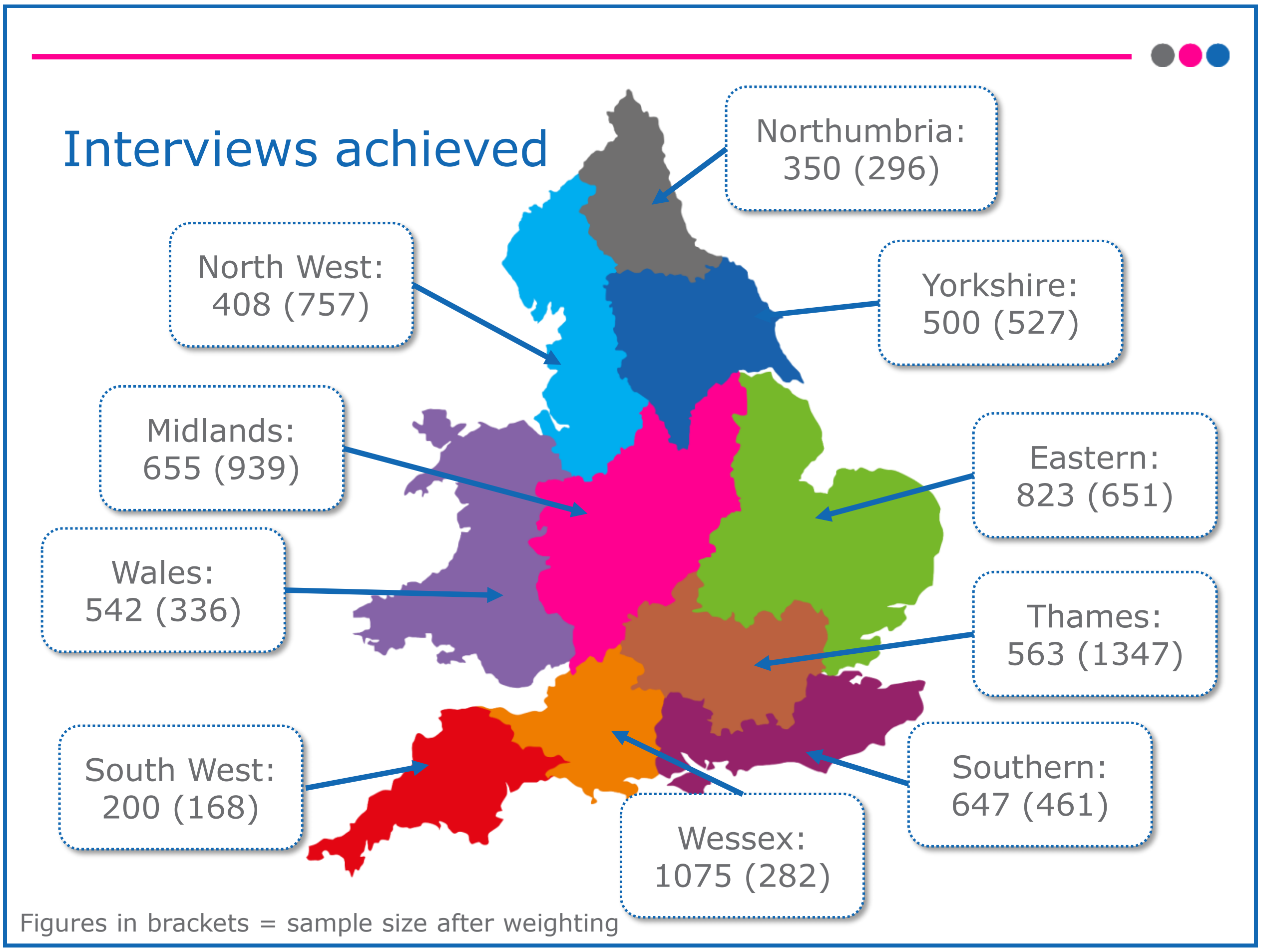
August 2015

Contents

Charts and tables

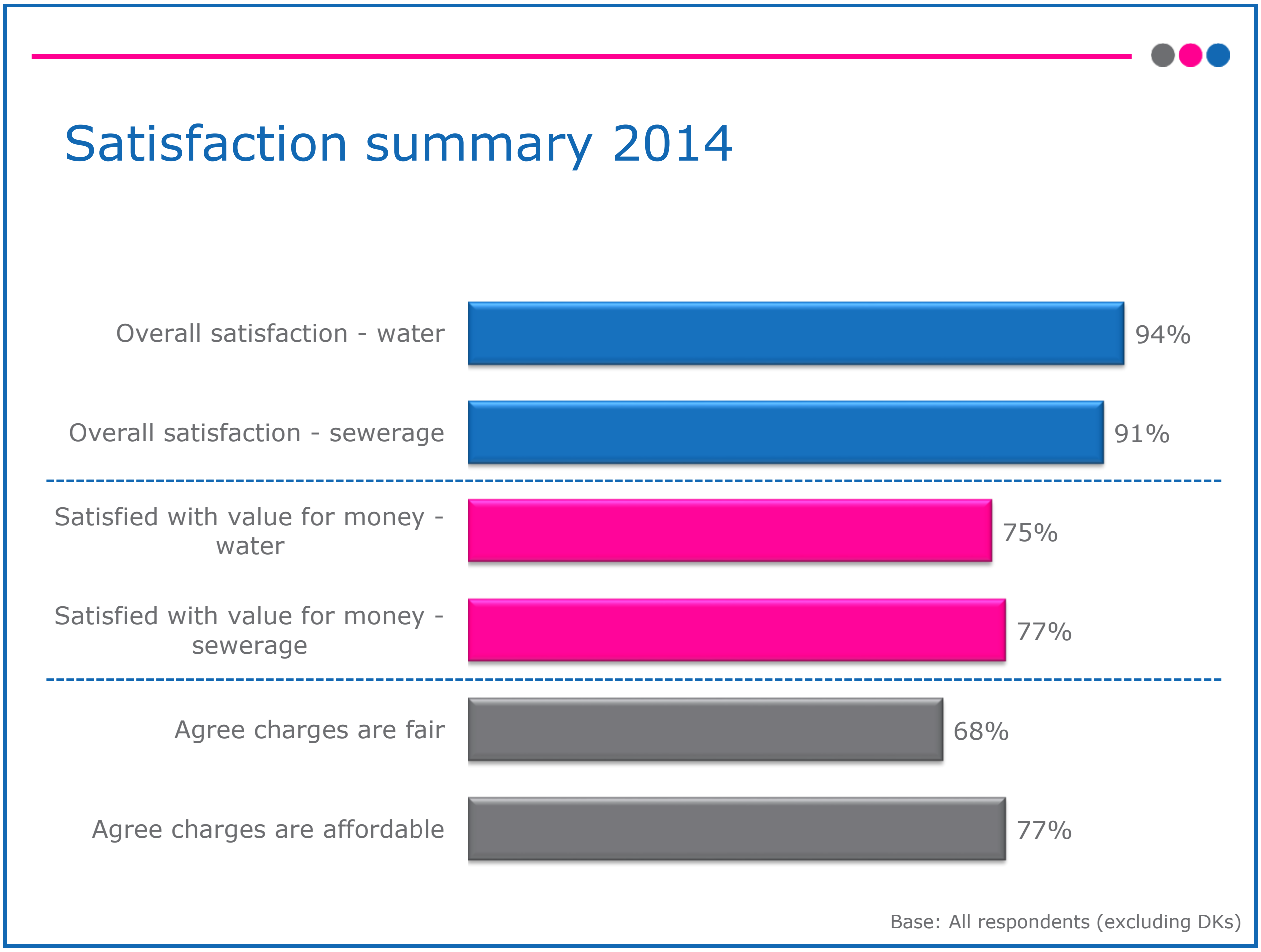
Executive Summary

- This survey has been commissioned annually by the Consumer Council for Water (CCWater) since 2006 to identify household customers' views on their water and sewerage services in England and Wales and track changes in these views over time.
- A total of 5,763 telephone interviews were conducted with household water and sewerage bill payers across England and Wales between the 28th November 2014 and the 15th February 2015. At least 200 interviews were carried out with customers of each Water and Sewerage Company (WaSC) and 150 with customers of each Water only Company (WoC).
- 449 interviews were conducted with mobile only households (do not have a landline at all or have a landline for broadband but don't use it for telephone calls) and 5,314 were conducted with households using a landline.



Key findings

Figure 1: Satisfaction summary 2014



Overall satisfaction with water and sewerage services is very high, and improving

- In 2014, 94% are satisfied overall with their water supply, slightly higher than in 2013 (93%).
- Overall satisfaction with sewerage services has increased significantly from 87% in 2013 to 91% in 2014.

Satisfaction with value for money is also on the increase

- The downward trend seen since 2010 in satisfaction with value for money of water services has been reversed, with three-quarters (75%) of customers now being satisfied (up from 69% in 2013).
- The same is true for sewerage services where satisfaction levels are now 77% (up from 71% in 2013).
- To put the water industry figures in context, customers are also more satisfied with the value for money of all other household services (except council tax). Energy services in particular have seen a marked increase in satisfaction and are now slightly higher than the water industry (80% electricity and 79% gas).

More customers feel that the charges they pay are fair and affordable

- Perceptions of fairness are now at 68%, up from 54% in 2013. This follows a sharp fall from 2012 to 2013.
- Agreement that bills are affordable is now 77%, up from 67%. Perceptions of affordability and fairness are the highest since this survey began in 2006.
- And if they were worried about their bills, 76% of customers say they would contact their supplier, a steep rise from 69% in 2013.

Certain customer groups are more negative about water and sewerage charges

- Vulnerable customers, such as those with disabilities or on benefits, consistently rate value for money, fairness and affordability lower than other customers. The same is true of ethnic minority households.
- Customers aged 30-59 are much more critical of charges than all other age groups.
- Housing association tenants compared to those living in other types of housing are also more critical about their bills.

Over 8 in 10 feel that their bills are clear

- Since bill clarity was last tested in 2011, there have been significant increases in agreement that bills are clear on how much needs to be paid and when (86% up from 79%) and how the final amount was reached (81% up from 73%).

Awareness of "Special Assistance" services continues to rise; awareness of all other optional services and charging options remains stable, or has fallen

- Awareness of "Special assistance" services continues to rise strongly each year (47% in 2014 up from 31% in 2013).
- 1 in 10 are aware of WaterSure/Welsh Water Assist, similar to the 9% in 2013
- In 2014, awareness of the free meter scheme has fallen back sharply (70% in 2013 to 60% in 2014) after previously increasing year on year, and the proportion knowing that they can be trialled for 12 months (36%) is on a gradual downward trend.
- Amongst unmetered households there has been a decrease in awareness of the free meter scheme from 62% in 2013 to 54% in 2014.
- And just 29% of unmetered customers are aware of the 12 month trial period, the same as in 2013.
- Awareness of the rebate given to customers if none of the rainwater that runs off a property drains into the public sewer has dropped from 23% in 2013 to 16% in 2014.
- Customers' awareness of the compensation scheme for service failures remains virtually unchanged at 42% compared to 43% in 2013.

Fewer customers are contacting their water company; those that do are more satisfied with contact handling

- Satisfaction with contact handling has improved each year from 2011 (69%) to 2014 (83%).
- There has been a significant increase in satisfaction with contact handling, from 78% in 2013 to 83% this year.

Most homeowners are aware of their water supply pipe responsibilities

- Nearly three-quarters (72%) of homeowners[1] know they are responsible for maintaining the water pipes within their property's boundary (76% in 2013).

Homeowners are still confused about responsibility for sewers and drains, but customers in general are better informed about what not to flush

- Just one third of homeowners (33%) identify their sewerage company as responsible for maintaining shared sewerage pipes although this proportion has increased significantly since 2013 (28%).
- More customers are correctly identifying that certain items should not be disposed of down the toilet, sink or drain (64% compared to 43% in 2013).

Water and sewerage service providers continue to be seen as more caring and trustworthy than energy suppliers

- Perceptions of both sectors have improved significantly since 2013, but water companies (75%) are still seen as caring more about the service they provide than energy companies (69%).
- Trust scores for both water companies and energy companies have also risen significantly since 2013, although water companies are still significantly ahead of energy companies (with a score of 7.82 out of 10 compared to 7.42)

Overall satisfaction levels with water, sewerage, gas, electricity and telephone landline services are now very similar

- Satisfaction with services has not only increased for water and sewerage companies, but for other utilities too.
- Very large increases in satisfaction for energy companies (electricity up to 93% from 81% and gas 92% from 80%) means that satisfaction levels for the water, energy and telephone landline sectors are now very similar (90% for telephone landlines to 94% for water).

Nearly half are very likely to recommend their water company

- Whilst there is no opportunity to change supplier for household customers in the water industry, customers were asked how likely they were to recommend their water company to friends or family in order to calculate a Net Promoter Score[2] (NPS); nearly half (45%) are very likely to recommend (scores of 9 or 10).

[1] Reported figures are based only on owner occupiers rather than all customers. Tenants are more likely to refer any issues to their landlord (Local Council, Housing Association or private landlord).
[2] NPS scores are based on the proportion of 'promoters' (those rating 9-10 on a 10 point scale) minus the proportion of detractors' (those rating 0-6). 'Passives' (rating 7-8) are excluded from the calculation. This means the higher the score, the more positive customers are. A negative score is possible where there are more detractors than promoters.

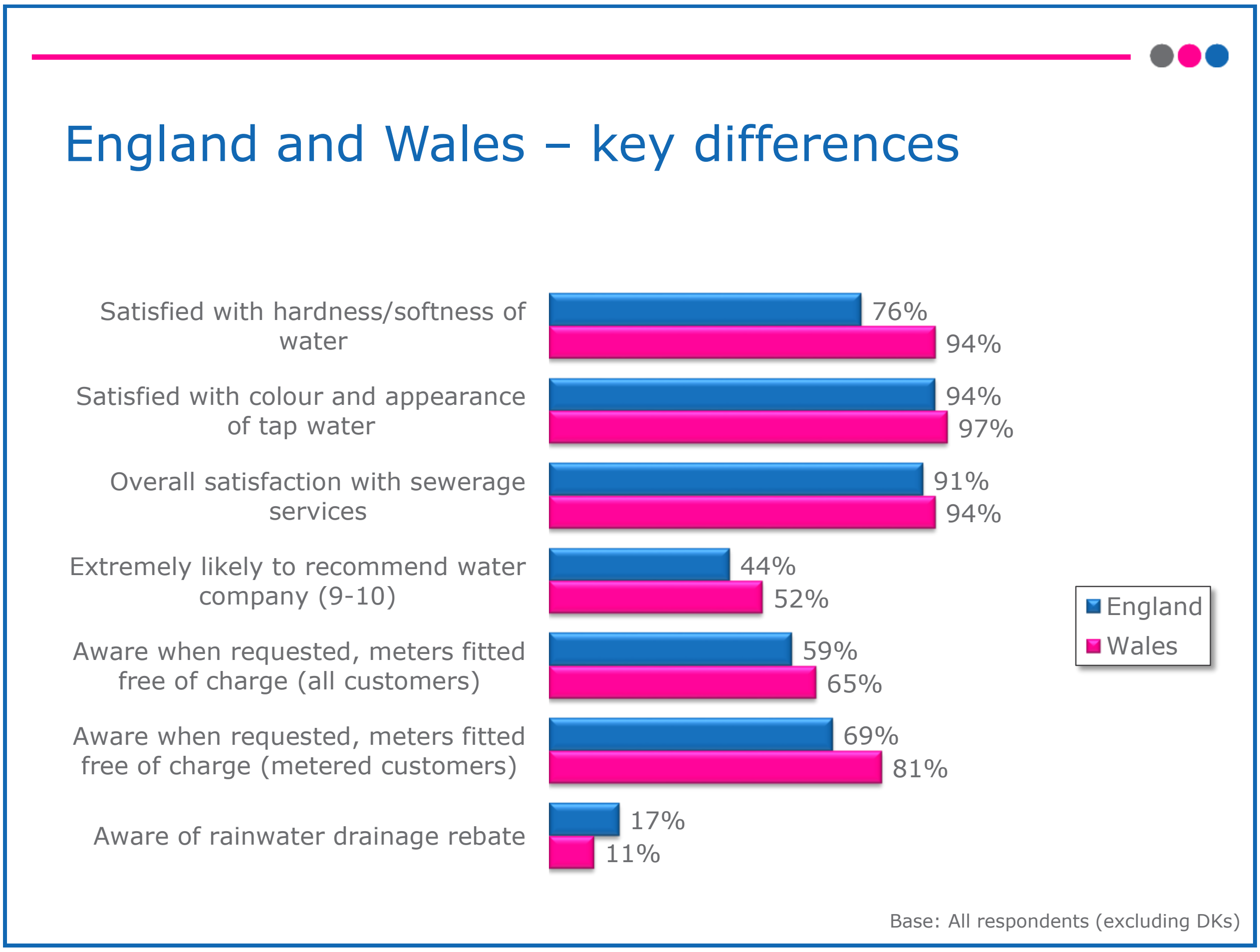
- The overall NPS for the water sector is +23; this means that the industry is generally seen positively by its household customers.

Awareness of the Ofwat price review

- Overall just under a quarter were aware of the industry price review (23%), with a peak in awareness (32%) in the week of the pricing announcements in December 2014.

Key differences in findings between customers in England and Wales

Figure 2: England and Wales: key differences



- In 2014, there are no significant differences between England and Wales in views on value for money, fairness and affordability. The lead in satisfaction Wales had over England in 2013 has disappeared, largely due to satisfaction with service increasing more in England than in Wales.
- Welsh customers are generally more satisfied with their water supply than those living in England; the significant differences in their views are related to the water itself rather than its supply. The biggest difference concerns the hardness/softness of water, where nearly all Welsh customers (94%) compared to just over three-quarters of English customers (76%) are satisfied. Welsh customers are also significantly more satisfied than English customers about the colour and appearance of tap water, the taste and smell and the safety of the drinking water, although the differences aren't as marked as for hardness/softness.

- Overall satisfaction with sewerage services is significantly higher in Wales than in England (94% compared to 91%), although there is no one aspect of the service which is driving this.
- Customers in Wales are significantly more likely to recommend their service provider than customers in England (52% compared to 44%), and less likely to give a negative recommendation (16% in Wales compared to 23% in England).
- Customers in Wales are more likely than those in England to know that they can request a meter free of charge (65% compared to 59%). This is more prevalent amongst metered customers in each country (Wales 81% compared with 69% for England) than unmetered customers (Wales 57% compared with 53% for England).
- Awareness of the rain water drainage rebate is significantly lower in Wales than in England (11% compared to 17%).

Key differences by cluster

- In 2013 cluster analysis was run on the data for the first time. Cluster analysis uses statistical techniques to segment customers into different groups depending on their answers.
- The four clusters are ''Very Satisfied' i.e. most satisfied with key measures, followed by the 'Neutral' and 'Unfair' clusters, and the 'Dissatisfied' cluster least satisfied.
    - Cluster 1 – "Very Satisfied" – 59% (46% 2013). This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster.
    - Cluster 2 – "Neutral" – 20% (24% 2013). Neutral to satisfied with value for money, services, affordability and fairness. Second largest cluster.
    - Cluster 3 – "Unfair" – 13% (14% 2013). Neutral or satisfied on all measures, but feel their charges are unfair.
    - Cluster 4 – "Dissatisfied" – 9% (16% 2013). This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied. The smallest cluster in 2014.

1. Introduction

1.1 Background

1.1.1 The Consumer Council for Water (CCWater) has been representing customers and consumers of the water and sewerage industry in England and Wales since October 2005. CCWater operates through five committees, four in England and one in Wales.

1.1.2 CCWater wants consumers to receive (and to be able to recognise that they receive) good value for money and high standards in water and sewerage services, comparing well with the best of other service sectors.

1.1.3 Monitoring consumer opinion towards water and sewerage services is essential for CCWater to be able to identify and represent customer views; this survey of household bill payers has therefore been conducted annually since 2006. CCWater research has identified **five key consumer priorities**, and each year their Forward Work Programme is built around these::

- **Value for money** – a fair, affordable price and charging system
- **Right first time** – problems sorted out quickly without difficulty
- **Water on tap** – a safe, secure, reliable supply of water, that is used wisely
- **A sewerage system that works** – responsible removal of sewage, prevent of sewer flooding and reduction in persistent smells from sewage treatment works
- **Speaking up for water consumers** – being influential in achieving improvements for consumers.

1.1.4 Each tracking survey provides valuable insights into customers' views on water and sewerage services over time. A comparison of the findings identifies and tracks any changes in customers' concerns about all aspects of water and sewerage services.

1.1.5 The survey was initially based on nine Water and Sewerage Company (WaSC) regions in England, and the Water and Sewerage Company region in Wales. Since 2012 the survey has also included the customers of Water only Companies (WoCs), so that company specific findings are available while maintaining comparisons between WaSC regions.

1.2 Research objectives

1.2.1 The overriding objectives of the research are, for each WaSC region and water company, to establish any changes to customer views over time and since the previous survey in 2013-14 thus allowing CCWater to:

- better understand customers' views about all aspects of water and sewerage services
- measure how customers' views change over time
- track customers' views on all aspects of water and sewerage services since the 2011/12 survey for each of the 23 water companies.

1.2.2 These findings will enable CCWater to:

- determine where CCWater has helped to add value or made an impact by measuring customer perception of service provision
- develop an effective communications strategy.

1.2.3 CCWater will use the research to:

- provide greater legitimacy in representing customers
- provide a stronger evidence base on which to make policy decisions
- gauge customers' concerns and satisfaction with delivery of water services
- develop CCWater's Forward Work Programme and Operational Business Plan.

1.3 Methodology

1.3.1 Telephone research was conducted with a random sample of households across England and Wales. Quotas controls were set according to the 2011 Census.

1.3.2 Respondents were responsible, either solely or jointly, for paying their household's water bill.

1.3.3 Fieldwork took place between 28 November 2014 and 15 February 2015. This included a pilot survey of 40 customers to review interview length and routing.

1.3.4 A total of 5,763 twenty minute interviews were completed. CCWater commissioned 200 interviews for each of the 10 WaSCs and 150 for the 13 WoCs which equates to 3,950 interviews.

1.3.5 Each water company was given the opportunity to boost interview numbers and seven companies did so:

- Anglian – 200 additional interviews
- Bristol – 300
- Dŵr Cymru Welsh Water – 200
- Severn Trent – 300
- United Utilities – 200
- Wessex – 300
- Yorkshire – 300

The additional interviews have been included in the overall report and incorporate the weighting factors applied to the total sample.

1.3.6 As a result of the large sample size for England and Wales, a change of one or two percent is statistically significant at the 95% confidence level (i.e. we can be 95% confident that the sample result reflects the actual population result to within the margin of error shown in Figure 3). Small but significant percentage changes for England and Wales since last year should therefore been considered in the context of longer term trends.

1.3.7 The questionnaire is similar to previous years, although it omits a few questions asked in previous surveys and includes a small number of new questions. This ensures that the survey addresses emerging issues as well as on-going ones that may be of interest to water customers.

1.3.8 The findings for each WaSC and WoC are not included in this report, but are published on CCWater's website: http://www.ccwater.org.uk/waterissues/himcd/

1.3.9 For ease of reference, where the text in the report refers to **water companies**, this means the collective of water and sewerage, and water only companies.

1.4 Analysis

1.4.1 Analysis has been undertaken at total sample level (England and Wales combined), by country (England versus Wales), and by WaSC region (customers of WoCs were assigned to a WaSC region according to their postcode).

1.4.2 The data are weighted to be representative of each WaSC region based on the 2011 census. Weighting this way adjusts for the differences in sample sizes between WaSC regions and enables level comparisons to be made. All charts show weighted data but give the unweighted base size.

1.4.3 Demographic analysis is included where sample sizes are large enough to allow for reliable comparisons. However, commentary on demographic differences has only been included if they are significant and felt to be meaningful.

1.4.4 As in previous years, comparisons are made between different WaSC regions. At a WaSC region level, weighting has been applied based on the total number of connections for sewerage services. This enables direct comparison with data in previous surveys.

1.4.5 The table below shows the statistical reliability for the total sample size and for each WaSC region.

Figure 3: Statistical reliability

	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	5763	0.77	1.18	1.29
England	5221	0.81	1.24	1.36
Wales	542	2.53	3.86	4.21
Eastern	823	2.05	3.13	3.42
Northumbria	350	3.14	4.80	5.24
Midlands	655	2.30	3.51	3.83
South West	200	4.16	6.35	6.93
Southern	647	2.31	3.53	3.85
Thames	563	2.48	3.79	4.13
North West	408	2.91	4.45	4.85
Wessex	1075	1.79	2.74	2.99
Yorkshire	500	2.63	4.02	4.38

1.4.6 During the fieldwork there was considerable media attention on water prices, especially on and immediately after 12th December when Ofwat announced its final pricing determinations for water company business plans. Analysis of different time periods related to before, during and after Ofwat's announcement has taken place and any significant differences highlighted in the report where relevant.

1.4.7 Significant differences have been highlighted on each chart in the form of an arrow – showing either an increase or a decrease: or

1.4.8 The sample was structured according to the Office of National Statistics (ONS) Census Data, 2011. Quotas were set for each water company, based on gender, age and socio economic classification (SEC) within each census region that the water company was situated.

1.4.9 Age groups this year are slightly different to previous years in order to reflect the revised 2011 census data bandings. They continue to fall into younger (18-29), middle (30-59) and older age ranges (60+). Comparisons aren't generally made between the age groups year on year, but where this does happen, this change should be borne in mind.

1.4.10 DJS Research undertook an omnibus survey of 1,000 with a representative sample for England and Wales in order to identify the proportion of younger bill payers in England and Wales. The survey discovered that only 27% of 18-29 year olds were responsible for paying their water bill. As a result, the age band quotas were adjusted accordingly.

1.4.11 The SEC[3] classifications used are:

1 - Higher managerial, administrative and professional occupations; lower managerial, administrative and professional occupations;

2 - Intermediate occupations; small employers and own account workers;

3 - Lower supervisory and technical occupations; semi-routine occupations; routine occupations;

4 - Never worked and long-term unemployed;

5 – Full-time students.

[3] SEG groupings used in previous years. Therefore comparisons have not been made with SEG based findings in earlier surveys.

1.5 Cluster Analysis

1.5.1 Cluster analysis was carried out on last year's results and repeated again this year. Cluster analysis uses statistical techniques to segment customers into different groups depending on how they respond to the following questions:

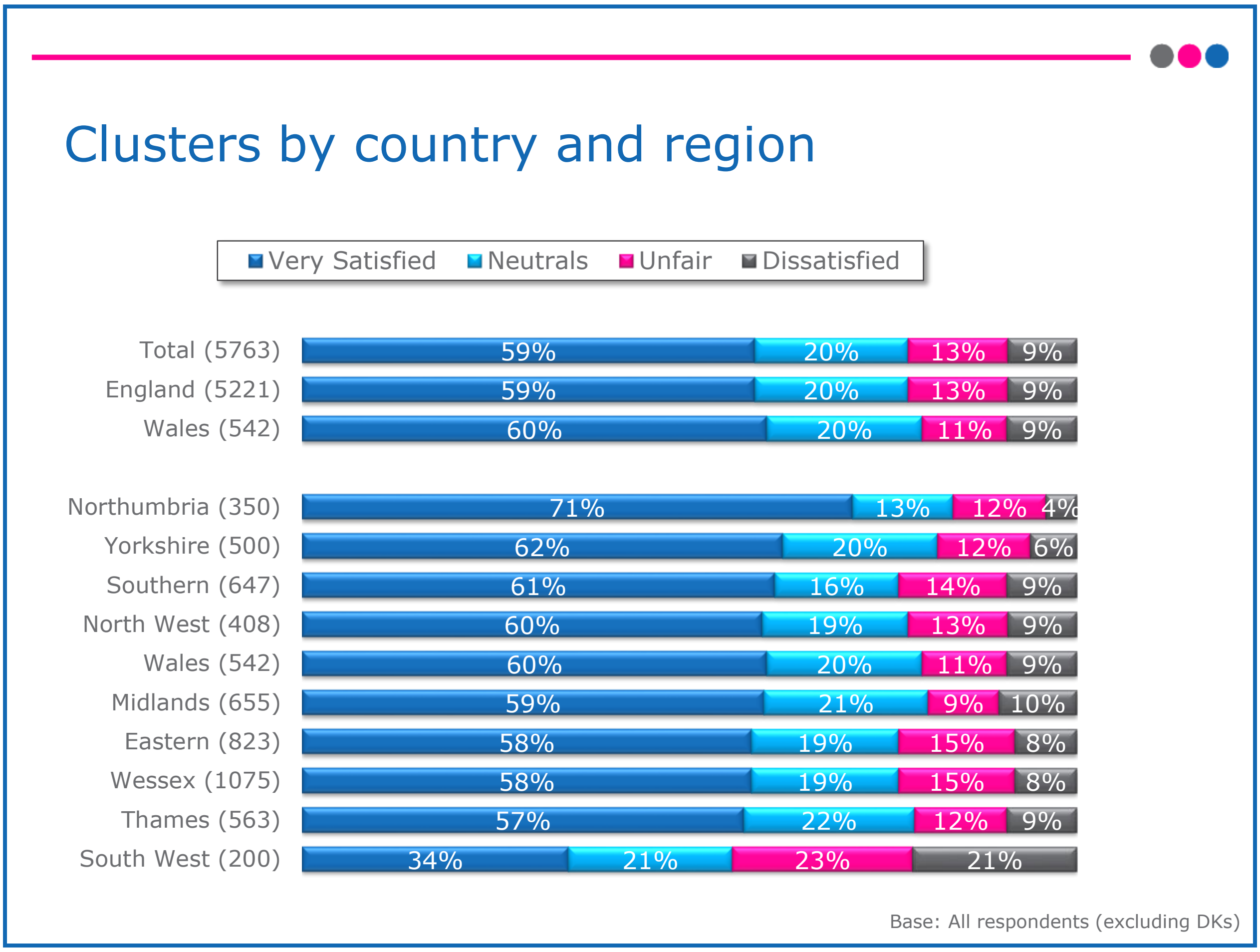
- Value for money for both water and sewerage services
- Overall satisfaction with water services and sewerage services;
- Affordability; and
- Fairness.

1.5.2 The cluster analysis has been re-run in 2014 using the same segmentation as in 2013 and the proportions for this year are as follows:

- Cluster 1 – "Very Satisfied[4]" – **59%** (46% 2013). This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster and a significantly bigger proportion of the customer base than in 2013.
- Cluster 2 – "Neutral" – **20%** (24% 2013). These customers feel neutral to satisfied with value for money, services, affordability and fairness. The second largest cluster and significantly smaller than in 2013.
- Cluster 3 – "Unfair" – **13%** (14% 2013). Neutral or satisfied on all measures, but feel their charges are unfair.
- Cluster 4 – "Dissatisfied" – **9%** (16% 2013). This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied. This was the third biggest cluster in 2013, but is the smallest in 2014 with a significantly smaller proportion of the customer base than last year.

[4] Names of clusters have been changed since last year to ensure clarity on what each cluster represents

Figure 4: Clusters by country and region



1.5.3 The main characteristics of each cluster are:

- The Very Satisfied cluster has a higher than average proportion of older customers (60+). Over a third (37%) are aged 60 or over compared to 28% in the Dissatisfied cluster and 30% of Neutrals.
- Those who are in the Dissatisfied cluster are more likely to be:
  - middle aged (45-59) compared to the total (40% vs. 34% of the total sample),
  - in Routine and Manual occupations (37% vs. 33% of the total);
  - claiming benefits (41% vs. 29% of the total)
  - and in households where at least one person has a disability or long term illness (36% vs. 26% of the total).

  This cluster also has a higher than average representation of ethnic minorities (17% vs. 10% of the total) and customers in this group are more likely to have children in the household, along with the Neutrals (39% and 38% respectively vs. 33% of the total).

- The only differentiating characteristic of the Unfair cluster is that it has a higher than average proportion of males (57% vs. 47% of the total).
- The Neutrals cluster has a slightly higher than average proportion of customers who are unemployed/students compared to the average (12% vs. 9%) and along with the

Dissatisfied cluster has a high proportion of households with children (38%) and on benefits (35%).

- Any differences within the clusters are highlighted throughout the report.

1.6 What's new?

1.6.1 This year, the research methodology has been refined to make the survey more inclusive and strengthen company level samples.

- Inclusion: For the first time, customers without landlines were included in the research. A target of 500 interviews was set with customers who describe themselves as not having a landline, or only using their landline for broadband purposes. These customers were contacted and interviewed on their mobile phones.

- Company level samples: This year, demographic quotas were set for each water company sample in line with 2011 regional census figures. The 2014 findings at total sample level have been validated by weighting this year's demographics to match those of the 2013 survey, and checking how this affected the findings on key metrics. Weighting in this way didn't affect results by more than +/- 1% and have not affected any significant differences at total sample level.

2. Value for money

This chapter covers customers' views on the charges they pay for the water and sewerage services they receive. These include value for money (a comparison with other household service providers is included), fairness, affordability and bill clarity.

Key trends

- The downward trend since 2010 in satisfaction with value for money of water services has been reversed; three-quarters of customers (75%) are now satisfied.
- The same trend is seen for sewerage services where satisfaction levels are now 77%.
- Perceptions of fairness (68%) and affordability (77%) are at their highest levels since this survey began in 2006.

Key changes since 2013

- All charging related measures (value for money, fairness and affordability) have increased significantly since 2013.
- Satisfaction with value for money has increased for both water (75% up from 69%) and sewerage services (77% up from 71%).
- All other household service providers, except councils, have also seen a significant increase in satisfaction with value for money; gas and electricity suppliers now score higher than water and sewerage services.
- Perceptions of fairness are now at 68% up from 54% and agreement that charges are affordable is now 77% up from 67%.
- Three-quarters (76%) would contact their supplier if they were worried about paying their bill, a steep rise from 67% in 2013.

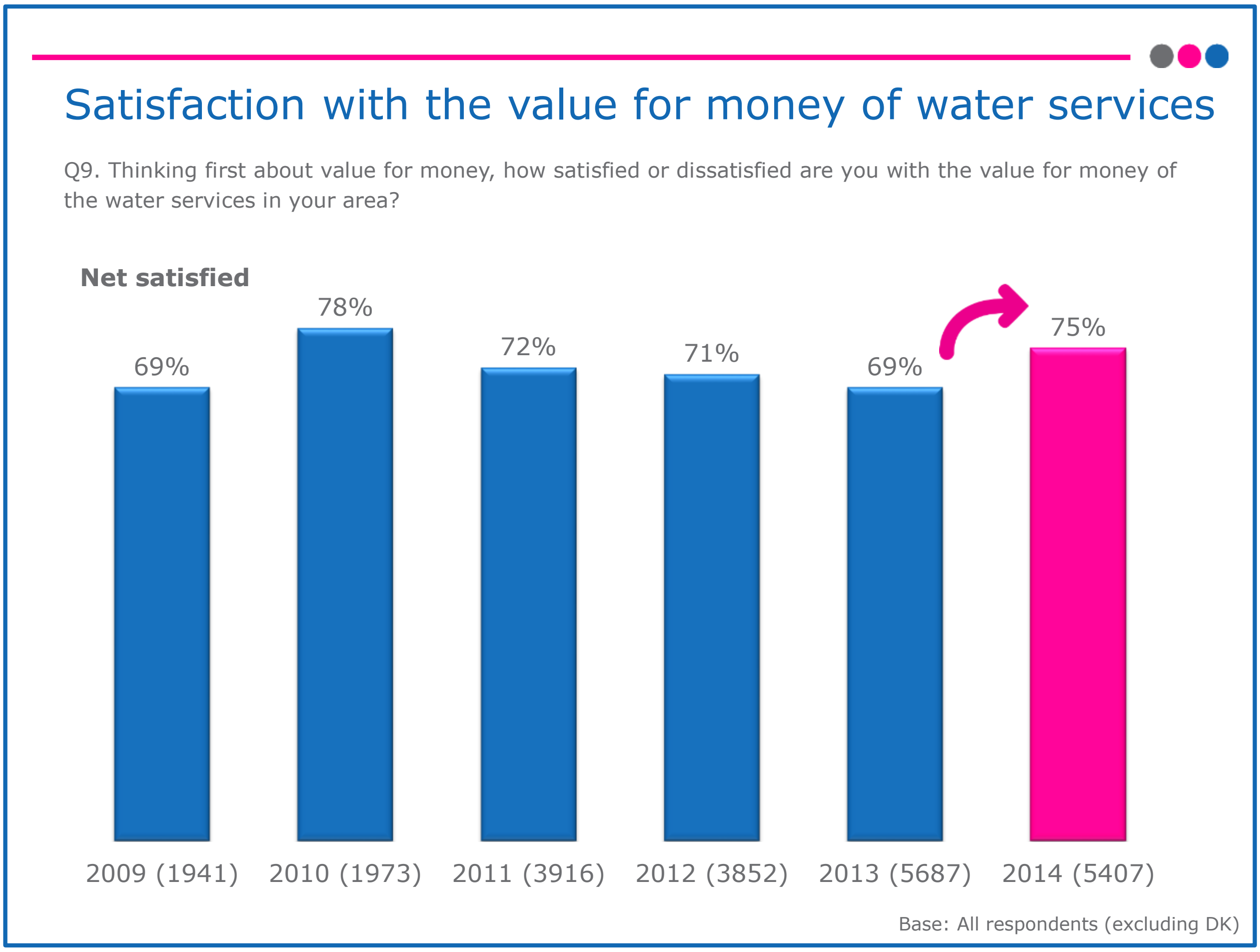
New questions

- Questions regarding bill clarity were last asked in 2011. Since that time there have been significant increases in agreement that it is clear how much needs to be paid and when (86% up from 79%) and how the final amount was reached (81% up from 73%).

2.1 Value for money of water services

2.1.1 Three-quarters of customers in England and Wales (75%) are satisfied with the value for money of water services, significantly up from 69% in 2013. This reverses the downward trend seen over the last three years. Intensity of satisfaction is also increasing, with a third of customers being "very satisfied" compared to just over a quarter (26%) in 2013.

Figure 5: Satisfaction with the value for money of water services



2.1.2 As in previous years, there is a strong link between value for money and overall satisfaction with water supply. Virtually all (99%) of those satisfied with value for money are also satisfied with their water supply.

2.1.3 Fewer customers are dissatisfied with value for money than in 2013 – a small but significant decrease from 14% to 12% in 2014. Dissatisfied customers are much more likely to have contacted their water company than not (21% compared to 11%). Dissatisfaction with contact strongly correlates with dissatisfaction with value for money (69% of those dissatisfied with their contact compared to 14% who were happy with their interaction).

2.1.4 Perceptions of value for money are exactly the same amongst metered and un-metered customers, a change from 2013 when customers on a meter were more satisfied than those who were not. However, there are differences amongst metered customers; those who requested a meter are significantly more satisfied with the value for money of water services than those who are not metered by choice (81% compared to 68% with a compulsory meter and 73% who already had a meter).

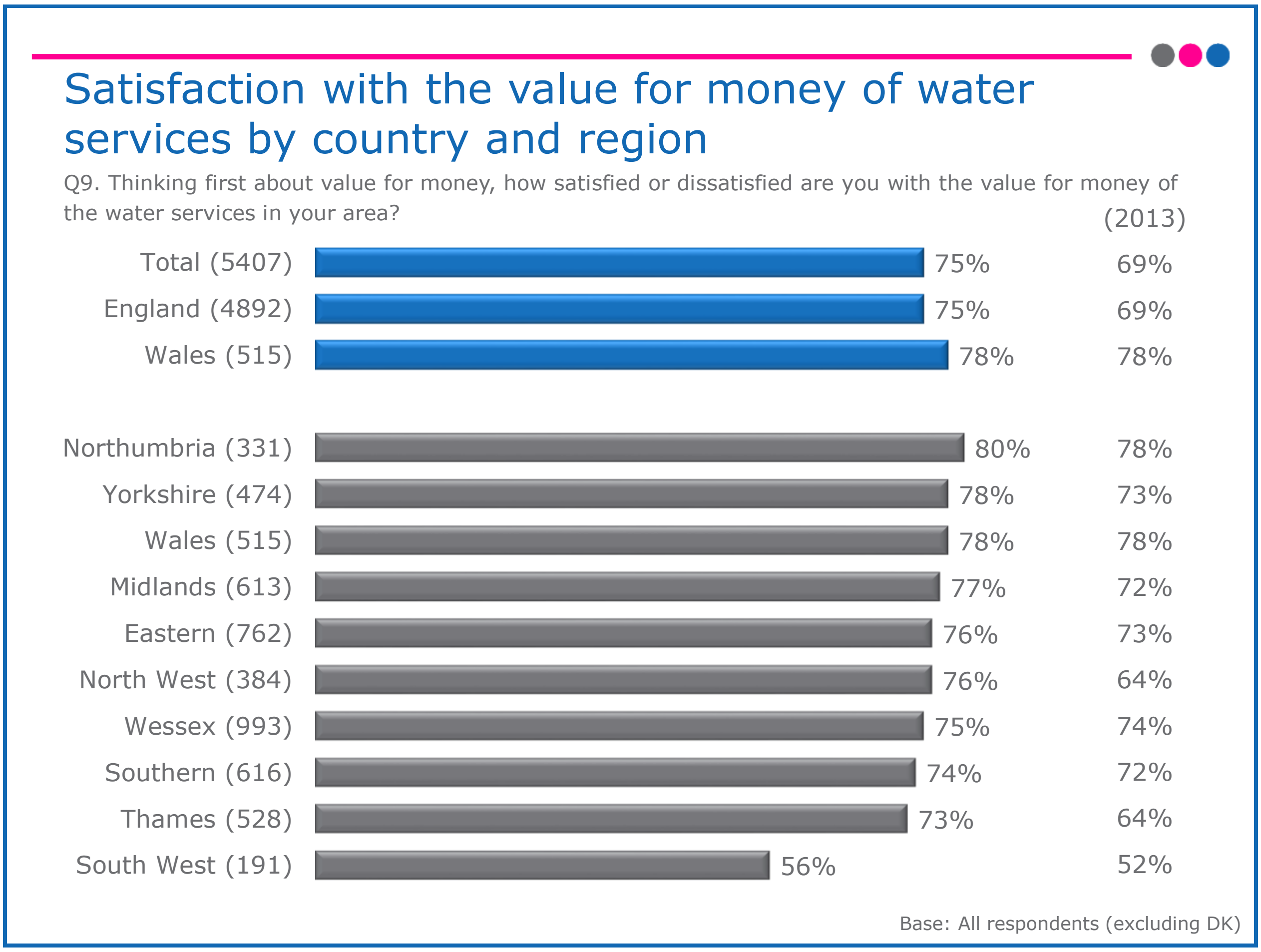
2.1.5 Satisfaction levels are now similar across England and Wales, whereas a year ago the Welsh were far more satisfied than the English. This is due to a significant rise in satisfaction amongst English customers since 2013 (from 69% in 2013 to 75%).

2.1.6 Across all WaSC regions the picture since last year is positive, with scores similar or better than 2013. Satisfaction is significantly higher than in 2013 in three regions: Midlands, North-West and Thames. Two WoCs achieved higher satisfaction with value for money scores than any of the WaSCs; Dee Valley (87%) and Hartlepool Water (85%).

2.1.7 Following on from previous years, customers in the South-West (where water and sewerage bills are historically higher than in the rest of England and Wales) are still much less satisfied than customers in all other regions and the gap is widening.

2.1.8 This is despite the Government contribution of £50 towards bills in the South West WaSC region, of which two-thirds are aware (66%). This compares with 69% in 2013.

Figure 6: Satisfaction with the value for money of water services by country and region



2.1.9 The customers who are most dissatisfied with the value for money of their water services are:

- People with disabilities (16%) or those with someone disabled in the household (15%) compared to customers with no disability (11%)
- Benefit recipients (16% compared with 11% not on any benefits)
- Those who would like to know more about WaterSure/Welsh Water Assist (28% compared with 10% of those who don't need it/have heard of it but don't need it)
- Housing associations tenants (19%), significantly more so than council (13%) or private renters (14%) and owner occupiers (11%)
- Those with children under 18 in the household (15% compared to 12% without children).

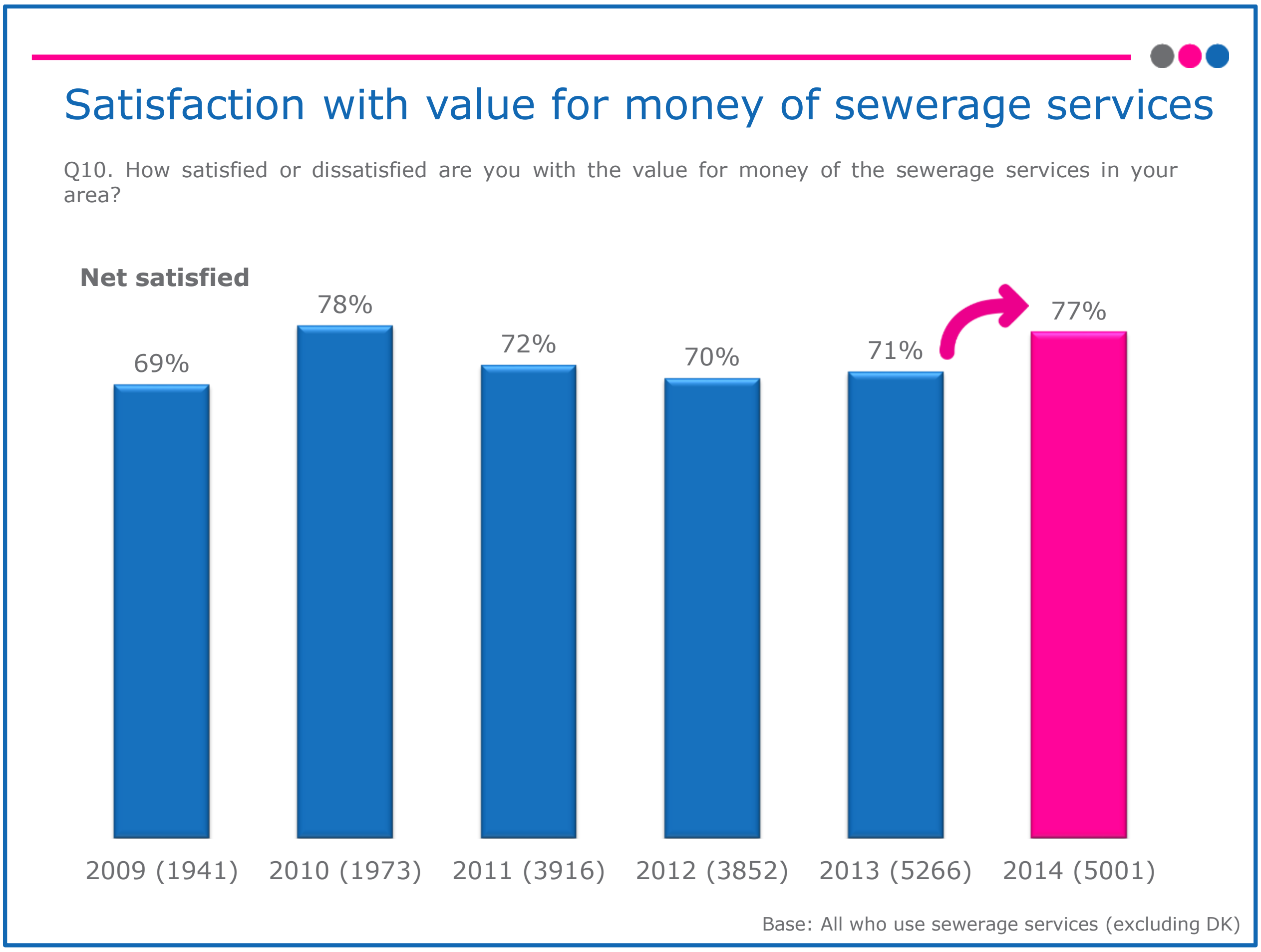
2.1.10 The very elderly (aged 75+) are the most satisfied with value for money. Customers at each end of the age spectrum are more satisfied than the middle-aged (18-29 77%, 60-74 78%, 75+ 85% compared with 30-44 71% and 45-59 72%).

2.1.11 In terms of the clusters, the Very Satisfied segment are most satisfied with the value for money of their water service (95%), whilst less than a third of the Dissatisfied and Unfair clusters feel this way (23% and 30% respectively). True to their name the Neutrals fall in between (62%).

2.2 Value for money of sewerage services

2.2.1 Over three-quarters (77%) of customers are satisfied with the value for money of their sewerage services, a significant increase on 2013 (71%), and almost back to the high of 78% seen in 2010. Satisfaction levels with water and sewerage services are both 6% higher in 2014 than in 2013. The proportion of very satisfied customers is now slightly over a third (34%), up from just over a quarter in the previous two years (26% in 2013 and 27% in 2012).

Figure 7: Satisfaction with the value for money of sewerage services



2.2.2 As in previous years and similar to water services, there is a strong link between satisfaction with sewerage service and value for money, with 92% of those satisfied with value for money also satisfied with their sewerage service overall. This figure is virtually the same as in 2013 (93%).

