

A large, stylized graphic of a globe in shades of blue, positioned on the left side of the slide. It features curved lines representing latitude and longitude.

Customer Perceptions and Needs

***For: City of Cape Town
Water Services***

***By: ACNielsen
9 November 2004***

Methodology



Residents:

- A sample of 400 residents, from a database across all household types, supplied
- A sample of 100 residents, drawn from 25 of the largest informal areas identified, from aerial photographs supplied



Businesses:

- Sample of 25, based on land use and proportionately split by business/commercial and industrial, selected on an equi-interval basis



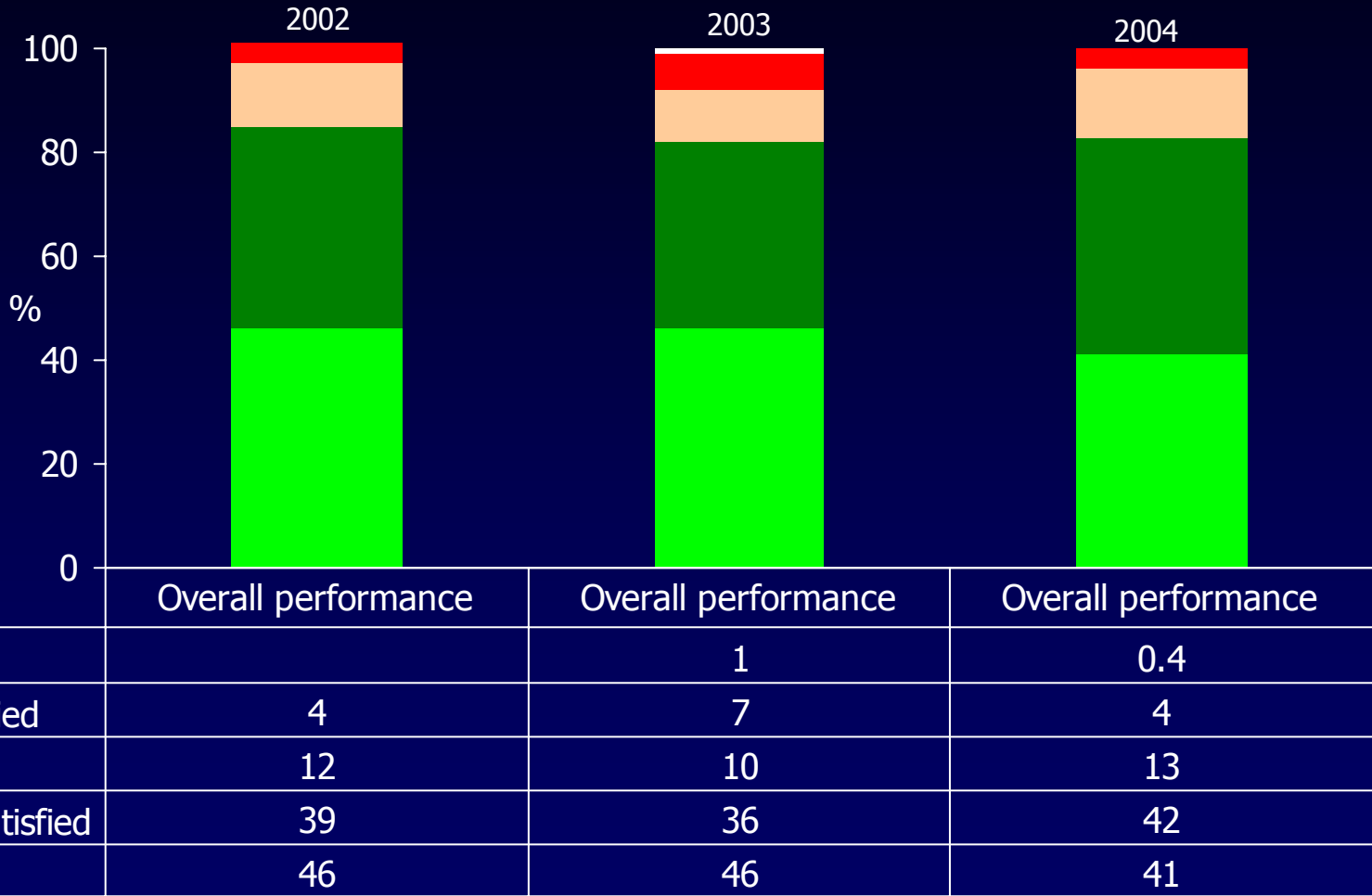
Personal interviews in the preferred language of respondent, using a semi-structured questionnaire – CAPI (Computer Assisted Personal Interviewing) and PAPI (Pen and Paper Interviews)

