

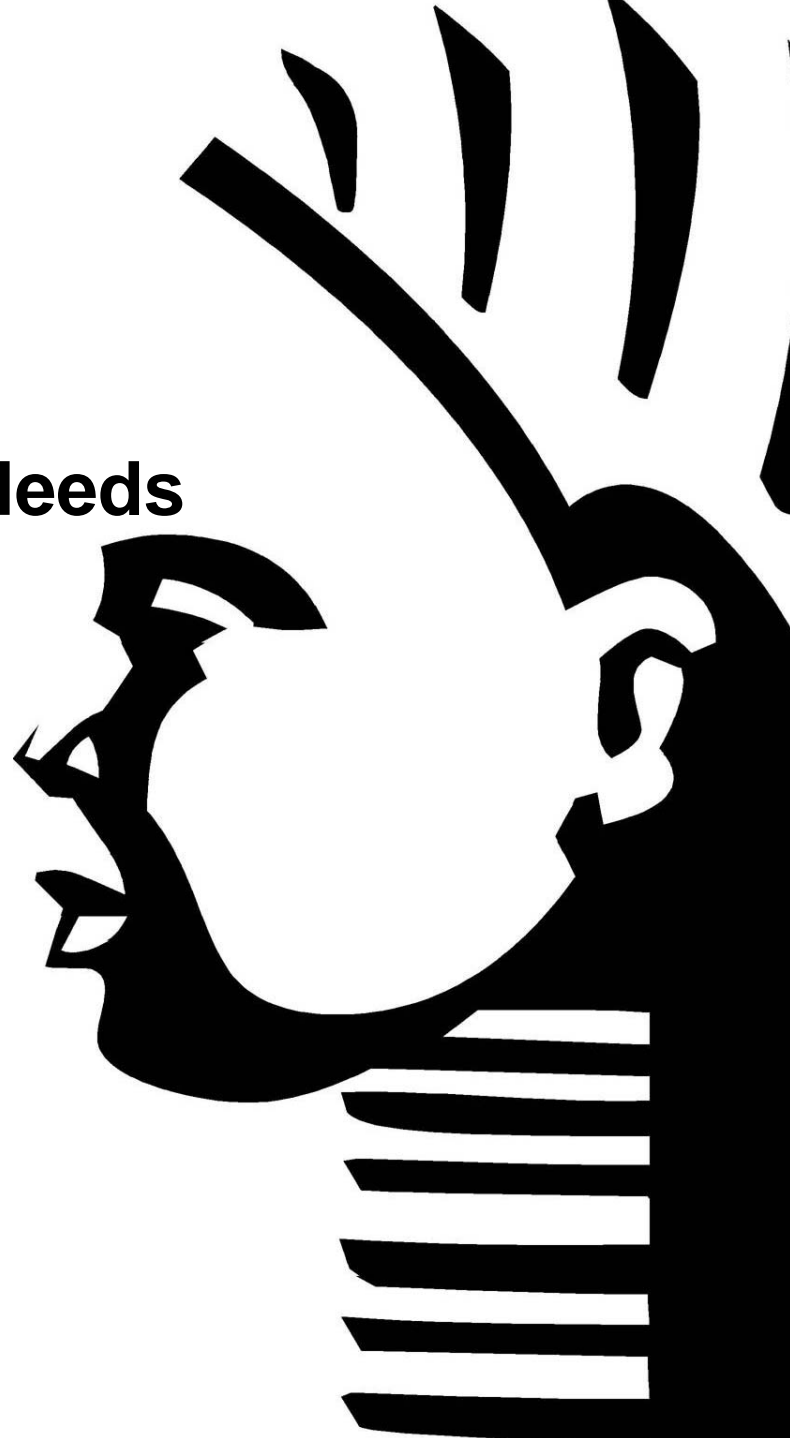


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Customer Perceptions and Needs

Prepared for City of Cape Town
Prepared by Lucas Raganya

Date: May 2006



Structure of Presentation

- Introduction
- Background
- Methodology
- Key Findings
 - Residents
 - New questions added in 2006
- Conclusions



Background



- Tracking survey to investigate needs and perceptions relating to water services
- This is the fourth wave:
 - February and March 2002
 - March to June in 2003
 - May to June in 2004
 - March to May 2006



Methodology



- Residents:
 - A sample of 397 residents, from a database across low, middle and high household types supplied
 - The low household type areas included the following:
 - Crossroads, Dunoon, Langa, Lentegeur, Manenburg, Mfuleni
 - The middle household type areas included the following:
 - Bonny Brook, Bothasig, Goodwood Estate, Kuils River, Oakdale and Shirley Park
 - The high household type areas included the following:
 - Aurora, Bishopscourt, Bloubergstrand, Oranjezicht, Plattekloof, Somerset West
- Personal interviews in the preferred language of respondent, using a semi-structured questionnaire – CAPI (Computer Assisted Personal Interviewing) and PAPI (Pen and Paper Interviews)
- The results are analysed by overall and household types



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Residents





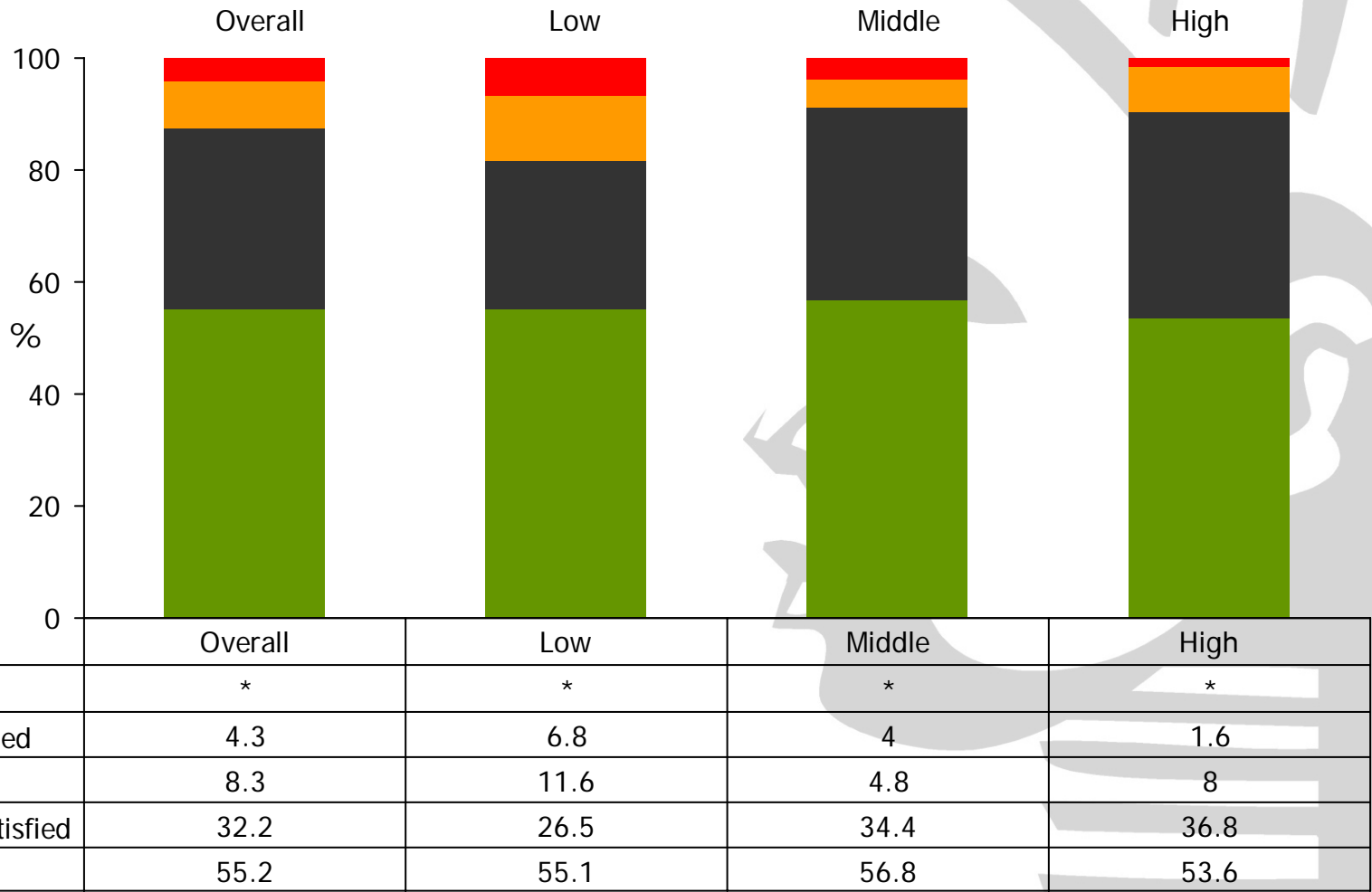
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- 1. Customer satisfaction**
- 2. Behaviour relating to water usage**
- 3. Evaluation of services received**



Satisfaction levels - overall performance

Overall & household type



High satisfaction levels of 80%+, a notable dissatisfaction among low household type residents

