CONSUMER COUNCIL FOR Water

Annual Tracking Survey 2009
Report by FDS International

March 2010

a Munro group company

1. Executive Summary

1.1 Understanding the views and opinions of consumers is key to effectively delivering the business objectives of the Consumer Council for Water (CCWater) and for the organisation to continue to provide a strong voice for consumers of the water industry in England and Wales.

1.2 In 2006 CCWater undertook a baseline survey of consumer views. From 2007-2009 FDS International has continued this survey, building on the previous results and tracking changes in the views of water and sewerage customers over time.

1.3 Below are some of the key findings from the 2009 survey:-

Value for money

1.3.1 Seven in ten respondents (69%) say that they are satisfied with the value for money of their water services and a similar proportion (71%) say that they are satisfied with the value for money of their sewerage services.

- As in previous years, respondents in the South West are least satisfied.

1.3.2 Mean scores for satisfaction with value for money from water and sewerage companies are slightly higher than energy suppliers, but the gap is closing with increasing satisfaction with value from energy companies.

1.3.3 Three in five customers (62%) feel that the charges they pay are fair and three quarters (74%) say that their bills are affordable.

1.3.4 Four in five customers (80%) agree that their water and sewerage bill makes it clear how much needs to be paid and when, 7% disagree and 13% are neutral/don't know. Slightly fewer (71%) agree that it is clear how the final amount of their bill was reached, with 15% disagreeing and 14% neutral/don't know.

Consumer rights and responsibilities

1.3.5 One in eleven respondents (9%) are aware of the WaterSure/Welsh Water Assist Tariff (this has increased from 7% in 2008).

1.3.6 There is a significant minority (2%) who may be eligible for WaterSure/Welsh Water Assist but are not aware.

1.3.7 A quarter of respondents (24%) say that they are aware of their water company's services available for elderly and/or disabled customers.

1.3.8 Two in five respondents (41%) have a water meter and this is significantly higher among older respondents (who are also more likely to ask to have a water meter fitted).

- 66% of those aged 75+ and 48% of 61-75 year olds have a meter fitted, compared with 38% of under 60's.

1.3.9 Two in five (41%) claim to be aware that under certain circumstances they may be entitled to compensation for service failures.

1.3.10 Overall 18% of respondents say that they have contacted their water company to make an enquiry in the past 12 months. Taking everything into account, 77% of these respondents say that they are satisfied with the contact with their water company.

Water on tap

1.3.11 There are high levels of satisfaction for all aspects of water supply, with customers most satisfied with the reliability of their water supply (96%) and least satisfied with the hardness/softness of their water (72%).

- There are wide regional variations in satisfaction with hardness/softness of water which reflect local differences in the type of tap water people receive.

1.3.12 Four in five respondents (82%) think that tap water is at least as good for them as bottled water.

1.3.13 Over half of respondents (54%) say that they would be likely to use public drinking water fountains if they were available.

- People interested in using drinking water fountains are more likely to say that they would fill a bottle rather than drink directly from a water fountain (81% compared with 61%).
- For those who would be unlikely to use them the main concern is hygiene/cleanliness.

1.3.14 Three in five respondents (60%) say they have seen campaigns to use water wisely over the past year.

1.3.15 Seven in ten (70%) say that they have taken specific actions to reduce their use of water over the past year.

Keeping it clean

1.3.16 There is some confusion among three in ten customers (29%) about what is acceptable to flush down the toilet, sink or drain.

1.3.17 87% of respondents say that they are satisfied with their sewerage services. Satisfaction with different elements of sewerage services has fallen slightly over the past year but still relatively few are dissatisfied with any aspect of their sewerage services.

1.3.18 Overall, one in twenty respondents (5%) say that they are dissatisfied with their sewerage services.

Comparisons with other utilities

1.3.19 Respondents are more likely to think that their water and sewerage company cares about the service it provides more than their energy company does (67% compared with 60%).

1.3.20 Respondents are also more likely to say that they trust their water and sewerage company rather than their energy company.

Awareness of the Ofwat price review

1.3.21 Three in ten respondents (29%) claim to be aware of the Ofwat price review with awareness much higher among older respondents (39% among those aged 61+ compared with 15% among 18-34 year olds).

1.3.22 However, there was no link between awareness of the price review and satisfaction with water and sewerage services or views on the value for money of water and sewerage services.

1.3.23 Four in five respondents (78%) expect their bills to rise over the next five years including two in five (39%) who think that they will rise by more than inflation.

Differences in results between Wales and the English regions

1.3.24 When comparing results for customers in Wales with all of the English regions combined the overall the picture is very similar. However, there are some minor differences between customer views:-

- Respondents in Wales are more likely than those in the English regions to be satisfied with value for money from sewerage services.
- Respondents in the English regions are more likely than those in Wales to say that they would contact their company if worried about paying their bill (73% compared with 65%).

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March 2010

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2. Introduction

2. 1 The Consumer Council for Water (CCWater) is the water industry watchdog, set up to represent and provide a strong national voice for consumers of water and sewerage companies in England and Wales. CCWater operates through four committees in England and a committee for Wales.

2. 2 Understanding the views and opinions of consumers is key to effectively delivering the business objectives of CCWater and for the organisation to continue to provide a strong consumer voice within the industry.

2. 3 In order to be successful in its goals, CCWater needs to represent all water consumers and have an understanding of how customers view water supply and sewage removal and treatment; the companies that provide these services; and other areas of policy/activity within the industry.

2. 4 In 2006 CCWater undertook a baseline survey of consumer views. From 2007-2009 FDS International has continued this survey, building on the previous results and tracking changes in the views of water and sewerage customers over time.

Research Aims

2. 5 This tracking research is designed to identify customer views on their water and sewerage services in order to provide an independent, reliable and justifiable platform on which CCWater can base future policy and activity.

2. 6 The main objectives of this research are to:-

- Understand customers' views about their water and sewerage services.
- Benchmark customers' views about their water and sewerage services against their views of other utilities.
- Measure changes in opinion over time.
- Explore customer perceptions of CCWater's impact and performance as their representative.
- Examine customers' views towards tap water, bottled water and public drinking water fountains.
- Help CCWater develop an effective communication strategy.

Approach

2. 7 To be consistent with the previous waves of consumer research a quantitative methodology was undertaken, using telephone interviewing to survey a random cross section of households across England and Wales.

Fieldwork

2. 8 The study was carried out using CATI (Computer Assisted Telephone Interviewing) from FDS's Telephone Centres.

2. 9 In total 2,000 interviews were achieved across England and Wales. Interviewing took place between December 2009 and January 2010. Interviewing was timed so that it did not start until at least a week after Ofwat had announced the price review final determinations.

Sample

2. 10 A random digit dialling (RDD) sample of residential telephone numbers across England and Wales was purchased from an FDS approved supplier, UK Changes.

2. 11 Quotas were set during the interviewing on region and age of respondents. The sample was stratified by water and sewerage company region to ensure robust numbers were achieved per region. That is, an equal number of interviews were achieved for each water region to enable sub-group analysis within each, rather than setting targets proportionate to the size of their customer base. We set a quota of 200 respondents for each of the nine water and sewerage company regions in England and for Wales. Respondents were screened to ensure that we only interviewed householders who were wholly or jointly responsible for paying the water and sewerage bill.

2. 12 As detailed above a stratified sampling approach was used and RDD sample was purchased on a 10:1 basis (10 leads to achieve 1 interview). The sample was also designed to be representative of households across England and Wales, rather than individuals.

Questionnaire

2. 13 In order to understand how customers' views and opinions have developed over time, it was important to maintain a high degree of consistency with the questionnaires used in previous years. Therefore the 2009 questionnaire is largely based on the previous surveys undertaken.

2. 14 The questionnaire was however further developed in liaison with CCWater, and additional questions were added, including a number of questions on public drinking water fountains as well as questions to establish potential eligibility for the WaterSure Tariff and awareness of the price review.

2. 15 As in previous years the questionnaire focussed on the following five key themes:-

- value for money
- consumer rights and responsibilities
- water on tap
- keeping it clean
- speaking up for water consumers.

2. 16 The interviews lasted for around 20 minutes, and a copy of the questionnaire is included in the appendices.

Data processing and computer tables

2. 17 Weighting has been applied to the data to ensure they are representative of household water customers. With a stratified sample (as explained in section 2.11), to enable analysis by water region, weighting was required to correct this deliberate unequal distribution of customers. Weighting was also applied for social grade and age to ensure findings are representative of households in England and Wales, and to address any minor imbalance in sample profiles. A sample profile is included in the Appendix which shows the actual number of interviews achieved against the weighted data.

2. 18 Computer tables have been provided to CCWater with each question analysed by three pages of sub-groups agreed with CCWater.

Interpretation of data

2. 19 It should be remembered results are based on a national sample of households – not a census of all households. This means all data are subject to sampling tolerances.

2. 20 The table below shows the statistical reliability of results for a total base sample size of 2000 and 200 (the number of interviews achieved per region).

	Approximate sampling tolerances applicable to percentages at or near these levels		
Base size	10% or 90%	30% or 70%	50%
2,000 *(total sample)*	±1%	±2%	±2%
200 *(200 interviews per region)*	±4%	±6%	±7%

2. 21 Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value less than half a percent but greater than zero.

2. 22 Differences between social grades are highlighted throughout the report. Social grade is established by asking respondents about their current or previous occupation (if retired) and below is a brief guide to these grades:-

- **A** Professionals, very senior managers in business or commerce or top-level civil servants
- **B** Middle management, principal officers in civil service, top managers or owners of small businesses
- **C1** Junior management, owners of small establishments and all others in non-manual positions
- **C2** All skilled manual workers, and manual workers with responsibility for other people
- **D** All semi-skilled and un-skilled manual workers, apprentices and trainees to skilled workers
- **E** All those entirely dependant on the state long-term, through sickness, unemployment (for a period of longer than six months), old age or other reasons. This group also includes casual workers and those without a regular income.

2. 23 Throughout the report, we also highlight differences between sub-groups of respondents and between the 2006, 2007, 2008 and 2009 results where they are statistically significant.

3. Value for money

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

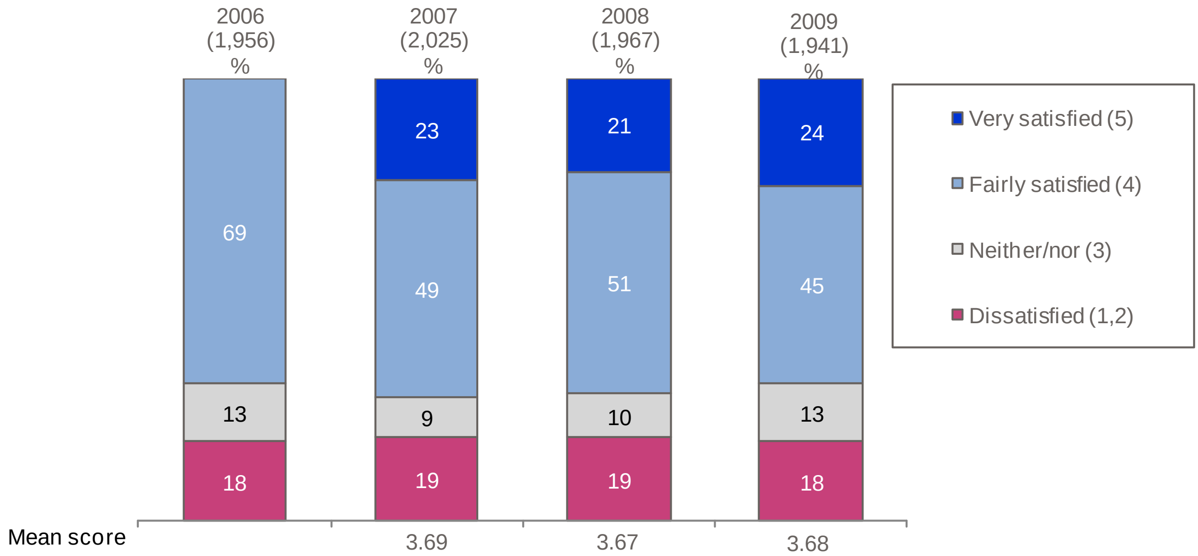
Summary

- Seven in ten respondents (69%) say that they are satisfied with the value for money of their water services and a similar proportion (71%) say that they are satisfied with the value for money of their sewerage services.
- Four in five customers (80%) agree that their water and sewerage bill makes it clear how much needs to be paid and when, with 71% agreeing that it is clear how the final amount of their bill was reached.
- Respondents are more satisfied with value for money from water and sewerage companies than energy suppliers, but the gap is closing with increasing satisfaction with value from energy companies.
- Three in five customers (62%) feel that the charges they pay are fair and three quarters (74%) say that their bills are affordable.

Value for money from water services

3.2 Seven in ten respondents (69%) say that they are satisfied with the value for money of their water services and as shown in the chart below this result is very consistent with previous years.

Chart 3.1: Satisfaction with value for money of water services[1]
(Base: All respondents excluding don't know)



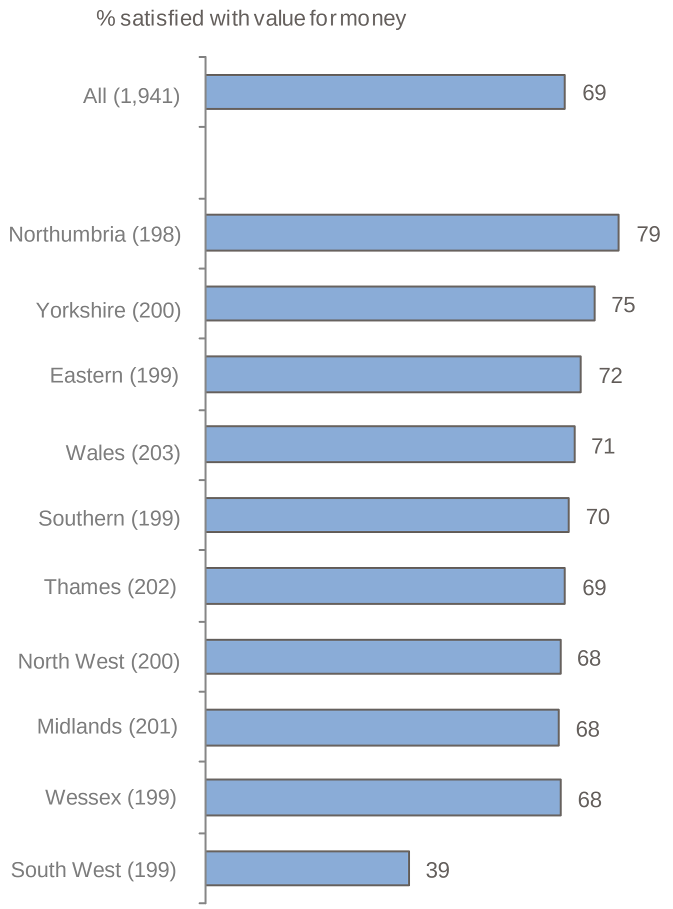
[1] In 2006 a different scale was used. Therefore 2006 results are combined into one overall score for 'satisfied' and are not broken down by 'very' and 'fairly' satisfied

3.3 There is a correlation between satisfaction with water supply and satisfaction with value for money of water services. 73% of those who were overall satisfied with their water supply were also satisfied with value for money of water services, compared with 11% of those who were dissatisfied. Similarly, customers who are satisfied with their sewerage services are also more likely to be satisfied with the value for money (73% compared with 36%).

3.4 Satisfaction with value for money of water services is also linked to age; older respondents are more likely to be satisfied than those in the younger age groups (78% are satisfied among those aged 61+ compared with 65% among those aged 18-60).

3.5 When analysed by region, there are clear differences in perceived value for money from water services. Respondents in the South West are significantly less likely to be satisfied with the value for money from their water services (39% are satisfied, 52% dissatisfied) and this is consistent with previous years' results.

Chart 3.2: Satisfaction with value for money from water services by region
(Base: All respondents excluding don't know)

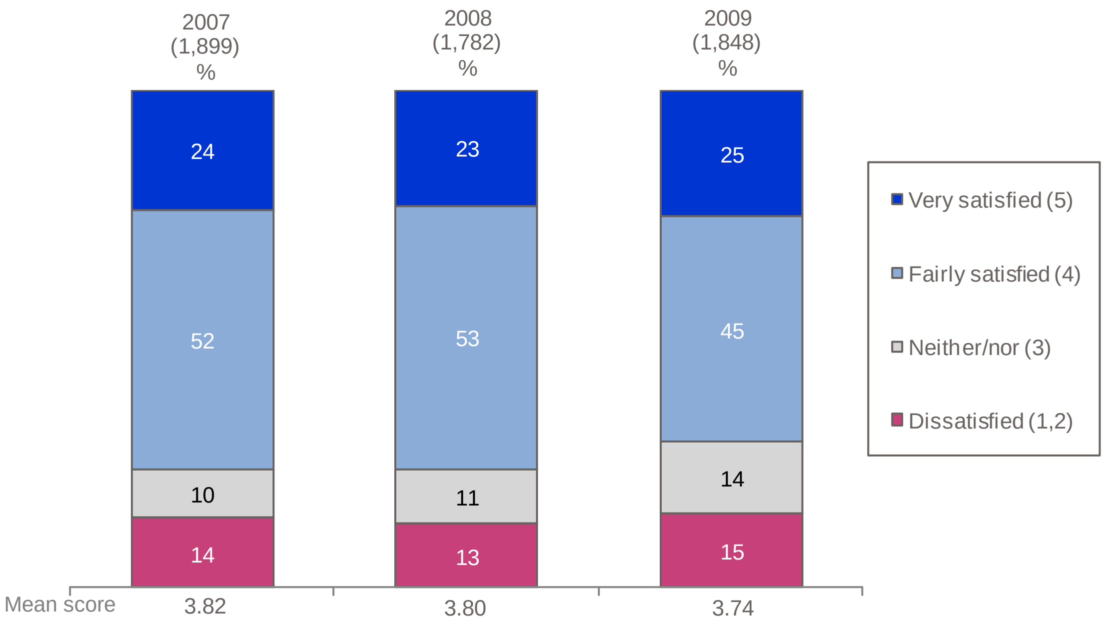


3.6 Dissatisfaction among customers in the South West is a marked feature of the survey and a theme that occurs on other questions. This is likely to be due to the fact that customers in the South West have the highest average bills for water and sewerage services in England and Wales. Consistent with the 2008 results, respondents in Northumbria are the most likely to say that they are satisfied with the value for money from their water services (79% satisfied, 11% dissatisfied).

