CONSUMER COUNCIL FOR Water

CYNGOR DEFNYDDWYR Dŵr

Customers' experiences of water supply interruptions following the freeze-thaw events of March 2018

Final Report

SYSTRA

On behalf of CCWater

14th June, 2018



Foreword

This research report, produced by SYSTRA and commissioned by the Consumer Council for Water (CCWater), reflects the views of water consumers in England and Wales who were directly affected by the ‘freeze-thaw’ incident which left tens of thousands of households and businesses without a water supply for, in some cases, several days in early March 2018.

March has long been seen as the transition month from winter to spring. The old saying – which dates back to the 17th century - noted that March “comes in like a lion, out like a lamb”, illustrating the likelihood of storms in early days of the month followed by calmer warmer weather later on. A lion doesn’t, however, seem quite apt to describe the early part of March 2018, a snow leopard perhaps being a more appropriate big cat to illustrate the so-called ‘beast from the East’ which hit the UK. Snow is by no means uncommon in March but on this occasion heavy snow driven by gale force winds, followed by a rapid thaw, caused all kinds of problems and inconvenience, not least to water consumers whose supplies were interrupted in parts of both England and Wales.

The UK Government and the regulator in England and Wales, Ofwat, subsequently announced that a review would take place of the water industry’s preparedness and handling of the ‘freeze-thaw’ incident. Ofwat issued a formal request for information and data about the incident to all water companies in England and Wales. CCWater assisted Ofwat in analysing the companies’ information and commissioned this research to gain insights from household and business consumers who were directly affected, including consumers who were particularly vulnerable during the incident. The research findings detailed in this report are also referenced in Ofwat’s review report, which was published and submitted to Ministers on 19 June 2018.

Both the analysis and the research findings highlight not just where the water companies need to do better in relation to incidents of this nature but also examples of good practice. The key themes can be summarised as water companies’ preparedness; consumer and stakeholder communications; provision of alternative supplies for those without water; help for vulnerable consumers; and compensation arrangements for those without water for long periods. With this in mind, it’s worth noting that a quarter of consumers affected by the freeze-thaw incident now have a different opinion of their water company, for either better or worse depending upon how well the company handled the incident. Water companies which manage such incidents well therefore have a big opportunity to improve consumers’ perceptions, whilst companies which don’t handle them well, clearly risk damaging consumers’ perceptions, and potentially not just in the short term.

CCWater is now looking to all water companies in England and Wales to learn lessons from this incident and to implement improvements to how they prepare for and manage future incidents of this nature – something which some but perhaps not all water companies did following previous freeze-thaw incidents in the UK.

Philip Marshall
Deputy Chief Executive Consumer Council for Water,
June 2018



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EXECUTIVE SUMMARY

Research context & purpose

During early March 2018, a period of severely cold weather brought widespread snow and ice across England and Wales. As the thaw started on 3rd March, numerous cases of water companies' pipes bursting were reported across several water company areas, leading to many thousands of homes and businesses losing their water supply, some for several days.

The water companies most severely affected were Affinity Water, Severn Trent, South East Water, Southern Water, South West Water, Thames Water and Welsh Water Dŵr Cymru.

Following a high level of media interest in the story and concern from MPs, Thérèse Coffey, Parliamentary Under Secretary of State at the Department for Environment, Food and Rural Affairs announced a review of the incident. This review is being carried out by Ofwat, and the Consumer Council for Water is informing the review by conducting research to assess customers' experiences. This report documents these experiences, alongside customers' views about the information and emergency water supplies provided by water companies during the mains supply interruptions, and their overall view of their water company following the event. Out of scope were customers who experienced a problem with pipes on their own premises (i.e. customer supply pipes).

Quantitative evidence of customer perceptions was sought from a representative sample[1] of 1,001 affected household consumers and 265 affected non-household customers to ensure that the evidence obtained fairly reflects all those who experienced a supply interruption. Quantitative research participants were recruited via address lists (typically postal sectors where some properties had experienced a supply interruption) provided by each water company, from which telephone numbers could be obtained. Each interview was conducted via telephone and lasted 15 minutes on average.

Qualitative insights were obtained from a spectrum of different types of consumer to provide complementary depth to the quantitative findings – in particular, focus group and in-depth interview discussions provided greater detail and context to customers' experiences and underlying rationale for their reported attitudes. The qualitative research discussions included household customers in vulnerable, and non-vulnerable, circumstances; customers experiencing substantially different durations of interruption; and non-household customers whose operations rely on water for their products and /or services, as well as businesses whose operations are not water-critical.

Key findings – how water companies responded (information & communication)

Almost one in five (19%) household consumers, and almost one in ten (9%) business customers, say they received no communication about the water supply interruption whatsoever (from any source).

Across England and Wales, receipt of water company information was recalled by fewer than three in every five (57%) household consumers and just over half (51%) of non-household customers.

One in three household consumers in Wales, and more than one in four in England, felt it necessary to proactively contact their water company to get information. Almost two in every five affected business customers in England and Wales contacted their water company for information. The most sought-after information for customers concerned the timescales for when the supply would be

[1] within each water company area; and within overall quotas for those affected by an interruption, and those affected by low pressure, discoloured water or disruption caused by mains repair works.

restored; and (with hindsight) details of when and where alternative supplies would be made available. At the time of the interruption, people did not think to ask about alternative supply provision (perhaps because they did not know, or expect, that it would or should be provided, or yet know for how long or how badly they would be affected) but, in this research, they said this was a key piece of information they should have had.

Qualitative evidence suggests that the limited information provided by water companies was not useful, e.g. either it did not give a time for when supply would be restored, or the time could not be relied upon (i.e. turned out to be inaccurate).

The most common, and effective, communication channel for household customers was hearing about it from family and friends (either by 'word-of-mouth' or via specific, informal social media networks in which respondents belonged, e.g. local "Mum's groups" on Facebook). Few customers visited their water company's website or social media channels directly, but rather information was cascaded through other social media channels. The general perception, from the qualitative research, was that if the water company could get authoritative information quickly into the public domain then the community (and a mix of social media) would do the rest.

More than half (51%) of households that do not use the internet received no information from other sources and were, thus, entirely dependent on their water company for information.

Small businesses were especially likely to be left uninformed by their water company. Business customers who are reliant on water for their products and/or services needed to have advance warning of when supply would be restored, so that they could ensure that operations resumed with minimal delay. Many non-household customers felt such information was not provided reliably and in a timely manner.

Areas for improvement for water company communication in future are to:

- provide information more quickly, including through a range of social media (and the water company's own website) to maximise reach;
- have more 'on the ground' company activity – to be inclusive and reach everybody (in particular to inform those consumers who do not use social media/internet);
- better manage non-household customers' and household consumers' needs for information on when the water supply will be restored. (However, household and non-household customers would rather have delayed information than timely, but incorrect, information); and
- provide information confirming the safety of the water (even if discoloured or at a low pressure) once the supply has been restored.

Key findings – how water companies responded (alternative [emergency] supplies of water)

Most (72% household England, 52% household Wales; 74% non-household customers) did not receive any alternative water supplies during the interruption.

Of those that did, in England, most had a long walk, or short drive, to get to alternative water supplies (e.g. bottled water stations). In Wales, there was a fairly even split between recipients having a long walk/short drive, having a short walk, or having bottles of water delivered to their door.



(Just) fewer than half of recipients of alternative water supplies felt that what they were given met their needs entirely.

Where water is critical for their business, the interruption has led to consumers losing earnings. Temporary alternative water supplies did not suffice in many cases indicating widespread disruption to business activities.

Some consumers in vulnerable circumstances[2] received a customised service (i.e. bottled water delivered to their door) that minimised their anxiety and/or inconvenience; however, the vast majority (including some on their water company priority service registers) did not receive a customised service – 93% of vulnerable customers in England and 92% in Wales. Qualitative evidence suggested that where bottled water was delivered, many consumers in vulnerable circumstances received an insufficient number of bottles, often after several days of interruption. Furthermore, water companies' definition of 'vulnerable' is not aligned to consumers' views of who needs additional support during a sustained loss of water supply; the definition should encompass most elderly and also households with young children where the logistics of caring responsibilities mean it is not always easy to leave the house and carry back bottled water.

Rural respondents often received a bottled water station in the centre of the town or village, with information spreading quickly through word-of-mouth. This favoured those who lived near the centres, with those in more remote areas reporting feelings of isolation or of being unable to travel through the snow, in some cases boiling the snow as an alternative source for use around the home, such as flushing the toilet.

Areas for improvement in provision of alternative water supplies in future are:

- sufficient provision so that all consumers' basic requirements can be met - including a more comprehensive register of all consumers in vulnerable circumstances in the water company's supply area;
- improved distribution by having more water stations, more tankers and more at-the-door service;
- clear and timely information about when, and where, alternative supplies will be distributed so that everyone can access their fair share; and
- more effective contingency plans to enable water-critical businesses to continue their operations.

Key findings – the overall customer experience

Customers experienced interruptions in supply ranging from just a few hours to several days; varying considerably across, and within, water company areas. Perceptions (and possibly experience) differed depending on the length of interruption for household consumers and non-household customers. The inconvenience and discomfort caused by the supply interruption was, of course, exacerbated by the inadequate provision of alternative water supplies and the lack of information as to how long the interruption would last.

[2] 'Vulnerable circumstances' is defined here as someone living in the household had a health condition, or needed a constant supply of water, or have a low income, or found it difficult to get out of the house to access bottled water stations set up by companies to help people get by until their water supply service could be resumed



For many customers who experienced an interruption in supply, once the water was restored it was discoloured and/or 'smelly'; whilst others experienced low pressure. This period of discoloured and/or 'smelly' water varied from less than a day to 3 days or more. As there was little or no co-ordinated information on the safety of this water, many boiled it or chose not to drink it – thereby unnecessarily extending the period of inconvenience and worry for customers.

Overall, 78% of household consumers thought that the supply interruption somewhat, or badly, affected their household; and 84% of non-household customers thought the supply interruption somewhat, or badly, affected their business.

Businesses whose operations rely on water experienced serious adverse commercial impacts.

Overall, customers who experienced low pressure and/or roadworks, but did not experience a supply interruption, did not need information as urgently as customers with an interruption; and have not come away with a worse opinion of their water company. In this respect, their views are not unlike those of unaffected customers – whose sympathy is mainly with vulnerable customers, for whom they want the water company to provide fully-customised support.

Key findings – customer compensation

Household awareness of compensation varies considerably from 4% in Severn Trent region to 59% in South East Water region. Overall, 31% of household consumers were aware that they were to receive, or had already received, compensation; and 23% of non-household customers. More than half of all customers who experienced a supply interruption, including those in vulnerable circumstances, were unaware that they were due any compensation.

Amongst the minority of households aware that they were due to receive compensation, the level of compensation has met most expectations – 84% of those aware of the compensation being offered were quite or very satisfied with it. Qualitative evidence suggested that, when customers think more fully about the inconvenience that they and their household have put up with, and the poor levels of information and unfair distribution of water bottles, etc. they conclude that maybe the level of compensation offered is insufficient, after all.

Amongst non-households, there was little qualitative evidence that any loss of earnings had manifested itself into compensation claims, despite many expressing, verbally during the interviews, a desire for compensation for loss of earnings. This is likely to be because they expect such claims to be ignored.

Amongst those customers who have received compensation, the vast majority (91% of household consumers) were satisfied with the method of payment – which typically took the form of a cheque in the post accompanied by a letter, or a credit in the customer's account with no corresponding notification. Qualitative evidence suggests that customers were satisfied that it had not been necessary to 'apply' for compensation as the company processed it automatically.

Key findings – overall view of their water company

Around one in ten household consumers (10%) affected by a supply interruption were somewhat, or much more dissatisfied with their water company than before the event. In contrast, a similar proportion were somewhat, or much, more satisfied with their water company than before the event. This indicates that one in five domestic customers affected by supply interruptions have changed their view of their water company. Given that the water sector is, arguably, a low engagement industry, this suggests that such an event provides water companies with a real opportunity to shine.

There was almost no adverse impact on opinion for water companies amongst customers who experienced solely low pressure or roadworks.

The overall ‘no change’ viewpoint was also expressed in some of the focus groups – namely: Severn Trent, South East and South West Water. However, participants in other supply areas had lowered their opinion of their water company – stating that the compensation received could not outweigh the inconvenience of days without water.

A much larger proportion of non-household customers (24%) were somewhat, or much, more dissatisfied with their water company than before the event, compared with only 3% who were somewhat, or much, more satisfied with their water company. This inclination amongst non-household customers to think more negatively of their water company, compared with household consumers, was particularly the case amongst large water-consuming businesses.

