WaterVoice Window 5

Summary Report

July 2020

'Water companies and their social purpose'

'Water Mark: Your water company's performance made clear'

'Discussing the quality of your drinking water at home'

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Introducing WaterVoice

This report presents findings generated via WaterVoice, CCW's online community of more than 600 water bill payers aged 18+ across England and Wales, recruited and managed by Ipsos MORI. The activities included in this report were conducted over a period of around one month.

Members of the community were recruited from existing online panels, aiming for representation across all water companies, targeting a balance by gender, age groups and tenure. It is important to note that the profile of community members participating in each individual activity **may not be reflective** of the overall community composition, or the population of bill payers.

WaterVoice has been designed to provide a flexible forum for ongoing conversations with a large group of consumers, allowing for basic surveys, qualitative and deliberative inquiry, meeting the need for fast feedback and a sounding board to pre-test ideas and initiatives. As such, it will complement rather than substitute for slower turn-around, more rigorous ad hoc research projects commissioned by CCW.

Because WaterVoice's consumers are not representative in a statistical way, the findings presented here are **descriptive** and **illustrative**, and **cannot be extrapolated** to all consumers. It is also important to recognise that not all WaterVoice members have taken part in each activity, and that throughout the course of the programme of research activities they will likely have become **more informed**, potentially affecting their views.

We recommend any sharing of findings generated by exercises run via WaterVoice is accompanied by a similar note, aiding interpretation and use.

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Window 5 activities

1
'Water companies and their social purpose'

30 Jun – 15 Jul

2
'Water Mark: Your water company's performance made clear'

15 – 23 Jul

3
'Discussing the quality of your drinking water at home'

22 Jul

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Window 5: Activity types and functionality

‘Water companies and their social purpose’ and ‘Water Mark: Your water company's performance made clear’: sequential board

- **Questions grouped into topics** and posed to participants in a sequential manner – each topic appears after completing the previous.

- **Open visibility** (‘Water companies and their social purpose’) – participants could see all responses before leaving their own.

- **Conditional visibility** (‘Water Mark: Your water company's performance made clear’) – participants could see all responses only after leaving their own.

- **‘Like’ function** – participants were invited to read each other's posts and click ‘like’ to indicate which they most agreed with.

- **Closed questions** (response codes provided) and **open-ended questions** (participants invited to type their response).

‘Discussing the quality of your drinking water at home’: online live chat

- **Small qualitative group discussion** conducted on the community with a pre-selected group of members who were eligible to take part.

- **Questions structured with a topic guide** used by the moderator to lead the discussion.

- **Synchronous discussion** lasting one hour, with all participants and the moderator typing into a dedicated online space).

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Water companies and their social purpose

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Activity aims & questions asked

This activity explored participants' views on the concept of water companies having a 'social contract' or 'social purpose'.

It was conducted as an open sequential board, where participants could see other members' responses before inputting their own, and react to other posts.

Participants were asked questions on the following:

- **Awareness and understanding** of water companies' social contracts or social purpose in general, and what this might involve (before reading a description).

- **Views of the concept** of a social contract for water companies, and participants' detailed understanding of its purpose (after reading a description).

- **Awareness of the specific steps or commitments** that participants' own water companies may be taking to fulfil their social contract.

- **Perceived importance** of water companies having a stated social purpose.

- **Suggestions of the types of measures, commitments or responsibilities** participants think water companies *should* be taking under their social contract.

- **Reactions to Water UK's** pledges with water companies to reinforce the social contract.

- Views on **what should form part of companies' 'usual' operations** (rather than their social contract), and how social contracts should be **funded**.

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Awareness of and initial understanding of 'social contracts'

This activity is about water companies' 'social contracts' – sometimes also referred to as their 'social purpose' or 'social value'. Before today, had you ever heard of this or not? What do you think it means?

- Most **had not heard** of social contracts before: only a couple of participants knew about social contracts in relation to water companies specifically, and a few more were aware of social contracts applied in different sectors.

- Participants' suggestions as to the purpose of a social contract and what it might involve can be grouped into the following broad themes:

  - **Supporting vulnerable consumers, e.g. those with disabilities**

  - **Helping less well off customers with difficulties paying water bills**

  - **Ensuring the public has a reliable supply of clean water**

  - **Protecting the environment and producing water sustainably**

  - **Transparency (i.e. with water bills).**

> "*I have heard of this and have experience of being on a social tariff for water bills because of my low income. I don't think many people know about it or that they are even entitled to apply for it.*"

> "*I've not heard this phrase before, at a guess I'd say it's a form of environmental or sustainable responsibility. So how you give back what you take out and how you're helping the environment and the planet.*"

> "*I've heard something similar and I think it means schemes to help the vulnerable and those who are having difficulty paying for water. I know that my water company keeps a record of disabled customers or elderly who may need extra help if the water is not available, etc.*"

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Perceptions of water companies' social contract

Water companies have a core purpose: providing a reliable, safe supply of drinking water and sewerage services at a reasonable price. In addition, they have a social purpose: to make a positive contribution to society and to protect the environment. This is like Corporate Social Responsibility, which some companies have policies on in order to focus on the social, environmental and economic impacts of their operations and how these can be improved. In the water industry this is also referred to as water companies' social contract, social purpose or social value. What do you think about this idea? Please tell us what springs to mind.

- Participants were generally positive about the idea of social contracts for water companies. They mentioned the importance of **care for the environment, provision of safe and high quality water,** and **giving back to the community.**

- However, some participants had doubts about social contracts, raising concerns about:

  - Whether companies are **sincere** about their social purpose

  - Whether social contracts are simply a **rebrand of existing policies** or measures water companies are already required to take by regulation

  - That they are **unnecessarily complicated** descriptions of basic standards

  - Whether social contacts are a 'marketing gimmick' that does not **translate into action.**

> " *… It would be hard for anyone to think this is a bad idea... But of course positive can be measured in different ways. Are the changes that need to be made small or large, and will the company do anything other than pay lip service to the idea?"*

> " *It is important for big companies like water companies to show how they give back to the world, local communities and how they are changing* [as] *the climate changes."*

> " *I think new words such as social purpose or social value are the new buzz words. They sound like something a company would use to be seen as environmentally friendly."*

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Describing social contracts

Imagine you're explaining the idea of a water company social contract to a friend. In your own words, how would you explain what a social contract means, and what its purpose is?