Value for money from sewerage services

3.7 Satisfaction with value for money from sewerage services is in line with water services with 71% saying that they are satisfied. Although this represents a slight decline in satisfaction since 2008 the difference in mean satisfaction scores between 2008 and 2009 is not statistically significant.

Chart 3.3: Satisfaction with value for money of sewerage services
(Base: All respondents excluding don't know)



3.8 Differences by subgroups follow the same pattern as for satisfaction with value for money of water services:-

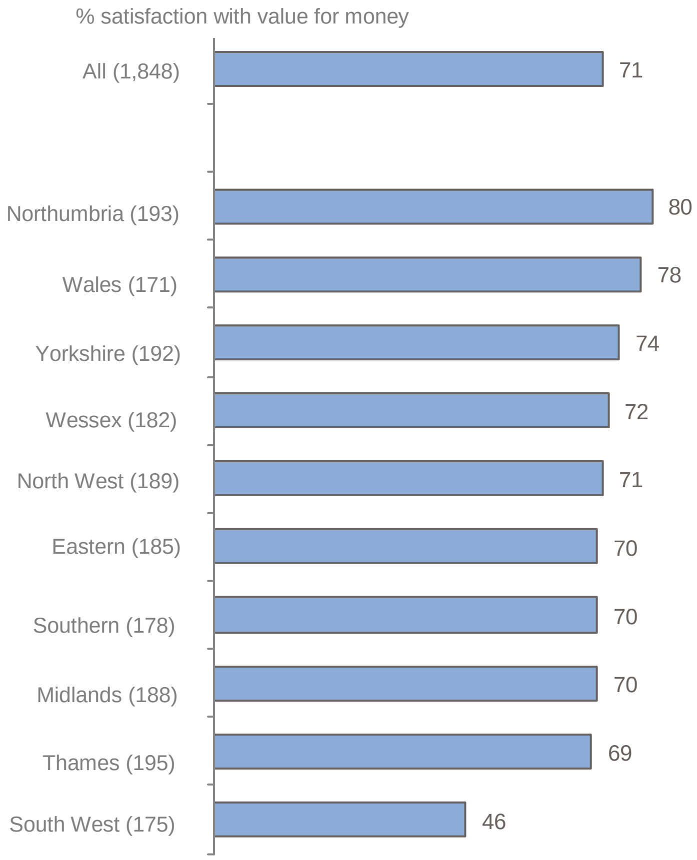
3.8.1 Respondents who are overall satisfied with their sewerage services are also more likely to be satisfied with the value for money.

3.8.2 Those aged 61+ are more likely than younger respondents to be satisfied.

3.9 Regional trends for satisfaction with sewerage services are the same as for water services i.e. respondents in the South West are significantly less likely to be satisfied with the value for money from their sewerage services and respondents in Northumbria are the most likely to be satisfied.

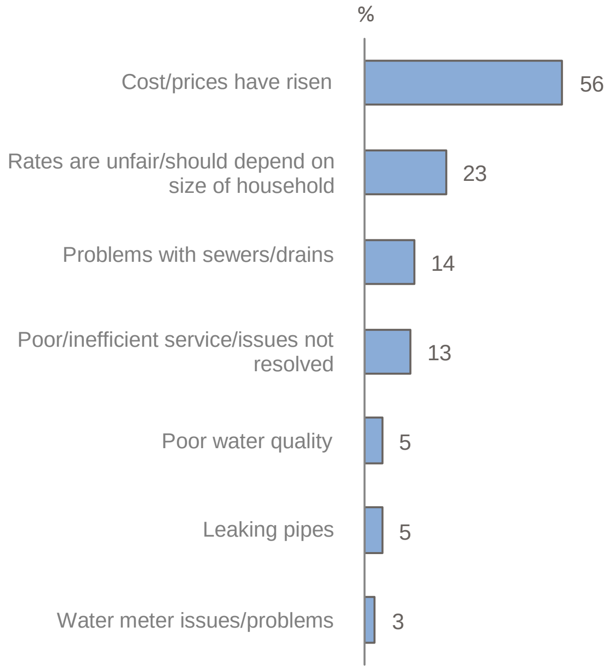
3.10 There was no difference in perceived value for money of water services between Wales and England as a whole; however respondents in Wales are more likely than those in the English regions as a whole to be satisfied with value for money from sewerage services.

Chart 3.4: Satisfaction with value for money from sewerage services by region
(Base: All respondents excluding don't know)



3.11 The main reason that customers are dissatisfied with the value for money from their water and/or sewerage supplier is because of price or rising costs (56%). Nearly a quarter of those dissatisfied with value for money (23%) raise the issue of fairness saying that rates are unfair or suggesting charges should depend on the size of household.

Chart 3.5: Reasons sewerage/water services are not good value for money
(Base: All dissatisfied with value for money of water and/or sewerage supplies – 461)



3.12 Respondents in the South West are the most likely to say that they are dissatisfied due to cost or increases in prices (75%). Those aged 18-34 are also more likely than other age groups to say that cost or prices rising are the reason for their dissatisfaction with value for money (75%).

3.13 Customers in the Thames Water region are the most likely to say that leaking pipes is the cause of their dissatisfaction (11%).

3.14 Overall 23% of those dissatisfied with value for money say that rates are unfair or they should depend on the size of household, but this rises to 40% among one person households. (Nevertheless, ratings for value for money for water/sewerage services were higher among one person households than other types of household). The proportion of those saying that rates are unfair or they should depend on the size of household does not differ by whether customers have a water meter or not.

Clarity of water and sewerage bills

3.15 Four in five customers (80%) agree that their water and sewerage bill makes it clear how much needs to be paid and when, 7% disagree and 13% are neutral/don't know. Slightly fewer (71%) agree that it is clear how the final amount of their bill was reached, with 15% disagreeing and 14% neutral/don't know.

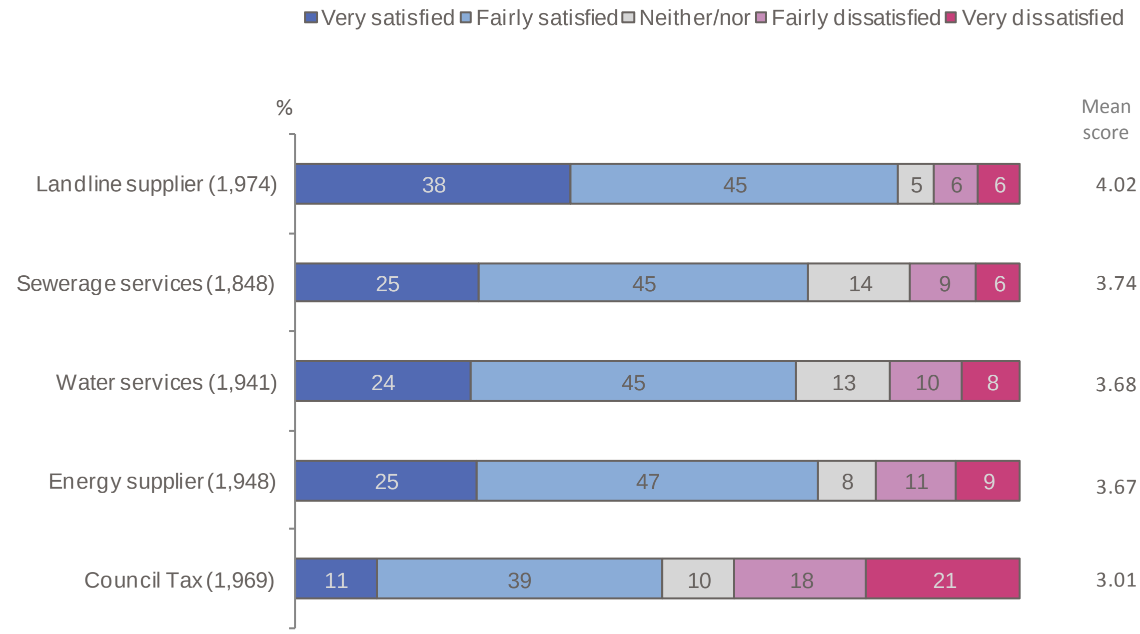
3.16 Those who have water meters are significantly more likely than those without to say that it is clear how the final amount of their bill was reached (75% compared with 68%).

3.17 Younger respondents (aged 18-34) are less likely than older respondents to say that it is clear how the final amount of their bill was reached (61% among those aged 18-34 compared with 73% among those aged 35+).

Comparative value for money from different services

3.18 Respondents are most likely to say that they are satisfied with value for money from landline telephone suppliers (83%), followed by energy companies (72%), sewerage services (71%), and water services (69%). However, as shown in the chart below, mean scores for satisfaction with value for money from water and sewerage companies are slightly higher than energy suppliers. As in 2007 respondents are least likely to say they are satisfied with value for money from their council tax (only 50% say that they are satisfied with the value for money from their council tax).

Chart 3.6: Satisfaction with value for money from various services
(Base: All respondents excluding don't know)

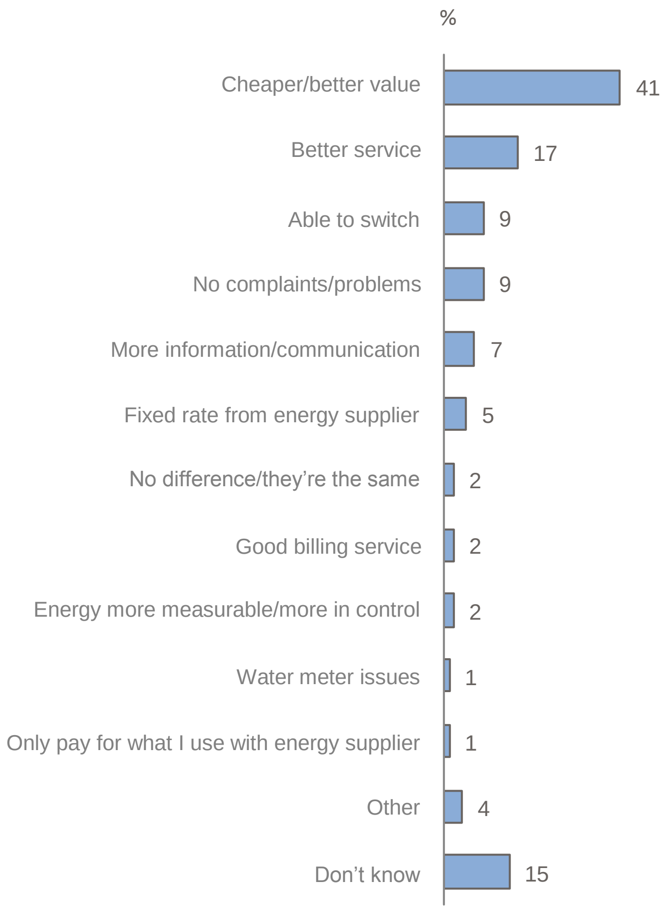


3.19 In 2008 65% said that they were satisfied with the value for money from their energy company (this was following industry wide price rises implemented in Spring 2008). It appears that energy companies have bounced back from this slump with 72% now satisfied with value for money of their energy company. Despite this increase in satisfaction with value for money for energy companies, customers are also more likely to be dissatisfied with the value for money from their energy supplier than their water and sewerage company.

3.20 A quarter of respondents (25%) feel that they get better value for money from their energy supplier than their water supplier (this figure increases to 56% in the South West which has the highest average water and sewerage bill in England and Wales).

3.21 Many of the responses were very general value-related comments when those who consider their energy supplier to offer better value than their water suppliers were asked why they held that view. But some mentioned issues related to quality of service with some simply saying that they get better service from their energy company (17%) and others mentioning that they have had no complaints/problems (9%) and they get more information/communication (7%). One in eleven (9%) say that they get better value because they are able to switch their energy suppliers.

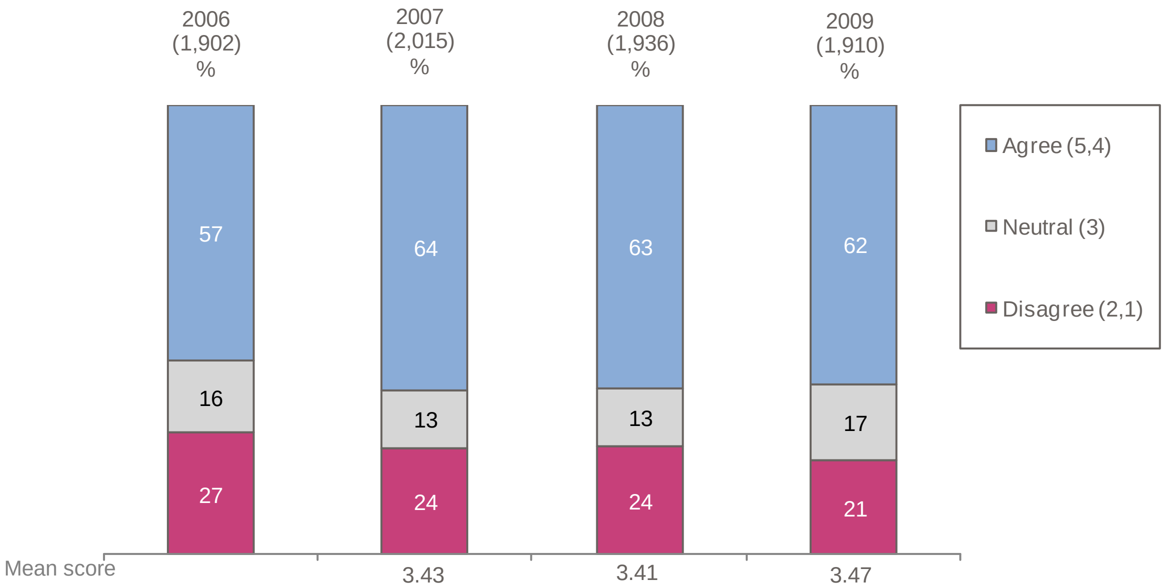
Chart 3.7: Reasons customers think that their energy supplier represents better value for money than their water and/or sewerage service provider
(Base: All who think that they get better value from their energy supplier than water supplier – 520)



Fairness of water and sewerage charges

3.22 Overall, 62% of respondents agree that the water and sewerage charges that they pay are fair, with 21% disagreeing and 17% saying that they neither agree nor disagree. As the following chart illustrates, perceptions of fairness of water charges have been very consistent over the past three years with no statistically significant differences.

Chart 3.8: How much do you agree or disagree that the water and sewerage charges that you pay are fair? (Base: All respondents excluding don't know)



3.23 While there are no significant differences in perceptions of value for money between respondents in different social grades, those in lower social grades are less likely to say that their charges are fair (26% of DE's disagree that their charges are fair compared with 18% of ABC1's).

3.24 Among both DE's and ABC1's, unmetered households are more likely to disagree that the charges they pay are fair (19% of DE's with a water meter compared with 31% who do not have a meter and 14% of ABC1's with a meter compared with 21% of ABC1's who are unmetered disagree that the charges they pay are fair).

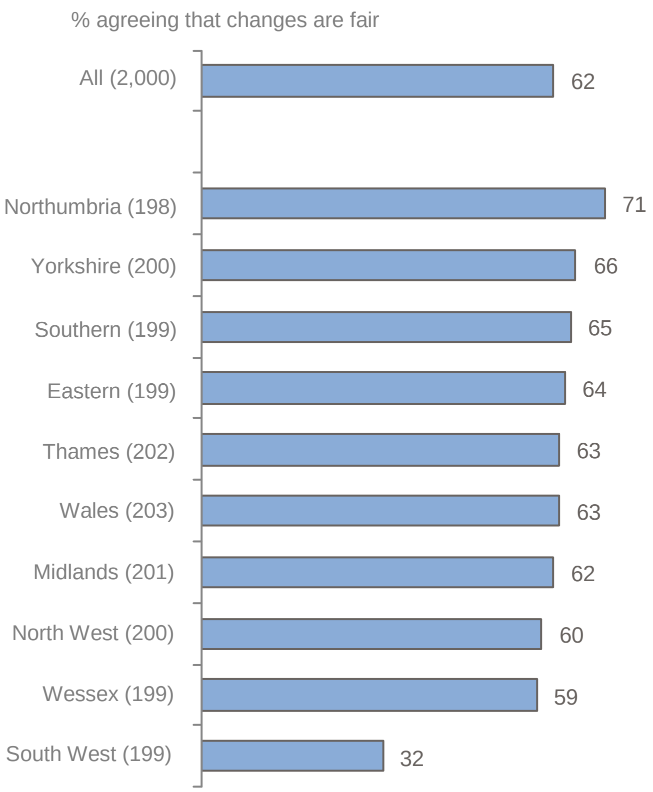
3.25 A number of other subgroups are also more likely to *disagree* that the charges they pay are fair:-

3.25.1 Respondents with a disability or long-term health condition are more likely to disagree that the charges they pay are fair (31% among those with a disability or long-term health condition and 27% among those with someone else in the household with a disability compared with 19% of others).

