



**RESEARCH INTO STAKEHOLDER
VIEWS ON CCWATER**

THE REPORT

Prepared for:



Prepared by

Carol Goldstone Associates

Carol Goldstone Associates
Studio 11, 4th Floor
Old Truman Brewery
91 Brick Lane
London
E1 6QL

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Ref: CGA 07/308

Tel: 0207 375 3577

Fax: 0207 375 3566

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1. EXECUTIVE SUMMARY

Background and methodology

- CCWater has commissioned a survey to assess stakeholders' views of the organisation and its performance and to explore whether these key groups believe that CCWater is meeting its objectives
- The study was undertaken in two parts. Firstly a qualitative study comprising 25 depth interviews with stakeholders and secondly, a quantitative study of a further 75 stakeholders. Respondents interviewed for the qualitative interviews also completed parts of the quantitative questionnaire so that a total of 100 quantitative interviews are incorporated.

Awareness and Familiarity

- Around four out of five stakeholders claimed to know CCWater very or quite well with 14% who did not know it well. Familiarity was lower amongst secondary and tertiary stakeholders.
- Most stakeholders had multi-faceted relationships with CCWater. They were especially likely to be involved in collaboration and consumer focus. Secondary and tertiary stakeholders had a different pattern of engagement and were less likely to be involved in strategic planning and policy development.

Engagement

- A variety of communication channels operated between CCWater and its stakeholders. Selected channels were generally those which were appropriate for the purpose – for everyday work, phone and email were used most often. However, face to face meetings – both one off and more general meetings such as working parties or conferences – were the most highly valued.
- Many stakeholders, especially those from primary level organisations, had key direct contacts with a designated individual at CCWater the stakeholder organisation. This system, where it was in operation, was highly valued and works very well, restricting mis-communication.

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- Most stakeholders dealt *either* with their local regional office *or* with the national office in Birmingham. Engagement with both national and regional offices by the same individual was uncommon.

Access to CCWater

- Access was generally considered to be appropriate in both level and tone although a minority thought this was not always the case.
- The web site was generally well thought of and users did not report any difficulties in its use. Some noted that the site had recently been improved and the changes were welcomed. The site was considered functional rather than exciting or inspired but this was generally appropriate for a public sector body such as CCWater. Just one stakeholder strongly criticised the website because there was no subscriber service to advise of website additions.

Collaboration and Partnership

- Those currently engaging in collaboration or partnerships with CCWater were very happy with existing arrangements. There was no particular preference as regards who should be the lead organisation for a specific project or if the collaboration should include equal partnerships. In general, the organisation with the greatest experience in the subject matter should lead, depending on the content.
- Engagement was most frequent for on-going consultation, joint working, strategic development and advisory consultation. Each was mentioned by just under half the stakeholders surveyed.
- Engagement in conferences and training was uncommon. Multiple collaborations were most frequently with primary stakeholders.

Projects and Campaigns

- After prompting, most stakeholders were aware of the name of at least one of the CCWater projects or campaigns with greatest recall for using water wisely and forward work programme issues (each familiar to around two out of three stakeholders).

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- In the qualitative phase, it was apparent that familiarity with these campaigns was sometimes rather limited although a greater interest was shown when a campaign covered issues of particular interest or relevance to an individual.

Profile of CCWater

- Assessment of CCWater's profile was polarised with a slightly higher proportion rating the organisation as not well known (47%) than well known (37%). However, the overall consensus was that a high profile amongst the general public is not essential as consumers have a number of ways of finding out about CCWater if need arises such as via water companies or other water organisations, through web sites or through other consumer bodies such as Citizens' Advice.
- The most important recommendation for raising the profile was to improve relationships with people working in the media and preparing well written press releases with clear "pegs". This was generally described as being more "media savvy". This was a more appropriate route than, say, buying advertising.
- The aim should be to make CCWater an automatic choice for the press and media to approach for a quote when a story arose on water issues. The current level of media appearances by key CCWater staff was recognised but not all stakeholders perceived this as adequate.
- Amongst other groups such as politicians and other consumer groups, efforts should also be made to increase CCWater's profile. Networking (at a greater pace than is currently undertaken) was the best route for this.

Rating of CCWater

- Examining a battery of features in the quantitative phase, CCWater was highly rated in relation to its communications, especially for providing clear and understandable communications which use the right level and tone. CCWater was also rated as independent by two out of three stakeholders. These assessments were endorsed at the qualitative phase with broad praise for documents such as leaflets and other general communications. Although individual criticisms were voiced, it was more common for stakeholders to adapt documents for their own use as they were sufficiently pertinent and well written.

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- Another set of issues explored perceptions of CCWater in relation to its approach to research, information sharing and using an evidence base for policy. For these features, ratings were lower. However, the qualitative findings suggest that, although there are areas for improvement in these topics, many stakeholders did not have a clear understanding of CCWater's approach to the use of research as an evidence base. Similarly, although many stakeholders were on distribution lists enabling them to access CCWater information, others did not receive such mailings.

Priorities

- When asked to identify what should be CCWater's top priorities, stakeholders responses centred around a few themes, most of which related closely to the CCWater five strategic issues – right first time (the resolution of complaints); water on tap (reliable and safe water supply); flush and go (sewerage issues); value for money; and speaking up for the consumer.
- Issues which stakeholders wanted as CCWater priorities included affordability and price together with sustainability. Overarching these preferences was the problem of educating the consumer in all water related issues. Education was required both to empower the consumer and to encourage him to engage with conservation issues. Dealing with the PR09 price reviews was also a CCWater priority for some stakeholders.

Merger

- There was a wide awareness of the merger proposals. Views were polarised as to whether or not CCWater's merger into a larger consumer body would be a good thing.
- Factors favouring the merger were economies of scale and the ability for a larger and more influential body to be formed. There could be a single method for dealing with complaints and savings from merging several HR, finance and administration departments into one. However, those against the merger were worried about loss of water expertise and significant concerns that the level of service would decrease because of the reduction in staff numbers – especially for complaint handling.

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- Even those in favour of merger had doubts about the specific proposals currently on the table. Stakeholders noted that the merger plans had made it difficult for the young CCWater to establish itself properly as it has been fighting for survival since its inception.

National versus Regional

- CCWater was generally seen as a national rather than regional organisation, especially in comparison with its predecessor, WaterVoice. However, the need to retain some regional representation was stressed because of the regional structure of the water industry. It was understood that CCWater had chosen to establish its national presence before turning attention to the regional offices. There were some concerns about regional staff acting on their own authority and against national policy.

CONCLUSIONS AND KEY FINDINGS

Stakeholder perceptions of CCWater

- CCWater is highly regarded in relation to engagement with all stakeholders.
- There is slightly more ambivalence about CCWater's provision of information, the quality of its information and whether it bases its policies upon evidence. Only half or fewer thought that CCWater did these things very well or quite well (48% provision of clear information; 47% information sharing; and 38% has policies based on research).
- On balance, stakeholders perceive CCWater's profile amongst consumers to be low. Just 37% consider it to be well known as compared with 47% who think it not well known. However, this is not considered to be important.
- Stakeholders are generally familiar with the Forward Work programme (59%) and with other CCWater campaigns and projects, especially Using Water Wisely (68%). Those who use the website find it easy to navigate and think that it includes everything necessary.

How performance can be improved

- Stakeholders approve the current methods of collaboration and partnership and little change is wanted or recommended. As a consequence of working together, over four out of five stakeholders (83%) claim to know CCWater very well or quite well.
- Stakeholders do have a good relationship with CCWater generally although this is stronger amongst primary stakeholders than those considered to be secondary or tertiary stakeholders. Relationships with the latter groups does have room for improvement with increased proactive communication from CCWater.
- Around seven out of ten consider their access to CCWater to be at the right level (69%) and in the right format (74%) all of the time; the remainder consider these things to be correct at least some of the time. Although current communication methods are considered to be appropriate, increased face to face contact would be welcome, especially amongst the secondary and tertiary groups.
- CCWater's profile can be improved by becoming more "media savvy" and increasing the organisation's media presence. Some stakeholders have recommended increased networking although those in the primary group tend to be aware that this is regularly undertaken at the highest levels and do not agree that current efforts are insufficient.
- There are a range of opinions about the merger although even those in favour are concerned about some of the details of current proposals. Overall, one in three (32%) think it a bad idea as specialist knowledge will be lost whereas one in four (24%) think it a good idea to have all consumer bodies in one place.

2. BACKGROUND AND OBJECTIVES

2.1 Introduction

The Consumer Council for Water (CCWater) represents water and sewerage consumers in England and Wales and works through ten regional committees. It is independent of both the water industry and the regulator. It came into operation two years ago (1st October 2005), replacing its predecessor, WaterVoice.

Following a programme of public consultation, CCWater set out a Forward Work Programme; for representing customers of water and sewerage companies, focusing on five issues:

- Value for money
- Right first time (quick and easy resolution of problems)
- Water on tap (availability of a safe and reliable water supply)
- Flush and go (responsible sewage treatment)
- Speaking up for water consumers

Key targets have been set for each of these issues. Working together with other stakeholders in the water industry, it is anticipated that delivery of the programme should result in improvements for consumers.