Satisfaction levels - overall performance

Base: All informants

High satisfaction levels of 80%+, a slight decline of 'very' satisfied

Some problems re water pressure was mentioned



Source: Project Puddle '02, '03, '04 n=497, 520, 400

Q.1

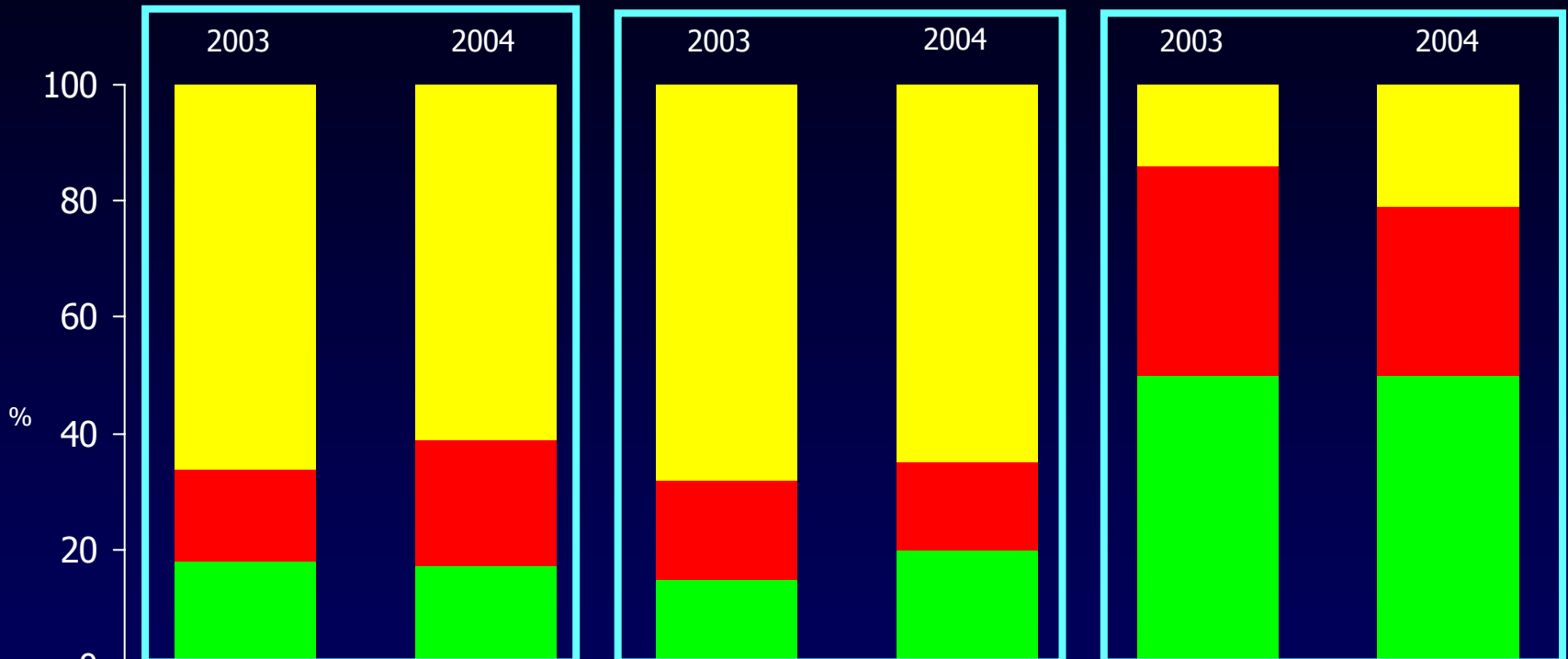
How satisfied are you with the overall performance of the City of Cape Town in providing services to residents?

Residents

More disagree that CT water cost less
 More agree that CT water cost same/
ore than rest of SA

Perceptions

Base: All informants



| | In CT water cost less than anywhere else in South Africa | | In CT water cost the same or more than other places in SA | | Generally pay too much for water | |
|----------|--|------|---|------|----------------------------------|------|
| | 2003 | 2004 | 2003 | 2004 | 2003 | 2004 |
| Not sure | 66 | 61 | 68 | 65 | 14 | 21 ← |
| Disagree | 16 | 22 ← | 17 | 15 | 36 | 29 ← |
| Agree | 18 | 17 | 15 | 20 ← | 50 | 50 |

Source: Project Puddle '03, '04 n=520, 400

Q.10

To what extent do you agree or disagree with each of the following?

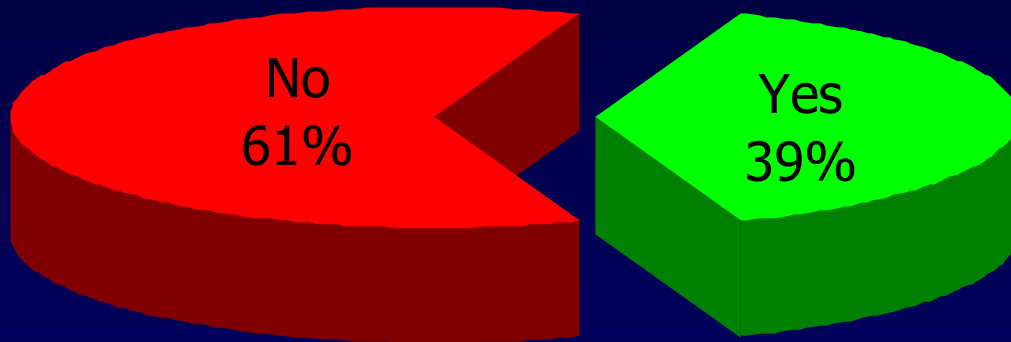


Residents

Behaviour changed to conserve water

Base: All informants who changed behaviour

Main motivator among upper income: "adhere to water restrictions", the rest: "increase in price"



Yes (n=151)

Had to use less, price of services increased (40%)

Information provided by government on water conservation (29%)

Had to adhere to water restrictions (20%)

Greater awareness to save water / greater responsibility to the environment (7%)

Source: Project Puddle 2004 n=400

What was your main reason for changing your behaviour to conserve water?