3.25.2 Those aware of the Ofwat price review are a little more likely than the unaware to disagree that the charges they pay are fair (24% compared with 20%).

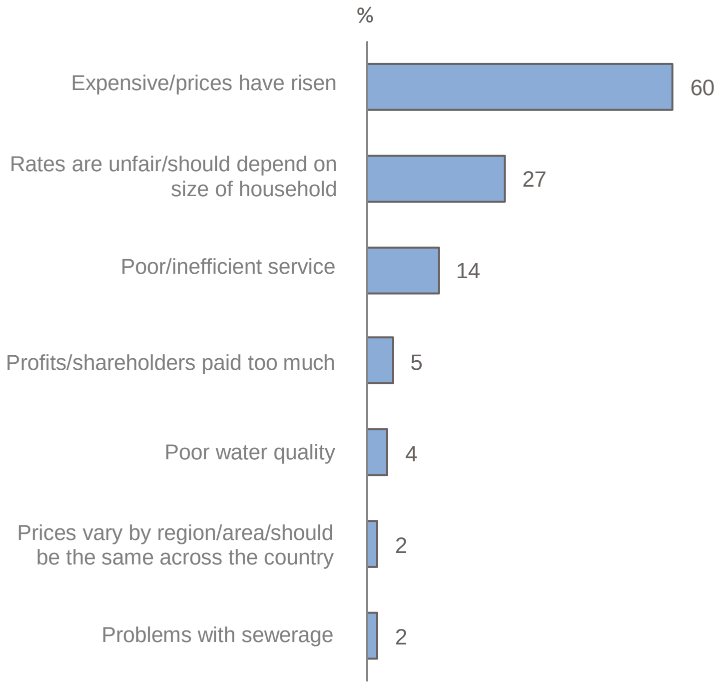
3.26 As with value for money, respondents in the South West, which has the highest average water and sewerage bill in England and Wales, are significantly less likely to agree that the charges they pay are fair (32% agree). Those in the Northumbria region are most likely to agree that the charges they pay are fair (71%).

Chart 3.9: Respondents agreeing that the charges they pay are fair by region
(Base: All respondents excluding don't know)



3.27 As the following chart illustrates, the majority of those who think that their water and sewerage charges are unfair tend to link this perception to cost rather than service (60% say it is because expensive/prices have risen). Over a quarter (27%) say it is because rates are unfair and/or should depend on the size of household.

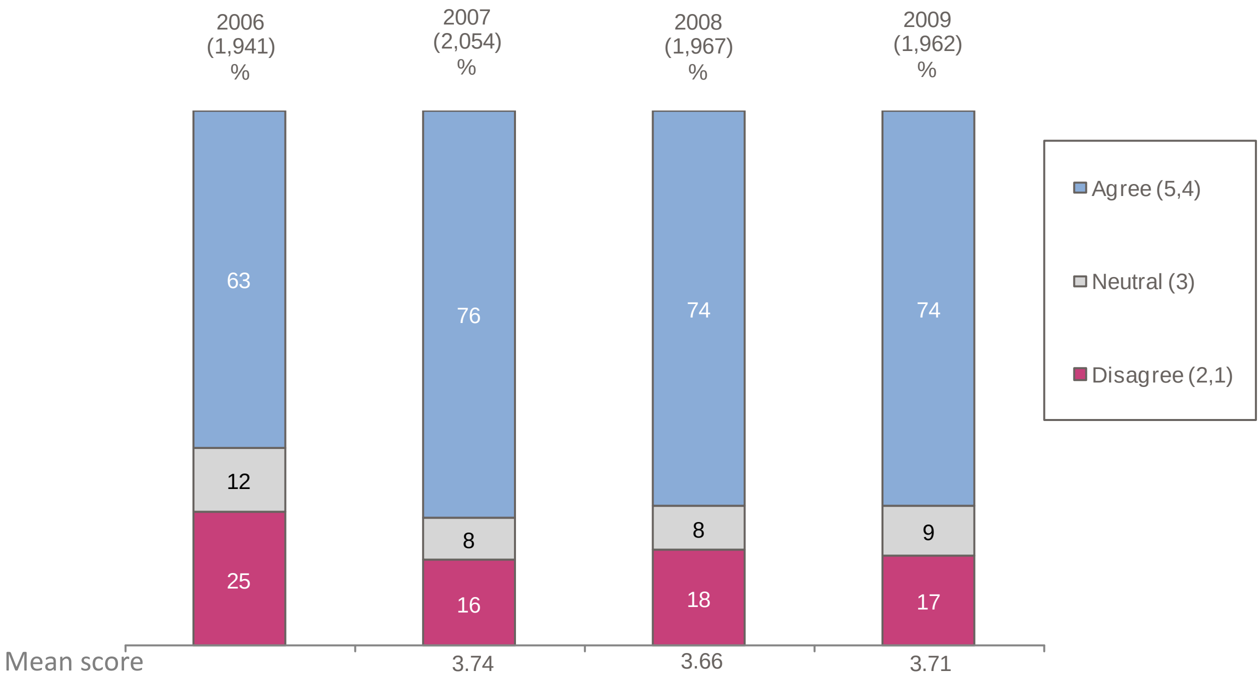
Chart 3.10: Reasons water and sewerage charges are unfair
(Base: All disagreeing that water and sewerage charges are fair – 473)



Affordability of water and sewerage charges

3.28 Whilst 62% agree that their bills are fair, a much higher proportion say that their bills are affordable (74%) and this is consistent with previous years' findings.

Chart 3.11: How much do you agree or disagree that the water and sewerage charges that you pay are affordable to you?
(Base: All respondents excluding don't know)



3.29 In line with findings for value for money and fairness of charges, respondents in the South West are the least likely to agree that their bills are affordable (50%).

3.30 Respondents of lower social grade are less likely than more affluent respondents to agree that their charges are affordable to them (64% of DE's compared with 81% of AB's agree).

3.31 Social renters and those with a disability or long-term health condition are also less likely to agree that the charges that they pay are affordable (62% and 60% respectively agree that the charges they pay are affordable to them).

3.32 Overall 73% of respondents say that they would be likely to contact their water company if they were worried about paying their bill (slightly lower than the 78% in 2008), but there are differences by subgroup:-

3.32.1 Respondents in the English regions are more likely than those in Wales to say that they would contact their company if worried about paying their bill (73% compared with 65%).

3.32.2 Encouragingly, single parents and those who may potentially be eligible for WaterSure Tariff are more likely than others to say that they would contact their water company if worried about paying bills (82% and 94% respectively).

3.32.3 However, those aged 75+ are significantly less likely to say that they would contact their company (56%).

3.32.4 Also, respondents from black and minority ethnic groups (BME's) are less likely to say that they would contact their water company if worried about paying their bill (62% of BME's respondents compared with 74% of other respondents).

3.32.5 Customers who were satisfied with their previous contact with their water company were more likely to be prepared to contact them if they were worried about paying their bill (81% of those satisfied with previous contact compared with 65% of those dissatisfied). This highlights the importance of companies handling customer contact well. If a customer has a disappointing experience they may be reluctant to contact the company when it is in both their and the company's interest that they should do so.

3.33 In 2008 a new question was added to the survey to examine customers' views on the relative importance of bills being affordable versus the importance of water and sewerage companies conducting their business ethically. Results are in line with last year with 11% saying that their bill being affordable is most important to them, compared with 7% who say that their water and/or sewerage company conducting their business ethically is most important. The majority of respondents (80%) say that they are both equally important to them.

3.34 ABC1's are more likely than those in lower social grades to say that their company conducting its business ethnically is more important.

4. Consumer rights and responsibilities

4.1 In this section we explore customers' views on a number of issues relating to the rights and responsibilities of water consumers. This includes the take-up of water meters, awareness of the option to have a water meter fitted free of charge, awareness and take-up of special tariffs, awareness of consumer rights and issues relating to contacting the water companies.

Summary

- One in eleven respondents (9%) are aware of the WaterSure/Welsh Water Assist Tariff. This has increased over the past year from 7% aware in 2008.
- A quarter of respondents (24%) say that they are aware of their water company's services available for elderly and/or disabled customers.
- Two in five respondents (41%) have a water meter and this is significantly higher among older respondents (who are also more likely to ask to have a water meter fitted).
- There is a significant minority (2%) who may be eligible for WaterSure/Welsh Water Assist but are not aware.
- Two in five (41%) claim to be aware that under certain circumstances they may be entitled to compensation from their water company.
- Overall 18% of respondents say that they have contacted their water company to make an enquiry in the past 12 months. Taking everything into account, 77% of these respondents say that they are satisfied with the contact with their water company.

WaterSure/Welsh Water Assist Tariff

4.2 One in eleven respondents (9%) are aware of the WaterSure/Welsh Water Assist Tariff. This has increased from 7% in 2008.

4.3 However, the majority of respondents in England and Wales (91%) are still not aware of availability of these tariffs. This includes 74% who say that they do not need to be on the tariff, 13% who say that they would like to know more and 4% who are unsure.

Table 4.1: Awareness of WaterSure/Welsh Water Assist tariff
(Base: All respondents)

	2007[2] (2088) %	2008 (2000) %	2009 (2000) %
AWARE	**12**	**7**	**9**
Subscribed	1	1	2
Aware but no need to subscribe	10	6	7
NOT AWARE	**88**	**93**	**91**
No, but would like to know more	11	14	13
No, but do not need it	76	77	74

4.4 There are a number of significant differences in the characteristics of those who would like to know more about the tariff:-

4.4.1. Respondents from lower social grades are more likely than others to say that they would like to know more (19% of DE's compared with 8% of AB's).

4.4.2. Consistent with social grade differences, respondents who are in social rented accommodation are more likely than owner occupiers to say that they would like to know more (26% of social renters compared with 11% of owner occupiers).

4.4.3. Lone parents are also more likely to say that they would want to know more (27% of lone parents compared with 12% of other households).

4.4.4. Respondents with a disability or long-term health condition are also more likely to say that they would like to know more about the tariff (17% of respondents with a disability or long-term health condition compared with 12% of those who do not).

[2] In 2007 the tariff was referred to as the 'Vulnerable Groups Tariff'

4.5 Based on responses to series of questions about personal circumstances[3] 2% of all respondents in England and Wales may be eligible for the WaterSure/Welsh Water Assist tariff but not currently signed up. The majority of these customers (84%) have not heard of the tariffs, including 49% who say that they do not need it and 34% who say that they would like to know more.

Services for elderly and/or disabled consumers

4.6 Respondents were asked "Are you aware of your water company's services for elderly and/or disabled customers? This includes services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure company representatives are genuine, or notification of customers on dialysis who need constant availability of supply?"

4.7 A quarter of respondents (24%) say that they are aware of the services available for elderly and/or disabled customers. This is in line with 2008 results when 25% said that they were aware of these services. Included in the 76% unaware are 11% of all respondents who would like to know more.

Table 4.2: Awareness of services for elderly and/or disabled consumers
(Base: All respondents)

	2007 (2088) %	2008 (2000) %	2009 (2000) %
AWARE	**29**	**25**	**24**
Subscribed	1	1	1
Aware but no need to subscribe	28	24	24
NOT AWARE	**71**	**75**	**76**
No, but would like to know more	10	10	11
No, but do not need it	61	65	64

4.8 Awareness among those aged 75+ has fallen over the last year from 37% in 2008 to 24% in 2009.

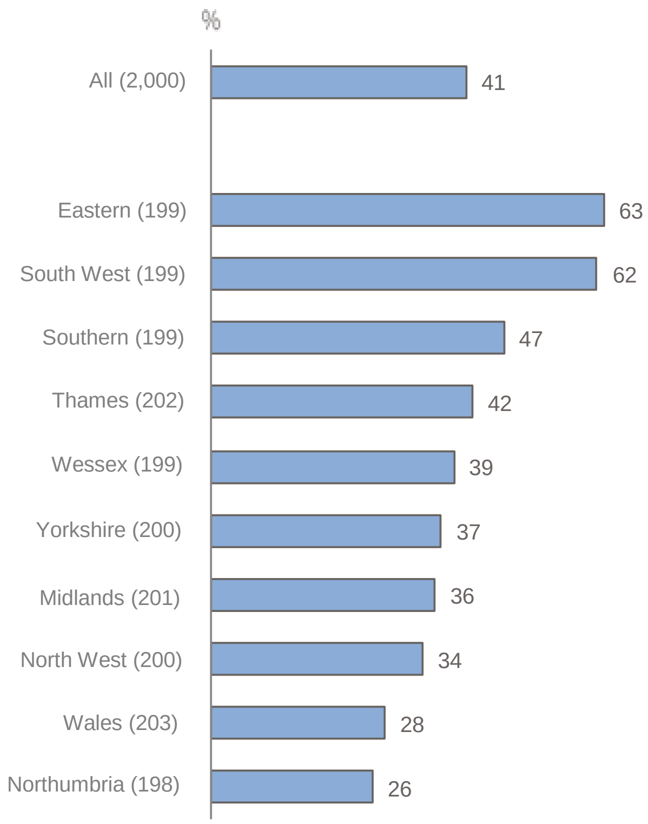
4.9 Elderly customers are the most likely to say that they would like to know more about these services (21% of those 61+, compared with 6% of those aged 60 and under who would like to know more).

[3] This figure is based on ALL respondents surveyed. Potential eligibility for WaterSure derived from responses to Q65 and Q68-71 in the questionnaire (see appendix). Only metered customers in English regions may be eligible. In Wales both metered and unmetered customers may be eligible.

Incidence of water meters

4.10 Overall 41% of respondents say that they have a water meter fitted, and as in previous years, penetration of water meters continues to vary greatly by region with those in Eastern and South West regions the most likely and those in Wales and Northumbria regions the least likely to have a water meter fitted. Interestingly, it tends to be in areas of higher satisfaction with value for money that water meter penetration is lower.

Chart 4.3: Proportion of households with a water meter fitted
(Base: All respondents)



4.11 Those one might expect to have low water consumption are more likely to have meters than larger families. Over half (52%) of one person households have a meter fitted compared with 44% of two adult households, 33% of one parent families, and 30% of two parent families.

4.12 Older respondents are more likely to have a water meter than those who are younger. 66% of those aged 75+ and 48% of 61-75 year olds have a meter fitted, compared with 38% of under 60's. This is linked to household size.

4.13 Also, respondents in rural areas are more likely than those in urban areas to have a water meter fitted (47% compared with 37%), and White British respondents are more likely than BME respondents to have a water meter fitted (42% compared with 25%).

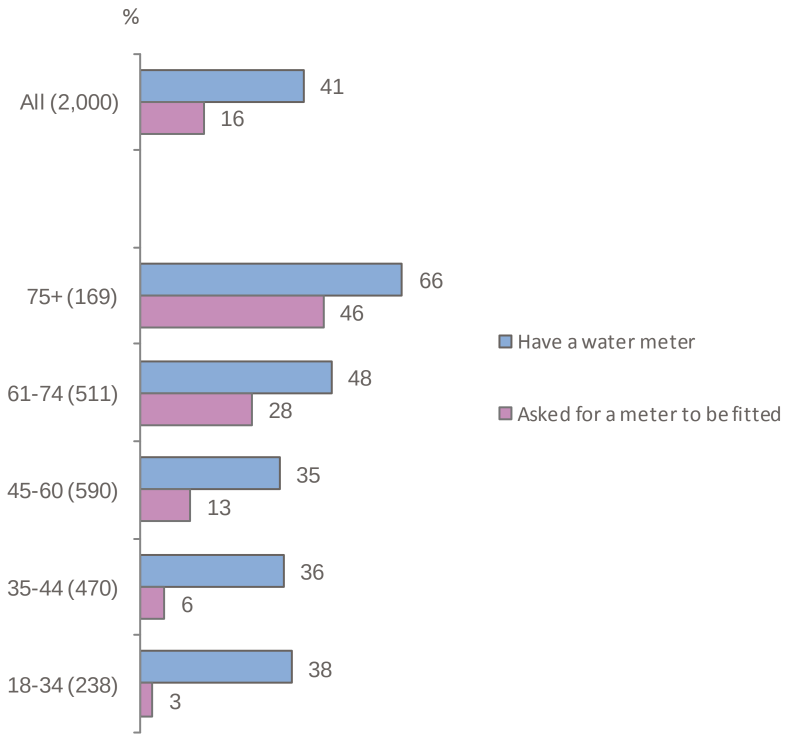
Requesting a water meter

4.14 Of the 41% of households who have a water meter just over half (52%) say that it was already installed when they moved into their home, 38% asked for it to be fitted and 8% had to have a meter fitted.

4.15 Those living in single person households, people from lower social grades and those with disabilities or long-term health conditions were much more likely to have asked for a meter to be fitted than those living in multi-person households.

4.16 As the following chart illustrates, older respondents are also much more likely than younger respondents to have asked for a water meter to be fitted.

Chart 4.4: Proportion of all customers with water meters by age
(Base: All respondents)



4.17 Among respondents who did not have a water meter 56% were aware that they could have one fitted free of charge if they wanted. As in 2008, of the total sample, 25% did not have a water meter AND were NOT aware they could have one fitted free of charge.