A key target under the heading of “Speaking up for Water Consumers” is the aim of annual increases in the number of stakeholders who rate CCWater as influential in getting the best deal for water and sewerage customers.

In order to measure its performance and effectiveness and evaluate the level of success against this key objectives, CCWater decided to institute regular research with stakeholders to assess their views and experiences and track these over time. The research will also allow CCWater to explore its own public perception amongst this key group.

Carol Goldstone Associates (CGA), a specialist market research agency working exclusively in the public and social sector, was commissioned to undertake the stakeholders research and this document reports on the research findings.

2.2 Research Objectives

The overarching objective of the research was to establish a baseline position as regards stakeholder perception against which future improvements can be measured and to explore how CCWater can improve its performance in a number of key areas.

These objectives can be summarised as follows:

- To ascertain stakeholders' perceptions of CCWater's performance as regards:
 - Engagement with stakeholders
 - Views of stakeholders as regards CCWater's contribution to their work, provision of information, quality of information and evidence based policy
 - Attitudes of stakeholders as regards CCWater's profile with consumers
 - Commitment to the work programme and Vision Statement and the success of IT and website projects
- To examine how performance can be improved in the following areas:
 - Collaboration and partnership
 - Understanding of stakeholder organisations
 - Communication
 - Raising CCWater's profile
- To set baseline positions for stakeholders' perceptions about CCWater's performance that can be tracked over time

The research will inform CCWater's strategy development to ensure that it meets its key business objectives:

- To improve the perceptions of CCWater by stakeholders year on year
- To ensure media and opinion formers view CCWater as an authoritative voice in the industry and seek the organisation out for comment
- To undertake research programmes which reflect consumers' and stakeholders perspectives

3. RESEARCH METHODOLOGY

3.1 Overview

The study was divided into two main sections.

1. A qualitative study consisting of 25 depth interviews with stakeholders
2. A quantitative study consisting of 75 telephone interviews.

Because the number of stakeholders is relatively limited, even after including stakeholders who do not have very close ties to CCWater, it was considered impractical to undertake a totally quantitative study. Instead, the main objectives were tackled through the depth interviews with the small scale quantitative research survey providing some important benchmarking figures against which future progress can be measured.

The sample was provided by CCWater. A list of stakeholder organisations was prepared; in most cases, one or more named individuals were identified although alternative respondents were nominated by some of these named contacts. Each entry was given a rating level of 1 to 4 to indicate the closeness of the relationship, as perceived by CCWater.

All contacts were sent an advance letter (appended to this report) to advise them of the study.

The methodology for each of the two sections is described below.

3.2 Qualitative Study

A total of 26 depth interviews were completed with 19 organisations. Most were completed face to face although three interviews were undertaken by telephone. The depth interviews were mainly selected from those organisations which had been allocated a primary level by CCWater (i.e., they were in the group of stakeholders identified as the organisations with the closest relationship to CCWater) but a small number of interviews (5) were undertaken with secondary level organisations since it

was thought possible that stakeholders' views would differ according to their closeness to CCWater.

In most cases, the interviewee was the individual identified by CCWater although a minority of organisations nominated an alternate respondent if he/she was the person with most contact.

The completed interviews break down as follows:

Water companies	7
Government departments/agencies	9
Other water industry organisations	5
Others (e.g. consumer groups, charities)	5

The topic guide for the qualitative interviews is shown in Appendix 2. Interviews were conducted in June and July 2007; each was tape recorded and transcribed for the analysis.

3.3 Quantitative Survey

In addition to the depth interviews, other stakeholders were contacted by telephone for participation in a short quantitative interview. The key quantitative questions were also asked of the respondents in the depth interviews and their responses added to the data set. A total of 77 telephone interviews were conducted and the data set includes responses from 100 respondents in total.¹ Interviews were conducted with organisations identified as primary, secondary or tertiary levels

Quantitative interviews were undertaken by GfK NOP using CATI (computer assisted telephone interviewing) for increased accuracy and control. Interviewers were briefed by the CGA Project manager before starting work. Fieldwork was undertaken between 10th July – 10th August 2007.

A copy of the questionnaire is appended to this report (Appendix 3).

¹ A small number of depth interviews, where respondents were very short of time, did not include the quantitative elements as it was considered more important to use the time available to cover other issues.

IMPORTANT NOTE: Please note that although the report draws some comparisons between different groups of respondents, such comparisons should be treated with caution because of the small numbers of respondents in each sample.

4. CLASSIFICATION

- Stakeholders in the water companies generally worked with CCWater on a regional basis whereas other stakeholders had a more centralised view and had contact with CCWater's head office in Birmingham
- Most stakeholders claimed to know CCWater very well (28%) or quite well (52%) although primary stakeholders were more likely to know the organisation well.
- Amongst the wide range of relationships, the most common were collaboration (53%) and consumer focus (50%)

4.1 Respondent details

At the start of the depth interviews, stakeholders were invited to describe their job and the way in which CCWater was relevant to their organisation and, in particular, their own job. Qualitative respondents, all of whom personally engaged with CCWater, were generally very senior individuals in their own organisations – typically, at director level. It was common for this group to have teams of employees working under their control and often, some or all of the team members would also have regular contact with CCWater. A small number were less senior staff – for example, customer service manager.

There were evident differences between those working in the water companies and other stakeholders. The former tended to have contact only at the regional level and their involvement was with the local regional office. In comparison, most of the other stakeholders had contact only with the Head Office in Birmingham and, commonly, reflecting their own senior status, their key contacts were at Board level, especially with the National Chair, Dame Yve Buckland, and the Chief Executive, Tony Smith (generally referred to by their first names as Yve and Tony).

Most respondents had been stakeholders of CCWater since it was set up in October 2005 and many of them had previously had experience of dealing with CCWater's predecessor, WaterVoice. Although no direct comparison between WaterVoice and CCWater was ever sought, respondents often compared the two organisations when discussing their relationship with the current organisation.

Stakeholders often had long experience of the water industry, both through their existing jobs and previous employment. A small number of individuals interviewed were not water specialists and their knowledge of the industry was, in some cases, very sparse. A higher proportion of non-specialists were interviewed in the quantitative phase.

4.2 Organisation Details

As indicated above, the majority of organisations interviewed in both the qualitative and quantitative phases were involved in the water industry – these included water companies, government departments and government agencies as well as other organisations within the water sector.

A minority of identified stakeholders had their main purpose outside of the water industry and, as will be described later, this group tended to have different requirements of and familiarity with CCWater.

4.3 Familiarity and relationships with CCWater

From the quantitative interviews, four out of five stakeholders claimed to know CCWater well (28% very well, 52% fairly well) with just 5% neutral and 14% not well. The level of familiarity decreased with rating level – 97% of primary stakeholders thought that they knew CCWater very well or fairly well compared with 90% of secondary and only 57% of tertiary stakeholders.

It was evident that most stakeholders have multifaceted relationships with CCWater. As can be seen from the table below, most forms of relationship were mentioned by between half and one third of stakeholders with collaboration (53%), and consumer focus (50%) most likely to feature. Sponsorship (12%) was less likely to be part of the relationship than other areas.

Primary stakeholders were most likely to be involved in each type of relationship. However, it is particularly notable that secondary and tertiary stakeholders are far less likely to be involved with CCWater in relation to policy development or strategic

planning. Primary stakeholders are less likely to have a directly customer focussed relationship.

It should be noted that these differences will partially be a result of the way in which CCWater has chosen to identify those stakeholders with whom it has the closest relationship and who have been defined as primary stakeholders.

It was also evident that non-specialist organisations (i.e. those whose main purpose was outside of the water industry) also had lower familiarity with CCWater and were involved in fewer different types of relationship.

Table 1: Organisation's relationship with CCWater

	TOTAL	Stakeholder level		
		1	2	3
Base (All)	100	31	30	37
	%	%	%	%
Collaborative	53	58	60	43
Consumer focussed	50	39	67	49
Policy development	44	55	57	24
Advisory	43	42	37	49
Strategic planning/development	36	48	43	19
Sponsor	12	26	-	11
Other	19	26	17	16
Don't know/not stated	4	10	-	3

Further discussion of collaboration and partnership is detailed in Section 5.2.

5. STAKEHOLDER ENGAGEMENT

- Stakeholders and CCWater communicated using a range of methods, depending on purpose. However, face to face contact was the most desirable method (69%).
- The key contact system, where in operation, was highly thought of. The current methods of collaboration and partnership were also approved.
- A minority (around one in five) felt that CCWater's communications were not always in the right tone or format.
- Key reasons for engagement, each mentioned by between 40% - 50% of stakeholders, were on-going consultation, joint working, strategic development and advice
- Most stakeholders were aware of at least one of the CCWater projects or campaigns, especially using water wisely and the forward work programme.

5.1 *Methods of Communication*

As may be expected, all manner of communications were experienced by the qualitative respondents in their dealings with CCWater.

Amongst the most senior individuals, face to face meetings were common. Often, stakeholders would meet their CCWater counterparts at a variety of committees on which both organisations were represented or at industry conferences or dinners. In a small number of cases, conferences and social occasions were the most frequent form of engagement. Other face to face meetings were also mentioned. Such meetings, especially if convened solely between CCWater and the stakeholder organisation, tended to be infrequent but were generally highly valued.