> *As a utility supplying such a fundamental service, they should be obliged to be socially responsible in everything they do, supplying clean water at a reasonable price and protecting the environment. A social contract makes this explicit but it's not an extra, just an expression of what they are obliged to do."* **(Top rated response by participants)**

> *The social contract means that a company will work to provide a safe, reliable service to its customers, and giving back to the community without a negative impact on the environment. It is a promise to the community, customers and the planet."*

> *It's a big statement which is meant to cover all the commitments a water company has. It is also a bit of a conscience-salving process as people may get upset at paying for a product which, in their view, falls free from the sky but from which money is made for shareholders and (often) foreign owners."*

> *It's the legal requirement to provide safe and environmentally sound water and sewage systems."*

> *It's basic common sense, it is the responsibility of a water company not to kill off its customers or the environment by providing anything other than clean water/sewerage at a reasonable price."*

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Awareness of water companies' social contracts and views on the importance of this

What about your own water company? Can you think of anything it is doing to fulfil its social contract?

Participants considered the following measures may be part of their own water company's social contract:

- Social tariffs for those on state benefits or who cannot afford payments (with reference to South East Water, Severn Trent, South West Water)

- Prioritising vulnerable customers during the lockdown (Southern Water)

- Sending a water saving kit to reduce water use (Anglian Water, South West Water)

- Home checks to establish whether customers need water saving devices (Anglian Water)

- Sending reminders and tips about reducing water waste (Affinity Water, South East Water)

- Water delivery for people who encounter problems (Severn Trent)

- No price increases for 5 years (Welsh Water).

How important is it to you that your water company has a stated social purpose, and why?

- Most participants felt it is important that their water company has a stated social purpose. They explained this makes water companies more **accountable,** with a pledge to be held to, and it makes them more **transparent** and more **trustworthy**.

- Participants who did not consider it important tended to say this was because they **assumed water companies were acting responsibly anyway,** or that they **consider provision of good quality and affordable water supply** to be more important than a social purpose.

> " *I think it is very important that my water company has a stated social purpose. It gives me some reassurance that they are working for the better of the community and planet.*"

> " *It's not really that important to me that they have a stated social purpose as I have always just trusted that they are acting in a socially responsible way anyway, but it is good to know.*"

Suggested actions to fulfil social contracts

What types of specific measures, actions or responsibilities should water companies be taking to fulfil their social contract?

- Key actions mentioned by participants were:
  - **Sending customers information on how to reduce their water consumption**
  - **Supporting low income customers**
  - **Providing discounts or rewards for low water users**
  - **Providing incentives to install water saving equipment like water butts and water meters**
  - **Supporting customers with medical needs**
  - **Ensuring water supply is clean and safe**
  - **Ensuring they are not polluting rivers and lakes, and protecting wildlife**
  - **Working with and supporting water related charities like river and wildlife trusts.**

"
Water companies should send targeted emails to customers suggesting how to reduce water consumption. They should also support the Canal and River Trusts through sponsorship and funding much-needed conservation activities."

"
Small discounts/rebates for all low water users, not just those on state benefits. This would encourage more people to try to lower their water usage."

"
They should be addressing any issues around 'water poverty' as other utilities address issues around the inability of some people to pay for gas and electricity."

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Reactions to Water UK's pledges with water companies

What do you think about Water UK's public interest commitment?

Water UK is a trade association which represents the UK's major water companies.

They have made a number of pledges with water companies to reinforce the social contract within the water industry. Each water company's CEO will lead the work for each of the following goals:

- *champion measures through which water companies can enshrine what it means to operate in the public interest within their business purpose, in line with best practice among leading socially responsible businesses.*
- *Triple the rate of sector-wide leakage reduction by 2030.*
- *Make bills affordable as a minimum for all households whose water and sewerage bills are more than 5% of their disposable income by 2030, and develop a strategy to end water poverty.*
- *Achieve 'net zero' carbon emissions for the sector by 2030.*
- *Prevent the equivalent of 4 billion plastic bottles ending up as waste by 2030.*
- *Be the first sector to achieve 100% commitment to the Social Mobility Pledge. The Social Mobility Pledge aims to invest in skills and promote opportunities in local communities, and to increase talent and diversity within companies, for example through work experience or apprenticeships for people from disadvantaged backgrounds or circumstances.*

Water UK also committed to establishing an independent panel to report annually on how well the sector collectively is doing to achieve these goals, starting in April 2020.

- Participants had generally positive views of Water UK's pledges, citing the goal on **affordable bills** and **net zero by 2030** in particular.

- However, participants tended to say that the **timescales were too long**, and that pledges should be implemented sooner or be in place already.

> " *They are all relevant and worthwhile goals that they are working towards but I do wonder why some of the timescales are 10 years away, surely some could be achievable before then?"*

> " *Making bills affordable is key as the costs of supply seems to have increased above inflation during the past few years."*

> " *It's quite comprehensive and shows a good company ethos. Helping both the community as well as nurturing talent and diversity is admirable. Net carbon zero by 2030 is a great goal."*

Reactions to Water UK's pledges with water companies

Can you think of any disbenefits, risks or concerns about water companies having social contracts? Has the information so far left you with any questions about it?

- Key concerns raised by participants were:
  - How companies would be **held to account** for their actions against the pledges
  - How companies' **progress would be monitored**
  - Whether there would be an **organisation** in place do carry out this monitoring

- Some participants had **doubts** that companies would follow through to **deliver** on the pledges – they were sceptical as to whether companies would change anything in practice.