4.18 If a customer requests to have a water meter fitted, they have 12 months to decide whether or not they want to keep it. If they don't, they can go back to the original water rate charge for the property at no cost[4]. Among unmetered customers 23% of those surveyed (half of those aware that they could have a new meter fitted free of charge) claimed to be aware that they could have it on a 12 month trial period.

[4] This is the case except in Veolia Water South East (formerly Folkestone & Dover Water) where a compulsory metering programme is underway for all households.

Water meter users' attitudes and behaviour

4.19 Throughout the report differences in attitudes and behaviour of metered and unmetered households are highlighted and it is clear that those who have a water meter fitted tend to be more engaged with issues affecting their water and sewerage services. Below is a summary of some of the key differences between metered and unmetered respondents. Customers with water meters fitted are:-

- more likely to say that it is clear how their final bill is reached
- less likely to be dissatisfied with value for money
- less likely to disagree water charges are fair
- more likely to be aware of WaterSure
- more likely to be aware of compensation if certain service standards are not met
- more likely to say that they would read information provided by their water/sewerage company
- more likely to have contacted their water/sewerage company
- more likely to say that they have taken actions to reduce their use of water such as having a water butt in the garden or reusing water
- more likely to claim awareness of the price review.

Some differences, such as greater contact with their water company, appear to be attributed to having a water meter. However, it is important to note that some of these differences are not necessarily as a result of having a water meter fitted. For example, it may be that customers have a water meter fitted because they are concerned about their use of water or are already more aware of what services are available to them rather than having a water meter fitted making them more aware of these issues. Older bill payers are also more likely to have a water meter than younger bill payers and so age is another factor which has a bearing on the differences between metered and unmetered respondents.

Service standards and compensation

4.20 There are a number of customer service standards which all water companies must comply with. These are set out to protect the rights of customers, and if a water or sewerage company fails to meet these customer service standards for reasons within their control, customers may be entitled to compensation.

4.21 Two in five respondents (41%) state they are aware that under certain circumstances they may be entitled to compensation. This is in line with previous results - 39% in 2006, 44% in 2007, and 40% in 2008.

4.22 Respondents in the South West are most likely to be aware that they may be entitled to compensation (53%).

4.23 There are a number of other significant differences by sub-groups and it tends to be the potentially vulnerable customers who are less aware:-

4.23.1. Younger respondents (aged 18-34) are the least likely to be aware (25%).

4.23.2. Respondents of a higher social grade are more likely than others to say that they are aware (47% of AB's compared with 35% of DE's).

4.23.3. Consistent with the social grade differences, owner occupiers are more likely than renters to be aware (44% of owner occupiers compared with 30% of private renters and 31% of social renters).

4.23.4. Single parents are less likely than others to be aware (30% of single parents compared with 42% of all other households).

4.23.5. BME respondents are significantly less likely than others to be aware (29% compared with 42%).

Information from water companies

4.24 Seven in ten customers (69%) say that they are likely to read information sent to them by their water company, but there are 30% who say that they would be unlikely to read anything sent to them by their water company (22% not very likely and 8% not at all likely). Younger respondents and those who do not have a water meter were the most likely to say that they would not read information provided by their company.

Contacting water companies

4.25 Overall 18% of respondents say that they have contacted their water company to make an enquiry in the past 12 months (this is in line with 2008 – also 18%) with respondents in the South West more likely than other regions to say that they have made an enquiry (28%).

4.26 Younger respondents are the most likely to say that they have made an enquiry in the last 12 months (25% of 18-34 year olds compared with 20% of those 35-44, 15% of 45-60 year olds, 17% of 61-74 year olds, and 9% of respondents aged 75+).

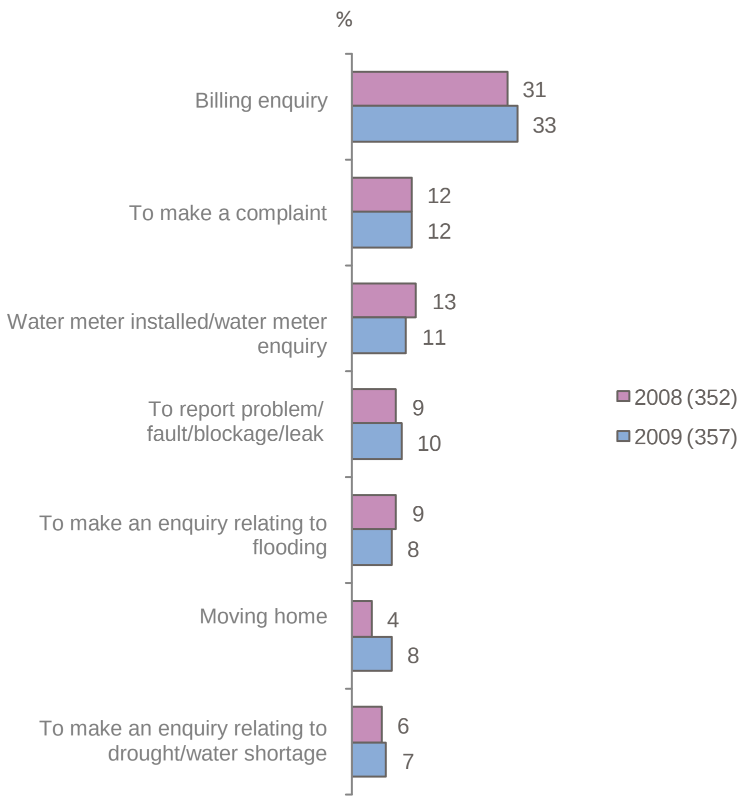
4.27 Younger respondents are more likely than older respondents to say that their contact was in relation to moving home. However, even with the property market starting to pick up in 2009, this still accounted for only a small proportion of enquiries.

4.28 Respondents with a water meter are more likely than those without to say that they have made an enquiry in the past 12 months (22% compared with 14%).

4.29 The reasons for making contact are very similar to those mentioned in 2008 with the most common reason being a billing enquiry (mentioned by 33% of those making contact).

Chart 4.5: Reasons for making contact

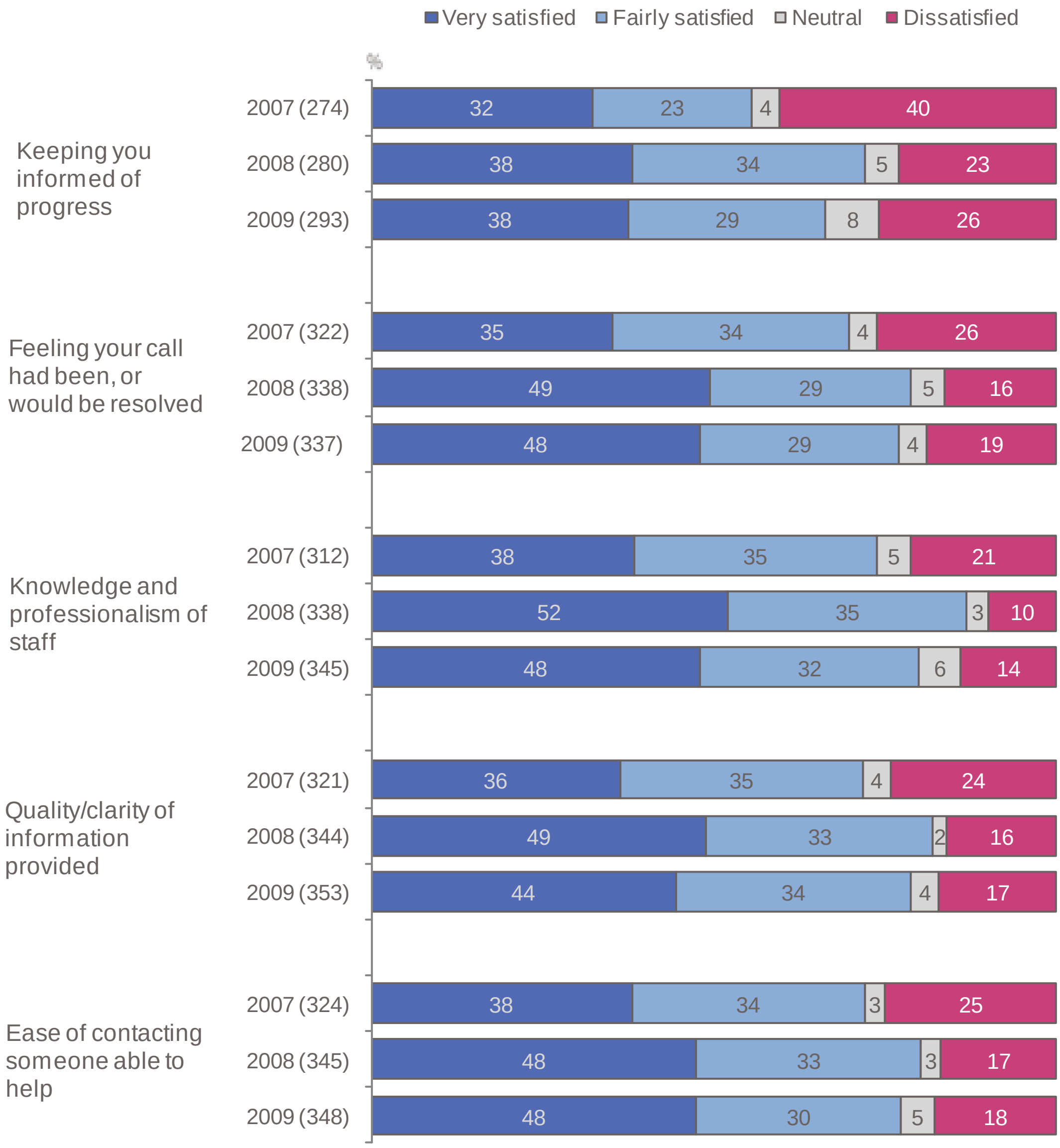
(Base: All making contact)



4.30 The following chart shows customers' satisfaction with various aspects of contact with their water/sewerage company. The element of service respondents are most likely to be satisfied with is the knowledge and professionalism of staff (80% satisfied) and the element of contact customers are least likely to say that they are satisfied with is being kept informed of progress (67% satisfied).

4.31 Satisfaction with contact increased between 2007 and 2008 but has declined slightly over the past year. However, the overall picture from 2007-2009 is relatively consistent.

Chart 4.6: Satisfaction with contact
(Base: All respondents contacting their water company excluding DK/not applicable)



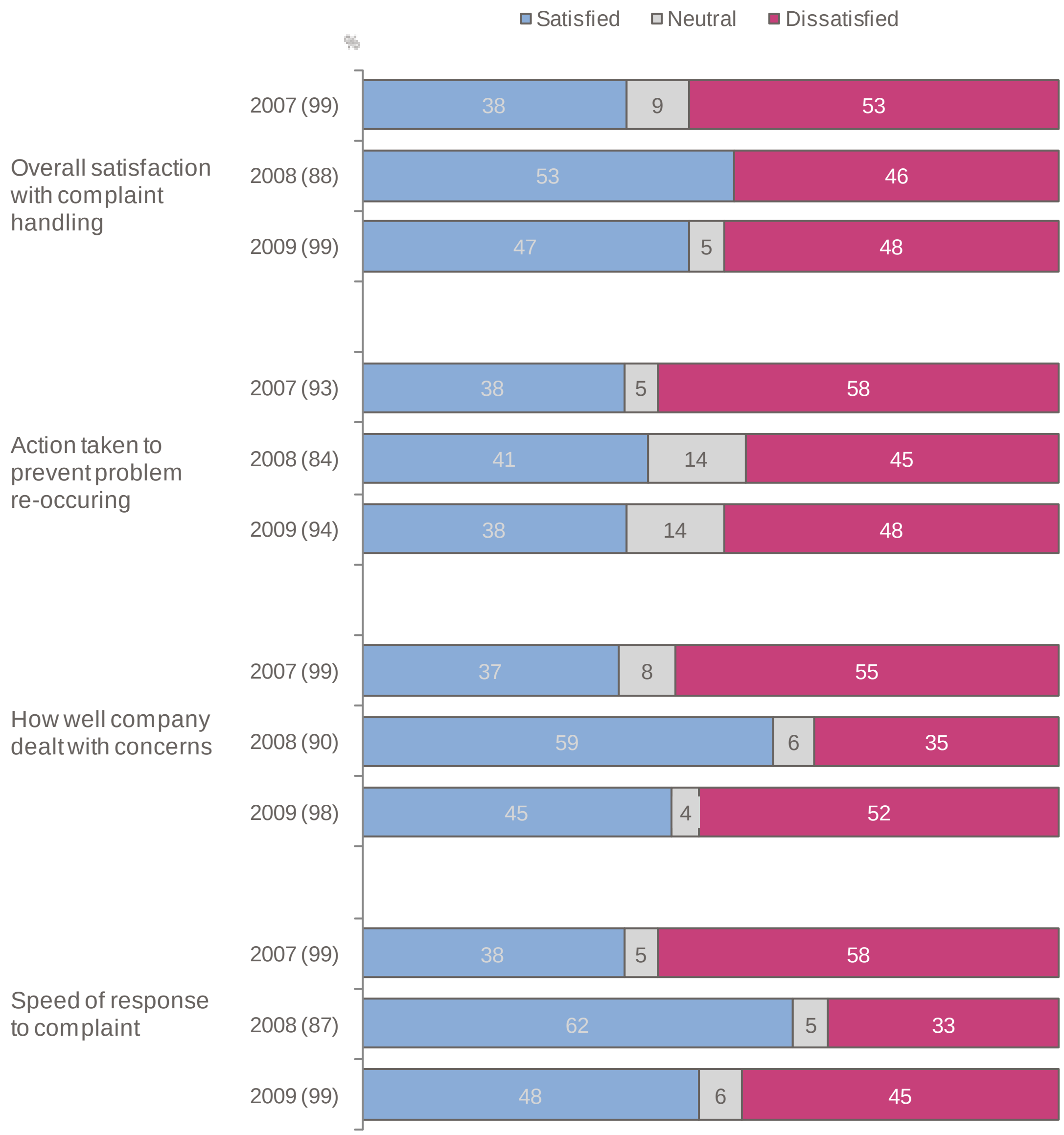
Making a complaint

4.32 When prompted, a total of 5% of respondents said that they had made a complaint to their water or sewerage company in the last 12 months (this compares to 5% in 2007 and 4% in 2008), and this still represents a sizeable number of complaints.

4.33 The element of complaint handling respondents are least likely to be satisfied with is taking action to prevent problems re-occurring (38% satisfied).

4.34 As with satisfaction with contact, satisfaction with various aspects of the complaint handling has fallen slightly over the past year although these are relatively consistent when looked at over the three year period from 2007 to 2009.

Chart 4.7: Satisfaction with complaint handling
(Base: All respondents making a complaint excluding DK/not applicable)



4.35 All those who were not satisfied with the way their complaint was handled were asked what they would have changed about this. The main changes that customers would have liked were:-

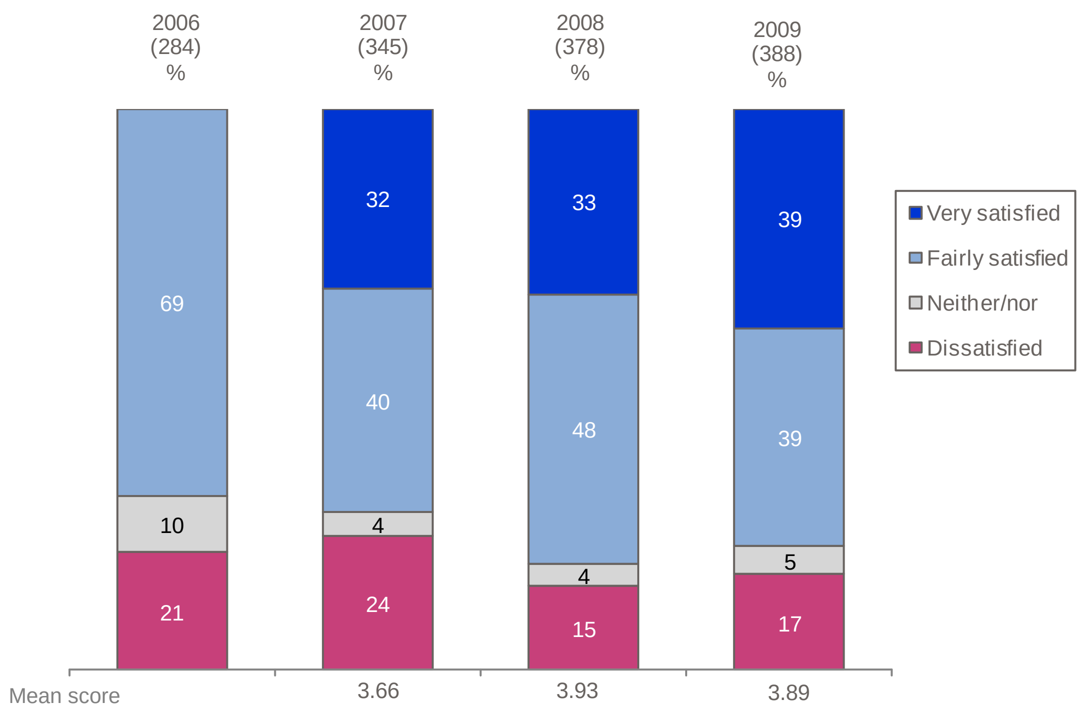
- more information/communication – (mentioned by 26% of dissatisfied complainants)
- issue should have been dealt with/resolved – 22%
- staff more understanding/sympathetic – 14%
- staff more knowledgeable/experienced – 13%
- quicker service – 12%
- staff should listen/seem more interested – 11%

Overall satisfaction with contact

4.36 Including those who had made complaints, 18% had contacted their water company in the last twelve months. Taking everything into account, 77% of these respondents say that they are satisfied with the contact with their water company (81% in 2008 and 71% in 2007).