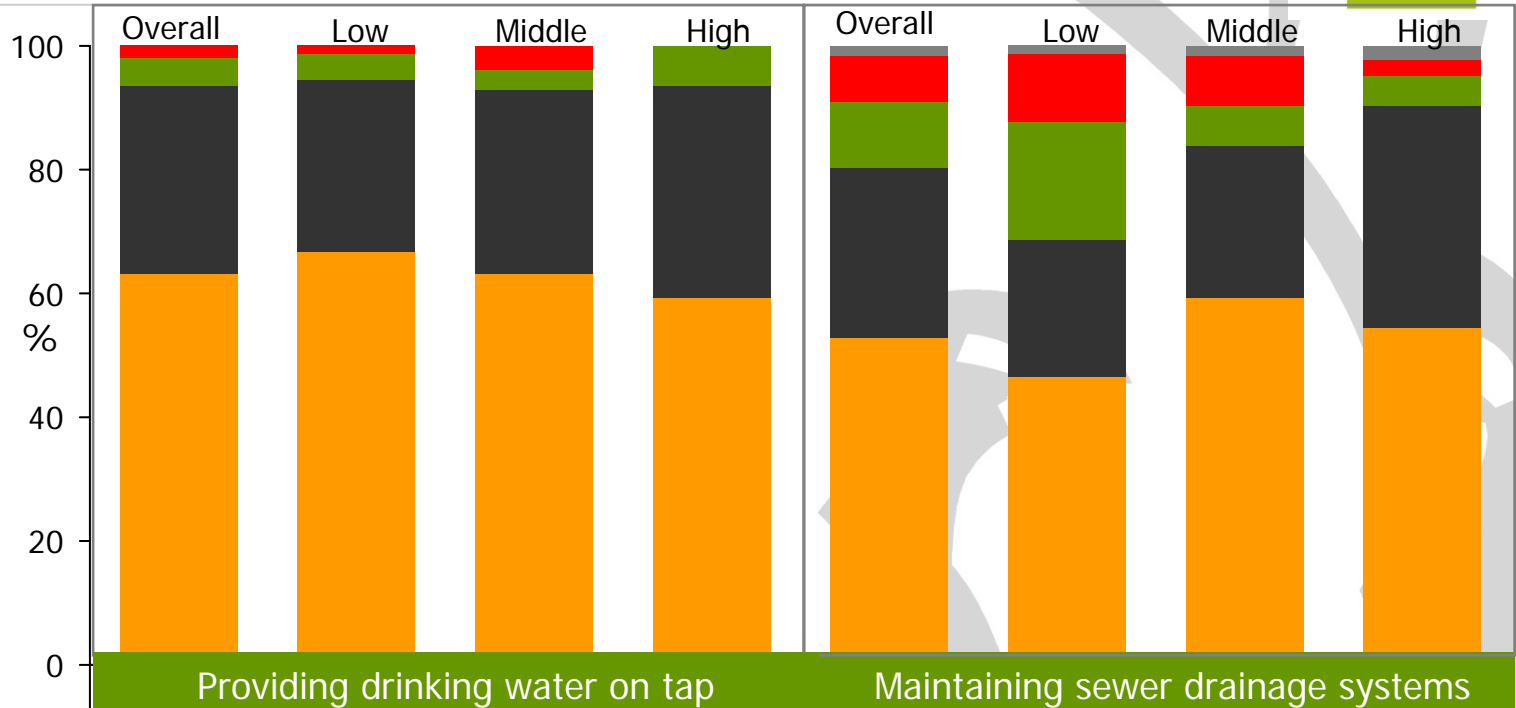
Q.1a

Source: Project Water n=397

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

Satisfaction – water and sewer drainage systems

Overall & household type



| | Providing drinking water on tap | | | | Maintaining sewer drainage systems | | | |
|--------------------|---------------------------------|------|--------|------|------------------------------------|------|--------|------|
| | Overall | Low | Middle | High | Overall | Low | Middle | High |
| Not sure | * | * | * | * | 1.8 | 1.4 | 1.6 | 2.4 |
| Very dissatisfied | 1.8 | 1.4 | 4 | * | 7.3 | 10.9 | 8 | 2.4 |
| Dissatisfied | 4.5 | 4.1 | 3.2 | 6.4 | 10.6 | 19 | 6.4 | 4.8 |
| Somewhat satisfied | 30.5 | 27.9 | 29.6 | 34.4 | 27.5 | 22.4 | 24.8 | 36 |
| Very satisfied | 63.2 | 66.7 | 63.2 | 59.2 | 52.9 | 46.3 | 59.2 | 54.4 |

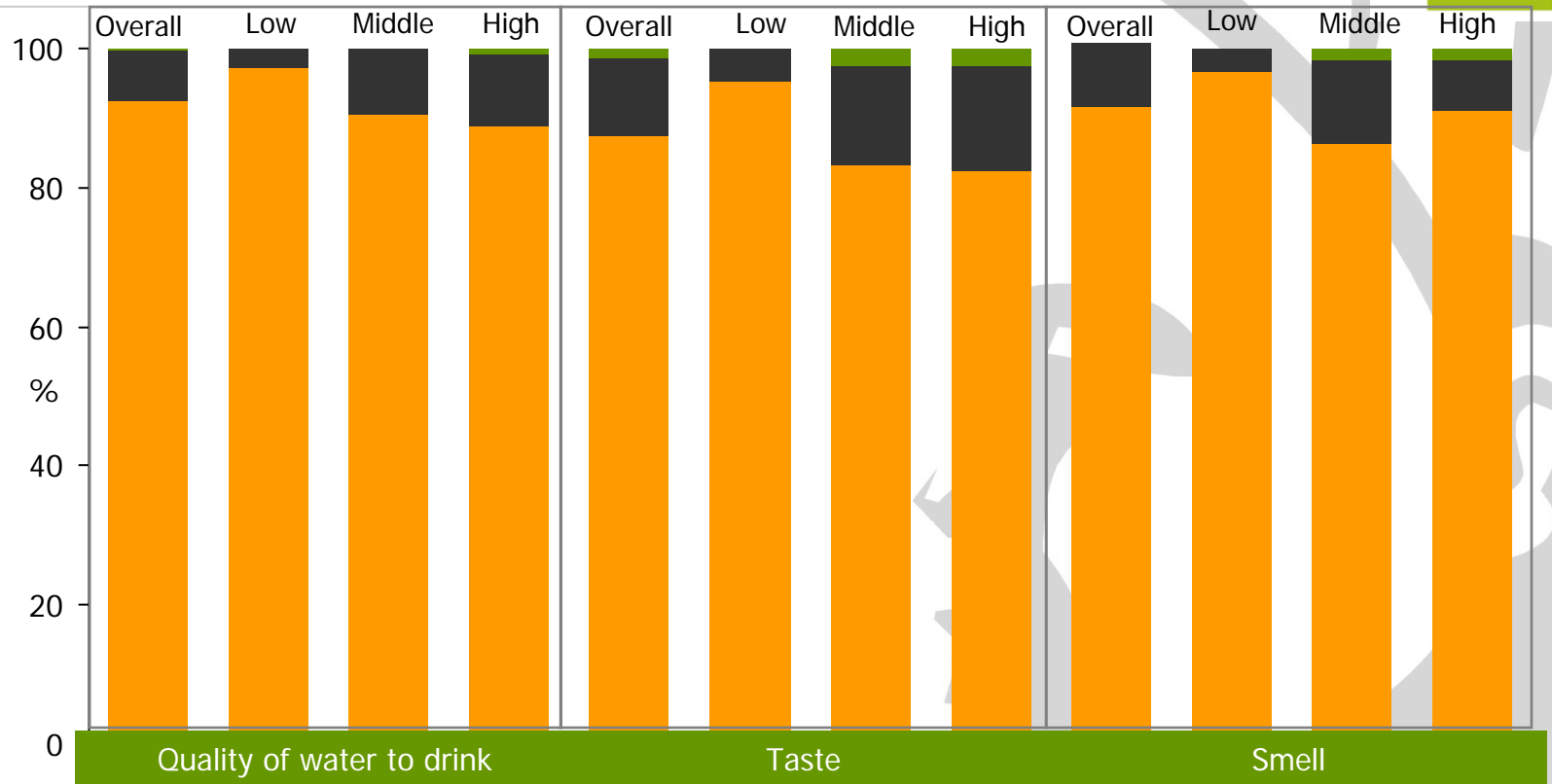
Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

Q.1b, Q1c

How satisfied are you with the overall performance of the City of Cape Town in providing drinking water on tap to residents / maintaining sewer drainage system?

Satisfaction levels – water

Overall & household type



| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
|--------------|---------|------|--------|------|---------|------|--------|------|---------|------|--------|------|
| Not sure | 0.3 | * | * | 0.8 | 1.5 | * | 2.4 | 2.4 | 1 | * | 1.6 | 1.6 |
| Dissatisfied | 7.3 | 2.7 | 9.6 | 10.4 | 11.1 | 4.8 | 14.4 | 15.2 | 11.3 | 3.4 | 12 | 7.2 |
| Satisfied | 92.4 | 97.3 | 90.4 | 88.8 | 87.4 | 95.3 | 83.2 | 82.4 | 91.7 | 96.6 | 86.4 | 91.2 |

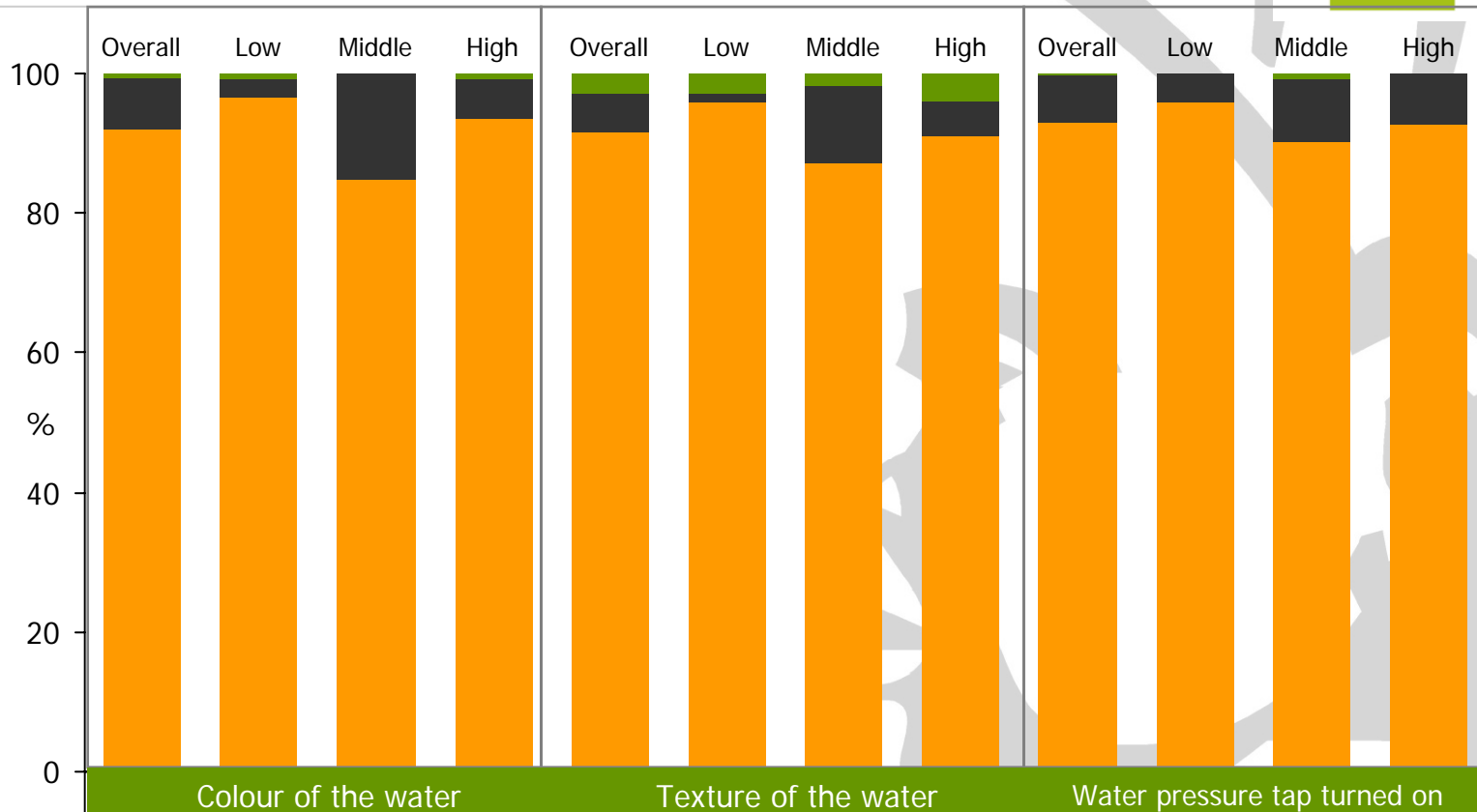
Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

Q6a

How satisfied or dissatisfied are you with each of the following?