Most stakeholders mentioned email and/or telephone as their most common routes for engagement. There was no evident preference for one route over another – the most appropriate mode would be used, dependent on the circumstances.

This was reinforced by the quantitative findings which showed that most stakeholders were happy to engage with CCWater using a variety of formats – although, as can be seen in the table, old fashioned post (either for personal letters or for general letters

or flyers) received only low levels of endorsement with electronic methods being generally preferred. There were also low levels of preference for using the website. However, as discussed in more detail below, those using the website regularly found it very useful.

Face to face – although, on the basis of the qualitative research probably the least used method – was the most favoured amongst all stakeholder groups. Telephone and personal email were most mentioned by primary stakeholders while general email was more frequently a preferred method of engagement for lower level stakeholders.

Table 2: Preferred method of engagement with CCWater

	TOTAL	Stakeholder level		
		1	2	3
Base (All)	100 %	31 %	30 %	37 %
Face to face	69	68	77	65
Email – personal	56	61	47	57
Telephone	55	74	57	35
Working party	24	26	17	27
Email – general	23	16	23	30
Post- personal letter	14	23	13	8
Website	14	6	23	14
Post – general letter/flyer	5	6	10	-
Other	2	3	1	-
Don't know/not stated	3	6	-	3

Use of the key contact system

Further discussion of engagement during the qualitative interviews revealed that for the majority of stakeholders, especially those in the primary list, a key contact had been nominated for inter-company communications. In these cases, the project respondent was generally the individual nominated by the stakeholder organisation.

This system was felt to work very well. Firstly, it meant that the nominated individuals in each organisation could act as the main conduit for communication and

would be fully aware of all dealings between the two organisations. This ensured that there was less likely to be duplication of effort or other problems resulting from imperfect communications. Additionally, familiarity with a named individual ensured that the stakeholder had a starting point to reach the most appropriate CCWater employee to deal with particular situations.

None of the organisations working through a named individual had any negative comments about their communications. They appreciated the relationship and were keen that it should continue and be encouraged.

Some stakeholders had a variety of contacts at different levels in the organisation. Thus, the most senior staff would be in contact with their counterparts at CCWater and other managers would have an appropriate contact lower in the CCWater hierarchy. Generally, although contact was on-going at different levels, there would still be the individual key contact to ensure that all relevant personnel on both sides were aware of any meetings or agreements between the two organisations, thus avoiding potential problems. This enlargement of the key contact system was also praised as working well. Several of the most senior respondents remarked that they assumed that all was well as they had not had any complaints or criticism about engagement from their teams dealing with CCWater.

Only a minority of stakeholders interviewed in the qualitative interviews had no key contact. These were generally secondary and tertiary stakeholders who had no need of regular contact with CCWater. Even in these cases, however, there was generally a known individual who would be the first point of contact when need arose although the arrangement appeared to be less formalised.

There was very little criticism of the engagement methods. All stakeholders had found the appropriate person – either in Head Office or the local regional office – through whom they could work. Examples of mis-communication were very unusual. Only where no immediate line of contact was apparent was there any uncertainty about how to engage with CCWater. In such cases, the stakeholder tended to assume that the lack of contact was due to themselves – they could be allocated an appropriate person if they contacted CCWater and requested this – and reflected the fact that engagement was sporadic and of low priority.

This was reflected in the quantitative findings. Nearly all stakeholders considered that their access to CC Water was at the right level or tone (69% all of the time, 24%

some of the time) and a similar number considered their access to CCWater to be in the right format (74% all of the time; 20% some of the time).

Table 3: Perception of access to CCWater

Access isat the right level	..in the right format
BASE (All):	100 %	100 %
Yes, all of the time	69	74
Yes, some of the time	24	20
No, never	1	1
Don't know/not stated	6	5

In each case, only 1% (i.e. one respondent) thought that their access was never at the right level or in the right format although there was a sizeable minority feeling that access was not always as they would wish it.

CCWater web site

Another issue of communication that was examined in the depth interviews was the success of the web site. Stakeholders ranged from those who had never visited the web site at all to those who were regular visitors of the site. Those in water companies were the most likely to visit the site with any regularity.

Overall, stakeholders had no problems in navigating their way around the site and were able to find the information they were looking for.

The website's pretty good, I find that easy to navigate, lots of stuff on there, which is quite useful.

Consumer body

On the whole, comments reflected a view that the web site was working well and quite practical although not totally inspired.

It's fairly nondescript. That's a bit harsh I think, but it is. It's set up in the ten regions, I can see where the minutes of the meetings are. It ain't sexy, that's for sure, but water ain't sexy is it?

Water Company

A small number of stakeholders were aware that changes had been made in the recent past and these were generally seen to have resulted in an improvement.

They improved it quite a bit, was it last year? .. I've got a colleague who works with me and he's a data analyst and he uses it quite a lot. So, and if there's stuff in there that he thinks I need to be looking at he will flag it up to me and I'll have a read of it.

Water Company

Just one stakeholder had strong negative views.

I think their website is weak. In that, if you take OFWAT, for example, they're, whenever OFWAT issue something new on their website, if you're a subscriber, you're automatically get an email saying, this is on the website. With CCWater that doesn't happen, there's no sort of subscriber service. So you've got to go looking for it, and again, I think it's all about raising their profile.

Water Company

5.2 Collaboration and Partnership

As noted in Section 4, around half of stakeholders, but especially primary stakeholders, were involved in collaborations and partnerships with CCWater. This was also true of those interviewed in the qualitative phase. Collaborations included sitting together in working parties, steering committees, putting together a joint position on government consultations and joint preparation of policy documents.

There was wide approval of CCWater's role in such ventures and expectations that all suitable opportunities would be sought. Within existing collaborations described, examples were given both where CCWater was acting as the lead partner and where it had a more supportive role.

In most collaborations, stakeholders noted, it was usual for one organisation to take the lead as this was the most pragmatic approach rather than all partners acting totally equally. Overall, the optimum format for a particular collaboration would evolve specifically from the circumstances which gave rise to it – “horses for courses”. There would be no ideal pattern to follow in all cases.

Equally important were the individuals who were put forward for the collaboration. These were expected to be at equivalent levels within the collaborating organisations – for example, regional managers or board members in each case.

It should be noted that there was no single perception of collaboration or partnership. For example, it was common for water companies to view the way that they work with CCWater as being a partnership or collaboration – each organisation had an interest in improving the situation for the consumer and therefore had common goals. Others took the view that collaboration was working on specific projects or as part of working groups.

Stakeholders were nearly all comfortable to work with CCWater and saw no need to recommend changes in the way that proceedings are currently conducted.

I think their relationship with us is very open, very honest and very constructive. They're not looking to win cheap points, they're looking to see proper improvements. So I think, I don't think I've got any issues there

Water company

However, for a number of different reasons such as internal or external changes, not all stakeholders were currently in a position to work in collaboration with CCWater. In addition, there was a suggestion from one of the water companies that some of their senior management considered it to be inappropriate to collaborate with the consumer body who dealt with their complaints.

It was seen as acceptable for collaborative partners to sometimes have contrary views and this was often inevitable because of the different perspectives from which each partner was working.

There's probably been a bit more friction with some of the other regulators perhaps, particularly the Environment Agency. But that's not too surprising because we always have to have consumers in our mind. The Environment Agency always has to have the environment in its mind and sometimes the two do bump into each other a bit.

Government body

Just one example was found of an organisation from within the water sector who preferred not to work in partnership with CCWater.

5.3 Reasons for Engagement

Stakeholders were asked in the quantitative interviews about the reasons why CCWater has engaged with them over the past two years. The four main reasons for engagement were on-going consultation (49%), joint working (46%), strategic development (44%) and in an advisory capacity (43%). Most other reasons for engagement were mentioned by at least one in four although fewer had engaged with CCWater for conferences (19%) or, in particular, training (8%).

Table 4: Reasons why CCWater has engaged with Stakeholder Organisation

	TOTAL	Stakeholder level		
		1	2	3
Base (All)	100 %	31 %	30 %	37 %
On-going consultation	49	58	50	41
Joint working	46	52	53	35
Strategic development	44	58	40	38
Advisory	43	48	37	46
One-off consultation	34	39	30	35
Steering Committee	26	48	13	16
Seminar	23	26	27	19
Conference	19	26	27	5
Training	8	13	10	3
Other	30	29	33	30
Don't know/not stated	7	10	-	11

Other forms of engagement were each mentioned by small numbers of stakeholders. These included contact through a regulatory role and championing customer complaints. Other types of engagement included market research, provision of CCWater publications and information about CCWater activities.

Patterns of engagement did vary slightly across the ranking level for stakeholders but generally, primary stakeholders were the most likely to be involved in on-going consultation and strategic development and they were far more likely than others to be involved with CCWater on Steering Committees.

5.4 Familiarity with Projects and Campaigns.

During the depth interviews, stakeholders discussed their familiarity with the specific projects and campaigns run by CCWater over the past two years. Most were aware of some of the work that CCWater had undertaken although hardly any recalled campaigns by name and only a small number recognised the campaign name after prompting. There was some recall that CCWater's campaigns tended to use "pun" type names. The extent of recall of the campaigns varied significantly by stakeholder. For many, there was only minimal recall of what the campaigns were about but others were able to discuss the content of specific campaigns, especially if these chimed with their own interests.