Chart 4.8: Overall satisfaction with contact

(Base: All respondents contacting their water company excluding DK/not applicable)



4.37 As we have seen over the past four years those who are satisfied with the value for money from their water and sewerage supply are significantly more likely to say that they are satisfied with the contact with their water company than those dissatisfied with value (89% compared with 51% in 2009). This suggests people's experiences of contact with their water company influences their value for money perceptions and vice versa.

4.38 The main causes of dissatisfaction with overall contact were poor/unsatisfactory service and issues not dealt with (36%) followed by a lack of or poor information (17%). 15% said that it was because their bills were too expensive or prices had risen.

4.39 The benchmark contact satisfaction study conducted by FDS for Ofwat in 2009 suggested water/sewerage companies were slightly better than telecoms or energy companies at handling customer contact.

4.40 Similarly FDS's own 2008 CompariSat® study suggested the following levels of satisfaction with recent contact:-

Table 4.9: Levels of satisfaction with recent contacts

	Satisfied	Dissatisfied
Banks	85%	8%
Credit Card providers	80%	12%
Energy companies	64%	19%
Fixed-line telecom providers	63%	21%

4.41 While the methodology was not identical to the CCWater study we feel this still gives a good indication of the performance of water companies (78% satisfied, 17% dissatisfied) handling of contact relative to other types of organisation people deal with.

5. Water on tap

5.1 This section explores customers' views on a number of issues relating to their water service including their overall satisfaction with their water supply, tap water versus bottled water, attitudes towards drinking water fountains and efforts to encourage consumers not to waste water.

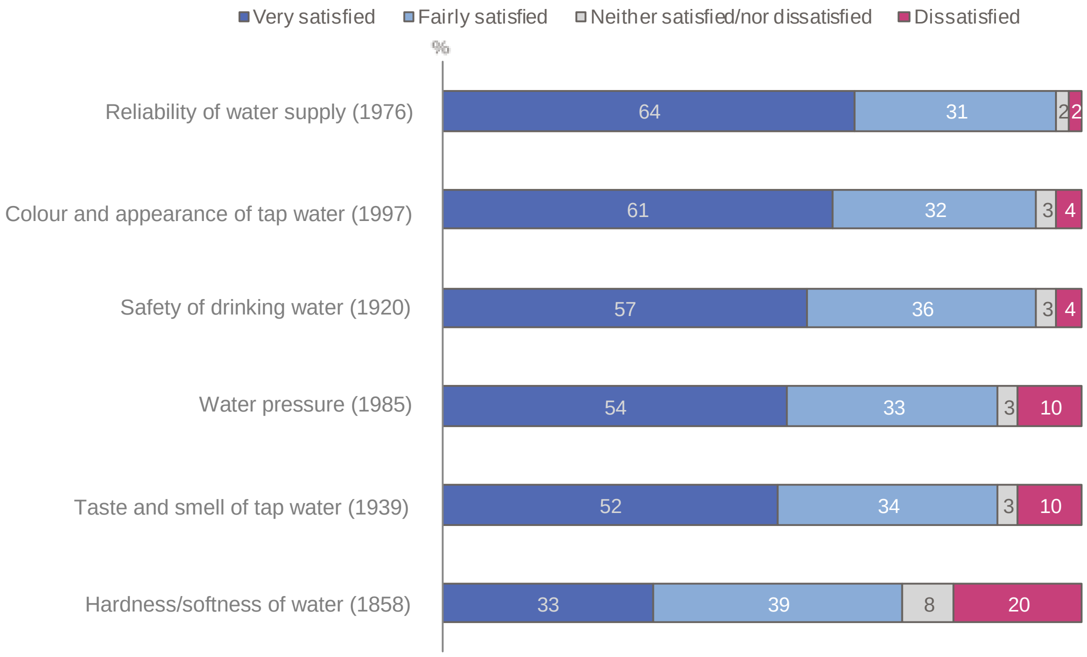
Summary

- There are high levels of satisfaction for all aspects of water supply, with customers most satisfied with the reliability of their water supply (96%) and least satisfied with the hardness/softness of their water (72%).
- Four in five adults (81%) think that tap water is at least as good for them as bottled water.
- Over half of respondents (54%) say that they would be likely to use public drinking water fountains if they were available.
    - People interested in using drinking water fountains are more likely to say that they would fill a bottle rather than drink directly from a water fountain (81% compared with 61%).
    - For those who would be unlikely to use them the main concern is hygiene/cleanliness.
- Three in five respondents (60%) say they have seen campaigns to use water wisely over the past year.
- Seven in ten (70%) say that they have taken specific actions to reduce their use of water over the past year.

Satisfaction with water supply

5.2 There are high levels of satisfaction for all aspects of water supply, with very few customers dissatisfied with their water supply. Customers are most satisfied with the reliability of their water supply (96%), and least satisfied with the hardness/softness of their water (72%).

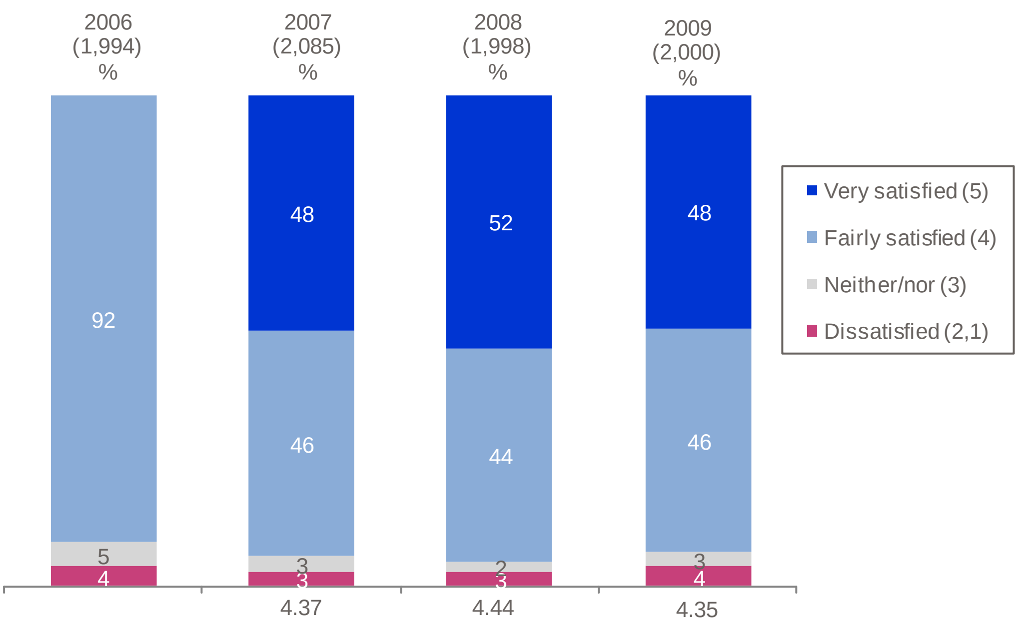
Chart 5.1: Satisfaction with various aspects of water supply
(Base: All respondents excluding DK/not applicable)



5.3 Respondents in Wales are significantly more likely than respondents in the English regions to be satisfied with the taste and smell of tap water (94% compared with 86%).

5.4 Overall, 93% of respondents say that they are satisfied with their water supply and as the following chart shows, satisfaction with water supply is slightly lower than in 2008 and is now at a similar level to 2007 findings.

Chart 5.2: Overall satisfaction with water supply[5]
(Base: All respondents excluding DK/not applicable)



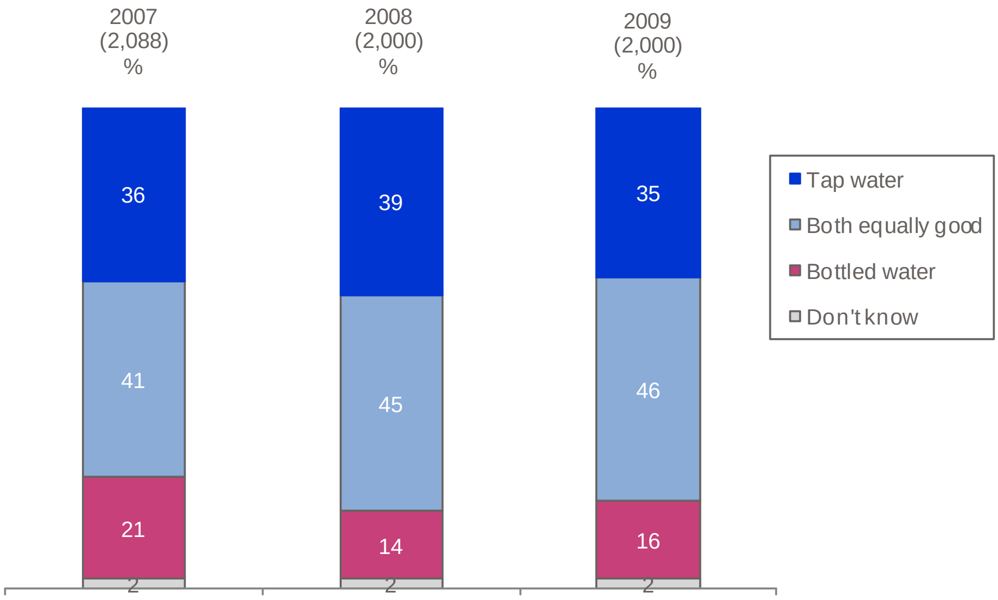
5.5 Those who are satisfied with the value for money from their water and sewerage company are significantly more likely to say that they are satisfied with their water supply than those dissatisfied with value (98% compared with 73%). This again illustrates the link between perceptions of value for money and other aspects of water/sewerage services.

[5] In 2006 a different scale was used. Therefore 2006 results are combined into one overall score for 'satisfied' and are not broken down by 'very' and 'fairly' satisfied

Tap water vs. Bottled water

5.6 The majority of adults (82%) believe tap water is at least as good for them as bottled water and the proportion saying that bottled water is better for them is consistent with 2008 results.

Chart 5.3: Which is better for you?
(Base: All respondents)



5.7 There is a clear link between age and opinions on bottled versus tap water with younger respondents more likely to favour bottled water, but even so, only 25% of 18-34 year olds think bottled water is better. Older respondents are likely to think that tap water is better for them and only 12% of those aged 75+ consider bottled water to be better for them. There are also a number of other interesting subgroup differences:-

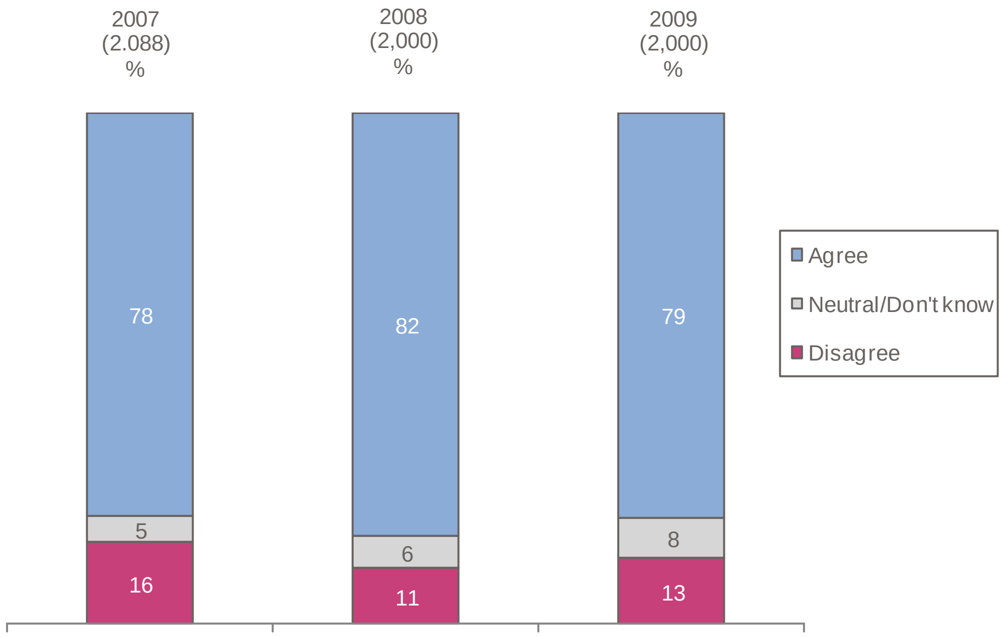
5.7.1 Respondents from BME groups are significantly more likely than white adults to say that bottled water is better for them (32% compared with 15%).

5.7.2 Respondents from lower social grades are more likely than more affluent respondents to say that bottled water is better for them (19% of DE's compared with 13% of AB's).

5.7.3 Those who are overall dissatisfied with their water supply are more likely than those who are satisfied to say that they think bottled water is better for them (33% compared with 15%).

5.8 Four in five respondents (79%) agree that they usually drink tap rather than bottled water and this is in line with previous years' results.

Chart 5.4: Agreement with the statement "I usually drink tap rather than bottled water"
(Base: All respondents)



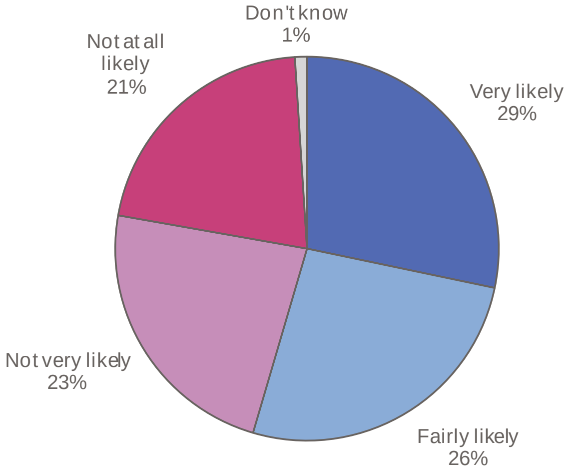
5.9 Differences by subgroup are similar to those for whether bottled or tap water is better for you, with younger respondents, BME groups and those who are overall dissatisfied with their water supply less likely to agree that they usually drink tap water.

5.10 Respondents in Wales and Yorkshire are the most likely to agree that they usually drink tap water rather than bottled (86% and 84% respectively) and these are also the two areas with the highest scores for satisfaction with the taste and smell of water.

Public drinking fountains

5.11 A number of additional questions were added to the 2009 survey to examine attitudes towards and likely use of taps and drinking water fountains in public spaces. Over half of respondents (54%) say that they would be likely to use them, with one in five (21%) saying that they would be not at all likely to use them.

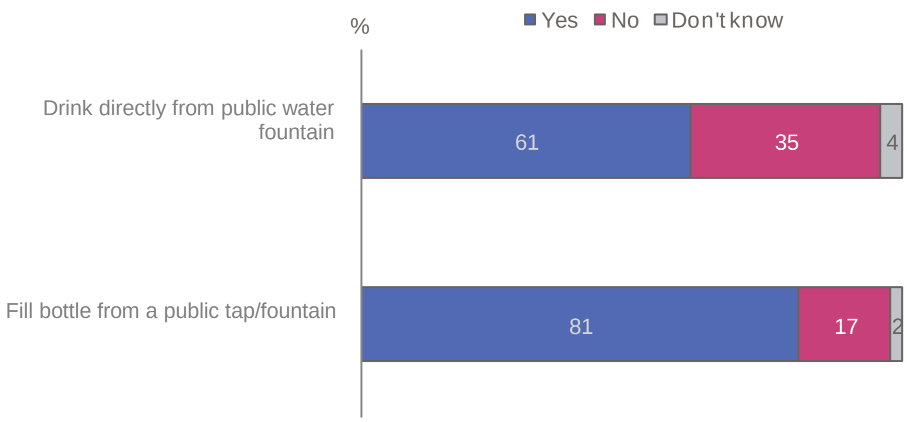
Chart 5.5: Proportions likely to use taps or drinking water fountains if widely and freely available in public spaces (Base: All respondents)



5.12 There were some regional differences with respondents in the Wessex region the most likely to say that they would use them (63%) and respondents in the South West the least likely (46%). Those from higher social grades were more likely than others to say that they would use them (61% of AB's compared with 51% of DE's).