- Some also questioned whether there would be any mechanism through which **customers could shape what is included** in a company's social contract.

"

Most of these pledges have been made for years but there's no real way to find out if they are ever achieved. It's not just the water industry as many companies make pledges that are never achieved."

"

How often are the social contracts changed? Do the customers have a voice in what is on the social contract? Is there an organization that monitors [whether] companies are adhering to their contracts?"

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Views on 'standard' water company activities, compared with activities that should belong in a social contract

Is there anything you think water companies should be doing as part of their essential day to day operations instead of a (separate) social contract? Which aspects you would consider 'extras', which should be included in a social contract?

- Participants explained they felt day to day operations should be **linked** to the objectives of social contracts – the latter being an extension of the former (as opposed to entirely separate from it). They highlighted **environmental considerations** in particular as an area that should be part of day to day operations, and not only under the remit of social contracts.

- Aspects which participants felt could be considered 'extra' – i.e. part of social contracts specifically – were:

  - **Water recycling initiatives**

  - **Initiatives to help support wildlife**

  - **Providing affordable plumbing services**

  - **Monitoring meters and informing households if they are consuming more water than usual**

  - **Becoming carbon neutral by 2030**

  - **Community projects.**

" *The social contract should by definition be part of their everyday activities as it would be rather pointless otherwise."*

" *Environmental issues should be part of their day to day not part of the social contract."*

" *Providing one off affordable plumbing services rather than expensive home serve plans."*

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How social contract activities should be funded

How should the activities that take place under a water company's social contract should be paid for – through customers' bills, by water companies, a mixture of both or something else? And would your opinion change if these activities were part of a water company's day to day operations, rather than its social contract? How should it be paid for?

- Most participants said that activities should be paid for **solely out of company profits**, with a few saying it should be a mixture, and none saying solely through customers' bills.

- Reasons for arguing that activities under social contracts should be funded by company profits alone were that social contracts are the **obligation of companies** (not consumers), that water **companies make enough to profit** to fund the activities, and that it would be **unfair** to place additional costs on consumers.

- The main reason participants gave for suggesting it could be funded by a mixture of company profits and funding through customers' bills was that consumers and water companies have **joint responsibility** for the social contract and that it 'runs both ways', so both parties contribute.

- In appears therefore that views on funding relate closely to views on whose responsibility the social contract is.

"

The social contract is created by, and an obligation of, the company. So it should be paid out of profits, even if that means reduced dividends for shareholders."

"

A contract is two-way, hence the joint responsibility of funding the contract."

"

The companies make enough profit and should be setting aside funding for their social responsibilities."

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Activity insights

- There was **little prior awareness** of social contracts among participants, particularly relating to water companies specifically.

- There was **broad support** for the idea of social contracts for water companies, particularly around care for the environment, provision of safe and high quality water, and giving back to the community. However, participants also expressed concerns about whether companies are **sincere** about social their social purpose, whether social contracts are **repackaging existing obligations** and responsibilities, and whether social contracts will **translate to action**.

- Participants suggested a **range of actions** they think their own water company may have taken to fulfil its social contract. These included social tariffs, sending reminders and tips about reducing water waste, water saving kits, prioritising vulnerable customers during the lockdown, home checks assessing need for water saving devices, and avoiding price increases.

- Most participants **considered it important for their water company to have a stated social purpose**, particularly in terms of the company being seen as **accountable, transparent and trustworthy.** Those who felt a social contract is not important explained they assumed water companies were acting responsibly anyway, or they would prefer water companies prioritise the provision of good quality and good value water services.

- Participants **reacted positively to Water UK's pledges, citing the goal on affordable bills and net zero by 2030 in particular.** However, some also felt the **timescales were too long**.

- A key concern about social contracts raised by participants was **how companies would be held to account**, how their **progress would be monitored**, and whether there would be an **organisation responsible for doing this**. Participants were also concerned that companies would not follow through on the pledges.

- Most participants said that activities that take place under a water company's social should be **paid for solely out of company profits**, explaining that social contracts are the obligation of companies, who have the profits to fund it. However, some participants considered social purposes to be a joint responsibility between consumers and water companies, and therefore both parties should contribute to funding.

Water companies and their social purpose: Responses and key demographics

- **Invited to take part:** all registered community members.

- **Activity dates:** 30 June – 15 July 2020.

- **Responses:** 81 members participated, representing 13% of *WaterVoice* members in Window Five.

- **Incentive**: prize draw entry for ten £20 Amazon vouchers.

Low base size: percentage figures should be treated as indicative only.

		Quotas	% Population Incidence*	Number of participants	% participants**
Age		18-29	4%	0	0%
		30-44	19%	10	12%
		45-59	36%	42	52%
		60-74	27%	26	32%
		75+	14%	3	4%
Gender		Male	47%	34	42%
		Female	53%	47	58%
		In another way	-	-	-
Tenure		Owner occupier	65%	60	74%
		Renter	35%	21	26%

*Based on bill payers in England and Wales

**Based on number of participants as a percentage of all those taking part in this activity

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Water companies and their social purpose: Responses by water company

Water Company	Number of participants	% participants
Affinity Water Central	4	5%
Affinity Water East	4	5%
Affinity Water South East	2	2%
Anglian Water Services Ltd	12	15%
Bournemouth Water Plc	2	2%
Bristol Water Plc	0	0%
Cambridge Water Company Plc	1	1%
Dŵr Cymru (Welsh Water)	6	7%
Essex & Suffolk Water	1	1%
Hafren Dyfrdwy	0	0%
Hartlepool Water Plc	0	0%
Northumbrian Water Ltd	5	6%
Portsmouth Water Plc	1	1%
SES Water Plc	0	0%
Severn Trent Water Ltd	10	12%
South East Water Plc	4	5%
South Staffs Water Plc	3	4%
South West Water Ltd	5	6%
Southern Water Services Ltd	5	6%
Thames Water Utilities Ltd	3	4%
United Utilities Water Plc	4	5%
Wessex Water Services Ltd	3	4%
Yorkshire Water Services Ltd	6	7%

*Low base size: percentage figures should be treated as indicative only.*

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Water Mark: Your water company's performance made clear

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Activity aims & questions asked

This sequential board introduced participants to Water Mark, a tool that presents water company performance data in a way that allows comparisons to be made between water companies according to a number of criteria.