2.2.3 Only 1 in 10 customers are dissatisfied with the value for money of their sewerage service (10%). This compares with 12% in 2013.

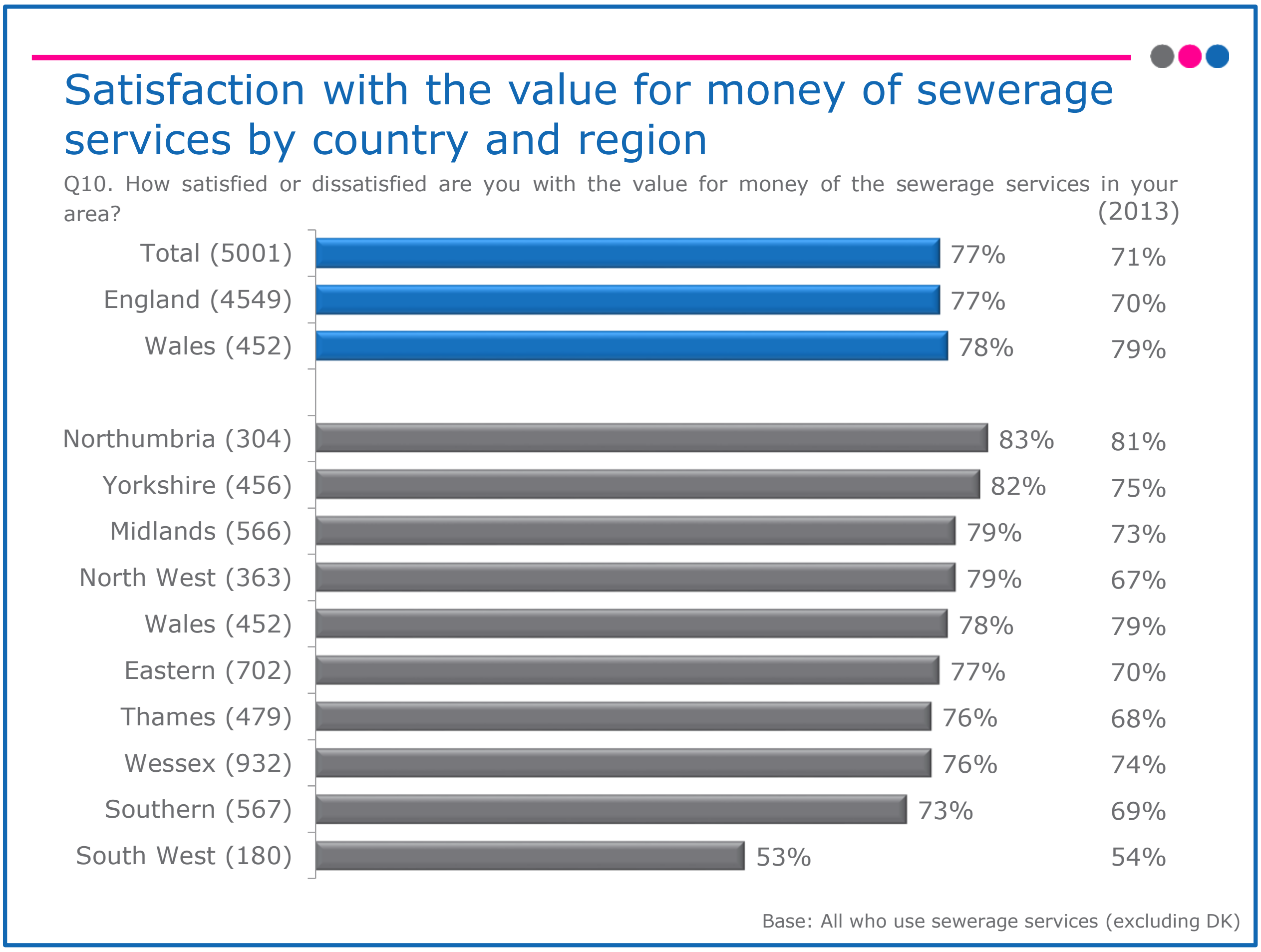
2.2.4 The correlation between contact and perceptions of value for money seen for water is repeated for sewerage services. The proportion of dissatisfied customers is much higher amongst those who have contacted their sewerage company than those who have not (20% compared to 9%). As with water services, dissatisfaction with contact is associated with very high levels of dissatisfaction with value for money (66% compared to 13% who were happy with their interaction).

2.2.5 Satisfaction with value for money of sewerage services is now on a par in England and in Wales due to a significant rise of 7% in the satisfaction levels of English customers.

2.2.6 Regionally, Wales and the South West are the only ones not to have seen an increase in satisfaction with value for money in 2014 compared to 2013, although the increases are only significant in three regions: Midlands, North West and Thames i.e. the same regions where rises were seen for value for money with water.

2.2.7 Customers in the Northumbria region continue to be the most satisfied with the value for money of their sewerage services (83%) and those in the South West the least satisfied (53%). The gap between the South West and other regions is widening and satisfaction levels are now 20% or more adrift of all the other regions.

Figure 8: Satisfaction with the value for money of sewerage services by country and region



2.2.8 The customers who are most dissatisfied with the value for money of their sewerage services are the same as for water services, namely:

- Those with disabilities or with someone disabled in the household (14% compared to 9% of non-disabled)
- Benefit recipients (13% compared to 9% not on any benefits)
- Those who would like to know more about WaterSure/Welsh Water Assist (19% compared to 9% of those who don't need it/have heard of it but don't need it)
- Renters compared to owner occupiers: housing associations tenants (16%), council renters (13%), private renters (12%) and owner occupiers (9%)
- 30-59 year olds (12%) compared to 8% of those aged 60-74 and 6% of those aged 75+

2.2.9 In terms of the clusters, the 95% of the Very Satisfied segment are satisfied with the value for money of their sewerage service compared to a third of the Dissatisfied and Unfair clusters (29% and 35% respectively). True to their name the Neutrals fall in between (66%).

2.3 Comparison of satisfaction with value for money of other household service providers

2.3.1 Customers were only asked to rate their satisfaction with other service providers if they actually received the service. The question wording was simplified in 2014 but by combining responses it has been possible to provide year on year comparisons.

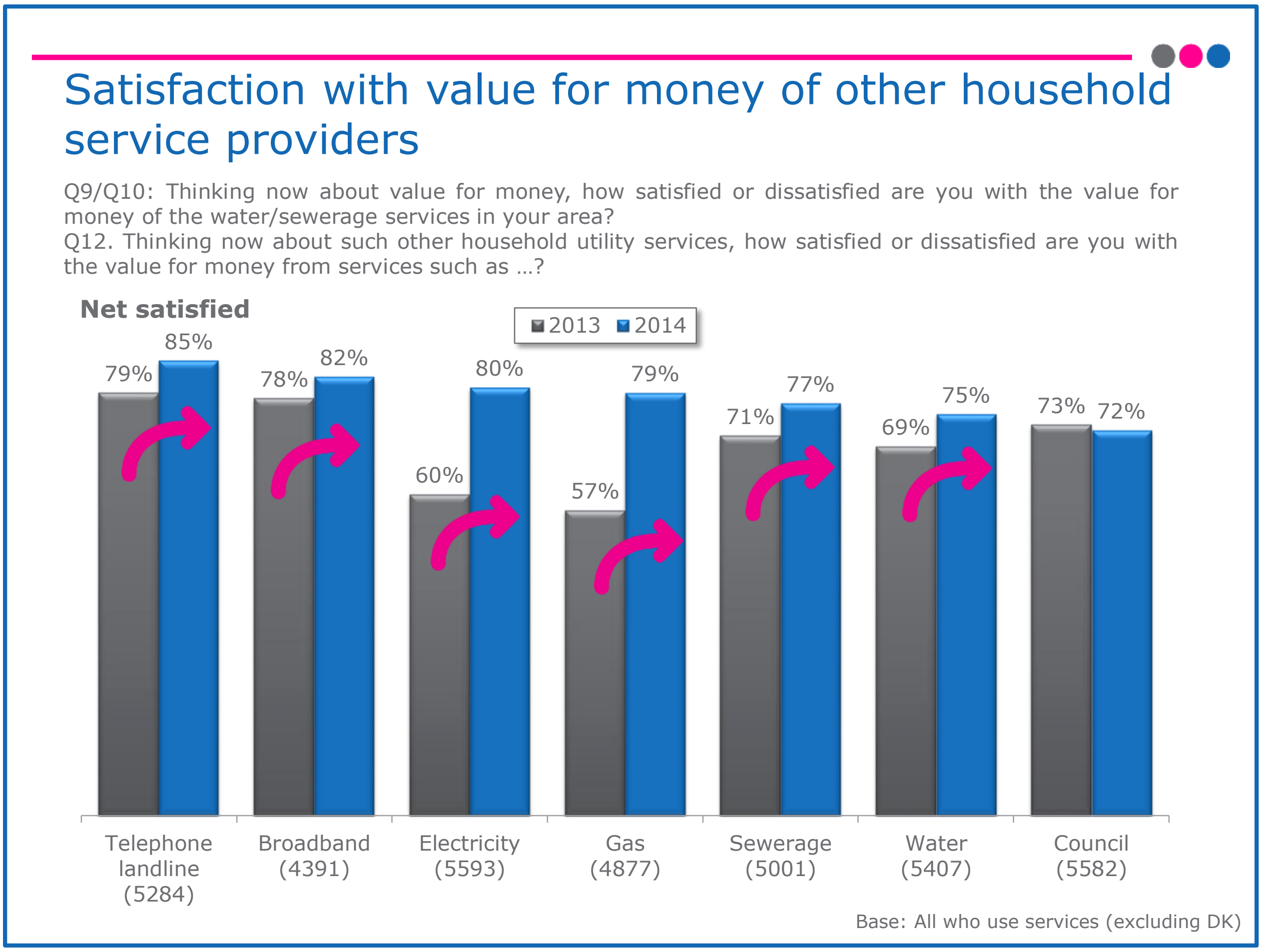
2.3.2 Satisfaction with the value for money of all providers has increased significantly since 2013, with the exception of council services.

2.3.3 The value for money of water and sewerage services is ranked fifth and sixth out of the seven services, ahead only of council services. Satisfaction with the value for money of gas and electricity has improved the most dramatically over the year, to end up ahead of water and sewerage services.

2.3.4 A fall in oil prices resulted in energy bills being reduced during 2014 with a great deal of publicity on the subject. This contrasts markedly to 2013 where the media coverage was very negative about the biggest energy suppliers and their high charges.

2.3.5 Fierce competition in the broadband market and the abundance of cheap "deals" being advertised may be behind the broadband result. Landline rental increases were announced by several of the major players in December 2014 and, therefore, may not have had time to alter people's perceptions.

Figure 9: Satisfaction with the value for money of other household service providers



2.3.6 Just under a fifth (18%) feel that their energy supplier offers good value for money whereas their water supplier does not. This is more than double the proportion in 2013 (8%).

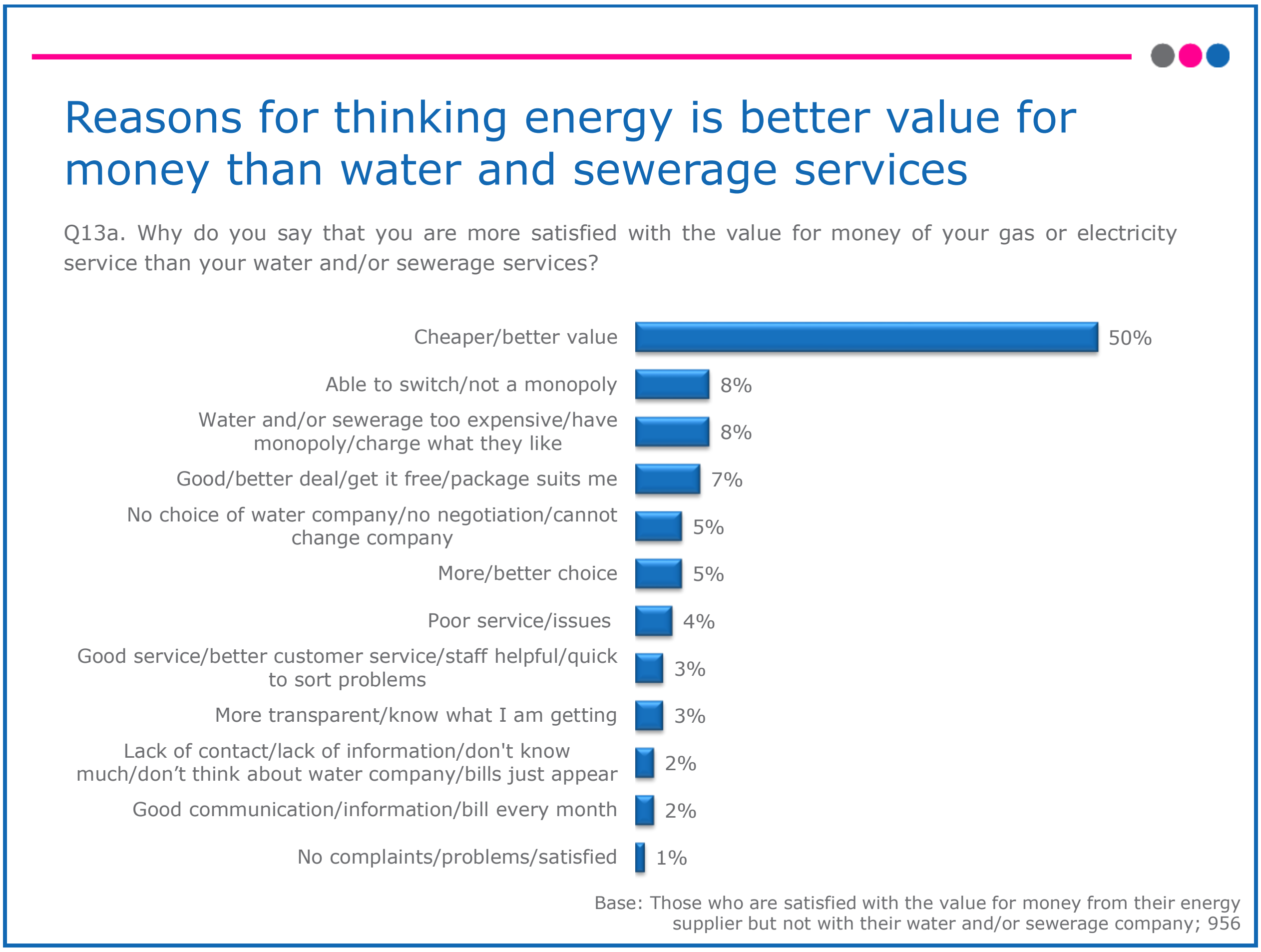
- Respondents aged 75+ tend to be more satisfied with the value for money of their electricity, gas and broadband services than their water and sewerage services.
- Respondents in intermediate occupations (e.g. clerical, sales, service) tend to be less satisfied with the value for money of their water and sewerage services than their electricity, gas and broadband services.

2.3.7 In keeping with previous years, the main reason for this (given by half) is that energy suppliers are cheaper or provide better value. Several other reasons relate to the monopoly status of the water industry (as shown in figure 10), which means customers are not able to switch if they feel that the charges are unreasonable.

2.3.8 Service and billing issues come much further down the list. Similarly to 2013, 12% were unable to give a specific reason as to why they were more satisfied with the value for money of their energy supplier than their water provider.

2.3.9 The Dissatisfied cluster is significantly more satisfied with the value for money of their energy than their water services, and they are more likely than any of the other three customer types to cite cheaper/better value (64%).

Figure 10: Reasons for thinking energy is better value for money than water and sewerage services



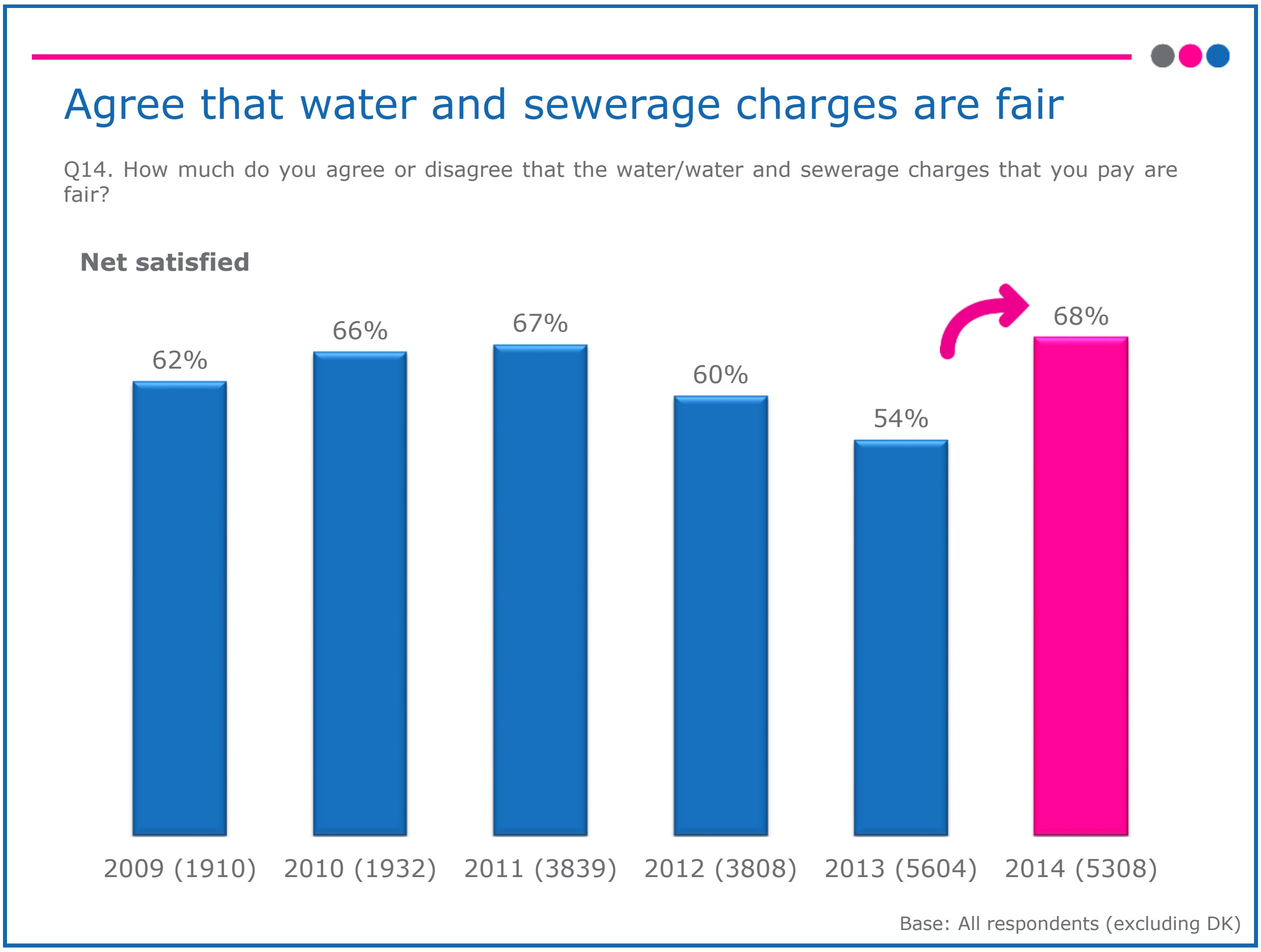
2.3.10 In 2014 customers were also asked why they rated their landline/broadband service as better value for money than water. The reasons given are almost the same as for energy, with a slightly higher number mentioning the lack of choice in the water industry: 10% cite being able to switch/not a monopoly compared to 8% giving this as a reason why energy is being better value than water, and 10% mention good/better deal/get it free/package suits me (7% energy).

2.3.11 A slightly higher proportion (15% compared to 12% for energy) cannot put their finger on a specific thing.

2.4 Fairness of water and sewerage charges

2.4.1 Over two-thirds (68%) now agree that their charges are fair, which is a significant increase on 2013's figure of 54%, and is the highest figure ever seen in this survey. In 2014 less than a fifth (17%) disagreed compared with over a quarter (26%) in 2013.

Figure 11: Agree that water and sewerage charges are fair



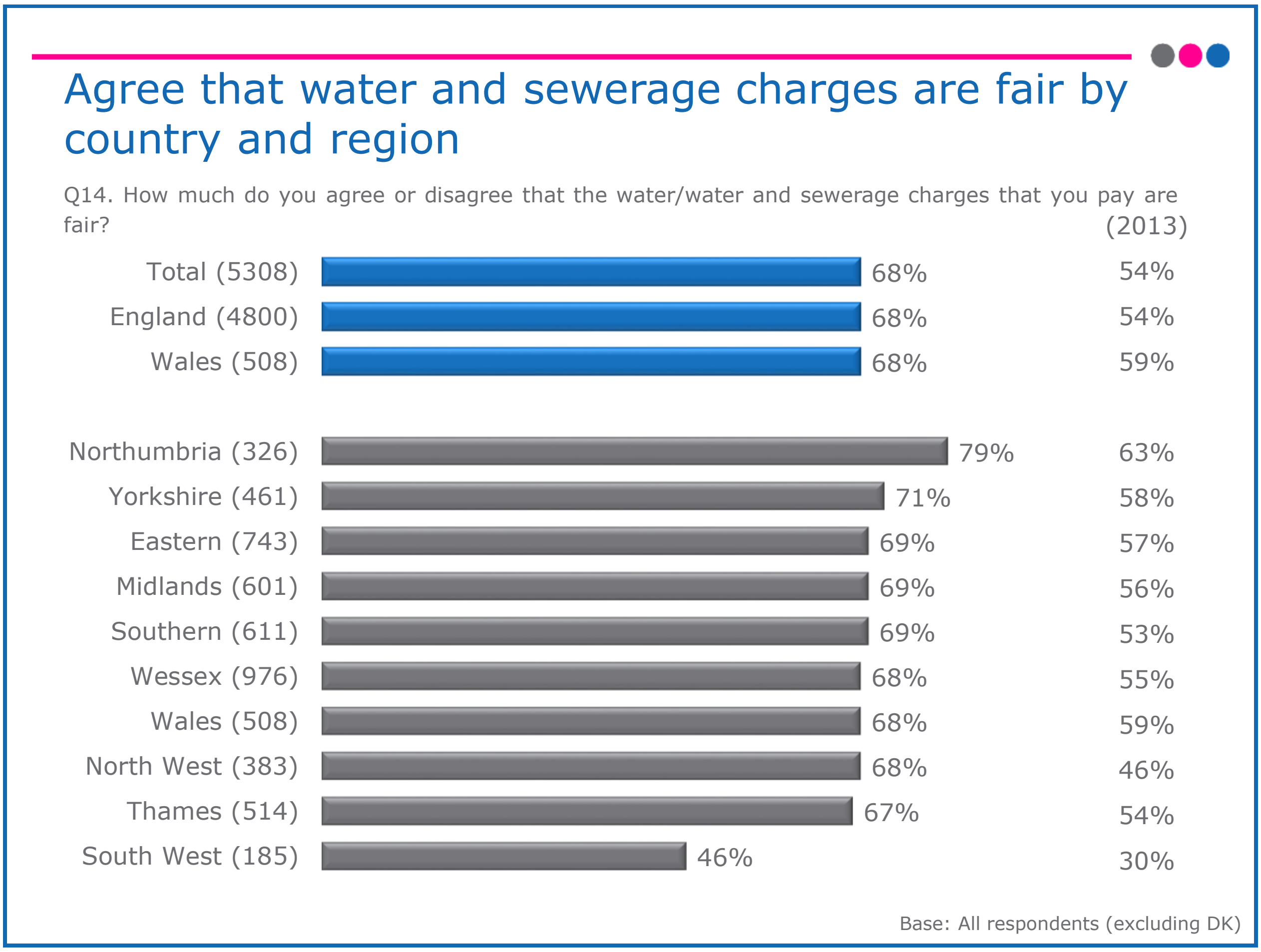
2.4.2 Perceptions of fairness have risen significantly in both England and in Wales but by a higher margin in England (from 54% to 68%), thereby bringing it up to the same level as Wales (68% from 59% in 2013). There are also significant increases across all regions compared with 2013.

2.4.3 Customers in the South West region are still least likely to find their water and sewerage charges fair (46%), however this is a significant improvement from 30% in 2013 and is one of the highest increases seen across the regions. Only the North West region has recorded a higher increase, from 46% of customers agreeing that charges were fair in 2013 to 68% in 2014 (a rise of 24%).

2.4.4 Customers in the Northumbria region are again the most positive about the fairness of their water and sewerage charges (79%).

2.4.5 Aside from customers in Northumbria and the South West, customers in all other regions have very similar perceptions of fairness.

Figure 12: Agree that water and sewerage charges are fair by country and region

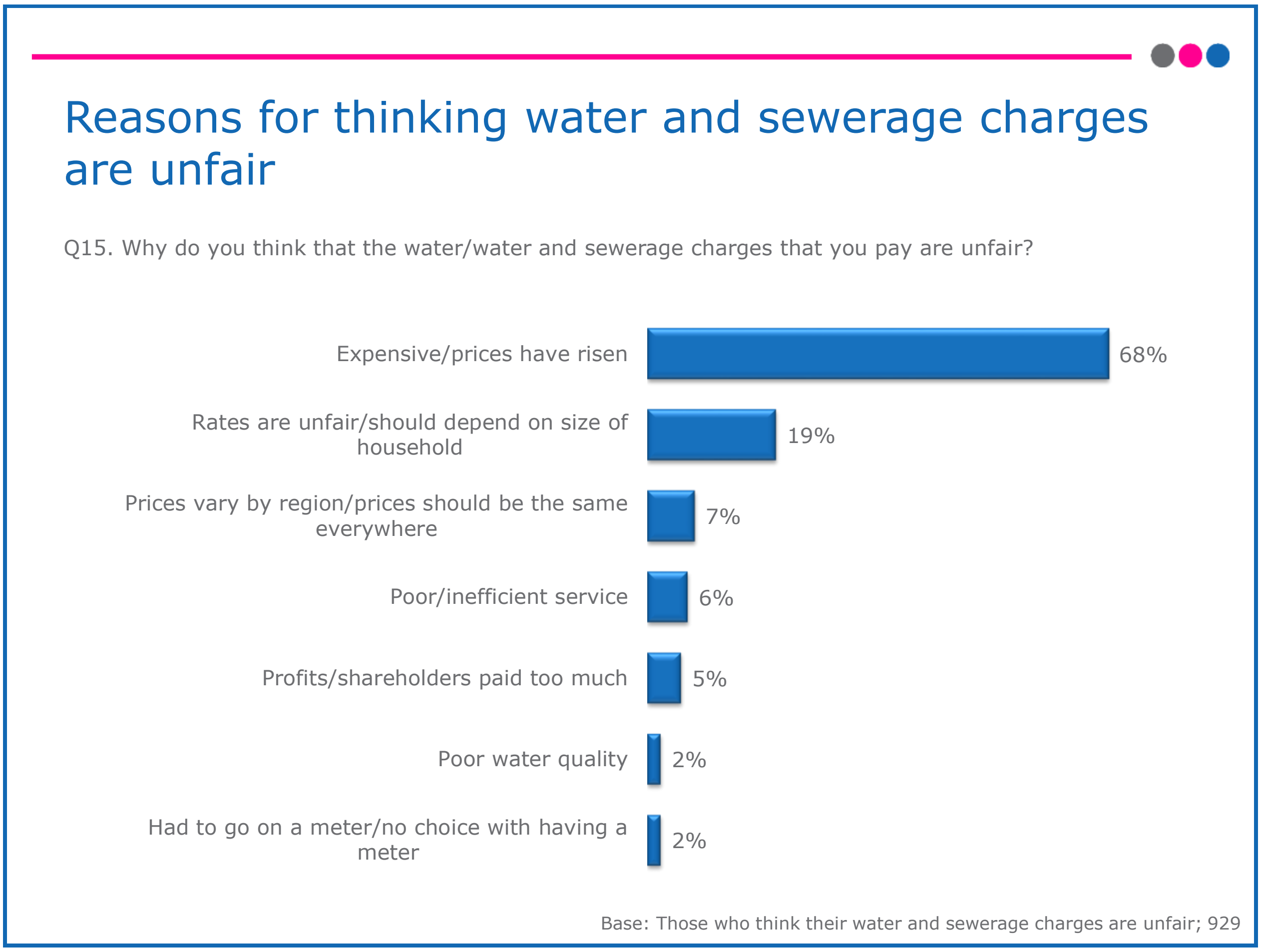


2.4.6 Views on fairness amongst different types of customers are very much in line with those on value for money in terms of demographics, clusters and other factors such as housing tenure, disability and contact with the water company.

2.4.7 In 2013 metered customers were more likely than non-metered ones to think charges are fair. However, there is no difference between them in 2014 (similar to value for money). There are differences between metered customers though - those who moved into a house which already had a meter or who requested a meter are significantly more likely to find their charges fair (69% and 75% respectively) than customers in households which have been compulsory metered (58%). The effect of compulsory metering on perceptions of fairness will be further understood from future surveys.

2.4.8 Charges are perceived as unfair for two main reasons; over two-thirds (68%) feel that they are expensive or have risen and just under a fifth (19%) are critical because charges are not based on the size of the household (significantly higher amongst unmetered households - 23% compared with 15% for metered). A much smaller number (7%) are not happy because prices are not uniform across regions.

Figure 13: Reasons for unfairness of water and sewerage charges



2.5 Affordability of water and sewerage charges

2.5.1 Three quarters (77%) of all customers agree that water and sewerage charges are affordable to them. This has increased significantly from 67% in 2013.

2.5.2 The more favourable economic conditions experienced during 2014 may be feeding into these improved perceptions of affordability:

- Unemployment being at its lowest level for many years[5]
- Wages beginning to pick up[6]

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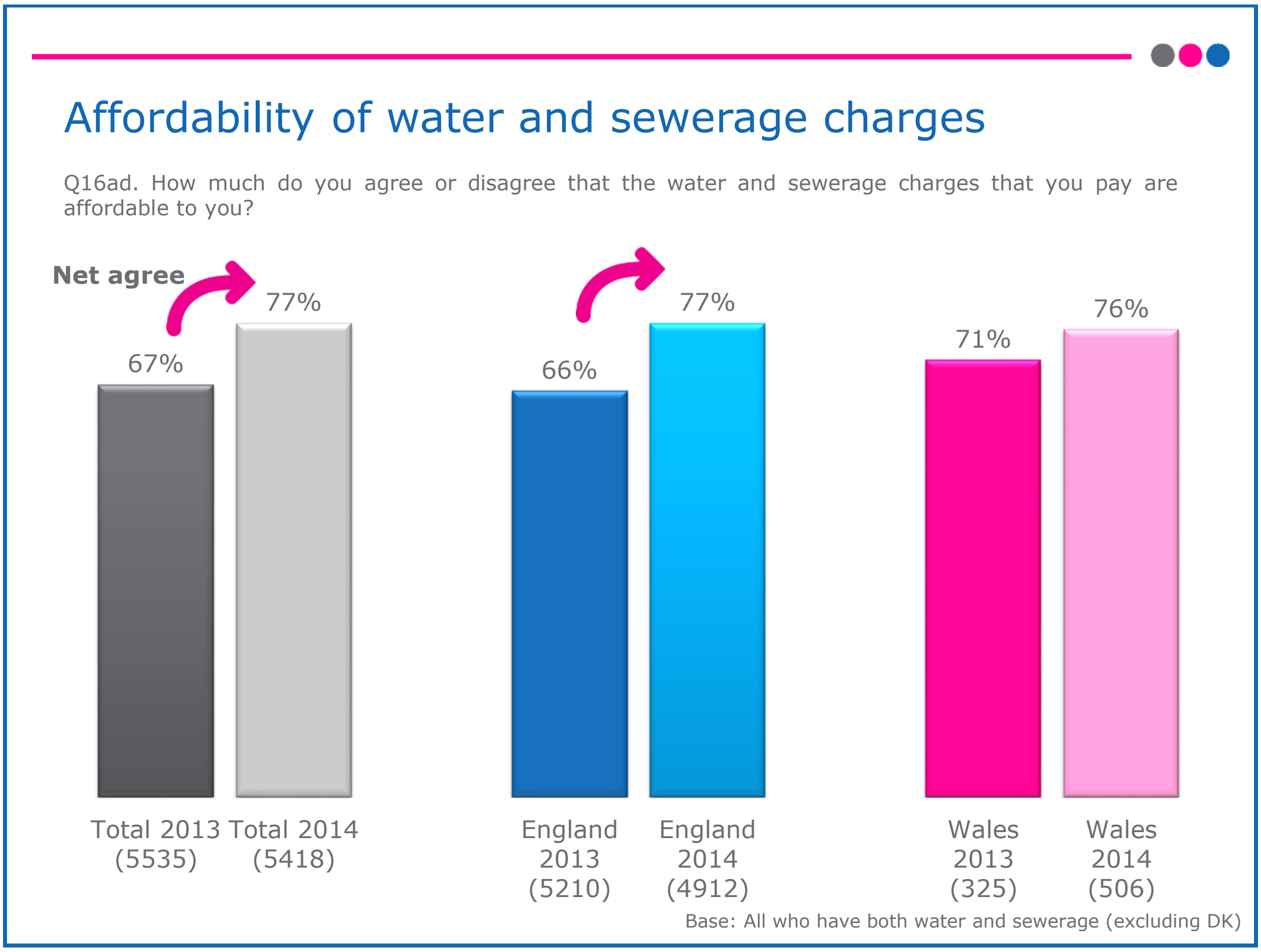
[5] Unemployment dropped from 6.9% in January 2014 to 5.5% in December 2014
[6] Average pay rose by 1.8 per cent in the quarter to November (ONS).This is the highest for more than two years, and more than three times ahead of December's official inflation rate of 0.5 per cent

- Inflation at its lowest level since 1996[7]

2.5.3 Whereas in 2013 customers in Wales were more likely to agree that their charges are affordable than customers in England (71% compared with 66%), in 2014 the significant increase in affordability in England means there is no longer any difference in views between English and Welsh customers.

Figure 14: Affordability of water and sewerage charges

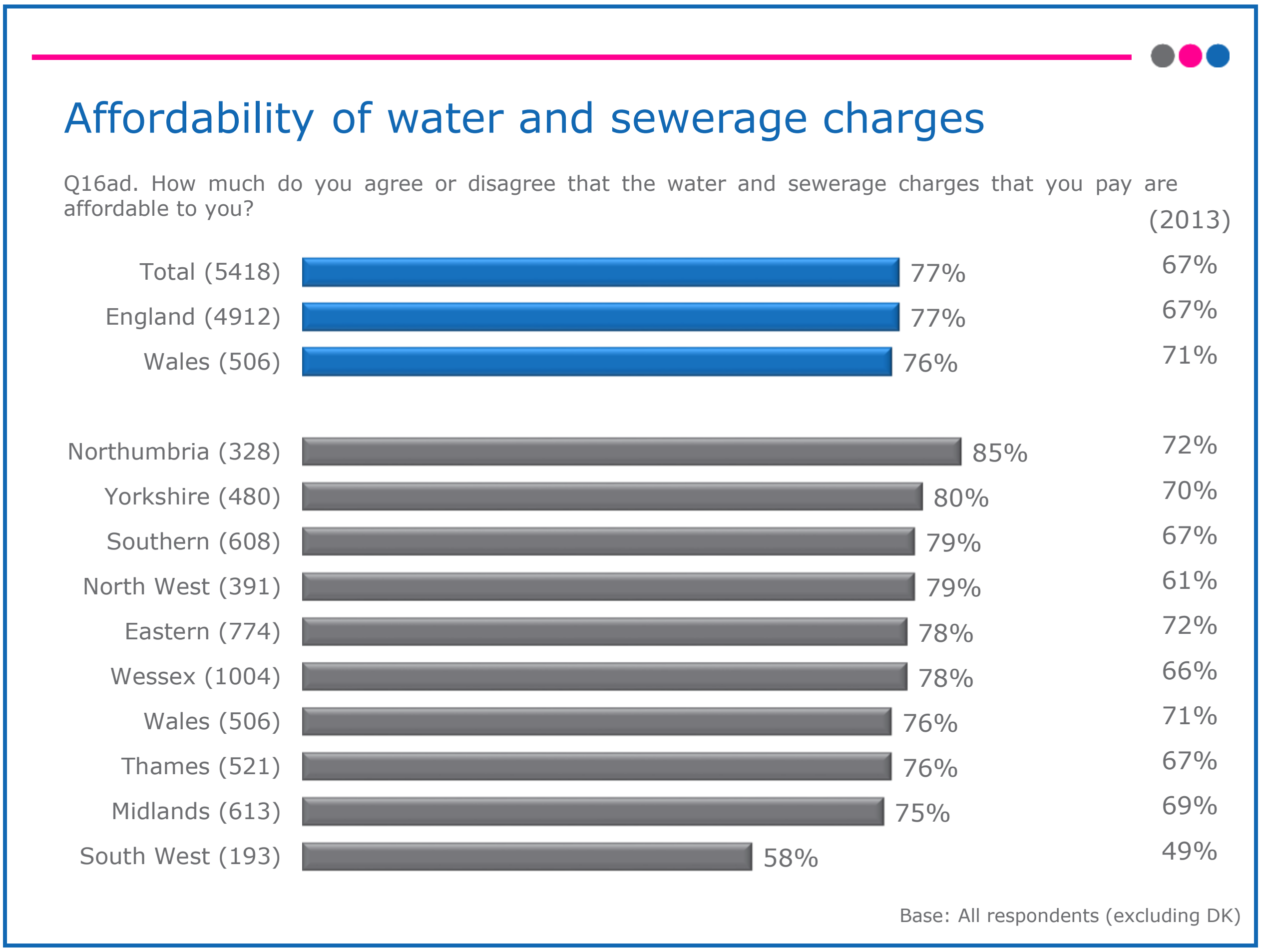


2.5.4 Perceptions of affordability have improved in all WaSC regions since 2013 and significantly so except in the regions for Wales, Eastern, Thames and the Midlands. Seven-tenths or more of customers in all regions, except the South West, now agree that their water and/or sewerage charges are affordable.

[7] ONS figures show that the rate of inflation is at the joint lowest level since records began in 1996. The CPI increased by only 0.5% in the year to December 2014.

2.5.5 Whilst customers in the South West are still more negative than those in other regions, the proportion saying the charges are unaffordable has gone down from 41% in 2013 to 28% in this year's survey.

Figure 15: Affordability of water and sewerage charges by country and region



2.5.6 The customer groups below are significantly more likely to agree their bill is affordable. These groups are, in most cases, the same as in 2013:

- Metered customers (79% compared to 76% of unmetered), particularly those who requested a meter (83%) or already had a meter when they moved in (78%) compared to those who were compulsorily metered (73%).
- Younger and older customers (80% of 18-29s, 81% of 60-74s and 85% of 75+ compared to 75% of 30-44s and 73% of 45-59s). The more positive ratings from each end of the age spectrum has already been seen concerning fairness and value for money.
- Probably linked to the difference by age: households with no children (77% compared to 71% of those with children under 18 at home).
- Owner occupiers. Once again we see the most negative ratings from housing association tenants rather than renters as a whole (80% of owner occupiers, 76% of private renters and 71% of council tenants compared to 62% of housing association tenants).

Figure 16: Groups of customers who agree their bill is affordable

Types of customers significantly more likely to perceive their bills as affordable		Compared to…	
Metered	79%	Unmetered	76%
Moved into a metered house	78%	Meter optants	83%
Compulsory metered	73%		
Haven't contacted their water company in the last 12 months	78%	Contacted their company in the last 12 months	70%
No-one in the household has a long term illness/disability	79%	A household member has a long term illness/disability	72%
Social group – higher managerial	80%	Unemployed/never worked/student	68%
Social groups – intermediate, routine and manual	77%		
Household not receiving benefits	81%	Household receiving benefits	69%
Younger age-groups aged 18-29 Older age-groups aged 60-74 Older age-groups aged 75+	80% 81% 85%	Middle age groups aged 30-44 Middle age groups aged 45-59	75% 73%
No children at home	77%	Children under 18 at home	72%
Owner occupiers	80%	Housing association tenants	62%
Private renters	76%		
Council Tenants	71%		
Heard of it, but do not need WaterSure/Welsh Water Assist	81%	Would like to know more about WaterSure/Welsh Water Assist	50%
Subscribed to WaterSure/Welsh Water Asssist	74%		
Do not need WaterSure/Welsh Water Assist	81%		

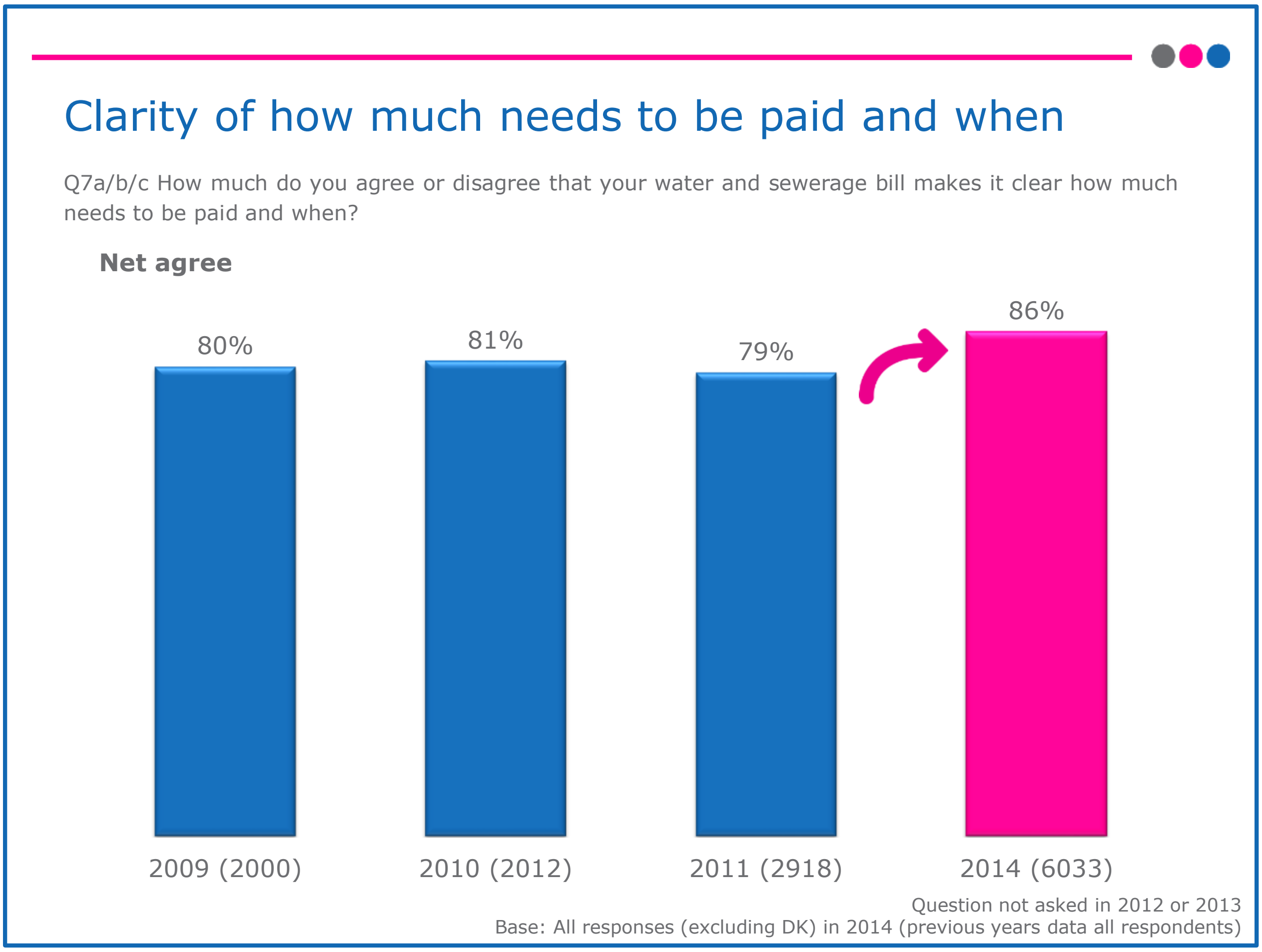
2.6 Clarity of bills

2.6.1 For the first time since the 2011, the survey asked all customers for their views on bill clarity, specifically how clear is it:

- how much needs to be paid and when; and,
- how the amount payable is reached.

2.6.2 A very high proportion of customers (86%) feel that their bills are clear about how much is due and when the payment needs to be made. This is irrespective of whether they have combined (86%) or separate bills (86% water bill, 85% sewerage bill).

Figure 17: Clarity of how much needs to be paid and when[8]



2.6.3 There is no difference in views between England and Wales in terms of how much needs to be paid and when. Although the results are very positive for all regions, customers in the Thames region are significantly less likely to agree their bills are clear than customers in five other regions: South West, Yorkshire, Wessex, Eastern and Southern. Although most customers in the South West feel that their charges are unfair, they have no problems with bill clarity in terms of how much needs to be paid and when and how the final amount was reached.

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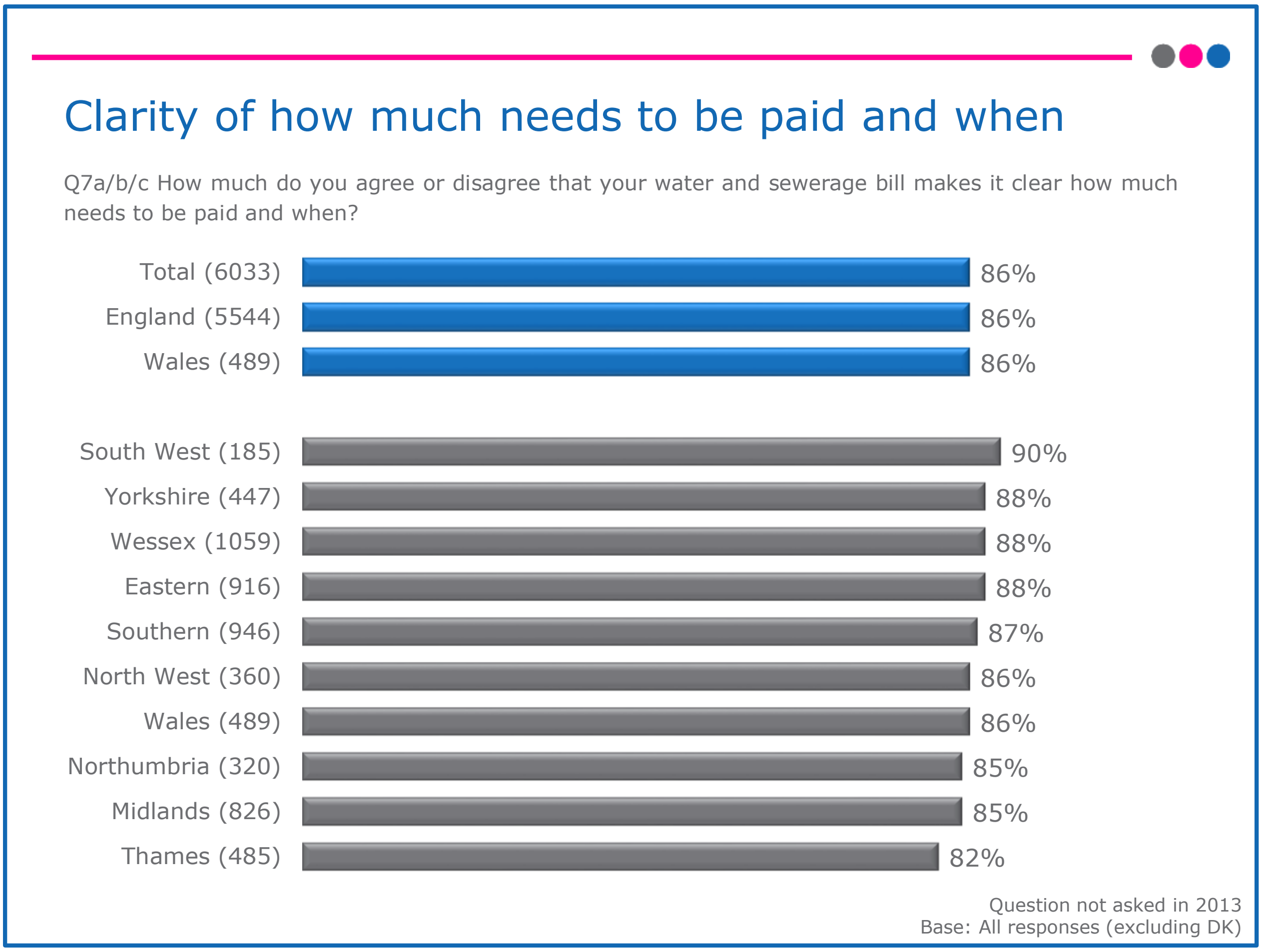
[8] Customers with separate water and sewerage bills were asked questions for each separate bill, whereas those with a combined water and sewerage bill were just asked once. The data has been combined and results are shown by number of responses rather than number of respondents in figures 17-20.