Conclusions

Our evidence suggests that the overall experience of household, and non-household, customers across England and Wales was a negative one. The extent of supply interruption was often several days during which there was little useful information from their water company, or any other source, as to when the supply would be restored, or regarding a schedule for when alternative water supplies would be distributed. For most water-critical businesses, the alternative provision was insufficient to meet their needs and revenue losses were incurred. Most household customers in vulnerable circumstances were given insufficient support by their water company, did not receive a customised service, and so were especially impacted by the event.

Most affected customers were unaware of any compensation, though this varied extensively by water company area. Those customers who had received compensation were satisfied with the level and mechanism of payment (which did not require them to ‘apply’). In general, the compensation was not expected so came as a pleasant surprise; when considered more deeply (as was the case during the focus group discussions), the compensation level did not seem commensurate with all the inconvenience of a supply interruption.

1. INTRODUCTION

1.1 This report

1.1.1 This document provides the results to a recent programme of research carried out by SYSTRA Ltd on behalf of the Consumer Council for Water (CCWater).

1.1.2 CCWater is the consumer watchdog which represents the interests of consumers of water and sewerage services in England and in Wales.

1.2 Research context

1.2.1 The "freeze-thaw" was a weather event which subsequently affected the water supplies of over 360,000 water customers in March 2018, with circa 205,000 water customers being cut off from water for more than four hours. Due to severely cold weather, water infrastructure and/or the ground froze and then thawed rapidly as temperatures rose quickly. As the ice melted, numerous leaks in water mains and pipes became apparent resulting in supply disruption across several water company areas. The disruptions were reported in national media, and a review of how industry responded to the event is being conducted by the regulator, the Water Services Regulation Authority (Ofwat); it will report on its findings to Ministers at the Department for Environment, Food and Rural Affairs on June 19th. CCWater is assisting Ofwat by seeking to understand the customer experience.

1.3 Research aims

1.3.1 The first aim was to identify and explore respondents' experiences of water company service and communications during a loss of water supply during the freeze-thaw. In particular, we wished to focus on:

- Household customers[3];
- Household consumers in vulnerable circumstances; and
- Non-household customers (including where water is critical to operations).

1.3.2 A second aim was to understand which communication channels water companies and customers used, including online materials and more traditional methods of seeking and disseminating information.

1.3.3 The third aim was to identify the extent to which water companies were perceived by customers to have communicated and managed the situation well; and how this could be improved in future.

1.3.4 The customer research needed to be undertaken quickly, within a nine-week period delivering by end of May, so as to provide timely input to Ofwat's overall review in mid-June.

[3] A mix of bill-payers and non bill-payers

1.4 Approach

Overview

1.4.1 We undertook quantitative research to be able to present statistically robust findings of the experience of affected customers. We wanted to segment findings by water supply area, where possible in a statistically robust way, to see how water company performance varied.

1.4.2 We undertook focus groups with affected household customers to gain deeper insight into customer experiences. Additionally, we carried out depth interviews with customers in vulnerable circumstances and businesses to explore how the supply disruptions affected their particular situations.

1.4.3 We combined all the findings into our analysis and reporting, allowing the qualitative research to supplement the findings of the quantitative research.

Qualitative Research

1.4.4 We conducted six focus groups with household respondents in five of the affected water supply areas in order to gather deeper insight into the respondent experience. One of the six groups was a "control" group, whereby unaffected respondents gave their views on the disruption.

1.4.5 Recruitment was carried out by contacting households in areas known to be affected, and inviting in-scope residents to participate in a focus group discussion.

1.4.6 Additionally, respondents found to be in vulnerable circumstances were invited to participate in individual in-depth interviews.

1.4.7 Businesses within known affected areas were contacted, using a commercial database for the geographic areas provided.

1.4.8 A topic guide for the focus groups and depth interviews was designed by SYSTRA and reviewed by CCWater prior to fieldwork commencing, and these are provided in Appendices A to C. After each initial group/interview, the topic guide was reviewed and minor modifications were made to allow the moderator/interviewer to fully explore experiences.

1.4.9 Focus groups, containing a range of ages, genders and socio economic groups (SEG[4]), were held in:

- Streatham (Thames Water; 10 affected participants; and a separate control group of 10 unaffected participants);
- Ashbourne (Severn Trent Water; 5 affected participants plus 4 additional depth interviews to increase insights);
- Jarvis Brook (South East Water; 6 affected participants);
- Exwick (South West Water; 10 affected participants); and
- Blaenau Ffestiniog (Welsh Water; 9 affected participants).

[4] Standard classification of (social) economic status: AB – 'intermediate & Higher Management/Professional'; C1 – Supervisory, or junior, Management/Professional; C2 – Skilled Manual; D – Unskilled Manual; E – Lowest grade worker/dependent on State

1.4.10 We also conducted 15 depth interviews with people in vulnerable circumstances. We defined someone as vulnerable if they: had a health condition requiring constant access to water; mobility issues which would inhibit collection of alternative water supplies; a disability within the household; or were on a very low household income (i.e. less than £10,000 annually) which may limit their ability to access alternative supplies.

1.4.11 We also conducted 10 depth interviews with non-household respondents, to more deeply understand the effects on businesses. Respondents included water critical businesses such as cafés and farms.

1.4.12 We ensured that qualitative respondents had experienced an interruption to their supply as a result of burst mains or problem in the area, and NOT due to an issue with the pipes in their home/premises or land (which is their own responsibility).

1.4.13 The qualitative findings were summarised, with salient points underpinned with verbatim quotes, to complement the quantitative results.

Quantitative Research

1.4.14 Our population of interest was the c. 268,000 household and non-household water users who were affected by the freeze-thaw event in seven key water company areas (75% of all affected customers).

1.4.15 The estimated numbers of affected customers, by area, as provided by Ofwat, are provided in Table 1.

Table 1. Affected customers within each water company, as provided by Ofwat

WATER COMPANY	TOTAL CUSTOMERS AFFECTED	CUSTOMERS AFFECTED FOR MORE THAN 4 HOURS	(TOTAL) HOUSEHOLD CUSTOMERS AFFECTED	(TOTAL) NON-HOUSEHOLD CUSTOMERS AFFECTED
Affinity Water	8,686	6,489	8,224	462
South East Water	26,705	24,747	24,952	1,753
South West Water	15,675	14,626	14,717	754
Welsh Water	29,416	20,951	26,769	2,647
Thames Water	83,229	56,972	80,354	2,875
Severn Trent[5]	93,737	56,767	87,629	6,108
Southern Water	10,998	7,700	10,339	439
Total	268,446	188,252	252,984	15,038

[5] This is higher than reported in the Topline Findings, when Severn Trent estimated only 50-60% had truly been affected. The results tables thus differ at the overall weighted level from the Topline Findings, though typically by no more than 3%.

1.4.16 We surveyed a sample of household (HH) consumers (a mix of bill-paying customers and non-bill payers who were affected as consumers), and non-household (NHH) customers (targeted individuals who were suitable representatives of their businesses).

1.4.17 Our quantitative research comprised a sample of 1,001 HH respondents, who took part in a 15 minute telephone interview across the seven most affected water company areas. Each water company provided a sample database that defined postal sectors (and sometimes specific postcodes) of residents in areas where water supplies were disrupted.

1.4.18 We intended to interview an equal number of respondents in each water company area, however due to differing levels of detail on affected areas being provided by each water company there were differences in response rates. The sample information received varied from specific postcodes or streets, to partial postcodes or town names which sometimes only contained a handful of in-scope respondents. This meant we had to over-sample affected respondents in water company areas with more specific postcode or street level detail in order to meet timescales – see Appendix D for details of our sampling and response rates.

1.4.19 The HH sample achieved by water company, and the associated 95% Confidence Intervals (i.e. statistical precision), are provided in Table 2.

Table 2. Sample profile of HH respondents

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Sample Size (n)	1,001	140	126	50	165	131	140	752	249
95% C.I.s*	±3%	±7%	±8%	±12%	±7%	±7%	±7%	±3%	±5%

** Mid-point estimates, rounded to the nearest 1%*

1.4.20 Additionally, we conducted a 15-minute Computer-Assisted Telephone Interview (CATI) survey with a sample of 265 NHH respondents. We conducted interviews with NHH customers across all seven water company areas, but have not reported NHH customer results by company because of small sub-sample sizes. However, where we think it useful to report differences by type of NHH customer, we have done so and reported the applicable sub-sample sizes. In particular, we have sought to explore differences in NHH customer type by large/small users of water and by water-critical/non water-critical business.

1.4.21 A quota was implemented to ensure that around 80% of HH and NHH respondents had experienced an interruption to their supply caused by their water company, and 20% had (only) experienced either a reduction in pressure or congested traffic as a result of mains pipe repairs and their associated roadworks.

1.4.22 We screened-in only those HH and NHH respondents who had experienced an interruption to their supply due to a burst pipe or problem in the road or in the area - and NOT a problem with a pipe in their home or garden/company premises (i.e. a supply pipe, which would be the responsibility of the respondent, or respondent's company).

  

1.4.23 Quantitative questionnaires were designed by SYSTRA and reviewed by CCWater prior to scripting for the telephone interviewers, and these are provided in Appendices E and F.

1.4.24 We piloted the surveys with 25 respondents, which allowed us to check the data for consistency. We also spoke with the interviewers to ensure questions were being understood by respondents.

1.4.25 We undertook the main fieldwork in April and May of 2018, with real-time tabulations of key questions provided to CCWater to enable monitoring of responses.

1.5 Sample Characteristics

1.5.1 Our quantitative sample comprised several consumer segments of particular interest. These include the following HH segments:

- Those who experienced a supply interruption (n=808);
- Those with a health condition reliant upon water (n=180);
- Mobility issues which may make carrying bottled water difficult (n=167);
- Those who rarely or never used the internet (n=246);
- Those with an annual household income of less than £20,000 (n=170);
- Those with someone in the household with an illness or disability that limits daily activities (n=276); and
- Those living in a rural area (n=445).

and NHH segments:

- Large consumers of water (n=43);
- Water critical customers (n=167, the majority of NHH respondents self-identified as being reliant on water).

1.5.2 21% of NHH respondents (n=56) were aware of having a separate water retailer providing them with billing and customer services, as distinct to their wholesale water service provider.

1.5.3 The above segments are not mutually exclusive, i.e. respondents may be in multiple segments.

1.5.4 Other subs-sets are occasionally reported in the subsequent results chapters, where appropriate, including:

- perceived reliability of information received (amongst the 508 HH and 79 NHH respondents who said they had received information);
- type of information sought (amongst the 226 HH and 62 NHH respondents who said they had sought information);
- whether the alternative supplies met their needs (amongst the 283 HH and 51 NHH respondents who said they had received alternative provision);
- whether customised support was provided to customers in vulnerable circumstances (amongst the 207 HH respondents who said they had a health condition, needed constant access to water or had trouble getting out and about to access alternative supplies); and
- whether satisfied with the level of compensation (amongst the 397 HH and 55 NHH respondents who said they were aware of compensation).

1.5.5 Full details of our sampling approach are provided in Appendix D.

1.6 Data Weighting

1.6.1 We weighted our water company samples to reflect the true numbers of affected respondents in England; and we weighted our national samples to reflect total numbers of affected respondents (for any length of time) in England and Wales, as outlined in Table 1.

1.6.2 In the results chapters that follow, we provide HH customer data tables by water company. Findings for England have been derived by applying the above weighting procedure, thus ensuring the aggregated results are representative of affected respondents nationally. We then provide results for Welsh Water, to allow a comparison between England and Wales, before aggregating for a total England & Wales value. This is again weighted by the total number of affected respondents.

1.6.3 For NHH respondents we only provide the weighted England & Wales results, as the smaller sample size does not allow for reliable comparison by supply area.

2. RESULTS - INFORMATION AND COMMUNICATION

2.1 Introduction

2.1.1 This chapter examines respondents' perceptions of the information they received, if any, from their water company, and the timeliness of this information and how it compared with information obtained from other sources.

2.2 Overall quality of water company communication

Recall of water company communications – at a national level

2.2.1 Table 3 presents the proportion of HH, and NHH, respondents experiencing a supply disruption who recalled receiving communication from their water company or retailer (for NHH respondents). A smaller proportion of NHH respondents, than HH respondents, recalled receiving company information during the supply disruption.

Table 3. Proportion of supply interrupted respondents who recalled receiving communication from their water company

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Received information from their water company	57%	51%
Received no information	43%	49%
Base (n)	**808**	**217**

2.2.2 This finding that a significant minority of HH respondents (43%) did not recall receiving any information from their water company was reflected in the focus groups, which highlighted that many respondents had to rely on other sources of information.