Satisfaction levels – water

Overall & household type



| | Colour of the water | | | | Texture of the water | | | | Water pressure tap turned on | | | |
|--------------|---------------------|------|--------|------|----------------------|------|--------|------|------------------------------|------|--------|------|
| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
| Not sure | 0.5 | 0.7 | * | 0.8 | 2.8 | 2.7 | 1.6 | 4 | 0.3 | * | 0.8 | * |
| Dissatisfied | 7.6 | 2.7 | 15.2 | 5.6 | 5.6 | 1.4 | 11.2 | 4.8 | 6.6 | 4.1 | 8.8 | 7.2 |
| Satisfied | 91.9 | 96.6 | 84.8 | 93.6 | 91.7 | 95.9 | 87.2 | 91.2 | 93.2 | 95.9 | 90.4 | 92.8 |

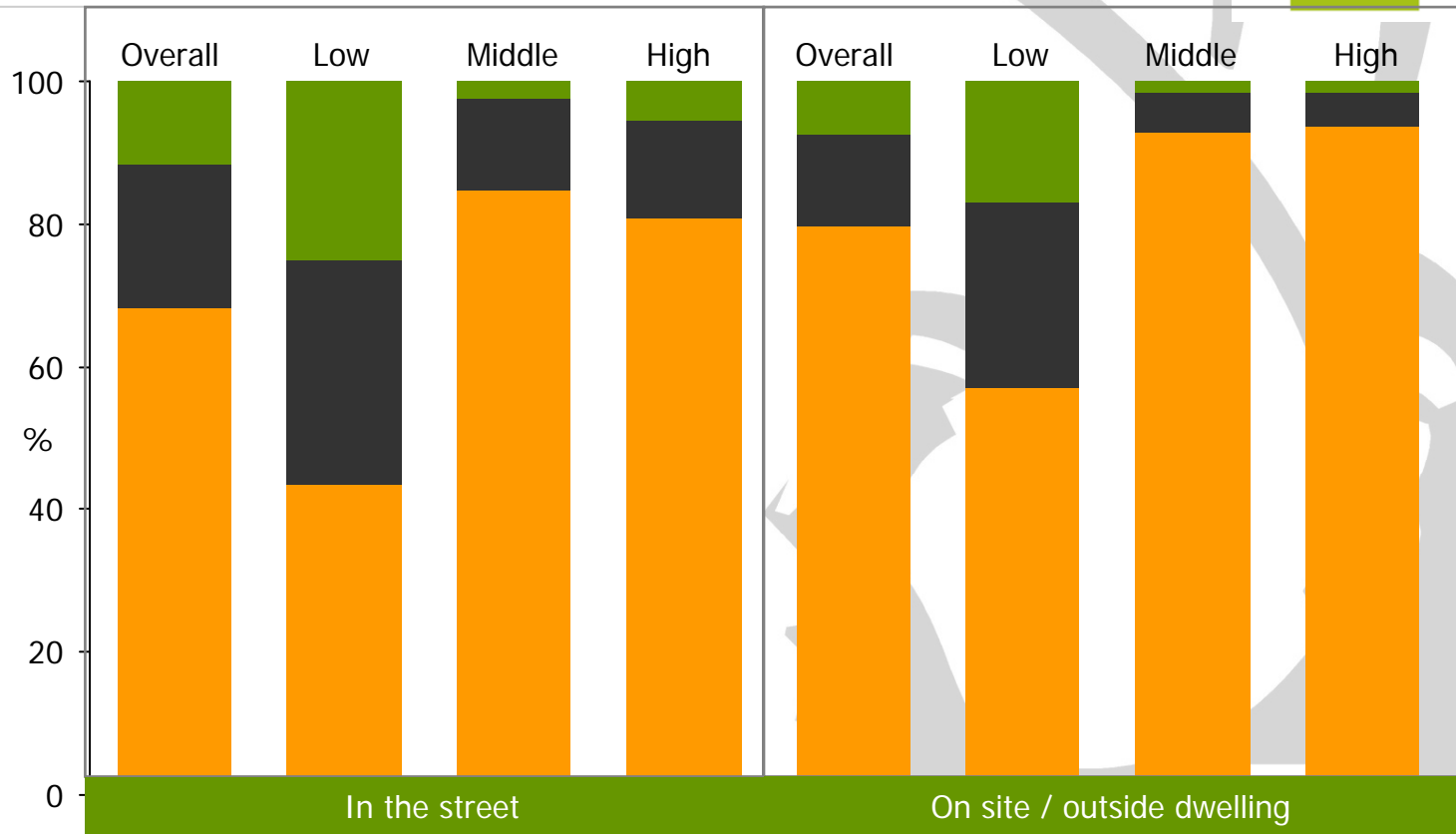
Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

How satisfied or dissatisfied are you with each of the following?

Q6a

Frequency of problems with water leakages

Overall & household type



| | Overall | Low | Middle | High | Overall | Low | Middle | High |
|--------------------|---------|------|--------|------|---------|------|--------|------|
| Up to once a month | 11.8 | 25.2 | 2.4 | 5.6 | 7.4 | 17 | 1.6 | 1.6 |
| Every few months | 19.9 | 31.3 | 12.8 | 13.6 | 12.8 | 25.9 | 5.6 | 4.8 |
| Never | 68.3 | 43.5 | 84.8 | 80.8 | 79.8 | 57.1 | 92.8 | 93.6 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

How often do you experience problems with water leakages?

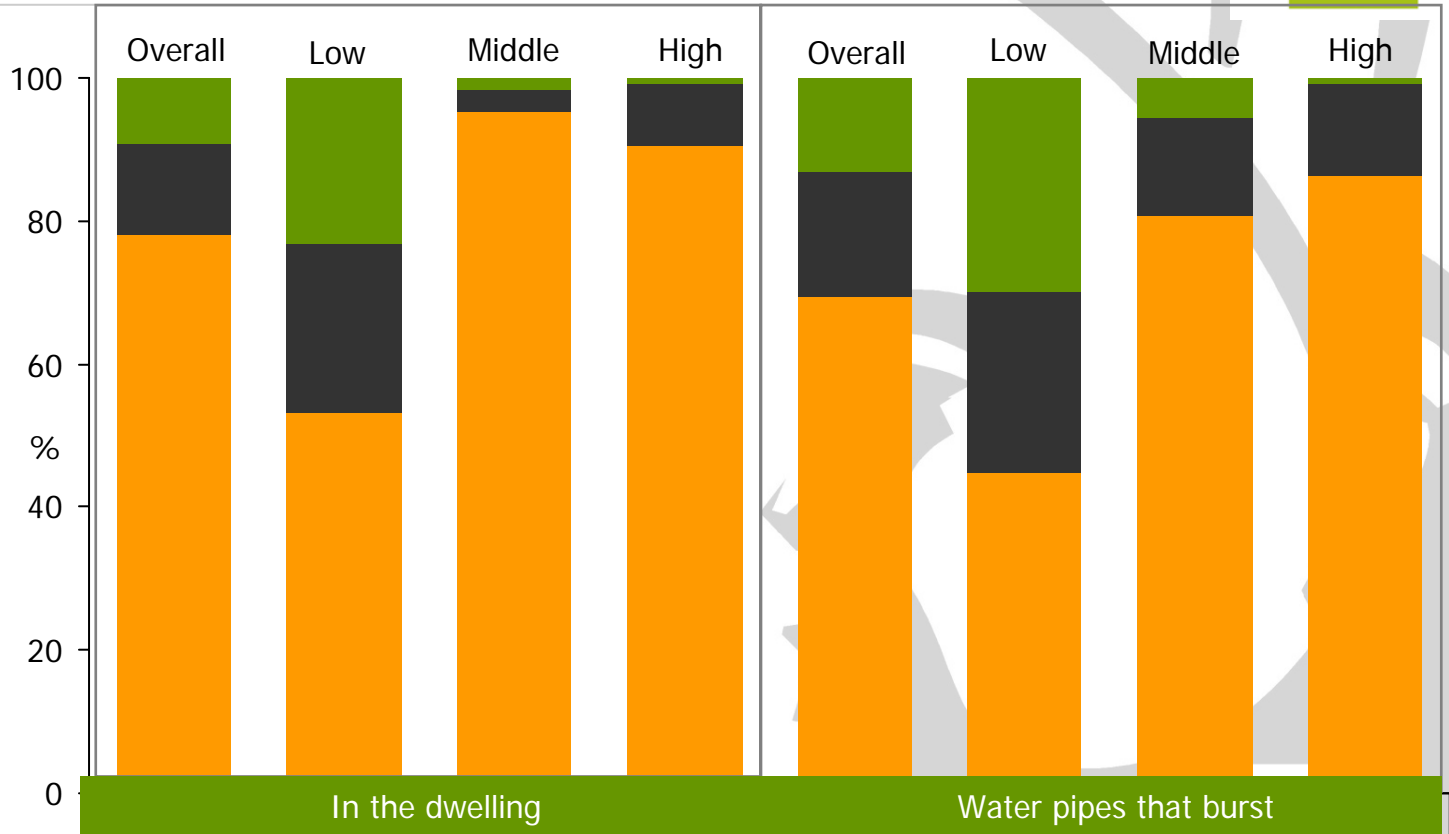
Q2a

Frequency of problems with water leakages

Overall & household type



The respondents' awareness of "once a month frequency water leakage" among low household type residents is high. This is an indication of the deteriorating condition of infrastructure and lack of preventative maintenance and infrastructure replacement programmes



| | Overall | Low | Middle | High | Overall | Low | Middle | High |
|----------------------|---------|------|--------|------|---------|------|--------|------|
| ■ Up to once a month | 9.4 | 23.1 | 1.6 | 1 | 13.2 | 29.9 | 5.6 | 1 |
| ■ Every few months | 12.6 | 23.8 | 3.2 | 8.8 | 17.6 | 25.2 | 13.6 | 12.8 |
| ■ Never | 78.1 | 53.1 | 95.2 | 90.4 | 69.3 | 44.9 | 80.8 | 86.4 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