Figure 18: Clarity of how much needs to be paid and when by country and region

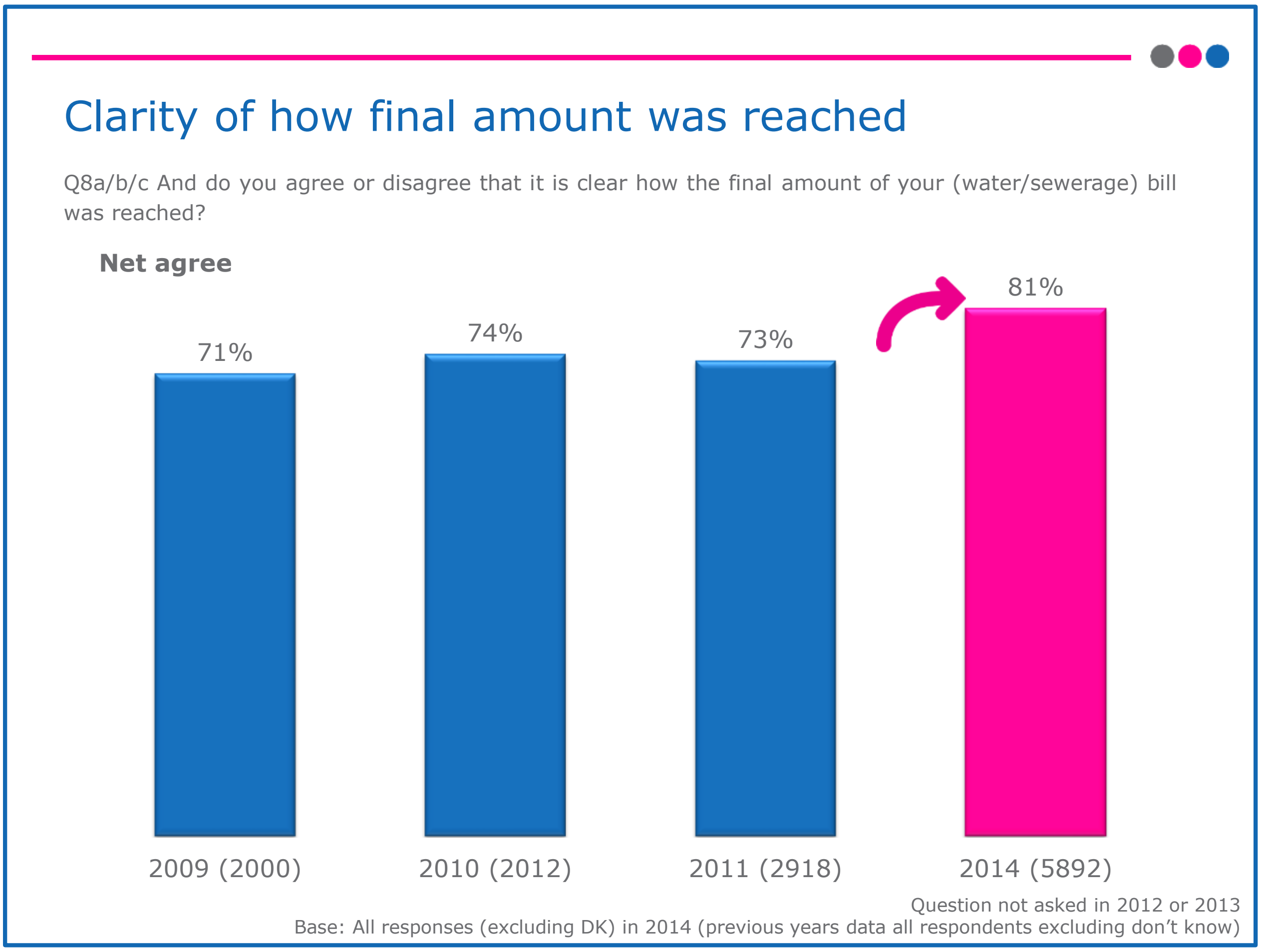


2.6.4 There are fewer differences in views between customer groups than on previous questions. However, there are still some significant differences:

- Those who are dissatisfied with their water and sewerage services and those who have been in contact are less positive on this issue as with everything else;
- Older customers are more likely to feel the bill is clear (91% of those aged over 75, compared to 80% of 18-29). This may be because older customers are more familiar with water bills than some 18-29 year olds.
- Owner occupiers are more positive than social renters (87% compared to 81% council and housing association tenants).
- Metered customers find it easier to know the amount due and the payment date of their bill than those without a meter (88% compared to 84%). Amongst metered customers, those who requested a meter were significantly more likely to agree that it is clear (91% agreed compared to 87% with a compulsory meter and 86% who moved into a house which already had a meter).
- Only 61% of the Dissatisfied cluster are happy with the bill clarity in terms of how much needs to be paid and when compared to 77% of Unfair, 78% of Neutral and 93% of Very Satisfied.

2.6.5 Four out of five customers (81%) are clear about how the final amount on their bill was reached. This is significantly higher than in 2011 when the question was last asked, and is irrespective of whether they have combined (81%) or separate bills (81% water bill, 80% sewerage bill).

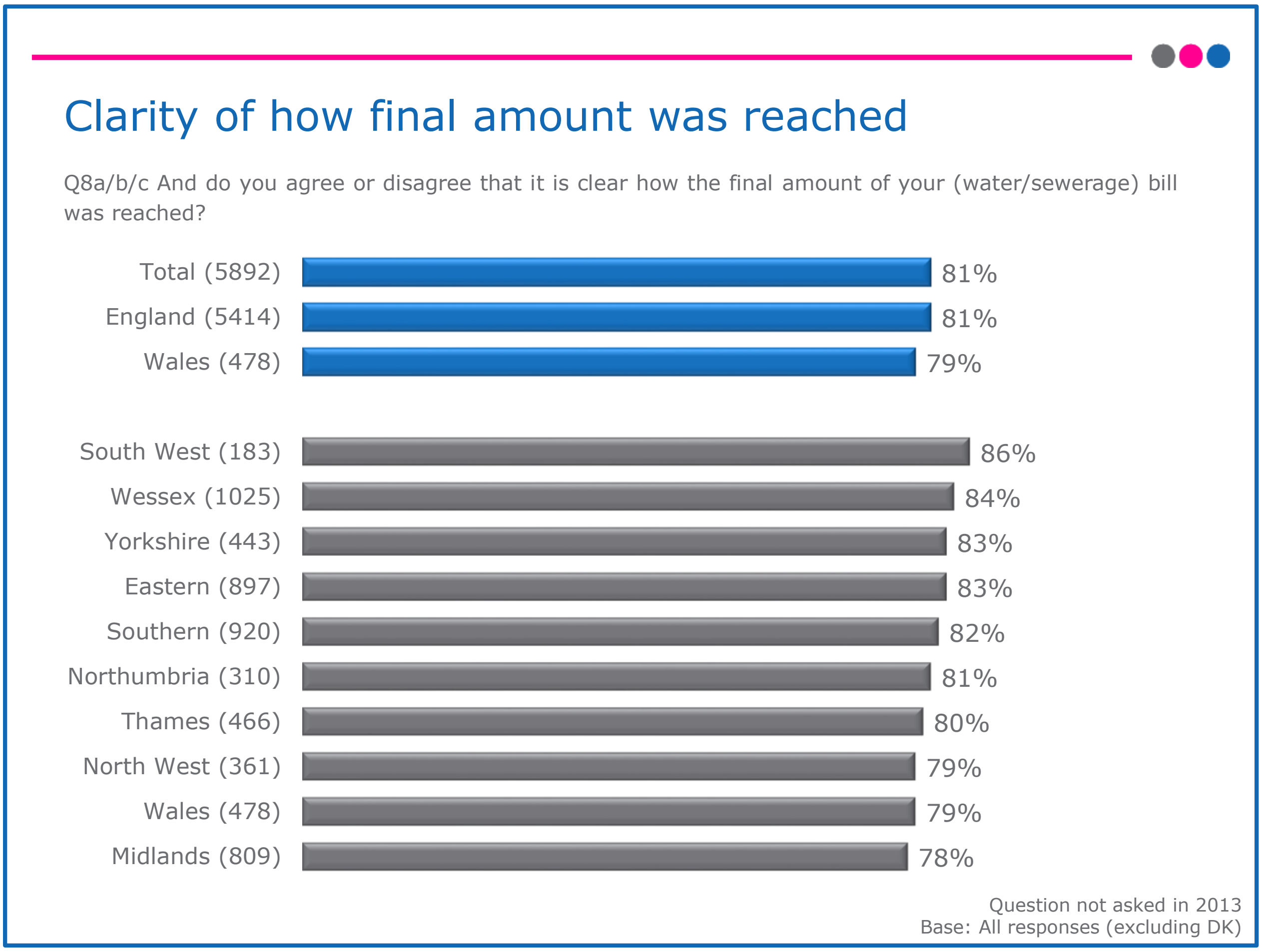
Figure 19: Clarity of how final amount was reached



2.6.6 Welsh customers are slightly less likely than English customers to be clear on how the final bill amount was reached (79% compared to 81%).

2.6.7 Although the results are again very positive for all regions, customers in the Midlands are significantly less likely to agree their bills are clear than customers in five other regions: South West, Yorkshire, Wessex, Eastern and Southern. Customers in the South West have the highest level of agreement, as they do for knowing how much needs to be paid and when.

Figure 20: Clarity of how final amount was reached by country and region



2.6.8 Overall, customers of WaSCs and WoCs have similar levels of agreement on the clarity of how much needs to be paid and when (80% compared to 82%). There is a fairly small gap (8%) between the highest and lowest rated WaSCs but the gap is wider for WoCs (17%):

- WaSCs: South West 86%; Thames, United Utilities 78%;
- WoCs: Cambridge 91%; South Staffs 74%.

3. Consumer rights and responsibilities

Water companies are obliged to provide certain services for low income and vulnerable groups in society. Customers also have the right to request a water meter. This chapter examines customers' awareness and views on these services.

Key trends

- Awareness of WaterSure/Welsh Water Assist remains at a low level of 1 in 10
- In contrast, awareness of "special assistance" services continues to rise strongly each year e.g. the elderly or disabled (31% in 2013, 48% in 2014).[9]
- Awareness of the free meter scheme amongst unmetered households has fallen back sharply (62% in 2013 to 54% in 2014) after previously increasing year on year. However, awareness that water meters can be trialled for 12 months has remained the same (29% in 2014 and 29% in 2013).
- Awareness of the Guaranteed Standards Scheme (GSS) – the compensation scheme for failure to meet customer service standards - has remained stable (42%).
- Three-quarters of customers (76%) would be likely to contact their water company if worried about paying their bill, reversing the downward trend seen since 2010.
- Satisfaction levels with contact handling continue to increase and now stand at 83%, up from 69% in 2011.

Key changes since 2013

- The proportion of customers not aware of WaterSure/Welsh Water Assist and wanting to know more has fallen significantly from 12% to 9%.
- Awareness of special assistance services has increased from 31% to 48% (there were some minor changes in the wording of the question).
- Across the sample, awareness that meters can be requested free of charge has fallen to 60% in 2014, down from 70% in 2013 (from 63% to 54% amongst unmetered customers).
- Likelihood of customers contacting their water provider if they were worried about paying their bill has increased significantly to 76% in 2014, up from 67% in 2013.

[9] Question changed from "Are you aware of your water company's services for elderly and/or disabled customers? These might include…" in 2013 to "Are you aware of any additional services offered by your water company, such as…?" in 2014, so care needs to be taken when comparing results from previous years. Special Assistance services such as braille or large print bills are available to customers who need them. Some of these services, such as password schemes for home visits are available to all customers.

- Awareness of the surface water (rainwater) drainage rebate has fallen significantly since last year (from 23% to 16%).
- Fewer customers are contacting their water company (15% down from 18% in 2013 - which reverses the previous upward trend).
- Satisfaction with contact handling has increased significantly from 78% in 2013 to 83% this year.

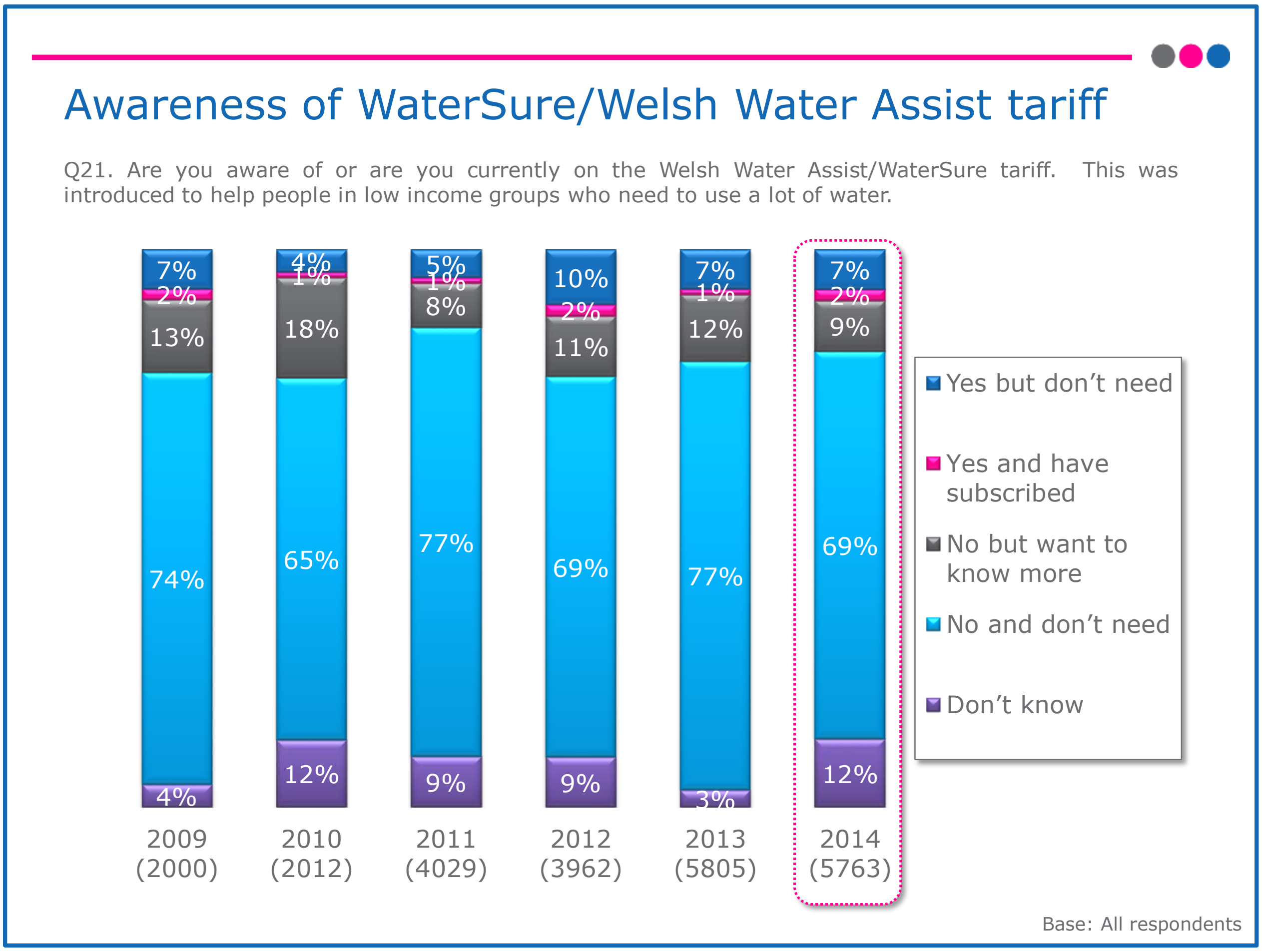
New questions

- Customers who have made contact were asked, for the first time, about the amount of effort it took them to get their query resolved. Half of customers (52%) are putting in the amount of effort they expected, three in ten say it took less effort than expected (29%), and one in five customers said it took them more effort (19%).

3.1 WaterSure/Welsh Water Assist tariff

3.1.1 One in ten customers is aware of these tariffs which are designed to help people with low incomes who need to use a lot of water, which is very similar to 2013's figure of 9%. The proportion unaware of the tariffs but who would like to know more has fallen from 12% in 2013 to 9% in 2014; this is driven by an increase in 'don't know' responses from 3% to 12% in 2014. When removing the 'don't know' responses in 2014 and 2013, the results are very similar year on year.

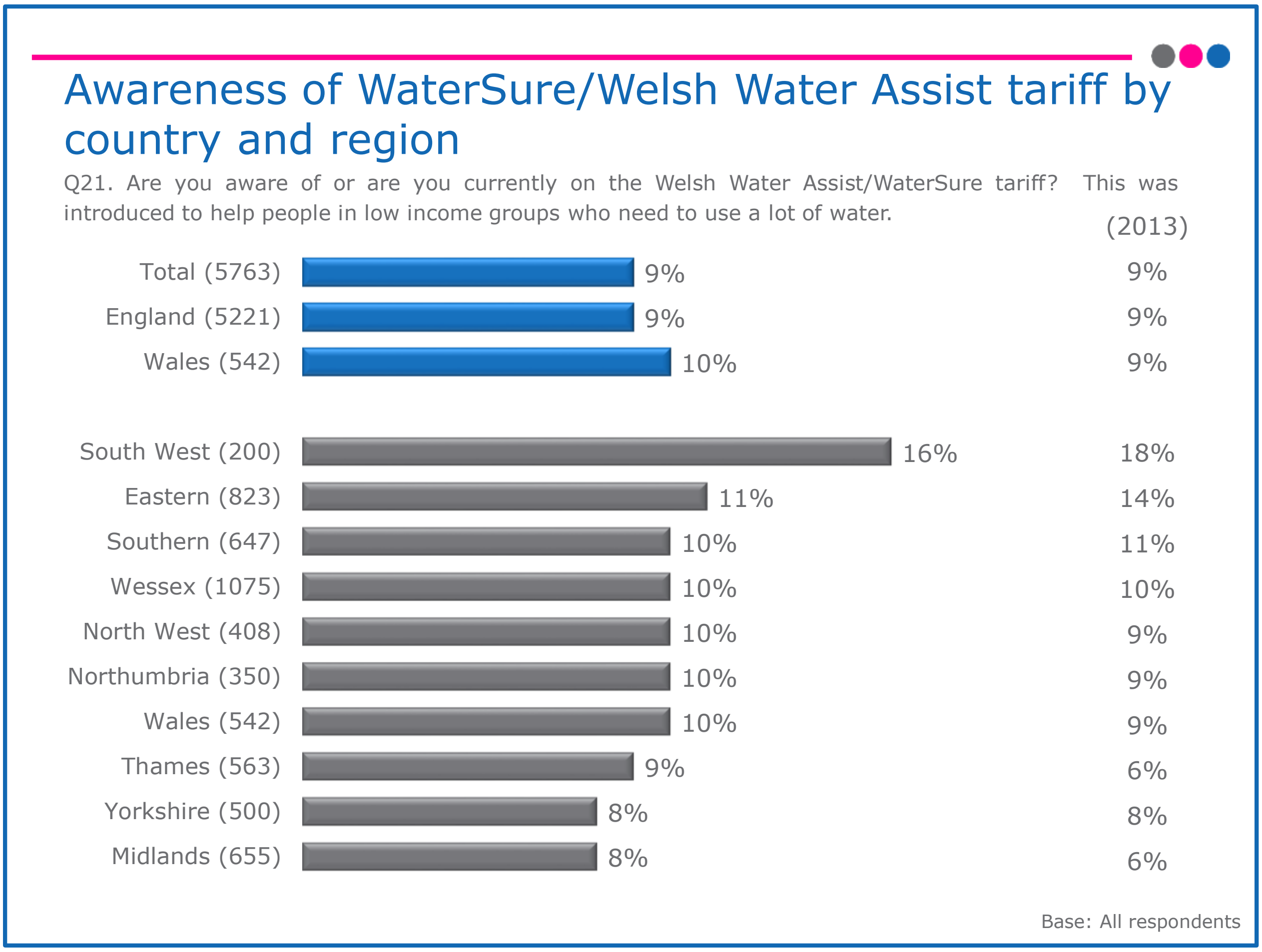
Figure 21: Awareness of WaterSure/Welsh Water Assist tariff



3.1.2 Awareness levels are similar across England and Wales.

3.1.3 At regional level, awareness is still highest in the South West, despite a small drop compared to 2013 (16% down from 18%). This could be because the South West has the highest proportion of metered customers in this sample and WaterSure is only available to customers with a meter. Awareness in England is also higher amongst metered customers than unmetered (11% compared to 8%). Thames is the only region where there is a significant change in awareness levels since 2013 (up to 9% in 2014 from 6% in 2013).

Figure 22: Awareness of WaterSure/Welsh Water Assist tariff by country and region



3.1.4 Customers who are currently unaware of the scheme but are keen to learn more about it are most likely to come from the harder to reach/more vulnerable sections of society, namely:

- Households with a member who is disabled or experiencing long term illness (18% compared to 7% of those without)
- Social renters (21% of housing association and 16% of council tenants compared to 7% of owner occupiers and 10% of private renters)
- Households receiving benefits (16% compared to 7% of those not)
- Those in the Dissatisfied segment (28% compared to 6% of the Very Satisfied segment and around 10% of the other two groups)

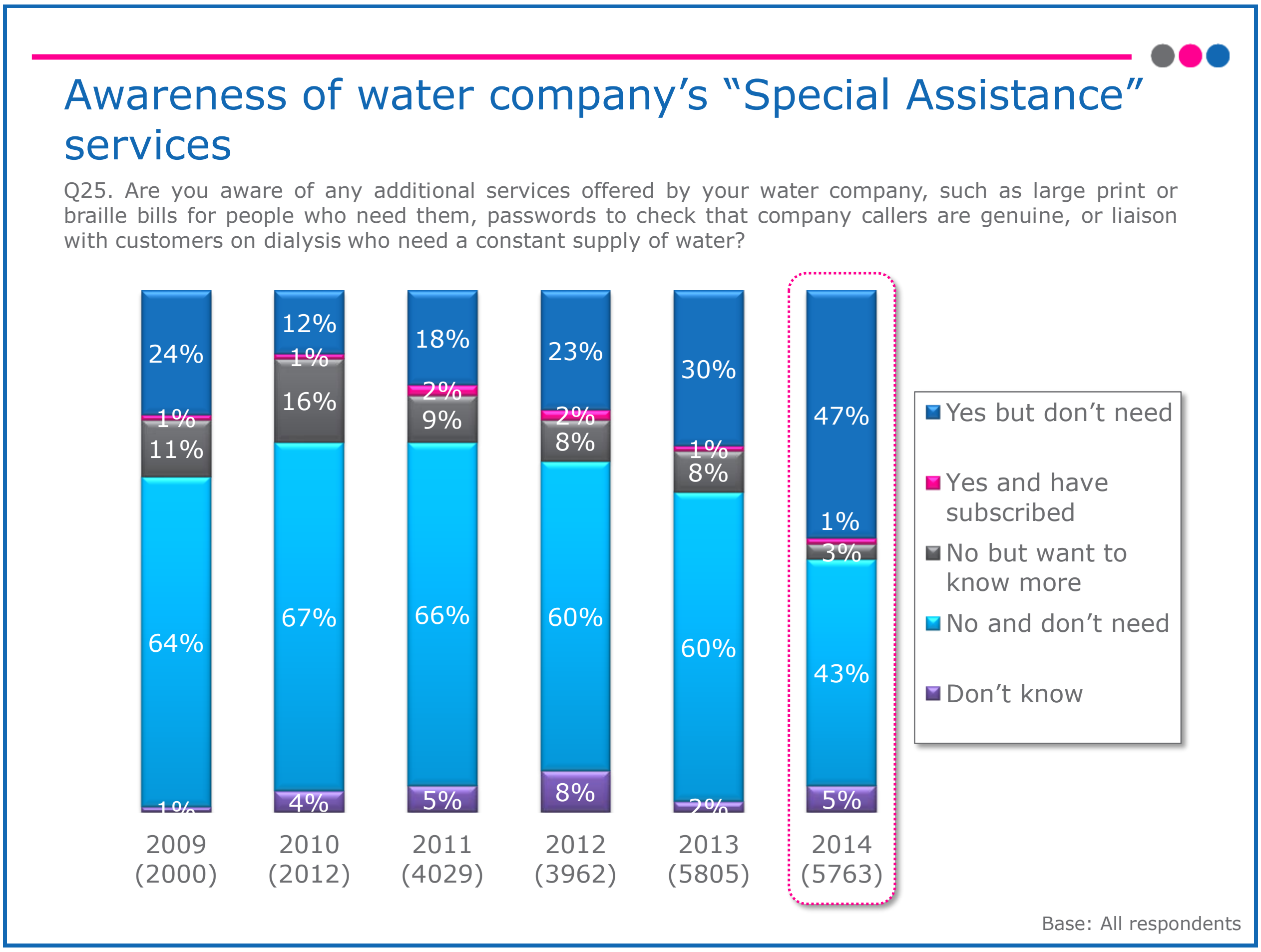
3.1.5 Awareness of, or subscription to, other schemes offered by their supplier which reduce water bills for customers who genuinely struggle to afford them, is still low and similar to 2013 (4% compared to 3%). The highest awareness of a particular scheme is 2% for the Severn Trent Trust Fund and only 1% for any other schemes mentioned.

3.2 Special assistance services

3.2.1 The wording of this question was altered slightly in 2014 from previous years. Examples of the type of services available were given but there was no specific reference to the "elderly" or "disabled" as some of these services, such as password schemes for visiting company representatives, are available to all customers when requested. Therefore, caution needs to be taken when making direct comparisons with previous years. It would appear that awareness of services continues its strong upward trend over the last four years from 12% in 2010 to 47% in 2014. However, uptake remains static at 1%.

3.2.2 In tandem with the rise in awareness, the proportion of customers who would like to know more about these services has dropped from 8% in 2013 to 3%. Only 5% of those in a household with someone with a disability and 3% of the over 75s would like to know more about the services on offer.

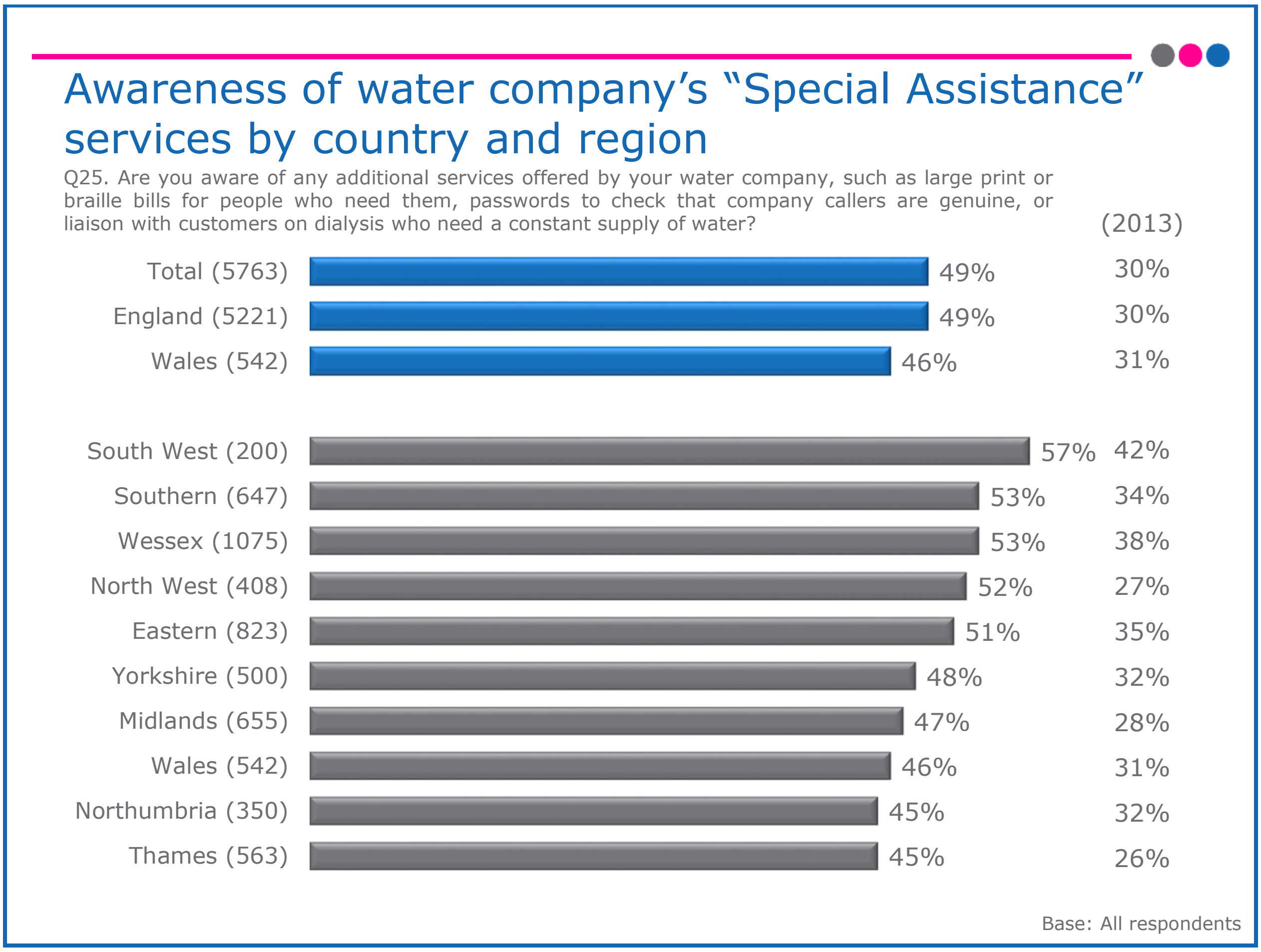
Figure 23: Awareness of water company's "Special Assistance" services



3.2.3 There is no difference in awareness by country, with levels rising significantly in both England and Wales.

3.2.4 Awareness of "Special Assistance" services has risen significantly across all regions. The biggest increase can be seen in the North West (52% compared to 27% in 2013). Similar to WaterSure, more people know about these additional services in the South West than any other regions, as was the case in 2013.

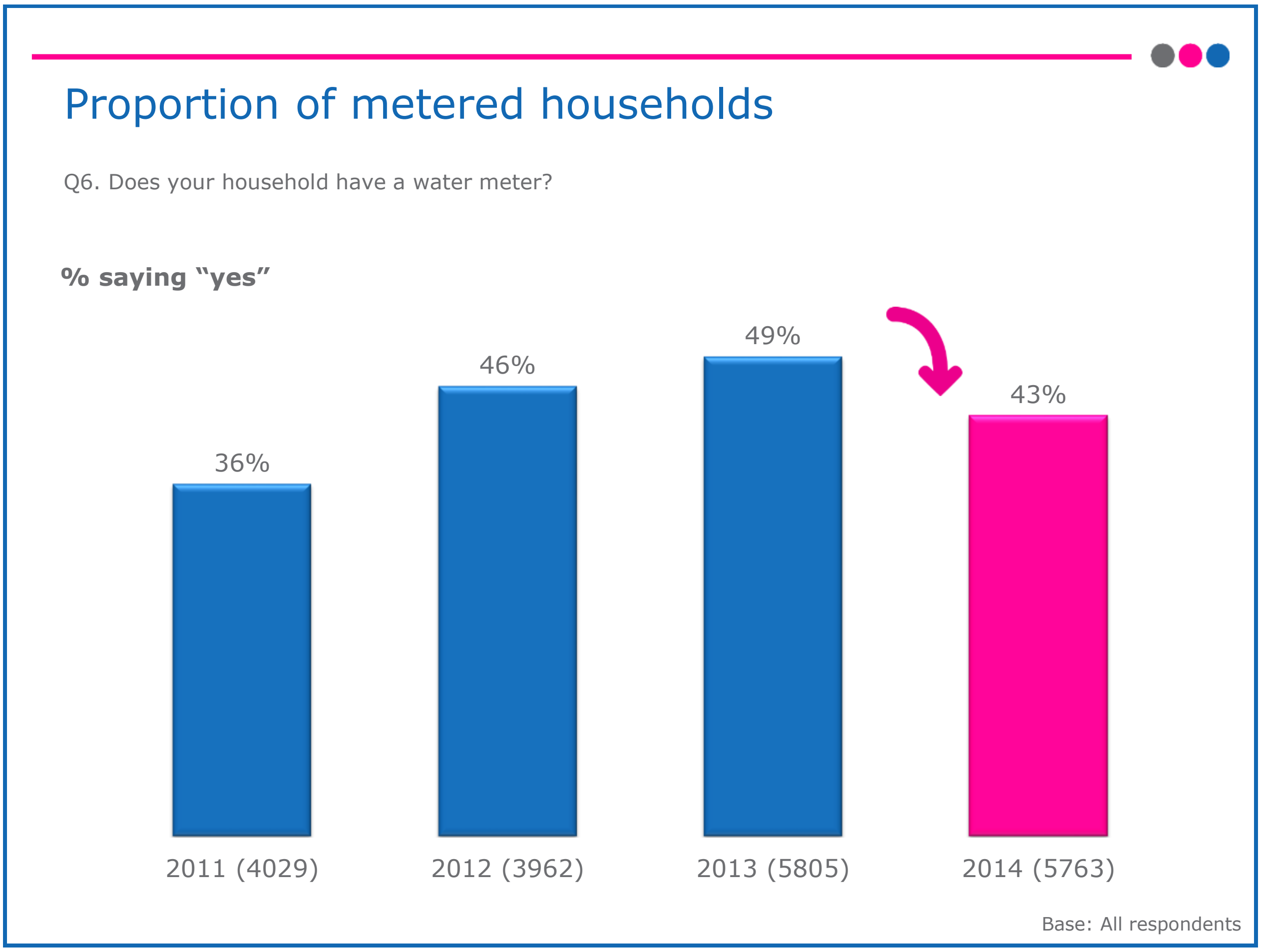
Figure 24: Awareness of water company's "Special Assistance" services by country and region



3.3 Proportion of metered households

3.3.1 The proportion of customers from metered households in this year's sample has fallen significantly from 49% in 2013 to 43% in 2014. The actual proportion of metered households in England and Wales is currently around 48%[10] and is expected to rise to over 50% in 2015, and was nearer 40% in 2013[11]. These figures mean that the proportion of respondents from metered households in 2013's survey was somewhat higher than the true figure, whilst the 2014 one is slightly lower.

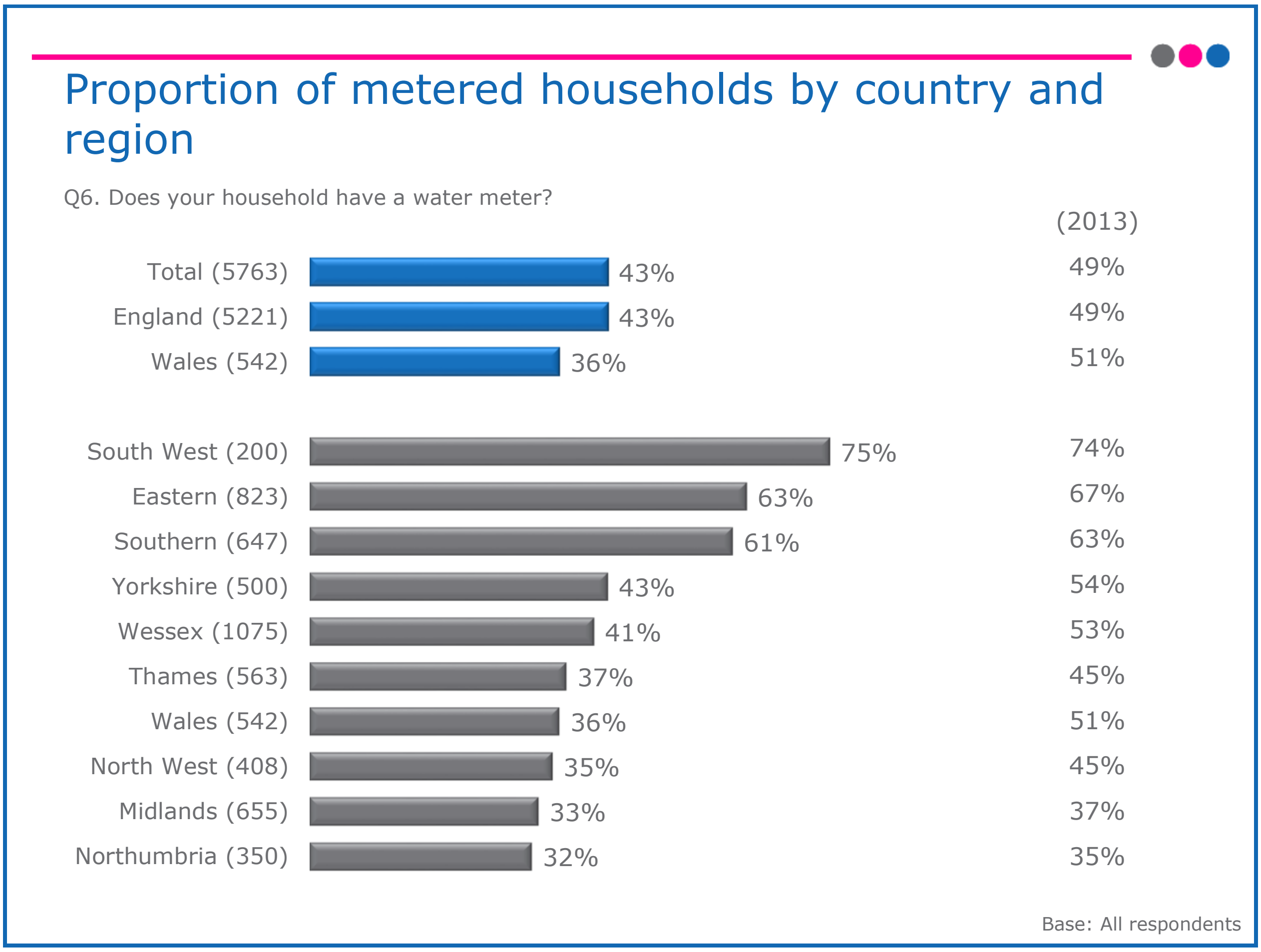
Figure 25: Proportion of metered households



[10] https://www.ofwat.gov.uk/pricereview/pr14/det_pr20141212final.pdf (page 9)
[11] https://www.ofwat.gov.uk/mediacentre/leaflets/prs_lft_101117meters.pdf (page 3)

3.3.2 The South West region continues to have the highest proportion of metered customers (75%) and the Northumbria region the least (32%). There has been a significant decrease in the proportion of metered households in the sample for this survey across both countries and all regions compared to the 2013 survey sample.

Figure 26: Proportion of metered households by country and region

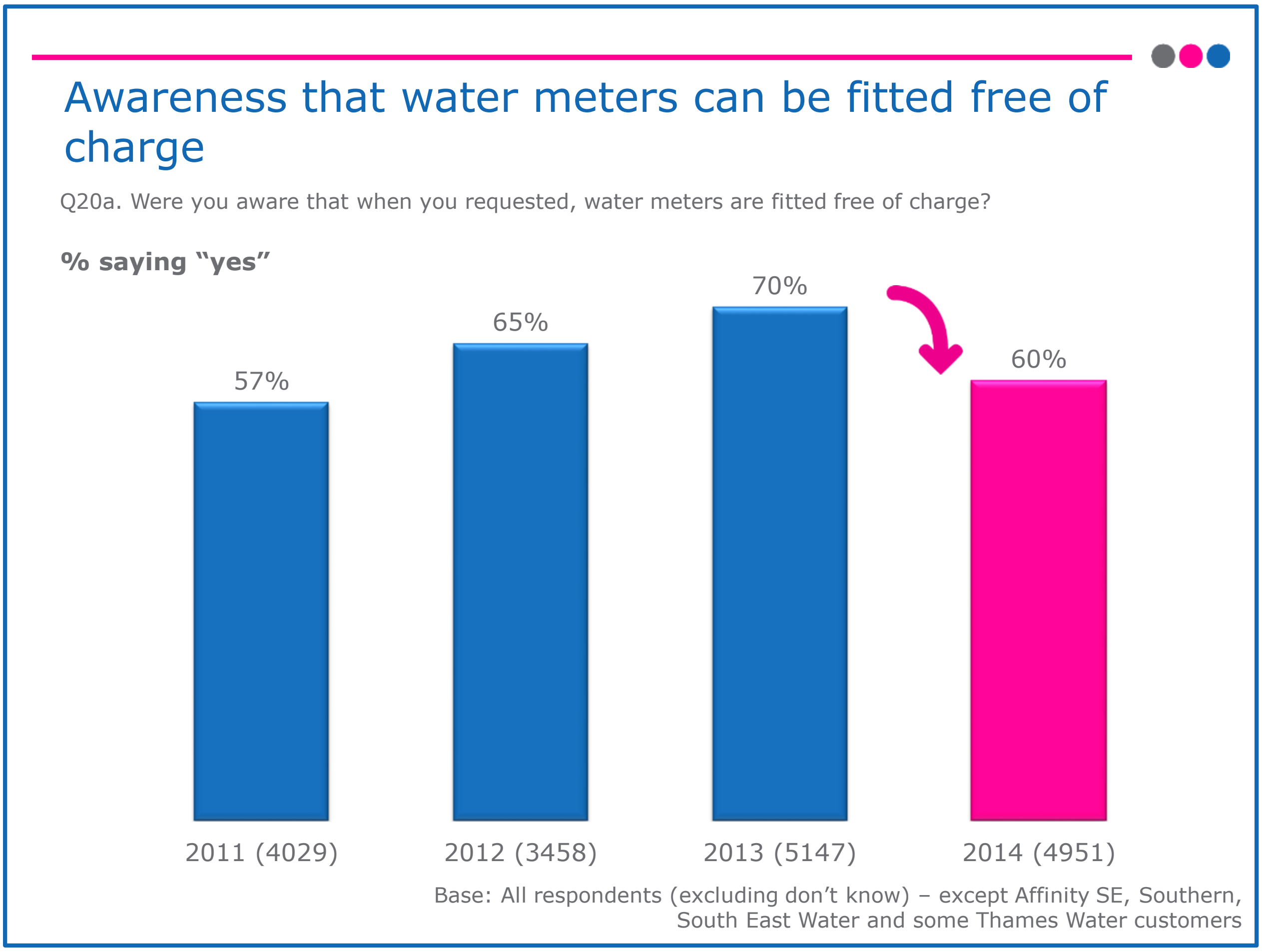


3.4 Requesting a meter

3.4.1 Six out of 10 customers know that meters can be fitted free of charge on request, which is a significant decrease since 2013 (70%).

3.4.2 Amongst unmetered customers there is a similar fall in awareness, from 62% in 2013 to 54% in 2014.

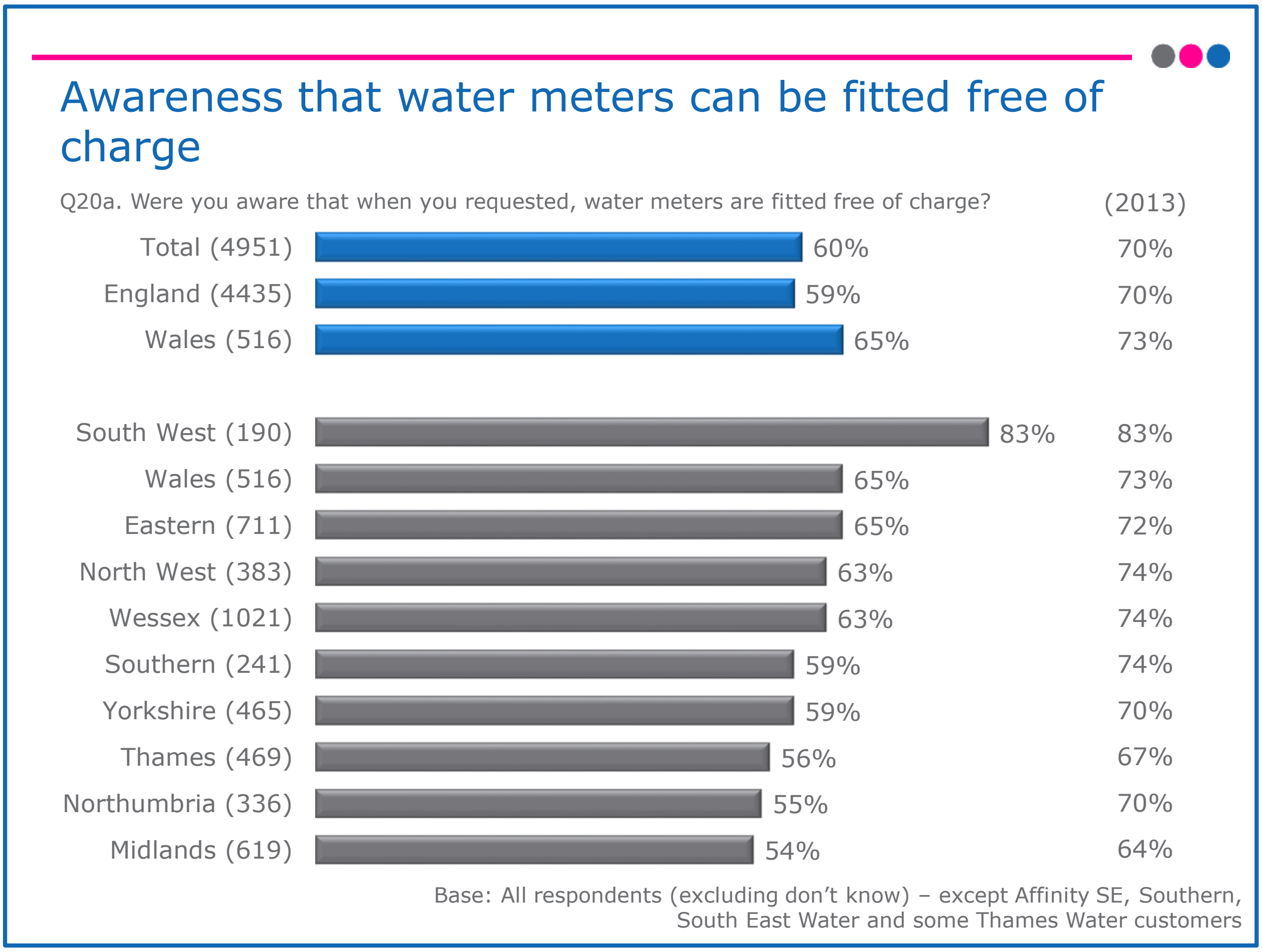
Figure 27: Awareness that water meters can be fitted free of charge



3.4.3 Whilst more customers in Wales than in England are aware of being able to request a meter free of charge (65% compared to 59%), awareness in both countries is significantly less than in 2013.

3.4.4 Similarly, levels of awareness have fallen across all regions, with the exception of the South West, where it has remained the same.

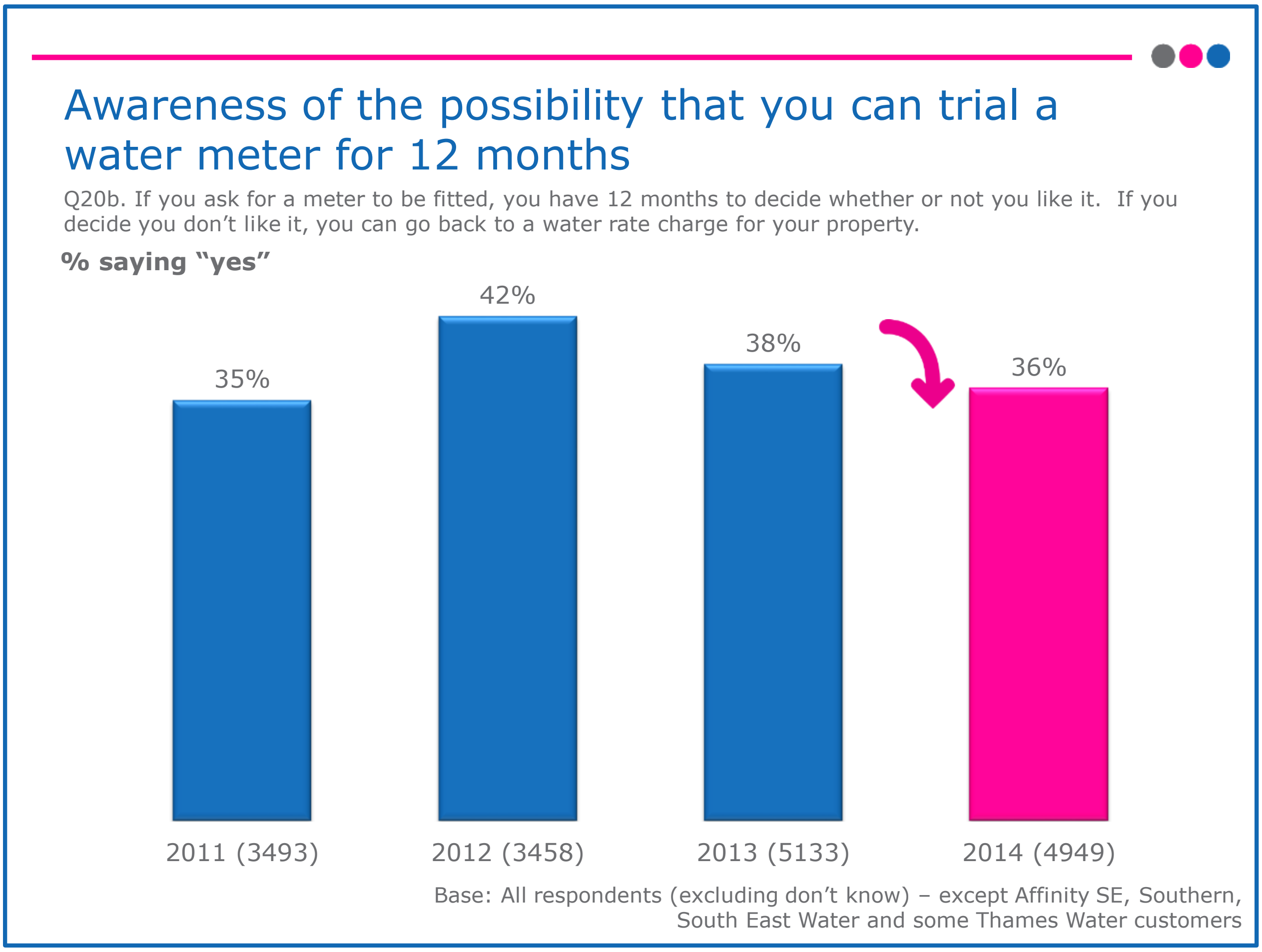
Figure 28: Awareness that water meters can be fitted free of charge by country and region



3.4.5 Far fewer customers are aware that, should they request a water meter, they have a 12 month window to reverse their decision at no cost to themselves. Again, awareness levels across the whole sample are significantly lower than a year ago (38% in 2013 compared to 36% in 2014) although the drop is smaller.