In the quantitative interviews, recall of CCWater's campaigns was investigated in a systematic way. Using water wisely (68%) had the greatest recall with half or more being aware of the Forward Work Programme (59%), Value for Money (48%) and Consumer Rights and Responsibilities (48%). The other campaigns were familiar to one in three or four of those asked. Not all respondents in the depth interviews were asked about the campaigns in detail which explains the fact that one in six could not recall any of the campaigns. There were no evident differences across stakeholder groups although secondary respondents were most likely to recall projects and campaigns.

Table 5: CCWater Projects or campaigns aware of

	TOTAL	Stakeholder level		
		1	2	3
Base (All)	100 %	31 %	30 %	37 %
Using water wisely	68	58	73	76
Forward Work Programme Issues	59	52	73	57
Value for Money	49	52	57	43
Consumer rights and responsibilities	48	42	60	46
Water on Tap	37	45	40	30
Flush and go/Cleaning up	34	48	40	19
Right first time	27	32	57	24
Other	18	29	10	16
Don't know/not stated	15	16	7	16

6. PROFILE OF CCWATER

- Views were polarised as to whether CCWater is (37%) or is not (47%) well known although the general consensus was that a high profile is not essential
- The key ways of increasing the profile were through exposure to the media and becoming more “media savvy”. Increased networking was also suggested.
- CCWater was particularly highly rated for understandable communications (74% rated as good) and using language at the right level or tone (73%). It was less well rated as having established a profile for all consumers (16%) or increasing its profile amongst all groups (13%).

6.1 Assessment of profile and whether it is at right level

Stakeholders were polarised in their views of CCWater’s profile. Around half rated it as not well known or not at all well known (47%) while slightly fewer (37%) rated it as very or fairly well known. The remainder (16%) were neutral. There was a slight tendency for primary stakeholders to consider CCWater to be well known than secondary or tertiary stakeholders, perhaps reflecting their own familiarity with the organisation.

During the depth interviews, before discussing ways of raising the profile, stakeholders were asked whether or not a high profile for CCWater amongst consumers was necessarily desirable and the consensus was that it was not essential.

Several individuals observed that, even if the CCWater name were not familiar to consumers, those with a need to know (e.g. with a complaint against their water company) would find the name through correspondence with the water company or from discussion with consumer bodies such as Citizens’ Advice. It was generally thought that any consumer with a need to contact CCWater would obtain its name and contact details through one source or another. A minority worried about whether this information would be readily accessible to the general public.

If you asked a consumer in the street, who’s the consumer representative on water issues, I don’t think anyone would, or very few people would be

able to tell you and it's a difficult nut to crack that I think. I don't necessarily think that's a problem, as long as people know where to find them when they need to, I think that's more critical and I'm not sure how easy that information is out there. I know, I've had a look at their website, the website's pretty good, but obviously that's not for everyone.

Consumer body

6.2. Ways of improving CCWater's profile

At the quantitative stage, those considering the profile to be low (i.e. CCWater was rated as not well known) were asked how this could be improved. The key observation, reflected also in the depth interviews, was that CCWater should be more "media savvy". At lower levels, the potential for becoming more prominent through free advertising (11%) and the need for PR09 to be more in the public eye (11%) were also mentioned.

Table 6: How CCWater's profile could be improved

	TOTAL
Base (All thinking CCWater not well known)	63 %
Be more media savvy	21
Become more prominent through free advertising	11
PR09 needs to be more in the public eye	11
Use the water companies to promote CCWater	8
Doesn't need to be improved	8
Regional profile already very good	3
Put education programmes through schools	2
Don't pay for advertising	2
Other	52
Don't know/not stated	21

A number of stakeholders gave minority answers. Some of these fell into small groups, each covering suggestions made by no more than five stakeholders. Several suggested that the profile could be raised by championing particular policies such as water metering, increased competition, vulnerable groups or PR09. Others

suggested advertising or marketing (e.g. running an advertising campaign on the amount of water use) although others were specifically advising against such advertising. A few suggested that undertaking and publicising research programmes would be the best route to improve the profile. The final group recommended increased networking or engagement with other stakeholders as the best route for increasing CCWater's profile.

Several of these issues mentioned by small numbers of stakeholders were also raised by those interviewed in depth. There was general agreement that CCWater should not use its restricted resources on paid for advertising in any way. Instead, the organisation should attempt to increase its presence in the media with more TV appearances or press quotes by high level CCWater staff (especially Chair Yve Buckland and Chief Executive Tony Smith). There were different opinions as to whether CCWater had been sufficiently visible in response to recent events.² Whereas some respondents had noted a number of relevant appearances, others felt that these had been too infrequent, allowing other organisations to take the initiative. There was, however, agreement that CCWater should assiduously cultivate relevant media contacts and ensure that they regularly found appropriate "pegs" on which the media could build stories. The best way of increasing the profile was to provide good stories for the media with well written and appealing press releases. The objective should be to ensure that CCWater was one of the first ports of call when any relevant water-related events occurred.

Other suggestions, drawn from both the quantitative and qualitative interviews, included greater involvement with other consumer groups. This could enable CCWater to work more frequently in partnership with these organisations and others and learn from their approach to the media. A small number of stakeholders suggested that CCWater's name was itself a barrier to increasing its profile since, unlike its predecessor, WaterVoice, the name was not easily recalled nor is its purpose immediately evident to those hearing it for the first time. However, none of

² Fieldwork for the depth interviews was undertaken very soon after England had suffered two periods of severe flooding in the Midlands and North East.

those making this point felt that a name change would be an appropriate move at this stage.

A minority view was that the profile was low because CCWater failed to engage with and support consumers. Issues of CCWater's engagement with consumers are considered in Section 7.

6.3 Raising profile amongst specific groups

In addition to exploring the profile of the organisation with consumers, other aspects of the profile were also considered in the qualitative interviews. Stakeholders were asked for suggestions as to how CCWater could more fully engage with various influential groups including not only consumers and the media but also politicians, other consumer bodies and other stakeholders. It was generally agreed that there was a need to raise the profile of CCWater amongst these groups, even though the public profile was less essential.

Not all stakeholders were familiar with the contacts already existing between CCWater and some of these groups. For example, several respondents suggested that CCWater should establish regular meetings with key politicians (e.g. those with a particular interest in environmental affairs) whereas others observed with approval that such meetings in fact take place on a quarterly basis.

"Networking, networking, networking" was the general thrust of recommendations from stakeholders as the means of increasing influence with all relevant groups. This was endorsed by those stakeholders from the groups in question (e.g. from consumer bodies, politicians and media), many of whom had regular contact already with CCWater. Nonetheless, it was felt that continuing communications were vital in order to enhance and invigorate existing contacts.

6.4 Rating of CCWater

In order to try to understand more about the existing profile of CCWater, all respondents were asked to rate the organisation on a number of different features. Ratings were on a five point scale where a score of five indicated that CCWater was

very highly rated on the variable whereas a score of one would indicate that CCWater was considered very poor for that feature.

The features most likely to be well rated related to CCWater's communications. Three out of four rated these as understandable (74%) or using language at the right level or tone (73%) and just slightly fewer considered the communications to be clear (67%). In each case, most others gave a neutral score although one in ten were not happy about the level or tone of language used. The final communications statement – that CCWater provides clear and relevant information on consumer issues – was less positively rated with only half (48%) providing a good rating and 17% considering this to be poor.

Evidence and research were less well rated than communications with half or fewer providing a high rating for CCWater's strength at information sharing (47%), providing information (37%), having policies based on research (38%) and being well established (29%). One in four felt that CCWater was not good at information sharing (23%) and was not research oriented (24%).

Stakeholders were likely to have a positive perception of CCWater as independent (67%); fewer considered it to be efficient (40%). Reflecting comments made in the qualitative interviews, only 29% considered the organisation to be well established and a similar number (28%) thought it was getting its messages across.

Respondents were more likely have a negative than positive view when asked if CCWater has established a profile for all consumers or whether it is increasing its profile amongst different groups.

In all cases, a sizeable minority (ranging from 11% to 52%) provided a neutral rating. While this will accurately reflect the opinions of some, it is likely that there are also a proportion who selected a neutral rating as indicating a lack of familiarity with CCWater and its work.

Table 7: Rating of CCWater

Base (All): 100		Very/quite well	Neutral	Not very/not at all well	Don't know/not stated
Has understandable communications	%	74	17	4	5
Uses language at the right level or tone	%	73	11	11	5
Is independent	%	67	18	10	5
Has clear communications	%	67	22	6	5
Is a national organisation	%	55	29	10	6
Provides clear and relevant information on consumer issues	%	48	29	17	6
Is good at information sharing	%	47	24	23	6
Is a local/regional organisation	%	44	31	19	6
Is efficient	%	40	41	12	7
Has policies based on research	%	38	39	17	6
Is excellent at providing information	%	37	40	17	6
Is research oriented	%	33	37	24	6
Is well established	%	29	46	20	5
Is getting its messages across	%	28	41	26	5
Has established a profile or segmented the market for all consumers in England and Wales	%	16	44	32	8
Is increasing its profile amongst different groups	%	13	52	29	6

All of these findings were more fully teased out in the qualitative depth interviews.