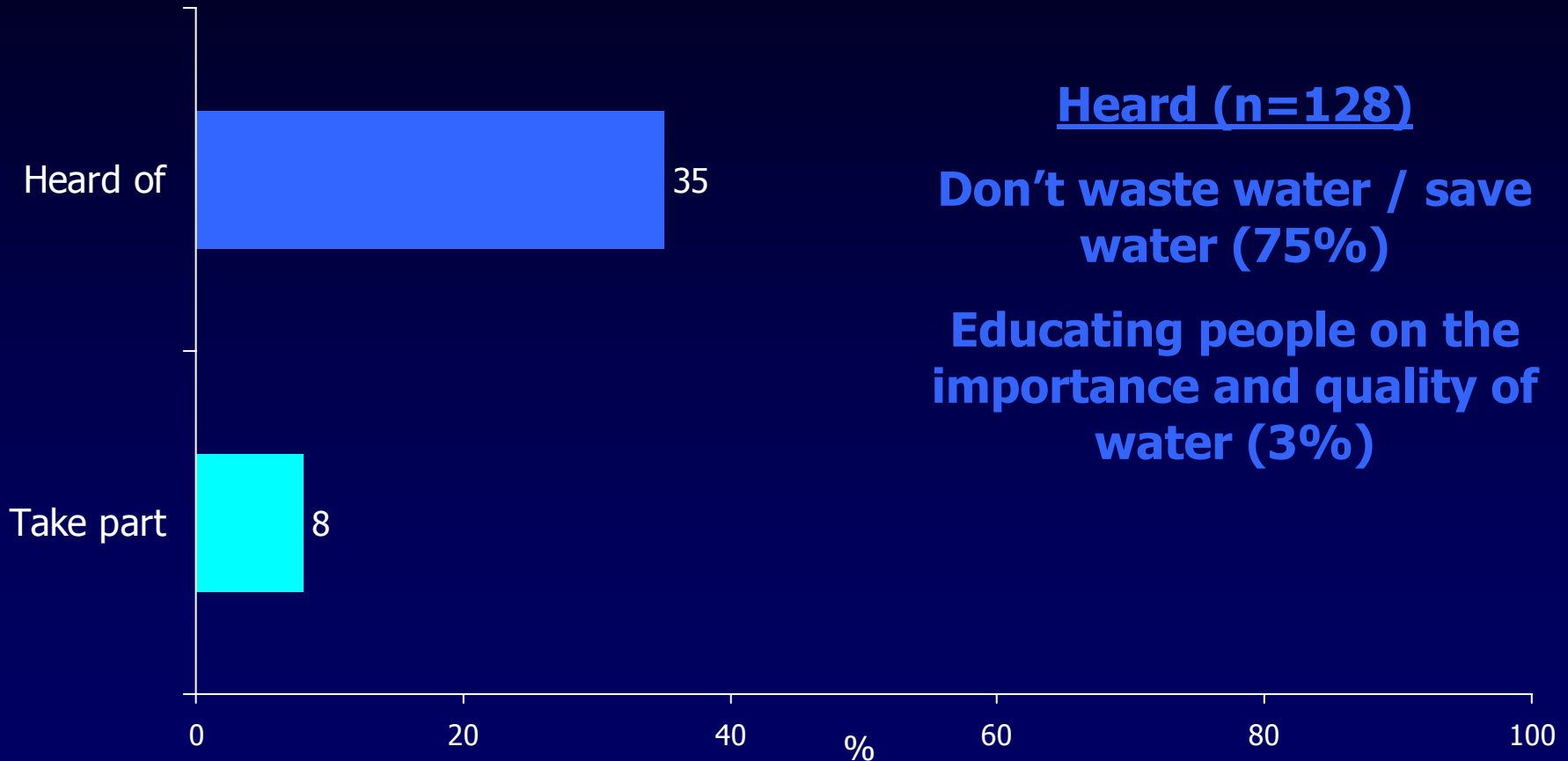
Q.18, 19

Residents

Water Week Initiative

Base: All informants

Participation higher amongst lower income groups (14%)



Source: Project Puddle 2004 n=400

Q.13a,b

Have you heard of the National Water Week initiative? What have you heard? Take part?

Residents

Water / sewer account – whether received and understood

Base: All informants

Most receive and understand the account

Yes (n=354)

Very easy to understand (67%)

Not so easy to understand (24%)

Almost impossible to understand (9%)

Accurate (n=354)

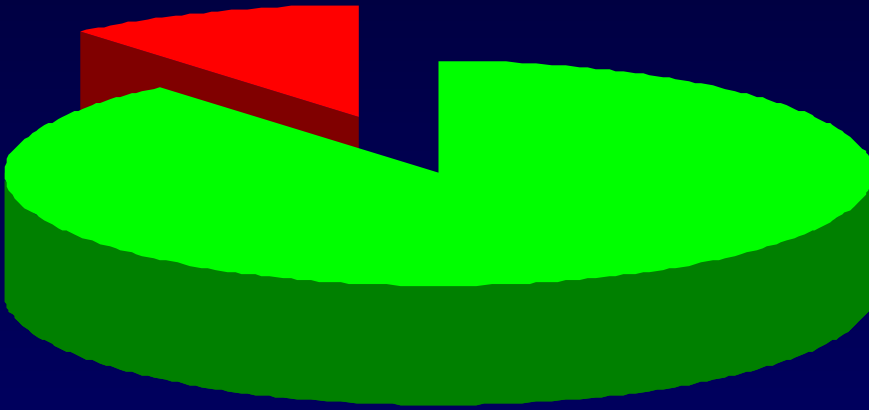
Accurate – every time (41%)

Accurate – almost always, but not every time (46%)

Not accurate at all (13%)