> *"There was no communication at all. We couldn't get anything on the telephone, there was very little information available online and when it came to distribution of water Jarvis Brook was left out. We didn't get any water until the day the water came back on." (Male, over 65, C1, Jarvis Brook)*

> *"[The information provided by word-of-mouth] was better than the official channels…there wasn't any information provided by Severn Trent, either warning us of what was going to happen or explaining what had happened at the time." (Male, 36-65, DE, Severn Trent)*

> *"The only source of information for us was, there's a local Jarvis Brook group on Facebook and people would ring and when they rang they'd post it on there and when they'd rung and spoken to someone or something information would be presented on there but that was the only source of information." (Male, 36-65, C1, Jarvis Brook)*

"We had a text saying there could be reduced pressure, after we'd lost water. And again, no follow up from that. We just tried checking the website, and again it didn't really update." (Male, 18-35, C2, Exwick)

"I went online [to Southern Water's website] and found out [what was happening] but we already kind of knew by then." (Salon, Medium water consumption, Southern Water)

2.2.3 Slightly more than half of NHH respondents (51%) could recall receiving some information from their water company.

Communication received by water company – at a company level

2.2.4 Table 4 shows the proportion of those experiencing a supply interruption who received some form of communication from their water company.

Table 4. Proportion of household respondents who received communication, by supply area

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Received info from their water company	57%	71%	58%	*56%*	60%	45%	65%	56%	69%
Received no information	43%	29%	42%	*44%*	40%	55%	35%	44%	31%
Base (n)	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**

**Grey font and italics used to denote a small sub-sample such that only indicative conclusions should be drawn [as is the case for size for Affinity supply area in the table].*

2.2.5 Just fewer than three in every five respondents in England (56%), and two-thirds of HH respondents in Wales who were affected by a supply interruption (69%) received some form of communication from their water company. The percentage of HH respondents who did not recall receiving any communication from their water company varied from 29% (South East Water) to Severn Trent Water (55%).

Water company communications recalled by those in vulnerable circumstances and from rural communities

2.2.6 Table 5 presents the extent to which respondents in key respondent segments, as defined in section 1.5, received communication. Overall across England and Wales, a higher proportion of rural respondents (67%) received some form of communication.

Table 5. Proportion of key household segments who received communication

	ALL	HEALTH CONDITION RELIANT ON WATER	MOBILITY ISSUES	NON-INTERNET USER	LOW INCOME	HOUSEHOLD ILLNESS/ DISABILITY	RURAL
Received info from their water company	57%	55%	53%	55%	61%	53%	67%
Received no information	43%	45%	47%	45%	39%	47%	33%
Base (n)	**808**	**146**	**141**	**205**	**144**	**215**	**376**

2.2.7 Many respondents considered that the lack of information was a significant failing on the company's part; and others who did receive information felt that it simply stated the obvious, and had no value.

"No-one got a warning off Welsh Water – nothing at all." (Male, 36-65, DE, Welsh Water)

"We didn't hear anything from the water company." (Female, over 65, C2, South East Water)

"A total lack of communication." (Male, over 65, C1, South East Water)

"I got a text from Welsh water about 2 to 3 days after – saying 'the water is off'." (Male, 36-65, DE, Welsh Water)

2.2.8 The depth interviews with vulnerable respondents revealed considerable variation in levels of information received.

"We didn't get any notification from [South East Water] whatsoever, [the water] just went off." (Vulnerable, South East Water)

"I've got [South West Water's] app on my phone, so I was able to go on there…[and see information on] the fact that there was no or little water and information as to where I could collect the water from, because they had bottles of water so I was able to go and collect some water so I'd have some fresh water in the flat…[the information on the app] just appeared as 'due to no water or lack of water, please note that bottled water supplies are available at the following locations'." (Vulnerable, South West Water)

"They [Welsh Water] have a list of vulnerable people and I am on the list, and they should have contacted us but they didn't." (Vulnerable, Welsh Water)

Communication received by type of non-household respondent

2.2.9 Table 6 shows whether respondents in key NHH segments received communication.

Table 6. Proportion of key non-household segments who received communication

	ALL	LARGE CONSUMERS	WATER CRITICAL
Received information from their water company	51%	65%	51%
Received no information	49%	35%	49%
Base (n)	**217**	**43**	**167**

2.2.10 These results suggest that large consumers of water were more likely to have received some information from their water company. A similar proportion of water-critical companies received information from their water company as NHH respondents overall.

2.2.11 Of the NHH respondents who were without water and who were aware of having a (separate) water retailer providing billing and customer services, 20% had received information from the retailer, with 46% receiving information only from their water supplier (35% were unsure whether the retailer or water supplier had provided the information).

2.2.12 In the depth interviews, NHH respondents either received no information or were frustrated in the information received.

> *"[Severn Trent] were very poor, they kept saying go and look on the computer but I said I have looked and there are no details on the website, or nothing….they kept saying you could see your job being tracked but it was down, it was no good at all, there was nothing there." (Farm, Medium water consumption, Severn Trent)*

> *"I did receive some information from [South West Water] but I was mithering them a lot, I didn't receive as much as I could have liked…it was basically a phone call to say we're working on it…if I remember rightly there was a number you could ring that had a recorded message, it told me where the nearest bowsers were, which were about a 30-40 minute drive away so it wasn't much use." (Holiday Cottages, Medium water consumption, South West Water)*

Types of information received from water company

2.2.13 Table 7 compares the types of information received by HH and NHH respondents.

Table 7. Proportion of supply-interrupted respondents who received communication

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Timescales for return of water supply	35%	15%
Compensation	26%	8%
Information/updates about the cause of disruption	20%	13%
Information about discoloured water, or low pressure	21%	9%
Confirmation that supplies were restored and safe	17%	12%
Alternative sources of water e.g. bottled, tanker	16%	12%
Disruption caused by road closures	7%	5%
Information on how to register additional support via the company's priority services scheme	5%	4%
Anything else of importance	2%	2%
Base (n)	**807**	**217**

2.2.14 NHH respondents generally recalled receiving less information of any type than HH respondents.

2.2.15 Table 8 presents the types of information HH respondents recalled receiving in each of the supply areas.

Table 8. Proportion of household respondents who received different types of communication

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Timescales for return of water supply	35%	45%	46%	*41%*	28%	29%	34%	32%	57%
Compensation	26%	47%	11%	*26%*	42%	7%	47%	27%	24%
Information/updates about the cause of disruption	20%	21%	22%	*29%*	14%	18%	21%	18%	38%
Information on discoloured water/low pressure	21%	22%	24%	*21%*	11%	24%	15%	18%	43%
Confirmation supplies were restored and safe	17%	19%	17%	*26%*	13%	17%	16%	16%	23%
Alternative sources of water	16%	23%	16%	*9%*	15%	14%	16%	16%	21%
Disruption from road closures	7%	12%	6%	*12%*	5%	8%	2%	7%	5%
Information on … company's priority services scheme	5%	6%	4%	*12%*	4%	5%	9%	5%	6%
Anything else	2%	3%	1%	*0%*	3%	2%	2%	2%	1%
Base (n)	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**

2.2.16 More than half of Welsh Water respondents, and a significant minority of respondents in England, were given information on timing for the return of supply by their water company. The other most common subjects were information/updates on the cause of the disruption and compensation.

Respondent views on communication received from their water company

2.2.17 Around half of respondents who received information from their water company considered that it had been dispensed quite, or very, quickly; whilst the other half felt the information was delivered too late.

2.2.18 Table 9 presents how reliable respondents found the information provided.

Table 9. Reliability of information (when received)

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Very reliable	34%	11%
Quite reliable	36%	54%
neither reliable nor unreliable	14%	27%
Quite unreliable	9%	1%
Very unreliable	7%	17%
Base (n)	**508**	**79**

2.2.19 The majority of respondents receiving information from their water company (and other sources) considered it to be reliable, i.e. there was no reason to doubt the information but, in many cases, there was little information of real use.

2.2.20 Table 10 presents how reliable HH respondents found the information, by water company.

Table 10. Reliability of information (when received) from household respondents by water area

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Very reliable	34%	24%	32%	*32%*	15%	*50%*	41%	32%	45%
Quite reliable	36%	54%	31%	*42%*	34%	*34%*	32%	36%	34%
neither reliable nor unreliable	14%	13%	15%	*5%*	20%	*13%*	14%	15%	7%
Quite unreliable	9%	6%	18%	*5%*	16%	*3%*	8%	9%	10%
Very unreliable	7%	4%	5%	*16%*	15%	*0%*	5%	7%	4%
Base (n)	**508**	**80**	**62**	***19***	**80**	***38***	**76**	**355**	**153**

Use of the water company's social media

2.2.21 Focus group participants reported little use of their water company's social media channels, mainly due to them not having a Twitter account. Those who did visit their



pages/website found the information was not particularly useful, as it was either too vague or not providing responses that were up to date.

"If you went on Twitter you could see live updates, but what if you're not on Twitter?" (Female, 36-65, C1, Ashbourne)

"There was no communication from them. They said something about Twitter, I don't have Twitter! Why should I have to go onto Twitter to find out information?" (Female, 36-65, B, Streatham)

2.2.22 A few respondents received text messages or telephone messages from their water company, but the information simply stated what they already knew.

"I got a text message but it was about three days after." (Female, 36-65, C1, Ashbourne)

"I got a text from Welsh water about 2 to 3 days after – saying 'the water is off'." (Male, 36-65, DE, Welsh Water)

2.2.23 In the more rural areas, there was a general feeling that the community would 'do the rest' once they had the right information from the company.

2.2.24 Respondents commented on a need for a <u>range of social media channels</u> in addition to traditional forms of communication.

"I think text is a largely effective medium, it crosses many boundaries, but on that initial text there could've been links to the various mediums- so you've got a website which we'll keep up to date…put your Facebook on there, put your Twitter on there, whatever else, to give people the option of whatever they're signed up to, to go and find the same information… Or a phone number…for the older generation that may not have internet access." (Male, 36-65, C1, Exwick)

2.3 Respondents contacting their water company

2.3.1 Table 11 shows a breakdown of who contacted their water company and by which channel.

Table 11. Respondents who contacted their water company or water retailer, by communication channel

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
No - did not contact company/retailer	74%	59%
Yes - by telephone	17%	26%
Yes - by other means	6%	5%
Yes - someone else contacted	4%	14%
Base (n)	**808**	**217**

2.3.2 Over 40% of businesses contacted their water company or retailer during the disruption; and 27% of HHs. This higher level of proactiveness amongst NHH customers could be linked to the earlier finding (Table 4) that business respondents received less information than HHs – 43% of HHs did not recall receiving any information compared to 51% of businesses.

2.3.3 The focus groups and depth interviews found that those respondents who attempted to contact their water company had mixed feelings on the experience.

"The website kept referring us to social media, and that was completely useless… and it was painful getting information over the phone… sitting on the phone for a long time waiting for an answer, no real information." (Self-catering holiday accommodation, Medium Consumer, South West Water)

"I rang them up, but it took them a bit of time to come back to me and then they said oh you've got a cut in your supply and we will inform you when we know more and that was it." (Male, 36-65, C2, Jarvis Brook)

"The worst thing, was my wife was on the phone for about 40 minutes, trying to get through to Thames, and it was literally no reply." (Male, 36-65, C1, Streatham)

2.3.4 Table 12 compares the types of information that respondents were seeking when they contacted their water company or retailer.

Table 12. Information sought, by respondent type

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Timescales for return of water supply	51%	73%
Information/updates about the cause of the disruption	36%	48%
Alternative sources of water e.g. bottled, tanker	10%	21%
Information about discoloured water, or low pressure	6%	20%
Compensation	3%	7%
Confirmation that supplies were restored and safe	2%	8%
Disruption caused by road closures	0%	3%
Other	23%	13%
Base (n)	**226**	**62**

**The question above was multiple choice so percentages sum to greater than 100%.*

2.3.5 Timescales and updates to the situation were more frequently sought by businesses. This is likely as a consequence of some HH respondents being able to temporarily use alternative facilities (friends/family etc.), which we observed in the focus groups.

2.3.6 NHH respondents were more likely to seek other types of information as well, indicating that businesses needed insight, and possibly reassurance, on other issues beyond timescales. Within the large ‘Other’ category (23%), HH respondents wished to report a leak to their water company, or to simply enquire what was happening.

2.3.7 In-depth qualitative discussion with HH and NHH participants revealed that, at the time they contacted their company as they didn’t know how long they would be without water for, and didn’t know that alternative water would potentially be provided. Therefore, they did not proactively request information regarding alternative supplies. With hindsight, they felt this is something that companies should have proactively told them about, e.g. where bottled water stations would be located if the water was not back on by a certain time.