Stakeholders broadly believed that CCWater had made significant progress in its two years of existence but they would expect the organisation to require longer to reach its optimum position in the market as regards both consumers and stakeholders.

Many respondents spoke very positively about the progress to date. A number made comparisons with CCWater's predecessor, WaterVoice. In comparison, CCWater was felt to take a much more positive and realistic approach, for example towards price increases. The organisation was felt to be more balanced than its predecessor and not to automatically assume that water companies were wrong and should be opposed.

The predominant view was not universally shared. A minority of stakeholders felt that CCWater was merely a continuation of Water Voice in both personnel and policies. This minority view was more frequently found amongst organisations whose relationship with CCWater was at regional rather than national level, especially amongst some water companies.

The quantitative endorsement of CCWater's communications was strongly reflected in the qualitative interviews. Nearly all respondents were very positive about communications that CCWater despatched. This included consumer leaflets, reports, emails and all general communications distributed to stakeholders.

Just one or two stakeholders disagreed with this view. One respondent described the tone of CCWater's communications as "patronising" and another, not a water specialist, found them "unhelpful". Such comments were uncommon and, more typically, consumer organisations considered the CCWater literature so good that they regularly searched the website to find new documents that they could adapt for their own purposes.

Another range of factors that had been explored quantitatively related to the sharing of information and the perception of CCWater as developing research based policies.

As already discussed, most stakeholders were, to a greater or lesser extent, aware that CCWater was involved in campaigns and projects. Many were aware of the consumer research that had been undertaken and had been consulted on it or, at least, informed about the findings. There was a general belief that CCWater does indeed use such research to inform policies.

Only one dissenting voice was found. One stakeholder had been informed that a policy was based on research but had been unable to obtain details of the relevant findings from CCWater. He thought it probable that the information was accurate but was irritated that, contrary to promises, details had not been forwarded to him.

The qualitative interviews showed a range of views in relation to information sharing. Most stakeholders, especially those in the primary group, were on appropriate distribution lists and obtained details (generally through a hyperlink) of relevant information. Amongst the types of information mentioned were research findings, details of forthcoming events, copies of new consumer literature or leaflets and information about CCWater.

The fact that the information was sent by email and accessed via a hyperlink meant that individuals were free to choose whether or not to peruse the information, depending on whether or not they considered it relevant to them. Nobody complained that they were sent information surplus to their requirements and the flow of information was generally welcomed.

A small number of stakeholders were less confident about the information sharing and did not necessarily receive information that they would expect. In particular, one respondent in the secondary group received very little from CCWater although she felt that such information would be useful to her. She felt that the main fault was her own as she had not asked to be added to a distribution list.

“The only time that I ever read any information about them is whenever I choose to go onto their website...We don’t ever get CCWater press releases sent to us. So maybe that’s us, maybe we just need to get inclusion on a mailing list or something. Do you want to receive this, that, the other? Yes. I’d welcome it, I’d like that.”

Consumer body

Conversely, another non-specialist consumer body was grateful to CCWater for helping to tailor and simplify water related information in a way that was helpful to customers and ensured that advisers were properly briefed on water issues.

7. CUSTOMER PRIORITIES

- Stakeholders considered that the main customer priorities for CCWater should be to reflect the main issues covered by its strategy (i.e. right first time etc).
- In addition, priorities should include issues of price and affordability; representation of consumers in the PR09 price review; and undertaking an educative role to teach consumers about all aspects of water.

Within the qualitative research, stakeholders were asked to identify the top three customer priorities for CCWater. Although a number of suggestions were put forward, a few themes dominated the discussions.

Many of the issues raised reflected the main five issues covered by CCWater's strategy such as right first time (resolution of complaints), water on tap (reliable water supply), cleaning up (sewerage issues), value for money and speaking up for consumers. These were often approached from a different perspective and amongst the issues raised were affordability, sustainability, education of the consumer and issues relating to consumer rights.

Issues relating to price and affordability were one of the main priorities identified. As noted earlier, the consensus was that CCWater has a more realistic view about water pricing than was true of WaterVoice which tended to take this issue as its main cause. Within affordability, some stakeholders considered the problems of vulnerable groups to be key. A couple pointed out that research had shown that the general public are not enthusiastic about paying for those who cannot afford to pay for themselves. Nonetheless, CCWater had a role in representing all consumers and this particularly included those who are unable to help themselves.

Discussion of PR09 was most frequently raised during discussion of the key priorities. CCWater was seen as having an important role in representing all consumers in the price review rounds and this would be an evident priority over the next couple of years.

CCWater was also felt to have a role in putting forward the sustainability case and generally educating the consumer about all aspects of water.

Customer priorities, from where I sit it would be affordability, that would be the number one. And then I guess issues around sustainability, and then maybe as a subset of that, there would be the more use of water awareness. It seems to me that people still take water very much for granted.

Consumer body

There would appear to be a tension between CCWater's role as a consumer champion and its need to educate the consumer to accept the need for higher costs to ensure sustainability of supply.

CCWater is driven by customer focus, but also [has] a duty to manage water resources for the benefit of not just the environment but also society and the economy, which sometimes sits at odds with its environmental remit.

Government Body

On the one hand, CCWater was clearly seen as the body who should speak as a voice for all consumers. This covered both the need to speak on behalf of consumers when issues of government policy were under consideration (as with the PR09 preparations) and also the role of acting against water companies when complaints could not be resolved. Some stakeholders noted that the monopoly position of water companies can make such companies unresponsive.

(CC Water's priority) will be dealing with a company that is unresponsive because there are monopolies in their sector, for them there's no where to go, you're stuck. So [dealing with] lazy uncooperative companies

Consumer body

This role also includes monitoring areas of complaints, helping to prevent consumers having to deal with sewer flooding and generally keeping the water companies in check. Another of CCWater's priorities, linked to its role as the consumer voice, is to ensure that customers achieve value for money from their water company, especially in the light of service improvements caused by government initiatives for which customers ultimately have to pay. Value for money was also linked to the need to maintain and improve water quality and generally raise standards across the industry.

However, there was no doubt amongst stakeholders that CCWater has a key role to play in educating consumers in all aspects of water and generally increasing awareness.

They have a role in my view in advocating that water is a precious resource and it needs to be treated accordingly

Government body

Ideally, echoing the lessons being provided by the government and other parts of the water industry CCWater should be taking its part in raising the level of awareness would include encouraging customers to engage on issues of water efficiency, conservation and sustainability.

The key priority issues raised tended to reflect the perspective of the stakeholder so that, for example, consumer bodies generally included the need to be the voice of the customer as one of their priorities while water companies and others in the water industry almost all mentioned the need to educate the public about the use, conservation and sustainability of water as their main priority for CCWater.

8. MERGER OF CCWATER WITH OTHER BODIES

- Views were polarised as to whether or not CCWater's merger with other consumer bodies would be a good thing.
- Positive views perceived economies of scale and a consumer "one stop shop" to be advantageous.
- Others worried about the loss of expertise, felt that the proposal was designed only to save money and anticipated an inferior service to the consumer.

At the quantitative stage, three out of four respondents (75%) were aware of the proposed merger of consumer organisations including Energywatch, Postwatch and the National Consumer Council as well as possibly CCWater. In the qualitative sample, which included a higher proportion of primary stakeholders, there was near universal awareness of the proposed merger

In both the quantitative and qualitative interviews, views on the possible inclusion of CCWater in the new body varied from very positive to very negative. In the quantitative survey, for example, one in three (32%) thought that the proposed merger was a bad idea because specialist knowledge would be lost. Others also had negative views including the loss of power and independence (18%) of CCWater. On the positive side, one in four rated the merger a good idea because it would bring all the consumer bodies together. Other views included an observation that CCWater has not yet had long enough (15%) and a view that the sole purpose of the merger was to save money (10%). Primary stakeholders were more likely to have negative views than secondary and tertiary stakeholders

Table 8: Opinion of proposed merger

	TOTAL	Stakeholder level		
		1	2	3
Base (All)	100 %	31 %	30 %	37 %
Bad idea because specialist knowledge will be lost	32	39	37	22
Good idea to have all consumer bodies in one place	24	16	27	30
Will lose power/independence	18	26	13	16
CCWater hasn't had long enough	15	32	13	-
Only being done to save money/ reduce costs	10	13	7	8
Other	55	39	80	51
No opinion/don't know	7	13	-	5

Amongst the remainder of the stakeholders interviewed in the quantitative phase, many commented only that the proposal was a good or a bad idea, without expanding on their reasons. A number of others were neutral, either because they knew insufficient about the proposals or because they would want to “wait and see”.

Other comments amongst the quantitative respondents were that stakeholders could not see any customer benefits and that bodies should work together more closely but the relationship should not be formalised into a merger. Others suggested that the merger should include some of the bodies but not all of those proposed – various combinations were suggested but all excluded the National Consumer Council.

Similar views were expressed in the depth interviews. The main reasons for favouring a merger were economies of scale. It was recognised that there are some functions common to all consumer bodies and those putting forward this argument tended to believe that water should be included in with other services. A common complaints procedure and a single level of administration and bureaucracy (e.g. one HR office, one financial office etc) were generally perceived to be ways of decreasing overall costs without losing service levels.