Participants were asked about:

*   **First impressions** of the Water Mark tool, including what they like and dislike about it

*   What the **purpose** of the tool is

*   How **useful and interesting** the information on the Water Mark tool is, and how **easy it is to navigate and to understand**

*   Whether this is something that participants **expect** from CCW, who it is aimed at and who may benefit from using it

*   How (if at all) they may **use** the tool themselves

*   How they think the tool could be **improved**

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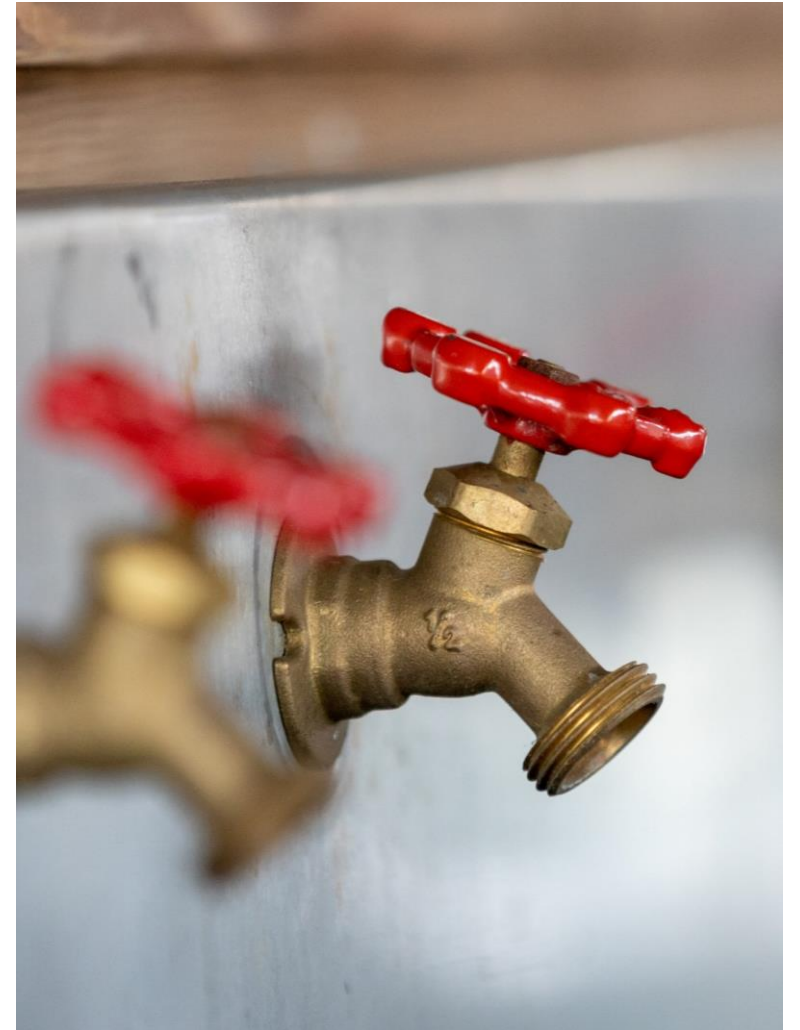
First impressions of the Water Mark tool – positive features

Please tell us anything you like about Water Mark and the information you have viewed, and why.

- The **ranking and rating was seen as clear, well laid out, and easy to compare** the scores of water companies. Participants described the traffic light colours and the water droplet symbols as clear, accessible, stylish and easy to understand.

- At the same time, participants thought the information presented was **comprehensive**, it covered all the important questions and the **metrics felt relevant** to them (personally) and their households.

- Several liked the **links to further information** that are included on the page, specifically the 'i' for more information next to each column, and Discover Water, which it was suggested could be useful for school projects.

- Some felt the information is **open and honest**, and shows customers what they should **expect from their supplier**.

- One participant commented that the score helps them to see the difference between companies' promises, and how their **actions compare to their words.**

" *I found it interesting. I didn't know there was such a table. It should make water companies improve their performance."*

" *They are metrics that are relevant to me and my household, and I can understand them at a quick glance. I like the league table layout. It shows me performance against others and what I should expect from my provider."*

" *The 'i' button for more information was useful as I would have been confused on a few things without it."*

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First impressions of the Water Mark tool – drawbacks

And what, if anything, do you dislike about Water Mark, and why?

- As they **cannot change water company, the information felt pointless** to some, or even annoying if their water company scores poorly.

- Some **did not trust that the data is valid and unbiased** as the source is not made clear. Participants questioned whether the data had been collected independently.

- Some consider survey data to be **subjective**, and argued there is not enough objective data, especially on the metrics about bills.

- The graphics and traffic light system **over-simplified the ratings,** limiting the insight they provide. Participants wanted to be able to click through to details behind the ratings, especially when ratings were low.

- There was some **confusion around ratings for affordability, value for money, and fair bills** – these participants questioned whether it is contradictory for a water company to have different scores across these metrics.

- Some participants believed **water companies should be compared against 'an expected standard'** (rather than being compared to each other), arguing that rating above average does not indicate good performance if the average is poor.

- There were a couple of criticisms relating to the **design**: yellow droplets are difficult to see against a white background, there is too much information to take in at once, and the need to scroll along to see the full table was not immediately obvious.

> *I'm not bothered how they are doing in relation to other companies. I am bothered about how they are doing for me."*

> *The comparisons are interesting in so far as I now know my water company is bottom, but since you can't choose your water company all it does is cause annoyance."*

> *I also note that very few water companies are classified as having 'fair billing' but they all rank as reasonable 'affordability' - isn't this rather a contradiction in terms?"*

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Perceived intended purpose of the tool

What do you think the purpose of the Water mark tool is?