2.3.8 Table 13 presents the percentage of HH respondents who contacted their water company, by water company.

Table 13. Households which contacted their water company, by communication channel

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
No	74%	68%	79%	*59%*	66%	83%	82%	74%	67%
Yes (telephone)	17%	23%	16%	*21%*	21%	10%	10%	16%	24%
Yes (other means)	6%	4%	3%	*12%*	8%	5%	5%	6%	5%
Yes (Someone else contacted)	4%	5%	2%	*9%*	5%	2%	3%	4%	5%
Base (n)	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**

2.3.9 In most areas a significant minority of over 20% contacted their water company.

2.3.10 Table 14 shows the type of information HHs were seeking, by water company.

Table 14. Types of Information sought by household respondents

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Timescales for return of water supply	51%	*56%*	*36%*	*57%*	64%	*36%*	*52%*	50%	65%
Information/updates about the cause of the disruption	36%	*33%*	*45%*	*36%*	38%	*36%*	*29%*	36%	28%
Alternative sources of water e.g. bottled, tanker	10%	*17%*	*9%*	*0%*	13%	*7%*	*5%*	10%	9%
Information about discoloured water, or low pressure	6%	*6%*	*9%*	*14%*	9%	*0%*	*19%*	6%	4%
Compensation	3%	*0%*	*5%*	*7%*	4%	*0%*	*14%*	3%	4%
Confirmation that supplies were restored and safe	2%	*3%*	*5%*	*0%*	4%	*0%*	*10%*	2%	1%
Disruption caused by road closures	0%	*0%*	*5%*	*0%*	0%	*0%*	*0%*	0%	0%
Other	23%	*11%*	*32%*	*21%*	20%	*29%*	*19%*	23%	23%
Base (n)	**226**	***36***	***22***	***14***	**45**	***14***	***21***	**152**	**74**

2.3.11 Timescales for return of supply was the most commonly sought information followed by information about the cause of the disruption.

2.3.12 Table 15 presents how quickly water companies provided the information that was requested.

Table 15. Timeliness of water company response to customer contact

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Very quickly	17%	28%
Quite quickly	25%	28%
Neither quickly nor slowly	10%	6%
Quite slowly	10%	8%
Very slowly	10%	11%
Don't know/can't remember	29%	19%
Base (n)	**508**	**79**

2.3.13 A significant minority of respondents (around one in five) felt that their water company responded slowly to their information request.

2.4 Information received from alternative sources of information

2.4.1 We also asked respondents what information they received from alternative sources to their water company, in order to understand how information circulated through affected communities.

2.4.2 Table 16 presents the top alternative sources of information for HH respondents.

Table 16. Proportion of household respondents who received communication from alternative sources

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
From other water customers	37%	44%	47%	*29%*	42%	26%	38%	36%	44%
Radio/Television	29%	47%	20%	*18%*	38%	20%	35%	30%	18%
(Non-water company) social media sources/internet	29%	38%	28%	*41%*	32%	25%	32%	30%	24%
Newspaper	10%	11%	5%	*6%*	14%	8%	9%	10%	6%
At a Community centre or other community venue	4%	6%	5%	*3%*	5%	2%	3%	4%	5%
From your local authority/MP	2%	1%	4%	*0%*	5%	0%	0%	2%	5%
No, none of the above	38%	19%	38%	*44%*	32%	49%	25%	38%	37%
Base (n)	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**

2.4.3 Other water customers are the most common alternative source of information and, from the qualitative research, we understand this to mean friends and family. We also heard cases of using online groups, e.g. groups on Facebook, which we can see evidence of in the quantitative findings. There could be some overlap in these figures, in that an individual commenting on social media is also, by definition, another water customer.

"Streatham mums network…are on Facebook…it's an amazing community forum…very quickly it became obvious that there was a very widespread problem in Streatham…they went to see that councillor…the councillors got involved 'cos they were forced to…it ended up being a bit of a PR disaster for them." (Female, 18-35, B, Streatham)

2.4.4 Radio and television were also cited as a source of communication, though from the focus groups we heard that this information related to other affected areas (such as neighbouring towns and villages), and was, often, too general or not the latest update.

"From what I got from the news, it was portrayed that it was a few hundred homes without water, when in fact… I got the feeling it was thousands of people." (Male, 18-35, B, Streatham)

2.4.5 More than one in three respondents (38% England and 37% Wales) received no information from other sources, and so were totally reliant on their water company for information. This increases to more than half (51%) of non-internet users receiving no information from other sources and being entirely dependent on their water company for information.

2.4.6 Table 17 presents the proportions of supply-interrupted respondents who received no information whatsoever, either from their water company or from alternative sources.

Table 17. Proportions of Respondents who received no communication whatsoever

	ENGLAND	WALES	ENGLAND & WALES
HH Respondents	19%	11%	19%
NHH Respondents	9%	11%	9%

2.4.7 Almost one in five (19%) HH respondents received no communication during the event, compared to one in eleven (9%) NHH respondents. There was no difference in the proportion of respondents who received no information in Wales (11% for both HH and NHH respondents).

2.4.8 This compares to 28% of HH respondents and 33% of NHH respondents who were affected only by low pressure or roadworks, and who received no communication.

2.5 Improvements to communication desired

2.5.1 Respondents commented that the provision of information could have been improved by:

Being provided more quickly and being better resourced to respond to contacts for communication

2.5.2 Many respondents complained at having to wait long time to speak to representatives on the phone.

"Personally I understand when there's problems there's problems, you can't do anything about that, but I just felt they could have been more organised about telling us what was going on." (Female, over 65, C2, Jarvis Brook)

"There was a strong sense, through the whole thing, that they were woefully unprepared for this stuff, you read about all the salaries they're on, and the investment they're putting in every year…it's just unreal, the disjoint." (Female, 18-35, B, Streatham)

Having more 'on the ground' activity, e.g. leaflets and visibility of company staff

2.5.3 Many respondents wanted up-to-date information that was not only available on social media. Where staff were visible these were generally favourably received.

"Radio … leaflets through the door … because not everybody is on Facebook." (Female, 36-65, AB, South East Water)

"They're so not customer-oriented, it's really amazing actually, in this day and age a company can be completely oblivious to their customer base. The fact that they're

only on social media is appalling…who is making these decisions there?" (Female, 18-35, B, Streatham)

"They [Severn Trent staff in the temporary cabins] asked me every day when I walked past if I needed water." (Female, over 65, B, Ashbourne)

Having more accurate information on timescales for the water supply to be restored

2.5.4 Several respondents reported receiving inaccurate information, or information that quickly became outdated in a changing situation.

"They said it would be 'back on tonight' – and you thought 'aah right, nice one'; and then, all of a sudden, they were saying 'the next morning'; and then 'by tea-time'. … Back in the day you used to have a car going around with a mega-phone telling you the water's off – and, now, nothing!" (Male, 36-65, DE, Welsh Water)

"[We were] not really [well informed], nobody knew what was going on, if you contacted [Severn Trent] they kept saying that [the water] would be back on in the next six hours, six hours, six hours, six hours, but once they mended one burst, there was another, so it was just out of everybody's hands…[the return in supply] didn't happen, [the disruption] kept going on, it was three days in the village, it was getting very bad for elderly people." (Café, medium water consumption, Severn Trent)

Informing on the safety of the discoloured water

2.5.5 Some respondents reported concern at whether discoloured water was safe to drink, and were concerned about the lack of information they were provided with.

"There was low pressure when it came back on, and all white - because the water wasn't on properly, they were feeding it with that tanker up the road. And that tanker was not fit for public drinking, and they didn't tell us this, and that's why I got a urinary infection and I was in bed for a week." (Male, 36-65, DE, Welsh Water)



3. RESULTS - ALTERNATIVE WATER SUPPLY

3.1 Introduction

3.1.1 This chapter examines respondents' perceptions of alternative water sources provided by their water company in response to the supply interruption – in particular, whether such supplies were received by respondents and, if so, did these provisions meet respondents' needs.

3.2 Alternative Water supplies received – by Household and Non-Household Respondents nationally

3.2.1 Table 18 shows the proportion of HH, and separately NHH, respondents who received alternative water supplies from their water company during the period when their supply was interrupted. Only those respondents who had been cut-off were asked this question.

Table 18. Percentage of Respondents nationally who received alternative water supplies

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Bottled water	26%	24%
Water bowsers/tanks	1%	2%
Other	1%	0%
Did NOT receive any alternative supplies	72%	74%
Base (n)	**808**	**217**

3.2.2 The majority of HH, and NHH, respondents (more than 70% of each respondent type) received no alternative water supplies. Around one-quarter (24% NHH and 26% HH) received bottled water; and a small proportion (around 2%) received water from bowsers, tankers or other water company source. Even amongst those experiencing a supply interruption of more than 24 hours, the majority (65% of HH respondents and 61% of NHH respondents) did not receive any alternative supplies.

3.2.3 The qualitative research revealed that, in many areas, the provision of alternative water supplies was too little, too late; and that the distribution and availability of those supplies was often done with little information on their whereabouts, and so were often perceived to be unequal and unfair.

3.2.4 Faced with no water supply for hours which stretched into days, and with no reason to believe that their water company was about to provide them with sufficient alternative supplies, many of those affected sought to buy bottled water from their local shops. This led to local, commercial bottled water supplies selling-out quickly, particularly in rural areas, and many focus group participants reported this being the case for all shops within a large radius (sometimes of more than 20 miles in remote areas).



"It went off on Saturday, Rotherfield at the top of the hill had water Sunday morning, Crowborough had water Sunday, Jarvis Brook had nothing." (Male, over 65, C1, Jarvis Brook)

"I didn't know they were giving out water, it turns out it would've been just round the corner from me, but I didn't know that…it would've been useful." (Female, 18-35, B, Exwick)

"We did use some rain water, we have some water butts in the garden." (Female, 36-65, AB, Jarvis Brook)

"I went to Tesco and bought mine." (Male, 36-65 years, C2, Jarvis Brook)

"There were huge queues – there was such a rush, a scramble…for the free water." (Female, Over 65, C1, Streatham)

"We had some water in the end, [Welsh Water] came around with some for us...they supplied the water just down the road for us, late afternoon…you could go down, fill some bottles up with water, and that kept us going, until the water came back…[you filled up] from a tank, about 100 yards down the road, we [took] what we needed, a few bottles, four or five." (Pub, Medium water consumption, Welsh Water)

3.2.5 Evidence from the qualitative research suggests that many who accessed the water supplies only did so if they happened to be near the distribution point, heard information via word-of-mouth or came across the supplies by accident, rather than as a result of effective communication from the water company. This had led to a random uptake of provisions.

"[Welsh Water] didn't tell us that there was bottled water in the village, it was by word-of-mouth…we really wanted to know about [the water station] as soon as [the disruption] started so [Welsh Water] could have told us over the phone [when we rang]. it was a full day before we found out about anything and we could have had water earlier if [Welsh Water] had told us." (Vulnerable, Welsh Water)

"We live in a private walkway, we didn't actually know it was there, my Dad was just going work in the morning and then told me and my step-mum that there's a truck giving out water, so that morning we went down and got some bottles." (Female, 18-35, C2, Exwick)

3.2.6 Respondents in rural locations, especially those in remote locations, had particularly struggled.

"Like I was saying before about hearing on social media – a lot of old people are not on social media so a lot of them were panicking. For the first 48 hours, I was panicking … until I heard that there was somebody [from the local community group] coming around to help people in a 4 x 4 [vehicle as many homes were inaccessible due to thick snow]." (Male, 66+, DE, Welsh Water)

3.2.7 The qualitative feedback revealed that there were many 'winners' and many 'losers' in the quest for obtaining alternative water supplies. Any fore-warning, or information, about when and where alternative supplies would be distributed reached such a small audience that those benefiting from such supplies were mostly those out-and-about in the vicinity of the water stations which, in turn, were usually in the most populated areas; whilst residents further away from town/village centres tended to miss out.

"The wagon arrived with bottled water for everybody, which was absolutely fantastic. That wagon, obviously everybody was in a queue, got all the bottles and the wagon ran out. And within half an hour or so, another wagon turned up. So nobody went without, you know?" (Café, Medium water consumption, Affinity Water)

"We couldn't understand why everybody else got water but Jarvis Brook didn't. We just kept telling them that Jarvis Brook had got no water but they didn't do anything about it." (Female, over 65, C2, Jarvis Brook)

3.3 Alternative supplies received by key household respondent segments

3.3.1 Table 19 reports the proportion of HH respondents who received alternative supplies from their water company, by area.