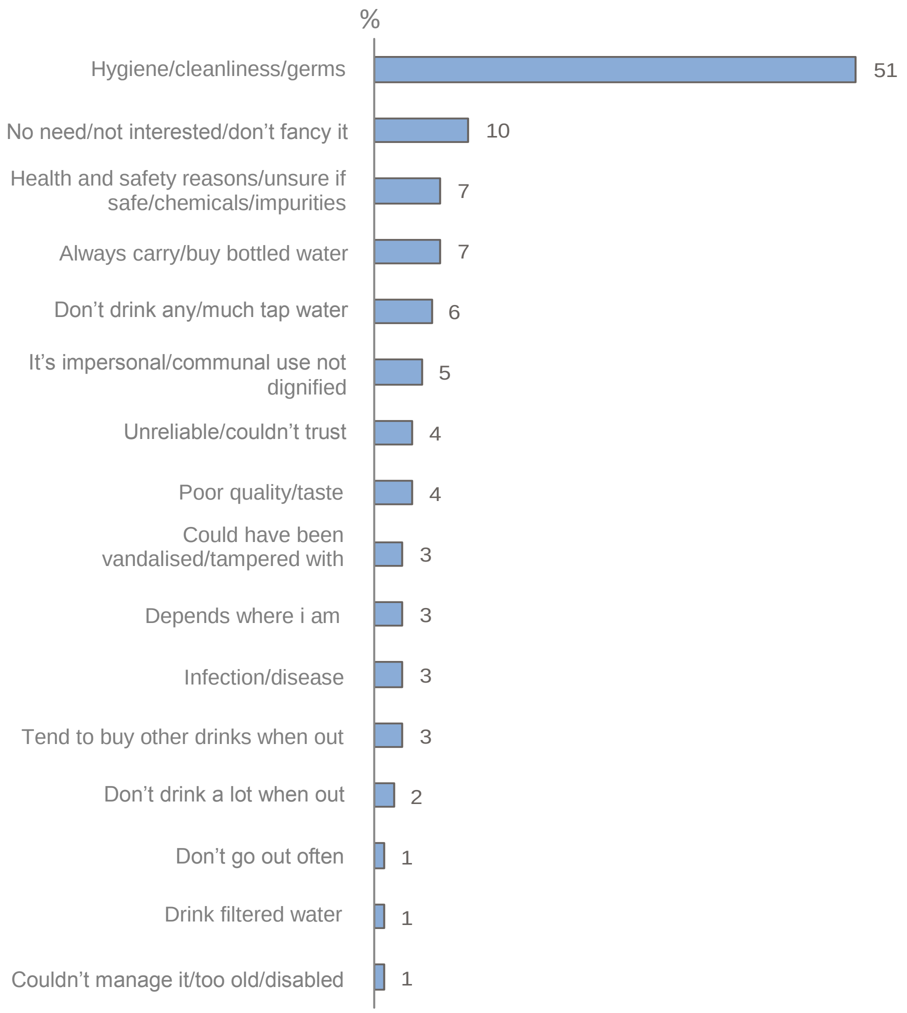
5.13 As the following chart shows, people interested in using drinking water fountains are more likely to say that they would fill a bottle rather than drink directly from a water fountain.

Chart 5.6: Proportion saying that they would drink directly from or fill a bottle from a public water fountain (Base: All likely to use public drinking fountains – 1118)



5.14 Among those who say that they would be unlikely to use public drinking fountains the main reasons are linked to hygiene/cleanliness.

Chart 5.7: Reasons people would be unlikely to use public drinking water fountains
(Base: All unlikely to use public drinking fountains – 883)

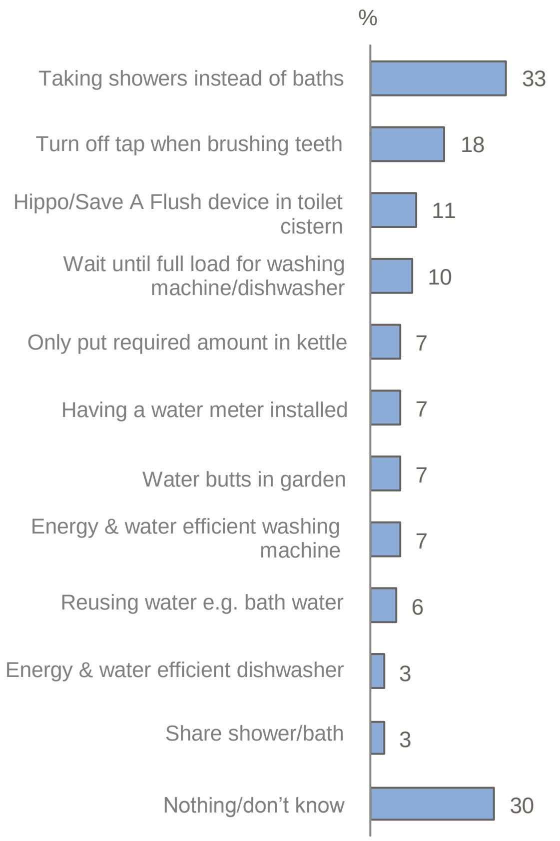


5.15 Younger respondents are more likely than older respondents to say that they would not drink from public drinking fountains due to hygiene/cleanliness issues.

Reducing use of water

5.16 Encouraging people to use water wisely is one of CCWater's key areas of work and a wide range of actions are claimed by customers to reduce their use of water. Seven in ten (70%) claim to take specific measures to reduce their use of water, but there are still three in ten (30%) who say that they don't do anything or don't know what they could do to reduce their use of water. These results are consistent with 2008 findings.

Chart 5.8: Actions taken to reduce use of water – main unprompted answers
(Base: All respondents)



5.17 Among households with a water meter, 16% say that this is a measure they have taken to reduce their use of water (this represents 7% of all respondents). Respondents with water meters are also more likely to say they have taken other measures to reduce their use of water such as having a water butt in the garden, reusing bath water or not watering the garden as much.

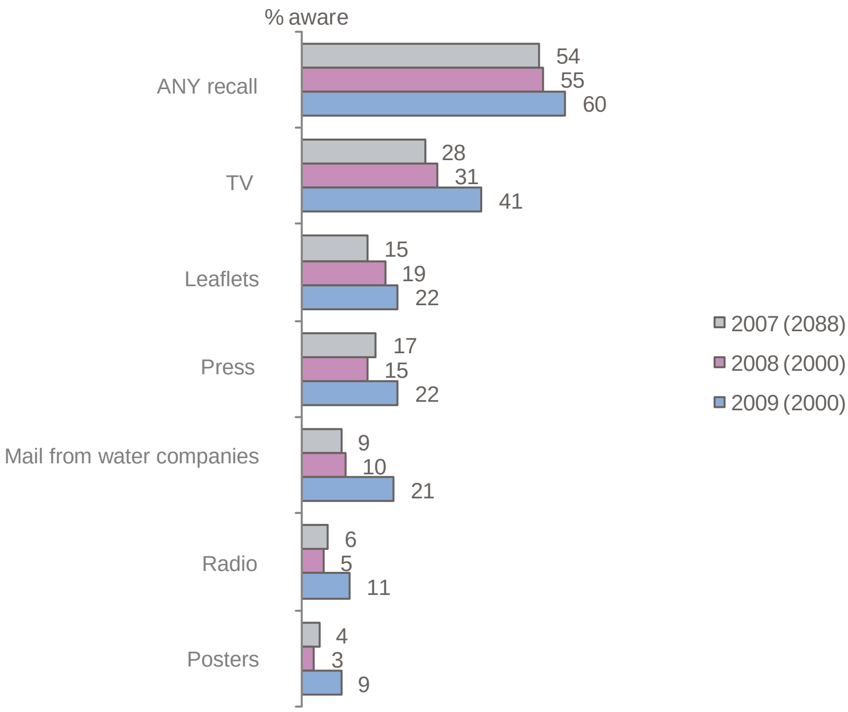
Awareness of water campaigns

5.18 Three in five (60%) claim to have been made aware of campaigns to use water wisely in the past 12 months (up from 55% in 2008).

5.19 There has been an increase in those saying that they have seen such campaigns on TV, through mail from water companies and on radio and posters.

5.20 Whilst the level of claimed awareness of water saving campaigns is encouraging, it may be that this awareness is being enhanced by other environmental campaigns with different ultimate aims.

Chart 5.9: How have you been made aware, if at all, of campaigns to use water wisely?
(Base: All respondents)



6. Keeping it clean

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

Summary

– There is some confusion among three in ten customers (29%) about what is acceptable to flush down the toilet, or dispose of via the sink or drain.

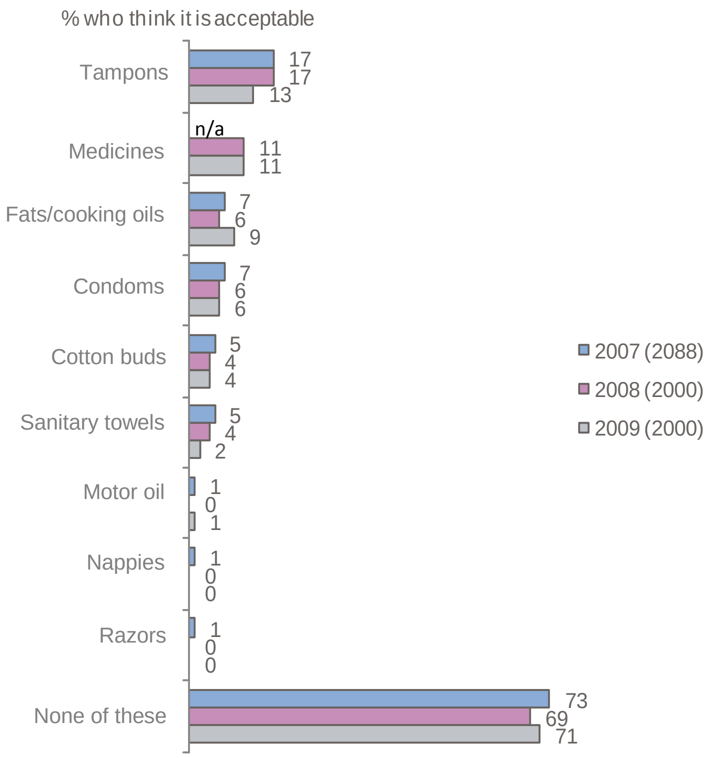
– 87% of respondents say that they are satisfied with their sewerage services. Satisfaction with different elements of sewerage services has fallen slightly over the past year but still relatively few are dissatisfied with any aspect of their sewerage services.

– Overall, one in twenty respondents (5%) say that they are dissatisfied with their sewerage services.

Disposing of waste

6.2 There are a number of items which are not appropriate to dispose of down the toilet, sink, or drain. None of the items listed in the chart below are acceptable, yet some respondents still believe they are. Seven in ten (71%) correctly answered that none of the items below are acceptable to dispose of down the toilet, sink, or drain and there has been little change in terms of what people think over the past three years.

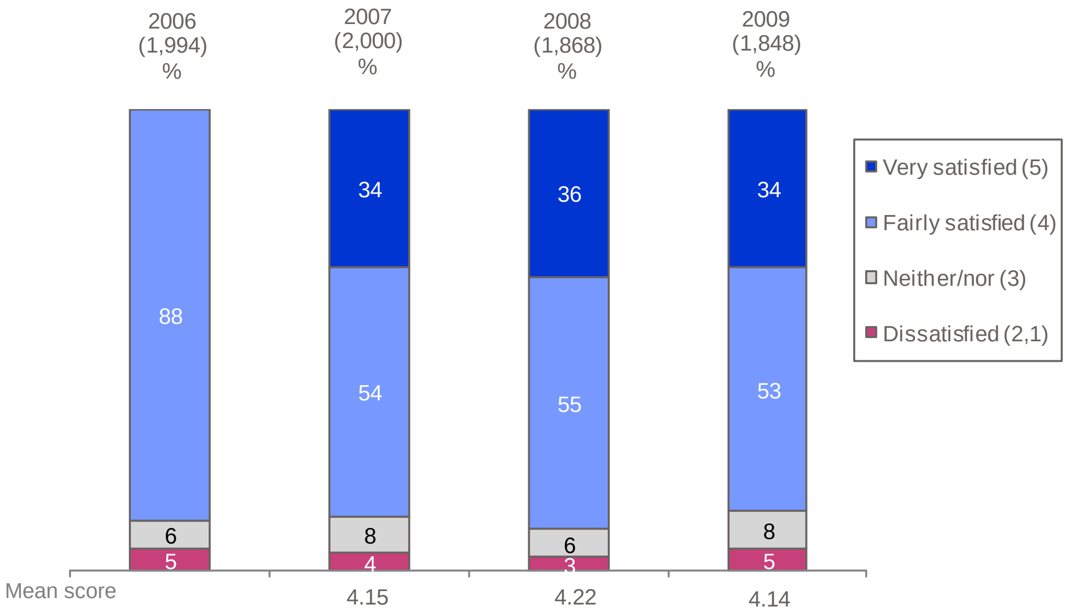
Chart 6.1: which of the following are acceptable to dispose of down the toilet, sink, or drain?
(Base: All respondents)



Satisfaction with sewerage services

6.3 In 2009, 87% of respondents say that they are satisfied with their sewerage services. Satisfaction with sewerage services has fluctuated slightly over the past four years but throughout this period only a small minority (3-5%) said that they were dissatisfied with their sewerage services.

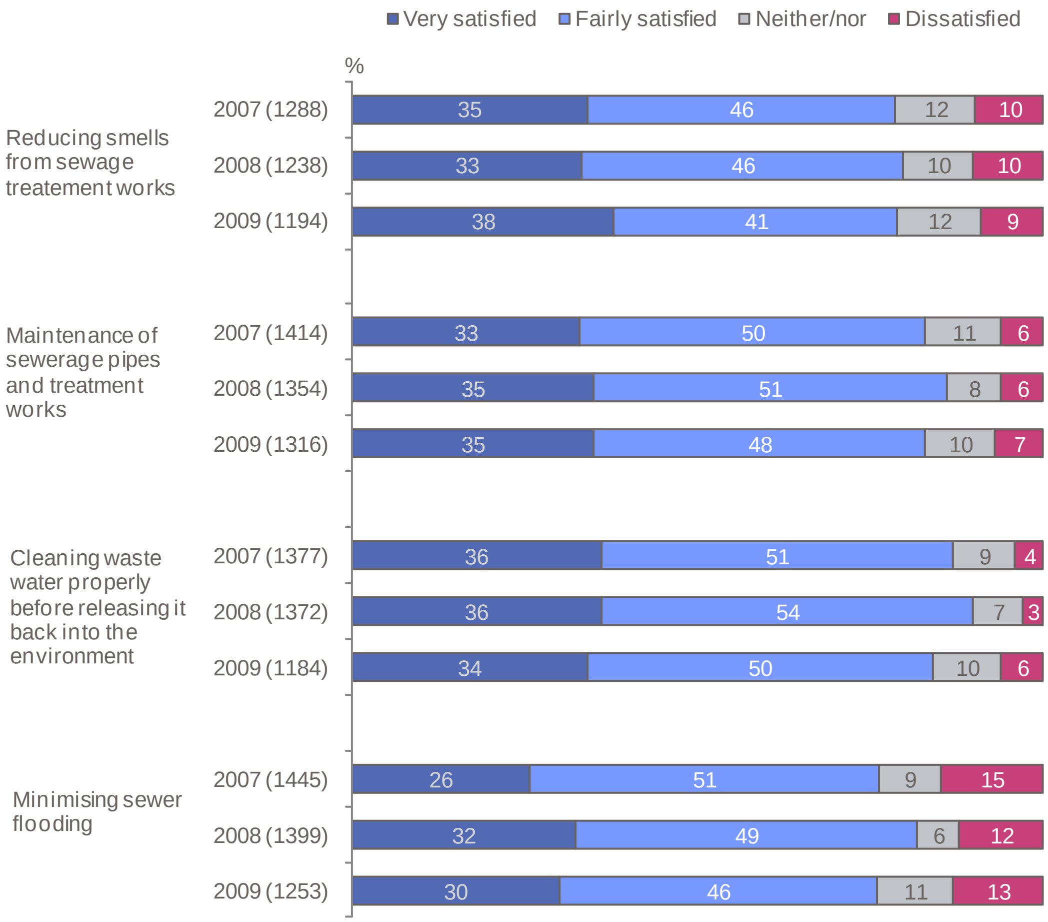
Chart 6.2: Overall satisfaction with sewerage services[6]
(Base: All respondents excluding those with septic tanks and don't knows)



[6] In 2006 a different scale was used. Therefore 2006 results are combined into one overall score for 'satisfied' and are not broken down by 'very' and 'fairly' satisfied

6.4 When examining in more detail customers' satisfaction with different aspects of their sewerage company's management of services, there has been a slight fall on all measures over the past year but even so, relatively few respondents are dissatisfied with any aspect of their sewerage service.

Chart 6.3: Satisfaction with various aspects of sewerage services
(Base: All respondents excluding those with septic tanks and don't knows)



7. Comparisons with other utilities

7.1 In this section we further examine perceptions of water companies and make comparisons with other utilities. Comparative value for money has already been covered earlier in this report; this section focuses on issues such as levels of trust and the feeling that companies care about the service they provide.

Summary

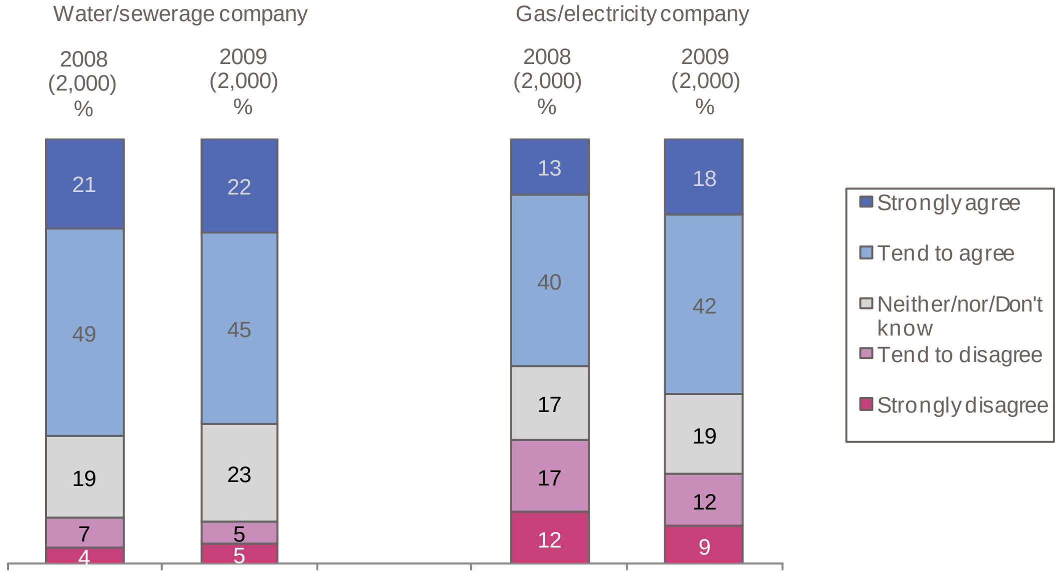
– Despite improving scores for energy companies, respondents are still more likely to think that their water and sewerage company cares about the service it provides more than their energy company does (67% compared with 60%).