I think the idea that there's one consumer body which can target its resources is an excellent idea. But I think then it has to be able to cover everything. So if it was going to have energy and Postwatch, I don't see why it doesn't have water. I think if you're going to have a consumer body

like that, then the idea is it should cover all areas. There's no point merging just a few and still having separate ones

Government body

there's obviously shared understanding there, shared experience, there are principles of consumer representation should be standard no matter what industry you're dealing with

Consumer body

A "one-stop shop" was also thought to be an asset to the customer.

I think consumers will understand it more, get better value out of it if it's a combined consumer body. I'd have everybody in there.

Water company

On the negative side, several respondents expressed concerns that the specific expertise of the water industry, evident in CCWater's dealings, would be lost.

My concern is that if you merge them, they will get swamped up with a very broad landscape. Now you could say, well that's fine for you to say, look at the agencies, got a huge landscape. But, on balance I think it's better to keep it separate. On the other side of course, bigger organisation, more clout, more money, more resource, all of that sort of stuff

Government body

You could say, oh well, have this huge organisation they won't know anything about the water industry – you'll just get a call centre somewhere and life will be easier. But actually I don't hold that view. ... I think it's much better when you're talking to people who understand the issues because it takes so much time otherwise

Water Company

They're all different, they're all specialised areas. And I think you need that specialist understanding

Water Company

There was an expectation that the merger was being pushed through purely for economic reasons and that service levels would drop.

It was initially not a bad idea because it doesn't look all that good to have a government sponsored consumer group for water, for energy, for post, rail passengers, airline passengers and a general one, all with a head office, all with a lot of duplication. But the way it's been done isn't all that good because the Treasury have seen it mainly just as an opportunity of cutting costs. So that rather than putting them together in a way that genuinely strengthens them, they're putting it together in a way that they can cut costs to the maximum so the actual level of service to consumers will fall dramatically, and so in that regard I think it's a bad thing

Consumer body

Moreover, there was a possibility that staff would be too few or too untrained to deal with the range of topics of the new body with water issues suffering disproportionately because of the specialisation involved.

Among those broadly in favour of the merger, doubts were expressed in relation to some of the specific arrangements proposed.

One respondent noted that confusion was likely to be caused, especially in Scotland, because of the different geographic reach of the various arms of the new body.

The thing that concerns me most is that CCWater only deals with England and Wales whereas Post Watch and Energy Watch are more national. They're UK in the case of Post Watch and Great Britain as for Energy Watch. And I just, I think it would be confusing for certain consumers who may go to the one body for post and energy but, and in Scotland it is different.

Government body

Even those most in favour of the development of a single consumer organisation observed that CCWater had not been in existence long enough to maximise their potential impact on the water industry.

It's so soon after CCWater has been formed. If they're going to do that just two or three years after, why did they form it?

Water company

These qualitative views were strongly endorsed by the quantitative findings. At this stage, a similar range of opinions were found. One in three thought the merger a bad idea because specialist knowledge would be lost (32%); in addition, 15% thought that CCWater had not had long enough to make its mark and 18% thought that CCWater would lose power or independence as a result of merger. However, one in four (24%) did think that it was a good idea to have all consumer bodies in one place.

Overall, therefore, arguments were seen both for and against the merger although the majority were not in favour or could see major barriers. It was generally seen as being a considerable distraction to those in the water industry while promising to provide little added value. There were concerns that a merger would dilute the focus on water which was perceived to be different from the other merging services since water is fundamental to life. However, many stakeholders considered that the inclusion of CCWater in the merged body was a “done deal” and would be only a matter of time.

9. CCWATER – NATIONAL OR REGIONAL?

- Stakeholders were split as to whether they perceived CCWater as a national body (35%) or both a national and regional body (49%); few (9%) perceived it as a regional body only.
- This was in sharp contrast to WaterVoice which was generally perceived as purely regional
- Some concerns existed about regions operating independently from Head Office.

At the quantitative stage, respondents were asked whether they perceived CCWater as a national or regional body. The majority were divided between those considering CCWater to be a national organisation (35%) or, more frequently, both regional and national (49%); only a minority considered the organisation to be primarily a regional body (9%).

These findings were endorsed also in the rating of statements discussed above where just over half (55%) rated CCWater as a national organisation and slightly fewer (44%) as a regional organisation.

In the depth interviews, stakeholders enlarged on their views about this. In general, it was felt that great pains had been taken to ensure that CCWater was, and was perceived to be, a national body. In particular, comparison was made with WaterVoice which was seen to be a number of regional organisations held together in a loose federation.

The old WaterVoice, constitutionally in statutes, was the sum of ten regional committees and the national bit was a convenience, but it wasn't in the statute. Well, now it's the other way round, really. ... I think it's right that the centre should be more powerful than the regions, even though, because the balance in the old WaterVoice was the wrong way round.

Government body

There was an acknowledgement by some stakeholders that CCWater needed to impose authority from the centre at the start before it should concern itself about the regional offices.

“CCW is a relatively young organisation ... therefore perform it has needed to understand how it's going to work as a new national organisation, how its exec is going to work, how its non exec is going to work, how it's going to organise itself. If you start national you then make sure that the national regional links are in place, and you ensure that you're getting consistency between what the policy of an organisation is nationally, and what is being said by that same organisation at the regional level”

Consumer body

However, there were some concerns that the relationship between the national and regional offices was not currently in an ideal state and some stakeholders were concerned that the regional offices were insufficiently under the control of the Head Office.

You will get different perspectives from within the regional offices and sometimes there are then some tensions between those perspectives and what CCWater are saying nationally. And some of that you can put down to legitimate regional differences and some of it you can put down to the personal opinion of the regional Chair and that tends to come through in some cases.

Government body

This was of particular concern for those who were engaging regionally because they were particularly affected by conflicting messages coming from the regions and the centre.

Examples were mentioned of regional chairmen who had acted on their own authority, for example, in publishing information before the embargo time or publishing information that was incorrect.

There needs to be more central oversight, for example, of the releases that are issued by the regions. We've had a number of occasions where a press release has been drafted by the region and issued by national, and it was wrong.

Water company

Overall, therefore, stakeholders showed a mixed attitude towards the national/regional division within CCWater. The emphasis on the national picture was

welcomed – although the reality of regional water companies means that a regional structure was considered essential – but it was felt that more progress was needed before the balance was correct, with the regions following the national dictat.

10. REGULATORY POWERS

- There was little call for CCWater to be given regulatory powers as the existing situation was felt to work adequately.
- Water companies indicated that, although under no compulsion, they would always follow CCWater's recommendations.

It was interesting to note that there was little call for CCWater to have its regulatory powers increased. Although it has only an ability to recommend a course of action to a water company, this was seen to be sufficient and no additional benefit would therefore accrue to the public by adding legislative powers to CCWater's position.

The general view of the water companies themselves was that they would always listen to what CCWater tells them.

If CCWater said I think you're completely wrong, you've given this customer absolutely appalling service, we think you ought to compensate them £200 and write a letter of apology, we'd do that. ... Every company would take that on board and they do it, they listen to them.

Water Company

However, some respondents from water companies did express doubts that their colleagues in other companies would necessarily be as willing as they were.

One water company noted that the regulatory powers did mean that he was more definitely going to be influenced by what OFWAT instructed him. Nonetheless, he, too, would follow CCWater's recommendations because it was the most appropriate route, would not cost too much and would avoid negative publicity.

Lack of regulatory powers was compensated for by influence.

They might not have direct powers, but they have got influence

Water Company

There was some suggestion that CCWater's lack of regulatory powers meant that there is a reasonable balance of responsibilities across the regulators and other water industry organisations, including CCWater

Overall, the status quo was seen to be working well, with CCWater using its influence appropriately.

In the time they've been in existence, they've proved themselves to be a force for the good in the water industry. Because they're not a regulator, like the Environment Agency or Ofwat, they're not a government department like Defra and they're not allied to the water companies in the way that WaterVoice was, so they've got their own identity and I think they've capitalised on that very well

Government body

11 LESSONS LEARNED AND CHANGES TO MAKE

- Amongst the best of CCWater's working practices were the key contact system and its methods of partnership and collaboration.
- There was, however, a perception that the level and tone of communications and the degree of information sharing may have some room for improvement.
- Most importantly, an increase in media presence would be positively considered by stakeholders.
- There is also room for improvement between CCWater and those rated as secondary or tertiary stakeholders; relationships with primary stakeholders are generally at a good level.

A number of lessons are evident from the research and the views of stakeholders. However, it is important that the lessons should include awareness of things that should *not* be changed in addition to identifying those areas where prudent change would be beneficial to CCWater, its customers and/or its stakeholders.

Amongst the things that should be left well alone is the existing key contact system. Communication channels appear to work very well and the key contact system is highly appreciated where it is in place. It ensures that proper and accurate two-way communication takes place between CCWater and its stakeholders. However, the system is more prevalent amongst the higher level stakeholders and it is possible that others could also benefit from expansion of the system. Similarly, collaborative working is currently perceived as successful and is seen as a CCWater strength.

While expansion of these successes may be seen as desirable, it is possible that there may be some resistance from lower level stakeholders who do not wish to increase their engagement with CCWater because they cannot see how this could benefit them or their organisation.