3.4.6 For unmetered customers, awareness they have a 12 month window to reverse their decision is lower than awareness of the free meter option, and at 29% is the same as in 2013.

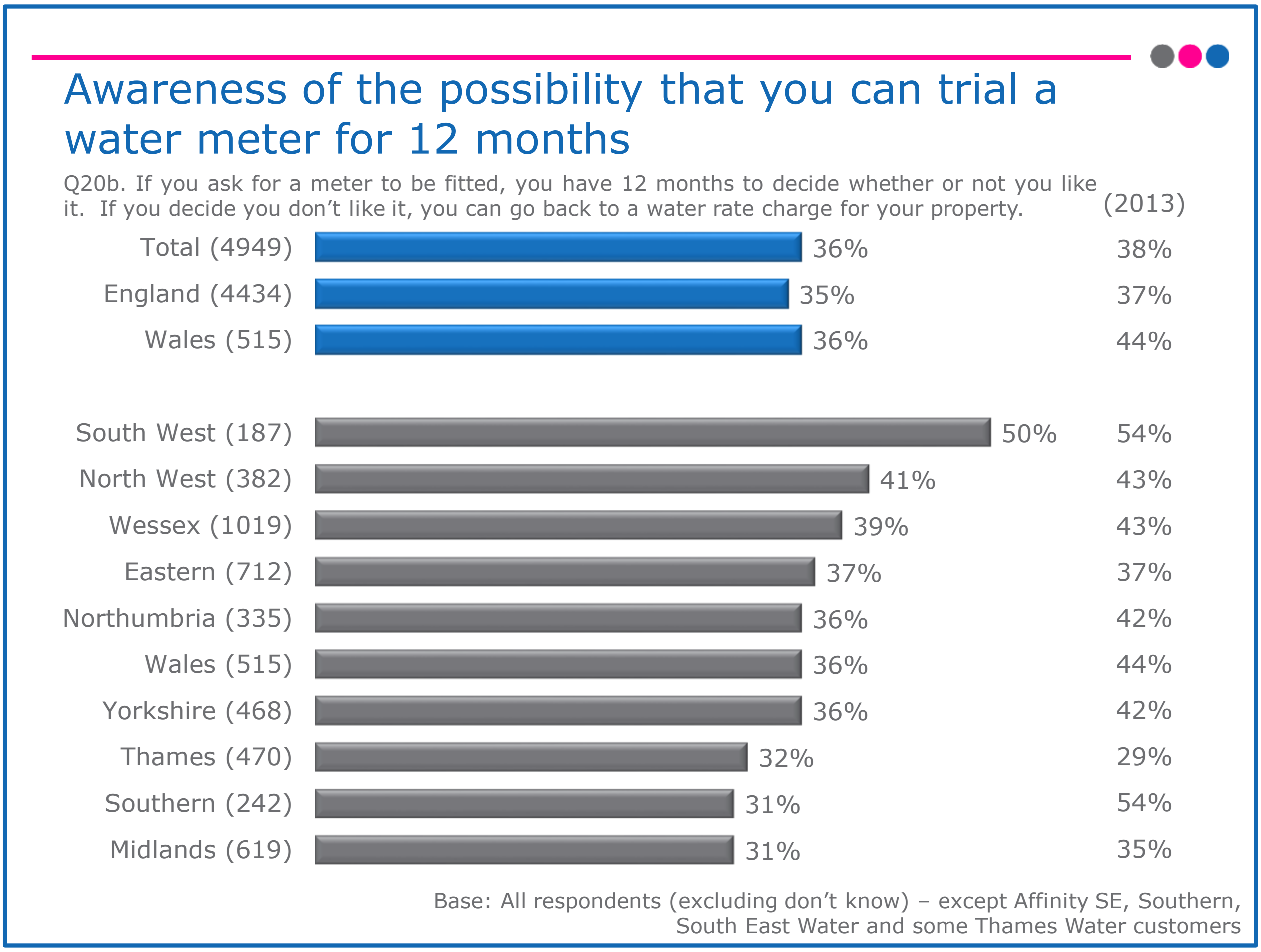
Figure 29: Awareness that water meters can be trialled for 12 months



3.4.7 There is no difference in awareness of the 12 month trial between English and Welsh customers.

3.4.8 Regional differences are similar to those for awareness of the free meter scheme; customers in the South West region have the highest awareness and customers in the Midlands have the lowest level of awareness along with customers in the Southern region[12].

Figure 30: Awareness that water meters can be trialled for 12 months by country and region

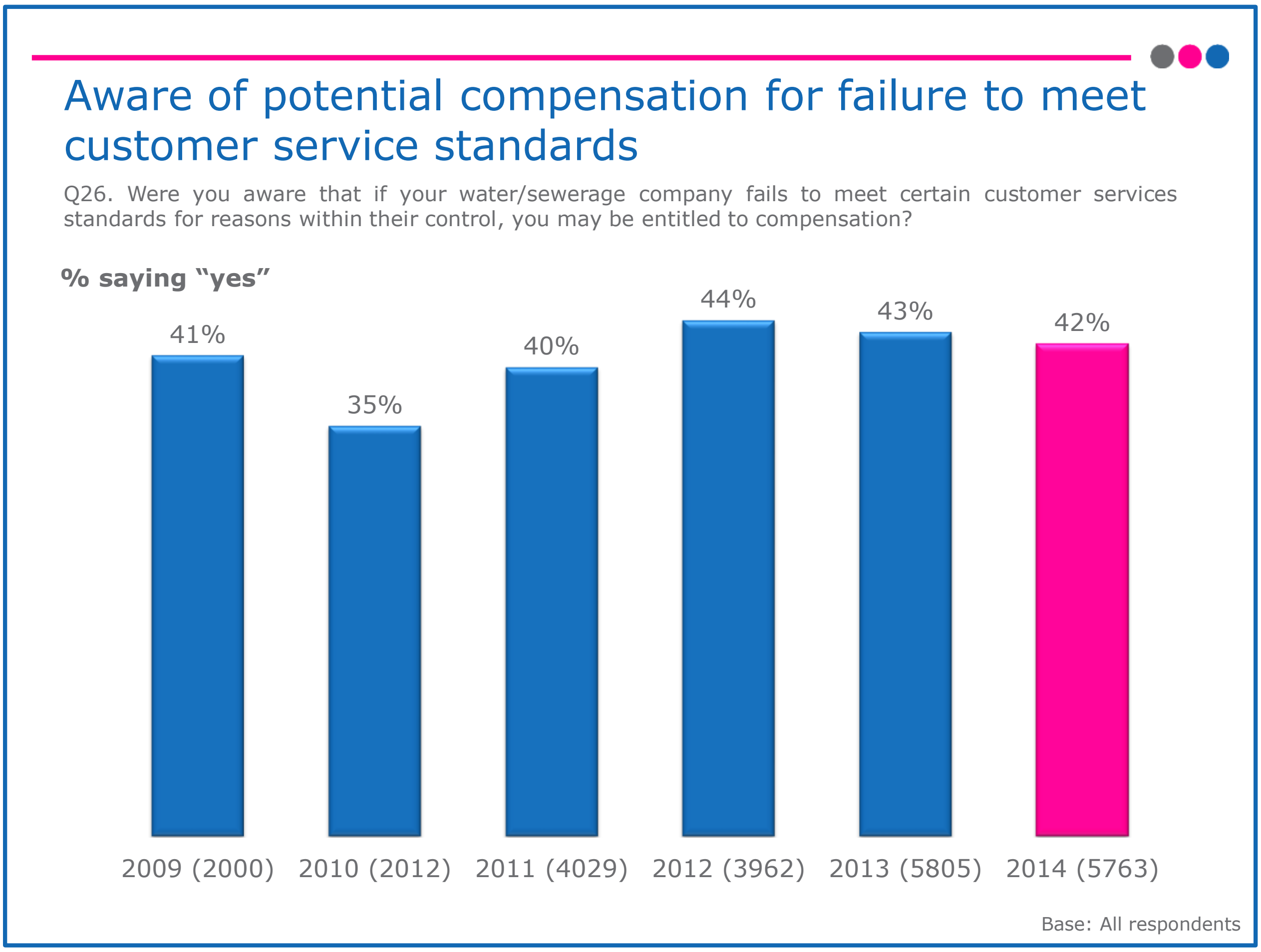


[12] Customers in areas where there are compulsory metering programmes were not asked this question – this mainly affects the Southern region – Affinity South East and Southern Water in the main, and South East Water/Thames Water to a lesser extent.

3.5 Service standards and compensation

3.5.1 The Guaranteed Service Standard (GSS) scheme entitles customers to compensation if their water or sewerage service provider fails to meet minimum service standards for reasons within their control. Customers' awareness of this compensation scheme is little changed over the last four years and is almost the same in 2014 as in 2013 (42% compared to 43% in 2013).

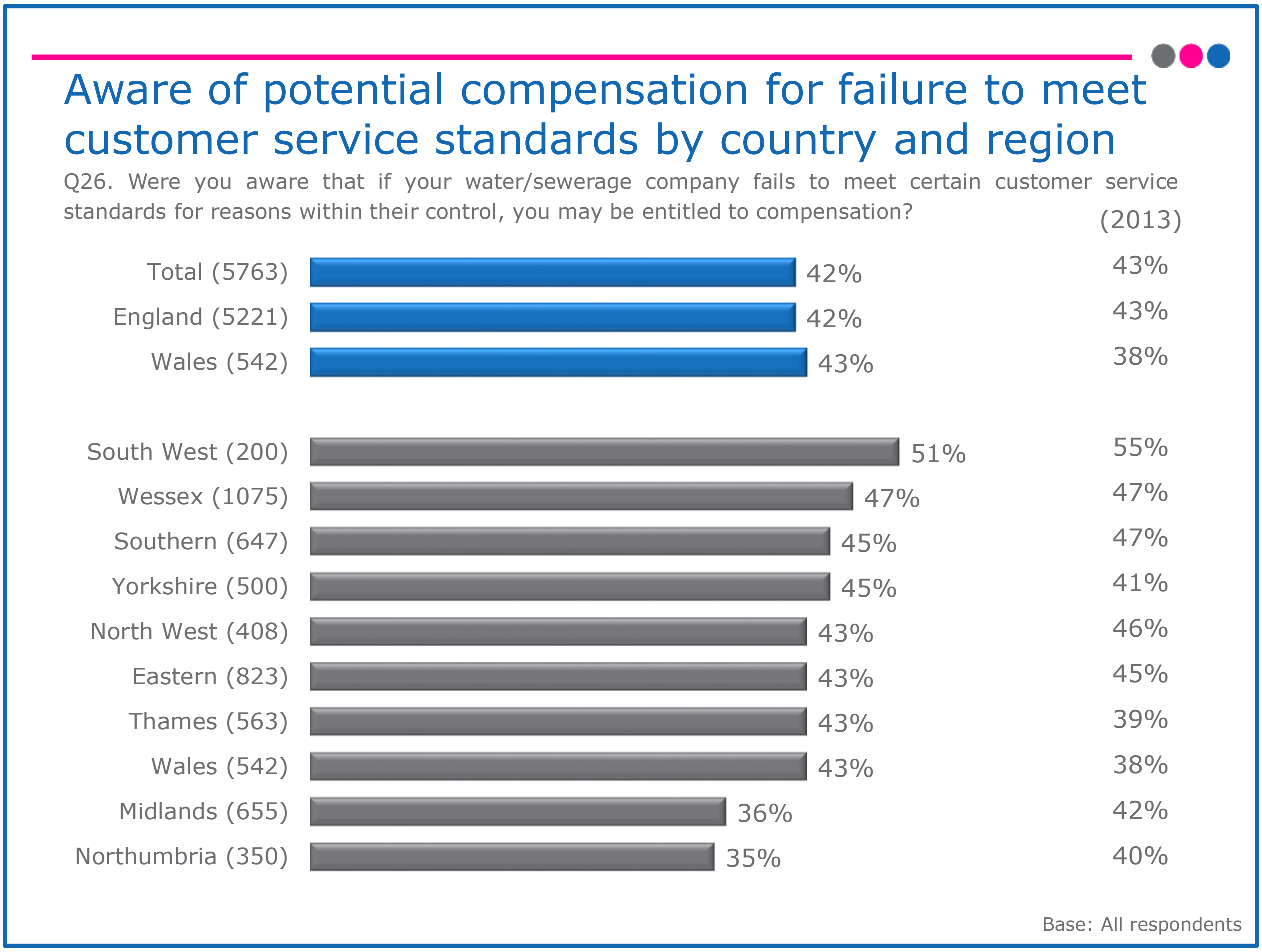
Figure 31: Awareness of Guaranteed Service Standard scheme



3.5.2 Awareness of the GSS scheme is virtually the same in England and in Wales (42% compared to 43%).

3.5.3 In terms of regional differences, awareness is significantly lower in Midlands and Northumbria than in all of the other regions. The picture is largely unchanged from 2013, apart from significantly fewer customers in the Midlands being aware that they could receive compensation for poor service standards (42% in 2013 compared to 36% in 2014).

Figure 32: Awareness of Guaranteed Service Standard scheme by country and region

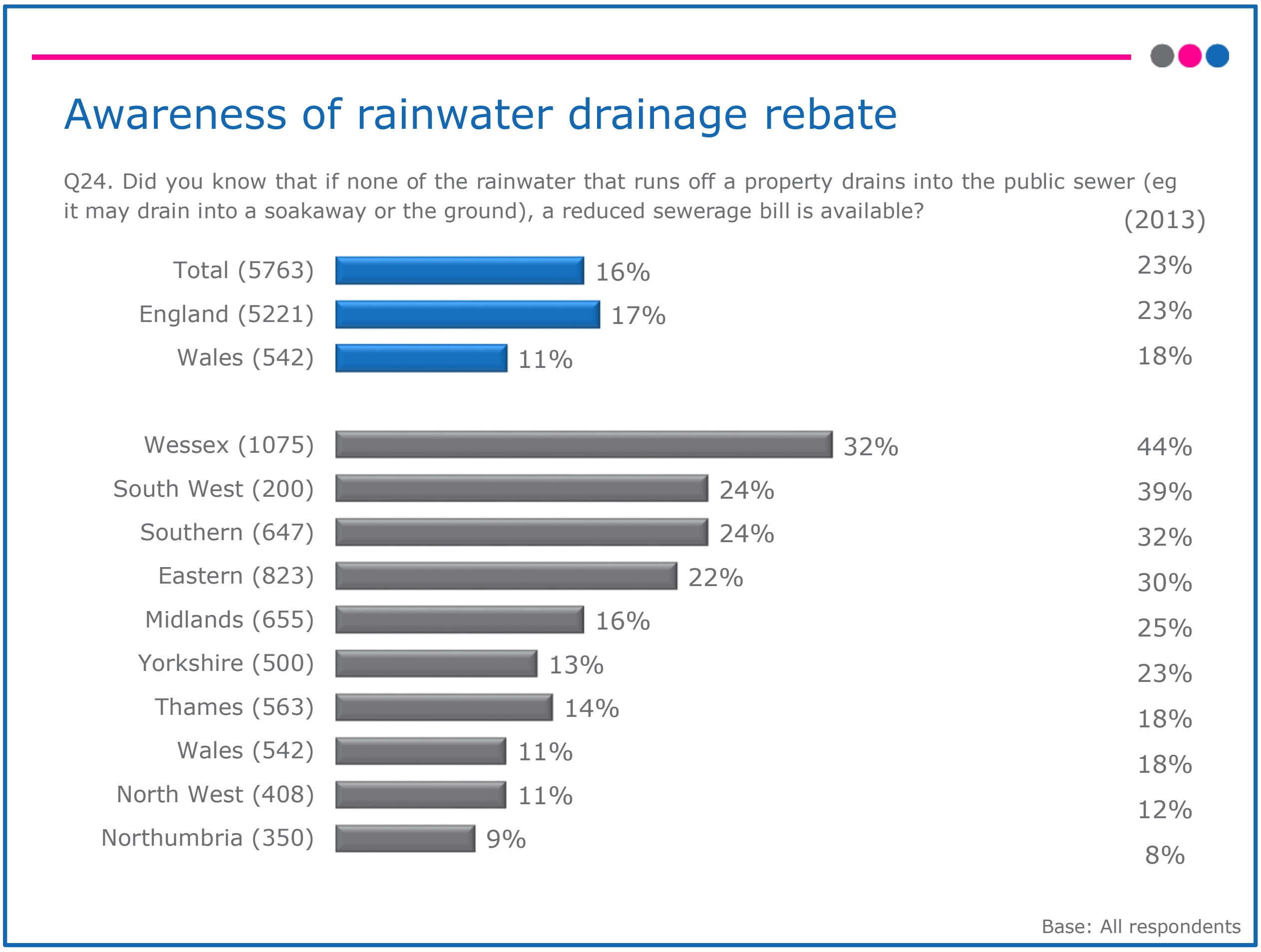


3.6 Awareness of rainwater drainage rebate

3.6.1 For the second year running, customers were asked if they were aware that a rebate on sewerage charges is available if none of the rainwater that runs off their property drains into the public sewer. Awareness of this "Surface Water (rainwater) Drainage Rebate" is significantly lower in 2014 than in 2013 across England and Wales and all regions except Northumbria and the North West, where the low levels of awareness are similar to last year. Awareness is still highest in Wessex and the South West regions, albeit at a lower level than in 2013.

3.6.2 Awareness of the rebate is significantly lower in Wales than England (11% compared to 17%).

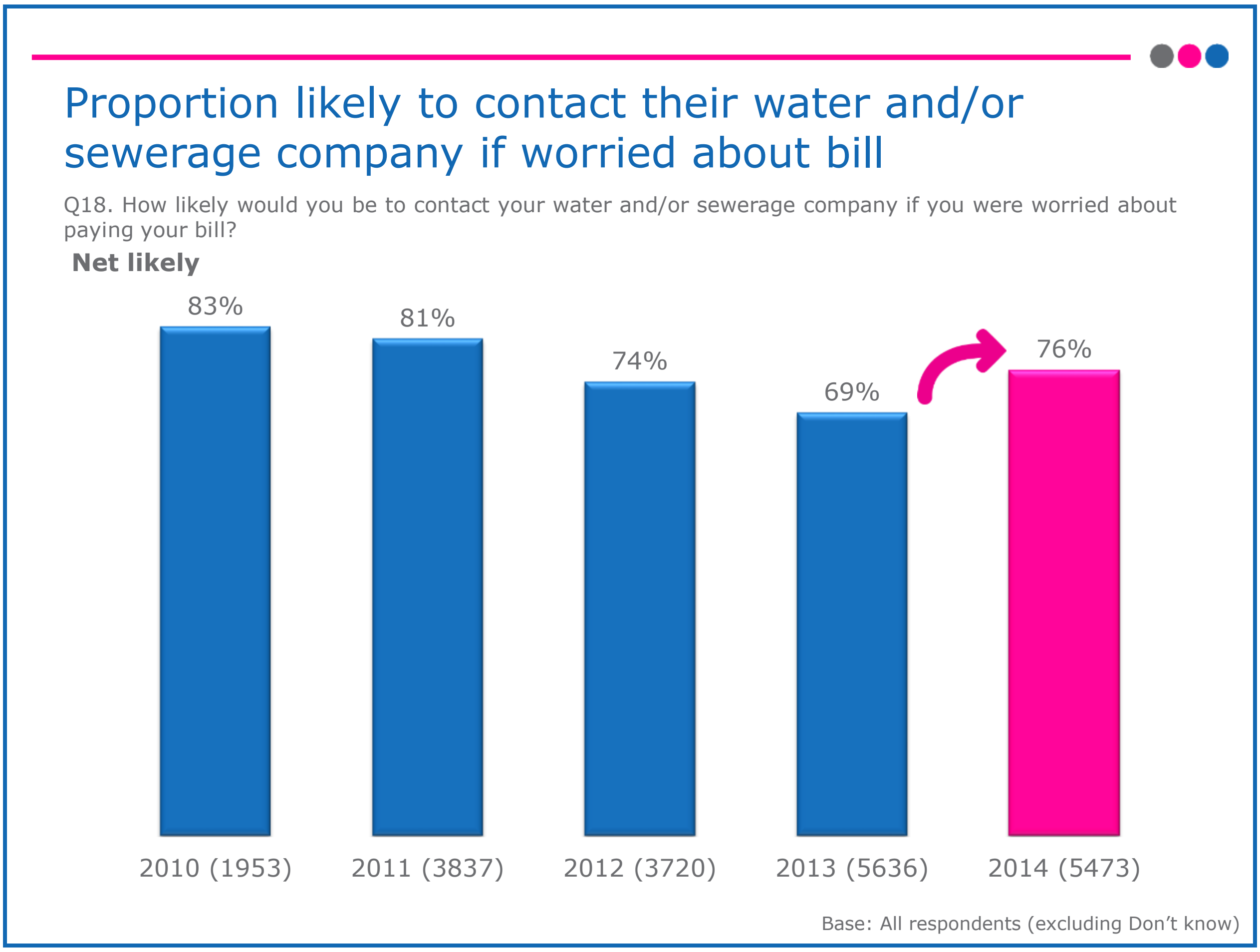
Figure 33: Awareness of rainwater drainage rebate



3.7 Contacting water companies if worried about bills

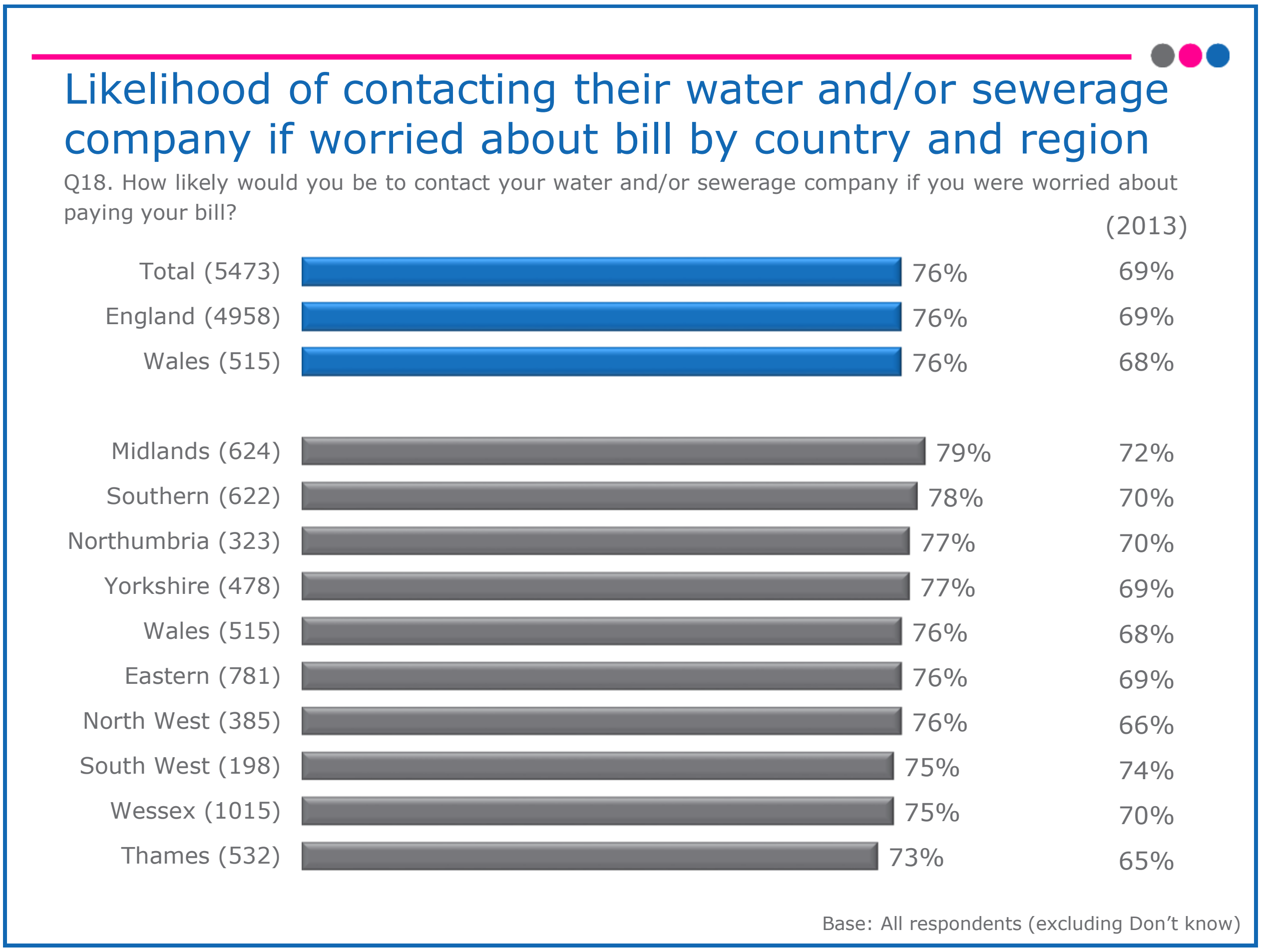
3.7.1 Three-quarters say they would contact their water company if they were worried about paying their bill. This is significantly higher than in 2013 (69%) and reverses the downward trend seen over the last three years.

Figure 34: Proportion likely to contact their water company if worried about paying their bill



3.7.2 The significant increase overall is repeated in England, Wales and all the regions, except the South West, where there is, however, still a small increase (up from 74% to 75% in 2014). Customers in the Midlands and Southern regions would be significantly more likely to contact their water company than those living in the Thames region (79% and 78% compared to 73%).

Figure 35: Proportion likely to contact their water company if worried about paying their bill by country and region



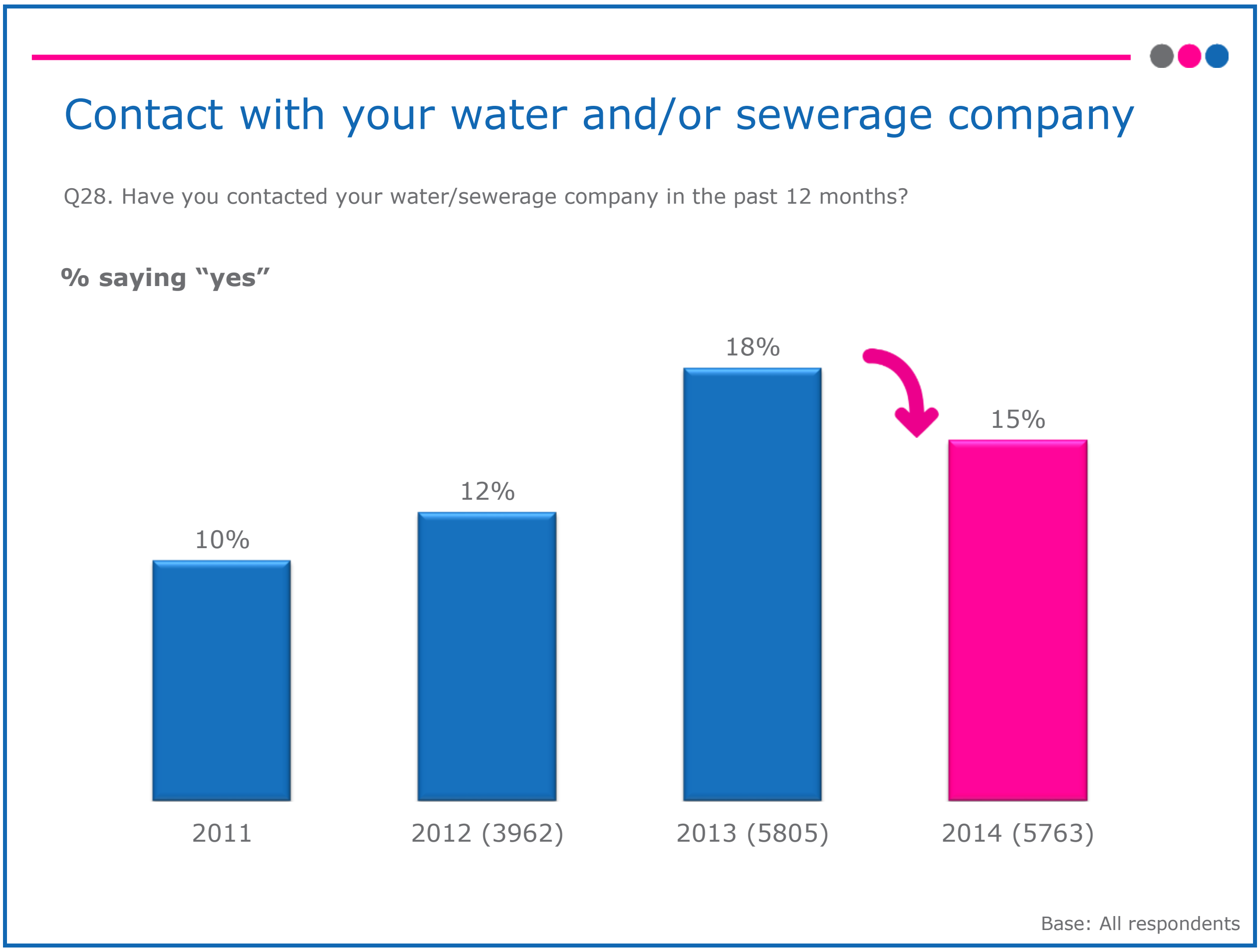
3.7.3 Those most likely to make contact if they are worried about paying their bill are:

- Women (80% compared to 72% of men)
- Younger customers; 80% of 18-29 year olds falling to 69% of customers aged over 75
- Those with internet access and/or a landline compared to those without (77% compared to 71% not online and 70% who only make calls on their mobile)
- Those with children at home (79% compared to 76% of those without)
- Renters, particularly housing association tenants who we have seen are the most concerned about affordability (82% of housing association tenants, 80% of private renters, 77% of council tenants compared to 74% of owner occupiers)
- Benefit recipients (80% compared to 74% in a household not receiving any benefits)

3.8 Contacting water companies

3.8.1 Significantly fewer people made contact with their water company in 2014 than in 2013 (15% compared to 18%).

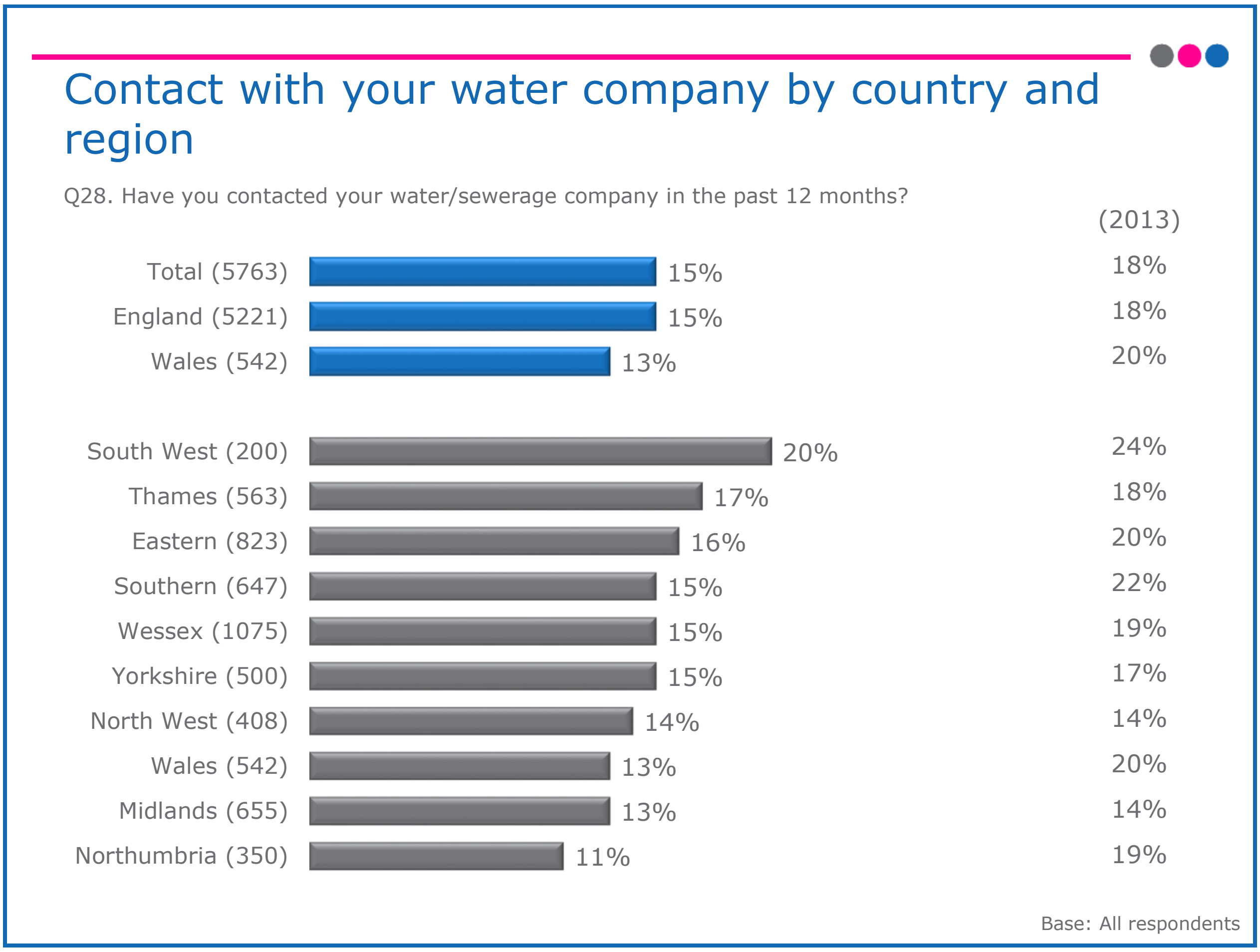
Figure 36: Contact with water company



3.8.2 The reduction in contact levels is significant in England and in Wales as shown below.

3.8.3 Contact levels dipped in all but one region (the North West stayed the same) but only fell significantly in the Northumbria and Southern regions. Almost twice as many customers contacted their provider in the South West as in Northumbria (20% compared to 11%). Contact levels are also significantly higher in the Thames and Eastern regions (17% and 16%) when compared with Northumbria.

Figure 37: Contact with water company by country and region



3.8.4 Those most likely to have contacted their water company include:

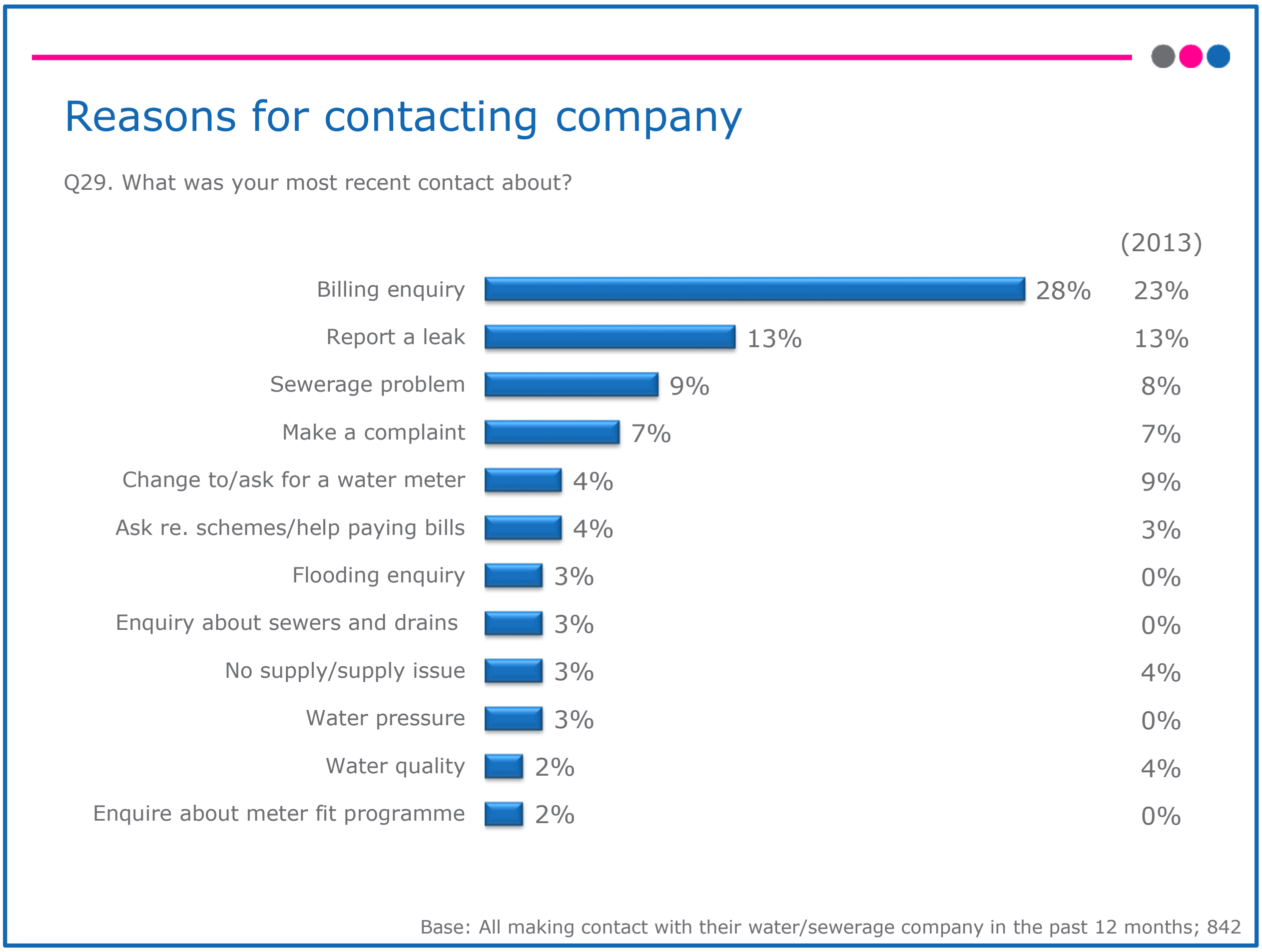
- Younger people (26% of 18-29s and progressively less in each age group down to only 6% of the over 75s)
- Those with internet access (16% compared to 9% of those without) and those who only use mobile (21% compared to 14% of those who use a landline for calls). The latter is probably linked to age, in that younger people are more likely to use only a mobile and not have a landline
- Metered customers (17% compared to 13% unmetered)

- People living in a household with a disabled person but without a disability themselves (20% compared to 16% of disabled customers and 14% of customers without a disability).
- People with young children (22% of those with children aged 5 and under compared to 16% of those with older children and 15% of customers with no children in the household)
- Housing association tenants and private renters (21% and 20% compared to 13% of owner occupiers and 14% of council tenants).

3.8.5 The main reasons for making contact are to make a billing enquiry (28%), followed by reporting a leak (13%), similar to previous years. Billing enquiry contacts have increased significantly since 2013 (28% in 2014 compared with 23% in 2013). Interestingly, although higher levels of metering have been recorded this year, and more metered customers have contacted about their bills (30% metered compared with 27% unmetered), the increase in contact since 2013 is greater for unmetered customers (from 21% to 27%) than metered (from 26% to 30%).

3.8.6 Fewer people had contacted the company to request a meter (4% compared to 9% in 2013) which could tie in with the lower awareness of being able to request a meter and trial it.

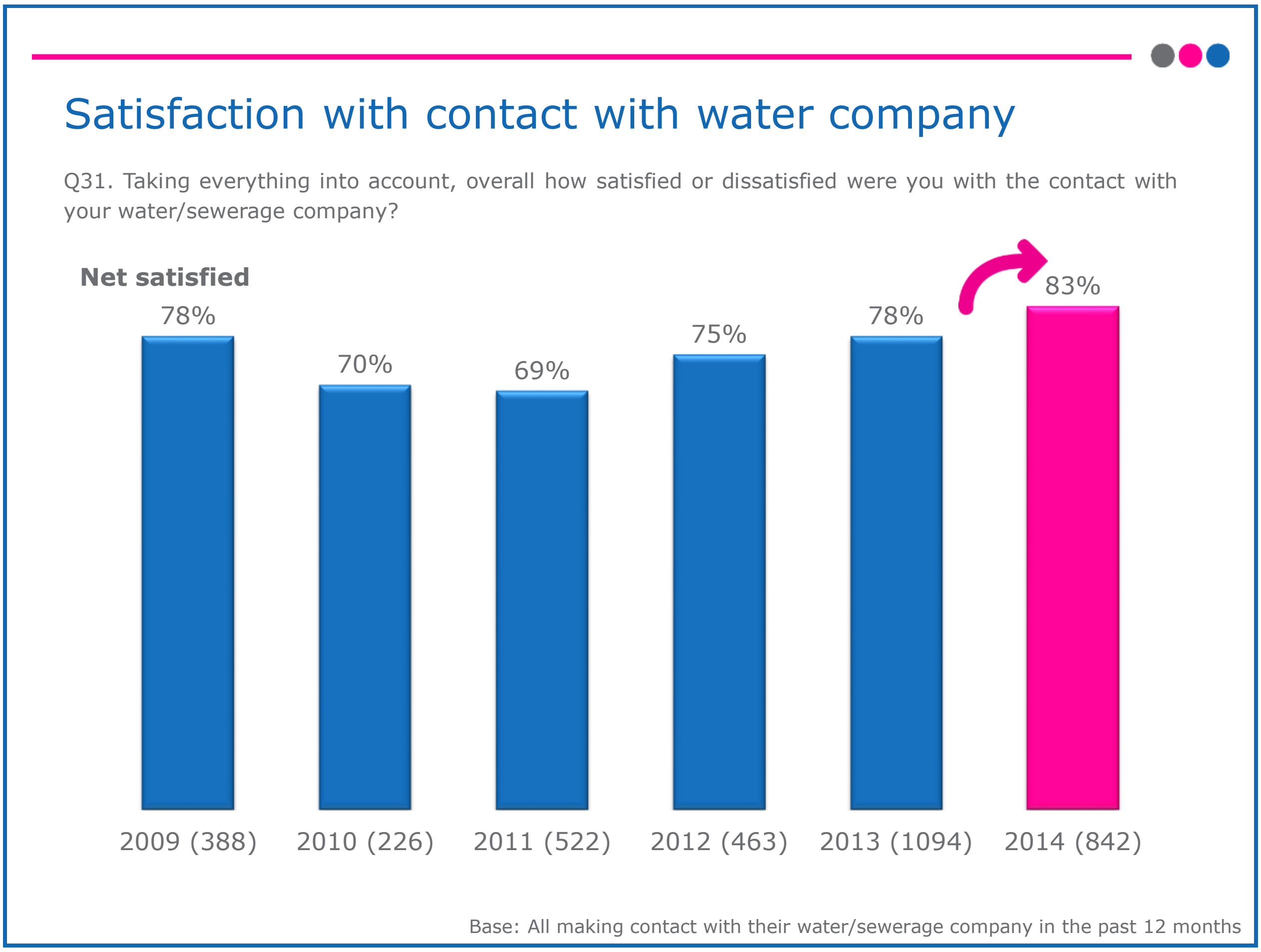
Figure 38: Reasons for contacting water company



3.8.7 Irrespective of region, customers are generally calling about similar issues, with the exception of water quality. Contacts about water quality are very low across England and Wales (2%) but higher in Northumbria and the South West (11% and 8%). However, to put the findings into context, this is only a handful of customers for each region. Similar to 2013, the three regions with the highest proportion of metered customers (South West, Eastern and Southern) have the highest number of billing enquiries (38%, 33% and 34% respectively), although the differences with other regions are not significant.

3.8.8 Satisfaction with contact handling is at its highest level since 2008, with over 8 of 10 customers being satisfied (83%), which is a significant increase on the 2013 figure of 78%.

Figure 39: Satisfaction with contact with water company

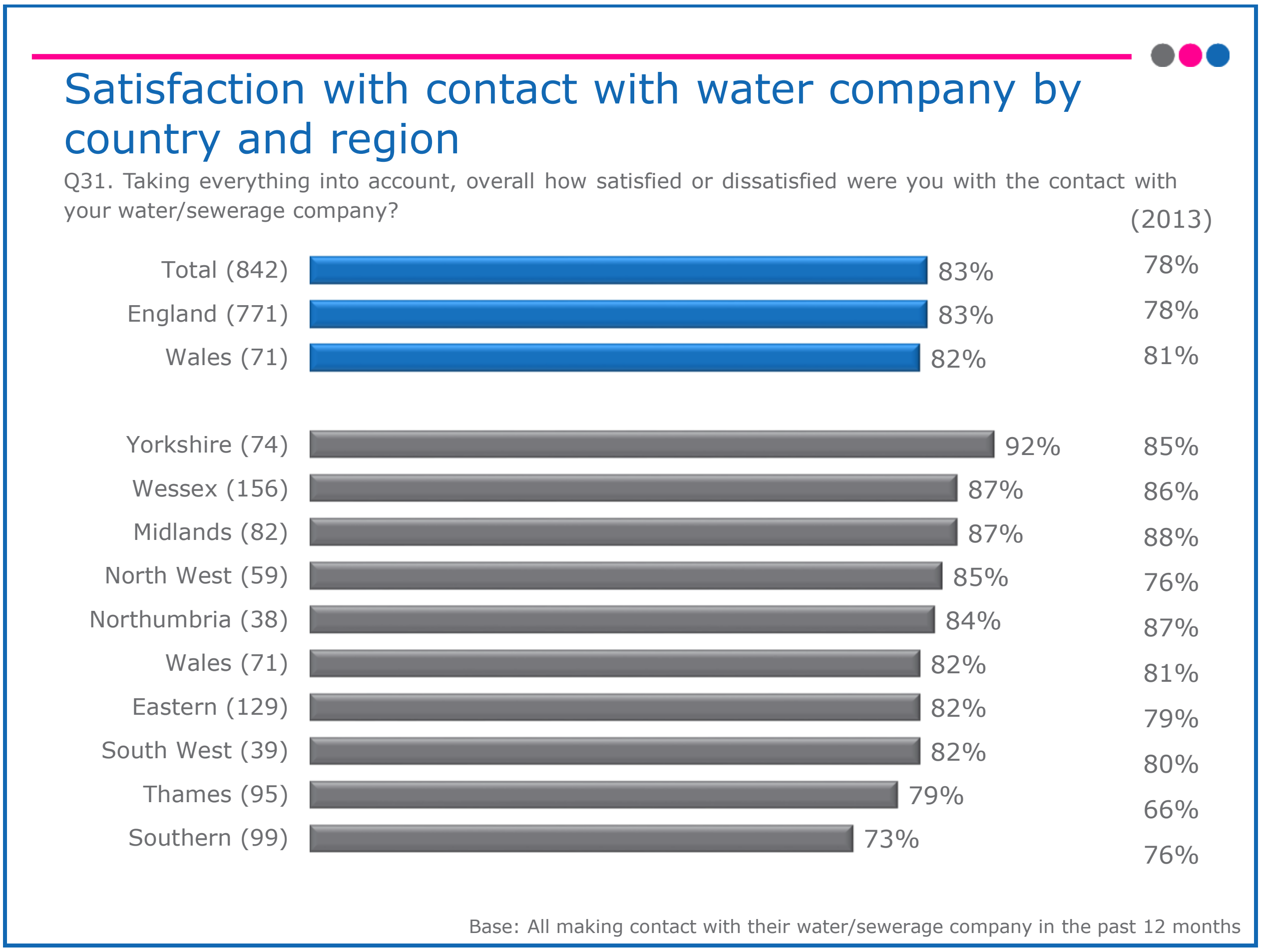


3.8.9 The increase in satisfaction overall is largely accounted for by English customers, whose satisfaction levels have risen from 78% to 83% whilst satisfaction in Wales is little changed (82% compared to 81% in 2013).