– Respondents are more likely to say that they trust their water and sewerage company than their energy company.

Companies caring about the service they provide

7.2 In a competitive market such as gas and electricity where retaining customers is key to a supplier's business strategy one might expect customer service standards to be higher than the water/sewerage industry (where household customers are not able to switch suppliers). The proportion of respondents agreeing that their energy company cares about the service they give has increased over the past year, but customers are still significantly more likely to agree that their water and/or sewerage company cares about the service they give to customers.

Chart 7.1: Agreement that companies care about the service they give to customers
(Base: All respondents)

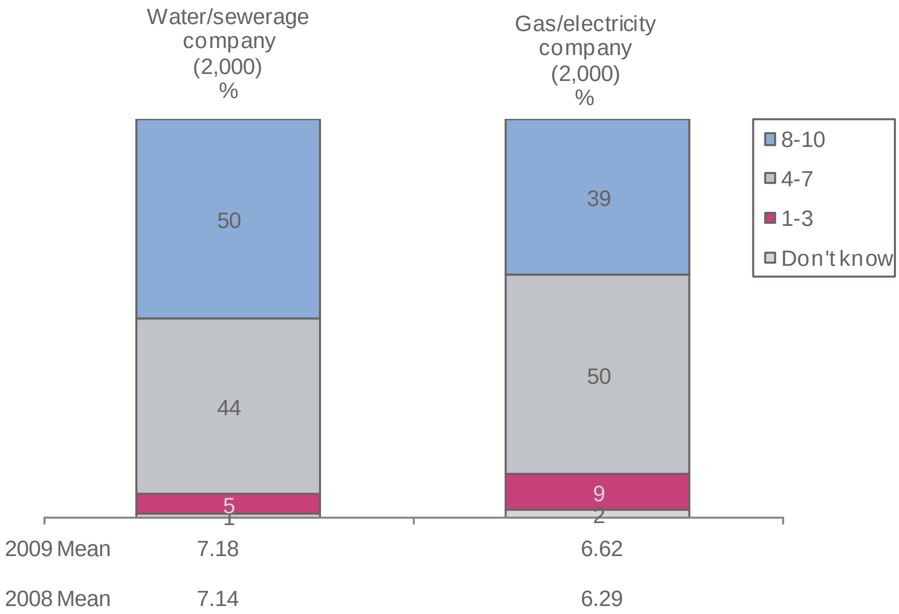


Trust in water/sewerage companies and energy companies

7.3 Respondents were asked how much they trust their water/sewerage company and energy company on a scale of 1-10 where 10 means that they trust them completely and 1 means that they don't trust them at all.

7.4 It is clear that customers tend to trust their water and/or sewerage company far more than they trust their energy company with half of respondents (50%) giving their water or sewerage company a high score of 8-10 compared with 39% giving their energy company the same high scores.

Chart 7.2: Trust in water/sewerage and energy companies
(Base: All respondents)



8. Speaking up for water consumers

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

Summary

– The majority of respondents (89%) would contact their water company if they had a problem.

– Spontaneous awareness of CCWater is very low (0.7% spontaneously mention CCWater as the consumer body for the water and sewerage industry – up from 0.3% in 2008)

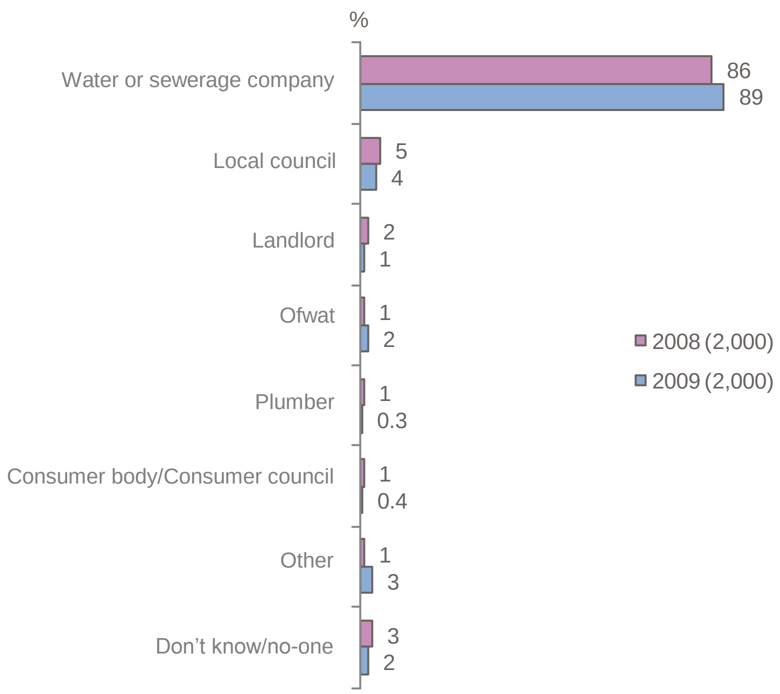
– When prompted one in five (21%) say that they have heard of CCWater.

– Despite low awareness of CCWater nearly all customers (92%) say that it is important to have a consumer body representing their interests in the water and sewerage market.

Who to contact to report a problem

8.2 The majority of respondents (89%) say that they would contact their water or sewerage company if they had a problem (this is consistent with the 2008 results when 86% said that they would contact their water or sewerage company).

Chart 8.1: Who would you contact if you had a problem with your water or sewerage services?
(Base: All respondents)

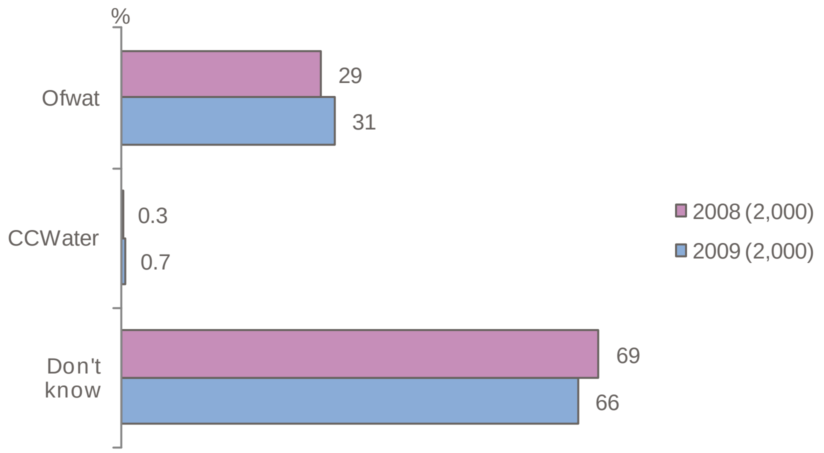


Awareness and perceived importance of CCWater

8.3 Spontaneous awareness of CCWater is very low, and among those who think that they know who the consumer body is, Ofwat is mentioned by most (31% of respondents think that Ofwat is the consumer body, compared with 0.7% who mentioned CCWater).

8.4 Although only 0.7% spontaneously mention CCWater as the consumer body for the water industry, this does represent a slight increase on previous years (0.05% spontaneously mentioned CCWater in 2007 and 0.3% in 2008).

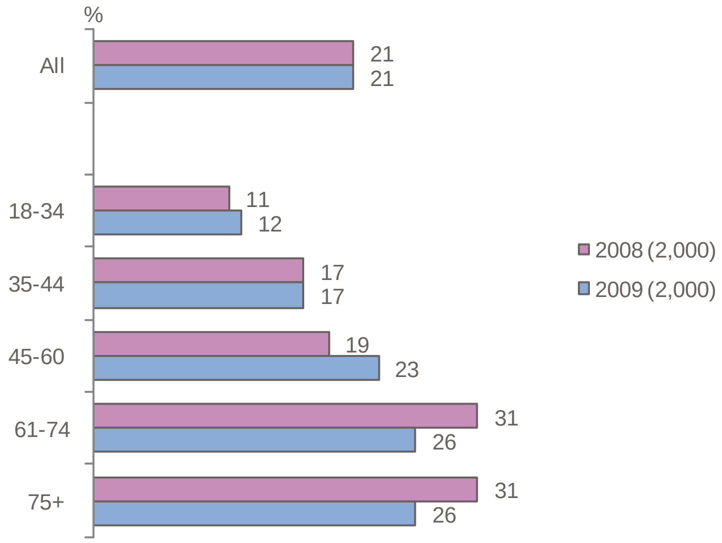
Chart 8.2: Do you know the name of the consumer body for the water industry?
(Base: All respondents)



8.5 Despite relatively low levels of spontaneous awareness, when probed, a further 21% of respondents claimed to have heard of CCWater before taking part in the survey.

8.6 As illustrated in the following chart, younger respondents are significantly less likely to say that they are aware of CCWater than older respondents.

Chart 8.3: Prompted awareness of CCWater by age
(Base: All respondents)



8.7 Of those aware of CCWater the majority (70%) were unable to say what CCWater does, 18% think it provides a voice for consumers, 6% think that it is a regulatory body, 3% think that it is a water company, and 2% think that it is part of Ofwat.

8.8 Despite four in five respondents saying that they are not aware of CCWater, the majority of respondents do still think that it is important to have a consumer body representing their interests about the water and sewerage services they receive. A quarter of respondents (24%) think that it is absolutely essential, 44% think it is very important, and 24% think that it is fairly important. Only 8% think that it is not at all/not very important to have a consumer body representing their interests about their water and sewerage services.

Chart 8.4: Importance of having a consumer body representing your interests about the water and sewerage services received (Base: All respondents excluding DK)

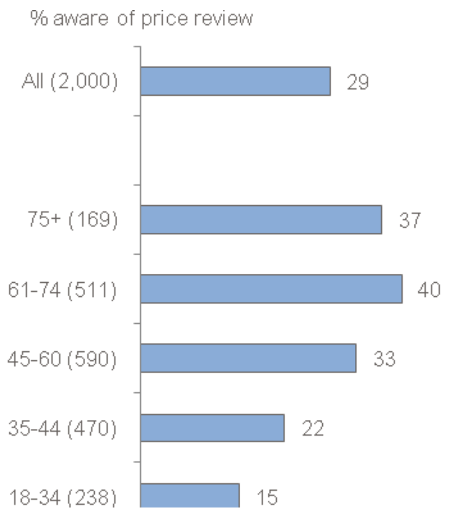
8.9 Respondents were asked about other issues relating to CCWater. Over half (51%) of the 21% who, when prompted said they were aware of CCWater, say that they would know how to contact CCWater if they had a problem or needed advice. This means that 11% of water customers are aware of CCWater AND would know how to contact them.

8.10 44% of those aware of CCWater rate them as being effective in representing their views and 37% say that they have seen references to CCWater or CCWater press notices.

9. Awareness of the Ofwat price review

9.1 Every five years Ofwat sets the price limits that water companies are allowed to charge their customers over the next five years. Questions were asked on awareness of the price review in order to examine whether the price review had any impact on opinions and attitudes towards other issues in the water and sewerage sector. However, there were very few differences in attitudes between those who were aware and those who were not aware of the price review. Possibly due to the relatively low-key media coverage of the price review final determinations three in ten respondents (29%) said they were aware that this had recently taken place. As shown in the chart below awareness is much lower among younger respondents.

Chart 9.1: Proportion aware of the Ofwat price review
(Base: All respondents)



9.2 Respondents in the South West were the most likely to say that they are aware of the review (51% aware).

9.3 Respondents were also asked whether they expect their bills to rise by more than inflation, in line with inflation, rise by less than inflation, stay roughly the same or decrease over the next five years. 78% of all respondents expect their bills to rise over the next five years:-

- 39% by more than inflation
- 36% in line with inflation
- 4% by less than inflation
- While 13% expect their bills to stay roughly the same and 3% expect them to decrease (6% don't know).

9.4 Those aware of the price review are more likely to expect their charges to decrease (7% compared with 2% not aware of the review), but even so, a majority expect price increases.

10. Conclusions

10.1 Over the past year there have been few changes in customer attitudes and behaviour in relation to issues in the water and sewerage industry. Where there have been changes these have tended to be minor and do not represent significant shifts in opinions and behaviour. Despite 2009 being a price review year and marked by an unusually tough economic climate the overall picture is one of stability and consistency.

10.2 Below is a brief summary of some of the changes and key findings:-

10.2.1 Respondents are marginally more satisfied with value for money from water and sewerage companies than energy suppliers, but the gap has closed with increasing satisfaction with value from energy companies. Satisfaction levels with value for money continue to be lower in the South West than in other regions, reflecting the higher average water and sewerage charges in that region.

10.2.2 Awareness of WaterSure/Welsh Water Assist Tariff has increased slightly over the past year but there are still substantial numbers who say that they would like to know more about these tariffs. There is also a significant minority (2%) who may be eligible for WaterSure/Welsh Water Assist but say that they have not heard of and do not need it.

10.2.3 Awareness of consumer rights and responsibilities, especially in relation to compensation, tends to be lower among younger respondents, those from lower social grades, single parents, black and minority ethnic groups and unmetered households. Increasing awareness among these groups is important to ensuring a good service to all customers.

10.2.4 Four in five adults think that tap water is at least as good for them as bottled water and this is consistent with 2008 findings. Continued campaigning on the part of CCWater and other organisations is likely to be required to further improve perceptions of tap water and accomplish the difficult task of changing the opinions of the minority who feel that bottled water is better for them.

10.2.5 Over half of respondents say that they would be likely to use public drinking water fountains and this would support the idea of making tap water more widely and freely available in public spaces. Hygiene/cleanliness is the main issue for those who would not use public drinking water fountains so perceptions of this will be important to address.

10.2.6 There has been an increase in those saying that they have seen campaigns to use water wisely on TV, through mail from water companies and on radio and posters. This is encouraging but it is important to note that it may be that this awareness is being enhanced by other environmental campaigns with different ultimate aims such as reducing household carbon dioxide emissions.

10.2.7 There is scope to increase awareness of what is acceptable to dispose of down the toilet, sink, or drain as there is still some confusion among consumers as to what is acceptable to dispose of in this way.

Appendices – The Questionnaire

FDS International Ltd
Hill House, Highgate Hill
London N19 5NA
Tel: 020 7272 7766 Fax: 020 7263 5202

C1	C2	C3	C4	C5	C6	C7
7	7	2	2			

Consumer Council for Water – 2009/10 Tracking Research
7722/SD

Introduction

Good Morning/Afternoon, my name is… calling from FDS International on behalf of the Consumer body for the water industry. We are currently carrying out a survey amongst the public about water and sewerage services. Could you spare some time to answer some questions?

READ OUT IF NECESSARY
The survey should take around 20 minutes and is intended to help ensure that you get a good service from your water 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.

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: Q1. Are you the water bill payer in your household? INTERVIEWER INSTRUCTION: If respondent says that they pay their water bill as part of rent code as 2 (CLOSE). **SINGLE CODE**		
Yes	1	Q2
No	2	CLOSE
Don't know	3	
If no/don't know at Q1 ask if there is somebody else in the household who is the bill payer. If yes, interview that person. If no, thank and close		
Q2. And which of the following applies to the way you pay your bills… **READ OUT**		
Sole bill payer		
Jointly responsible for paying the bill	1	
- With spouse/partner		
- As part of shared house	2	
Other (specify)	3	
Don't know	4	
	5	

Q3 Do you or any member of your family work in: **READ OUT**		
The water industry i.e. work for a water company	1	
A consumer organisation e.g. Consumer Focus or Consumer Direct Which?, Citizens Advice Bureau	2	Thank and close
Market Research	3	
None of the above	4	Q4
Q4a Who is your water company? (This may be a company which deals with your sewerage too.) **SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY**		
Anglian Water Services Ltd	1	
Dwr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	Q4b
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Water only companies		
Bournemouth & West Hampshire Water Plc	11	
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	
Dee Valley Water Plc	15	
Essex & Suffolk Water	16	
Veolia Water Southeast Ltd (formerly Folkestone & Dover Water Services)	17	
Hartlepool Water Plc	18	Q4c
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	
Veolia Water East Ltd (formerly Tendring Hundred Water Services)	23	
Veolia Water Central Ltd (formerly Three Valleys Water)	24	
Don't know	99	All respondents to check and arrange call back

Q4b And do they also provide your sewerage services, or do you have a septic tank?		
provide sewerage services	1	
Have septic tank	2	
Don't know	3	
Q4c 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 – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY**		
Anglian Water Services Ltd	1	
Dwr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
N/A – have septic tank	11	
Don't know	12	
SECTION A - COMPANY INFORMATION		
Q5a 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		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
Q5b And do you agree or disagree that it is clear how the final amount of your bill was reached? SINGLE CODE		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	

Q6 How satisfied or dissatisfied are you with the value for money of the water services in your area? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q7 How satisfied or dissatisfied are you with the value for money of the sewerage services in your area? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
ASK ALL DISSATISFIED (CODED 4 OR 5) AT Q6 AND/OR Q7 Q8 Why do you think you don't get value for money from your Water [and/or sewerage] services? **DO NOT READ OUT. MULTICODE**		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Poor/inefficient service/issues not resolved	3	
Poor water quality	4	
Problems with sewers/drains	5	
Leaking pipes	6	
Water meter issues/problems	7	
Other (specify)	8	
Don't know	99	
ASK ALL Q9 How satisfied or dissatisfied are you with the value for money from services such as…?: **READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.*		
a) Your energy supplier (gas and electricity)		
b) Your telephone landline supplier		
c) Council Tax		

ASK Q10 IF CODE IS HIGHER FOR 9a THAN Q6 Q10 Why do you say that you are more satisfied with the value for money from your energy supplier than the value for money from your water services? **DO NOT READ OUT. MULTICODE**		
Cheaper/better value	1	
Able to switch	2	
Better service	3	
No complaints/problems	4	
Fixed rate from energy supplier	5	
More information/communication	6	
Other (specify)	7	
Don't know	99	
ASK ALL Q11 How much do you agree or disagree that the water [and sewerage] charges that you pay are <u>fair</u>? **SINGLE CODE**		
Strongly agree Tend to agree	1	Q13
Neither agree nor disagree	2	
Tend to disagree	3	
Strongly disagree	4	Q12
Don't know	5	
	99	Q13
Q12 Why do you think that the water [and sewerage] charges that you pay are unfair? **DO NOT READ OUT. MULTICODE**		
Expensive/prices have risen	1	
Rates are unfair/should depend on size of household	2	Q13
Profits/shareholder paid too much	3	
Poor/inefficient service	4	
Poor water quality	5	
Other (specify)	6	
Don't know	99	
ASK ALL Q13 How much do you agree or disagree that the water [and sewerage] charges that you pay for are <u>affordable to you</u>? **SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	

SECTION B - CONSUMER RIGHTS & RESPONSIBILITIES		
Q14 How likely would you be to contact your water company if you were worried about paying your bill? **READ OUT**		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	5	
Q15 Does your household have a water meter? **SINGLE CODE**		
Yes	1	Q16
No	2	Q17
Don't know	99	Q17
Q16 Which of the following apply to you?		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
You had to have a meter fitted	3	
Other (specify)	4	
Don't know	5	
Q17 Were you aware that ...: **SINGLE CODE FOR EACH STATEMENT** Scale: 1=Yes, 2= No, 99= 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.		
INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is charged for water via a meter you cannot revert to non-metered charges.		