Table 19. Alternative water supplies received

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Bottled water	26%	33%	50%	*0%*	23%	21%	21%	24%	41%
Water bowsers/tanks	1%	0%	6%	*0%*	1%	0%	1%	1%	4%
Other	1%	3%	2%	*0%*	1%	0%	1%	1%	2%
None of the above	72%	65%	42%	*100%*	75%	79%	78%	74%	52%
Base (n)	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**

3.3.2 South West Water had the highest reported rate of distributing water, with half of interviewed respondents recalling receiving bottled water. None of the HH respondents interviewed within Affinity Water area[6] recalled receiving alternative water.

[6] Though it must be noted that, with a sub-sample of 34 respondents, these quantitative findings must be treated with caution and indicative only of the experience of all Affinity customers affected by a supply interruption

3.3.3 Table 20 shows the proportion who received alternative supplies within particular sub-groups of HH respondents whom CCWater has particular responsibility for and interest in, including those in vulnerable circumstances and those who may have difficulty accessing company information.

Table 20. Receipt of alternative water supplies received by key household segment

	ALL	HEALTH CONDITION RELIANT ON WATER	MOBILITY ISSUES	NON-INTERNET USER	LOW INCOME	HOUSEHOLD ILLNESS/ DISABILITY	RURAL
Bottled water	26%	32%	33%	31%	34%	34%	43%
Water bowsers/tanks	1%	3%	1%	1%	1%	2%	2%
Other	1%	2%	3%	2%	2%	1%	2%
None of the above	72%	64%	64%	66%	63%	63%	53%
Base (n)	**808**	**146**	**141**	**205**	**144**	**215**	**376**

3.3.4 These key segments all received more alternative supplies than HH customers generally, with almost half of affected rural households receiving some form of alternative supply.

3.3.5 In the depth interviews some respondents in vulnerable circumstances did not receive alternative supplies from their water company because they were not on their water company's register, whereas most of those on the register were delivered water. Our sub-sample included respondents who were caring for relatives with serious health conditions, which severely limited their ability to access bottled water supplies.

3.3.6 Some vulnerable respondents were only able to manage as a result of receiving assistance from their friends or family, and otherwise would have been particularly exposed.

"The chaps [from Severn Trent] came around delivering and they even stopped in town and supplied the water to us, so it was not too bad. I've got a daughter, she fetched it down [at the water station in town] and it was young ladies, I think [Severn Trent] have got a list of old people, who they delivered it separate, like…the next-door neighbour he was going to [the delivery people] and they said, 'you're not on the list so you can't have any', which is fair really, if they're only doing the elderly people." (Vulnerable, Severn Trent)

"We didn't even know [South East Water] were giving water out…in Crowborough. It must have been the third or fourth day that I found out that Crowborough had a water [station] and a neighbour's father brought water to us…they had five bottles of water outside our door from our neighbours." (Vulnerable, South East Water)

"We have two households, next door to each other, my in-laws are in the house next to us, they're eighty-nine and they can't get out and about, and the only reason they had any bottled water was because I went and got it for them. Nobody checked to see if they had water, they are very vulnerable, they have a social care package from the council." (Vulnerable, Thames Water)

"[The water stations] were at designated places, around the area, luckily I had a car, otherwise I wouldn't have been able to get [the bottled water]. I did manage to get one load [of water] and my friend grabbed a pack for me another time [because] it's very hard for me to get out, caring for my mother…on the particular times when my friends told me, 'well, the water stations up there this morning', I couldn't have got up there." (Vulnerable, Southern Water)

3.4 Alternative supplies received by key non-household respondent segments

3.4.1 Table 21 details the extent to which different types of NHH respondent received alternative water supplies from their water company.

Table 21. Alternative water supplies received by key household segment

	ALL	LARGE CONSUMERS	WATER CRITICAL
Bottled water	24%	16%	22%
Water bowsers/tanks	2%	7%	3%
Other	0%	0%	1%
None of the above	74%	77%	74%
Base (n)	**217**	**43**	**167**

3.4.2 Almost three quarters of businesses who self-defined as being water critical did not receive alternative water supplies, implying a widespread disruption to business activities.

3.4.3 Large water consumers and water critical businesses were more likely to have received alternative supplies in the form of bowsers or tanks, compared with other NHH respondents.

3.4.4 In the depth interviews, businesses discussed making use of water supplies where they were convenient, or having to find alternative approaches if the water company-provided alternative supplies were too far away. The farms, in particular, struggled for alternative supplies.

"It was quicker to go to Asda or whatever and buy bottled water [rather than go to the bowser]. It was much easier. It wasn't on my list of things I would like to do but it had to be done." (Holiday Cottages, Medium water consumption, South West Water)

"If you went to Ashbourne, you could collect [bottled water] but we're probably 4-5 miles from Ashbourne and you had to go down to get it…it was alright, it was there from 7 in the morning till 10 at night." (Café, Medium water consumption, Severn Trent)

"I couldn't get down [to the water station] until half eight [in the evening], but, they only let you have two packs of six [water bottles]. Bottles of water like that doesn't go very far, does it really. It was a waste of time for the farm because that was just

for household really…a bottle of water goes nowhere for the cows, milking, or washing out or anything." (Farm, Medium water consumption, Severn Trent)

3.5 Location of alternative supplies

3.5.1 As detailed in Table 22, of those respondents who received alternative supplies, around half of respondents had to make a long walk, or short drive, to access supplies.

Table 22. Locations of alternative water supplies

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Had to do a long walk or short drive	49%	*59%*	32%	-	*63%*	*44%*	*44%*	52%	28%
Had to do a short walk	16%	*11%*	46%	-	*16%*	*11%*	*16%*	15%	24%
Delivered to the door	16%	*14%*	8%	-	*13%*	*17%*	*16%*	14%	28%
Other	19%	*16%*	14%	-	*9%*	*28%*	*24%*	19%	20%
Base (n)	**271**	***37***	**59**	**0**	***32***	***18***	***25***	**171**	**100**

3.5.2 Many focus group respondents felt that the distribution points were too far away to access. It was noted that alternative supplies of water were heavy and so those on foot would be limited in their ability to carry more than a small supply. There was also congestion at some distribution sites noted.

"It must be over a mile. Single parent of four, lady, going down there, how the hell is she going to carry that water back?" (Male, 18-35, B, Streatham)

"The least they could have done was put a bowser in the village…that would have helped…they were a very long way away, it would have taken me the best part of an hour to drive to the bowser and come back again." (Holiday Cottages, Medium water consumption, South West Water)

3.5.3 Almost half (46%) of South West respondents had supplies within a short walk of their home.

3.6 Did Water Companies' alternative supplies meet their customers' needs?

3.6.1 Table 23 reports the extent to which respondents' needs were met by the alternative water supplies provided by their water company (the percentages are of the subset who received any alternative supplies).

Table 23. Whether alternative supplies met respondents' needs [of subset who received alternative supplies]

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
They met my needs entirely	45%	34%
They somewhat met my needs	33%	20%
They did not meet my needs	22%	47%
Base (n)	**283**	**51**
Did not Receive Supplies	525	166

3.6.2 The majority (78%) of HH respondents who received alternative supplies reported that the alternative supplies met their needs, either fully or somewhat; whereas almost half of NHH respondents (47%) felt their needs were not met by the alternative provision.

3.6.3 Table 24 shows the extent to which HH respondents' needs were met, by water supply area.

Table 24. Whether alternative supplies met household respondents' needs [of subset who received alternative supplies]

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
They met my needs entirely	45%	40%	43%	-	*33%*	*56%*	*58%*	45%	47%
They somewhat met my needs	33%	53%	44%	-	*42%*	*17%*	*38%*	33%	31%
They did not meet my needs	22%	8%	13%	-	*24%*	*28%*	*4%*	22%	22%
Base (n)	**283**	**40**	**61**	**0**	***33***	***18***	***26***	**178**	**105**

3.6.4 We see some variance into how well the alternative supplies met respondent needs, with only 4% of Southern Water respondents reporting that the supplies were insufficient to meet their needs (though we note a small sample size upon which this is based).

3.7 Respondents in vulnerable circumstances

3.7.1 Table 25 shows that most respondents (more than 90%), who self-identified that they were in a vulnerable circumstance, received no customised support.

Table 25. Respondents in vulnerable circumstances - Was customised support from water company received

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Yes	7%	*15%*	*10%*	*0%*	*6%*	*6%*	*0%*	7%	8%
No	93%	*85%*	*90%*	*100%*	*94%*	*94%*	*100%*	93%	92%
Base (n)	**207**	***26***	***31***	***8***	***35***	***17***	***28***	**145**	**62**

3.7.2 This was reflected in the depth interviews and focus groups, where there were several cases of people in vulnerable circumstances not being supported.

"They [Welsh Water] have a list of vulnerable people and I am on the list, and they should have contacted us but they didn't. And when I contacted them, they said they would 'try to get water to you as fast as we can' [which was two days]". (Male, 35-65, DE, Welsh Water)

"I think the looking out for the vulnerable people in our area, that's shocking…we had a lady in our area in a wheelchair, I think she's got MS or something, she had nobody…so for her to be without water without an offer of somebody coming and delivering water, is shocking". (Male, 18-35, B, Thames Water)

"None whatsoever, I didn't get any bottled water, there was nothing whatsoever. I never had no contact at all… [how could you have been contacted?] by phone or if somebody comes to the house, that's all I could have had." (Vulnerable, Severn Trent)

3.7.3 Where possible, respondents with greatest need for water moved to alternative locations where there was water – i.e. they sorted themselves out.

"I'm pregnant, so we just weren't gonna stick around, but we were in a fortunate condition that we could to my family." (Female, 21-35, B, Streatham)

"My flatmate, he has Crohn's disease, and obviously he needs a working bathroom in order to keep himself clean…he went back to his parent's house…he couldn't stay there." (Male, 21-35, B, Streatham)

3.7.4 Table 26 shows the extent to which the needs of the minority of respondents in vulnerable circumstances who received alternative supplies were met.

Table 26. Whether alternative supplies met vulnerable respondents' needs

	RESPONDENTS IN VULNERABLE CIRCUMSTANCES (ENGLAND & WALES)
They met my needs entirely	33%
They somewhat met my needs	52%
They did not meet my needs	15%
Base (n)	**78**
Did not receive supplies	129

3.7.5 Almost one-sixth (15%) of such respondents' needs were not met by the supplies; whilst more than half (129/129+78 = 62%[7]) who identified their household as containing someone with a health condition relying upon water, or mobility issues, did not receive alternative water supplies.

3.8 The needs of water critical businesses

3.8.1 We also examined the needs of businesses who identified themselves as unable to carry out their business activities without water. Table 27 shows the extent to which water-critical businesses' needs were met by the alternative water supplies.

Table 27. Whether alternative supplies met water-critical non-household respondents' needs

	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
They met my needs entirely	27%
They somewhat met my needs	26%
They did not meet my needs	47%
Base (n)	**51**
Did not receive supplies	124

3.8.2 Less than one-third of water-critical businesses' needs were met entirely, and 71% (124/124+51) water critical businesses received no alternative supplies. In some circumstances this led to significant consequences for some businesses - for example, livestock perishing or reducing output.

[7] i.e. the number of consumers in vulnerable circumstances who answered this question was 129+78 = 207, of which 129 [62%] did not receive any alternative supplies, implying that 62% of all consumers in vulnerable circumstances received no alternative supplies during the interruption.



"Dairy cattle consume a large amount of water, at least 100 litres a day, because they are producing milk…so not only does the loss of water put the animal in danger, but, it then also has a knock on effect…they stop producing the same amount of milk and you can't get that supply back up again, once a cow has dropped its milk, that's it, you're stuck, they don't come back up until the next calf…so it had a huge detriment to our business." (Farm, High water consumption, Severn Trent)

"[Name of farm] they just sent all the workers down [to the local shop] and bought all the water, because they needed it [for the animals]." (Female, over 65, C1, Ashbourne)

3.8.3 From the depth interviews, we further understood that supplies were hard to come by for some, leading to alternative strategies being deployed, or to feelings of desperation. Some businesses were sent between their retailer and wholesaler, where it was not clear which was going to help.

"I must have phoned [Severn Trent] about four times, initially to report that our water supply had gone off, and then when we realised it wasn't coming on anytime soon, it was in desperation for water bowsers, and then [I called] twice more practically begging and pleading for water bowsers to be delivered and it was just a flat no. I tried it both through Water Plus and through Severn Trent and whoever you spoke to, they each said try the other one." (Farm, High water consumption, Severn Trent)

"They [South East Water] also provided large volumes of bottled water, literally had lorries coming in piled up with it, into a central point in the village so that everyone could go and collect. But, obviously, that was largely for residential customers and I think that was absolutely inadequate from a commercial perspective for us, which is why we had to organise our own water supply." (Pub, Medium water consumption, South East Water)

4. RESULTS - RESPONDENT EXPERIENCE

4.1 Introduction

4.1.1 This chapter explores the experience of respondents throughout the period of disruption. It presents a review of respondent experiences as a whole, and also explores how badly key groups of interests were affected.