3.8.10 Satisfaction levels are high across the regions, with eight achieving 80% or more. The biggest increase in satisfaction is seen in the Thames region which, whilst one of the two areas not achieving the 80% mark, has improved from 66% in 2013 to 79% this year.

3.8.11 At company level, customers of Wessex and Dee Valley Water are the most satisfied with contact (94% and 95%) and Southern and Essex & Suffolk Water the least (both 69%).

Figure 40: Satisfaction with contact with water company by country and region



3.8.12 Reason for contact also impacts on overall satisfaction, with significantly lower ratings for respondents who made contact with a complaint (53%) rather than a general enquiry like a billing enquiry (79%), to report a leak (87%) or a sewerage service query (80%).

3.8.13 A new question was included in the 2014 to measure the amount of effort customers feel it takes to get their query answered. Half of customers (52%) are putting in the amount of effort they expected and a higher proportion say it took "less" than "more" effort. Overall, one in five customers said it took them more effort than expected (19%). However, on balance, customers in all but the Southern region are expending less effort than they expect when they contact their provider.

Figure 41: Effort required to get query answered

Effort required to get query answered

Q32. And overall, how much effort did it take you to get your query answered?

	% who have contacted in past 12 months	% Effort Taken		
		More than I expected	About what I expected	Less than I expected
Total (842)	15%	19%	52%	29%
England (771)	15%	19%	52%	29%
Wales (71)	13%	14%	49%	37%
Northumbria (38)	11%	18%	58%	24%
Thames (95)	17%	14%	58%	28%
Eastern (129)	16%	22%	53%	25%
Wessex (156)	15%	18%	51%	31%
North West (59)	14%	17%	51%	32%
South West (39)	20%	21%	51%	28%
Wales (71)	13%	14%	49%	37%
Southern (99)	15%	30%	49%	20%
Midlands (82)	13%	20%	48%	33%
Yorkshire (74)	15%	24%	45%	31%

Base: All respondents contacting

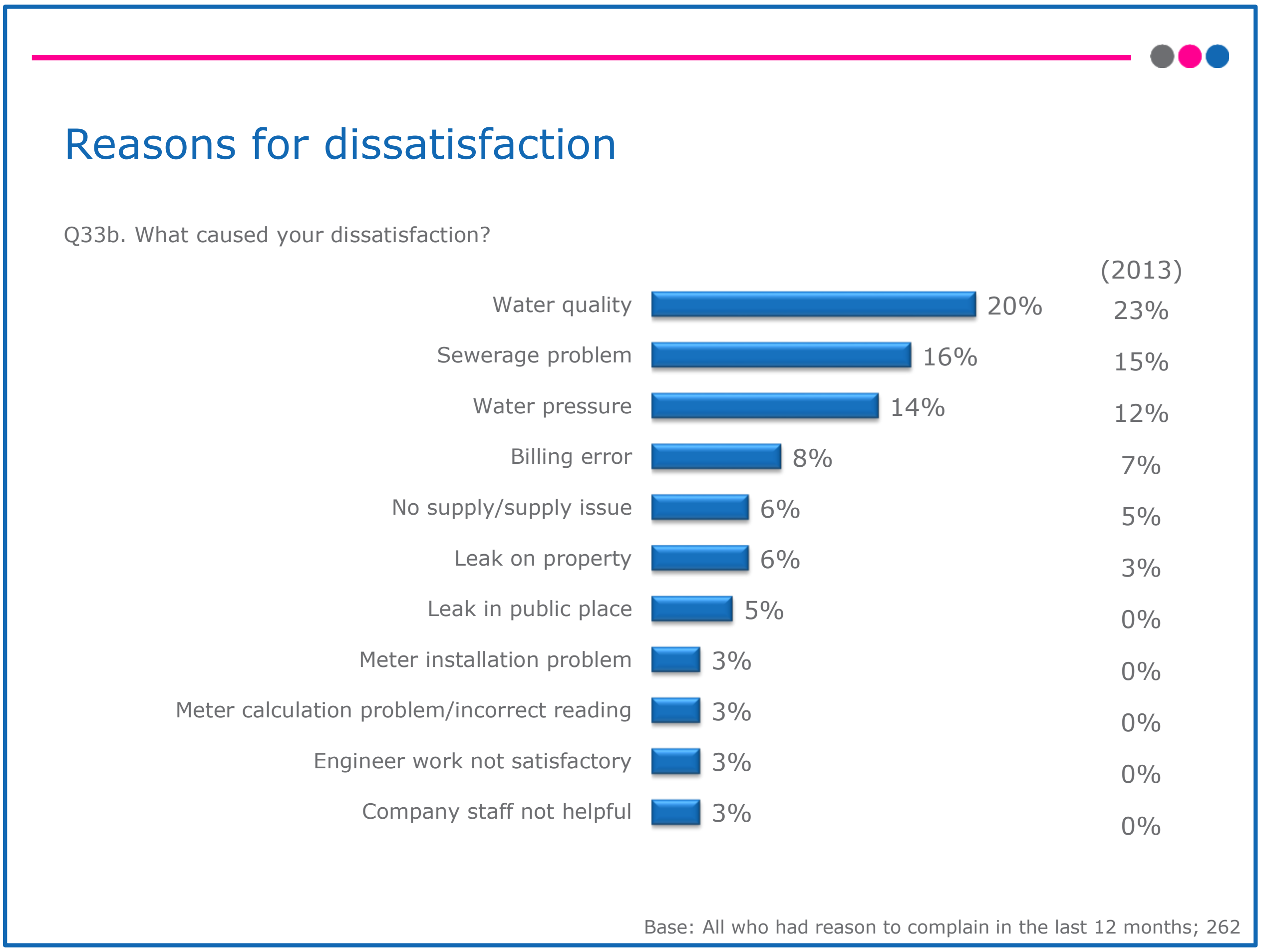
3.8.14 There is very little difference amongst customer groups regarding the effort it takes to get queries answered. Those who find it harder than they had anticipated include:

- Metered customers (22% compared to 15% of those unmetered)
- Housing association tenants (26% compared to 8% of council tenants)
- The Dissatisfied and Unfair clusters (38% and 30% compared to 10% of the Very Satisfied segment)

3.8.15 In the past 12 months 7% of those contacting their water and/or sewerage company did so to complain, which represents only 1% of the total number of customers interviewed. However, a further 4% felt they had reason to complain about their service but chose not to. These two figures combined mean that 1 in 20 customers overall (5%) think they have a complaint.

3.8.16 The main causes of complaint are operational issues (i.e. water quality (20%), sewerage problems (16%), and water pressure (14%)) rather than billing problems (i.e. billing error 8% and incorrect meter readings (3%)).

Figure 42: Reasons for dissatisfaction[13]



[13] Base size includes both customers who had reason to complain but didn't and those who actually complained

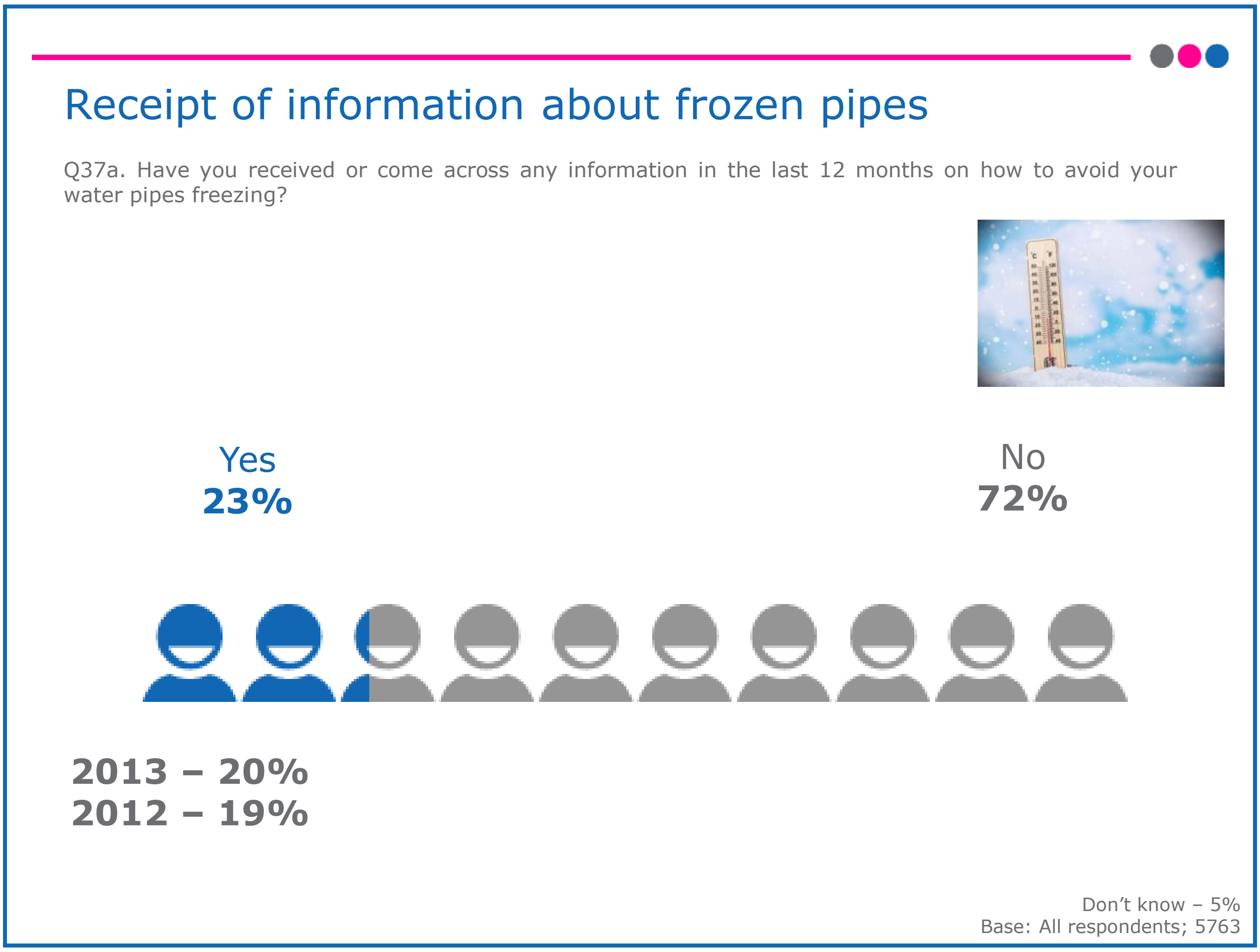
3.8.17 Of those who felt they had cause to complaint over the last 12 months but didn’t, over a fifth did not complain because they doubted their water or sewerage company’s willingness to help them (14% thinking they wouldn’t help and 8% having already contacted them about the same issue and hadn’t got any help). The main barriers to complaining are very similar to 2013.

Figure 43: Barriers to complaining

3.9 Avoiding freezing pipes

3.9.1 Just under a quarter of customers (23%) recall receiving information about how to avoid freezing pipes. This is significantly more than in 2013 (20%).

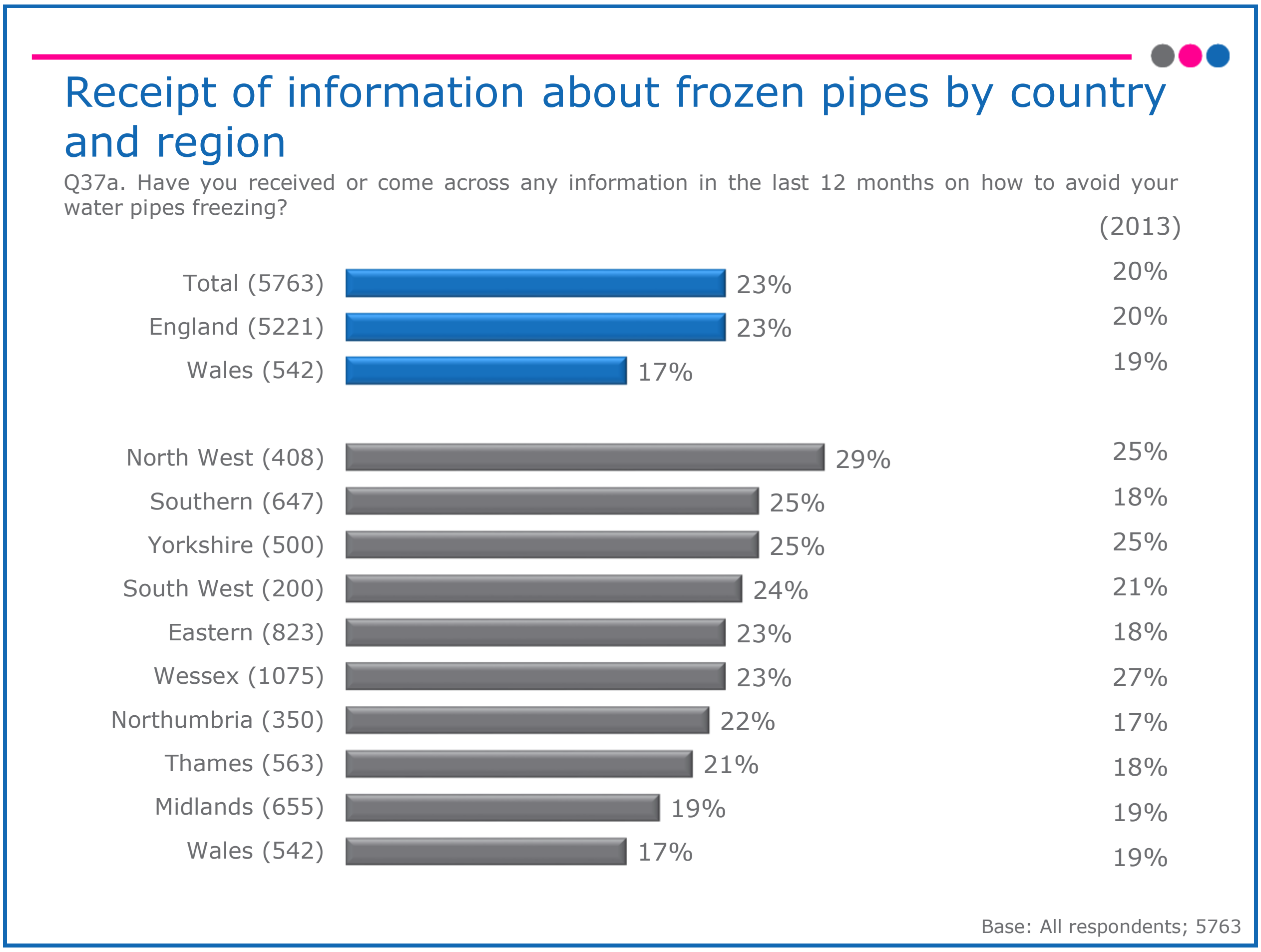
Figure 44: Receipt of information about avoiding frozen pipes



3.9.2 Customers in England are more likely to recall receiving this information than customers in Wales (23% compared to 17%), where recall was similar in 2013. Recall amongst customers in the North West (29%) is significantly higher than in six other regions.

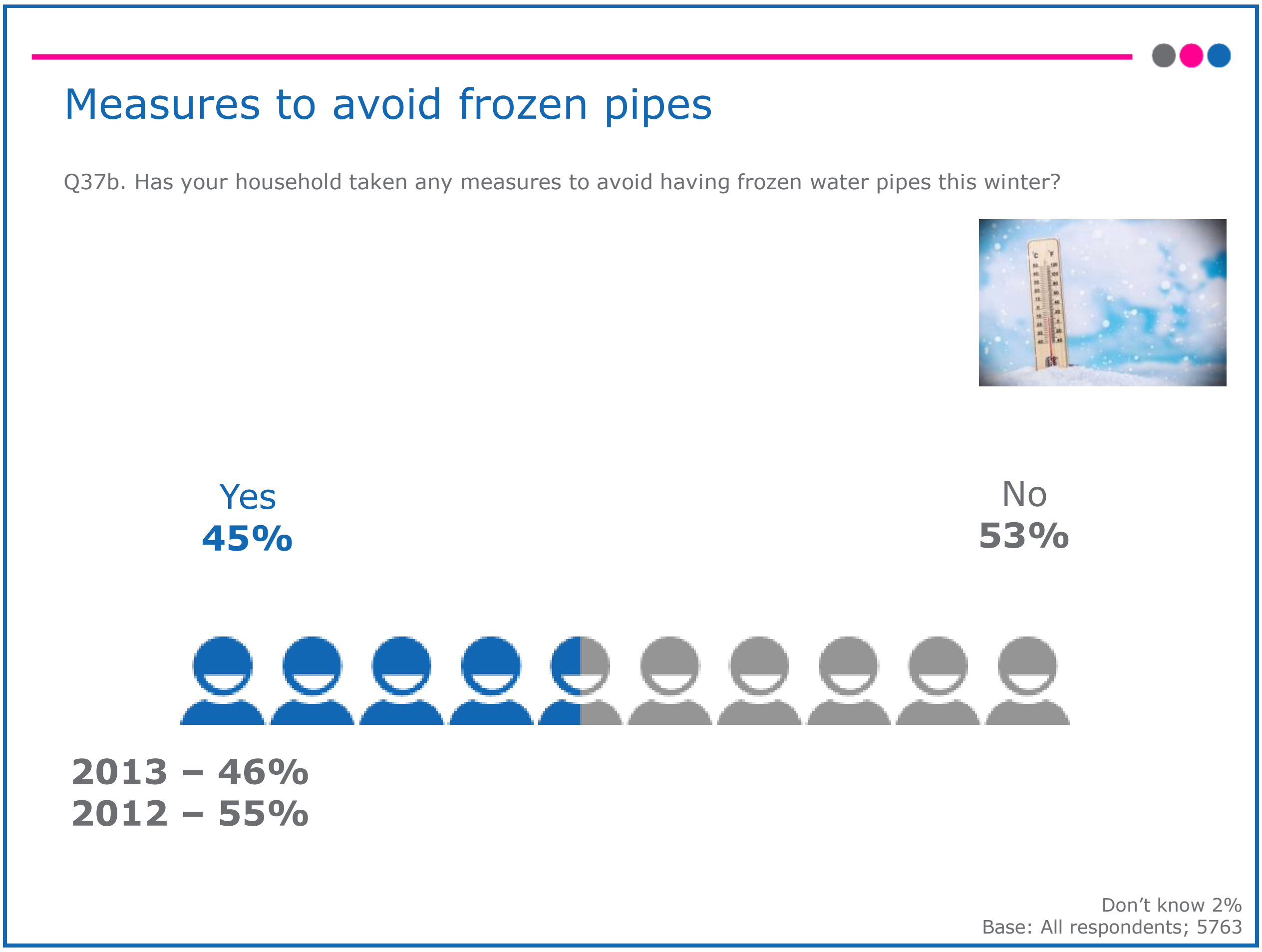
3.9.3 There are very few differences between customer groups; the main significant differences are between owner occupiers (24%) and housing association renters (27%) who are significantly more likely to recall receiving information than private renters (20%) and council tenants (19%).

Figure 45: Receipt of information about frozen pipes by country and region



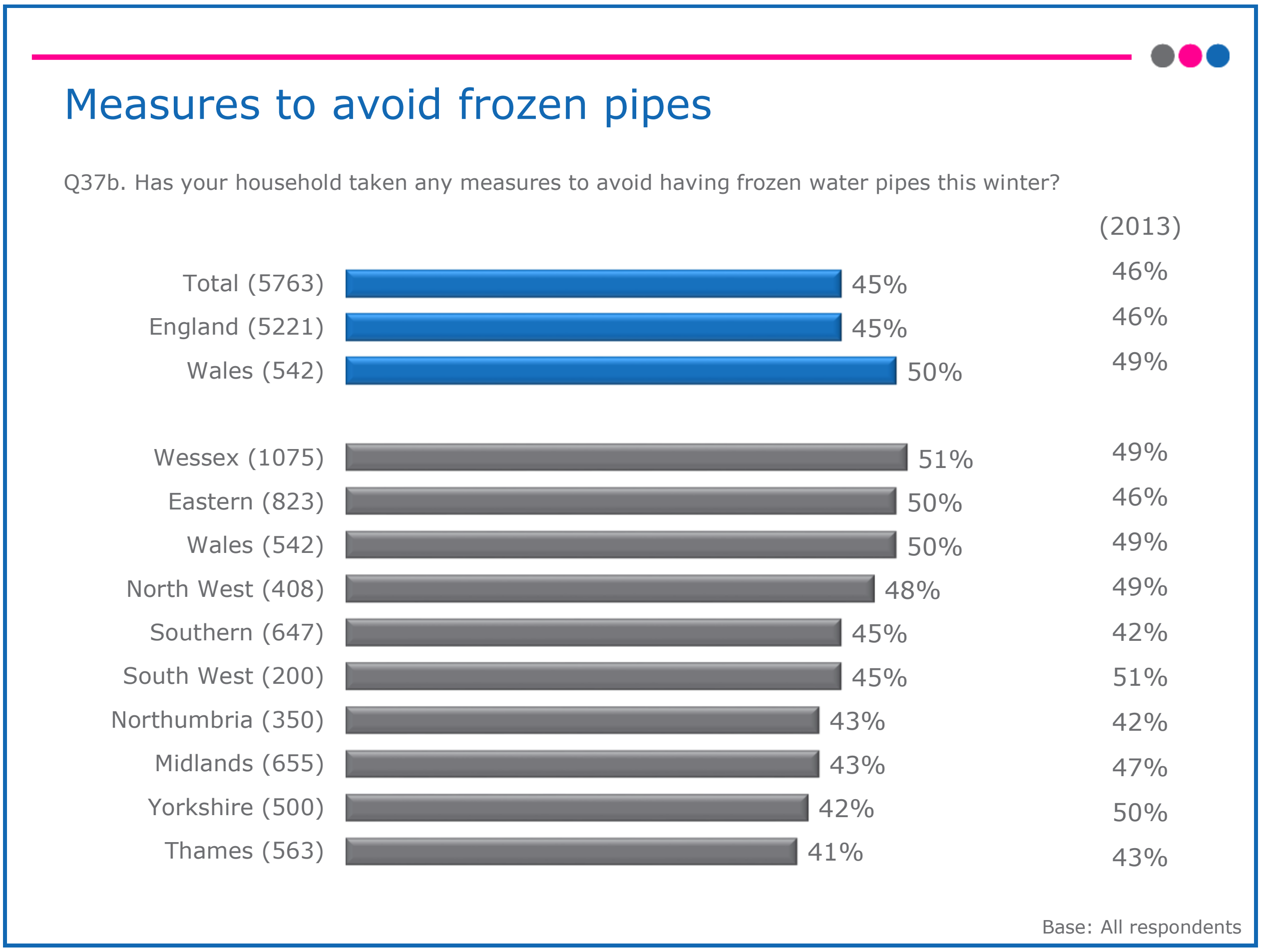
3.9.4 The proportion of customers who have taken measures to avoid frozen pipes is similar to 2013 (45% in 2014 compared to 46%).

Figure 46: Measures to avoid frozen pipes



3.9.5 More people have taken steps to avoid frozen pipes in Wales than in England (50% compared to 45%) and in the Wessex and Eastern regions (51% and 50%). Welsh customers were least likely to recall receiving information but were amongst those most likely to have taken action.

Figure 47: Measures to avoid frozen pipes by country and region



4. Water on tap

This chapter first presents customers' views on satisfaction with various aspects of their water supply and the service as a whole before moving on to their understanding of who is responsible for water pipe maintenance.

Key trends

- Customers continue to have high satisfaction their overall water service.
- Satisfaction with water hardness/softness is still some 20% lower than for other aspects of the water supply service, and customers continue to be most satisfied with reliability of supply.
- Nearly three-quarters of homeowners know they are responsible for maintaining the water pipes within their property's boundary, down slightly from 2013.

Key changes since 2013

- There has been a small but significant increase in overall satisfaction with the water supply service over the year (93% to 94%).[14]
- Three aspects of the service have also seen significant increases: safety (92% to 94%), taste and smell (87% up to 90%) and hardness/softness (68% to 77%).

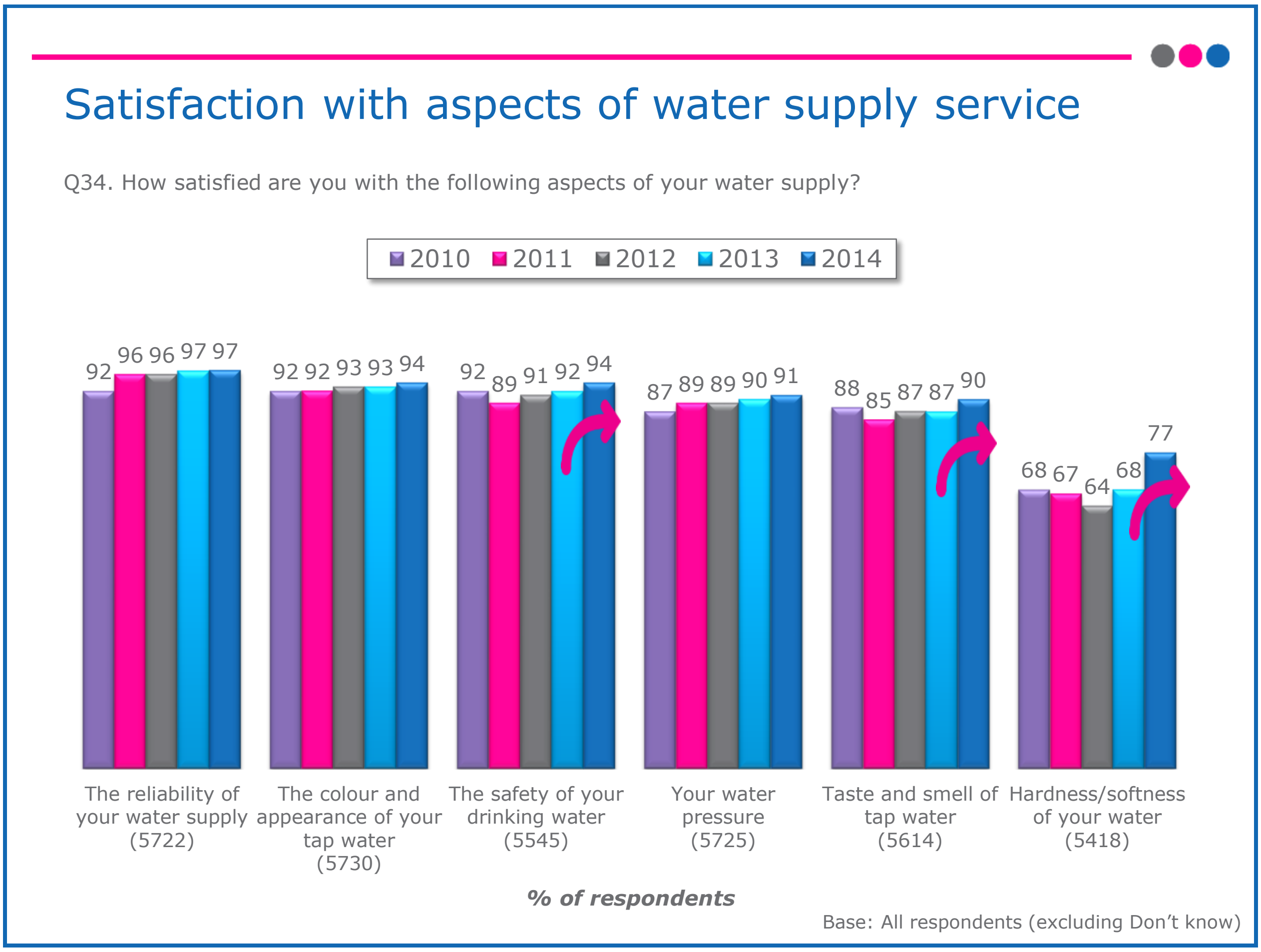
[14] The large sample size and the fact the percentages are close to 100% contribute to a significant difference at 1%.

4.1 Satisfaction with water supply

4.1.1 Satisfaction with various aspects of water supply remains at a very high level, with over 90% of customers happy with reliability, colour and appearance, water pressure, safety and taste and smell of tap water. There has been a small, but significant increase since 2013 in satisfaction with safety (92% up to 94%) and taste and smell of tap water (87% up to 90%).

4.1.2 Although customers are relatively less satisfied with the hardness/softness of their water, over three-quarters (77%) are happy with it, which is a significantly larger proportion than the 68% who felt this way in 2013.

Figure 48: Satisfaction with aspects of water supply service



4.1.3 Customers in Wales are more satisfied with their water supply than customers in England with the significant differences more related to the water itself rather than its delivery. The biggest difference concerns the hardness/softness of water, where nearly all Welsh customers (94%) compared to just over three-quarters of English customers (76%) are satisfied.

4.1.4 Customers in the Northumbria region and Wales are most happy with all aspects of their water supply, whilst those in the Southern and Thames regions are the least happy. Low water pressure appears to be an issue for some customers in the North West, as it is the only region where satisfaction levels dip below 90%.

Figure 49: Satisfaction with aspects of water supply service by WaSC region

Satisfaction with aspects of water supply service by WaSC region

Q34. How satisfied are you with the following aspects of your water supply?

Statement	Eastern	Wales	North-umbria	Mid-lands	South West	South-ern	Thames	North West	Wessex	York-shire
Colour & appearance of tap water	95%	97%	97%	93%	94%	91%	93%	95%	94%	95%
Taste & smell of tap water	91%	94%	94%	88%	88%	88%	89%	91%	89%	92%
Hardness / softness of your water	67%	94%	90%	80%	87%	65%	65%	91%	69%	86%
Safety of your drinking water	96%	96%	98%	94%	93%	93%	91%	94%	94%	96%
Reliability of water supply	98%	98%	99%	98%	96%	98%	96%	97%	98%	98%
Your water pressure	91%	92%	93%	91%	93%	92%	90%	88%	91%	93%

Highest satisfaction level

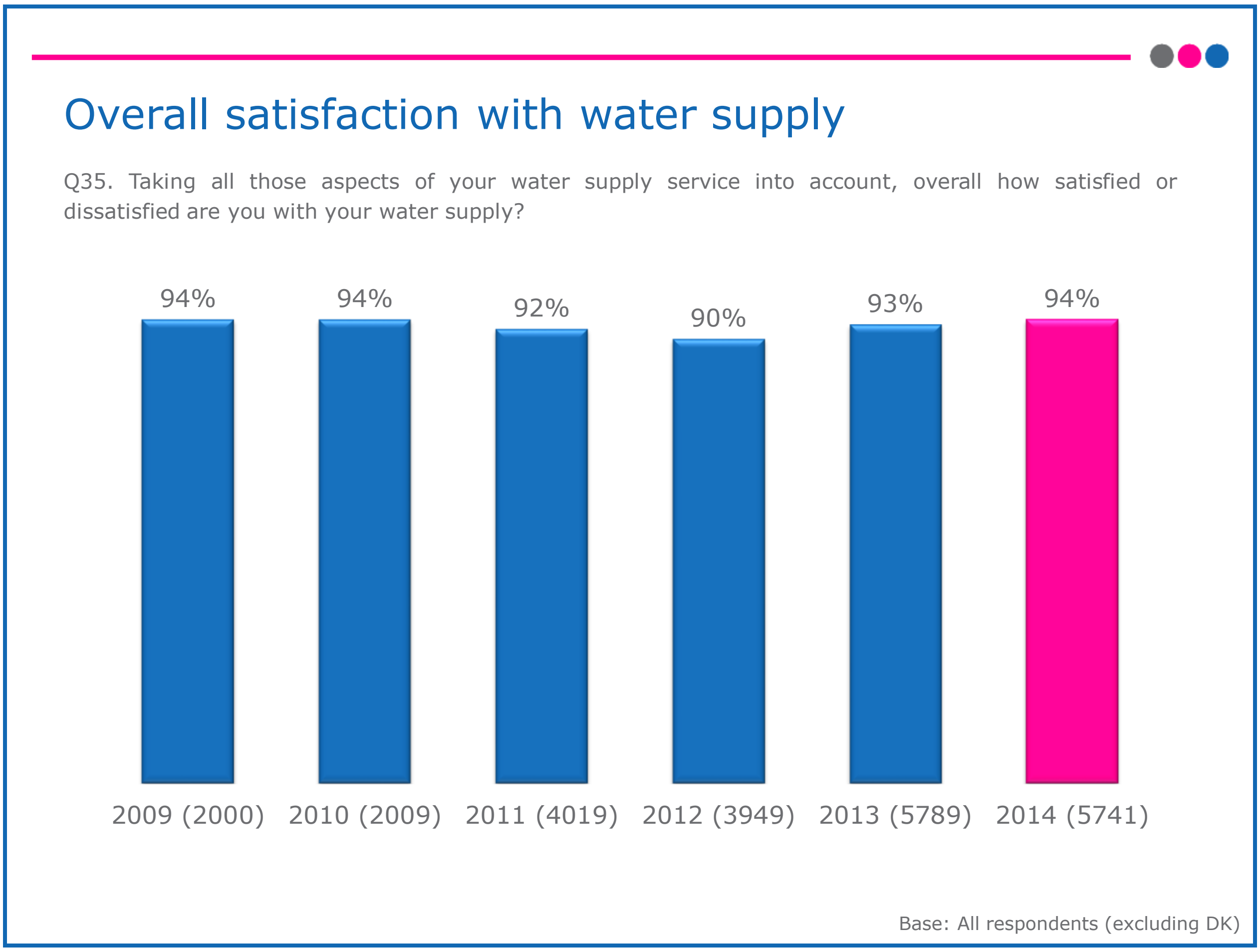
Lowest satisfaction level

Base sizes different for each attribute
Base: All respondents (excluding Don't know)

4.1.5 The over 75s are the most satisfied with all aspects of their water supply (except for hardness/softness where they think similarly to 18-29s who rate highest on this aspect).

4.1.6 The high ratings for individual aspects of the water supply underpin the very high levels of overall satisfaction. This year sees 94% satisfied compared with 93% in 2013.

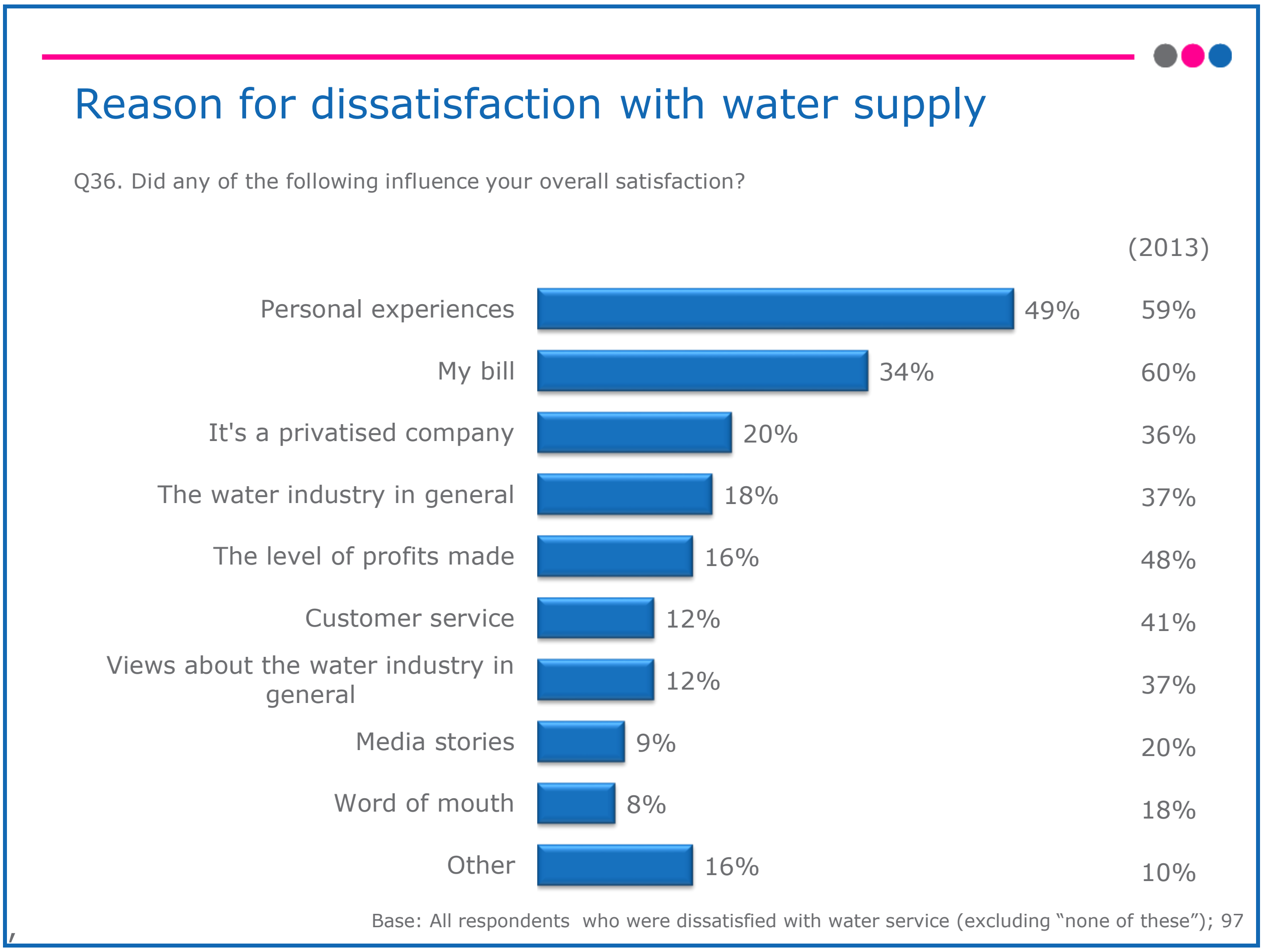
Figure 50: Overall satisfaction with water supply



4.1.7 The same very high levels of overall satisfaction are seen across customers in all regions of England and Wales, consistent with 2013. However, customers in Wales are significantly more likely to be very satisfied (69% compared to 59% in England). Customers in Northumbria remain the most satisfied (97%), as they were in 2013, with the Southern region the least satisfied this year (92%), taking over from Thames in 2013.

4.1.8 The small number of dissatisfied customers (n=97) were asked whether any of the reasons in Figure 43 influenced their overall satisfaction. This year personal experience (49%) features far more than negative perceptions of the water industry or dissatisfaction with bills, as was the case in 2013.

Figure 51: Reasons for dissatisfaction with water supply



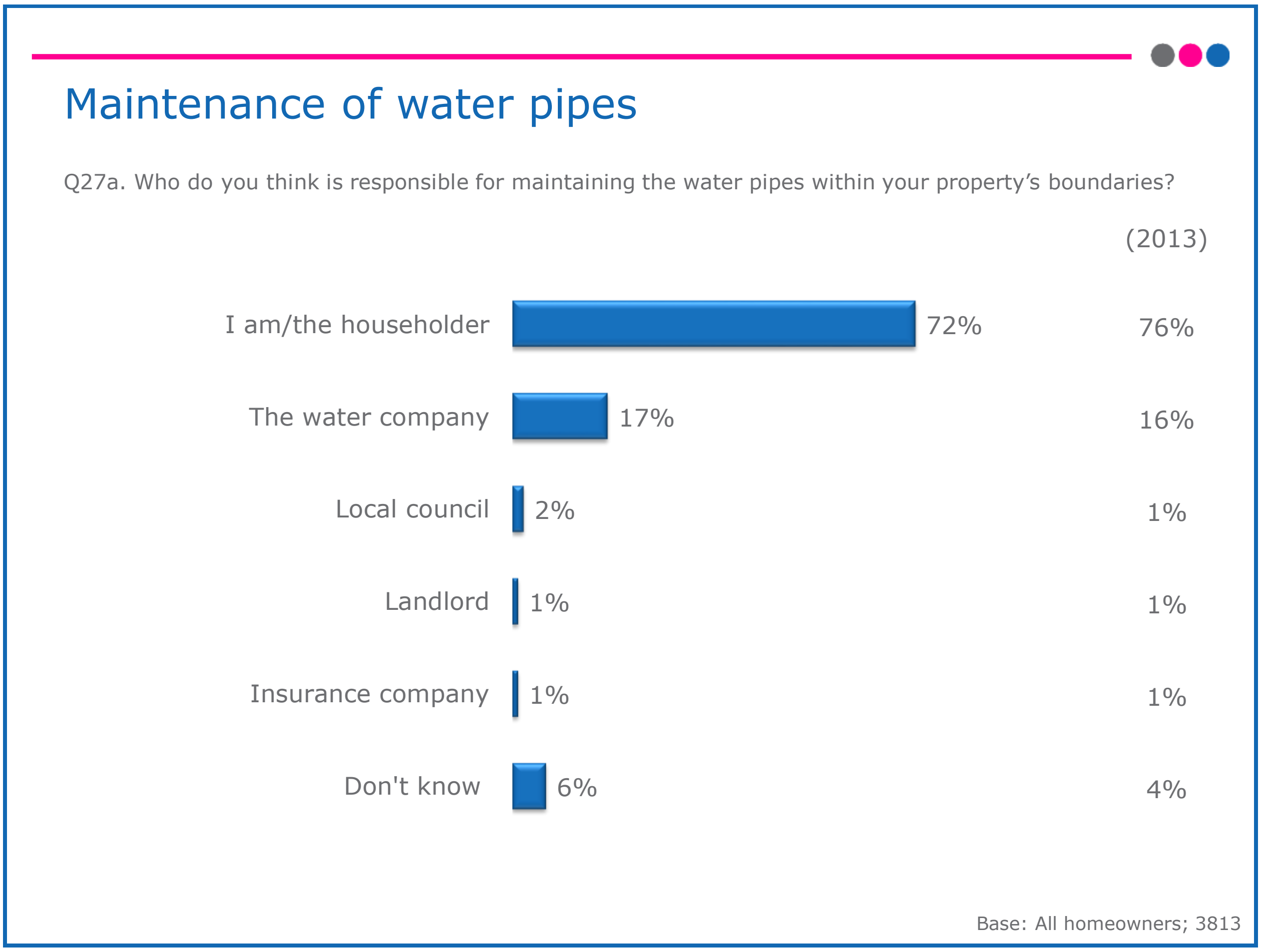
4.1.9 Around 1 in 10 customers (9%) are satisfied with their water services but dissatisfied with value for money. This is most prevalent in the Dissatisfied cluster, where two-fifths (41%) are satisfied with the water services but dissatisfied with value for money. Two-thirds (67%) say this is because prices have risen and 18% feel that the price isn't fair or that the system of charging isn't fair (and should be based on household size).

4.2 Maintenance of water pipes

4.2.1 Awareness amongst homeowners of their responsibility for maintaining water supply pipes within the boundary of the property has fallen since 2013. Seven in ten homeowners correctly identify themselves as being responsible (72%), leaving 28% either thinking that someone else has the responsibility or not knowing at all.

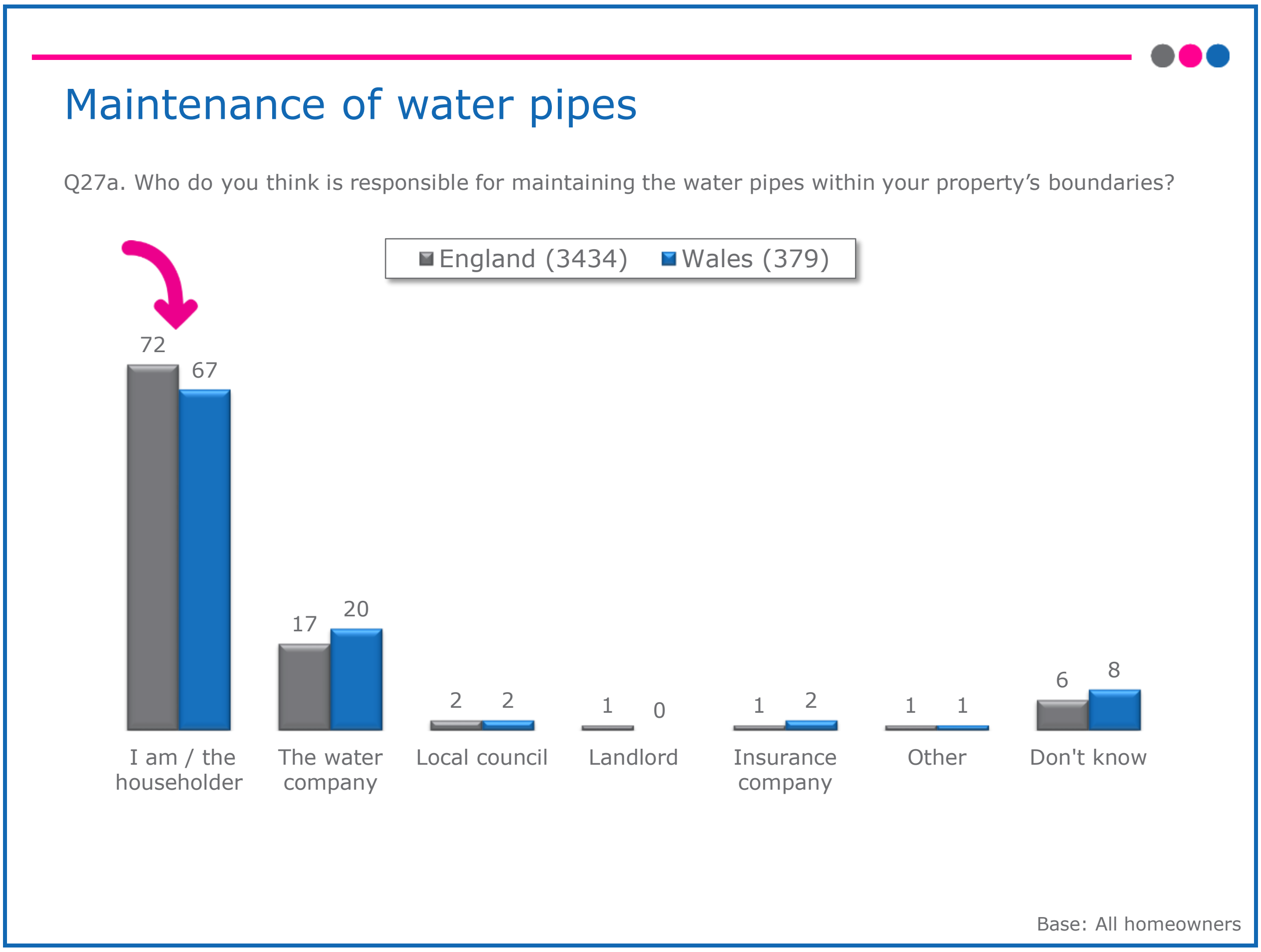
4.2.2 Confusion has increased since 2013 when 76% of homeowners knew they were responsible for the pipes on their property. Around one in six homeowners still think that the water company is responsible (17% in 2014 compared to 16% in 2013).

Figure 52: Maintenance of water pipes



4.2.3 There is a significant difference in awareness between homeowners in England and in Wales. More homeowners in England correctly think that they are responsible (72% compared to 67% in Wales).

Figure 53: Maintenance of water pipes in England and Wales



4.2.4 There is considerable variation in awareness between regions. Around four-fifths of home owners in the South West and Eastern regions correctly identify pipe maintenance is their responsibility (85% and 80%). These regions also have a high incidence of metered customers who are often informed of pipe ownership by the water companies when they have their meter installed, or become aware of their responsibility through a leak from their supply pipe. Levels drop to two-thirds or less in Northumbria (63%) and Wales (67%).

Figure 54: Awareness of maintenance of water pipes by region

Maintenance of water pipes

Q27a. Who do you think is responsible for maintaining the water pipes within your property's boundaries?

	Eastern (548)	Wales (379)	North-umbria (222)	Mid-lands (427)	South West (134)	South-ern (443)	Thames (340)	North West (279)	Wessex (718)	York-shire (323)
I am / house-holder	80%	67%	63%	68%	85%	79%	74%	67%	73%	71%
Water company	11%	20%	25%	21%	12%	10%	14%	18%	18%	22%
Local council	1%	2%	3%	1%	0%	2%	2%	3%	2%	2%
Landlord	0%	0%	0%	1%	0%	0%	2%	1%	0%	1%
Insurance company	1%	2%	0%	0%	0%	2%	1%	3%	1%	0%
Other	1%	1%	0%	2%	0%	1%	1%	0%	0%	1%
Don't know	5%	8%	9%	7%	3%	6%	7%	7%	6%	4%

Base: All homeowners

4.2.5 The following groups of homeowners are significantly less likely to be aware of their responsibilities regarding pipe maintenance:

- The unemployed/never worked/student and routine manual occupations groups (66% and 69% compared to 74% of higher social groups)
- Older people (60% of 75+ age group compared to 74% of those under 75)
- Non-metered customers (70% compared with 75% of metered)
- Ethnic minority households (55% compared to 74% of other customers)
- Benefit recipients (68% compared to 74% not on any benefits).