ASK ALL Q18 Are you aware of or are you currently on < the WaterSure tariff/Welsh Water Assist>? This was introduced to help people in low income groups who need to use a lot of water **READ OUT. SINGLE CODE**		
Yes, have heard of it but do not need it	1	
Yes, have subscribed to it	2	
No, but would like to know more	3	
No, but do not need it	4	
Don't know	99	
INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		
Q19 Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply. **READ OUT. SINGLE CODE**		
Yes, have heard of it but do not need it	1	
Yes, have subscribed to it	2	
No, but would like to know more	3	
No, but do not need it	4	
Don't know	99	
INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		
Q20 Were you aware that if your water [and/or sewerage] company fails to meet certain customer service standards for reasons within their control you may be entitled to compensation? **SINGLE CODE**		
Yes, was aware	1	
No, was not aware	2	
Don't know	99	
INTERVIEWER NOTE: If asked, information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company or their website		
Q21 How likely are you to read information provided by your water [and sewerage] company about the services you receive? (for example leaflets received with your bill)		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	5	

Q22 Have you contacted your water [and/or sewerage] company to make an enquiry in the past 12 months? **SINGLE CODE**		
Yes	1	Q23
No	2	Q25
Don't know	99	
ASK IF YES AT Q24 Q23 Why did you contact them? **DO NOT READ OUT. MULTICODE**		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	Q24
Billing enquiry	4	
Other (please specify)	5	
Don't know	99	
Q24 Thinking about your contact with your water [and/or sewerage] company, overall how satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE**		
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 query had been, or would be, resolved		
e) The way that the water company has kept you informed of progress with your enquiry *(and /or)* claim		
DO NOT ASK THOSE CODED 1 AT Q23 Q25 Have you made a complaint to your water [and/or sewerage] company in the past 12 months? **SINGLE CODE**		
Yes	1	Q26
No	2	Q29
Don't know	99	

ASK ALL CODED 1 AT Q23 OR CODED 1 AT Q25. OTHER GO TO Q31 Q26 How satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 99= don't know* **READ OUT EACH STATEMENT & SINGLE CODE**		
a) The speed of response to your complaint		
b) How well the company dealt with your concerns		Q27
c)Action taken as a result of your complaint to prevent the problem re-occurring		
Q27 Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled? **SINGLE CODE**		
Very satisfied	1	Q29
Fairly satisfied	2	Q29
Neither satisfied nor dissatisfied	3	Q28
Fairly dissatisfied	4	Q28
Very dissatisfied	5	Q28
Don't know	99	Q29
ASK ALL CODED 3,4 OR 5 AT Q27. OTHERS GO TO Q29. Q28 How would you have changed the way that your complaint was dealt with? **PROBE FULLY & WRITE IN**		
Please specify ________________________	1	Q29
Don't know	99	
ASK ALL CODED 1 AT Q22 or Q25. Q29 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water [and/or sewerage] company? **SINGLE CODE**		
Very satisfied	1	Q31
Fairly satisfied	2	Q31
Neither satisfied nor dissatisfied	3	Q30
Fairly dissatisfied	4	Q30
Very dissatisfied	5	Q30
Don't know	99	Q31

ASK ALL CODED AS 3, 4 OR 5 AT Q29. OTHERS GO TO Q31 Q30 You weren't satisfied, please could you say why? **PROBE FULLY & WRITE IN**		
Please specify ________________	1	
Don't know	99	
SECTION C – WATER ON TAP		
ASK ALL Q31 How satisfied are you with the following aspects of your water supply: **READ OUT EACH STATEMENT & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.*		
The colour and appearance of your tap water	1	
Taste and smell of tap water	2	
Hardness/softness of your water	3	
The safety of your drinking water	4	
The reliability of your water supply	5	
Your water pressure	6	
Q32 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
ASK ALL Q33 Which of the following do you think is better for you? **READ OUT. SINGLE CODE**		
Tap water	1	
Bottled water	2	
Both equally as good for you	3	
Don't know	99	

Q34 How much do you agree or disagree that you usually drink tap water rather than bottled water? **READ OUT**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	6	
Q35 If tap water was both widely and freely available in public spaces; from taps or drinking water fountains, how likely or unlikely do you think you would be to use them?		
Very likely	1	Q36
Fairly likely	2	Q36
Not very likely	3	Q38
Not at all likely	4	Q38
Don't know	5	Q36
Q36 Would you drink directly from a drinking water fountain in a public space?		
Yes	1	
No	2	
Don't know	3	
Q37 Would you fill your own bottle from a drinking water fountain or tap in a public space?		
Yes	1	
No	2	Q39
Don't know	3	
Q38 Why do you say that you would be unlikely to use them? **PROBE FULLY & WRITE IN. IF 'WOULD RATHER DRINK BOTTLED WATER' PROBE FOR REASONS WHY**		

Q39 What actions, if any, have you and your household taken to reduce your use of water? **DO NOT READ OUT. MULTICODE.**		
Having a water meter installed	1	
Taking showers instead of baths	2	
Water efficient shower/shower-head	3	
Energy & Water efficient dishwasher	4	
Energy & Water efficient washing machine	5	
Trigger device fitted to hosepipe	6	
Hippo/Save A Flush device in toilet cistern	7	
Lag pipes to protect against bursting	8	
Water butts in garden	9	
Turn off tap when brushing teeth	10	
Wait until full load for Washing Machine / dishwasher	11	
Only put required amount in kettle	12	
Reusing water e.g. bath water	13	
Share shower/bath	14	
Other (specify)	15	
Nothing	16	
Don't know	99	
Q40 How have you been made aware, if at all, of any campaigns to use water wisely in the past 12 months? **READ OUT. MULTICODE.**		
Television	1	
Billboards	2	
Radio	3	
Leaflets	4	
Mail from water companies	5	
Newspapers/magazines	6	
Other (please specify)	7	
Not aware of any campaigns to use water wisely	8	
Don't know	99	

SECTION D – KEEPING IT CLEAN		
Q41Which of the following do you think are acceptable to dispose of down the toilet, sink or drain? **READ OUT. MULTICODE** Fats/cooking oils Nappies Sanitary towels Tampons Razors Cotton buds Condoms Motor oil Medicines None of these Don't know	 1 2 3 4 5 6 7 8 9 10 99	
INTERVIEWER NOTE: If asked, none of these are acceptable		
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q42 How satisfied are you with your sewerage company's management of the following aspects of their service: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT AND SINGLE CODE** a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning waste water properly before releasing it back into the environment d) Minimising sewer flooding		
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q43 Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service? **SINGLE CODE** Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	 1 2 3 4 5 99	

Q44 How much do you agree or disagree that your water [and sewerage] 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	6	
Q45 How much do you agree or disagree that your gas and 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	6	
Q46 How much do you trust your 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		
Q47 How much do you trust your gas and 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		
Q48 Which of the following is more important to you? **READ OUT**		
Your water [and sewerage] bill being affordable	1	
Your water [and sewerage] company conducting its business ethically	2	
Both equally important	3	
Don't know	99	

SECTION E – SPEAKING UP FOR WATER CONSUMERS		
Q49 Who would you contact if you had a problem with your water [or sewerage] services? **DO NOT READ OUT. SINGLE CODE**		
My water or sewerage company	1	
My local council	2	
My landlord	3	
Ofwat	4	
A consumer body/Consumer Council for Water	5	
Other (specify)	6	
Don't know	99	
Q50 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	
Ofwat	2	Q51
Other (specify)	3	
Don't know	99	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q50. OTHERS GO TO Q52		
Q51 Had you heard of the Consumer Council for Water before now?		
Yes	1	Q52
No	2	Q53
Don't know	99	Q53
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q50, OR CODED 1 AT Q51. OTHERS GO TO Q53		
Q52 What, if anything, do you know about the Consumer Council for Water? **DO NOT READ OUT. MULTICODE**		
Water Company	1	
Consumer Body/provides a voice for consumers	2	
Does consumer research	3	
Part of Ofwat, the regulators	4	
A government agency	5	
Regulatory body for water sector	6	
Other (specify)	7	
Nothing/not sure	99	
READ OUT: The Consumer Council for Water was set up in October 2005 to represent customers of water and sewerage companies in England and Wales. The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to get (and be able to recognise that they are getting) high standards and good value for money in water and sewerage services, comparing well with the best of other service sectors.		

ASK ALL Q53 How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive? **READ OUT**		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don't know	99	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER <u>NOT</u> NAMED AT Q50. OTHERS GO TO Q58 Q54 Have you had reason to contact the Consumer Council for Water in the last year?		
Yes	1	Q55
No	2	Q57
Don't know	99	Q57
Q55 What did you last make contact about? **DO NOT READ OUT SINGLE CODE**		
To ask for information	1	
To comment on a service received	2	
To make a complaint	3	Q56
Billing enquiry	4	
Other (specify)	5	
Don't know	99	
Q56 Thinking about your contact with the Consumer Council for Water, overall how satisfied were you with: *Scale: 1= very satisfied, 2= fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE**		
a) The ease of contacting someone who was able to help you		
b) The quality/clarity of information provided		
c) The knowledge and professionalism of staff		
d) The feeling that your query had been, or would be, resolved		
e) The way that the water company has kept you informed of progress with your enquiry *(and /or)* claim		Q57

ASK ALL AWARE OF CCWATER Q57 How much do you agree or disagree with the following statements about the Consumer Council for Water? *Scale 1=strongly agree, 2=tend to agree, 3=neither agree nor disagree, 4=tend to disagree, 5=strongly disagree, 99=don't know* **READ OUT EACH STATEMENT & SINGLE CODE**		
I have seen references to CCWater or CCWater press notices.	1	
I know how to contact CCWater if I have a problem or need advice.	2	
I rate CCWater as being effective in representing my views	3	
Q58 Are you aware of any recent news or announcements that might affect your water [and sewerage] services or the charges you pay?		
Yes	1	Q59
No	2	Q60
Q59 And what was this news or announcement? **PROBE FULLY**		
Q60 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 currently taking]** has recently taken place?		
Yes	1	
No	2	
Q61 And over the next 5 years do you expect your water and sewerage charges to...**READ OUT**		
Rise by more than inflation	1	
Rise in line with inflation	2	
Rise by less than inflation	3	
Stay roughly the same	5	
Decrease	6	
Don't know	99	

SECTION F – BACKGROUND – ASK ALL		
For all respondents: Q62 Please record the gender of the respondent **DO NOT ASK**		
Male	1	
Female	2	
Q63 Which of the following age groups do you fall into? **READ OUT SINGLE CODE**		
18-24	1	
25-34	2	
35-44	3	
45-60	4	
61-74	5	
75+	6	
Refused	7	
Q64 How would you describe your ethnic background? **DO NOT READ OUT SINGLE CODE**		
White: British	1	
White: Irish	2	
White: Any other White background	3	
Mixed: White and Black Caribbean	4	
Mixed: White and Black African	5	
Mixed: White and Asian	6	
Mixed: Any other Mixed background	7	
Asian or Asian British: Indian	8	
Asian or Asian British: Pakistani	9	
Asian or Asian British: Bangladeshi	10	
Asian or Asian British: Any other Asian background	11	
Black or Black British: Caribbean	12	
Black or Black British: African	13	
Black or Black British: Any other Black background	14	
Chinese	15	
Other	16	
Refused	17	
Q65 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?		
Yes (self)	1	
Yes (other)	2	
No	3	
Don't know/refused	99	

Q66 How would you describe the composition of your household? **READ OUT SINGLE CODE**		
One person household	1	
Married couple household	2	
Married couple with dependent children (under 16)	3	
Married couple with non-dependent children only (16+)	4	
Cohabiting couple household	5	
Cohabiting couple with dependent children (under 16)	6	
Cohabiting couple with non-dependent children only (16+)	7	
Lone parent household:		
- with dependent children (under 16)	8	
- with non-dependent children only (16+)	9	
other (specify)	10	
Refused	99	
Q67 What is the occupation of the main income earner in your household? **CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS. IF PENSIONER/RETIRED PROBE FOR PREVIOUS OCCUPATION. SINGLE CODE**		
A – Very senior managerial positions (large organisations) and professional occupations	1	
B – Senior managerial; business owners. Middle management in large organisations	2	
C1 – Small employers; junior management and other non-manual occupations	3	
C2 – Skilled manual workers e.g. served apprenticeships, special qualifications or certificates	4	
D – Semi skilled and unskilled workers	5	
E – Casual workers; unemployed and otherwise not working	6	
Refused	99	

ONLY ASK Q68 IF WELSH WATER CUSTOMER (CODE 2 AT Q4A) AND NOT ON WATERSURE (NOT CODED 2 AT Q18) **OR** IF NOT WELSH WATER CUSTOMER AND METERED (YES AT Q15) AND NOT ON WATERSURE (NOT CODED 2 AT Q18). OTHERS GO TO Q72. Q68 As mentioned earlier in this interview, in certain circumstances some people may be entitled to assistance with their water charges. Can I just check is anyone in your household currently receiving any benefits or tax credits? Yes No	 1 2	 Q69 Q72
Q69 And are you/someone in your household responsible for three or more children under the age of 19? (they must be in full-time education and living in your home) Yes No	 1 2	 Q71 Q70
ONLY ASK IF SOMEONE IN HOSEHOLD HAS A DISABILITY OR LONG-TERM HEALTH CONDITION (CODE 1-2 AT Q65). OTHERS GO TO Q72. Q70 You mentioned that you/someone in your household has an illness, disability or long-term health condition. Does this medical condition mean that you have to use significant additional volumes of water? Yes No	 1 2	 Q71 Q72
Q71 And are you/someone in your household receiving any of the following benefits? **READ OUT** Council Tax Benefit (not the single person allowance) Housing Benefit Income support Income-based Job Seeker's Allowance Working Tax Credit Child Tax Credit (other than just the family element) Pension Credit Income related Employment and Support Allowance None of these	 1 2 3 4 5 6 7 8 9	

Q72 What type of accommodation do you live in? READ OUT SINGLE CODE		
Owner occupied	1	
Private rental	2	
Council tenant	3	
Housing Association tenant	4	
Leaseholder	5	
Don't know/refused	99	
Q73 Would you say you live in an urban or rural area? SINGLE CODE		
Urban	1	
Rural	2	
Suburban/semi rural	3	
Don't know	99	

Thank you for sparing the time to take part.

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

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

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

Sample Profile

	Unweighted		Weighted	
	N	%	N	%
Total	**2000**	**100**	**2000**	**100**
Region				
Eastern	199	10	240	12
North West	201	10	260	13
Northumbria	200	10	100	5
Midlands	198	10	320	16
South West	199	10	60	3
Southern	199	10	160	8
Thames	202	10	460	23
Wessex	203	10	100	5
Yorkshire	199	10	180	9
Wales	200	10	120	6
Age				
18-34	238	12	360	18
35-44	470	24	420	21
45-60	590	30	580	29
61-74	511	26	449	22
75+	169	8	151	8
Gender				
Male	895	45	915	46
Female	1105	55	1085	54
Household composition				
One person household	546	27	519	26
Two person household	621	31	624	31
One parent family	153	8	159	8
Two parent family	558	28	572	29
Other	87	4	85	4
Refused	35	2	53	3
Meter use				
Meter users	839	42	828	41
Non users	1161	58	1172	59
Social grade				
A	84	4	65	3
B	374	19	335	17
C1	556	28	560	28
C2	358	18	394	20
D	216	11	227	11
E	318	16	299	15
Refused	94	5	120	6