Q2a, Q2b

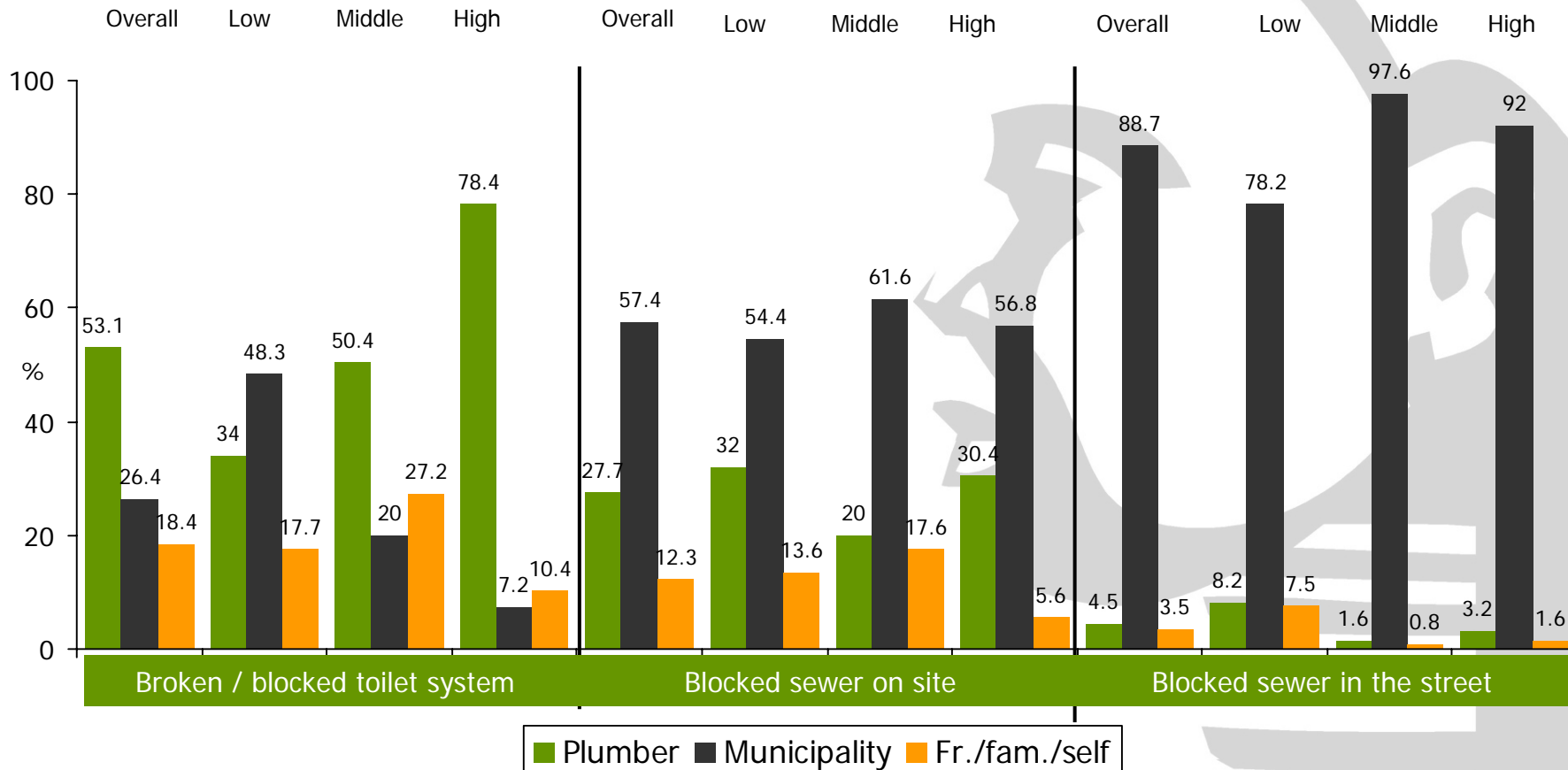
How often do you experience problems with water leakages?

Contact when problems are experienced

Overall & household type



The majority of residents would contact the Municipality when experiencing a blocked sewer in the street



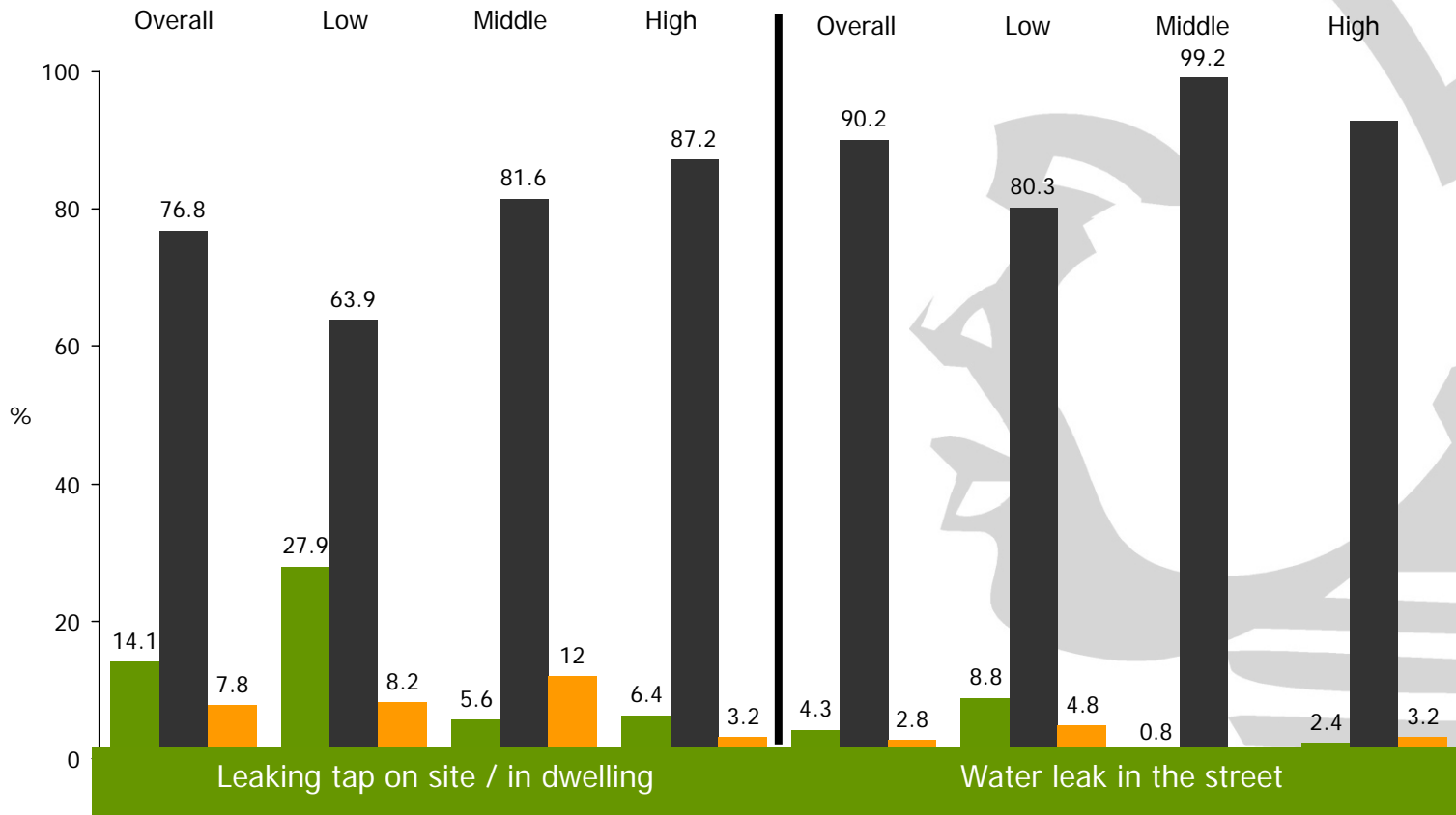
Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

Contact when problems are experienced

Overall & household type



The majority of residents would contact the Municipality when experiencing a water leak in the street



Source: Project Water '06 n=397

Who would you contact when you experience...?



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1. Customer satisfaction

2. Behaviour relating to water usage

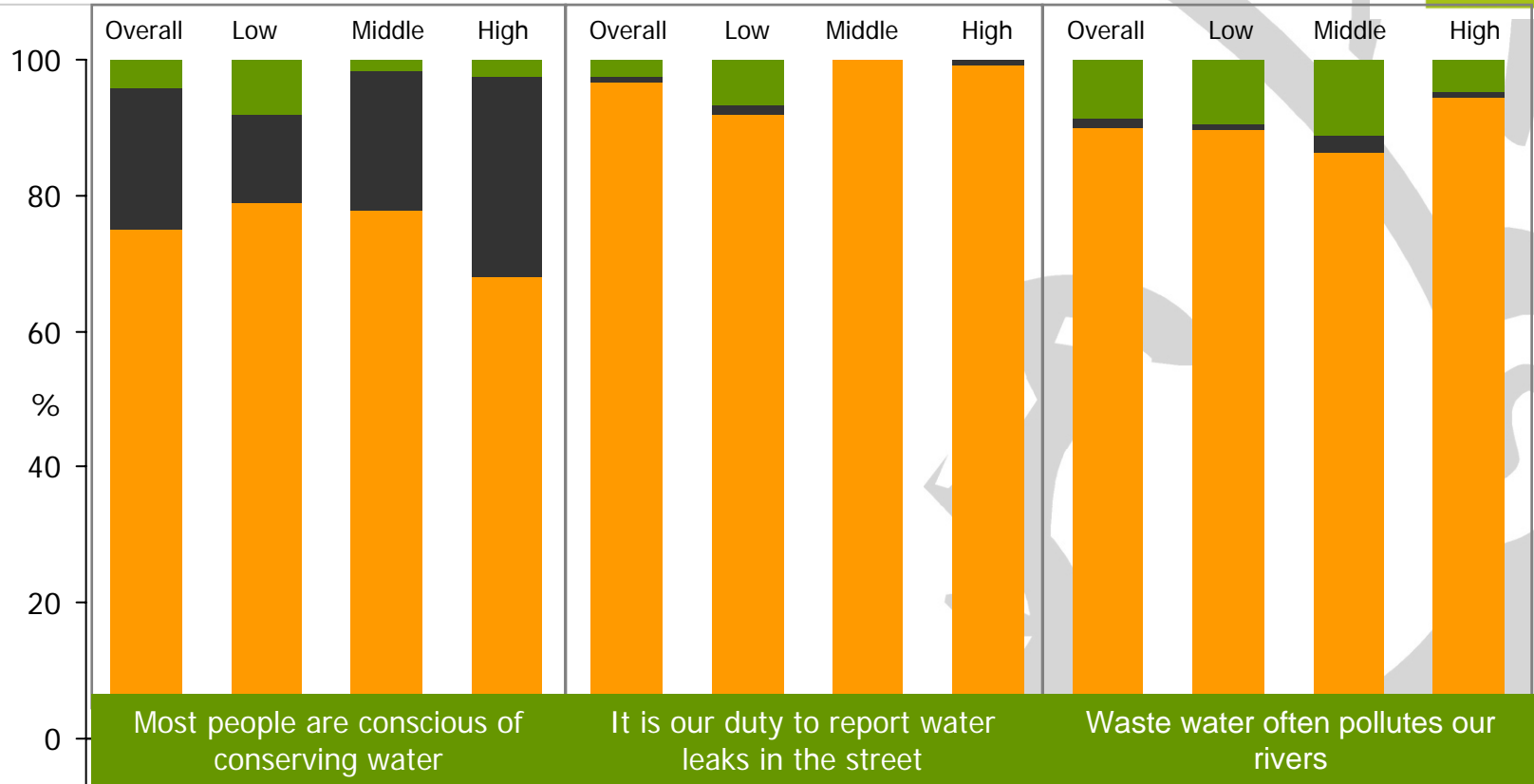
3. Evaluation of services received



Perceptions

Overall & household type

Some of the residents still *disagree* that most people are conscious of conserving water. Public awareness and education should be stepped up to promote behavior change in this regard