5. A sewerage system that works

This chapter begins with customers' views on what is appropriate to dispose of via the sewerage system. Satisfaction with various elements of the sewerage system then follows. Finally, the topic of responsibility for shared sewerage pipe maintenance is covered.

Key trends

- Tissues continue to top the list of products that customers think can be disposed of down the toilet (27% think this is fine).
- There is low awareness about the responsibility of sewerage companies to maintain shared sewerage pipes. Two-thirds of homeowners either assume incorrectly or do not know who is responsible. This is despite a significant increase in those identifying that the sewerage company is responsible (from 28% in 2013 to 33% in 2014).

Key changes since 2013

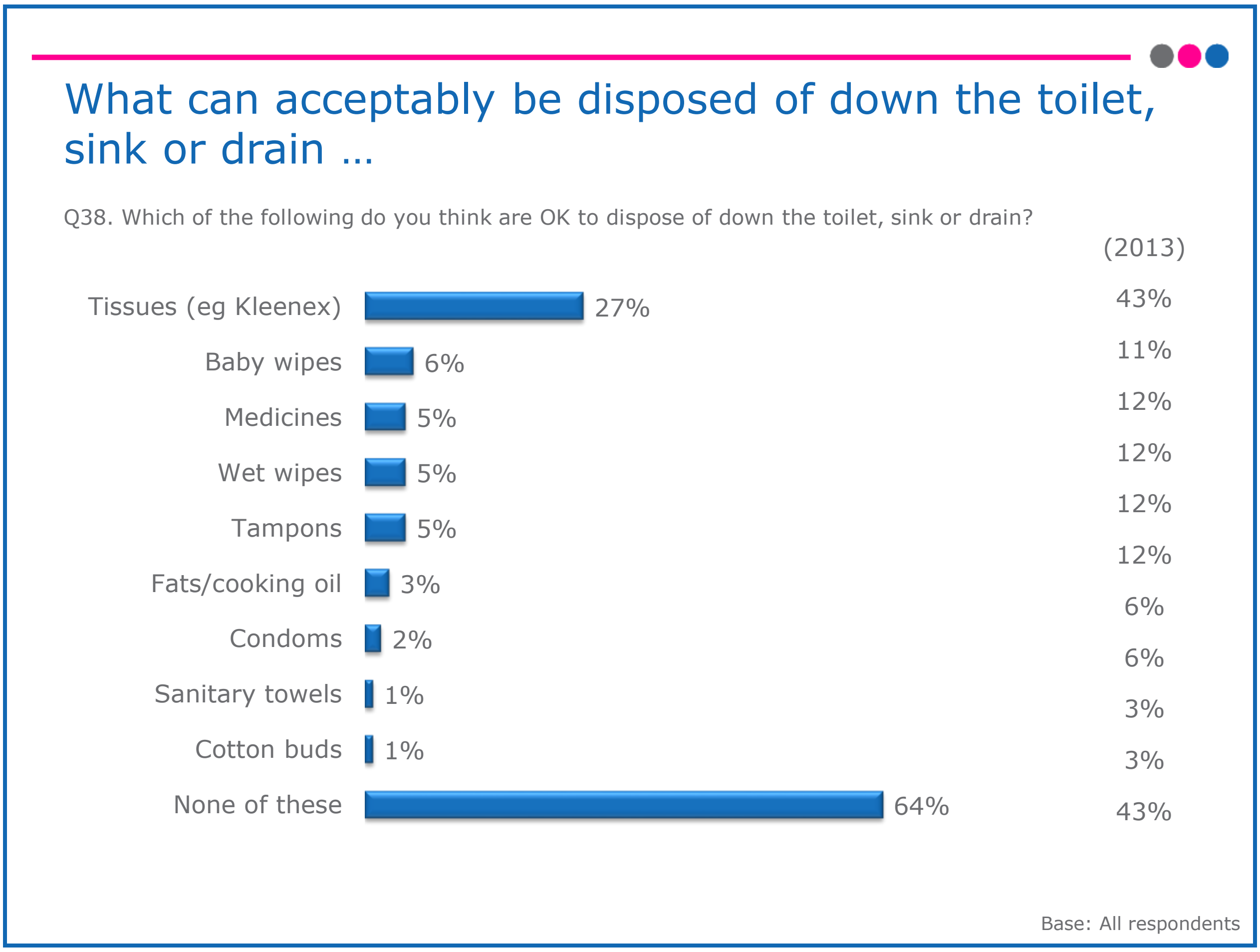
- Almost two-thirds (64%) of customers are aware of what should and should not be disposed of down the toilet, sink or drain, up from 43% in 2013.
- Overall satisfaction with sewerage services has increased significantly (from 87% in 2013 to 91% in 2014).
- Satisfaction with each of four key aspects of sewerage services has risen by an even higher margin to well over 80% (from around 70% in 2013).

5.1 What not to flush? Disposing of waste

5.1.1 Customers were prompted with a list of products and asked which, if any, can be disposed of down the toilet, sink or drain. There is a marked improvement in the number of customers correctly identifying that none of the items should be disposed of in this way (64% compared to 43% in 2013). The 2014 figure is much closer to the 2012 figure of 60%.

5.1.2 Customers appear to be better informed this year, as all products are mentioned significantly less than 2013. As in previous years, customers believe that tissues, more than any other product, are suitable for disposal down the toilet (27%), but this is far fewer than the 43% who said this in 2013.

Figure 55: What can acceptably be disposed of down the toilet, sink or drain?



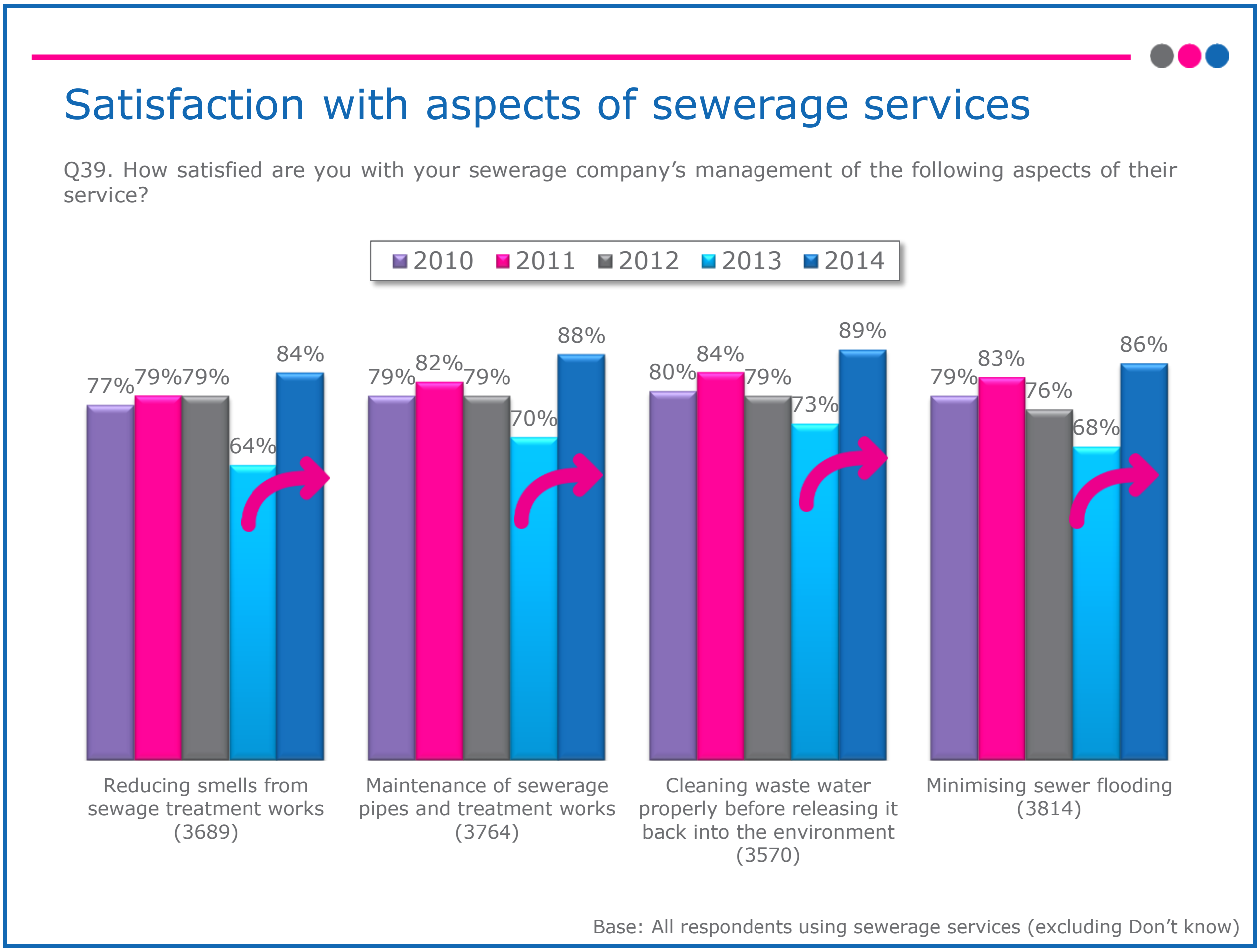
5.1.3 Similar to previous years, knowledge about what should and shouldn't be disposed of into the sewerage system increases with age (rising from 46% of the 18-29s saying "none of these" to 78% of the over 75s). Rural customers are more likely to be correct (69% saying none of these compared to 61% of urban and 62% of suburban dwellers). There are very few other differences by customer group.

5.2 Satisfaction with sewerage services

5.2.1 Around a quarter of customers were unable to give a view on the specific aspects of the sewerage service shown in Figure 56, an even higher proportion than in 2013. This could be because they have not experienced any problems themselves or that sewerage services are less visible to them and they do not feel that they know enough about them to be able to comment on issues such as cleaning waste water properly before releasing back into the environment (31% answered don't know to the latter).

5.2.2 Amongst those who did answer, there is a significant increase in satisfaction for each aspect of service, to well over 80% (from around 70% in 2013).

Figure 56: Satisfaction with aspects of sewerage services



5.2.3 There is no significant difference between customers in England and Wales in satisfaction with the various elements that make up the sewerage service, although Welsh customers give the same or slightly higher ratings for all of them.

5.2.4 Although there are some differences in satisfaction with sewerage services, levels are high across all regions. Satisfaction ratings in the Northumbria region are over 90% for each element of the sewerage service, whereas ratings from customers in the Thames and Southern regions are a bit lower in the 80% - 90% range.

Figure 57: Satisfaction with aspects of sewerage services by region

Satisfaction with aspects of sewerage services

Q39. How satisfied are you with your sewerage company's management of the following aspects of their service?

Statement	Eastern	Wales	North-umbria	Mid-lands	South West	South-ern	Thames	North West	Wessex	York-shire
Reducing smells from sewage treatment works	82%	84%	90%	87%	78%	83%	80%	86%	86%	84%
Maintenance of sewerage pipes & treatment works	87%	89%	91%	88%	85%	88%	84%	91%	92%	86%
Cleaning waste water properly before releasing it back into the environment	90%	91%	92%	91%	88%	86%	84%	94%	90%	89%
Minimising sewer flooding	88%	88%	92%	86%	80%	84%	82%	91%	87%	82%

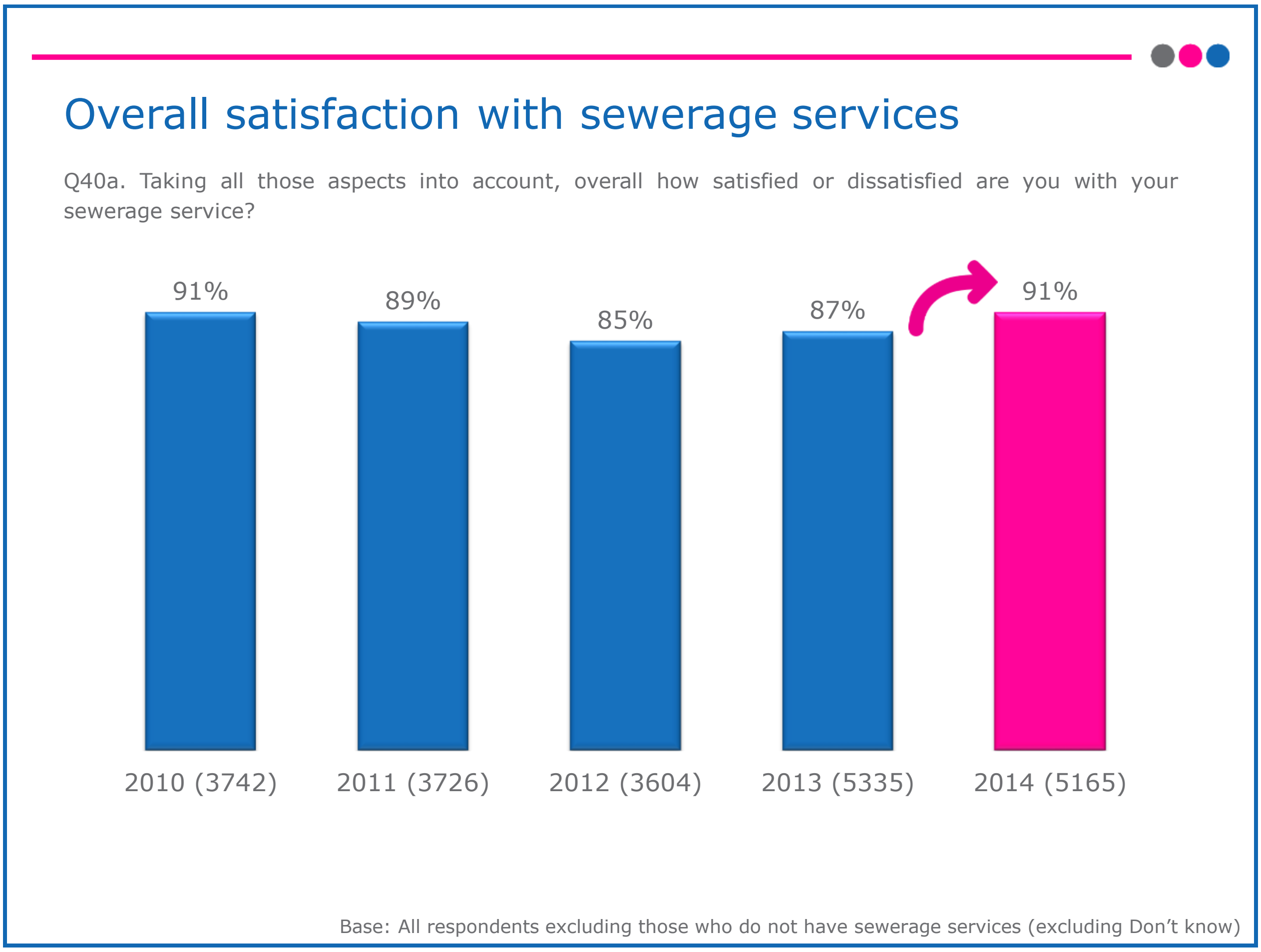
Highest satisfaction level

Lowest satisfaction level

Base sizes different for each attribute
Base: All respondents using sewerage services (excluding Don't know)

5.2.5 Having looked at the four elements of sewerage services, customers were asked for their overall satisfaction rating. The increase in satisfaction for the individual elements underpins a significant increase in overall satisfaction to 91% (from 87% in 2013), which is back to a level last seen in 2010.

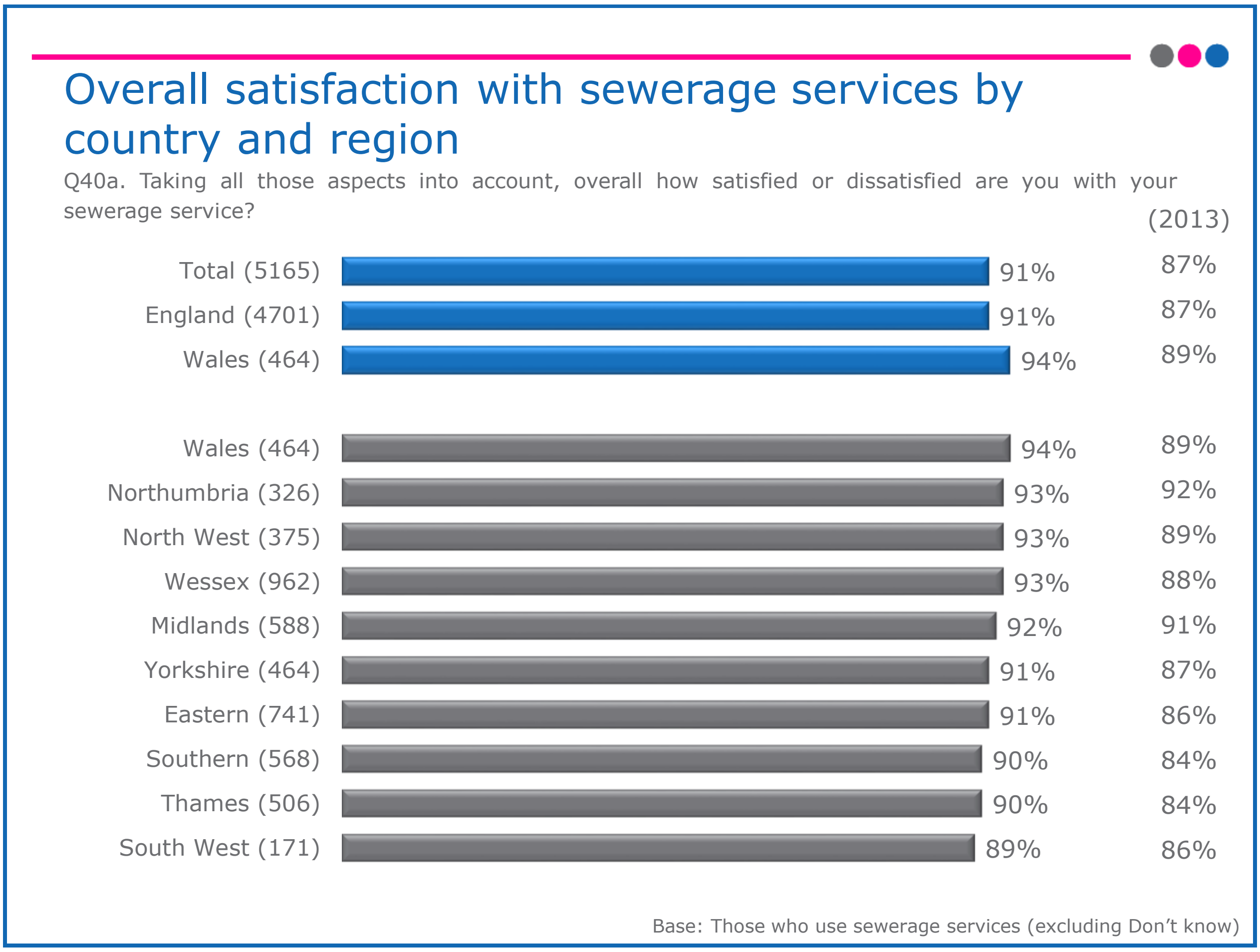
Figure 58: Overall satisfaction with sewerage services



5.2.6 Overall satisfaction with sewerage services is significantly higher in Wales than in England (94% compared to 91%).

5.2.7 There are no significant regional differences. However, the regions where there are higher levels of satisfaction for individual elements of service (such as Northumbria) tend to be rated slightly higher in terms of overall satisfaction than those which received lower ratings (such as Thames).

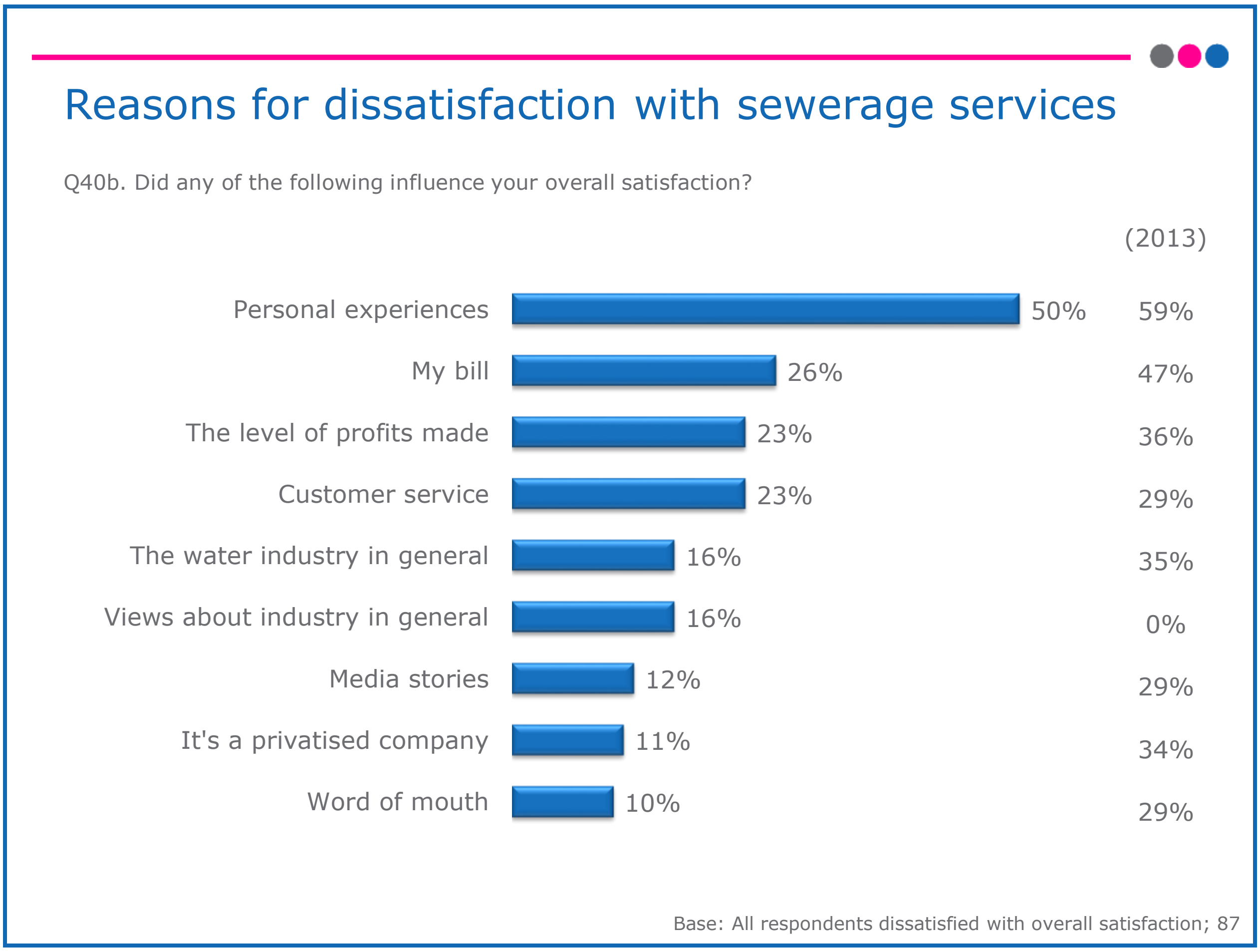
Figure 59: Overall satisfaction with sewerage services



5.2.8 As we have seen throughout the survey, older customers are more satisfied than younger ones and this is true for satisfaction with sewerage services (97% of over 75s compared with 87% of 18-29s).

5.2.9 The small number of dissatisfied customers (n=87) were asked whether any of the reasons in Figure 60 influenced their overall satisfaction. Personal experience (50%) features more prominently than any negative perceptions of the water industry or dissatisfaction with bills, as was the case in 2013.

Figure 60: Reasons for dissatisfaction with sewerage services



5.2.10 The small proportion of customers (7% i.e. 380) who were satisfied with their sewerage service but dissatisfied with value for money were asked why. The main reasons given were the same as for water services, i.e. prices have risen (67%), that the price is unfair (22%) and that the charging system is unfair (14%).

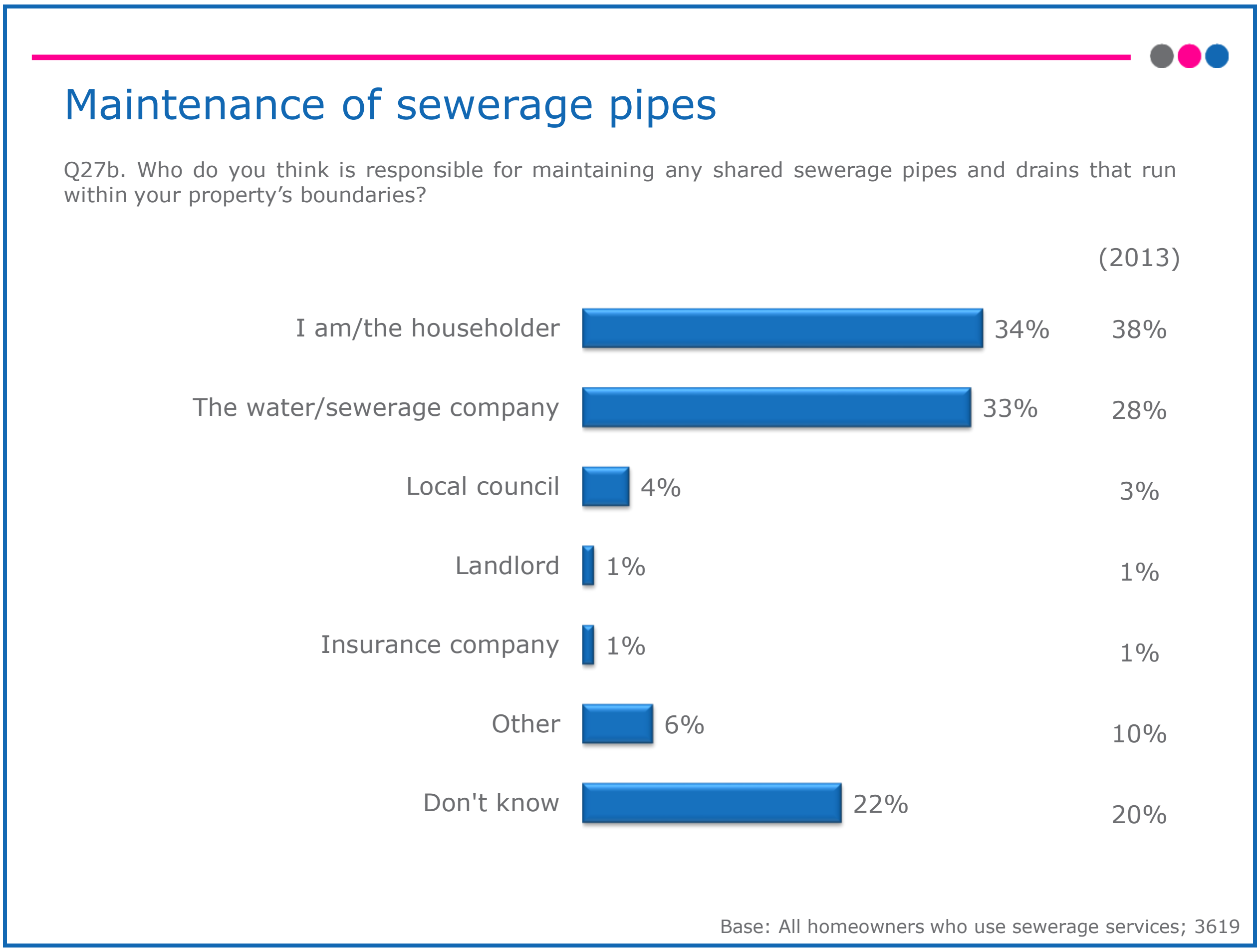
5.3 Responsibility for sewerage pipes

5.3.1 Amongst homeowners, there is much more confusion about responsibility for maintaining shared sewerage pipes than there is for water pipes. Despite a significant increase in those saying correctly that the sewerage company is responsible (from 28% in 2013 to 33% in 2014), this still leaves two-thirds of homeowners either assuming incorrectly or not knowing who is responsible.

5.3.2 Homeowners in Wales are more likely than those in England to identify their sewerage company as being responsible for shared sewerage pipes (38% compared to 33% of homeowners in England).

5.3.3 Homeowners in the South West and Eastern region (27% each) are less likely to be aware of this than those in Wales, Midlands and Yorkshire (all 38%).

Figure 61: Maintenance of sewerage pipes



6. Comparisons with other utilities

This chapter compares customer views on water and sewerage service providers with other household service providers in terms of caring about the customer service they provide, trust and overall satisfaction with service. It also reports on a Net Promoter Score, a new measure introduced in 2014.

Key trends

- Water and sewerage service providers continue to be seen as more caring and trustworthy than energy suppliers.
- Whilst satisfaction with water suppliers (but not sewerage service providers) is still higher than for other utilities, the gap has narrowed considerably.

Key changes since 2013

- There has been a significant increase for water and sewerage service providers and energy companies on all three measures (satisfaction, care and trust), as well as a significant increase in satisfaction with telephone landline providers.

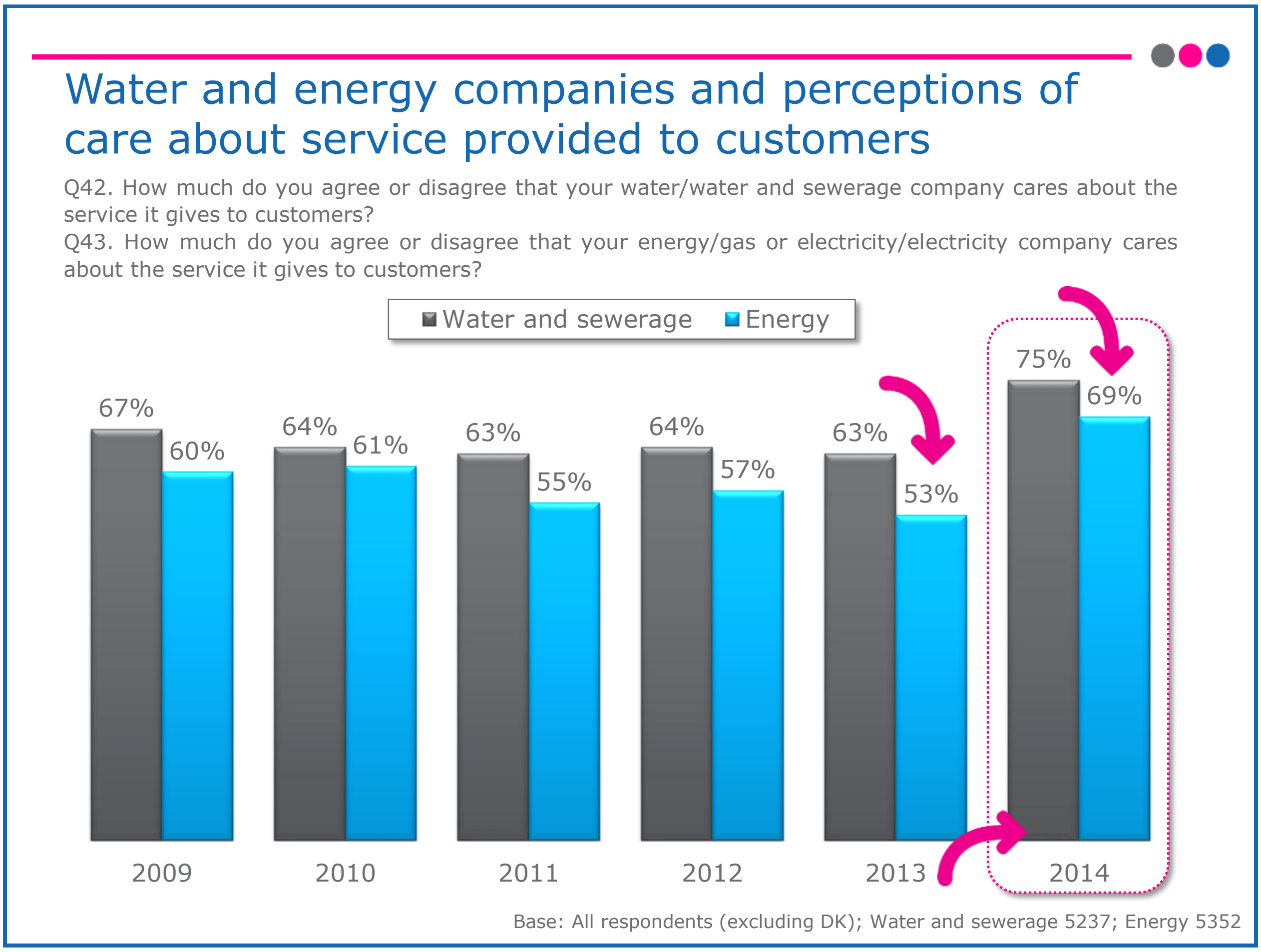
New questions/analysis

- The introduction of a Net Promoter Score (NPS) question about recommending their provider allows water customers to be classified into promoters (45%), passives (33%) and detractors (22%), with a resulting NPS score of +23 for the industry.

6.1 Companies caring about the service they provide

6.1.1 Water companies (75%) continue to be seen as more caring than energy companies (69%). Scores for both energy, and water companies have increased significantly since 2013.

Figure 62: Water and energy companies and perceptions of care about service provided to customers

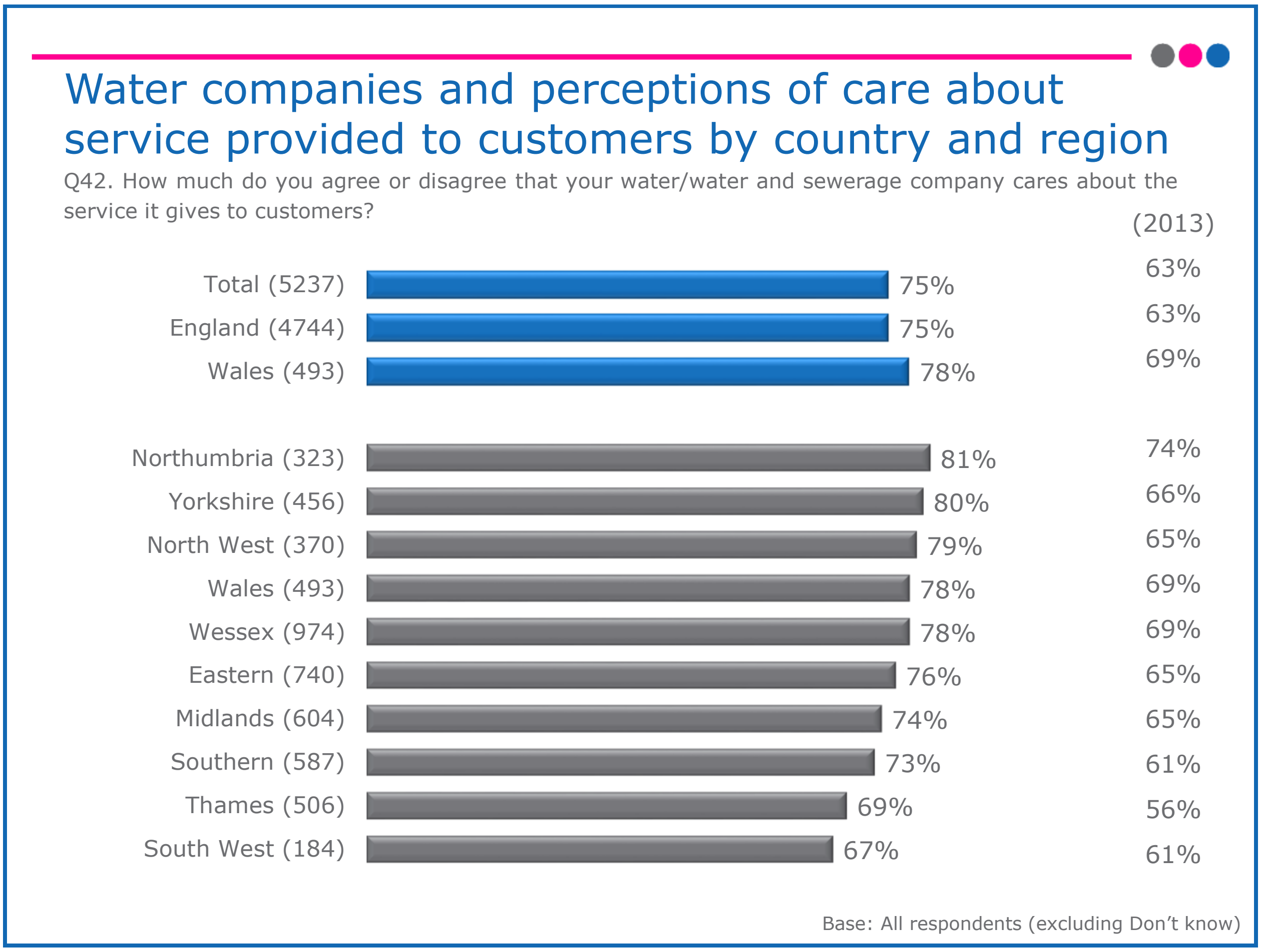


6.1.2 There is no significant difference in perceptions of care between customers in England and in Wales.

6.1.3 However, there are regional differences, with customers in the South West and Thames regions (67% and 69%) much less likely to think their water company cares about service than those in other regions, particularly Northumbria (81%).

6.1.4 In line with the overall increase since last year, perceptions of care have improved in England and in Wales, and all regions (the South West increase being the only one which is not significant).

Figure 63: Water companies and perceptions of care about service provided to customers by country and region



6.1.5 The customer groups more likely to agree that their water and sewerage service providers are caring are:

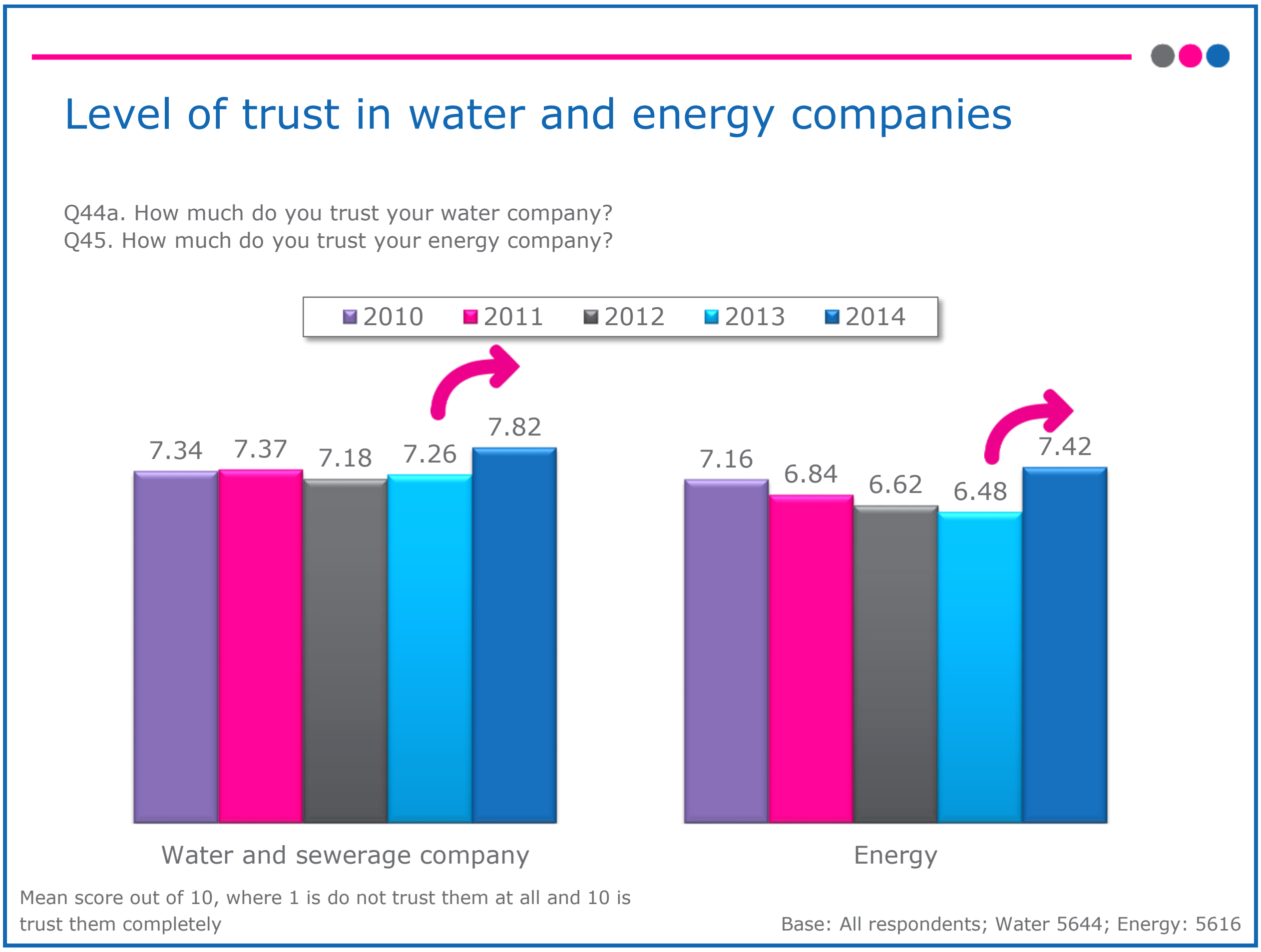
- Older people (86% of over 75s compared to 69% of the under 30s)
- Private/council renters (77% compared to 71% of housing association tenants).

These groups also feel the same way about their energy supplier but the differences are not always as marked.

6.2 Trust in water and sewerage companies compared to energy companies

6.2.1 Customers were asked how much they trusted their water company and their energy company on a scale of 1 to 10, where 1 means "not at all" and 10 means "trust them completely". Scores for both water companies and energy companies have risen significantly since 2013, although water companies are still significantly ahead of energy companies when it comes to trust (7.82 out of 10 compared to 7.42).

Figure 64: Level of trust in water and energy companies

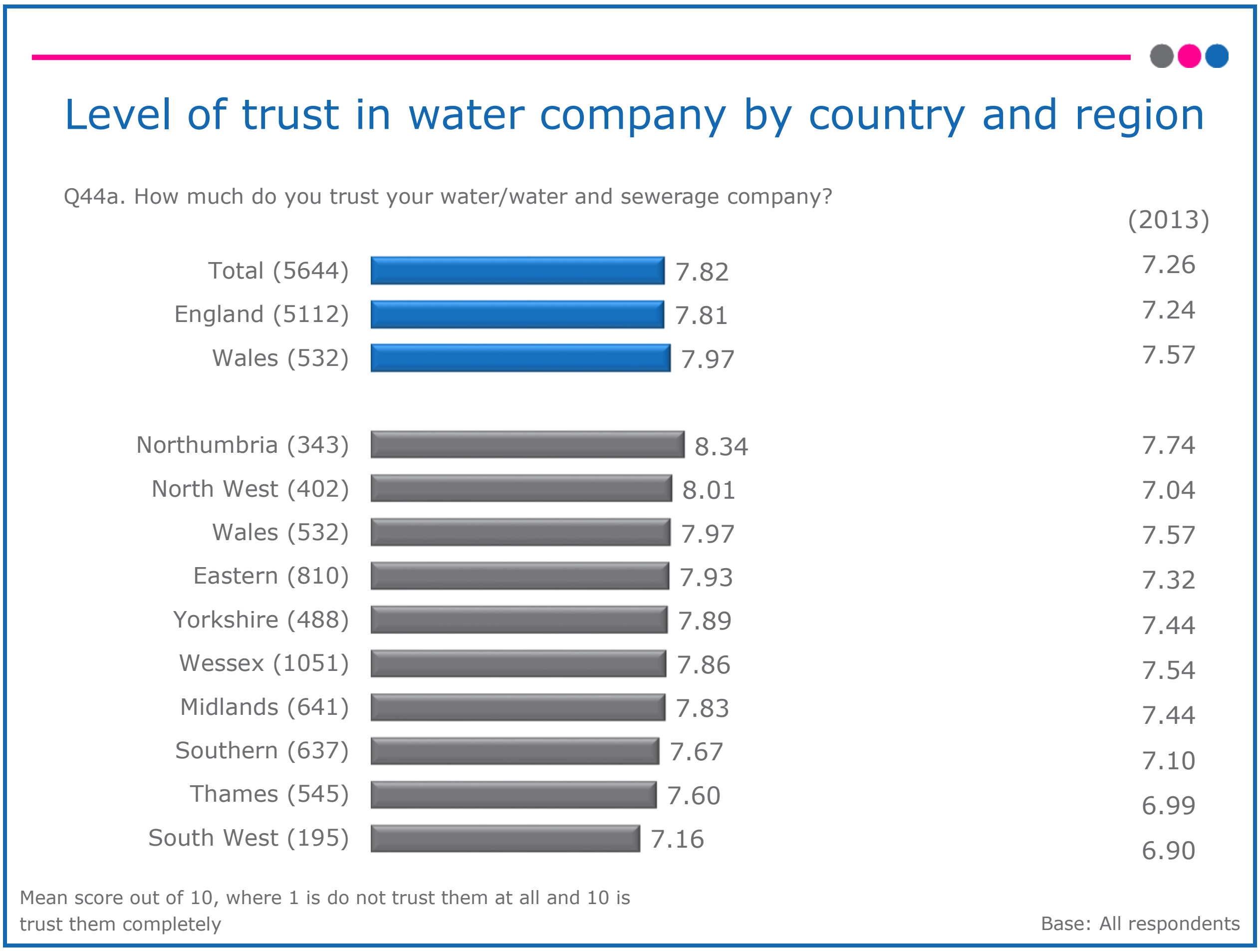


6.2.2 Levels of trust are very similar in England and in Wales.

6.2.3 Customers in Northumbria region have the highest levels of trust (8.34) and the highest perceptions of company care. Customers in the South West have the lowest levels of trust (7.16) and perceptions of care. Trust has increased across all regions.

6.2.4 Those in older age groups (60+) are more likely to trust their water and sewerage supplier, similar to the results already seen on how much the supplier cares.

Figure 65: Level of trust in water company by country and region



6.3 Satisfaction with water and sewerage services

6.3.1 Similar to 2013, satisfaction with water services is significantly higher than for sewerage services and other household services.

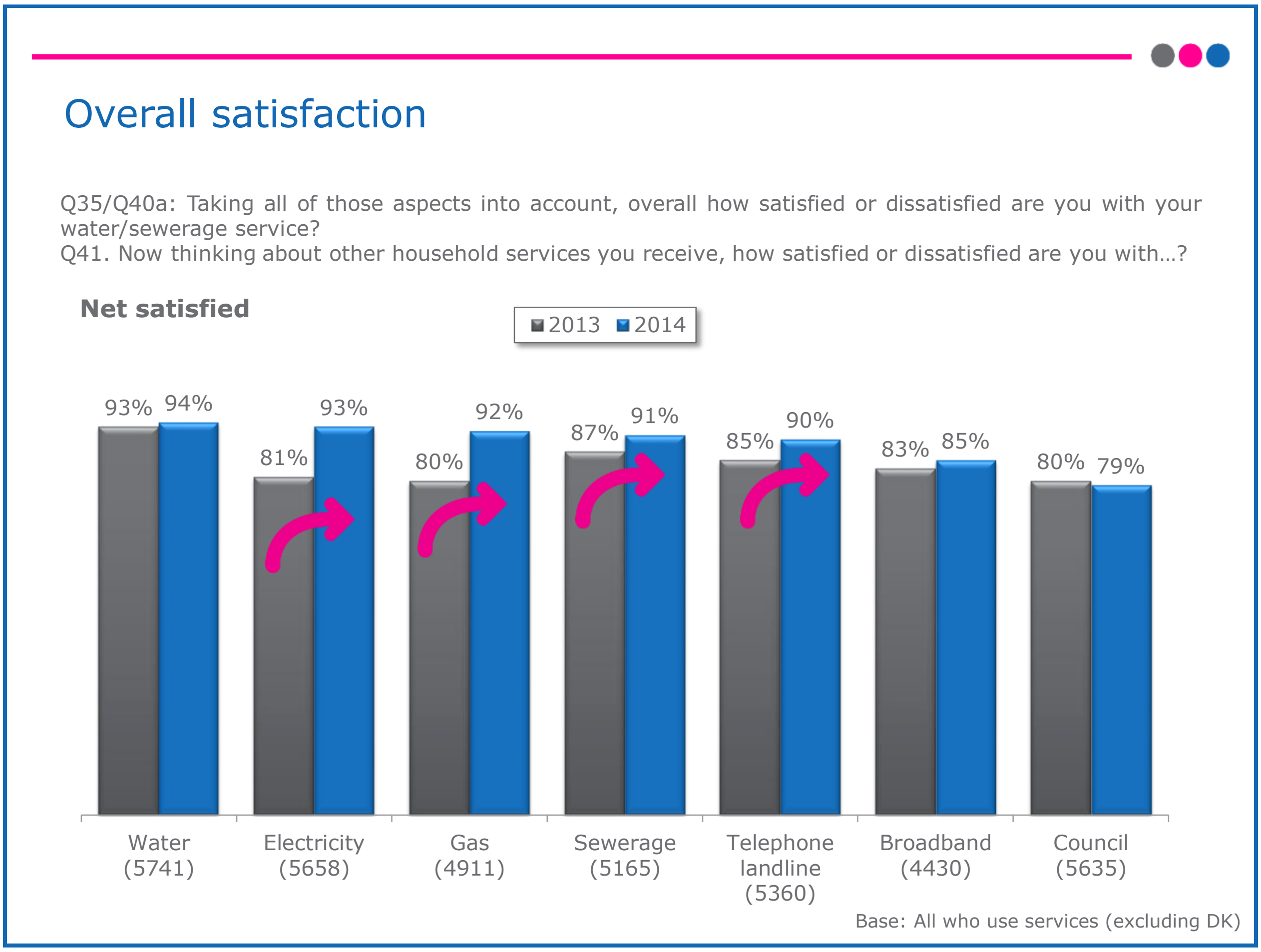
6.3.2 However, the gap with other utilities has narrowed considerably due to large increases in satisfaction scores for electricity (81% up to 93%), gas (80% up to 92%) and telephone landline (85% to 90%). Satisfaction with broadband has also increased from 83% to 85% and council services remain unchanged.