No
11%

Receive account



Yes
89%

Source: Project Puddle 2004 n=400



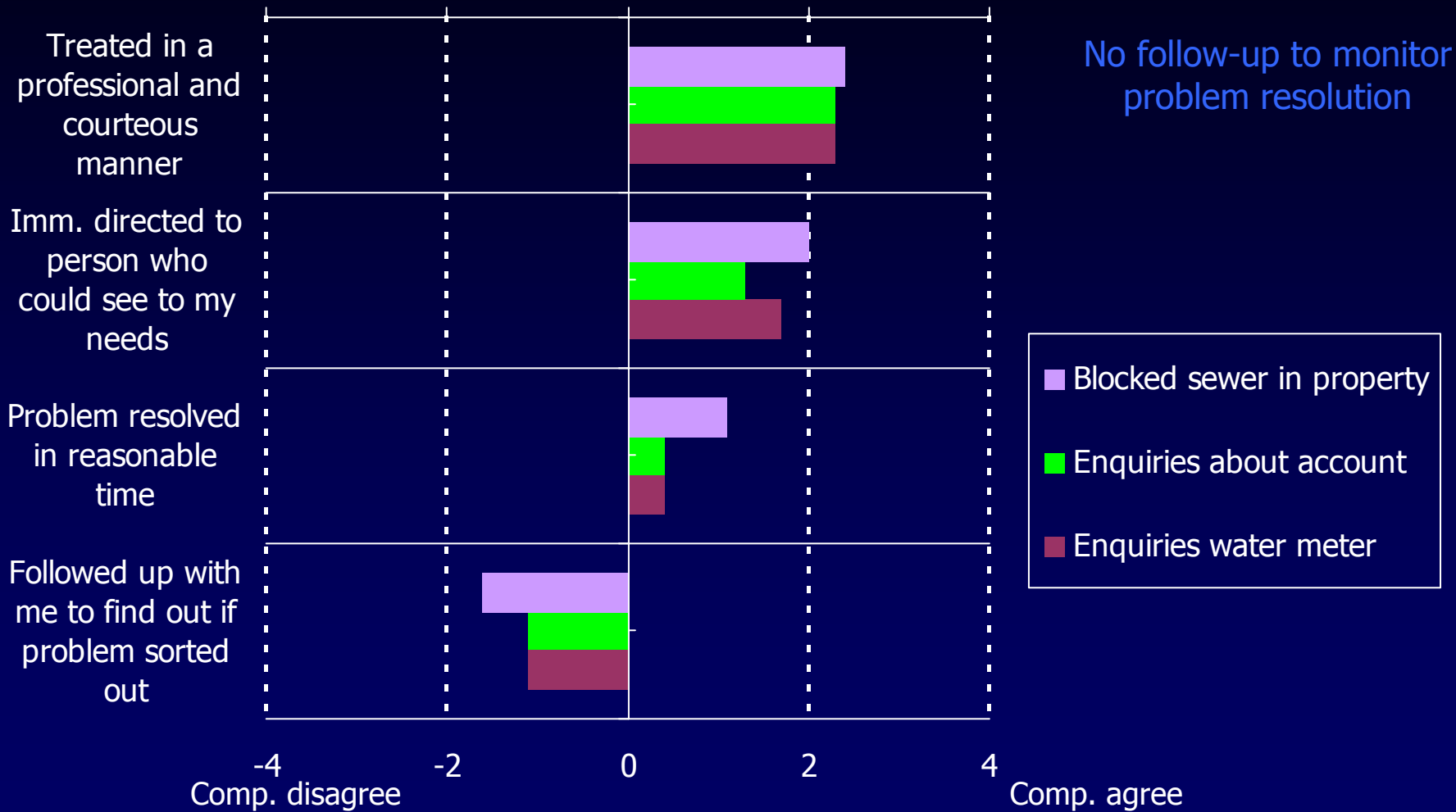
Do you regularly receive a water/sewer account / Do you feel the water/sewer account is ...?

Q.20a,b,c

Residents

Evaluation of service

Base: All informants



Source: Project Puddle 2004 n=45, 84, 46

Q.12



Thinking about the time you had contact with municipality to..., to what extent would you agree or disagree with each of the following statement?
Residents

Adexpose

Based on recognition of adverts...

I have seen this ad on a number of occasions

I have seen this ad once or twice

I have not seen this ad before

Exposure groups are formed...

Nil exposure

Low/Medium exposure

High exposure

Exposure to advertising – English

Base: All informants who understand English



**Make the most of it
But please go easy**

Cape Town's dams
That's why we're in
Showers instead of
Avoid for dropping it.

Save Water.

Please don't water between

**Sunny skies are lekker! But also helluva dry!
Save Water. Save the Cape.**

Please don't water between 10am and 4pm every day.

For info phone the City of Cape Town 021 400 3094 or 400 2994 weekdays 10am to 4pm.



**Together we can do it!
Please go easy
on our tap water.**

Cape Town's dams are running low again.
That's why we need to save it, sparingly.
Shower instead of bathing. (Or share a bath.)
And fix dripping taps and leaky plumbing.

Save Water. Save the Cape.

Please don't water between 10am and 4pm every day.

For info phone the City of Cape Town 021 400 3094 or 400 2994 weekdays 10am to 4pm.

**Do what the Mother says!
Save Water. Save the Cape.**

Please don't water between 10am and 4pm every day.

For info phone the City of Cape Town 021 400 3094 or 400 2994 weekdays 10am to 4pm.



**Catch a wake up!
Save Water. Save the Cape.**

Please don't water between 10am and 4pm every day.

For info phone the City of Cape Town 021 400 3094 or 400 2994 weekdays 10am to 4pm.



Water restrictions

Base: All informants

Increased exposure leads to a belief that water restrictions are in place



| | Nil | Low/Medium | High |
|---|------|------------|------|
| ◆ All water restrictions have been lifted | 0.42 | 0.31 | 0.05 |
| ■ No watering 10h00-16h00 | 0.62 | 1.12 | 1.6 |