4.2 Length of water disruptions experienced by respondents

4.2.1 Table 28 shows the average (mean) amount of time, in days, that respondents who experienced a supply interruption perceived they were cut off for. We also provide a distribution, in terms of the percentage which experienced a supply interruption by key thresholds, from less than 4 hours to more than 2 days.

Table 28. Perceived average length of supply interruption – by HH & NHH respondents (days)

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
HH consumers									
% less than or equal 4 hours	13%	6%	4%	*3%*	7%	23%	11%	13%	13%
% more than 4, but less than or equal to 12 hours	16%	12%	8%	*18%*	10%	24%	25%	16%	17%
% more than 12, but less than or equal to 24 hours	18%	12%	11%	*38%*	10%	27%	32%	19%	12%
% more than 24, but less than or equal to 48 hours	18%	24%	20%	*15%*	20%	14%	14%	18%	19%
% over 48 hours	35%	46%	58%	*26%*	53%	12%	19%	34%	40%
Average days (HH)	**2.1**	**2.4**	**2.8**	***2.5***	**3.2**	**1.1**	**1.7**	**2.2**	**2.2**
n	**808**	**113**	**106**	***34***	**133**	**84**	**117**	**587**	**221**
NHH customers									
% less than or equal 4 hours	14%	*22%*	*10%*	*20%*	*19%*	*8%*	28%	14%	*17%*
% more than 4, but less than or equal to 12 hours	10%	*5%*	*19%*	*40%*	*8%*	*11%*	14%	11%	*6%*
% more than 12, but less than or equal to 24 hours	21%	*19%*	*24%*	*10%*	*19%*	*24%*	30%	22%	*14%*
% more than 24, but less than or equal to 48 hours	21%	*8%*	*24%*	*10%*	*12%*	*27%*	20%	20%	*25%*
% over 48 hours	34%	*46%*	*24%*	*20%*	*42%*	*30%*	8%	33%	*39%*
Average days (NHH)	**2.6**	***3.1***	***2.1****	***1.2****	***2.9****	***2.5***	**1.2**	**2.6**	***2.7***
n	**217**	***37***	***21***	***10***	***26***	***37***	**50**	**181**	***36***

**Based on small sample sizes (particularly if less than 25) and should be treated with caution*

4.2.2 There was some variation in length of time that supplies were cut off for, within and across water company areas, with Severn Trent HH respondents reporting being without water for around a day, whilst Thames Water HHs reported that their interruption lasted more than 3 days, on average.

4.2.3 This variation was also evident in the focus group discussions, where some (e.g. within Thames) were without water for up to a week, whereas individuals in some groups said they were only cut-off for a few hours.

> *"Everyone's house in Jarvis Brook was [affected]. We was all affected, it was off for four days." (Male, over 65, C1, Jarvis Brook)*

> *"We were properly without water for five days. We spent our time driving between here and Kingston where my husband's parents live." (Female, 18-35, B, Streatham)*

4.2.4 Loss of business was keenly felt in the qualitative research, which mirrored the quantitative finding that 74% of water-critical businesses did not receive alternative water supplies. The effect of this was seen in the disruption of business activities, affecting income in many cases:

> *"We're talking high-hundreds, maybe a couple of thousand, in trade they lost out on … We have rates to pay, we have rent to pay, those couple of days could make all the difference to a trader…I don't believe Thames Water have been sanctioned nowhere near enough by the government or the powers that be." (Male, 18-35, B, Streatham)*

4.3 How badly respondents were affected

4.3.1 We asked respondents how badly they felt they had been affected by the supply interruptions. Table 29 presents the responses.

Table 29. Perceived impact amongst household/businesses experiencing an interruption

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
My household/business was badly affected	26%	48%
My household/business was somewhat affected	52%	36%
My household/business was not affected	23%	15%
Base (n)	**808**	**217**

4.3.2 NHH respondents were more severely impacted (48%) than HH respondents (26%), whereas HH respondents tended to report being "somewhat" affected. This was reflected in the qualitative research, where HH respondents generally suggested that they were able to "get by" if they could access alternative water supplies or go to alternative locations (e.g. family) in unaffected areas.

4.3.3 Respondents who said their household was badly affected referenced the inability to use toilets or to wash as the main drivers for the negative impact on them, since drinking water could be substituted with other items such as milk or soft drinks.



"We're a house of five who couldn't flush the toilet." (Male, 36-65, C1, Jarvis Brook)

4.3.4 For the badly affected NHHs, having to close (and hence suffer loss of earnings) was the worst possible commercial situation.

"I think it cost us about £1,000." (Self-catering holiday accommodation, Medium water consumption, South West Water)

4.3.5 Further investigation suggested that perceptions of how badly their household was affected was influenced by duration of interruption – with 35% of those HH respondents who experienced an interruption of more than 12 hrs considering themselves to have been badly affected compared with just 5% of those who experienced an interruption lasting 12 hours or less. There was no correlation between household respondents' perceptions and whether information, or alternative supplies, had been received.

4.4 How badly different types of households were affected

4.4.1 Table 30 shows how badly each key HH segment was affected.

Table 30. Alternative water supplies received by key household segment

	ALL	HEALTH CONDITION RELIANT ON WATER	MOBILITY ISSUES	NON-INTERNET USER	LOW INCOME	HOUSEHOLD ILLNESS/ DISABILITY	RURAL
My household was badly affected	26%	40%	36%	20%	23%	30%	28%
My household was somewhat affected	52%	46%	46%	41%	49%	48%	52%
My household was not affected	23%	14%	18%	38%	28%	21%	20%
Base (n)	**808**	**146**	**141**	**205**	**144**	**215**	**376**

4.4.2 Those with health conditions and mobility issues were more badly affected than anyone else.

4.4.3 Some rural respondents who were affected experienced difficulties in accessing bottled water in the shops within reach of their home, and some had taken to boiling snow as a source of alternative water supply for use around the home (e.g. flushing the toilet).

"People were going to Llandudno Asda and Tesco, and they sold out of water – and that's nearly 30 miles away." (Male, 35-65, DE, Welsh Water)

"At the time [of the stoppage] we had a lot of snow up here which, in a way, was of benefit as a lot of people were getting that snow, boiling it and putting it in their toilets." (Male, 35-65, DE, Welsh Water)

4.4.4 In the depth interviews, respondents in vulnerable circumstances had been badly affected, although some had managed as a result of delivery of water from friends.

Where the water company had delivered water, this had helped respondents manage the impact.

"I suffer with MS as well…I've got trouble with my back end, I have to keep going to the toilet, that was a bit of a nightmare, the flushing the toilet." (Vulnerable, Severn Trent)

"My mother, she's 90 and she's got dementia, and it was just constant, with my 7-year-old as well, wanting drinks all the time, it was a bit of a nightmare...she didn't really understand what was going on, to be honest, it was all put on me really, the pressure. Nothing really changed about her, but I don't like change, and to have something like that happen, it messed me up. I just tried to do, whatever I needed to do, I prepared everything before I needed to wash her, and everything, so I had to think ahead before I had to care for her." (Vulnerable, Southern Water)

"I've got leukaemia, etc, but I don't think the water did effect [this] at all…it had no impact on [my health] whatsoever…with me, because I've had breast cancer three times, [the medication I'm on], to keep the breast cancer at bay, it causes brittle bones so the actual heavy carrying, if I hadn't got friends here, I wouldn't be able to do that, if I was here on my own, because I couldn't carry [the water] up a slope…if I had been alone, I'd of probably had to drive to Porthmadog to collect water from the tank thing." (Vulnerable, Welsh Water)

"I didn't have any [negative impact] 'cos as I say, they delivered me bottled water the following day, I think it was five deliveries… I got a phone call saying I'd been on the list and I would receive water within so many hours…it was before the water went off." (Vulnerable, South West Water)

4.5 How badly different types of non-households were affected

4.5.1 Table 31 shows how badly each key NHH segment was affected.

Table 31. Alternative water supplies received by key non-household segment

	ALL	LARGE CONSUMERS	WATER CRITICAL
My business was badly affected	48%	65%	53%
My business was somewhat affected	36%	28%	36%
My business was not affected	15%	7%	11%
Base (n)	**217**	**43**	**167**

4.5.2 Respondents who reported that water was critical to their business functions, or they were a large consumer, were much more likely to be badly affected.

"We didn't open the first day, because everything was…what we use the water for – cleaning, everything." (Take-away, Medium water consumption, Severn Trent)

"That day we couldn't work at all. That was the day that lost me a lot of money because obviously I had about £110 in wages and then lost about £300 in takings." (Salon, Medium water consumption, Southern Water)

4.6 Safety concerns of discoloured water

4.6.1 Concern was also expressed about the safety of the (discoloured) water when the water supplies returned, and that there was often information lacking as to whether it was suitable for drinking.

> *"I got tummy ache… they said it was safe to drink!" (Female, 36-65, B, Ashbourne)*

> *"'Cos [the water] was discoloured, I was just like... I'm not gonna touch that 'till it's over - there was nothing to say whether it was okay or not. There wasn't any feedback from South West Water saying 'it's okay, it's just silt.'" (Female, 18-35, C1, Exwick)*

4.7 Effect of length of disruption on the severity of the impact

4.7.1 Table 32 shows how HH customer perceptions of the impact of supply disruption change as the interruption duration increased.

Table 32. Perceived impact amongst household respondents by length of time without water

	1 DAY OR LESS	1.01 TO 3 DAYS	MORE THAN 3 DAYS
My household was badly affected	18%	37%	44%
My household was somewhat affected	52%	49%	48%
My household was not affected	30%	14%	8%
Base (n)	**501**	**205**	**102**

4.7.2 The average interruption duration, for those reporting that their household was unaffected, was around 1 day; whilst, for those reporting that their household was 'badly' affected, the duration was around 3 days, on average.

4.7.3 Table 33 presents how perceptions of impact amongst NHH customers change by the length of time their supply was interrupted for.

Table 33. Perceived impact amongst non-household respondents by length of time without water

	1 DAY OR LESS	1.01 TO 3 DAYS	MORE THAN 3 DAYS
My business was badly affected	43%	41%	*56%*
My business was somewhat affected	39%	39%	*38%*
My business was not affected	18%	20%	*6%*
Base (n)	**134**	**51**	***32***

4.7.4 Again we see that the longer the business was without water, the more they perceived they were affected. However a higher proportion of businesses than households report they were 'badly' affected by a disruption of 1 day or less, reflecting how critical water is to business as usual operations. This was evidenced in the qualitative research:

"We lost a whole day's takings because we had to be closed for one day…we can't operate the dishwashers and you can't open if you haven't got toilets with flushing water." (Café, Medium water consumption, Severn Trent)

4.8 Comparisons with the control group of households/businesses which did not lose supply

4.8.1 Only 7% of respondents whose water supply was not cut off (nor were they affected by low pressure or roadworks) but lived in the vicinity of affected customers, contacted their water company (compared to 30% of respondents who were off-supply).

4.8.2 95% of respondents who did not experience an interrupted water supply reported no change, or a more positive opinion in their water company.

4.8.3 Respondents in the control focus group (in Thames Water) were aware of the issue, via friends, family, work or school connections. Most felt it was just part of life, and individuals should be able to adapt to temporary losses of water. There was little sympathy, or empathy, for affected customers. This seems an interesting finding - showing how little consumers understand their reliance on having a supply of clean water on tap, to the extent that we cannot understand how deeply affecting and disruptive it would be to lose it unless we directly experience it.

4.8.4 Most of these respondents reported no change in opinion of their water company:

"Not really, because… it could have happened to another company - I think it would be exactly the same." (Female, 18-34, B, Streatham)

5. RESULTS - COMPENSATION

5.1 Introduction

5.1.1 This chapter reports the extent to which respondents have received compensation from their water company, and, if so, whether they were satisfied, or dissatisfied, with the amount and payment method.

5.2 Respondents who have received compensation

5.2.1 Table 34 presents the proportion of all affected respondents who have received, or are expecting to receive, compensation.

Table 34. Proportion of respondents who have received compensation

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Yes – received	21%	18%
Yes – in the process of claiming	10%	5%
No	65%	62%
Don't know	4%	16%
Base (n)	**1001**	**265**

5.2.2 Most affected respondents in England and Wales (65%/62%) had not received compensation at the time of the research, some eight weeks after the disruption had taken place. In the focus groups, most of the participants had received compensation, though this could be, in part, due the focus group locations having been chosen in particularly disrupted areas.