| | | | | | | | | | | | | |
|------------|------|------|------|------|------|------|-----|------|------|------|------|------|
| ■ Not sure | 4.3 | 8.2 | 1.6 | 2.4 | 2.5 | 6.8 | * | * | 8.6 | 9.5 | 11.2 | 4.8 |
| ■ Disagree | 20.7 | 12.9 | 20.8 | 29.6 | 0.8 | 1.4 | * | 0.8 | 1.3 | 0.7 | 2.4 | 0.8 |
| ■ Agree | 75 | 78.9 | 77.6 | 68 | 96.7 | 91.9 | 100 | 99.2 | 90.1 | 89.8 | 86.4 | 94.4 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

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

Perceptions

Overall & household type

More are not sure whether CT water costs less, same / more than rest of SA. The majority agree that they generally pay too much for water. The favorable relationship of the City of Cape Town's water and sewer cost with other cities need to be promoted



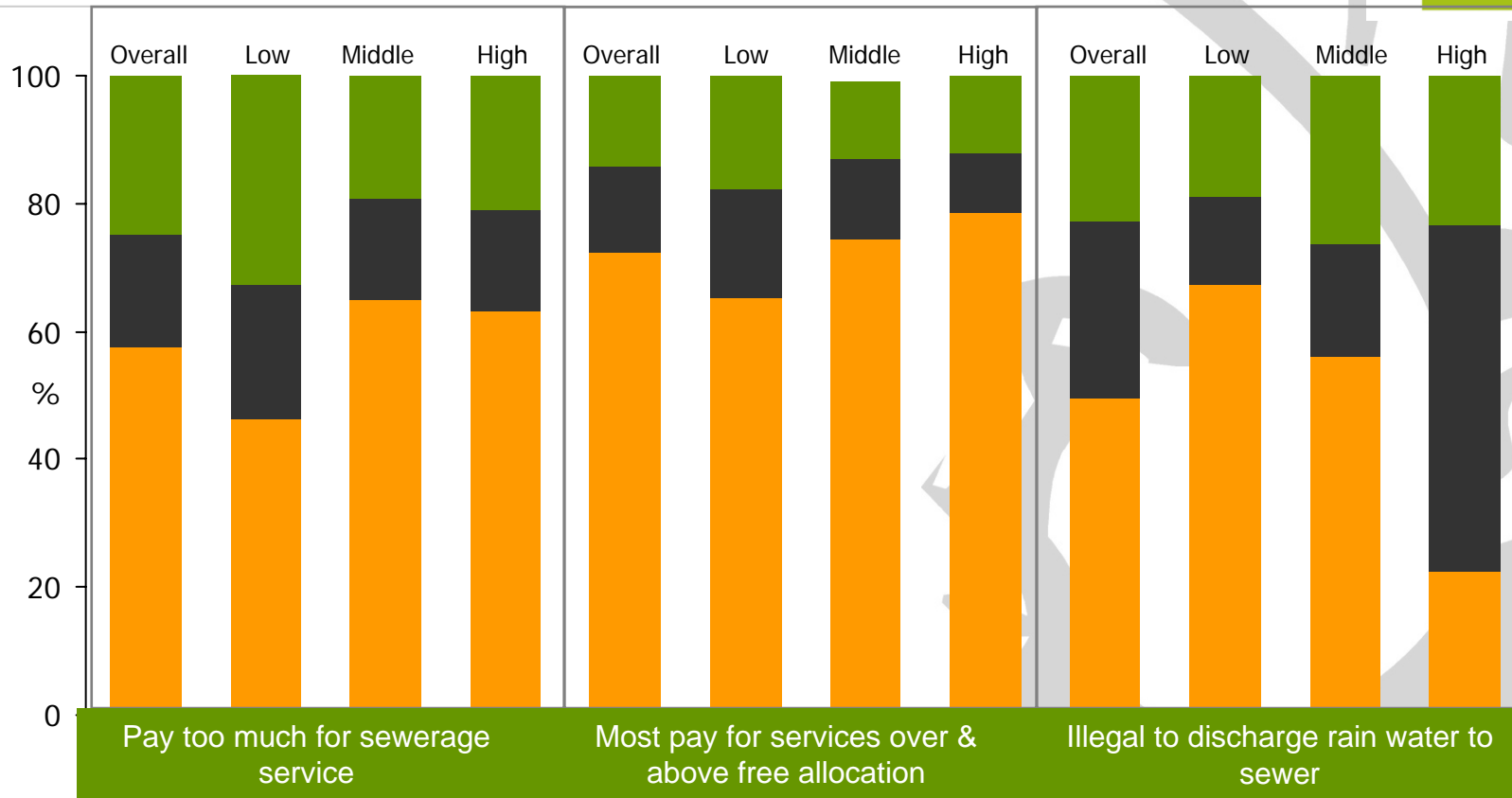
Source: Project Water '03, '04, '06 n=520, 400, 397

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

Perceptions

Overall & household type

More agree that they pay too much for sewerage services and that they pay for services on top of the free allocation. Public awareness should be stepped up among high household type residents who mostly disagree that it is illegal to discharge rain water to the sewer system



| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
|----------|---------|------|--------|------|---------|------|--------|------|---------|------|--------|------|
| Not sure | 24.7 | 32.7 | 19.2 | 20.8 | 14.1 | 17.7 | 12 | 12 | 22.7 | 19 | 26.4 | 23.2 |
| Disagree | 17.8 | 21.1 | 16 | 16 | 13.6 | 17 | 12.6 | 9.6 | 27.7 | 13.6 | 17.6 | 54.4 |
| Agree | 57.4 | 46.3 | 64.8 | 63.2 | 72.3 | 65.3 | 74.4 | 78.4 | 49.6 | 67.4 | 56 | 22.4 |

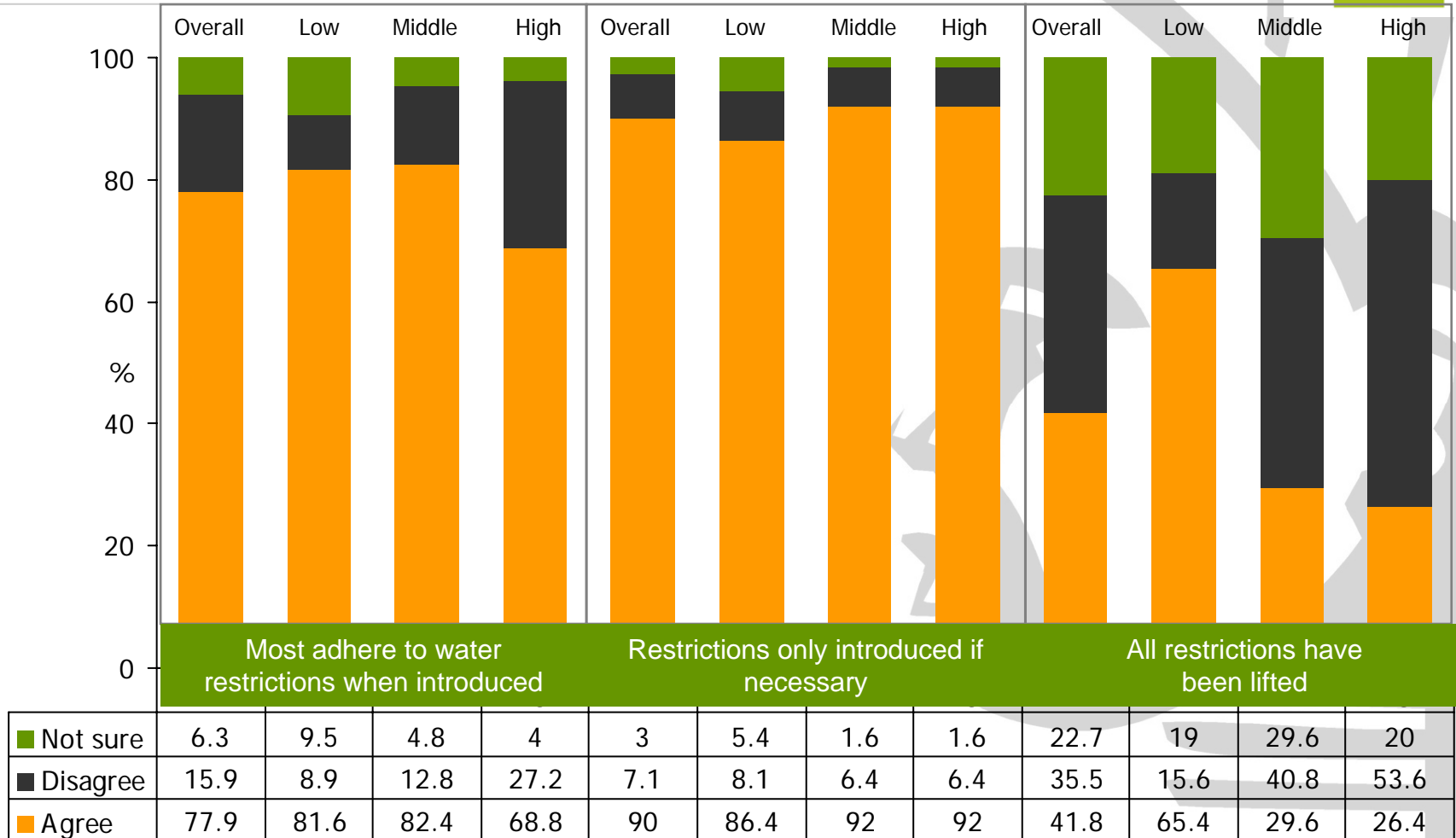
Source: Project Water '03, '04, '06 n=520, 400, 397