6.3.3 The findings are somewhat supported by a recent report from the UK Customer Service Institute (UKCSI)[15]. In this report, against a background of the lowest customer satisfaction scores since 2010, only two sectors showed improvements over the previous

[15] UKCSI Customer Satisfaction Index January 2015. The UKCSI score for each organisation is the average of all of its customers' satisfaction scores.

year: building societies and utilities (the latter being the most improved sector with a rise in its index score of 1.9 points).

Figure 66: Overall satisfaction with water, sewerage and other household services



6.4 Net promoter score

6.4.1 New for 2014, customers were asked to imagine that they could choose their water and sewerage supplier and, this being the case, how likely they would be to recommend their provider to friends and family on a scale of 0 to 10, where 0 means highly unlikely to recommend and 10 means extremely likely[16].

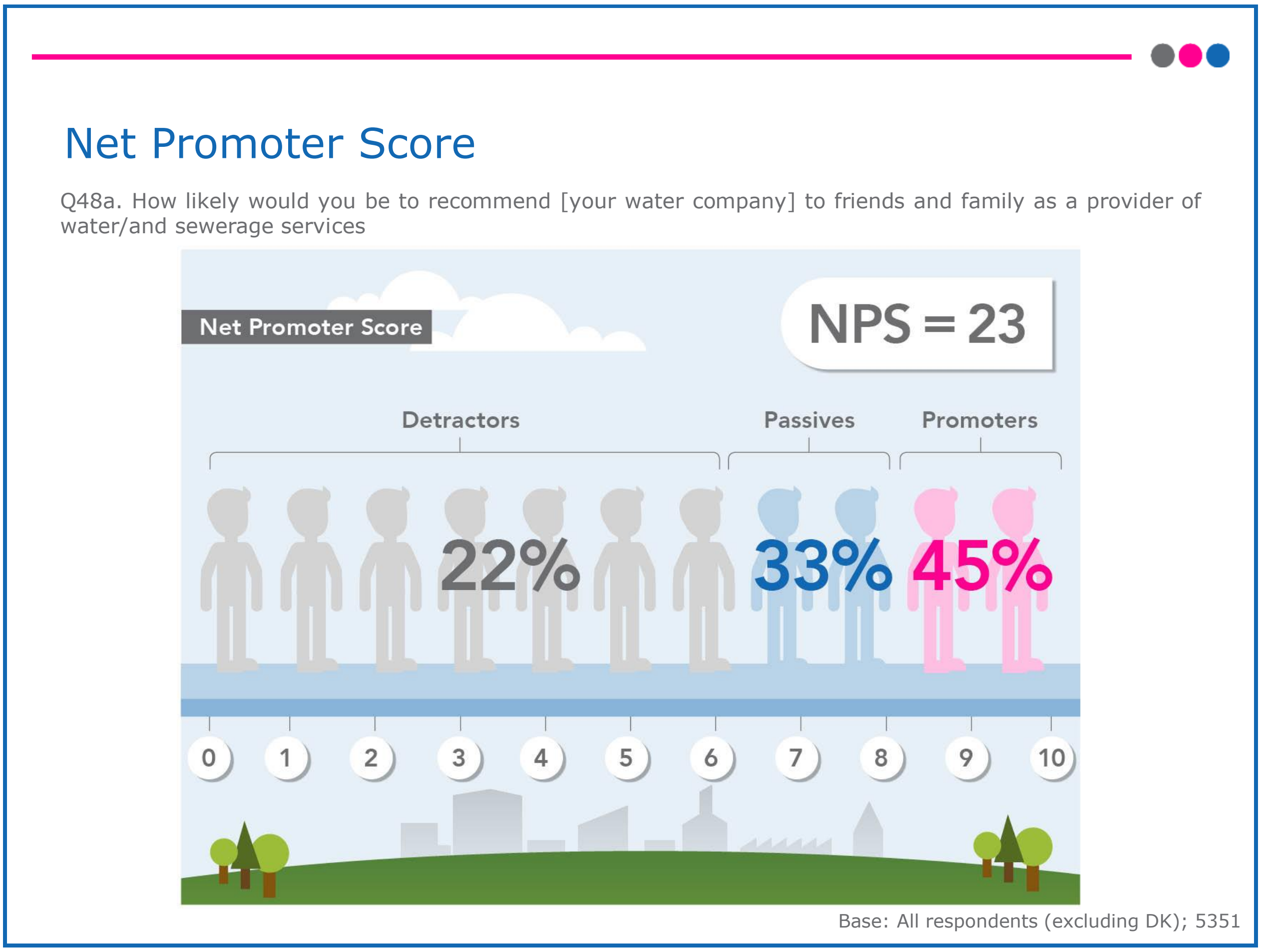
[16] This was a theoretical exercise as household customers in England and Wales can't switch their service provider

6.4.2 Those giving scores of 0 to 6 are classified as Detractors, 7-8 Passives and 9 or 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

6.4.3 The overall NPS score for water and for water and sewerage companies is +23. The higher the NPS score, the more positive customers are. A negative score is possible where there are more detractors than promoters.

6.4.4 To put this into some context, an Energy UK report shows the NPS for suppliers in the energy industry as -30. One fifth (21%) are Promoters and over half (52%) are Detractors.[17]

Figure 67: Net promoter score

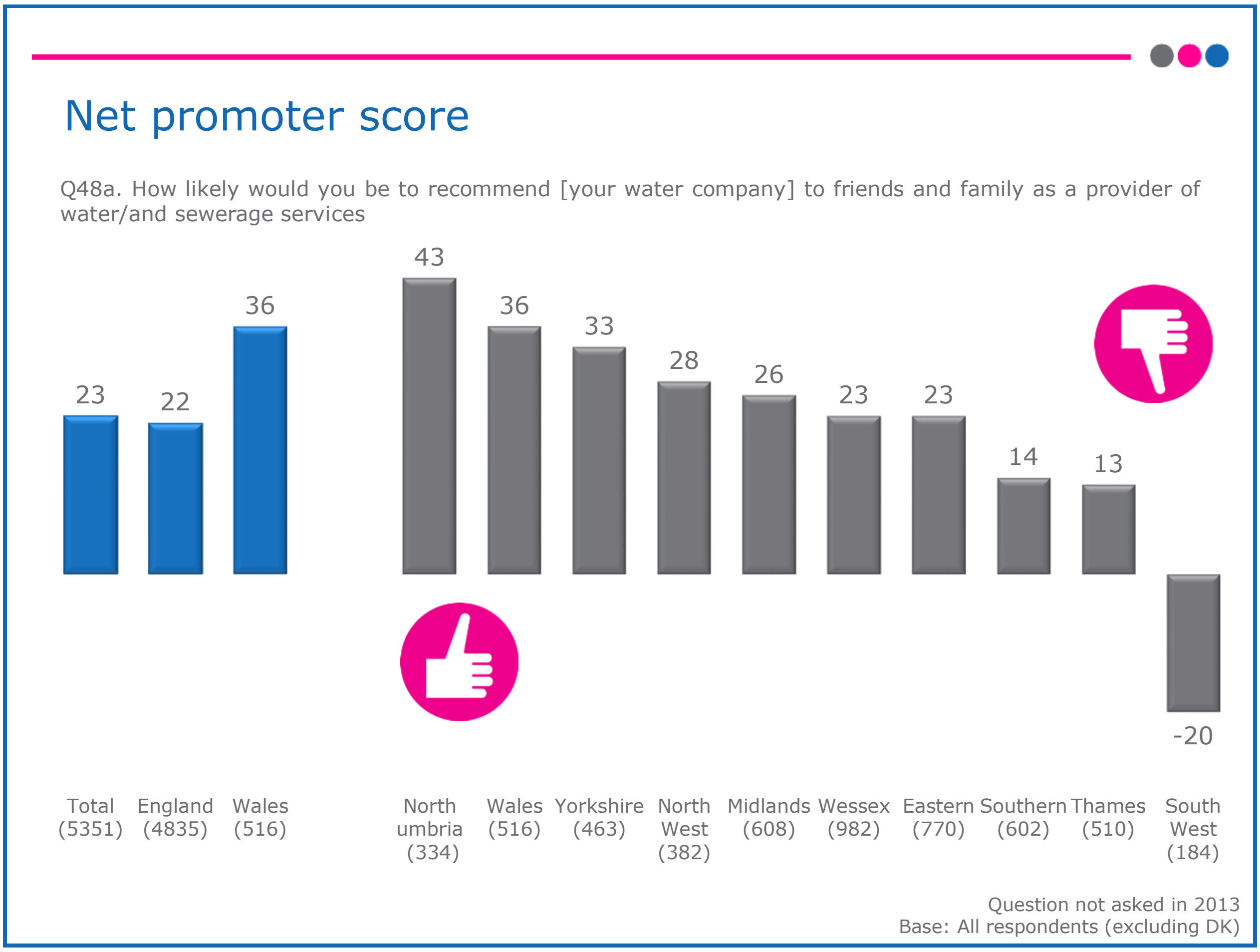


[17]Pages 30-31, https://www.ipsos-mori.com/Assets/Docs/Publications/SRI_Environment_EnergyUK_CMS_FINAL_REPORT_PUBLIC.pdf

6.4.5 When looking at NPS scores by region (see Figure 68), there is a large difference between the best and worst performing regions; Northumbria with a score of +43 and the South West with -20.

6.4.6 The NPS is higher for Wales than England (+36 compared to +22). Wales has significantly more promoters than England (52% compared to 44%) and significantly fewer detractors (16% compared to 23%).

Figure 68: Net promoter score by country and region



6.4.7 In line with the NPS scores detailed above, the proportions extremely likely to recommend their water company are significantly higher in Wales than in England (52% compared with 44%).

6.4.8 Customers in the Northumbria region are most likely to recommend their water company, whereas those in the South West are least likely.

Figure 69: Likelihood to recommend water company by country and region

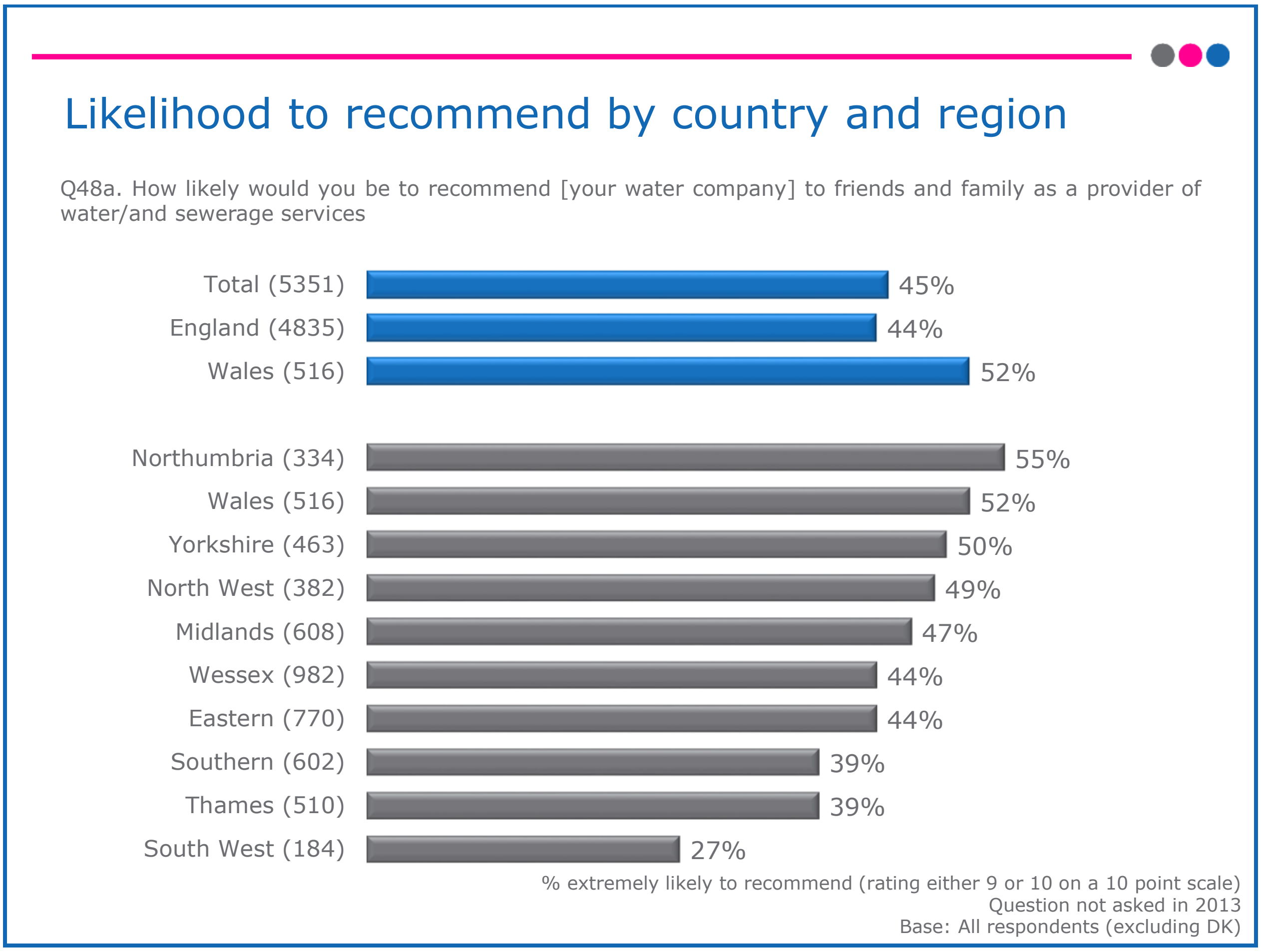
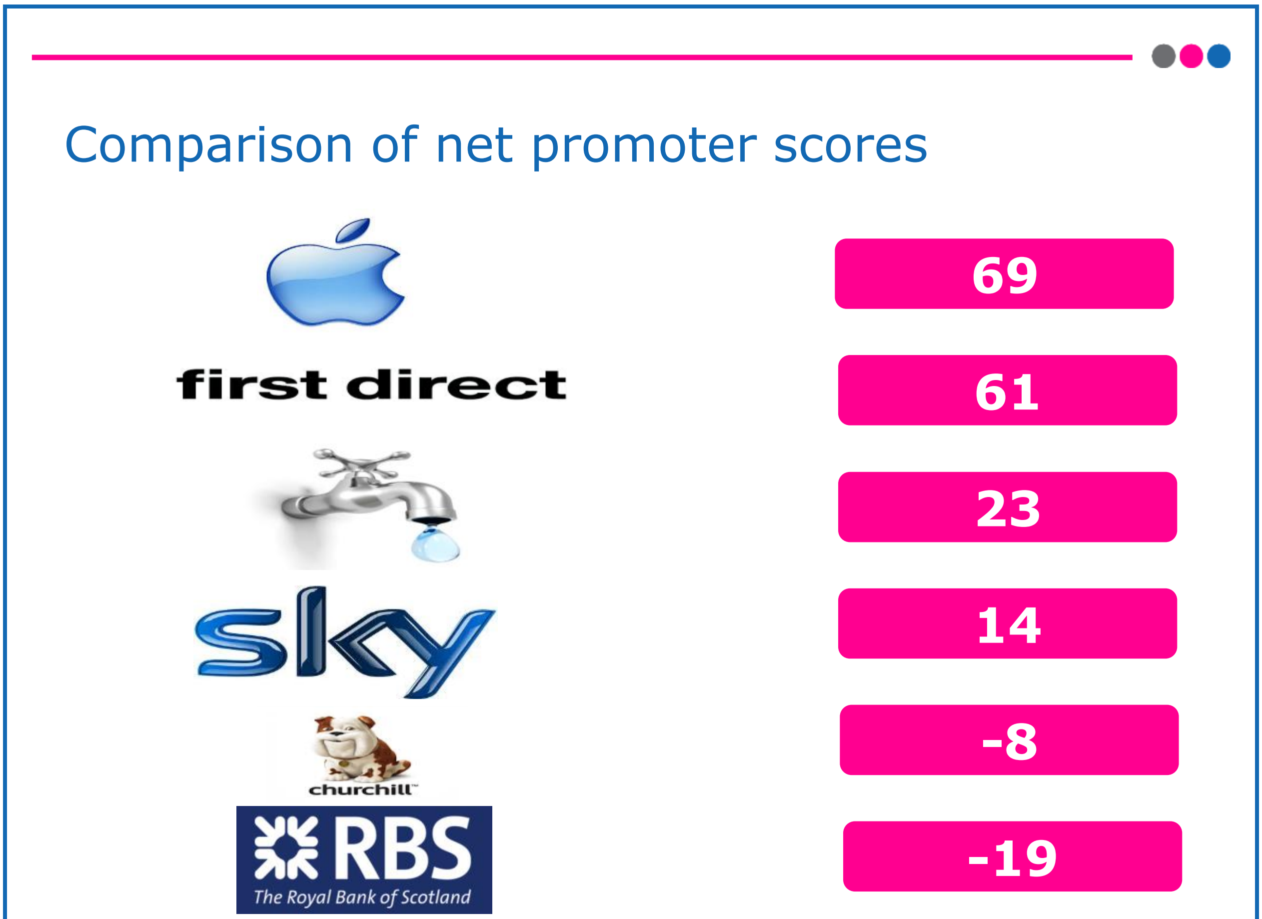


Figure 70: Comparison of water NPS with scores in other sectors[18]



Source: Satmetrix 2015

[18] http://www.satmetrix.com/in-the-news/customer-loyalty-revealed-by-uk-satmetrix-net-promoter-benchmarks-report/

7. Speaking up for water customers

This chapter looks at awareness and knowledge of CCWater, how people would go about contacting the organisation and the importance to customers of having a body to represent their interests. It also covers two new topics for 2104: views on the charges levied on customers to pay for CCWater and awareness of the 2014 price review.

Key trends

- Although customers continue to know little about CCWater, most (73%) believe in the importance of having a body to protect their interests.
- Less than one in ten customers (7%) think it's not very or not all important and this has remained unchanged since 2013.
- As in 2013, most would look for CCWater's details using a search engine; paper sources are declining in importance.

Key changes since 2013

- There is an increase in the proportion of customers who believe it is absolutely essential or very important to have representation from 70% in 2013 to 73% in 2014. The proportion saying it is not very or not at all important has remained static since 2013 at 7%.

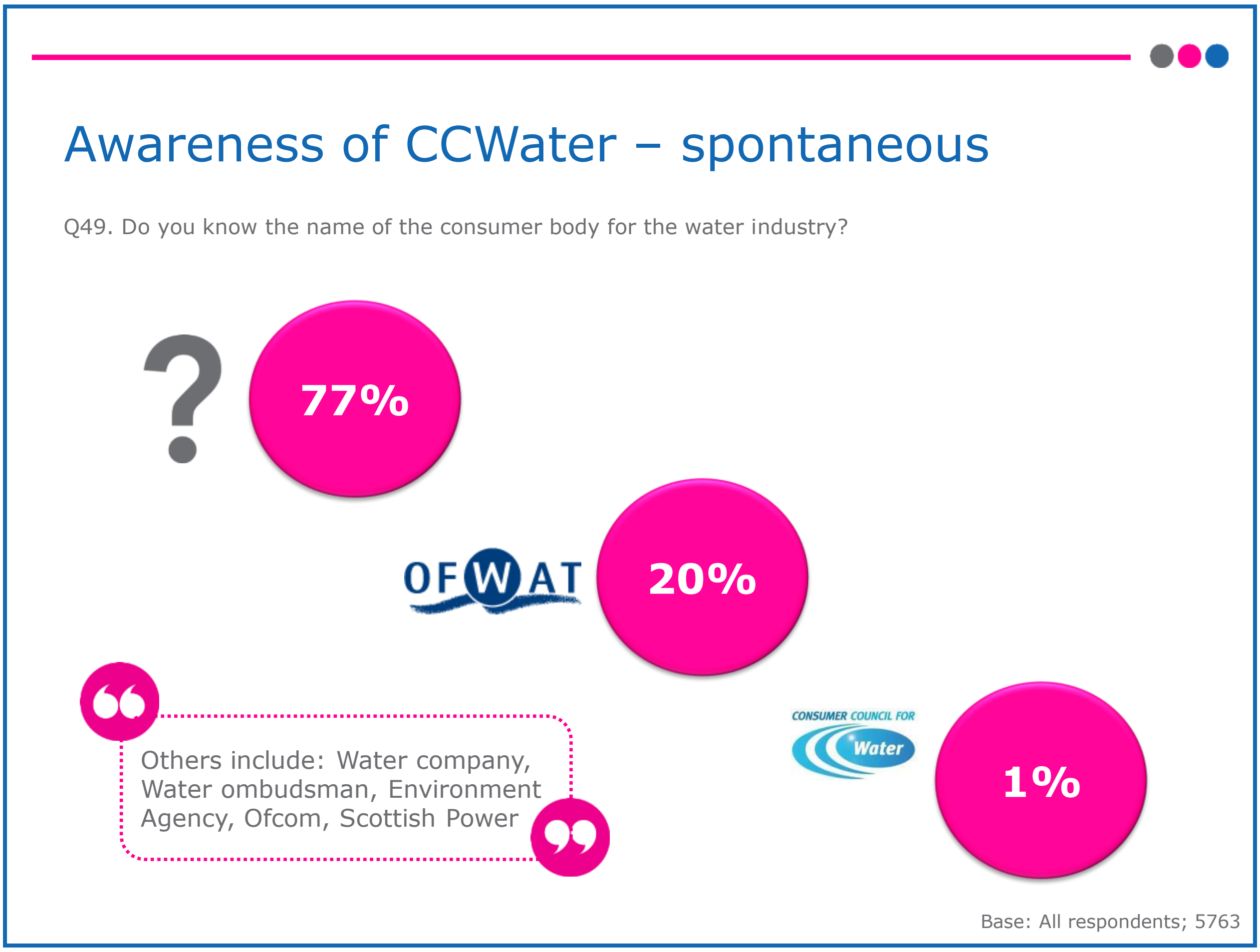
New questions

- The vast majority (88%) feel that the 21 pence added to their water bills for CCWater's services is good value for money.
- Around a quarter (23%) were aware of the 2014 price review, rising to a third (32%) during the week of the announcement in December 2014.

7.1 Awareness of CCWater

7.1.1 Consistent with previous years, very few people are aware of CCWater. When asked the name of the consumer body for the water industry far more people say Ofwat (20%) than CCWater (1%). Although spontaneous awareness is extremely low, it is significantly higher than when this question was last asked in 2010, when only 4 respondents out of a sample size of 2012 knew the name without being prompted.

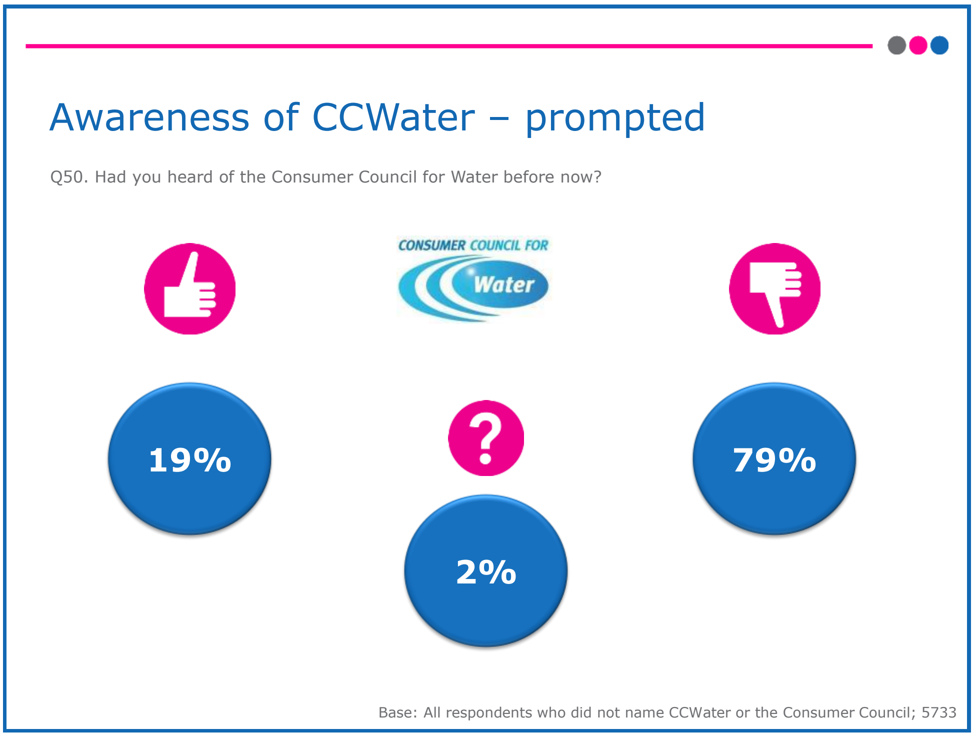
Figure 71: Spontaneous awareness of CCWater



7.1.2 However, when prompted with the name almost a fifth (19%) say they have heard of the Consumer Council for Water. A significant increase from 2010 when 14% said they were aware when prompted.

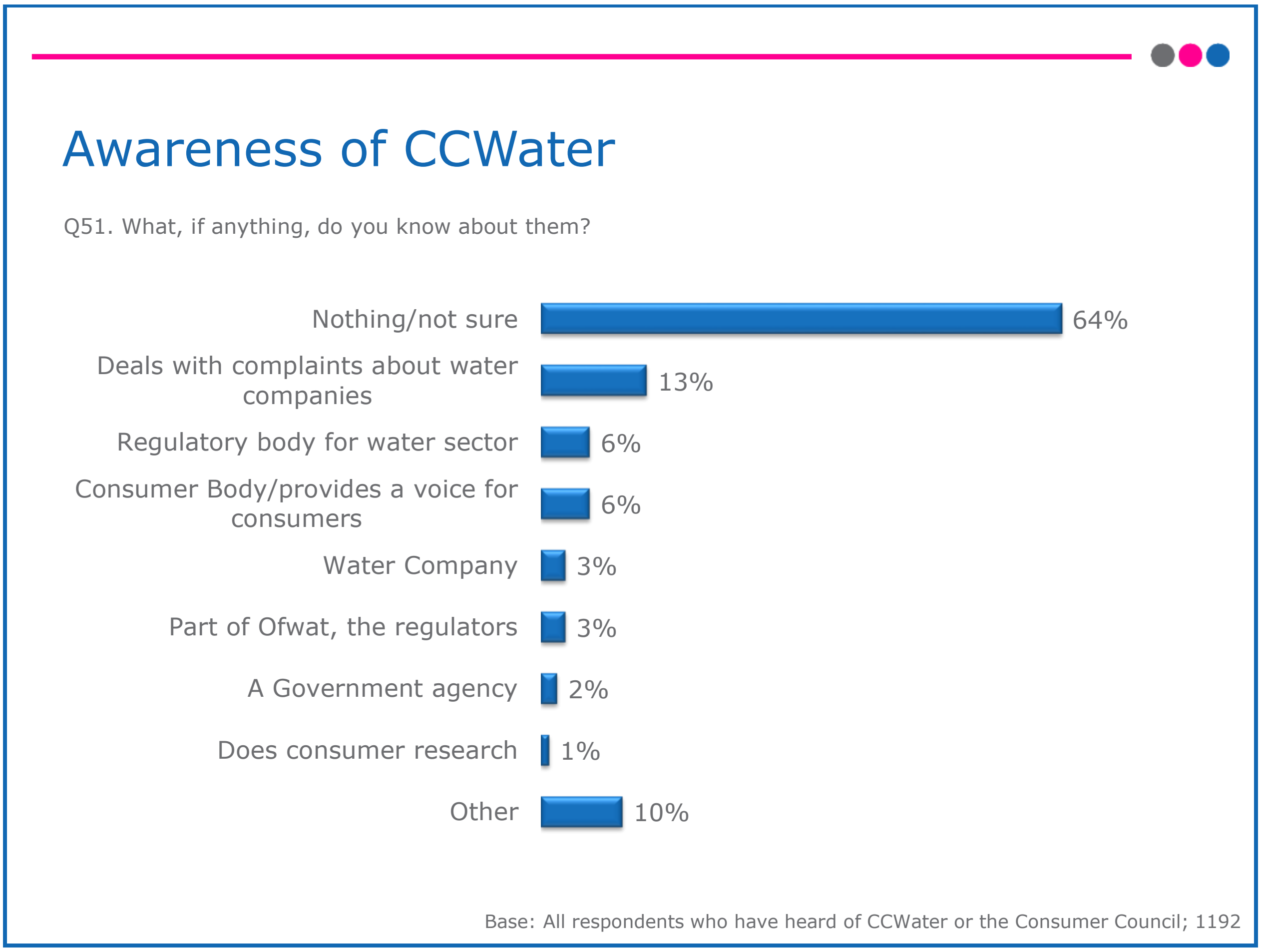
7.1.3 Awareness levels are the same in England and in Wales. Regionally, awareness is particularly high in the South West (26%) and Wessex (24%).

Figure 72: Prompted awareness of CCWater



7.1.4 The majority of those who have heard of CCWater do not really know anything about what it does (64%). However, around a fifth are correct in saying that it deals with complaints about water companies (13%) and it provides a voice for consumers (6%). It's difficult to say whether they know this as a fact or whether the prompt causes them to make an educated guess.

Figure 73: Knowledge of CCWater

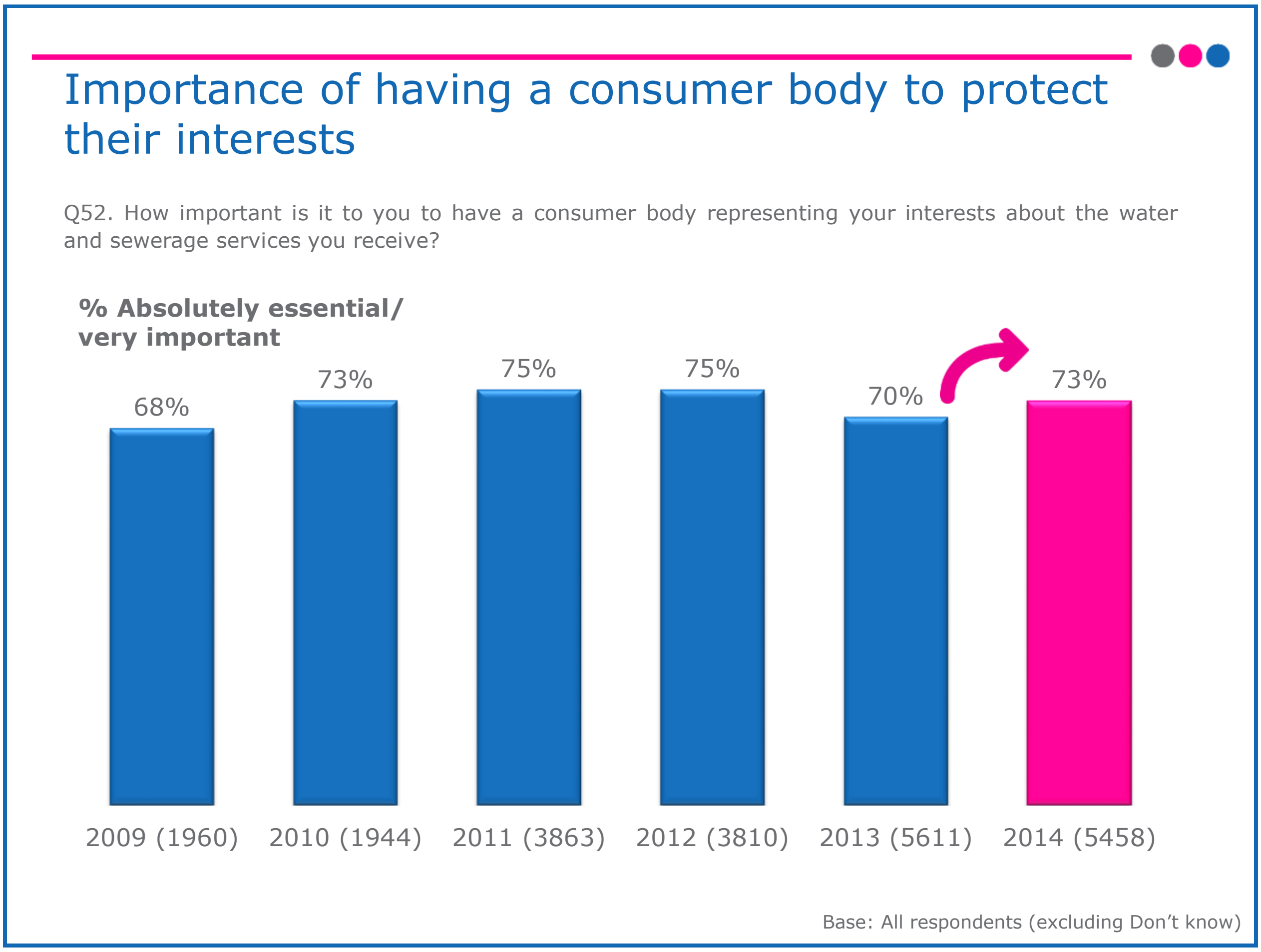


7.2 Importance of CCWater

7.2.1 Customers still feel it is important to have a consumer body to protect their interests (93% saying it is important to some degree; the same as in 2013). However, the proportion saying it is "absolutely essential" or "very important" has risen from 70% to 73% in 2014, which reverses the dip seen in 2013.

7.2.2 This increase has impacted the customers in the middle of the scale saying it is fairly important to have a consumer body to protect their interests (20% in 2014 compared with 22% in 2013) rather than those who say it is not very or not at all important (remained static since 2013 at 7%).

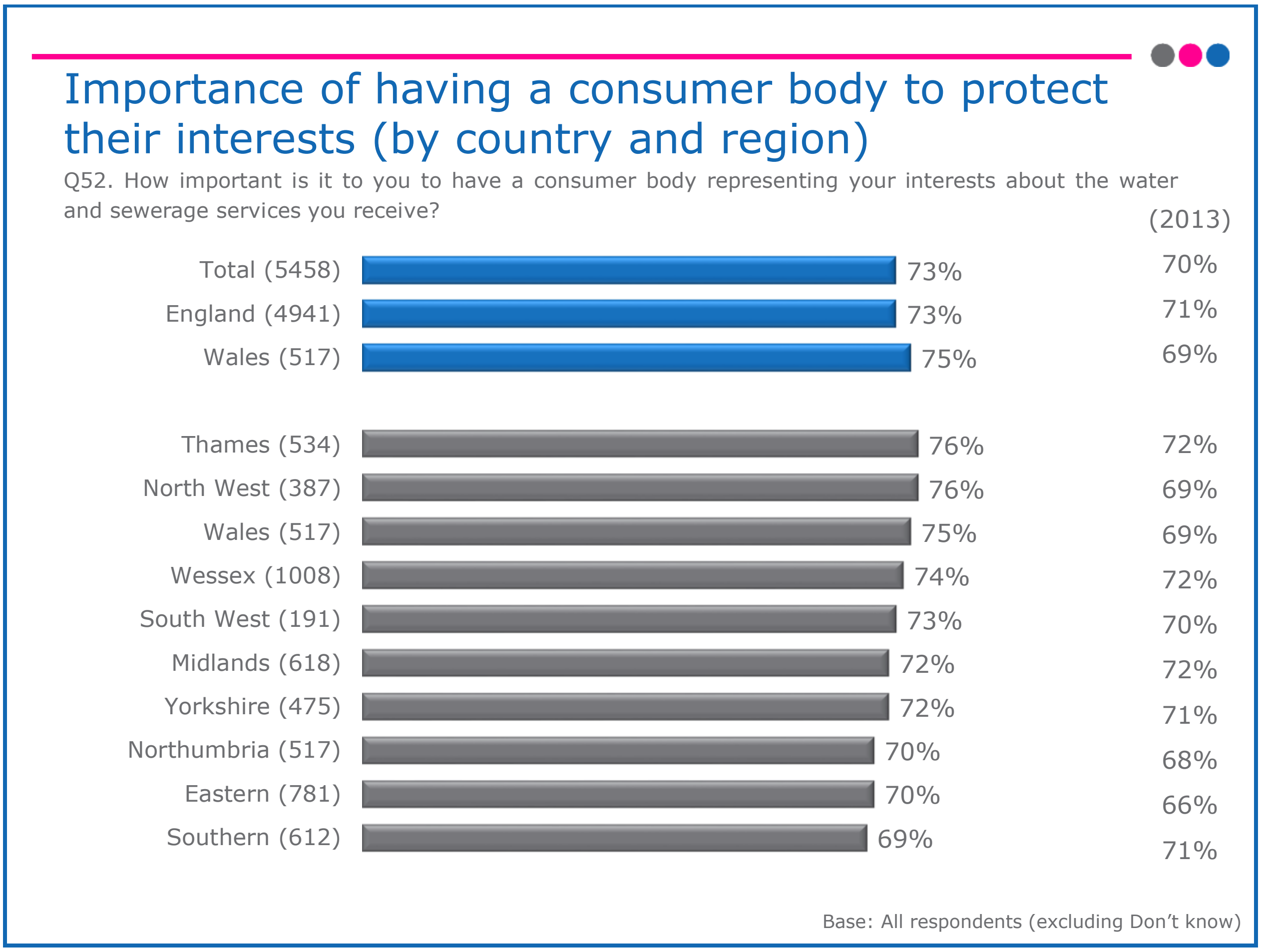
Figure 74: Importance of having a consumer body to protect their interests



7.2.3 Customers in England and in Wales hold similar views on the importance of having a consumer body to protect their interests. There has been a significant increase in importance in both countries since 2013 (Figure 75).

7.2.4 Support for representation is fairly similar across the regions.

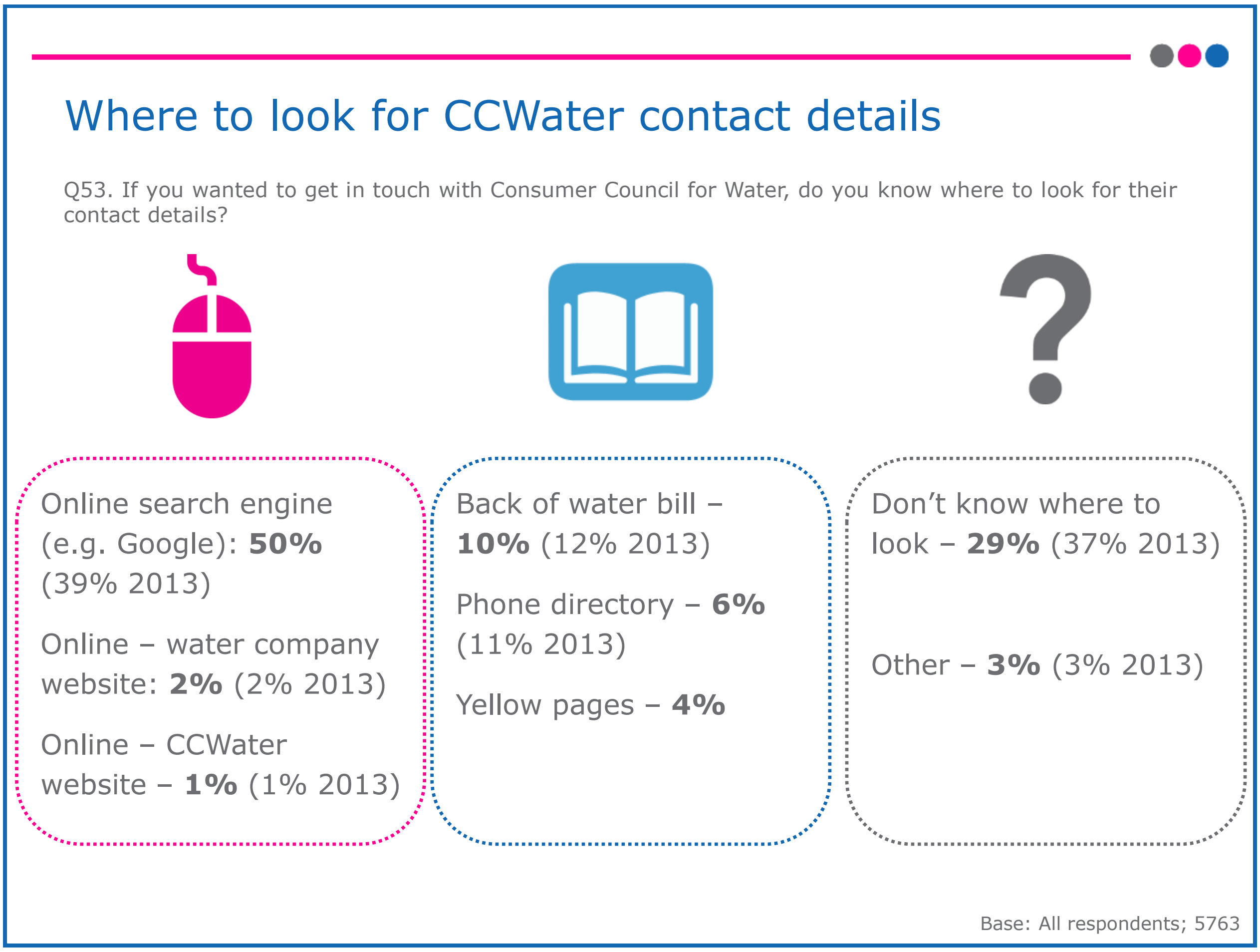
Figure 75: Importance of having a consumer body to protect their interests by country and region



7.2.5 As in 2013, older customers are more concerned about having someone to protect their interests than younger people (76% of the over 60s compared to 62% of 18-29s).

7.2.6 Over two-thirds (68%) would know where to look for CCWater's contact details, which is an improvement on 2013 (63%). The internet continues to be the main port of call, primarily a search engine such as Google (50%). Paper sources, such as the back of a bill and telephone directories, are being used less.

Figure 76: Where to look for CCWater contact details



7.2.7 Two customer groups in particular would struggle if they wanted to contact CCWater:

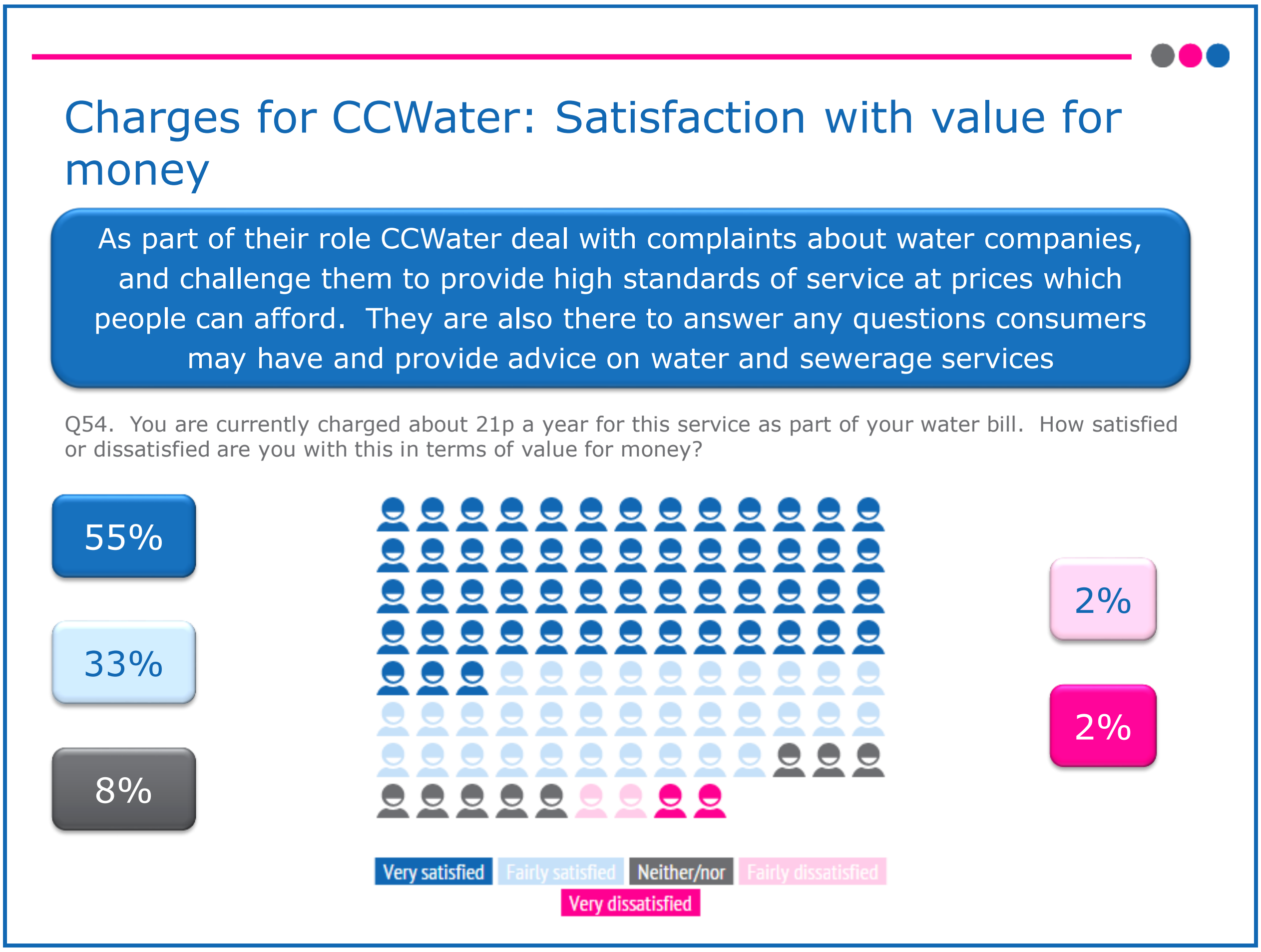
- The over 75s (47% would not know where to look for details). This could be linked to the fact that only 43% of customers we spoke to had access to the internet.
- The Dissatisfied customer cluster (36% would not know where to look).

7.3 Value for money of CCWater

7.3.1 For the first time customers were given information about CCWater's role (see Figure 77) and told that about 21 pence per year is added to their water bill for the service provided. They were asked how satisfied they are with this amount in terms of value for money.

7.3.2 Almost 9 in 10 customers (88%) agree that the service is good value for money and over half (55%) are very satisfied.

Figure 77: Satisfaction with charges for CCWater



7.3.3 There is no difference of opinion between customers in England and in Wales.

7.3.4 There is a correlation between overall satisfaction with water and sewerage services and satisfaction with the 21 pence charge (89% of customers satisfied with their water and 91% their sewerage supply compared to 57% and 63% of those not). In the South West, the region with the highest levels of dissatisfaction, customers are significantly less likely (79%) than customers in all other regions to feel that 21 pence a year is value for money. On the other side of the coin, the more satisfied customers in Northumbria are happiest with the CCWater charge (92%).