"We got a letter after a few weeks saying that because we were off for four days our account was going to be credited with £100." (Male, over 65, C1, Jarvis Brook)

"Yes, they sent a letter round- you didn't have to ask for it. We got £50, I'm assuming it goes on how long you were off for." (Female, 36-65, C1, Ashbourne)

"I wasn't [aware] until today, no." (Male, 18-35, B, Streatham).



5.3 Receipt of compensation from water company

5.3.1 Table 35 shows compensation received by HH respondents by each water company at the time of the research in May 2018 (eight weeks after the period of water supply disruption). We are not aware of how each water company dealt with compensation payments, nor the extent to which different amounts were paid for different levels of affectation.

Table 35. Proportion of household respondents who have received compensation, nationally and by water company

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Yes (received)	21%	31%	25%	26%	27%	2%	41%	19%	41%
Yes (claiming)	10%	28%	2%	6%	19%	2%	14%	11%	1%
No	65%	33%	69%	64%	50%	94%	39%	66%	57%
Don’t know	4%	8%	3%	4%	4%	2%	6%	4%	1%
Base (n)	**1001**	**140**	**126**	**50**	**165**	**131**	**140**	**752**	**249**

5.3.2 Levels of awareness that compensation was or might be received varied considerably across water company areas, from 4% in Severn Trent to 59% in South East Water.

5.3.3 In the focus groups, those who had not (yet) received compensation, but were affected, were (understandably) dissatisfied.

“I read on social media ‘I have just had £75 off Welsh Water’ … so, well, where’s mine?” (Male, 35-65, DE, Welsh Water)

“I didn’t feel like I deserved anything, necessarily, but when I hear that other people got some… then you feel a bit disgruntled.” (Female, 18-35, B, Exwick)

5.4 Receipt of compensation by different types of household respondent

5.4.1 Table 36 shows the proportion of respondents in key HH segments who had received compensation at the time of the research.

Table 36. Receipt of compensation by key household segment

	ALL	HEALTH CONDITION RELIANT ON WATER	MOBILITY ISSUES	NON-INTERNET USER	LOW INCOME	HOUSEHOLD ILLNESS/ DISABILITY	RURAL
Yes – received	21%	27%	24%	28%	31%	24%	36%
Yes – in the process of claiming	10%	11%	10%	8%	6%	9%	12%
No	65%	58%	61%	61%	60%	63%	48%
Don't know	4%	4%	5%	3%	3%	4%	4%
Base (n)	**1001**	**180**	**167**	**246**	**170**	**276**	**445**

5.4.2 Relatively more rural respondents have received compensation.

5.4.3 Several vulnerable respondents in the depth interviews reported receiving compensation, whereas others had not and were annoyed.

"We've had money off [Welsh Water], we found £75 in our bank account from the water board, we didn't know what it was so we rang them and they told us it was compensation for [the water] being off. I think it was quite quick, it was probably within a week…which was brilliant, it was good." (Vulnerable, Welsh Water)

"We got a reduction, which was very good of [Severn Trent] that were, it was issued to me on the 10th of April, it was very good what they give me back, I couldn't really fault it, we was credited of £95, ain't that good?" (Vulnerable, Severn Trent)

"Apparently there's three [compensation schemes], there's one where you get nothing, there's one where [Thames Water] send you a cheque for £30 and there's one where you argue it and they send you a cheque for £150. We're in the first case, they sent us nothing, my in-laws had a cheque for £30 and our neighbours had a cheque for £150. We did go onto the website and register for our in-laws that £30 was not going to be acceptable because I think the criteria was that you got £150 if you had no water for more than 48 hours, and we were well into that category… [we found this out] from a post from one of the local MPs on Facebook, encouraging her constituents to get in touch with her and she would fight for the £150…on their behalf." (Vulnerable, Thames Water)

5.4.4 The issue of perceived fairness of compensation payment level is a delicate one. The above quote, which was echoed in other focus groups, indicates that categorised payments can lead to a perception of unfairness, as the different compensation amounts get communicated between customers in ignorance of the level of the possibly different interruption durations (and associated inconvenience) that may have been experienced by different customers – thereby creating further annoyance for some customers. While equal payments would avoid this issue, such an award may not reflect different levels of inconvenience and/or interruption durations that might have applied to an individual.

5.5 Receipt of compensation by different types of non-household respondent

5.5.1 Table 37 presents the receipt of compensation by key NHH segments

Table 37. Receipt of compensation by key non-household segment

	ALL	LARGE CONSUMERS	WATER CRITICAL
Yes – received	18%	21%	22%
Yes – in the process of claiming	5%	2%	2%
No	62%	53%	62%
Don't know	16%	23%	14%
Base (n)	**265**	**43**	**167**

5.5.2 There was very little difference in compensation payments amongst water-critical, or large water-consuming, businesses compared with other NHH respondents – around a fifth had received compensation (compared to almost double, 37%, of HH respondents). Their expectations for compensation were bespoke, focusing entirely on their unique business circumstances, and extent to which a situation beyond their control had affected their revenues.

"I just got £75 later, the same as every business." (Café, Medium water consumption, Welsh Water)

"All we got off [Severn Trent] was a text apology." (Farm, Medium water consumption, Severn Trent)

"We have heard that people have been compensated but we haven't." (Pub, Medium water consumption, Welsh Water)

"[South East Water] wrote to us, although I had registered my interest with them previously in discussions [on the phone], they then wrote to us and confirmed what they believed was appropriate compensation, but they did very much seem to suggest that this was set for them and it wasn't a decision by them…they were shirking responsibility of the decision on the wholesaler." (Pub, Medium water consumption, South East Water)

5.5.3 Water critical businesses were more aware whether they had, or had not, received compensation. Large consumers were less likely to know if they had received compensation, though this is perhaps due to the role of the person taking part in the interview.

5.6 Satisfaction with the level of compensation received

5.6.1 Respondents who had received compensation stated their satisfaction, or dissatisfaction, at the level of compensation. Table 38 shows the results for this sub-set.

Table 38. Satisfaction at levels of compensation - households and non-households who had received compensation

SATISFACTION AT COMPENSATION LEVEL *(RESPONDENTS WHO RECEIVED COMPENSATION ONLY)*	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES)
Very satisfied	47%	36%
Quite satisfied	37%	26%
Neither satisfied nor dissatisfied	10%	10%
Quite dissatisfied	4%	8%
Very dissatisfied	2%	21%
Base (n)	**397**	**55**

5.6.2 Most respondents who received compensation were quite, or very, satisfied (84% HH and 62% NHH); but a significant minority (6% of HH and 29% of businesses) were dissatisfied.

5.6.3 This aligned with the qualitative findings, as many HH respondents were pleasantly surprised that a payment was made, without them having to file a claim. Some respondents were more tolerant of the situation - expecting a degree of utilities' failure from time to time - and were, thus, not expecting compensation. Some felt the amounts were insufficient considering the amount of time they had been cut off and the inconvenience of having no water. Some concern was expressed where different households received differing amounts.

"You've got to take your hats off to the water company because it took no lobbying or anything to actually get them to act, it was 'we're sorry, this has been a horrible inconvenience' … it was a gesture gratefully received." (Male, 36-65, C1, Jarvis Brook)

"Some of our neighbours…they got £40, some others they complained, further down the road and got £150…I didn't get anything, so what do we do?...Why didn't everyone get compensation, and uniform?" (Female, 36-65, C1, Streatham)

5.6.4 Table 39 provides levels of satisfaction (and dissatisfaction) with compensation level, amongst those receiving compensation, by water company.

Table 39. Satisfaction with compensation level [amongst those aware] by water company

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Very Satisfied	47%	36%	*51%*	*56%*	32%	*60%*	53%	46%	56%
Quite Satisfied	37%	46%	*29%*	*38%*	36%	*40%*	33%	38%	31%
Neither	10%	11%	*17%*	*0%*	21%	*0%*	9%	10%	4%
Quite dissatisfied	4%	5%	*3%*	*%*	7%	*0%*	4%	3%	8%
Very dissatisfied	2%	2%	*0%*	*0%*	5%	*0%*	1%	2%	2%
Base (n)	**397**	**83**	***35***	***16***	**76**	***5***	**78**	**293**	**104**

5.6.5 Satisfaction with the compensation level is high across all water companies. Greatest levels of dissatisfaction are amongst compensation recipients in Thames Water area (12% dissatisfied).

5.6.6 Businesses were much more likely to judge the compensation level to be insufficient (as it seldom covered the loss of earnings the interruptions had caused). Only one business had given consideration to pursuing further damages but had been told to go through their own insurance arrangements.

"[The compensation] did not really make a lot of difference to be honest, it's a nice thing to do but it didn't make a great deal of difference…you're receiving a cheque for £70 which doesn't make up for it really, unless they're going to start paying out thousands of pounds, there's not much they can do to improve it." (Holiday Cottages, Medium water consumption, South West Water)

"That [£75] didn't seem quite enough for a business, especially a café which depends on people coming in for a coffee." (Café, Medium water consumption, Welsh Water)

"The amount of credit we got was effectively almost what we pay, per day, in charge anyway so, to me, that's like, well, we didn't have water for 5 days so we would expect to see that much less on our bill…we were told that if we had greater losses [than the compensation provided] we should look at recovering those through our own insurance…[cost incurred over £1,000]…we've got loses all over the place, realistically, trying to push those back on our insurance is a bit off…[South East Water] should take responsibility for their actions and if they are causing us losses by their actions in their failure to maintain their network then why should I bear the costs." (Pub, Medium water consumption, South East Water)

5.6.7 Table 40 shows the relationship between interruption duration and satisfaction with the compensation.

Table 40. Satisfaction at compensation level for household respondents, by length of time without water

SATISFACTION AT COMPENSATION LEVEL *(RESPONDENTS WHO RECEIVED COMPENSATION ONLY)*	1 DAY OR LESS	1.01 TO 3 DAYS	MORE THAN 3 DAYS
Very satisfied	47%	50%	34%
Quite satisfied	36%	33%	38%
Neither satisfied nor dissatisfied	11%	10%	11%
Quite dissatisfied	4%	5%	13%
Very dissatisfied	1%	3%	5%
Base (n)	**226**	**115**	**56**

5.6.8 There is a slight correlation between satisfaction and duration. But the association is modest, with the majority of respondents experiencing an interruption of more than 3 days still being quite, or very, satisfied with the compensation offered.

5.6.9 The qualitative research suggested that many people were 'satisfied' with the compensation amount simply because they had not expected to receive any. This lack of expectation reflects their experience generally across all markets, that usually service failure does not lead to compensation. But they did think that compensation was deserved, as the inconvenience experienced by their HH/business was considerable.

5.6.10 The focus group in Streatham, where the supply disruption was the longest, saw greatest levels of dissatisfaction with the compensation levels.

> *"They said 'we had problems with air in the pipes and we believe this was the issue, we're gonna give you £150 anyway, it was so defensive, so unable to admit responsibility I thought was disgusting." (Female, 18-35, B, Streatham)*

> *"We're talking high-hundreds, maybe a couple of thousand in trade they lost out on, and to be insulted with a £200 cheque is disgusting, it's disgusting. We have rates to pay, we have rent to pay, those couple of days could make all the difference to a trader…I don't believe Thames Water have been sanctioned nowhere near enough by the government or the powers that be." (Male, 18-35, Business owner, Streatham)*



5.7 Satisfaction with method of compensation payment

5.7.1 Respondents were generally satisfied with the payment methods of compensation (typically either a cheque or credit to the account), as shown in Table 41.

Table 41. Satisfaction with payment method of compensation

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Yes	91%	92%	*97%*	*93%*	76%	*100%*	89%	90%	99%
No	9%	8%	*3%*	*7%*	24%	*0%*	11%	10%	1%
Base (n)	**366**	**77**	***34***	***15***	**67**	***5***	**74**	**272**	**94**

5.8 Comparisons of those who were cut-off and those who were not

5.8.1 In Table 42, we compare satisfaction with compensation levels amongst HH respondents whose water supply was cut off, alongside those who (only) experienced a reduction in water pressure or traffic disruptions.

Table 42. Satisfaction with compensation level

SATISFACTION AT COMPENSATION LEVEL *(RESPONDENTS WHO RECEIVED COMPENSATION ONLY)*	CUT-OFF HOUSEHOLD RESPONDENTS	NOT CUT-OFF HOUSEHOLD RESPONDENTS
Very satisfied	47%	*60%*
Quite satisfied	37%	*28%*
Neither satisfied nor dissatisfied	10%	*12%*
Quite dissatisfied	4%	*0%*
Very dissatisfied	2%	*0%*
Base (n)	**397**	***25***

5.8.2 As one might expect, those not cut-off expressed no dissatisfaction at compensation they received, though we advise caution in the findings due to the low sample size (25).

5.8.3 In the control focus group, respondents suggested that a credit to the account, or simply a large charity donation in lieu of a payment, would be most appropriate for affected individuals.