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

Perceptions

Overall & household type

Majority agree that most people adhere to water restrictions and that restrictions should be introduced only if necessary. Low household type residents are mostly unaware that water restrictions have not been lifted. Public awareness need to be stepped up



Source: Project Water '03, '04, '06 n=520, 400, 397

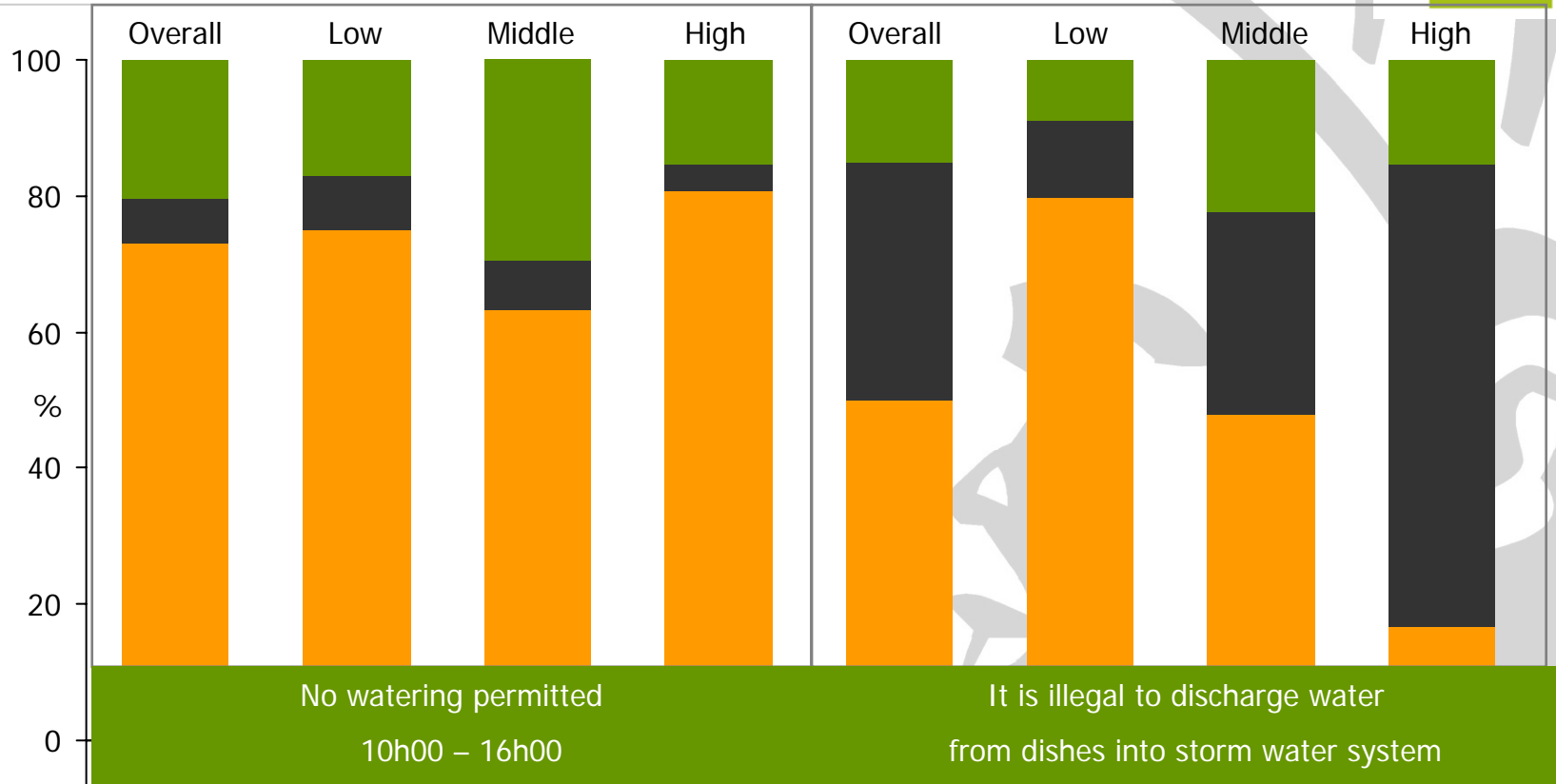
Please tell me to what extent you agree or disagree with each of the following?

There is an increase in the number of people who agree that no watering is permitted between 10h00 and 16h00



Perceptions

Overall & household type



| | Overall | Low | Middle | High | Overall | Low | Middle | High |
|------------|---------|------|--------|------|---------|------|--------|------|
| ■ Not sure | 20.4 | 17 | 29.6 | 15.2 | 15.1 | 8.8 | 22.4 | 15.2 |
| ■ Disagree | 6.6 | 8.1 | 7.2 | 4 | 35 | 11.6 | 29.6 | 68 |
| ■ Agree | 73 | 74.9 | 63.2 | 80.8 | 49.9 | 79.6 | 48 | 16.8 |

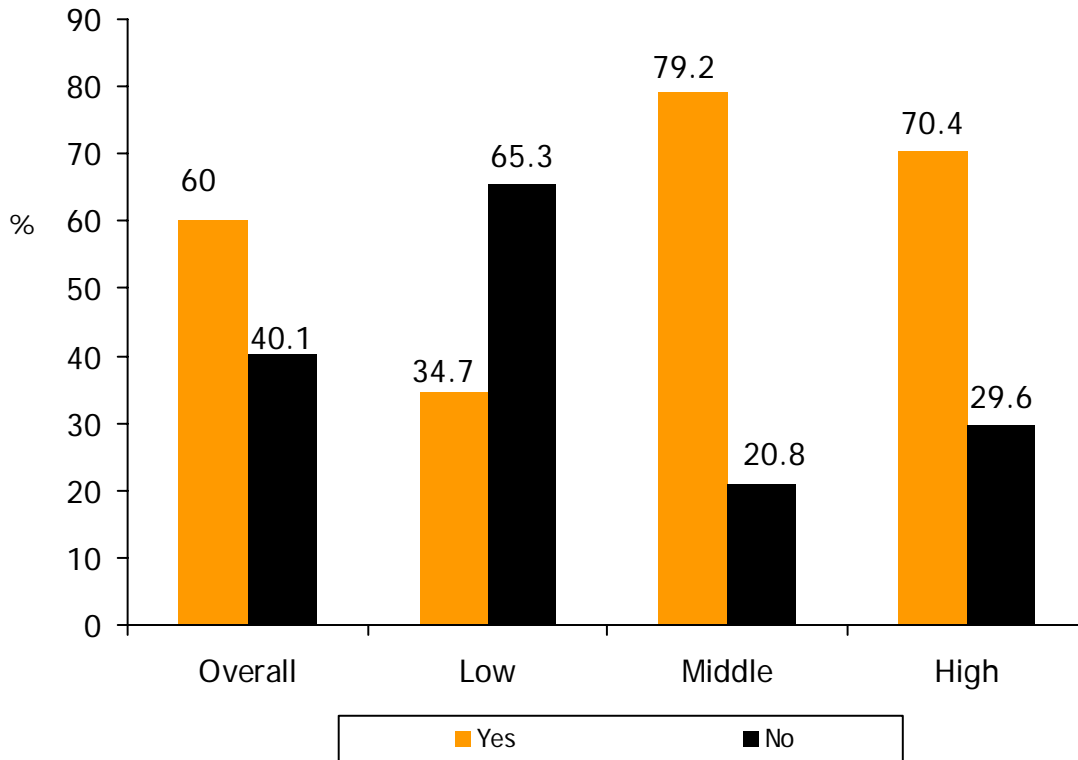
Source: Project Water '03, '04, '06 n=520, 400, 397

Please tell me to what extent you agree or disagree with each of the following?

Q9 and Q8

Behaviour changed to conserve water

Overall & household type



Main reason for changing behaviour - n = 238

Had to use less, price of services increased (Overall = 18%, Low = 28%, Middle = 19% & High 11%)

Information provided by government on water conservation (Overall = 18%, Low = 26%, Middle = 13% & high 19%)

Had to adhere to water restrictions (Overall=62%, Low = 47%, Middle = 68% & High = 66%)

Source: Project Water '06 n=397

Q11b

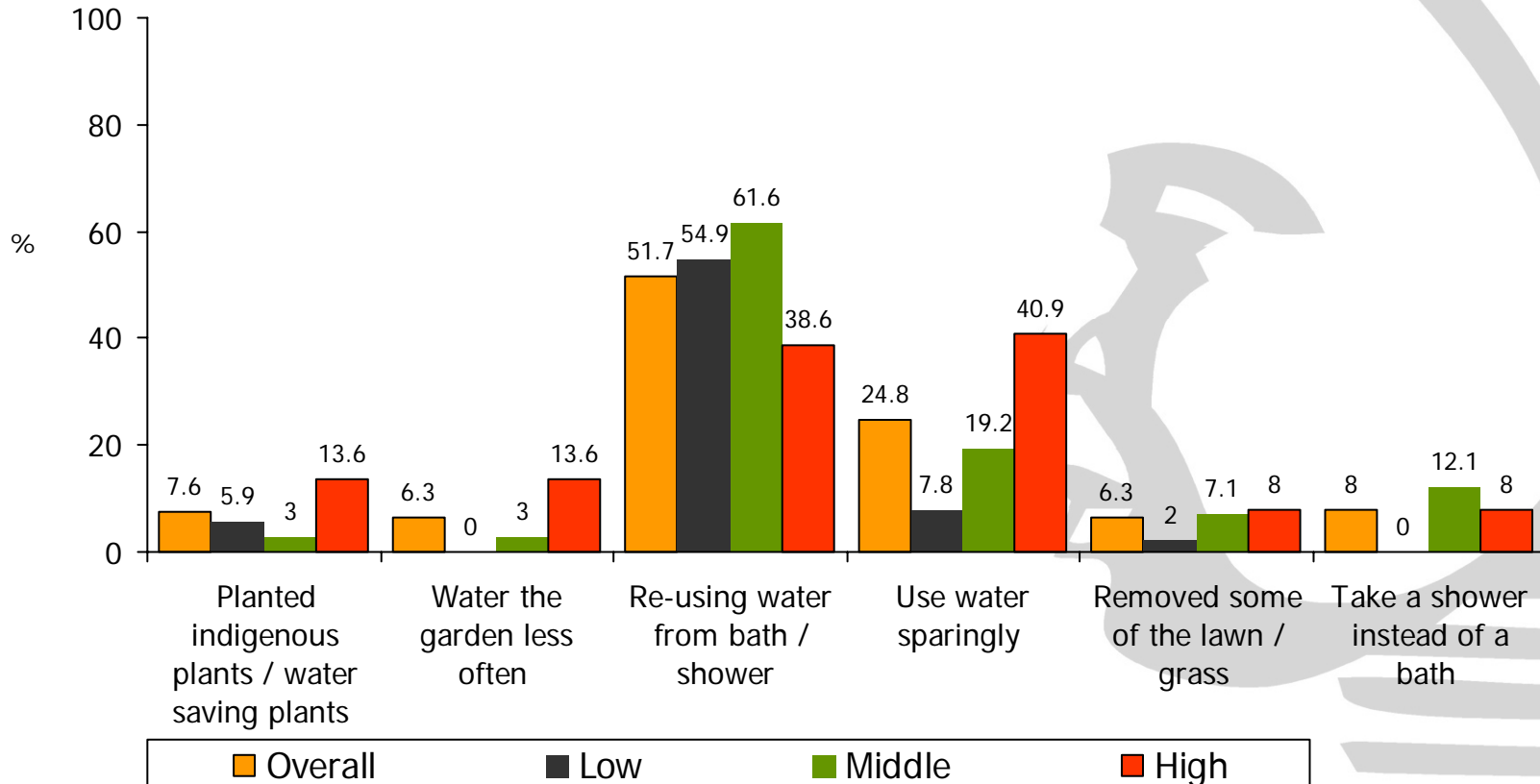
What was your main reason for changing your behaviour to conserve water?