- Many participants **questioned the need for the tool given that customers cannot choose supplier**.

- However, others disagreed, and understood the purpose to be to **bring transparency and accountability** to the industry, giving customers an unbiased assessment of how their water company is performing.

- Even though they cannot change supplier, some participants felt that public **'naming and shaming' may encourage water companies to make improvements** and fulfil the promises they have made. However, some argued (again) that water companies may not be influenced by this because they do not have to compete for customers.

- Some suggested it may **encourage improvement** across the industry by allowing companies to **monitor and learn from customer feedback** and learn from **other companies who have performed better** in some areas.

- A few felt that these scores help customers to see how their money is being spent, and gives them a better chance to highlight issues they are experiencing.

"

For consumers to find out an unbiased view of how their water company is performing compared to other areas on the country. A grading system for water companies to aspire to and work towards."
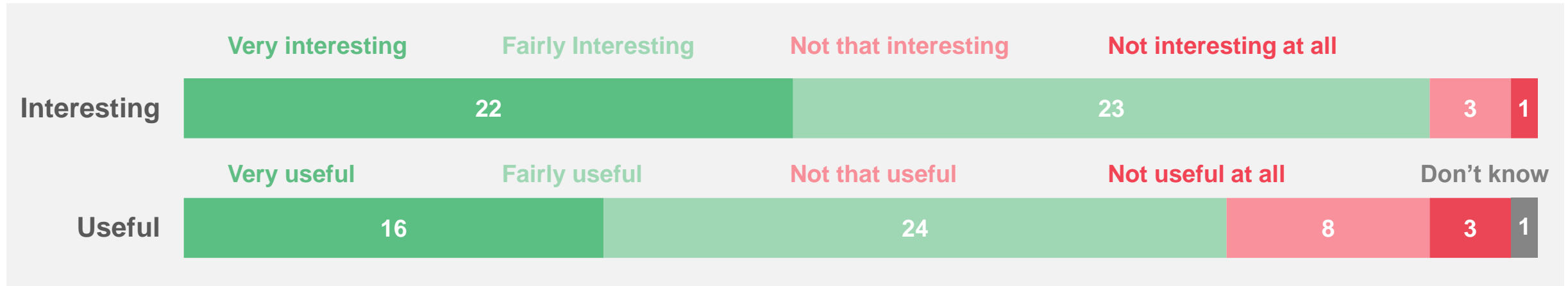
"

Comparing different water companies - to what end, I cannot say."

"

I suppose public shaming of bad performance may have a result, but as they are local monopolies I very much doubt it."

"

I hope it would make the water companies sit up and take notice."

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Views on the information presented in the Water mark tool

How interesting or not is the information Water Mark presents? / How useful or not is the information presented in the Water mark tool?

	Very interesting	Fairly Interesting	Not that interesting	Not interesting at all	
Interesting	22	23		3	1

	Very useful	Fairly useful	Not that useful	Not useful at all	Don't know
Useful	16	24	8	3	1

Interesting: 45/49

Useful: 40/52

" *It is interesting to see rankings, and I had no idea my local water supplier was top.*"

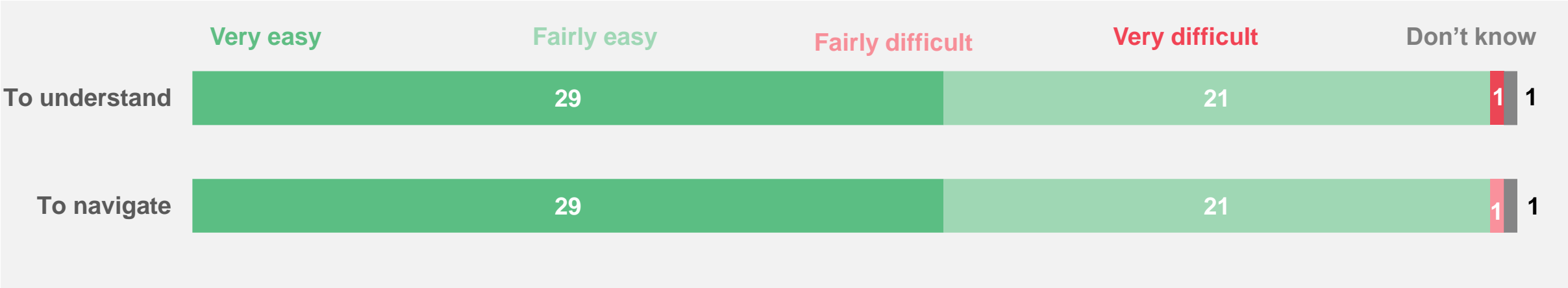" *I liked seeing how my water company compared with others but, as I am unable to change provider, I don't know how useful it really is.*"

" *Just doesn't interest me as I can't change my water company.*"

" *I thought that this website was clear and useful and gave helpful links if you were interested in following things up.*"

Base: All participants responding 15 – 23 July 2020 (49 answering 'how interesting' and 52 answering 'how useful'). Figures presented as 'n' rather than percentages due to low base size.

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Navigating and understanding the information on Water Mark

How easy or difficult is the information to understand? / How easy or difficult is the information to navigate?

	Very easy	Fairly easy	Fairly difficult	Very difficult	Don't know
To understand	29		21	1	1
To navigate	29		21	1	1

Easy to understand: 50/52
Easy to navigate: 50/52

> *The layout of the webpage is organized in categories. [It is] easy to follow and to choose which information one needs to read."*

> *It all makes sense after a little perusing. Perhaps a home page explaining the tables and method would be helpful."*

> *Initially did not realise that the table scrolled to the right, so a bit more signposting of that might help."*

Base: All participants responding 15 – 23 July 2020 (52). Figures presented as 'n' rather than percentages due to low base size.