While communications generally are perceived to be at the right tone and level, there is undoubtedly some room for improvement in this area. Nonetheless, any changes should be introduced with some caution – the current system has a high level of approval and the intention would be to improve rather than worsen the situation.

There is also room for improvement in the area of information sharing. While many stakeholders are happy with the degree of information sharing, others are more dubious. It may be opportune to provide all stakeholders with an invitation to indicate what additional information provision they would welcome, if any. Similarly, stakeholders vary in their familiarity with CCWater's use of research to produce evidence based policies. This links with the need for additional communication.

Not all areas are seen to be as successful as those discussed above. In particular, CCWater is perceived as having a low profile and some stakeholders believe that the organisation's success could be increased if the profile were enhanced. The single area most identified for improvement is the need to improve media relations to make CCWater a more automatic spokesman for the industry. This means both increasing the networking and contacts with the media and also increasing the number and quality of relevant press releases. The range of media to whom these are sent may also need to be widened. More regular press exposure will increase the profile of CCWater and thus enhance its reputation.

While press relations are the most obvious route for improving CCWater's profile, a more proactive approach to other groups should also be considered. While it was appreciated that CCWater does have a quiet and behind the scenes influence, this was not always felt to be sufficient. Although not seen by all stakeholders to be essential, none felt a higher profile to be detrimental to CCWater.

CCWater is still perceived as a new organisation which has yet to reach its highest levels of performance and impact. One area where it has been seen to be reasonably successful is in encouraging its perception as a national rather than regional organisation, in contrast to WaterVoice which was primarily a regional organisation. However, the balance is, perhaps, not yet right. There is still some perception that the regional offices may act independently of head office. At the same time, there is a need to provide the regional offices with increased autonomy in specific areas so that regional issues can be dealt with more practically.

Finally, it is evident that there are definite changes across different types of stakeholder. The first variation is the stakeholder type. It is, perhaps, not surprising that water companies and other water industry organisations, government bodies and non-specialist organisations such as consumer bodies should have different perceptions of CCWater and its operations. This should not be problematic in itself.

However, in its dealings with stakeholders, CCWater should always take into consideration the type of body with which it is dealing.

Perhaps of greater relevance, responses were evidently different across different rating groups. Although this is partly a result of the way that these have been defined, those defined as secondary or tertiary stakeholders levels are less familiar with CCWater, have far less knowledge of the organisation and are more likely to feel unengaged with the organisation.³ If CCWater feels a need to engage with secondary and tertiary stakeholders, it must increase its efforts at involvement and encourage more collaborative working.

Overall, CCWater has a high level of regard from its stakeholders. They perceive the organisation as broadly succeeding in its aims and working in a way with which the majority approve. Any criticisms should therefore be put into the context of a highly successful first two years and the undoubted goodwill of its stakeholders.

³ The lack of engagement of secondary and tertiary stakeholders resulted in a much higher level of refusal from this group to participate in the research. Those in this group often failed to perceive themselves as CCWater stakeholders, felt their level of knowledge about the organisation was insufficient for them to participate in the survey and meant that they were far less willing to make time for the interview.

APPENDIX 1: ADVANCE LETTER TO CONTACTS

Name

Org

Add1

Add2

Add3

[Date]

Dear (Contact Name)

As a valued associate of the Consumer Council for Water, I am writing to ask you to help us with an important evaluation which will to inform our strategic plan and decide on the best ways of working with our stakeholders. A key element in that evaluation is a consultation with stakeholders.

We have commissioned a company of independent researchers, Carol Goldstone Associates (CGA), to undertake the consultation on our behalf and you may be asked to participate in one of two parallel studies. The first is a one-off in-depth interview, which will last around 45 – 60 minutes. We would normally expect the interview to be conducted at your place of work and during working hours but we can arrange for alternative locations and/or an out of hours appointment if this will be more convenient to you. The interview will explore your perception of CCWater and how you would like our relationship to be improved. Alternatively, you may be asked to participate in a short telephone survey lasting just seven or eight minutes.

One of CGA's executives will be in touch with you over the next few weeks to see if you are willing to participate in our study and arrange a convenient time. CCWater will not know who is being interviewed and your contribution will not be attributed to you personally or to your organisation.

You can obtain more information from CGA or opt out of the study by phoning 020 7375 3577 or emailing meena@carolgoldstoneassociates.co.uk . You can also contact my colleague, Diana Horth on 0121 345 1041 or diana.horth@ccwater.org.uk.

I very much hope that you will spare time to participate in this study which is designed to ensure we improve our services in ways that associates want.

Yours sincerely,

Dame Yve Buckland

Chair, Consumer Council for Water

APPENDIX 2: TOPIC GUIDE FOR DEPTH INTERVIEWS

JN: 07/308

Stakeholders Depth Interviews

Topic Guide

June 2007

Introduction

Moderator to introduce herself and explain the study:-

➤ **Background to study**

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

CCWater operates through nine committees in England and a committee for Wales. CcWater came into operation on 1 October 2005.

CCWater's Forward Programme 2007-08 to 2009-10 sets out the projects that will be undertaken during that period.

Current issues facing consumers include above inflation bill rises, service provision and industry performance and changes in environmental legislation.

Since its inception, CcWater has received over 26,000 contacts from consumers and has managed to obtain over half a million pounds in compensation for them between October 2005 and April 2006.

CCWater has commissioned CGA to conduct a research study speaking to its stakeholders to find out their perception of CcWater's work so far related to current trends and issues in the water industry in order to establish a base line which will be used to measure their performance in the future.

➤ **Reassure Respondent**

Explain this is *independent* research.

Respondent has been selected from a list of stakeholders that CcWater has given us and their confidentiality is assured.

No one outside of the immediate project team knows who our respondents are and individual identified responses will *not* be fed back to anyone within CcWater. All results will be combined together for analysis purposes. No individual or anything

that they say can be identified as originating with them so all respondents can feel free to speak very openly.

The research team is not part of CCWater and everything that you say is confidential. The interview is expected to last for around 45 – 60 minutes.

➤ **Tape Recorder**

Explain that the interview will be taped to assist with subsequent analysis and to ensure that moderator can concentrate on what is being said rather than on taking notes. Comments made by participants will not be identified with them by name.

Introduction and Classification

- Ask respondent to describe post – both generally and in relation to CCWater
- How long they have been a stakeholder and the nature of their organisation's relationship to CCWater.

Section 1: Evaluate stakeholder perceptions of CCWater's performance

- How has CCWater engaged with you since their inception?
 - Probe with – what methods, face-to-face, telephone, e-mail, internet,
 - Please give examples if possible
- How good/ bad are their methods of engagement?
- Are you aware of any projects or campaigns that CCWater has been involved with since their inception? Discuss with regard to
 - a. number of projects/ campaigns,
 - b. quality of projects/ campaigns
 - Consumer Annual Tracking Survey
 - Business customers views on competition in the water industry
 - Research into consumer views on fair charging
 - Using Water Wisely
- Are you aware of any consultations undertaken by CCWater since its inception?
- Thinking overall of CCWater do you trust them to be a source of reliable information?
 - If yes/ no – why? Any specific reasons why they are or are not reliable
- How good is CCWater's public profile?
 - Very well known
 - Fairly well known
 - Neither well known or not well known
 - Not well known
 - Not at all well known

-
- Why do you say that?
 - View on whether or not their profile should be made stronger or does it not matter if it is fairly weak
 - Advertising (for info only) – CCWater is on the back of each water bill/ leaflet about CCWater is given to people that get in touch with CCWater and sent out to local libraries and Citizens Advice bureau/ Water in School campaign/ logo on other campaigns . Regional committees do a lot of local work with stands at events, regional phone ins etc
 - Are CCWater’s policies evidence based? – yes/ no/ DK
 - Why do you say that?
 - What do you believe their policy strategy should be – evidence based or not? And what are your reasons for saying that?
 - From your own understanding do you think that CCWater has now established a profile for all consumers in England and Wales? – yes/ no/ DK
 - Why do you say that?
 - Usefulness of consumer profiles and reasons for having them or not having them in place - explore
 - Have you heard of CCWater’s Forward Work Programme – Yes/ no/ DK
 - If no/ DK – show the respondent a copy of the document – do you remember this?
 - If yes – when did you hear about it? What is good/ bad about it?
 - Have you used/ visited the CCWater website? – Yes/ no/ DK
 - If yes – what did you think about it – good points/ bad points/ user friendliness
 - If no/ DK – why not?

Section 2: Collaboration and partnership

- CCWater currently collaborates with a number of organisations – how could CCWater develop these relationships into partnerships?
- What are the advantages/ disadvantages to working in partnership or in working groups?
- How would you recommend that CCWater makes the most of its current relationships and develops new ones?
- Do you think CCWater should share information, research and data with other stakeholder or partner organisations in a formalised way – without compromising data protection and maximising efficiency
- How are decisions made in your organisation when working in partnership with another organisation? PROBE with ‘are they equal partnerships or would one organisation take the lead?’