Ways in which behaviour was changed

Overall & household type



60% changed their behaviour to conserve water



Source: Project Water 2006 n= 238

In what way have you / your household changed your behaviour to specifically conserve water over the past year?

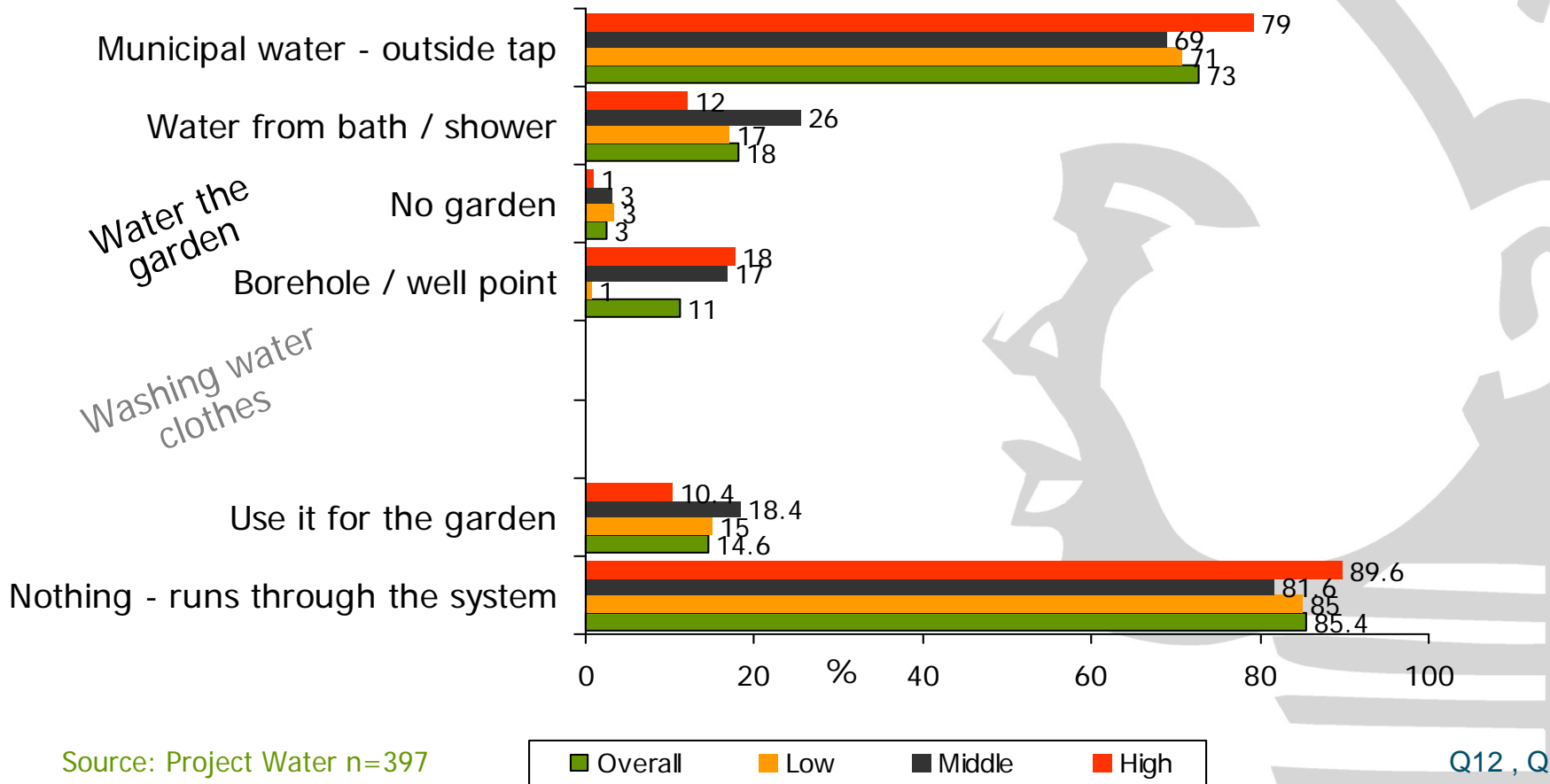
Q11c

Watering the garden / re-use of water

Overall & household type



Increase in the re-use of bath / shower water and borehole or well point



Which of the following do you use to water the garden? What do you usually do with your washing water (dishes / clothes / bath / shower), after use?

Water efficient fittings

Overall & household type

Some awareness and installations,
but low level of commitment



Currently, respondents who have heard of water efficient fittings are 24% overall, 4% from low household type, 25% from middle household type and 49% from high household type

Overall 6% have installed with 6% from low, 2% from middle & 10% from high

Overall 13% are planning to install water efficient fittings, 15% low, 13% middle & 14% high.

Those who plan to install would do so sometime in the future (76% overall, 71% from low, 83% from middle & 70% from high) but are not sure when.

Reasons for NOT planning to install

“never heard of it before” – 18% overall, 13% low, 16% middle & 23% high

“too expensive” – 17% overall, 38% low, 13% middle & 9% high

“no need for it” – 27% overall, 23% low, 27% middle & 30% high

“need more information” – 22% overall, 18% low, 29% middle & 17% high

“already using water sparingly” – 11% overall, 0% low, 11% middle & 17% high

Source: Project Water n=397

*Have you heard of water efficient fittings before? Have you installed any?
Are you planning to? When?, Why not?*

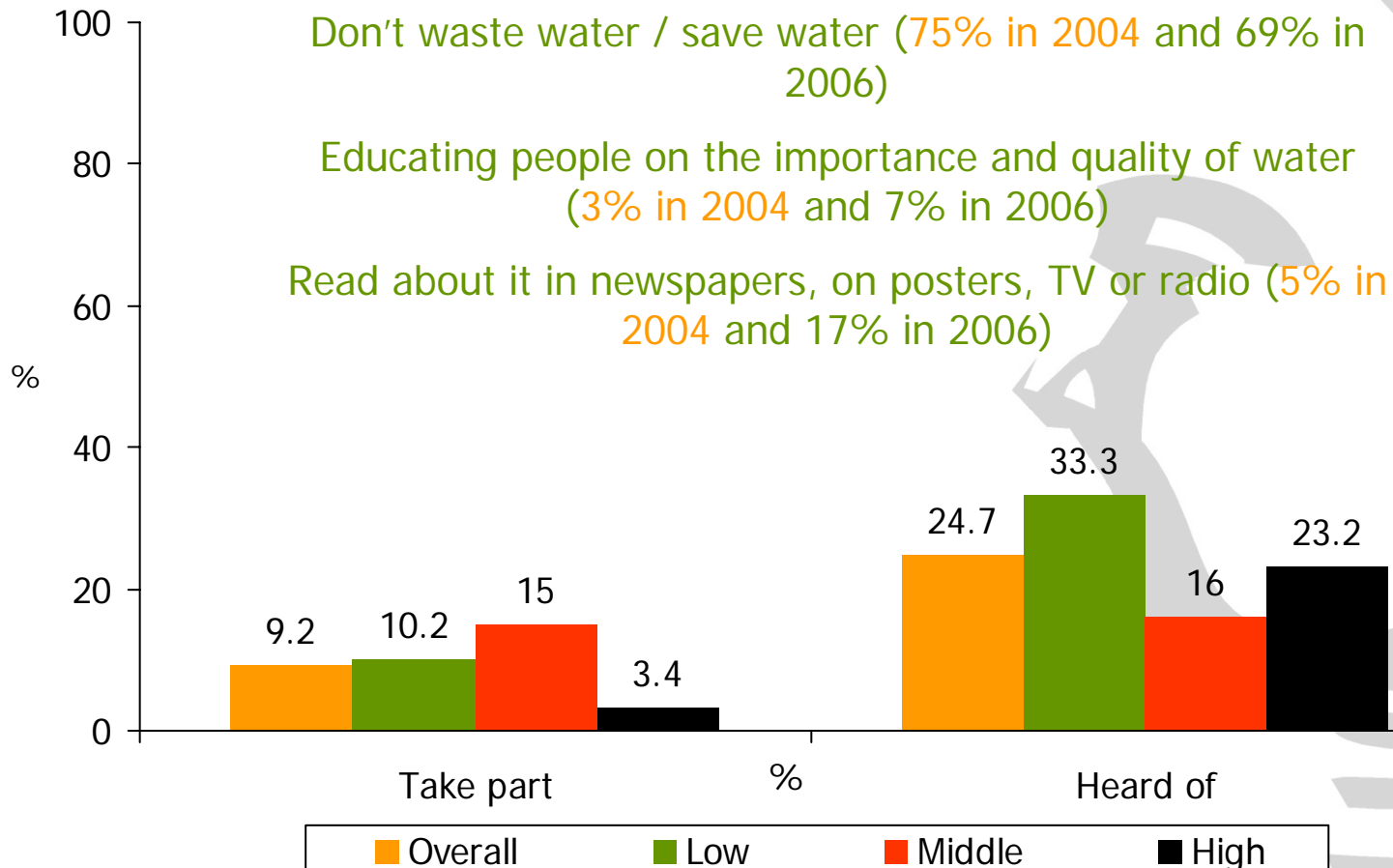
Q11e, Q11f, Q11g, Q11h,
Q11i

Water Week Initiative

Overall & household type



What was heard (n=93)