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Views on the role of Water Mark

To what extent would you have expected CCW to publish this type of information in this way?

- For some participants, this is **exactly the type of information** they would expect CCW to provide as a consumer body. However they did not necessarily expect it to be **available all in one place**, and in such a **customer friendly, jargon-free format**. A few would have expected such information to spread across different annual reports or individual company sites, and were surprised they could so easily compare it.

- Several participants had not previously considered whether they would expect this from CCW before today, although they said were glad to see it and it was **'a pleasant surprise'.**

- There were some that expected a **'more rigorous approach to data'**, or for the information to instead come from OFWAT.

> *In these days there are always sites that provide comparisons so I would certainly expect this to be somewhere and CCW seems to be a sensible place for it to be."*

> *I should imagine it is for the governing body of water companies, to be able to compare the different companies and act accordingly."*

Who do you think the Water Mark tool is aimed at, and who may benefit from using it?

- Most common answer is that the tool is aimed at **customers** to provide them easy access to unbiased information and enable them to demand a better service from their water company.

- Many also said it is aimed at **water companies**, to push them into improving in their weakest areas.

- Others say it is aimed at **watchdogs, 'governing bodies' and investors** as they also have ability to improve industry performance.

> *It is probably aimed primarily at the industry, but it is good information for consumers, as it enables them to see what the criteria being fed back to the water industry is, and where improvements need to be made. We can all benefit from good data that is relevant to the industry."*

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How may participants use Water Mark?

How, if at all, might you use Water Mark in future?

- Participants suggested they may use the tool in the following circumstances:
  - If they are considering **moving to a new area** and want to assess the water services there
  - If they are **raising a recurring i**ssue with their water supply and want to **evidence** that it is a valid issue
  - To see what they are **getting for their money** and to **check the progress of their supplier** against targets
  - To **contest** a potential increase in water company rates (if this happens despite poor performance)
  - To **cross-check and possibly challenge** water companies' claims of performance if these do not match Water Mark ratings.
- Some people claimed they would not use the tool, because they cannot choose their provider. However, there were several participants who appeared unaware of this, who said they may use the tool if they were to attempt to switch.
- A few participants said they would look at the tool out of interest, but not for anything specific.

" *I don't think I would use it unless I had a major problem with my water company and wanted to throw some figures at them."*

" *No use at the moment, but if we are allowed to change suppliers in the future it may be useful."*

" *To see if my company are performing in line with targets set by regulator."*

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Suggested improvements

Please tell us anything you would improve or change, and anything which is missing from the Water Mark tool

- Many participants had no specific suggested improvements. However, those that did gave a range of responses:

  - **A homepage introducing the tool and the methods used to create it,** including sample size and how much weighting is given to each metric when calculating ratings

  - **Ability for customers to check which is their supplier using a postcode checker**, in case they are not already aware

  - **To update Water Mark every year** and send it out to customers

- Some participants wanted more information, yet others wanted to reduce the amount on the screen. Some suggested achieving this by moving some of the categories behind a 'find out more' link. Some of the additional information suggested included:

  - Adding an **explanation next to low ratings**, and what the next steps are to address the issues

  - Adding an **'Overall score' column** and a separate water quality metric

  - Adding **objective figures to compliment customer feedback**, for example showing the average price of bills against the value for money metric.

- There were also some suggestions on formatting:

  - Making the **scrolling bar more obvious** so that users do not miss the columns to the right

  - Put the **key above each section** to avoid needing to repeatedly scroll up.

Rank	Company	Water service	Value for money - Water	Long-term water supply	Bills are fair
1	Bournemouth				
2	Hartlepool				
3	Portsmouth				
4	Cambridge				
5	South Staffs				
6	Bristol				
7	South East				
8	Essex and Suffolk				
9	SES Water				
10	Affinity				

Activity insights

- Positive features of the tool included the graphics and use of traffic light colours to **clearly rank and rate**; the ability to **easily compare** companies' performance; and the **links to further information**. Participants welcomed the tool as a form of **transparency**, and the information felt **relevant** to them.

- However, some had **reservations about the credibility and independence** of the data, as they had not seen enough information about the methods of data collection and they felt that **customer feedback is too subjective** to be the only type of data used. Some also questioned the use-value of the information given that customers cannot switch water company (although not everyone was aware of this).

- A few argued that rating companies against each other – rather than a single objective standard – will not help highlight areas of industry-wide poor performance. While the **traffic light colours and icons make the data more customer friendly, some felt it over simplifies the data.** These participants want to be able to click through to the detail before the ratings, especially if the rating is very low.

- Participants recognised Water Mark is **designed to be understood by customers**, but there was some uncertainty about the purpose of this given that, again, customers cannot choose their supplier. A few concluded that this limited the value of the tool, although many still felt that arming customers with this published information could still be effective at **encouraging water companies to improve in their weakest areas**.

- A majority of participants found the tool **interesting and useful**, and nearly all found it **easy to understand and navigate**.

- Some participants did **expect** this type of information from CCW, but were surprised that it was presented in such a **convenient, customer friendly format.** Participants may use the tool **to look up information** (e.g. if moving house, if wanting to check company performance against targets), but also to provide them with **evidence and support** (e.g. if contacting their water company about a recurring issue, or challenging an increase in bills).

- Suggested improvements included **enhanced functionality** (e.g. a postcode checker to identify the water company in an area), **access to technical information** (e.g. explaining the methods used to create the tool), **additional data** (e.g. 'objective' data and an 'Overall score' column) and **improved formatting** (e.g. making the scrolling bar more obvious).

Tell us about your tap water!: Responses and key demographics

- **Invited to take part:** all registered community members.

- **Activity dates:** 15 – 23 July 2020.

- **Responses:** 52 members participated, representing 8% of *WaterVoice* members in Window Five.

- **Incentive:** prize draw entry for ten £20 Amazon vouchers.