6. RESULTS - OVERALL RESPONDENT VIEW

6.1 Introduction

6.1.1 The final part of our research asked respondents to state whether their opinion of their water company had changed as a result of the disruption.

6.2 Changes in opinion of the water company

6.2.1 Table 43 reports the extent to which respondents' attitudes towards their water company have changed due to the disruption which followed the freeze-thaw event.

Table 43. Change in respondent opinion of water company/retailer

	HOUSEHOLD RESPONDENTS (ENGLAND & WALES)	NON-HOUSEHOLD RESPONDENTS (ENGLAND & WALES) – WATER COMPANY	NON-HOUSEHOLD RESPONDENTS (ENGLAND) – WATER RETAILER
Much more satisfied	1%	2%	0%
Somewhat more satisfied	8%	1%	0%
No change in opinion	81%	73%	78%
Somewhat more dissatisfied	4%	10%	5%
Much more dissatisfied	6%	14%	16%
Base (n)	**1001**	**265**	**45**

6.2.2 The majority of HH and NHH respondents' opinions (circa 80%) have not changed as a result of disruptions. Moreover, though 10% of HH respondents were more negative about their water company, a similar proportion was more positive.

6.2.3 A larger proportion of around one in four NHH respondents (24%) were more dissatisfied with their water company/retailer, following the disruption.

6.2.4 This broadly aligned with the qualitative research findings, where there was often no change, with some business representatives expressing a reasonable level of tolerance.

"I don't think [my opinion] has changed. I'm not a great fan of utility companies anyway…they haven't given us any significant compensation, it almost doesn't surprise me, it's just big business and not really caring…this is the problem with all utilities, you get the feeling that they don't actually really care." (Pub, Medium water consumption, South East Water)

"The actual people delivering the water and dishing it out, and that side of it, were great, you know, the lads on the ground." (Salon, Medium water consumption, Southern Water)

"It's not that they did it deliberately, or anything like that." (Male, 36-65, C1, South East Water)

6.3 Changes in opinion by water company

6.3.1 There is some variation in attitudes amongst HH respondents when analysed by supply area, as shown in Table 44. Across all water companies, most views have stayed the same.

Table 44. Change in household opinion of water company

	ENGLAND & WALES	SOUTH EAST	SOUTH WEST	AFFINITY	THAMES	SEVERN TRENT	SOUTHERN	ENGLAND	WELSH WATER
Much more satisfied	1%	1%	6%	4%	1%	1%	1%	1%	4%
Somewhat more satisfied	8%	3%	13%	6%	12%	6%	5%	8%	8%
No change in opinion	81%	89%	73%	76%	74%	88%	87%	82%	79%
Somewhat more dissatisfied	4%	4%	4%	6%	2%	4%	2%	3%	5%
Much more dissatisfied	6%	4%	5%	8%	12%	2%	4%	6%	4%
Base (n)	**1001**	**140**	**126**	**50**	**165**	**131**	**140**	**752**	**249**

6.3.2 While most opinions were unchanged, there is still some slight variation between water companies. In particular, almost one in five (19%) of South West respondents were more satisfied, while 14% of Thames respondents were more dissatisfied.

6.3.3 Some results of the qualitative research were quite different, particularly within Thames Water and Welsh Water, where distinctly lower opinions of their water company were expressed. The nature of focus groups – i.e. participation in an extensive discussion, requiring the re-living of the situation - meant that a possibly more critical assessment of company performance was made, compared with the shorter telephone interview more than one month after the disruption.

> *"In this day and age, you'd think they would do a lot better." (Female, 18-35, B, Welsh Water)*
>
> *"It's gone down a bit more. It's very big, but it's not efficient." (Female, Over 65, C1, Streatham)*
>
> *"It has shone a light on how disconnected government is from these big companies. Why haven't they been monitoring this? This company is clearly not doing its job." (Female, 18-35, B, Streatham)*

6.4 Changes in opinion of the water company by key household segment

6.4.1 Table 45 presents the changes in opinion by key HH consumer segment.

Table 45. Changes in opinion of the water company by key household segment

	ALL	HEALTH CONDITION RELIANT ON WATER	MOBILITY ISSUES	NON-INTERNET USER	LOW INCOME	HOUSEHOLD ILLNESS/ DISABILITY	RURAL
Much more satisfied	1%	1%	1%	3%	4%	3%	4%
Somewhat more satisfied	8%	9%	10%	5%	11%	9%	9%
No change in opinion	81%	76%	77%	83%	79%	78%	79%
Somewhat more dissatisfied	4%	4%	2%	5%	4%	5%	4%
Much more dissatisfied	6%	10%	10%	4%	3%	7%	4%
Base (n)	**1001**	**180**	**167**	**246**	**170**	**276**	**445**

6.4.2 Respondents in vulnerable circumstances report relatively higher levels of dissatisfaction with their water company. Low income and rural respondents were more likely to be more satisfied.

6.4.3 Where respondents in vulnerable circumstances felt supported they generally reported higher levels of satisfaction.

"I can't really fault [Severn Trent] because they was bringing me the water and all that, it was there if we wanted it and they even stopped outside delivering." (Vulnerable, Severn Trent)

"They did well by reacting quite quickly, the water was there when they said it was gonna be there, if they ran out of water they said there would be some more in an hour and it was there in an hour, I think, all in all, in my view, they reacted very well." (Vulnerable, South West)

"[Welsh Water] did the best they could, it was just a bad situation, they worked hard, they were here day and night, there were like 20 people and vans around working, it was not like the situation was ignored, they were trying to resolve it as quickly as they could." (Vulnerable, Welsh Water)"

"I think the communication was poor, we had no explanation of what was going on as it was happening, there was very poor support to vulnerable people, not a lot went well." (Vulnerable, Thames Water)



6.5 Changes in opinion of the water company by key non-household segment

6.5.1 Table 46 presents the changes in opinion by key NHH segment.

Table 46. Changes in opinion of the water company by key non-household segment

	ALL	LARGE CONSUMERS	WATER CRITICAL
Much more satisfied	2%	2%	3%
Somewhat more satisfied	1%	0%	1%
No change in opinion	73%	72%	75%
Somewhat more dissatisfied	10%	9%	7%
Much more dissatisfied	14%	16%	13%
Base (n)	**217**	**43**	**167**

6.5.2 Key segments showed similar levels of satisfaction with their water company, and this was also observed in the depth interviews – generally no change but a few instances of increased and decreased satisfaction.

"I don't think [my opinion] has changed. I'm not a great fan of utility companies anyway…they haven't given us any significant compensation, it almost doesn't surprise me, it's just big business and not really caring…this is the problem with all utilities, you get the feeling that they don't actually really care." (Pub, Medium water consumption, South East Water)

"I was quite happy [with Welsh Water], [the water supply disruption] didn't disrupt us terribly because we managed, it could have been worse." (Pub, Medium water consumption, Welsh Water)

"[Welsh Water] coped with the situation extremely well, and they did all that they could. They are probably pretty well organised, they reacted very quickly…they obviously have the right systems in place." (Café, Medium water consumption, Welsh Water)

"[My opinion of Severn Trent] has gone down considerably…I find it pretty disgusting with how they've treated us really." (Farm, High water consumption, Severn Trent)

6.5.3 Table 47 shows how HH respondent opinions change according to the level of disruption experienced - i.e. households that were without water compared to households which did not lose supply.

Table 47. Change in household opinion of water company by level of disruption

	CUT-OFF HOUSEHOLD RESPONDENTS	NOT CUT-OFF HOUSEHOLD RESPONDENTS
Much more satisfied	1%	2%
Somewhat more satisfied	9%	4%
No change in opinion	80%	90%
Somewhat more dissatisfied	4%	3%
Much more dissatisfied	6%	2%
Base (n)	**808**	**193**

6.5.4 Amongst respondents whose supplies were not interrupted, there is a much larger majority of unchanged opinion.

6.5.5 Table 48 contrasts the changes of opinion between NHH respondents whose supplies were, and were not, cut off.

Table 48. Change in non-household opinion of water company by level of disruption

	CUT-OFF NON-HOUSEHOLD RESPONDENTS	NOT CUT-OFF NON-HOUSEHOLD RESPONDENTS
Much more satisfied	3%	0%
Somewhat more satisfied	1%	2%
No change in opinion	74%	90%
Somewhat more dissatisfied	8%	8%
Much more dissatisfied	14%	0%
Base (n)	**217**	**48**

6.5.6 Again, there is a larger majority of unchanged opinion where supplies were not disrupted.

7. CONCLUSIONS

7.1 How water companies communicated with customers, and the effectiveness of the communication

7.1.1 Most household and non-household customers consider the level of information during the mains supply interruption to be poor, and should have been better. A significant minority received no information (from any source) whilst those that did, considered it reliable but felt it was not of value, i.e. the information did not say anything they did not already know and so was of little help. Many customers, non-household customers in particular, contacted their water company (or retailer, for some business customers) but received little new information despite their efforts.

7.1.2 The main piece of information sought was when the supply would be restored. Upon reflection, and once customers realised that alternative supplies were being provided by the water company, customers wanted information about where and when such supplies were to be distributed. The third key piece of information that customers wanted was (immediate) clarification that the restored water was safe to drink, even if it was discoloured or at a low pressure.

7.1.3 The most common communication channels were via other customers – i.e. 'word-of-mouth' mostly from family and friends. Secondly, through social media – typically Facebook, Twitter or a community page; and customers thought that, once information was published on the water company web-page, it was then disseminated effectively by customers via the range of different social media channels.

7.1.4 The use of multi-social media channels for disseminating useful and timely information should be considered by water companies in future. There is also a need for water companies to consider how they will reach non-internet users if there was a similar event in future.

7.2 How the water companies responded with alternative supplies

7.2.1 Most household and non-household customers did NOT receive any alternative supplies, and consider this to be a failure on the part of the water company. Amongst those customers who did receive alternative supplies, (just) fewer than half felt the company's alternative provisions met their needs entirely. Customers were thus left to their own devices – buying alternative supplies from local shops (if they had not run out, sometimes people drove 30 miles to find no bottles available), melting snow or recycling rainwater to flush the toilet – or going without.

7.2.2 Household customers were particularly concerned about the welfare of those in vulnerable circumstances. There were many accounts given in the focus groups of customers helping others with alternative supplies and general checking on their health and wellbeing. Most of the customers in vulnerable circumstances who participated in our research received no customised service from their water company, despite many reporting to be on their company's social register. Water companies need to review the comprehensiveness of their social registers and their procedures for providing alternative supplies (at-the-door) to such groups - if they wish to minimise anxiety and inconvenience for all those in their supply area that may need special assistance in an interruption event.

7.2.3 Rural respondents received deliveries to the centres of their towns or villages, and word spread quickly of these provisions, but more remote residents could be left isolated.

7.2.4 For water-critical businesses, temporary alternative supplies did not suffice with the supply interruption leading to loss of earnings, and other serious consequences (such as death of livestock).

7.3 What was the customers' experience

7.3.1 Most household, and non-household, customers judged that the supply interruption somewhat, or badly, affected their family/business.

7.3.2 Based on customer recall, the average duration that customers were without a water supply was more than 2 days, across most of England and Wales (around 1 day in Severn Trent and Southern Water, and more than 1 week in some areas of Thames Water). This period was defined by: considerable inconvenience having no water; exacerbated by a lack of information about when water would be restored or where/when alternative supplies would be made available. When the supply was restored, many customers experienced discoloured and/or 'smelly' water and did not know whether it was safe to drink or not. So, for some, additional angst and inconvenience (boiling water or continuing to purchase bottle water) continued unnecessarily.

7.4 Compensation

7.4.1 Most of the customers who were aware of the level, and method, of compensation were satisfied with it.

7.4.2 However, most household, and non-household, customers were unaware of any compensation. The level of awareness of compensation (and, quite possibly, the intention to pay compensation) varies considerably across the water company areas. Most customers in vulnerable circumstance are unaware of any compensation due.

7.5 Overall Opinion

7.5.1 Around one-fifth of the domestic customer base affected by interruptions has changed its view of their water company (both upwards and downwards) since the event. Thereby demonstrating the opportunity for water companies to influence their customers' perceptions of them by the quality of their response to such an event.

7.5.2 For affected household customers, in aggregate, opinions of their water company is as before. This is despite household customers considering that they were somewhat, or badly, affected, and indicating that most did NOT receive any useful information nor sufficient, alternative supplies. The fact that this has not led to a worsened overall view of their water company for most customers may reflect society's general acceptance that they have to put up with service failures once in a while (e.g. debacles with trains and on the roads; internet disconnections; and poor service in a range of sectors).

CONSUMER COUNCIL FOR Water

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