Section 3: Understanding stakeholder organisations

- We have already discussed how CCWater has engaged with you - how can CCWater **improve** its engagement with you personally, – method and type of information?
- As a CCWater stakeholder, what do you think should be their customer priorities? Please give your top 3
 - 1
 - 2
 - 3

Section 4: Communication

- Are CCWater's communications clear and understandable:-
 - Method i.e. e-mail, leaflet etc
 - Message i.e. language, length of communication etc
- Are the communications sent to the right person? Yes/ no/ DK
 - If no/ DK – why not
 - If yes – is this enough or do they need to be sent elsewhere as well
- What would be the best way of contacting
 - you?
 - Your colleagues?

Section 5: Raising CCWater's profile

- What is your understanding of CCWater's role?
 - Why do you say that?
- How do you rate CCWater on their ability to:-
 - provide information – generally
 - provide information on consumer issues
 - to build up their evidence base
 - contribute to policy based on evidence and/ or research
 - Why do you say that?
- What other positive things do you have to say about CCWater
- What negative things do you have to say about CCWater
 - Why do say that?
- What would you say they are doing well at the moment/ badly at the moment?
 - Why do you say that?
- What would you do to raise CCWater's profile with the following groups:-
 - Consumers
 - Politicians
 - Other stakeholders
 - Media

- Other consumer bodies
- Compared to other consumer bodies – how high is CCWater’s profile? What would raise their profile so that it is considered in the same way as other large, well known consumer groups e.g. Postwatch or Energywatch? Does their profile need to be raised or is it fine where it is? If not mentioned previously by respondent: There has been talk from the DTI that CCWater may be merged with other consumer bodies; Postwatch, Energywatch and National Consumer Council; what is your view on the merger? (note: this may still happen in 2010)
- What other comments would you like to make?
- Have I missed anything that you would like to add?

Please make a note of e-mail address and go through quantitative statements

THANK AND CLOSE

APPENDIX 3: QUANTITATIVE QUESTIONNAIRE

JN: 07/308

Stakeholders Telephone Interviews

July 2007

Introduction

Good morning/ afternoon, my name is xxxx and I am calling from Carol Goldstone Associates (CGA). Could I speak to xxxxx please?

We are conducting some research for the Consumer Council for Water (CCWater) and you should have received a letter from Dame Yve Buckland (Chair of CCWater) informing you about the study.

INT NOTE: If they don't remember the letter or are sure that they have not received it we can send them an electronic copy via e-mail if necessary.

Once the study has been completed we will e-mail all respondents to inform them that the report has been uploaded onto the CCWater website.

The study is part of an important evaluation which will to inform CCWater's strategic plan and decide on the best ways of working with their stakeholders. A key element in that evaluation is a consultation with stakeholders of which this is a part of. The questionnaire takes about 8 minutes to conduct.

➤ *Reassure Respondent*

Please note that this is *independent* research and that you have been selected from a list of stakeholders that CCWater has given us and your confidentiality is assured.

No one outside of the immediate project team knows who our respondents are and individual identified responses will *not* be fed back to anyone within CCWater. All results will be combined together for analysis purposes. No individual or anything that they say can be identified as originating with them so all respondents can feel free to speak very openly.

The research team is not part of CCWater and everything that you say is confidential. The interview is expected to last for around 8 minutes.

Background information

The Consumer Council for Water (CCWater) is the industry watchdog and provides a strong national voice for consumers. CCWater operates through nine committees in England and a committee for Wales and came into operation on 1 October 2005.

Current issues facing consumers include above inflation bill rises, service provision, industry performance and changes in environmental legislation.

Since its inception, CCWater has received over 26,000 contacts from consumers and has managed to obtain £591,176 in compensation for them between October 2005 and April 2006.

Report on: Stakeholders Survey

Prepared for: Consumer Council for Water



CSG/07/308

CCWater has commissioned CGA to conduct this independent research speaking particularly to its stakeholders. The research aims to find out their perceptions of the work CCWater has undertaken to date related to current trends and issues in the water industry, in order to establish a base line which will be used to measure their performance in the future.

Introduction and Classification

Q1. Firstly, can I just confirm that you are, or your organisation is, a stakeholder for CCWater?

PROBE AS PER PRECODE – SINGLE CODE

Yes, I am	1	Go to Q2
Yes, my organisation is	2	Go to Q1a
No, I am not a stakeholder	3	Ask for a referral
No, my organisation is not a stakeholder	4	Ask for a referral
(Don't know/ refused)	5	Thank & close

Q1a. Are you the right person to speak to about CCWater?

PROBE AS PER PRECODE – SINGLE CODE

Yes, I am	1	Go to Q2
No, I am not	2	Ask for a referral
(Don't know/ refused)	3	Thank & close

Q3. What is your (or your organisation's) relationship with CCWater?

PROBE FULLY FOR RELATIONSHIP – MULTI CODE

Advisory	1
Collaborative	2
Policy Development	3
Strategic planning/development	4
Consumer focussed	5
Sponsor	6
Other (please specify)	7
(Don't know)	8

Q4. How well do you know CCWater?

READ OUT – SINGLE CODE

Very well	1
Fairly well	2
Neither	3
Not very well.....	4
Not at all well.....	5
(Don't know).....	6

Q5. For what reasons has CCWater engaged with you since their inception?

PROBE AS PER PRECODE – MULTI CODE

Strategic Development	
Advisory	1
Steering committee	2
Joint working	3
One-off consultation	4
On-going consultation.....	5
Training.....	6
Conference	7
Seminar	8
Other (please specify).....	9
(Don't know).....	10

Q6. How do you perceive your access to CCWater? Is it at:

SINGLE CODE – READ OUT

The right level or tone	1
In the right format.....	2
Yes, all of the time	1
Yes, some of the time	2
No, never.....	3
(Don't know).....	4

Q7 How would you (or your organisation) prefer to engage with CCWater?

PROBE FULLY - MULTI CODE

Face-to-face.....	1
Working party	2
Telephone.....	3
Post – personal letter.....	4
Post – general letter/ flyer etc	5
E-mail – personal.....	6
E-mail – general	7
Website	8
Other (please specify).....	9
(Don't know).....	10

Q8. What CCWater projects or campaigns are you or your organisation aware of?

PROBE AS PER PRECODE – MULTI CODE

Using Water Wisely.....	1
Water on Tap.....	2
Value for money.....	3
Flush and go/Cleaning up.....	4
Consumer rights and Responsibilities.....	5
Right first time	6
Forward Work Programme issues.....	7
Other (please specify).....	8
(Don't know).....	9

Q9. How good is CCWater's profile?

READ OUT – SINGLE CODE

Very well known.....	1	Go to Q10
Fairly well known.....	2	Go to Q10
Neither well known or not well known	3	Go to Q9a
Not well known	4	Go to Q9a
Not at all well known	5	Go to Q9a

Q9a. How could it be improved?

It doesn't need to be improved	1
It is already at the right level.....	2
Shouldn't pay for advertising	3
Become more prominent through free advertising	4
Be more media savvy.....	5
Use the water companies in order to promote themselves	6
Put some education programmes through schools etc.....	7
PR09 needs to be more in the public eye	8
National level is very good.....	9
Regional level is very good	10
Other (specify)	11
(Don't know)	12

Q10. Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well

PROBE AS PER PRECODE – CATI TO RANDOMISE STATEMENTS – SINGLE CODE

Efficient	1
Their policies are based on research.....	2
Research orientated.....	3
Established a profile or segmented the market for all consumers in England & Wales	4
Independent	5
Well established	6
Good at information sharing	7
Communications are clear	8
Communications are understandable	9
Excellent at providing information	10
Language used is the right level or tone	11
Providing clear and relevant information on consumer issues.....	12
Increasing their profile amongst different groups	13
Getting their messages across	14
They are a national organisation	15
They are a local/ regional organisation	16

- Q12. Compared to these other regulators and consumer groups how well would you say CCWater is known by the general consumer? (Please note that the first 4 organisations are regulators)

PROBE AS PER PRECODE

Ofwat

Environment Agency

Energywatch

Age Concern

Help the Aged

Postwatch

Which?

Much more well known	1
Slightly more well known.....	2
About the same.....	3
Slightly less well known.....	4
Much less well known	5

- Q12a. The former DTI (now known as the Department for Business, Enterprise and Regulatory Reform) was going to merge CCWater with other consumer bodies; Energywatch, Postwatch and National Consumer Council. Were you aware of this?

SINGLE CODE

Yes.....	1
No.....	2
(Don't know)	3

- Q12b. What do you think about the proposed merger?

MULTI CODE – PROBE FULLY

A good idea to have all the consumer bodies in one place	1
CCWater hasn't really had long enough	2
A bad idea as specialist knowledge will be lost	3
Will lose power/ independence	4
Cost too much.....	5
Is only being done to save money/ reduce costs	6
Other (please specify)	7
(No opinion on this	8
(Don't know)	9

Q12c. Do you see CCWater as a National or Regional body?

SINGLE CODE

- Regional body 1
- National body..... 2
- Both 3
- (Don't know) 4

Q13. Do you have any other comments to make regarding your relationship with CCWater or with their activities?

PROBE FULLY

Q14. I have your e-mail address as xxxxxxxxx (CATI TO INSERT E-MAIL IF AVAILABLE), is that correct?

- Yes..... 1 Thank and close
- No..... 2 Go to Q16a

Q14a What is your e-mail address?

PLEASE ENTER AS RESPONDENT SAYS AND THEN READ IT BACK TO ENSURE IT IS CORRECT

THANK AND CLOSE