Low base size: percentage figures should be treated as indicative only.

	Quotas	% Population Incidence*	Number of participants	% participants**
Age	18-29	4%	0	0%
	30-44	19%	5	10%
	45-59	36%	30	58%
	60-74	27%	15	29%
	75+	14%	2	4%
Gender	Male	47%	26	50%
	Female	53%	26	50%
	In another way	-	-	-
Tenure	Owner occupier	65%	42	81%
	Renter	35%	10	19%

*Based on bill payers in England and Wales

**Based on number of participants as a percentage of all those taking part in this activity

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Tell us about your tap water!: Responses by water company

Water Company	Number of participants	% participants
Affinity Water Central	4	8%
Affinity Water East	3	6%
Affinity Water South East	0	0%
Anglian Water Services Ltd	8	15%
Bournemouth Water Plc	2	4%
Bristol Water Plc	1	2%
Cambridge Water Company Plc	1	2%
Dŵr Cymru (Welsh Water)	5	10%
Essex & Suffolk Water	3	6%
Hafren Dyfrdwy	0	0%
Hartlepool Water Plc	0	0%
Northumbrian Water Ltd	2	4%
Portsmouth Water Plc	2	4%
SES Water Plc	0	0%
Severn Trent Water Ltd	7	13%
South East Water Plc	1	2%
South Staffs Water Plc	2	4%
South West Water Ltd	2	4%
Southern Water Services Ltd	3	6%
Thames Water Utilities Ltd	1	2%
United Utilities Water Plc	1	2%
Wessex Water Services Ltd	2	4%
Yorkshire Water Services Ltd	2	4%

Low base size: percentage figures should be treated as indicative only.

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Discussing the quality of your drinking water at home

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Activity aims & questions asked

This activity followed a survey conducted in Window 4: '*A glass half full or empty? Tell us about your tap water!'.* An online discussion group was conducted with participants who had rated the quality of their tap water negatively in the survey.

The purpose of conducting this small-scale qualitative group discussion was to explore the range of experiences and views of participants with poor quality tap water at home, including:

- **Participants' water consumption behaviours at home, problems with their tap water,** and why they think these problems may occur.

- **Actions participants have taken or considered** as a result of perceived poor tap water quality, including contacting their water company and trying measures to improve the taste, smell, appearance or any other aspect of the water.

- **Awareness of steps taken by water companies** to improve drinking water quality, views on whether water companies should do more to improve the taste of tap water and suggestions for what this could involve.

- **Exploring the extent to which participants' overall views of their water company are shaped or influenced by their tap water quality**, and reactions to a hypothetical scenario in which customers' water quality is improved for a small increase in their water bills.

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Views and experiences of poor drinking water quality at home

How often do you drink the tap water at home?

- Within the group, participants' drinking water habits ranged from those who pour and drink water **straight from the taps** most or all of the time, those who **sometimes opt for bottled water** instead, and those who **never drink plain tap water** at all.

- Those who never drink plain tap water at home explained they would drink it after filtering, boiling it to make tea and coffee, or flavouring it with drinking squash or fruit juices.

> *I drink* [tap water] *every day. I can't have it by itself though. It has to be used to make coffee/tea or squash."*

Problems with tap water and reasons for not drinking it

- Participants experience the following discernible problems with their water:

  - **Poor taste**
  - **Unpleasant smell**
  - **Cloudiness**
  - **Hardness and limescale**

- Some also doubted the cleanliness of their water, and were concerned that added **fluoride** is harmful to health (although not everyone agreed).

> *The smell is always like bleach."*

> *Whenever we run the water it is cloudy and we have to wait for around two minutes… The cloudiness clears eventually but it is annoying and wasteful."*

Causes of the problems experienced

- Participants believed the problems with their tap water were due to processing and repeated recycling of water before it is delivered to homes, including **filtering** and **treatment**.

- One participant suggested fluoride is added to help consumers' teeth (others described it as a toxin).

- Participants also recognised tap water quality **varies across the country,** and explained they live in a 'hard water area'.

> *It's to do with treatment to make it palatable."*

> *We have had fluoride added to our water as well… Something to do with children's teeth."*

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Actions taken or considered to improve drinking water quality

Experiences of measures taken

- Participants had tried a range of measures to improve their drinking water at home:

  - **Flavouring water** (e.g. with squash, fruit juice, coffee),
  - **Filtering water** (including for making tea and coffee) using a filter jug or charcoal coffee filters,
  - **Drinking bottled water instead** (including for making drinking squash),
  - **Leaving water to settle** after pouring it from the tap, and
  - **Running the tap** for several minutes before drinking.

- Although the above measures were generally effective, some participants felt strongly about their poor water quality because of the **cost of alternatives** (especially bottled water and using water filters); **wasted water** if needing to run the taps for longer (e.g. until the water becomes less cloudy); **impacts on health** of poor quality drinking water; and **plastic waste** associated with bottled water.

- One participant had **contacted their water company** about their water quality and was advised to leave the tap running. The others had not done this as they were doubtful any actions would be taken by the company.

Other measures considered

- Participants also mentioned other measures they had heard of (but not tried), previously tried or were yet to take:

  - **Copper jugs and filters,** which two participants felt offered health benefits, but they wanted to find out more before purchasing,
  - **Larger filters/purifiers** (one participant was considering),
  - **Other types of filter** including filter jugs and charcoal filters, which became too expensive to use habitually, and
  - **Testing the water for acidity and metals** (something one participant had heard of other people doing).

> " *I have been looking at scientific evidence and* [there is a] *lot to be said for using copper jugs.*"

> " *We are looking to invest in a built-in filter or a huge Berkey filter system.*"

> " *We did use a filter jug but then the filters became expensive.*"

> " *I even use bottled water for squash.*"

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The role of water companies in improving drinking water quality

Awareness of steps taken by water companies

- Most of the group had not seen or heard about anything their water company was doing to improve customers' drinking water (although one had been notified by the company when there was a problem).