Source: Project Puddle 2004 n=400

Q.10

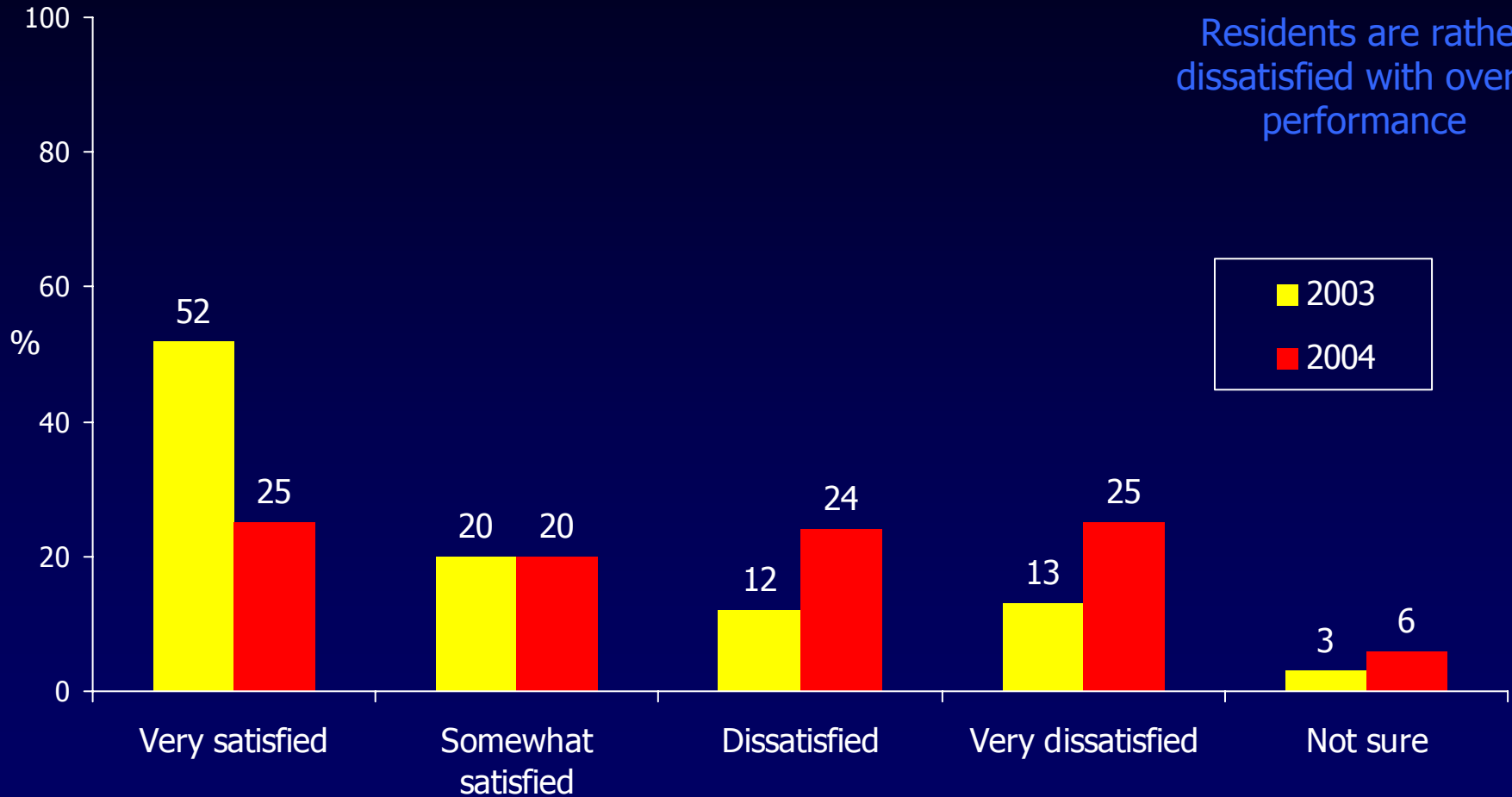
A stylized globe graphic in a dark blue color, featuring a grid of latitude and longitude lines. The globe is positioned on the left side of the slide, partially overlapping the text.

Informal Settlements

Satisfaction levels - overall performance

Base: All informants

Residents are rather dissatisfied with overall performance



Source: Project Puddle '03, '04 n=100, n=100

Q.1



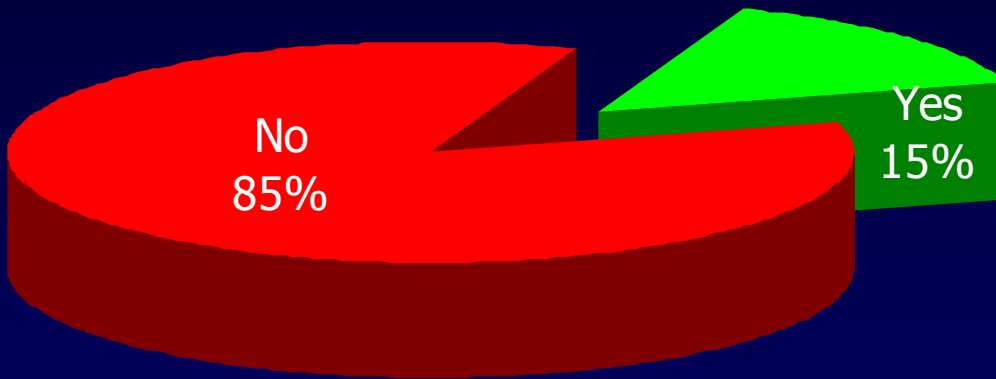
How satisfied are you with the overall performance of the City of Cape Town in providing services to residents?

Informal Settlements

Consulted when decision taken about provision of basic water and sanitation

Base: All informants

Fewer claim to have been consulted



Yes (n=15)

Public meetings (87%)

Councillors visits (13%)

2003: Yes (n=27)

Public meetings (93%)

Door-to-door visits (19%)

Councillors visits (7%)

Source: Project Puddle '03, '04 n=100, n=100



As far as you know, were the people in this area where you live consulted when decisions were taken about the provision of basic water and sanitation to this area? Which of the following was used?