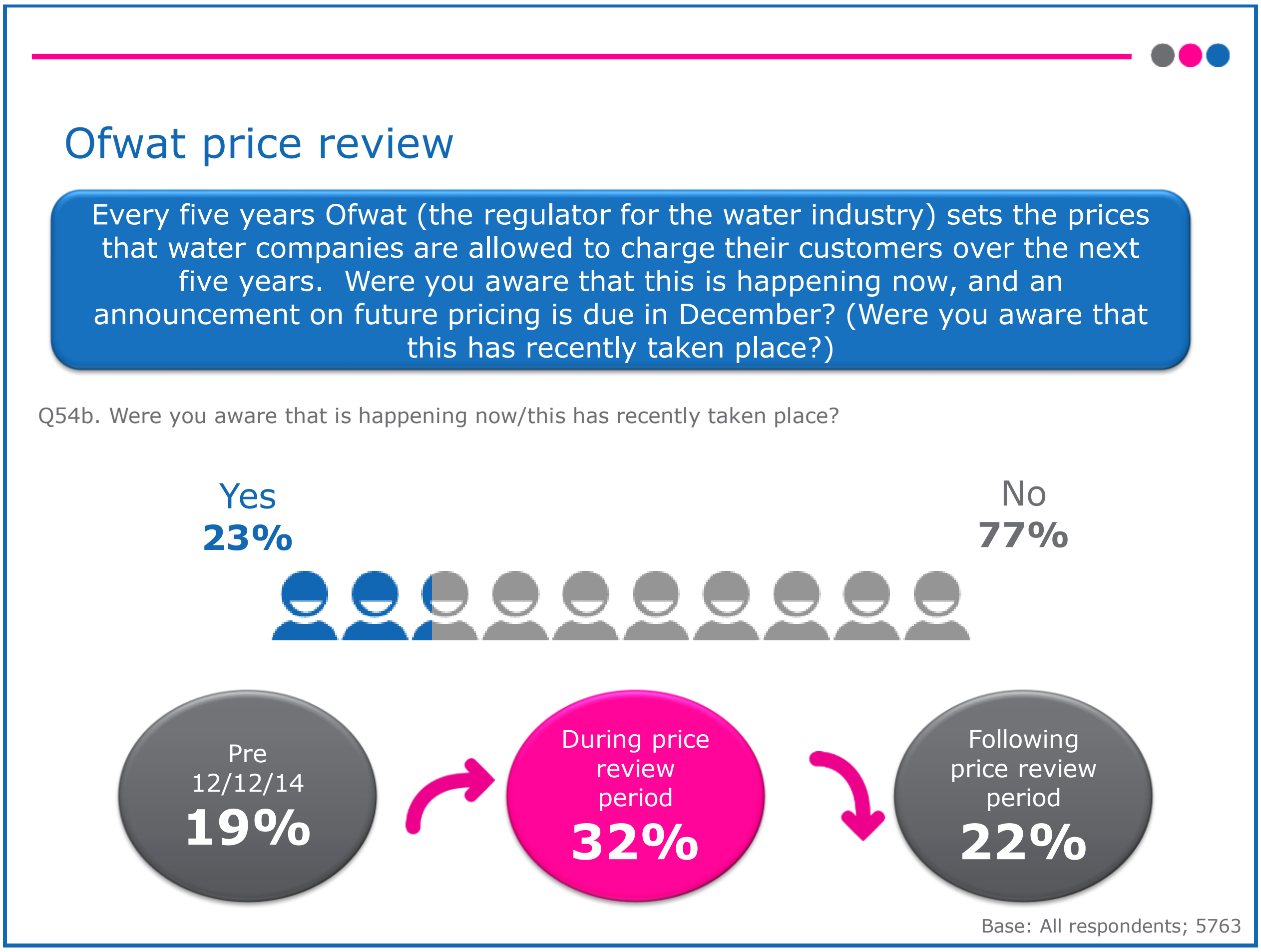
7.3.5 In addition to the above, dissatisfaction with the value for money of the charge is highest amongst those who have contacted their provider and not been satisfied with the outcome (15%).

7.3.6 There is little difference in views amongst the other customer groups.

7.4 Awareness of Ofwat price review

7.4.1 Just under a quarter of customers (23%) were aware of the Ofwat price review which takes place every five years. However, as the results of the price review were announced during the fieldwork period of the survey (in the week before Christmas) this had an effect on awareness levels. Awareness peaked at just under a third (32%) in the week of the announcement (12-19th December 2014) but afterwards almost dropped back to pre-review levels (22% post and 19% pre-publication).

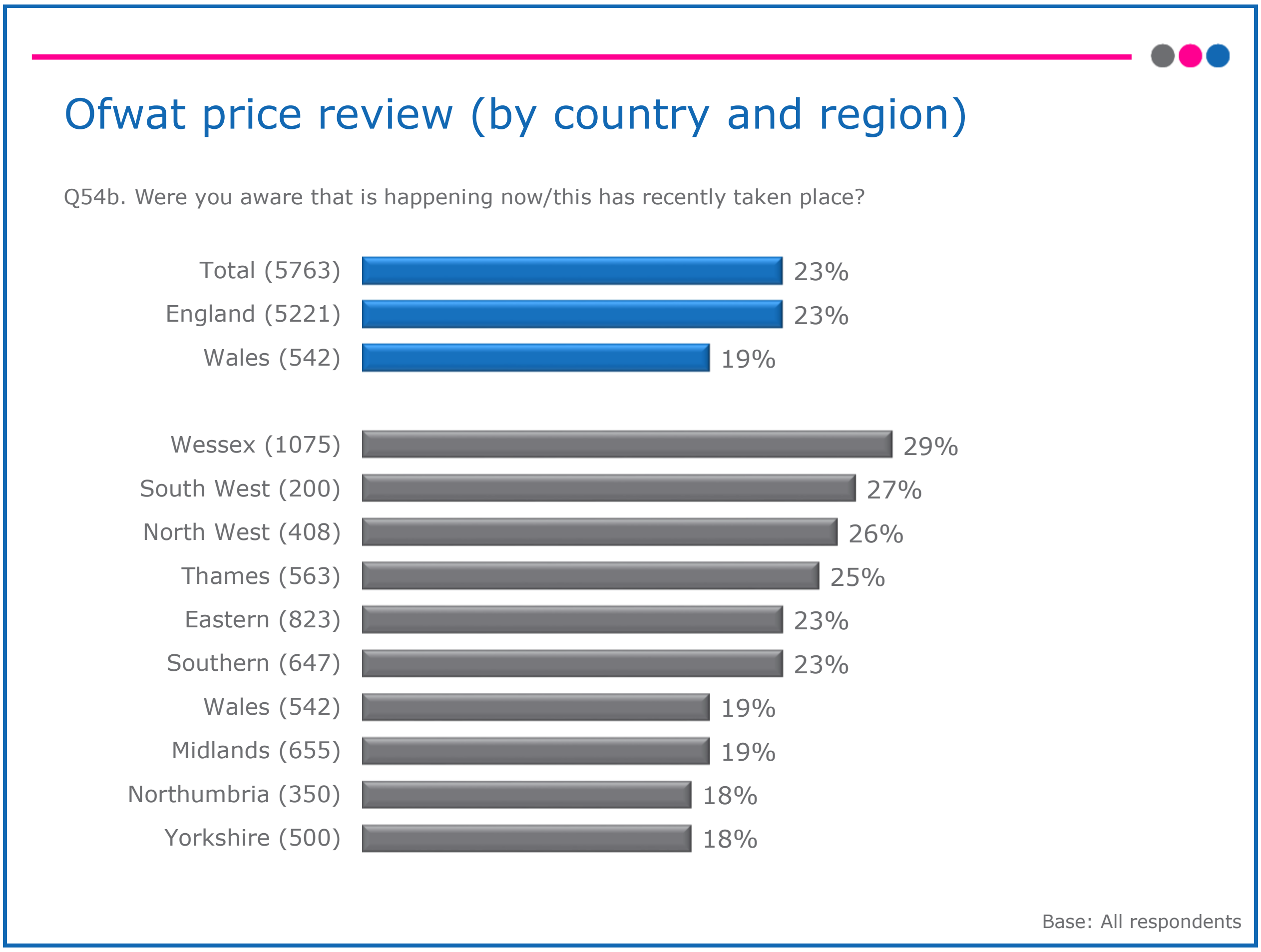
Figure 78: Awareness of Ofwat price review



7.4.2 Customers in England were slightly more aware of the price review than those in Wales. Significantly more Welsh than English customers were unaware of the price review (80% compared to 76%).

7.4.3 There are some regional differences. Around a quarter of customers in six regions were aware of the review whilst this dropped to about a fifth in the other four. Customers in the Wessex region were most aware of the price review (29%) and those in Yorkshire and Northumbria the least (18%).

Figure 79: Awareness of Ofwat price review by country and region



7.4.4 Higher levels of awareness can be found amongst the following groups:

- Middle and older age groups (22% of 45-59, 31% of 60-74 and 28% of 75+ age group compared to 12% of 18-29 and 17% of 30-44 age group)
- Metered customers (27% compared to 20% of those without a meter)
- Those with a disability themselves (26% compared to 23% without)
- Those not on benefits (24% compared to 21% receiving them).

8. Comparison of England and Wales

In this chapter we summarise the findings on key measures across England and Wales[19] in the same order as the main body of the report.

8.1 Value for money

8.1.1 There are no significant differences in 2014 between England and Wales on the key measures of value for money, fairness and affordability. The lead Wales had over England in 2013 has disappeared, largely due to satisfaction increasing more in England than in Wales.

8.1.2 Satisfaction with value for money of water services is similar in England and in Wales, whereas a year ago customers in Wales were far more satisfied than those in England. This is due to a significant rise in satisfaction amongst English customers since 2013 (75% from 69% in 2013).

8.1.3 The same is true for sewerage services. Satisfaction with value for money is now on a par in England and Wales, due to a significant rise of 7% in the satisfaction levels of English customers.

8.1.4 Perceptions of fairness and affordability are similar across the two countries, having both risen significantly.

8.1.5 Agreement on bill clarity is the same across the two countries, as is the likelihood of customers contacting their provider if they were worried about their bill.

8.2 Consumer rights and responsibilities

8.2.1 Awareness of tariff options to help those on low incomes and Special Assistance services are similar across both countries.

[19] For analysis purposes, the nation of Wales comprises customers of Welsh Water and Dee Valley Water for water services, and customers of Welsh Water for sewerage services. A few of these customers live just over the border in England, but as they get their water and/or sewerage services from a company based in Wales they are included in the analysis for Wales rather than England.

8.2.2 Significantly fewer customers have water meters in Wales than in England (36% compared to 43%), whereas the figures were similar (and higher) in 2013.

8.2.3 A slightly higher proportion of unmetered customers in Wales than in England are aware that they can request a meter to be fitted free of charge (57% compared to 53%) but this is significantly fewer in both countries than in 2013. However, there is no difference in awareness between English and Welsh customers about the 12 month trial period.

8.2.4 Awareness of the GSS scheme to compensate for service failure is the same across the two countries.

8.2.5 The proportions of customers contacting their water provider are similar across England and Wales (15% and 13%) but the significant decrease in contacts in 2014 is even more marked in Wales, where 20% contacted their provider in 2013.

8.2.6 Whereas in 2013 satisfaction with contact handling was slightly higher in Wales than in England, it is now the same (83% in England and 82% in Wales) due to a significant increase in satisfaction amongst English customers.

8.2.7 Awareness of the rainwater drainage rebate is significantly lower in Wales than in England (11% compared to 17%).

8.3 Water on tap

8.3.1 Customers in Wales are more satisfied with their water supply than those in England and the significant differences are related to the water itself rather than its delivery. The biggest difference concerns the hardness/softness of water, where nearly all Welsh customers (94%) compared to just over three-quarters of English customers (76%) are satisfied.

8.3.2 The same very high levels of overall satisfaction are seen across customers in England and Wales, consistent with the picture in 2013. However, customers in Wales are significantly more likely to be very satisfied (69% compared to 59% in England).

8.3.3 There is little difference in awareness between customers in England and in Wales. More customers in England correctly think that they are responsible (72% compared to 67% in Wales).

8.3.4 Customers in England are more likely to recall receiving information about frozen pipes than in Wales (23% compared to 17%), as opposed to 2013 when recall was similar. However, customers in Wales are more likely to have taken action to avoid this problem (50% compared to 45% in England).

8.4 A sewerage system that works

8.4.1 There is no significant difference between customers in England and Wales in satisfaction with the various elements that make up the sewerage service, although Welsh customers give the same or slightly higher ratings for all of them. This could be why overall satisfaction with sewerage services is significantly higher in Wales than in England (94% compared to 91%).

8.4.2 Homeowners in Wales are more likely than those in England to correctly identify their sewerage company as being responsible for shared sewerage pipes (38% compared to 33% of homeowners in England).

8.5 Comparisons with other utilities

8.5.1 There is no difference between English and Welsh customers when it comes to their views on how much their water company cares, nor are trust levels different between English and Welsh customers.

8.5.2 The Net Promoter Score (NPS) is higher for Wales than England (+36 compared to +22). Wales has significantly more promoters than England (52% compared to 44%) and significantly less detractors (16% compared to 23%).

8.6 Speaking up for water customers

8.6.1 Customers in England and Wales hold similar views on the importance of having a consumer body to protect their interests and a similar proportion are aware of CCWater, when prompted.

8.6.2 There is no difference of opinion between customers in England and Wales on the 21 pence charge levied on customers to pay for CCWater.

8.6.3 Significantly more Welsh than English customers were unaware of the Ofwat price review (80% compared to 76%).

9. Conclusions

9.1 Overall, the picture is much more positive in 2014 compared to 2013. Many measures of customers' views have improved significantly:

- All the measures to do with charges, i.e. value for money, fairness and affordability.
- Satisfaction with contact handling and feeling that the company cares about the service it provides.
- Perhaps as a reflection of the above measures, trust has also improved.
- Satisfaction with all elements of the sewerage service and three of the six measures that go to make up water supply service.
- Overall satisfaction with water and sewerage services.

9.2 However, to put this into context, satisfaction with value for money and overall satisfaction scores for all other household service providers (except Council Services) have also seen a considerable increase since 2013.

9.3 The increase in satisfaction for utility companies is supported by UKCSI report referenced in the body of the report (see section 6.3).

9.4 As in previous years, regional performance differs considerably. The Northumbria region continues to have the most satisfied customers and the South West remains the lowest rated region, although several key measures have improved since last year. These differences are brought sharply into focus with the Net Promoter Score (NPS). The score in the Northumbria region is a very high +43 compared with -20 for the South West region, the latter being the only region with a negative NPS.

9.5 Compulsorily metered customers are significantly less likely to agree their bill is affordable or charges are fair compared to meter optants or customers who have moved into a house already with a meter.

9.6 Awareness of CCWater continues to be low (1% unprompted) but over 7 in 10 (73%) feel that it is important to have a body to represent their interests, which is small but significant increase over 2013 (70%).

9.7 The results of this year's survey show that there are still high proportions of customers who do not know their rights and responsibilities:

- 40% are unaware that meters can be fitted free of charge (up from 30% in 2013). And for unmetered customers there is a similar decrease in awareness, from 62% in 2013 to 54% in 2014.
- Only 36% know that meters can be trialled for 12 months, the same as last year.

- Less than half (42%) are aware of the GSS compensation scheme for failure to meet customer service standards (similar to last year)
- Only 16% know about the rainwater drainage rebate (compared to 23% last year)
- Responsibility for maintenance of sewerage pipes is still an area of confusion for homeowners (67% of customers either don't know or have incorrect perceptions for sewerage pipes).

9.8 Finally, the cluster analysis carried out this year found 59% of customers in the 'Very satisfied' cluster compared to 46% last year, and fewer customers in the 'Dissatisfied' cluster – 9% this year and 16% in 2013.

10. Appendix: questionnaire

DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH
Tel: 01663-767857

Introduction
Good morning/afternoon, my name is ………………….. I am calling from DJS Research, an independent research company and we are carrying out a survey about water and sewerage services on behalf of the consumer body for the water industry. Could you spare some time to answer some questions?

READ OUT IF NECESSARY
Survey Details
The survey should take around 20 minutes and is used to help ensure that you get good services from your water and/or sewerage company. 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.

INT: READ OUT: Just to let you know, calls may be recorded for quality and training purposes

Willing to take part	**1**	**Continue**
Not willing to take part	**2**	**Thank & close**

READ OUT: During the survey I'm going to ask you about a number of services which water companies provide. If you say that you'd like to know about any of these, I'll give you the telephone number for your water company at the end of the interview.

INT INSTRUCTION - Although the focus of the survey is on water, we will also be asking you a few questions about other utility suppliers such as energy and landline suppliers. This is so that comparisons can be made between water and other utility suppliers. It is not for sales purposes.

Screener Questions

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: **S1 Are you the water bill payer in your household?** INTERVIEWER INSTRUCTION: **If respondent says that they pay their water bill as part of rent code as 2**. SINGLE CODE		
Yes	1	
No	2	S3
Don't know	85	S2
ASK IF NO/DON'T KNOW AT S1. OTHERS GO TO S2 **S2 Is there somebody else in the household who is the bill payer?** SINGLE CODE		
Yes	1	RETURN TO INTRO
No	2	CLOSE
Don't know	85	
ASK ALL **S3 And which of the following applies to the way you pay your bills…** READ OUT		
Sole bill payer	1	
You share payment of the bill with spouse/partner	2	
You share payment of the bill as part of shared house	3	
Other (specify)	80	
Don't know	85	
ASK ALL **S4 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. Passenger Focus, Energy Ombudsman	2	
Which?, Citizens Advice	3	
Market Research	4	
None of the above	87	D1
ASK ALL **D1 Please record the gender of the respondent** DO NOT ASK		
Male	1	
Female	2	
ASK ALL **D2 Which of the following age groups do you fall into?** READ OUT SINGLE CODE		
18-19	1	
20-24	2	
25-29	3	
30–44	4	
45–59	5	
60-64	6	
65-74	7	
75+	8	
Refused	86	
ASK IF CODE 4-6 AT D2. OTHERS GO TO D4 **D3 Are you retired?** SINGLE CODE		
Yes	1	
No	2	
Refused	86	

ASK ALL **D4 Which of the following describes your phone and internet provision <u>at home</u>?** SINGLE CODE I do not have a landline in my household at all I have a landline for broadband, but don't use it for telephone calls I have a landline for telephone calls and broadband I have a landline for telephone calls. I do not have broadband Refused	 1 2 3 4 86	
The next few questions are about your occupation, and they help us make sure that a good mix of people take part in this survey.		
ASK ALL Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job. **D5 Do you (did you) work as an employee or are you (were you) self-employed?** SINGLE CODE. READ OUT IF NECESSARY Employee Self-employed with employees Self-employed/freelance without employees Not applicable - Long term unemployed/never worked Not applicable - Full time student	 1 2 3 4 5	 D6 D7 D8 Q1a Q1a
ASK ALL EMPLOYEES (D5/1) **D6 How many people work (worked) for your employer at the place where you work (worked)?** READ OUT IF NECESSARY 1-24 25 or more	 1 2	 NOW GO TO D8
ASK ALL EMPLOYERS (D5/2) **D7 How many people do (did) you employ?** 1-24 25 or more	 1 2	 NOW GO TO D8
ASK ALL EMPLOYEES (D5/1-2) **D8 Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)** Yes No	 1 2	 NOW GO TO D9

ASK ALL EMPLOYED (D5/1-3) **D9 Which of the following best describes the sort of work you do? If you are not working now, please tell me which one describes what you did in your last job.** SINGLE CODE ONLY. READ OUT TEXT IN BOLD ONLY, USE PROMPTS WHERE NECESSARY		
Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer	1	
Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse	2	
Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive	3	
Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver	4	
Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant	5	
Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff	6	
Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican	7	
Traditional professional occupations such as: accountant - – solicitor – medical practitioner – scientist – civil/mechanical engineer	8	
Refused	86	

ASK ALL **Q1aWho is your water company? (This may be a company which deals with your sewerage too.)** SINGLE CODE		
Anglian Water Services Ltd	1	Q2
Dŵr 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		Q3
Sembcorp Bournemouth Water Plc	11	
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	CLOSE
Dee Valley Water Plc	15	Q3
Essex & Suffolk Water	16	
Affinity Water South East (formerly Veolia Water Southeast and Folkestone & Dover Water Services)	17	
Hartlepool Water Plc	18	
Portsmouth Water Plc	19	
South East Water Plc (including Mid Kent Water Plc)	20	
South Staffordshire Water Plc	21	
Sutton & East Surrey Water Plc	22	
Affinity Water East (formerly Veolia Water East Ltd and Tendring Hundred Water Services)	23	
Affinity Water Central (formerly Veolia Water Central and Three Valleys Water)	24	
Don't know	85	Go to Q1b
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 **Q1b Is your postcode <*insert from sample*>?**		
Yes, same as sample	1	GO TO Q1c
Incorrect – Enter correct postcode (first part and first digit of second part)	2	

IF CODE 2 AT Q1b POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE		
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 **Q1c In your area, your water company is likely to be** [insert name of water company]. **Does that sound right?**		
Yes	1	GO BACK AND CODE Q1A THEN TO FILTER AT Q2
No	2	CLOSE
ASK IF CODES 1-10 AT Q1A. OTHERS GO TO FILTER AT Q3 **Q2And do they also provide your sewerage services, or do you have a septic tank?** INTERVIEWER NOTE: PLEASE CLARIFY IF ASKED. It's a tank in your garden which collects waste from toilets etc and has to be emptied by a specialist company every so often.		
Provide sewerage services	1	
Have septic tank	2	GO TO Q6
Different company provides my sewerage services	3	CLOSE
Don't know	85	GO TO Q6
ASK IF CODES 11-24 AT Q1a. OTHERS GO TO FILTER AT Q7a **Q3 Do you have a septic tank?**		
Yes	1	FILTER AT Q7a
No	2	Q4
ASK IF CODE 2 AT Q3. OTHERS GO TO FILTER AT Q7a **Q4 Were you aware that your sewerage services are provided by another company?**		
Yes	1	Q5a
No	2	Q5b
ASK IF CODE 1 AT Q4. OTHERS GO TO FILTER AT Q5b **Q5a And who is your sewerage company?** ADD IF NECESSARY: **the bill from your water company will also say who provides your sewerage services.** SINGLE CODE		
Anglian Water Services Ltd	1	FILTER AT Q7a
Dŵr 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	85	Q5b

IF NO AT Q4 OR DON'T KNOW (CODE 85) AT Q5a, REFER TO SAMPLE AND ASK: **Q5b Is your postcode <*insert postcode from sample*>?** Yes, same as sample Incorrect – Enter correct postcode (first part and first digit of second part)	 1 2	
Q5c In your area, your sewerage company is likely to be [insert name of water company]. **Does that sound right?** Yes	 1	GO BACK & CODE Q5a THEN TO FILTER AT Q7a
No	2	CLOSE
ASK ALL **Q6 Does your household have a water meter?** SINGLE CODE Yes No Don't know	 1 2 85	

Company Information

ASK COMBINED BILLS ((Q1aStore in [2,3,5,7,8,9,10]) and (Q2 in [1,85])) or ((Q1aStore in [12,13,15,18,21,23,24]) and (Q3 = 2)) or ((Q1aStore in [1,2,3,4,5,6,7,8,9,10]) and (Q2 in [1,85]) and (Q6 = 1)) **Q7a How much do you agree or disagree that your water and sewerage bill makes it clear how much needs to be paid and when?** SINGLE CODE. READ OUT IF NECESSARY Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 85	
ASK SEPARATE BILLS ((Q1aStore in [1,4]) and (Q6 in [2,85])) or ((Q1aStore in [11,16,17,19,20,22]) or ((Q1aStore in [2,3,5,6,7,8,9,10]) and (Q2 = 2)) or ((Q1aStore in [12,13,15,18,21,23,24]) and (Q3 = 1)) **Q7b How much do you agree or disagree that your water bill makes it clear how much needs to be paid and when?** SINGLE CODE. READ OUT IF NECESSARY Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 85	

ASK SEPARATE BILLS ((Q1aStore in [1,4]) and (Q6 in [2,85]) and (Q2 in [1,85])) or ((Q1a in [11,16,17,19,20,22]) and (Q3 = 2)) **Q7c How much do you agree or disagree that your sewerage bill makes it clear how much needs to be paid and when?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK COMBINED BILL ((Q1aStore in [2,3,5,7,8,9,10]) and (Q2 in [1,85])) or ((Q1aStore in [12,13,15,18,21,23,24]) and (Q3 = 2)) or ((Q1aStore in [1,2,3,4,5,6,7,8,9,10]) and (Q2 in [1,85]) and (Q6 = 1)) **Q8a And do you agree or disagree that it is clear how the final amount of your bill was reached?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK SEPARATE BILLS ((Q1aStore in [1,4]) and (Q6 in [2,85])) or ((Q1aStore in [11,16,17,19,20,22]) or ((Q1aStore in [2,3,5,6,7,8,9,10]) and (Q2 = 2)) or ((Q1aStore in [12,13,15,18,21,23,24]) and (Q3 = 1)) **Q8b And do you agree or disagree that it is clear how the final amount of your water bill was reached?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK SEPARATE BILLS ((Q1aStore in [1,4]) and (Q6 in [2,85]) and (Q2 in [1,85])) or ((Q1a in [11,16,17,19,20,22]) and (Q3 = 2)) **Q8c And do you agree or disagree that it is clear how the final amount of your sewerage bill was reached?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL **Q9 Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?** SINGLE CODE. READ OUT		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (SEPTIC TANK) **Q10 How satisfied or dissatisfied are you with the <u>value for money</u> of the <u>sewerage services</u> in your area?** SINGLE CODE. READ OUT IF NECESSARY Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	 1 2 3 4 5 85	
ASK ALL **Q11 We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity?** SINGLE CODE ONLY Yes, both gas and electricity No – gas and electricity from separate companies Don't have mains gas Don't know	 1 2 3 85	
Q12Thinking now about other household utility services, how satisfied or dissatisfied are you with the <u>value for money</u> from services such as...?: READ OUT EACH SERVICE & SINGLE CODE. READ OUT SCALE, DO NOT READ OUT NUMBERS *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.* a) Your gas service **ASK IF CODE 1-2,85 AT Q11** b) Your electricity service **ASK ALL** c) Your broadband services **ASK IF CODE 2-3 AT D4** d) Your telephone landline services **ASK IF CODE 2-4 AT D4** e) Council services **ASK ALL**		
ASK IF CODED 1 OR 2 AT Q12: a OR b AND CODED 3, 4, 5 AT Q9 AND Q10 (Q9 ONLY IF SEPTIC TANK) **Q13a Why do you say that you are more satisfied with the value for money of your gas or electricity service than your water and/or sewerage services?** TYPE IN VERBATIM COMMENT & THEN CODE FROM LIST. MULTICODE OK **[OPEN QUESTION]** Cheaper/better value Able to switch/not a monopoly Water and/or sewerage too expensive/have monopoly/charge what they like Good/better deal/get it free/package suits me Good service/better customer service/staff helpful/quick to sort problems No choice of water company/no negotiation/cannot change company No complaints/problems/satisfied Lack of contact/lack of information/don't know much/don't think about water company/bills just appear Poor service/ issues (i.e. meter problems, drains blocked, flooding, broken pipes, cut water supply) More/ better choice More transparent/ know what I am getting Better technology/ manage bills on line Good communication/ information/ bill every month Other (please specify) Don't know	 1 2 3 4 5 6 7 8 9 10 11 12 13 80 85	

ASK IF CODED 1 OR 2 AT Q12: c OR d AND CODED, 3, 4, 5 AT Q9 OR Q10 (Q9 ONLY IF SEPTIC TANK) **Q13b Why do you say that you are more satisfied with the value for money of your landline or broadband service than your water and/or sewerage services?** TYPE IN VERBATIM COMMENT & THEN CODE FROM LIST. MULTICODE OK **[OPEN QUESTION]** **SAME LIST AS AT Q13a**		
ASK ALL **Q14 How much do you agree or disagree that the** [CODE 2 AT Q2 OR 1 AT Q3 = '**water'**]**/**[ALL OTHERS = **water and sewerage] charges that you pay are fair?** SINGLE CODE. READ OUT IF NECESSARY Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 85	
ASK IF DISAGREE (CODES 4-5) AT Q14. OTHERS GO TO FILTER AT Q16a **Q15 Why do you think that the** [CODE 2 AT Q2 OR 1 AT Q3 = '**water'] /**[ALL OTHERS = **water and sewerage] charges that you pay are unfair?** DO NOT READ OUT. MULTICODE Expensive/prices have risen Rates are unfair/should depend on size of household Profits/shareholders paid too much Poor/inefficient service Poor water quality Prices vary by region/prices should be the same everywhere Had to go on a meter/no choice in having a meter Other (specify) Don't know	 1 2 3 4 5 6 7 80 85	
ASK ALL CODED 1-10 AT Q1A (WaSCs) **Q16a How much do you agree or disagree that the** [CODE 2 AT Q2 OR 1 AT Q3 **= 'water']** /[ALL OTHERS **= 'water and sewerage'] charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 85	
ASK ALL CODED 11-24 AT Q1A (WOCs) **Q16b How much do you agree or disagree that the water charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 85	

ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WOCs) **Q16c How much do you agree or disagree that the sewerage charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WOCs) **Q16d How much do you agree or disagree that the total water and sewerage charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL SOUTH WEST WATER CUSTOMERS (Q1a/5 OR Q5a/5) **From April 2013, the Government has introduced an annual contribution of £50 towards water and sewerage bills for customers of South West Water** **Q17 Before this interview, were you aware of this Government contribution to your bill?** SINGLE CODE		
Yes	1	
No	2	

Section B: Consumer Rights and Responsibility

ASK ALL **Q18 How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill?** READ OUT. SINGLE CODE		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	85	
ASK IF WATER METER (CODE 1 AT Q6). OTHERS GO TO Q20 **Q19 You said earlier that your household had a water meter, which of the following apply to you?** SINGLE CODE		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
Other (specify)	80	
Don't know	85	

ASK ALL EXCEPT AFFINITY SE AND SOUTHERN WATER (CODES 17, 6 AT Q1a) AND SOUTH EAST WATER – SAMPLE 2 (CODE 20 AT Q1A AND FLAGGED SAMPLE 2 IN SAMPLE FILE) AND THAMES WATER – SAMPLE 2 (CODE 7 AT Q1A AND FLAGGED SAMPLE 2 IN SAMPLE FILE)EXCLUDE Q19/3 **Q20 Were you aware that …:** SINGLE CODE FOR EACH STATEMENT **Scale: 1=Yes, 2= No, 85= Don't know** a) When requested, water meters are fitted free of charge b) If you ask for a meter to be fitted, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can go back to a water rate charge for your property. There are no extra charges made for trialling this service		WILL BE ROUTED FROM POST-CODE
INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is already charged for water via a meter you cannot go back to a water rate charge.		
ASK ALL **Q21 Are you aware of or are you currently on** [CODE 2 AT Q1a = '**Welsh Water Assist'/**ALL OTHERS = **'WaterSure'] 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 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 85	

ASK ALL, BRING IN RELEVANT CODES AS INDICATED

Q22 Are you aware of any <u>other</u> schemes offered by XX Water [or XX Water] which provide lower charges for customers who struggle to afford their bills? IF YES, **What are they?** DO NOT READ OUT. MULTICODE OK

Anglian Water/Hartlepool Water (Q1a/1,18) **Anglian Water Assistance Fund**		
Aquacare Plus		
Dwr Cymru (Q1a/2) **Welsh Water Assist**		
Customer Assistance Fund		
Severn Trent Water (Q1a/4) **Severn Trent Trust Fund**		
South West Water (Q1a/5) **Watercare tariff**		
WaterCare Plus		
Restart		
Fresh Start		
Southern Water (Q1a/6) **Southern Water Trust Fund**		
New Start		
Support tariff		
Thames Water (Q1a/7) **Charitable Trust**		
WaterSure Plus		
Customer Assistance Fund		
United Utilities (Q1a/8) **Charitable Trust**		
Support Tariff		
Arrears Allowance Scheme		
Wessex Water (Q1a/9) **Restart**		
Restart Plus		
Assist		
WaterSure Plus		
Yorkshire Water (Q1a/10) **Yorkshire Water Community Trust**		
Resolve		
Sembcorp Bournemouth (Q1a/11) **Assistance Fund**		
Bristol Water (Q1a/12) **Restart**		
Restart Plus		
Assist		
WaterSure Plus		
~~Cambridge Water (Q1a/13)~~ ~~**NewStart**~~		
Affinity Water (Q1a/17,23,24) **Li£t (pronounced Lift)**		
South East Water **Helping Hands Scheme**		
South Staffs Water (Q1a/21) **South Staffs Water Charitable Trust Fund**		
Sutton and East Surrey (Q1a/22) **Social tariff**		
Clear Start		
<ALL> Other (specify)		
No, not aware of any		

ASK ALL

Q24 Did you know that if none of the rainwater that runs off a property drains into the public sewer (e.g. it may drain into a soakaway or the ground); a reduced sewerage bill is available? SINGLE CODE

Yes, but haven't done anything about it	1	
Yes, I have done something about it	2	
No, but would like to know more	3	
No, but doesn't apply to me	4	

ASK ALL **Q25 Are you aware of any additional services offered by your water company, such as large print or braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water?** 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 85	
ASK ALL **Q26 Were you aware that if your** [CODE 2 AT Q2 OR 1 AT Q3 = **'water'] /**[ALL OTHERS = **water and 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 No, was not aware Don't know	 1 2 85	
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 or their website		
ASK ALL **Q27a Who do you think is responsible for maintaining <u>the water pipes</u> within your property's boundaries?** DO NOT PROMPT.SINGLE CODE I am/the householder Landlord Organised through my insurance The local council The water company Other (please specify) Don't know	 1 2 3 4 5 80 85	
INTERVIEWER NOTE: If asked, after responding, 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 their property meets the public highway)		
ASK ALL EXCEPT CODE 2 AT Q2 OR 1 AT Q3 **Q27b Who do you think is responsible for maintaining any <u>shared sewerage pipes</u> and drains that run within your property's boundaries? By <u>Shared sewerage pipes</u> we mean pipes serving more than one property.** DO NOT PROMPT.SINGLE CODE I am/the householder Landlord Organised through my insurance The local council The water/sewerage company Other (please specify) Don't know	 1 2 3 4 5 80 85	

INTERVIEWER NOTE: If asked after responding, the correct answer is that the sewerage company is responsible for the maintenance of sewerage pipes and drains which serve more than one property, including those within your property boundary. **The homeowner is responsible for maintaining a sewer or drain when it serves their property only and is within the boundary of their property**		
ASK ALL **Q28 Have you contacted your water and/or sewerage company in the past 12 months?** SINGLE CODE		
Yes – water and sewerage company	1	Q29
Yes – water company	2	
Yes – sewerage company	3	
No	4	Q33a
Don't know	85	
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q29 What was your most recent contact about?** DO NOT READ OUT. MULTICODE OK		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	
To make an enquiry about sewers and drains (transfer)	4	
Billing enquiry	5	
No supply/supply issue	6	
To report a leak	7	
To change to/ask for a water meter	8	
Water quality	9	
Water pressure	10	
Sewerage problem	11	
To enquire about programme to fit meters	12	
To enquire about hosepipe ban	13	
To ask about schemes/help paying bills	14	
Other (please specify)	80	
Don't know	85	
ASK ALL (EXCLUDE Q29/1) AND Q2/2, 85 OR Q3/1 **Q33a In the last 12 months, do you think you had reason to complain about your water and/or sewerage services and didn't?** SINGLE CODE		
Yes	1	Q33b
No	2	Q34

ASK ALL COMPLAINED Q33a/1 OR Q29/1. OTHERS GO TO Q34 **Q33b What caused your dissatisfaction** DO NOT READ OUT. MULTICODE OK		
Billing error	1	
No supply/supply issue	2	
Leak on property	3	
Leak in public place	4	
Problem with water meter installation	5	
Problem with water meter calculation/incorrect meter reading	6	
Water quality	7	
Water pressure	8	
Sewerage problem	9	
Engineer appointment not kept	10	
Engineer work not satisfactory	11	
Company staff not helpful	12	
Other (please specify)	80	
Don't know	85	
ASK IF YES AT Q33a (CODE 1). OTHERS GO TO Q34 **Q33c Why didn't you contact your water and/or sewerage company about your complaint?** DO NOT READ OUT. MULTICODE OK		
Problem resolved itself		
Didn't think they **could** help	1	
Didn't think they **would** help	2	
Didn't have the time to contact them	3	
Unsure how to make contact	4	
Had previous bad experience with their customer service	5	
Tried to contact but could not get through	6	
Already contacted them about this and they didn't help	7	
Other (please specify)	8	
May yet contact them	80	
Don't know	9	
	85	
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q30Thinking about this contact with** [CODE 1 OR 2 AT Q28 = '**insert code given at Q1a'] /**[CODE 3 AT Q28 AND CODE 11-24 AT Q1A = **insert code given at Q5a] /**[CODE 3 AT Q28 AND CODE 1-10 AT Q1A = **insert code given at Q1a], overall how satisfied were you with....** READ OUT EACH STATEMENT & SINGLE CODE. ROTATE STATEMENTS. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable. 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 contact had been, or would be, resolved e) The way that the water company has kept you informed of progress with your enquiry/complaint/claim		

ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q31 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with** [CODE 1 OR 2 AT Q28 = **'insert code given at Q1a'] /**[CODE 3 AT Q28 AND CODE 11-24 AT Q1A = **insert code given at Q5a] /**[CODE 3 AT Q28 AND CODE 1-10 AT Q1A = **insert code given at Q1a]?** SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	
ASK ALL **Q32 And overall, how much effort did it take you to get your query answered?** SINGLE CODE ONLY. READ OUT SCALE		
More than I expected	1	
About what I expected	2	
Less than I expected	3	

Section C: Water on Tap

ASK ALL **Q34 How satisfied are you with the following aspects of your water supply:** READ OUT EACH STATEMENT & SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= 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	
ASK ALL **Q35 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your <u>water</u> supply?** SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

ASK IF CODE 4 OR 5 AT Q35. OTHERS GO TO Q37a **Q36 Did any of the following influence your overall satisfaction?** READ OUT. MULTICODE OK. RANDOMISE LIST		
The level of profits made	1	
My bill	2	
Personal experiences	3	
It's a privatised company	4	
Customer service	5	
Views about the water industry in general	6	
The water industry in general	7	
Media stories	8	
Word of mouth	9	
Other (SPECIFY)	80	
None of these	87	
ASK ALL **Q37a Have you received or come across any information in the last 12 months on how to avoid your water pipes freezing?** SINGLE CODE ONLY		
Yes	1	
No	2	
Don't know	85	
ASK ALL **Q37b Has your household taken any measures to avoid having frozen water pipes this winter? SINGLE CODE ONLY**		
Yes	1	
No	2	
Don't know	85	

Section D: Keeping it Clean

ASK ALL **Q38 Which of the following do you think are ok 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	
Medicines	9	
Wet wipes	10	
Tissues (e.g. kleenex)	11	
Baby wipes	12	
None of these – **DO NOT READ OUT**	87	
Don't know – **DO NOT READ OUT**	85	
INTERVIEWER NOTE: If asked after response has been given, none of these is ok		

DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (SEPTIC TANK) **Q39 How satisfied are you with your sewerage company's management of the following aspects of their service....:** READ OUT EACH STATEMENT AND SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85 = don't know 98 = not applicable.* 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		
DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (SEPTIC TANK) **Q40a Taking all those aspects into account, overall how satisfied or dissatisfied are you with your <u>sewerage</u> service?** SINGLE CODE. READ OUT IF NECESSARY Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	 1 2 3 4 5 85	
ASK IF CODE 4 OR 5 AT Q40a. OTHERS GO TO Q41 **Q40b Did any of the following influence your overall satisfaction?** READ OUT. MULTICODE OK. RANDOMISE LIST The level of profits made My bill Personal experiences It's a privatised company Customer service Views about the water industry in general The water industry in general Media stories Word of mouth Other (SPECIFY) None of these	 1 2 3 4 5 6 7 8 9 80 87	
ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY **Q41 Now, thinking about other household services you receive, how satisfied or dissatisfied are you with:...?: READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.* a) Your gas service **ASK IF CODE 1-2, 85 AT Q11** b) Your electricity service **ASK ALL** c) Your broadband services **ASK IF CODE 2-3 AT D4** d) Your telephone landline services **ASK IF CODE 2-4 AT D4** e) Council services **ASK ALL**		

ASK ALL **Q42 How much do you agree or disagree that your water** [IF CODES 1-10 AT Q1A AND Q2/1, 85 also insert **'and sewerage']** **company cares about the service it gives to customers? READ OUT IF NECESSARY. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL **Q43 How much do you agree or disagree that your** [IF CODE 1 AT Q11 = **'energy';** IF CODE 2 AT Q11 = **'gas or electricity'**; IF CODE 3 AT Q11 = **'electricity'] company cares about the service it gives to customers? READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL **Q44a How much do you trust your** [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a = **'water'] /** [ALL OTHERS = **'water and sewerage'] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	Q44b
	2	
	3	
	4	
	5	
	6	
	7	Q45
	8	
	9	
Trust them completely	10	
Don't know	85	
ASK IF CODES 1-4 AT Q44a. OTHERS GO TO Q45 **Q44b Why do you give a score of** *<insert code from Q44a>***? TYPE IN**		
Don't know	85	

ASK ALL **Q45 How much do you trust your** [IF CODE 1 AT Q11 = **'energy';** IF CODE 2 AT Q11 = **'gas or electricity'**; IF CODE 3 AT Q11 = **'electricity'] company? Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Trust them completely	10	
Don't know	85	
ASK IF CODE 1 OR 2 AT Q35 AND CODE 4 OR 5 AT Q9 **Q46 You have said that you are satisfied with water services you receive, but you are dissatisfied with value for money. Why is this?** DO NOT READ OUT. MULTICODE OK		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	4	
Poor water quality	5	
Poor/inefficient service/issues not resolved	6	
Water meter issues/problems	7	
Leaking pipes	8	
Lack of visibility	9	
Not enough information/communication	10	
Profits too high	11	
Confusing bills	12	
Price isn't fair	13	
No choice/monopoly	14	
Prices for any service could probably be lower	15	
Companies aren't paying enough tax/evading tax	16	
Other (specify)	80	
Don't know	85	
ASK IF CODE 1 OR 2 AT Q40a AND CODE 4 OR 5 AT Q10 **Q47 You have said that you are satisfied with sewerage services you receive, but you are dissatisfied with value for money. Why is this? DO NOT READ OUT. MULTICODE OK**		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	3	
Poor water quality	4	
Poor/inefficient service/issues not resolved	5	
Water meter issues/problems	6	
Leaking pipes	7	
Lack of visibility	8	
Not enough information/communication	9	
Profits too high	10	
Confusing bills	11	
Price isn't fair	12	
No choice/monopoly	13	
Companies aren't paying enough tax/evading tax	14	
Other (specify)	80	
Don't know	85	

ASK (Q1a/1-10) without septic tank Q2/1, 85. **Q48a If it were possible to choose your water supplier, on a scale of 0-10, where 0 means you wouldn't be likely to recommend, and 10 means you would be extremely likely to recommend, taking everything into account, how likely would you be to recommend [`insert code given at Q1a'] to friends and family as a provider of water (**For WaSCs only without septic tank: **and sewerage services)?** SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	
ASK ALL WoCs (Q1a/11-24) without septic tank and Q3/2 **Q48b And on the same scale, how likely would you be to recommend [`insert code given at Q5a'] to friends and family as a provider of sewerage services?** SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	

Section E: Speaking up for Water Consumers

Q49. Do you know the name of the consumer body for the water industry? DO NOT READ OUT – DO NOT PROMPT		
Consumer Council for Water (CCWater)	1	Q51
Ofwat	2	Q50
TEXT SUBSTITUTE: (Company given at Q1a)	3	↓
Citizens Advice	4	
Other consumer organisation	5	
Other (specify)	80	
Don't know	85	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q49. OTHERS GO TO Q52 **Q50. Had you heard of the Consumer Council for Water before now?**		
Yes	1	Q51
No	2	Q52
Don't know	85	

ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q49, OR CODED 1 AT Q50. OTHERS GO TO Q52 **Q51. What, if anything, do you know about them?** 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	
Deals with complaints about water companies	7	
Other (specify)	80	
Nothing/not sure	87	

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 **Q52 How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?** READ OUT. SINGLE CODE		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don’t know	85	
ASK ALL **Q53 If you wanted to get in touch with Consumer Council for Water, do you know where to look for their contact details?** IF YES, ASK **Where?** DO NOT READ OUT. MULTICODE OK		
Yes:		
Online – search engine (e.g. Google)	1	
Online – water company website	2	
Online – Ofwat website	3	
Online – CCWater website	4	
Back of water bill	5	
Telephone directory	6	
Yellow pages	7	
Citizen’s Advice	8	
Other (specify)	80	
No, don’t know where to look	85	

READ OUT: Here is a bit more information about the Consumer Council for Water. As part of their role they deal with complaints about water companies, and challenge them to provide high standards of service at prices which people can afford. They are also there to answer any questions consumers may have and provide advice on water and sewerage services.		
ASK ALL **Q54 You are currently charged about 21p a year for this service as part of your water bill. How satisfied or dissatisfied are you with this in terms of value for money? READ OUT. SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	
ASK ALL **Q54b Every five years Ofwat (the regulator for the water industry) sets the prices that water companies are allowed to charge their customers over the next five years. Were you aware that this is happening now, and an announcement on future pricing is due in December?**		
Yes	1	
No	2	

Section F: Background
And finally a few questions about you

ASK ALL **Q55 How would you describe your ethnic background?** PROMPT IF NECESSARY. 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	80	
Refused	86	
ASK ALL **Q56 Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do?** MULTICODE OK FOR CODES 1/2		
Yes (self)	1	
Yes (other)	2	
No	3	
Don't know/refused	85	
ASK ALL **Q57 Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household?** READ OUT SINGLE CODE *[Scale: 0 = none, 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 86= refused.*		
a) Adults i.e. 18 years and over		
b) Children aged 6 – 17		
c) Children aged 0-5		
ASK ALL **Q57a We would like to make sure that we take account of the views of people of all incomes. Could you tell me which of the following income bands your household falls into?** **Please take account of the income of all those in the household (before tax and national insurance) and include any pensions, benefits or extra earnings.**		
Less than £10,000	1	
£10,000 to £19,999	2	
£20,000 to £29,999	3	
£30,000 to £39,999	4	
£40,000 to £49,999	5	
£50,000 to £74,999	6	
£75,000 to £99,999	7	
£100,000 or more	8	
Don't know	85	
Refused	86	

ASK ALL **Q58 And are you/someone in your household currently receiving any benefits or tax credits?** SINGLE CODE		
Yes	1	
No	2	
Don't know	85	
Refused	86	
ASK ALL **Q59 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	85	
Refused	86	
ASK ALL **Q60 Would you say you live in an urban or rural area?** READ OUT.SINGLE CODE		
Urban	1	
Rural	2	
Suburban/semi rural	3	
Don't know	85	
ASK ALL **Q61 Do you have access to the internet?**		
Yes	1	
No	2	
Don't know	85	
Refused	86	
ASK IF CODED 3 AT Q21a OR Q25a. OTHERS GO TO CLOSING STATEMENT **Q62 You said you would like to know more about additional services from your water company. To find out more, you can call ['insert code given at Q1a'] on [RELEVANT NUMBER FROM TABLE BELOW].**		
ASK ALL **Q63 Would you be happy for us to re-contact you for future research projects on behalf of CCWater?**		
Yes	1	
No	2	

Telephone Numbers

Q1a Code	Water Company	Q69a insert
1	Anglian Water Services Ltd	**03457 91 91 55**
2	Dŵr Cymru Cyfyngedig (Welsh Water)	**0800 052 0145**
3	Northumbrian Water Ltd	**03457 33 55 66**
4	Severn Trent Water Ltd	**03457 500 500**
5	South West Water Ltd	**0344 346 1010**
6	Southern Water Services Ltd	**0845 272 0845**
7	Thames Water Utilities Ltd	**0800 980 8800**
8	United Utilities Water Plc (North West Water)	**Metered (Q6/1) 0345 672 2999**
		Unmetered (Q6/2) 0345 672 2888
9	Wessex Water Services Ltd	**0345 600 3 600**
10	Yorkshire Water Services Ltd	**0345 1 24 24 24**
11	Sembcorp Bournemouth Water Plc (Sembcorp)	**01202 590059**
12	Bristol Water Plc	**0345 600 3 600**
13	Cambridge Water Company Plc	**01223 706050**
15	Dee Valley Water Plc	**01878 833 200**
16	Essex & Suffolk Water	**03457 820111**
17	Affinity Water SouthEast	**0345 357 2402**
18	Hartlepool Water Plc	**01429 858 030**
19	Portsmouth Water Plc	**023 9249 9666**
20	South East Water Plc (including Mid Kent Water Plc)	**0333 000 0001**
21	South Staffordshire Water Plc	**0845 60 70 456**
22	Sutton & East Surrey Water Plc	**01737 772 000**
23	Affinity Water East	**0345 357 2402**
24	Affinity Water Central	**0345 357 2402**

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 0121 345 1000 or visit their website at www.ccwater.org.uk
Should you want to contact the MRS (the Market Research Society) to verify that DJS Research comply with the code of conduct you can call them on 0500 39 69 85.

11. Appendix: sample profile

Figure 80: Sample profile

	Unweighted		Weighted	
	No	**%**	**No**	**%**
Total	**5763**	**100%**	**5763**	**100%**
Region				
Eastern	823	14%	651	11%
Midlands	655	11%	939	16%
North West	408	7%	757	13%
Northumbria	350	6%	296	5%
South West	200	3%	168	3%
Southern	647	11%	461	8%
Thames	563	10%	1347	23%
Wales	542	9%	336	6%
Wessex	1075	19%	282	5%
Yorkshire	500	9%	527	9%
Age				
18-29	268	5%	309	5%
30-44	1500	26%	1529	27%
45-59	1909	33%	1938	34%
60-74	1325	23%	1259	22%
75+	761	13%	728	13%
Household composition				
Households without children	3648	63%	3580	62%
Households with children	1845	32%	1925	33%
Refused	270	5%	258	4%
Gender				
Male	2675	46%	2704	47%
Female	3088	54%	3059	53%
Type of Company				
Water and Sewerage Company (WaSC)	3505	61%	3644	63%
Water only Company (WoC)	2258	39%	2119	37%

Contact us...

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