- Some participants explained they felt water quality was a **lower priority for water companies** than other issues, such as responding to leaks and sewerage problems, and that **cost** may be an underlying reason for lack of action.

- One participant had requested information from their water company about the cause of their poor drinking water. They did not receive the information they were looking for, and were sceptical that water companies would be transparent about this (a view echoed by others).

> *I think ours is focusing on stopping leaks, the quality isn't a priority for them."*

> [Water companies should] *use public 'taste testers' and publish their true responses."*

Should water companies do more?

- Earlier in the discussion, some participants suggested water companies should **invest in water filters** for their customers, and **filter the water supply** (e.g. using charcoal) before water reaches customers' homes.

- Participants had already recognised water quality varies in different parts of the country, and they found it disappointing to live in an area with poor quality water.

> *The taste of tap water may vary in different parts of the UK. This may be related to the geology of the area, the source of the water or the way it is processed. There is also variation in the way different people discern the taste of tap water. To what extent should water companies do more to improve the taste of the tap water you receive?*

After reading this information, participants suggested companies should **stop adding impurities**, offer **bill reductions** for consistently poor water quality and **publish 'taste test' results**.

However, some explained that because it is not possible to switch water supplier (and not everyone was aware of this), **companies have little incentive** to take actions, especially as most types of domestic water use do not require the same (high) level of quality as drinking water.

The impact of drinking water quality on views of water companies

Impact on views of water companies

- Participants' views were mixed as to how the quality of their drinking water made them feel about their water company.

- On one hand, some pointed out how fortunate they feel and how grateful they are to have access to clean water.

- However, some participants **felt resigned** to having poor drinking water quality, and some had low levels of trust in their water company and felt it offers poor value for money in general. It is important to recognise that this view was influenced by other factors aside from water quality – for example, a perception that water companies prioritise shareholders over customers in general.

> *I don't feel I get value for money, especially when they put the rates up and you can't understand what the increase is for."*

> *I'm all for* [the hypothetical scenario] *if I see an improvement at some point. But I would want* [to be] *refunded the increase if no quality improvement is seen. Then the emphasis is on the water company."*

Hypothetical scenario testing

> *Imagine, just hypothetically, that there was something your water company could do to improve the quality of its customers' tap water – that is, the taste, smell or appearance of the water.*
>
> *For the company to do this, it would probably need to charge all its customers a little more in their water bills. However, the level of improvement that is made to the tap water quality may differ between customers of the same water company. This is because some customers may experience a better quality of tap water than others to start with (meaning they may not need the improvement at all). Meanwhile some customers may have their tap water quality improved, but may still dislike its taste, smell or appearance.*
>
> *How would you feel about this hypothetical scenario, and why?*

- In response to this information, participants felt that a **tangible, noticeable improvement would need to be made** to their tap water quality to justify an additional charge, especially given existing annual price increases. Higher prices may be acceptable, since this might be offset by not needing to spend on water filters.

- Some suggested however that firstly, water companies should make **efficiencies and improvements** elsewhere (e.g. fixing leaks more quickly to avoid water waste) and invest in drinking water.

- Some also suggested refunds should be offered if no improvement is experienced.

Activity insights

- Although everyone taking part in the group considered their drinking water quality at home to be poor, they had responded to this in different ways. Some had **continued to drink their tap water** despite the problems with it (perhaps modifying it in some way, such as adding something to flavour it), some **occasionally consumed bottled water** instead and some **avoided drinking their tap water altogether**.

- The issues participants experienced related to the **taste, smell, appearance (cloudiness) and hardness** of their tap water. Some were also concerned about how **clean** their water is, and the health effects of consuming **fluoride** added to water. They attributed these problems to the level of processing and treatment needed to deliver tap water to homes.

- The range of measures taken by participants to improve their tap water included **flavouring or filtering** it, **running the tap or leaving the water to settle** after pouring it, or simply **switching to bottled water**. Some were also considering measures that would involve a higher investment, such as copper jugs or filters and other home-filtering systems. However, not everyone was comfortable taking these measures, referring to associated issues including **plastic waste** (if consuming bottled water), water waste (if needing to run the tap for longer than usual) and the **cost** of water filters or bottled water.

- Few had heard of any steps taken by water companies to improve their customers' drinking water. The group also **recognised that water quality varies across different parts of the country.** In addition, one participant **questioned the incentives that water companies would have to improve customers' water,** given that customers cannot switch company. However, the group suggested water companies should provide water filters to customers, or filter the water in some way before it reaches customers' homes.

- Reactions were mixed in response to the hypothetical idea of increasing customer bills by a small amount to fund improvements to customers' drinking water quality. Participants felt this **may be acceptable only if demonstrable improvements were achieved**, and **bill reductions offered to customers if not.**

- In general, although drinking water quality **may have shaped some participants' opinions of their water company** to some extent, this was not the only factor influencing their overall views.

Group composition and participation details

- **Invited to take part:** community members who had responded to the survey '*A glass half full or empty? Tell us about your tap water!*' and rated the quality of drinking water that comes from their taps at home as 'fairly poor' (three participants) or 'very poor' (two participants).

- **Group details**: five participants accepted the invite and attended the group, held on the evening of 22 July for a duration of one hour.

- **Group composition**: all five participants were customers of different water companies, and lived in different parts of the country. Participants ranged in age from 39 to 75+, three were male (two female), all were home owners and two were solely responsible for the household water bill (three were jointly responsible).

- **Incentive**: each member taking part in the group was given a £30 -voucher as a gift in return for their time.

Ipsos MORI

Name:

BEN MARSHALL

Details:

ben.marshall@ipsos.com

Name:

LIZZIE COPP

Details:

elizabeth.copp@ipsos.com

Name:

DYLAN SPIELMAN

Details:

dylan.spielman@ipsos.com

Name:

JENNIFER GISBORNE

Details:

jennifer.gisborne@ipsos.com

Ipsos MORI