Q.B1,B2

Informal Settlements

Rights as resident of Cape Town

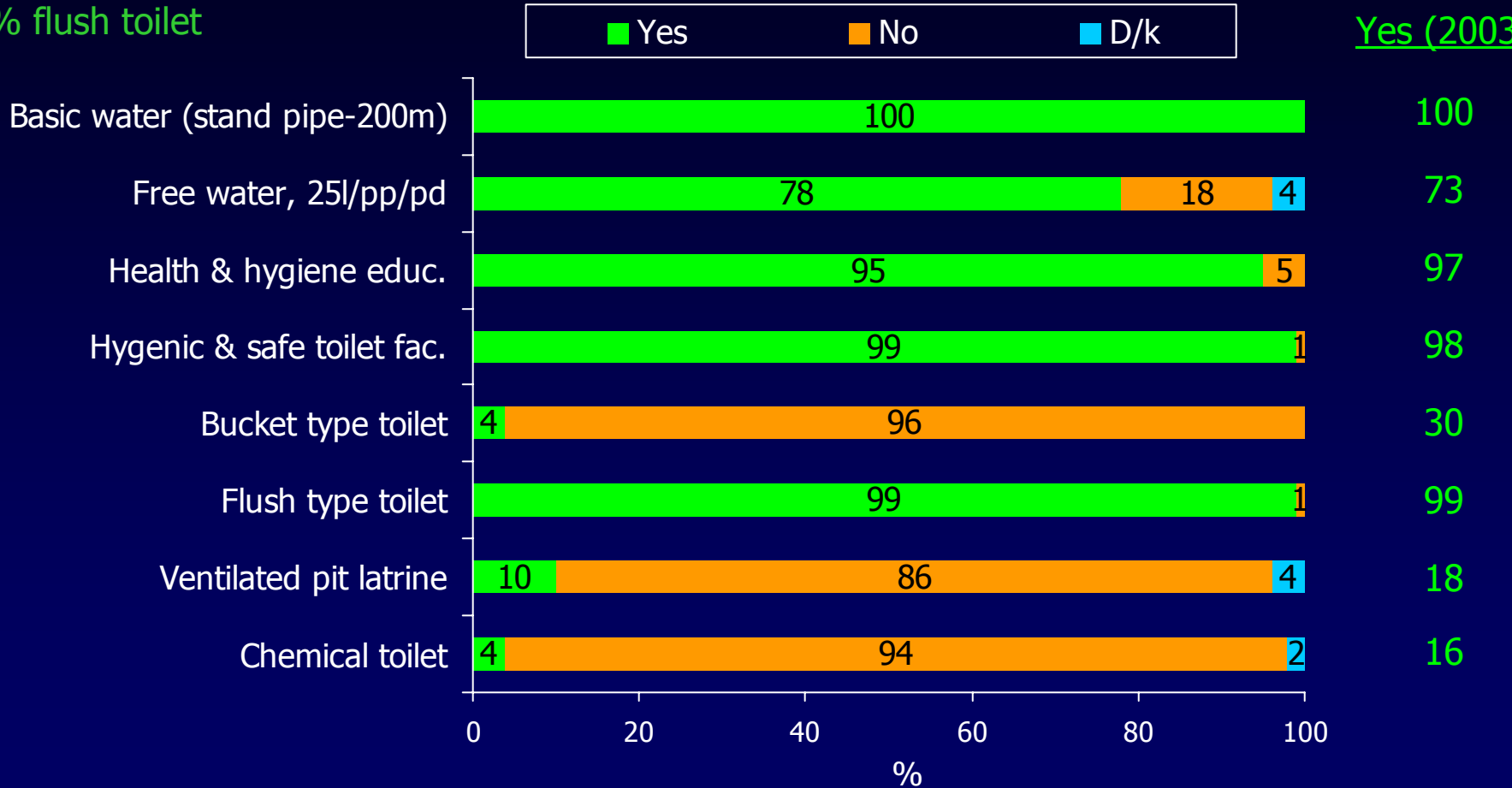
Water Services - aided

spontaneous:

75% own water tap

66% flush toilet

Base: All informants



Source: Project Puddle '03, '04 n=100, n=100

Q.B5



Which of the following services do you believe are part of your rights as a resident of Cape Town?

Informal Settlements

Closest tap

Base: All informants

2003 2004

Number of steps to the closest tap:

| | | |
|----------------|----|----|
| 1-24 steps: | 5 | 15 |
| 25-50 steps: | 13 | 19 |
| 51-100 steps: | 28 | 17 |
| 101-200 steps: | 14 | 23 |
| 201-500 steps: | 33 | 20 |
| 501+ steps | 7 | 6 |

In a working order:

| | | |
|------|----|----|
| Yes: | 89 | 89 |
|------|----|----|

Leaking

| | | |
|------|----|----|
| Yes: | 35 | 28 |
|------|----|----|

Source: Project Puddle 2004 n=25

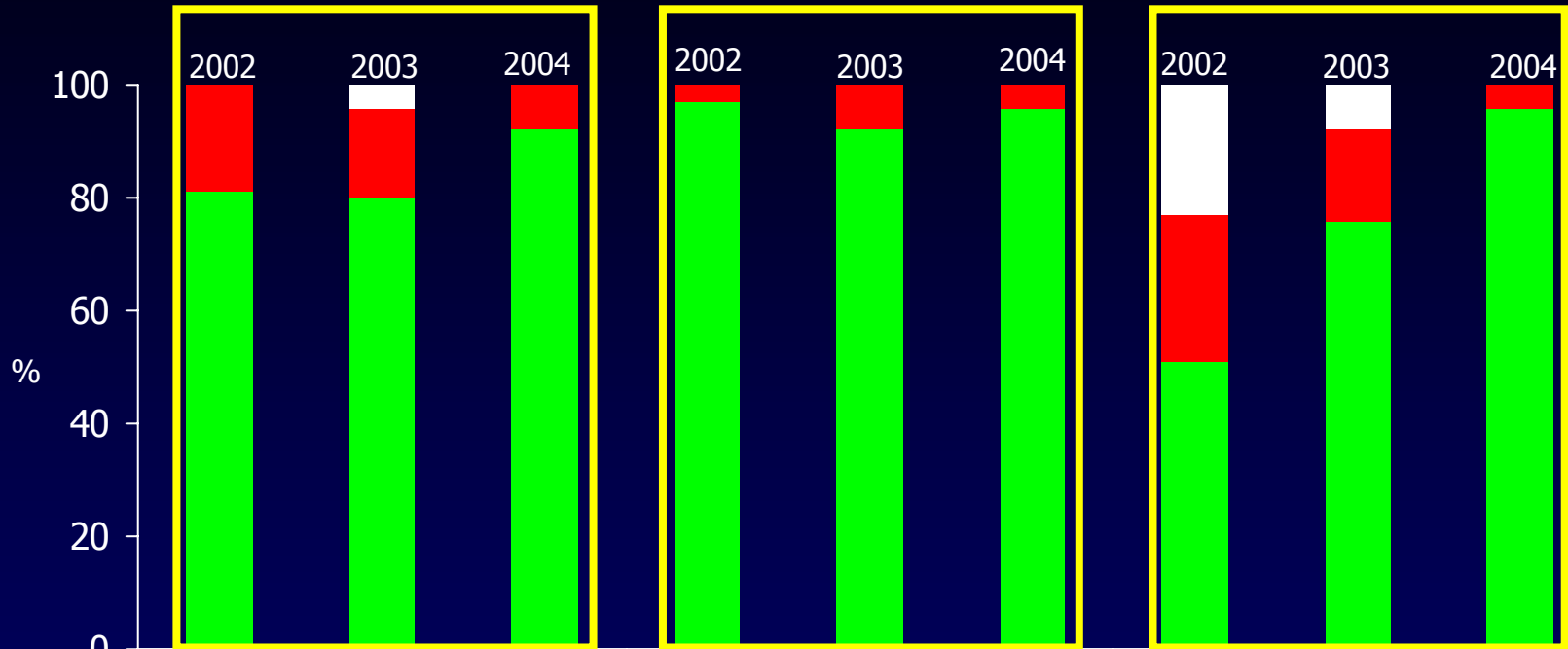
Q.19a,d



Business

Levels of satisfaction

Base: All informants



Overall performance

Providing drinking water on tap

Maintaining sewer drainage system

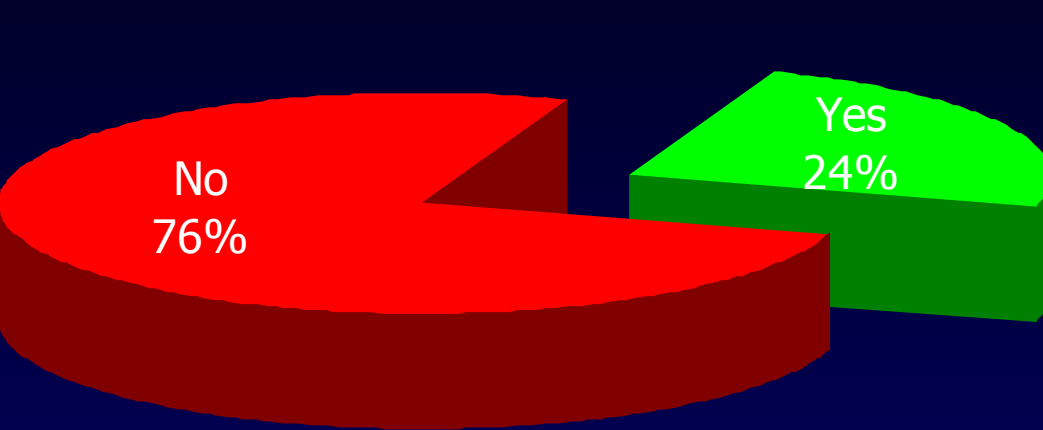
| | | | | | | | | | |
|----------------|----|----|----|----|----|----|----|----|----|
| ■ Not sure | | 4 | | | | 23 | 8 | | |
| ■ Dissatisfied | 19 | 16 | 8 | 3 | 8 | 4 | 26 | 16 | 4 |
| ■ Satisfied | 81 | 80 | 92 | 97 | 92 | 96 | 51 | 76 | 96 |

Source: Project Puddle '02, '03, '04 n=31, 25, 25

How satisfied are you with the overall performance of the City of Cape Town in providing services to residents? ...in providing potable water on tap? In Maintaining the sewer drainage system? ^{Q.1,2,3}

Reason for changing behaviour to conserve water

Base: All informants who changed behaviour



Yes (n=6)

Information provided by government on water conservation

Had to use less, price of services increased

In what way (n=6)

Don't let taps run unnecessarily / turn off irrigation

Regulate water usage by putting water efficient fittings on toilets

Put up stickers saying "Stop Wasting Water"

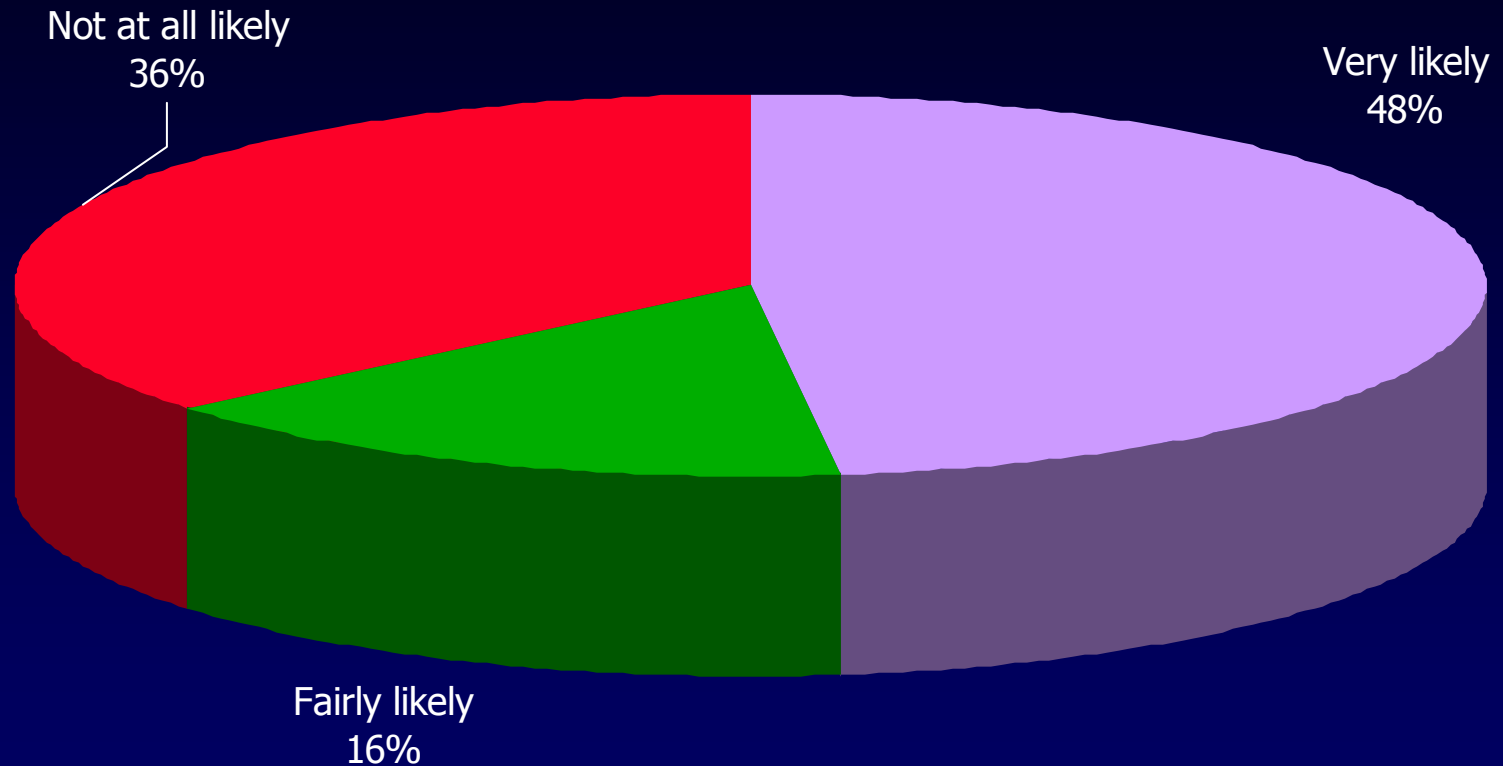
Fix leaks/replace washers immediately

Meter own water

Source: Project Puddle 2004 n=25

Likelihood of using treated waste water for non-drinking at 50% of the price

Base: All informants



Source: Project Puddle '02, '03, '04 n=31, 25, 25



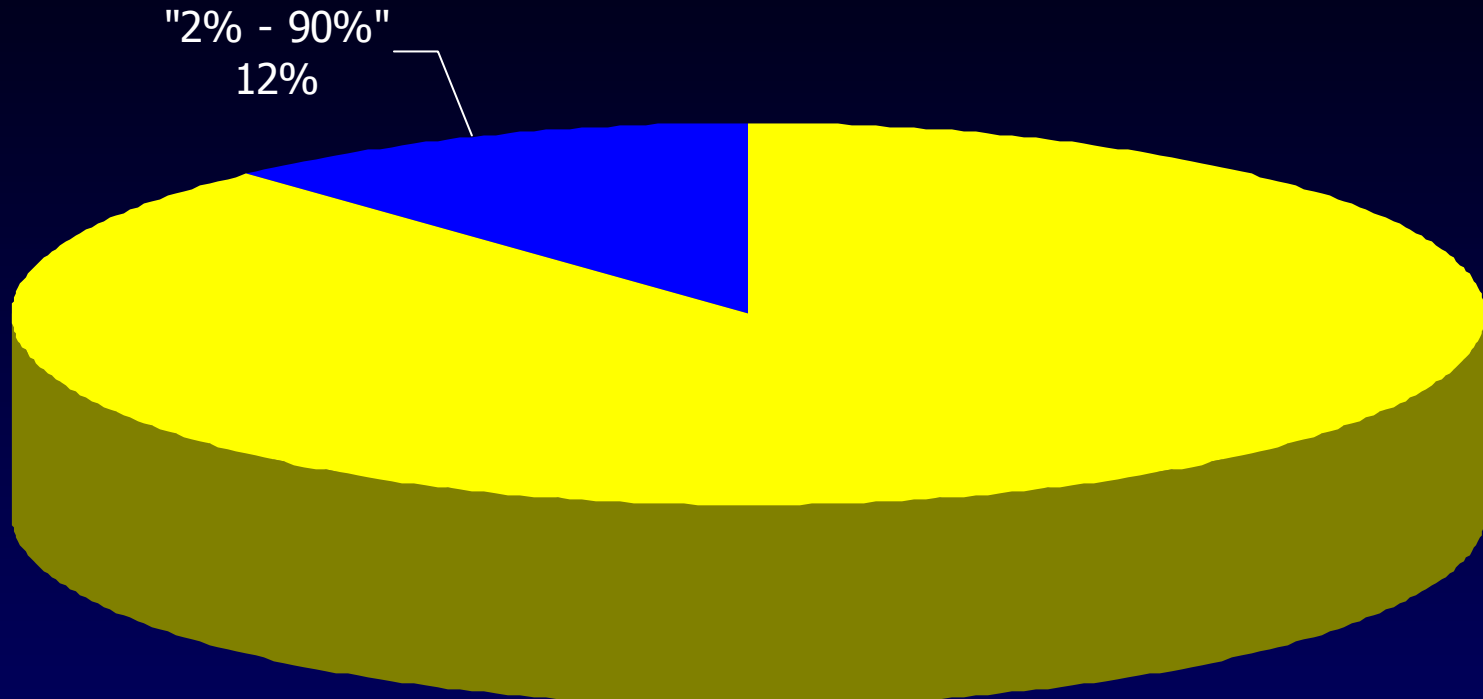
If treated waste water was available for non-drinking purposes, at 50% of the price, how likely would you be to use it?

Q.21

Business

Percentage of water that businesses recycle

Base: All informants



"0"
88%

"2% - 90%"
12%

| | <u>2002</u> | <u>2003</u> |
|----------|-------------|-------------|
| "0" | 65 | 84 |
| "2%-90%" | 35 | 16 |

Source: Project Puddle '02, '03, '04 n=31, 25, 25

What percentage of water, if at all, does your business recycle?

Q.22

Areas that *Business* feels, City of Cape Town should give special attention to

Nothing (92%)

Better / quick service regarding maintenance and repairs

Business should be more strictly controlled when using water

Municipality should be more careful themselves with wasting water, eg. watering public gardens whilst raining

Areas to concentrate on (residents) ...

1. *Ensure that water services are affordable* – seems to be a growing number of residents who perceive water in Cape Town to cost the same or **more** than in the rest of South Africa
2. *Provide informative, accurate billings based on monthly meter readings* – whilst most never calculate the amounts on the accounts, almost 1 in every 2 people who receive an account, believe that it is accurate almost always, **but not every time**
3. *Ensure that people adhere to legislation regulating the use/misuse of water* – increased awareness of water restrictions that are in place
4. *Follow-up to see if problems that have been reported, were resolved* – and resolve problems in a reasonable time



Thank You