Source: Project Water 2004 n=400, 2006 n=397

Q10a, Q10c

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

Frequency of bottled water usage reason for buying

Overall & household type



More people in low household types buy bottled water less often or never bought it as compared to people who reside in the other household types

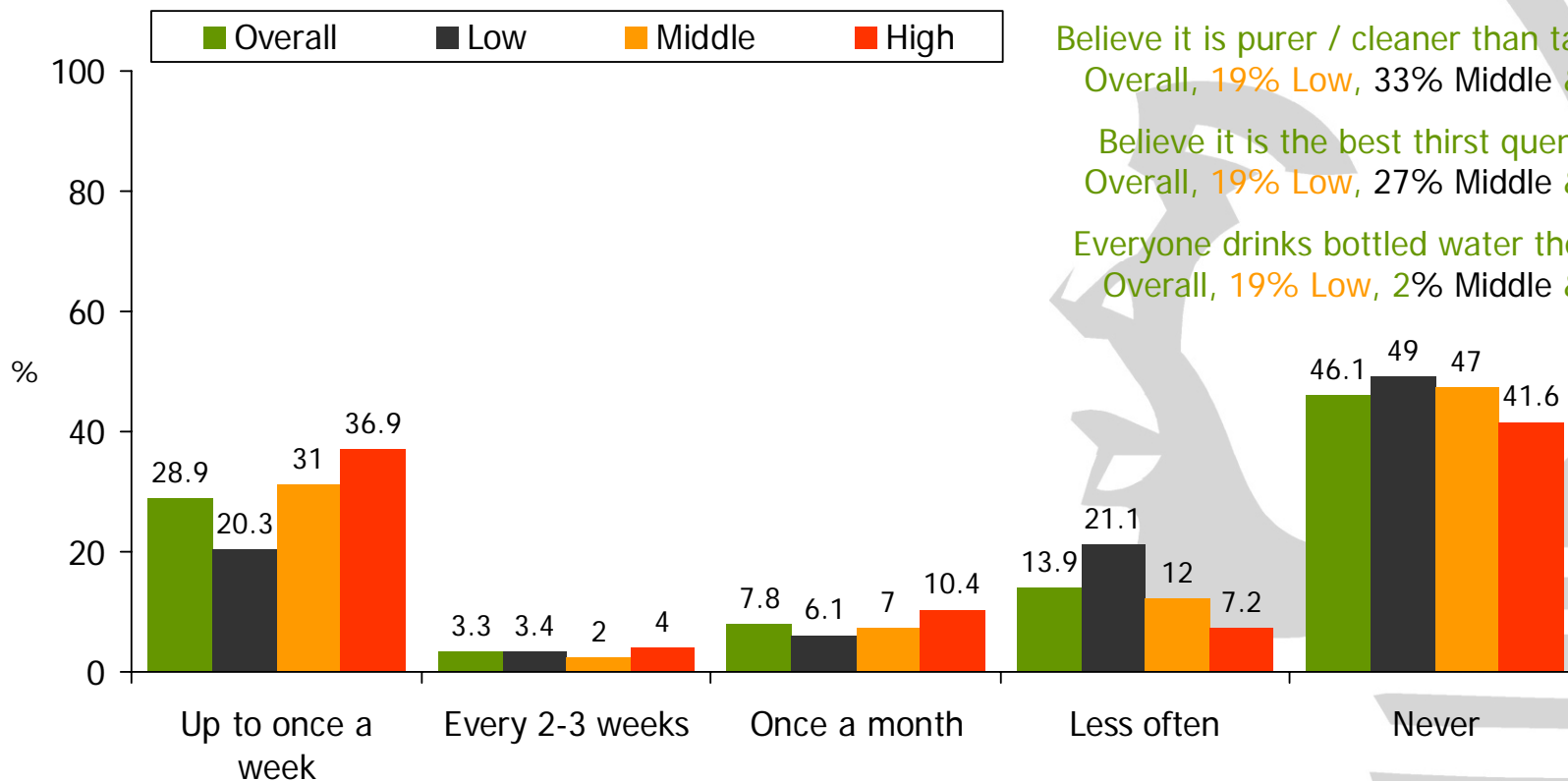
Ever bought (n=217)

Prefer the taste of water to cold drink / other beverages (33% Overall, 41% Low, 29% Middle & 27% High)

Believe it is purer / cleaner than tap water (31% Overall, 19% Low, 33% Middle & 41% High)

Believe it is the best thirst quencher (20% Overall, 19% Low, 27% Middle & 15% High)

Everyone drinks bottled water these days (7% Overall, 19% Low, 2% Middle & 0% High)



Source: Project Water 2004 n=400, 2006 n=397

How often, if ever, do you buy bottled water to drink? Why?

Water or sewer account – received and understood

Overall & household type



Most receive and understand the account, although some in low household type don't

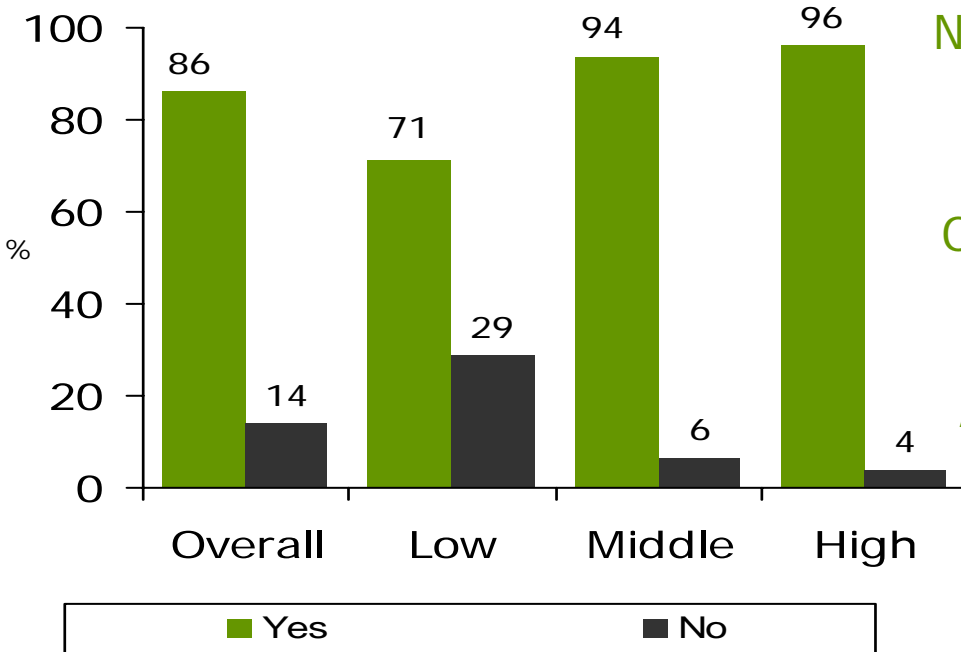
Yes (n=342)

Receive account

Very easy to understand (80% Overall, 63% Low, 87% Middle & 87% High)

Not so easy to understand (11.4% Overall, 14% Low, 9.4% Middle & 11% High)

Almost impossible to understand (9.1% Overall, 23 Low, 3.4% Middle & 3% High)



Accurate (n=342)

Accurate – every time (57% Overall, 54.3% Low, 62% Middle & 55% High)

Accurate – almost always, but not every time (30% Overall, 20% Low, 32% Middle & 38% High)

Not accurate at all (13% Overall, 26% Low, 6% Middle & 8% High)

Source: Project Water 2006 n=397

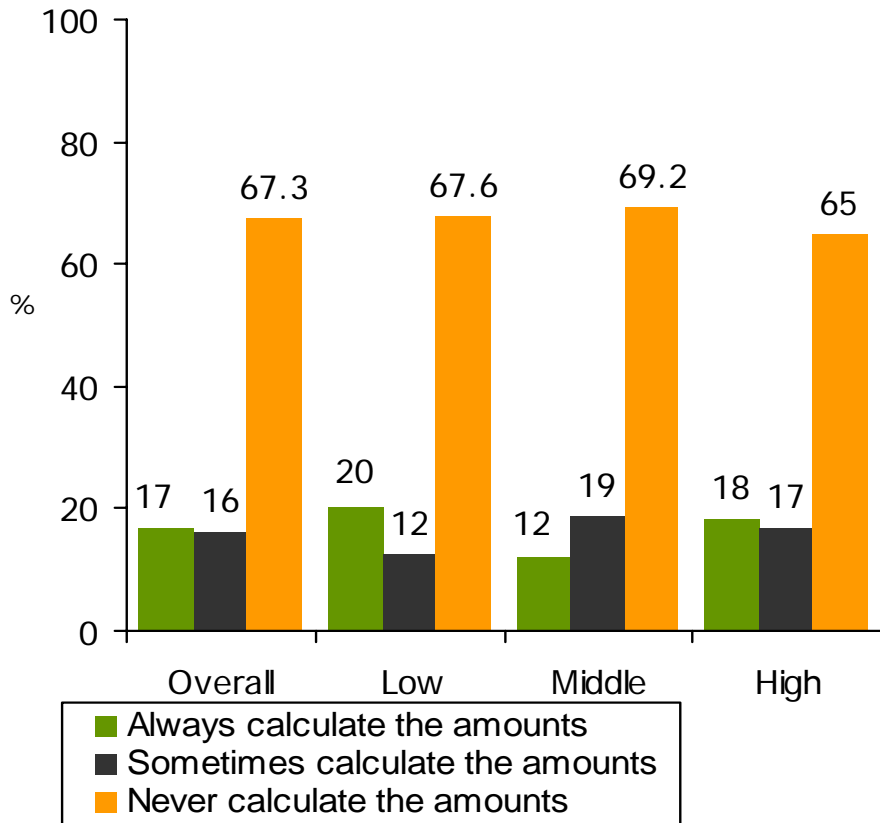
Do you regularly receive a water/sewer account / Do you feel the water / sewer account is ...?

Water or sewer account – amount calculated

Overall & household type



Accounts are mostly never checked



Reasons for calculating or not calculating the water / sewer account (n=338)

To see if the amount is correct, sometimes errors occur (19% Overall, 18% Low, 21% Middle, 19% High)

To control usage (37% Overall, 25% Low, 34% Middle & 52% High)

I assume / trust / believe it is correct (37% Overall, 25% Low, 25% Middle & 34% High)

Source: Project Water 2004 n=354, 2006 n=397

And in your opinion is the water/sewer account.../ Do you calculate to check or verify? / Why?



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1. Customer satisfaction

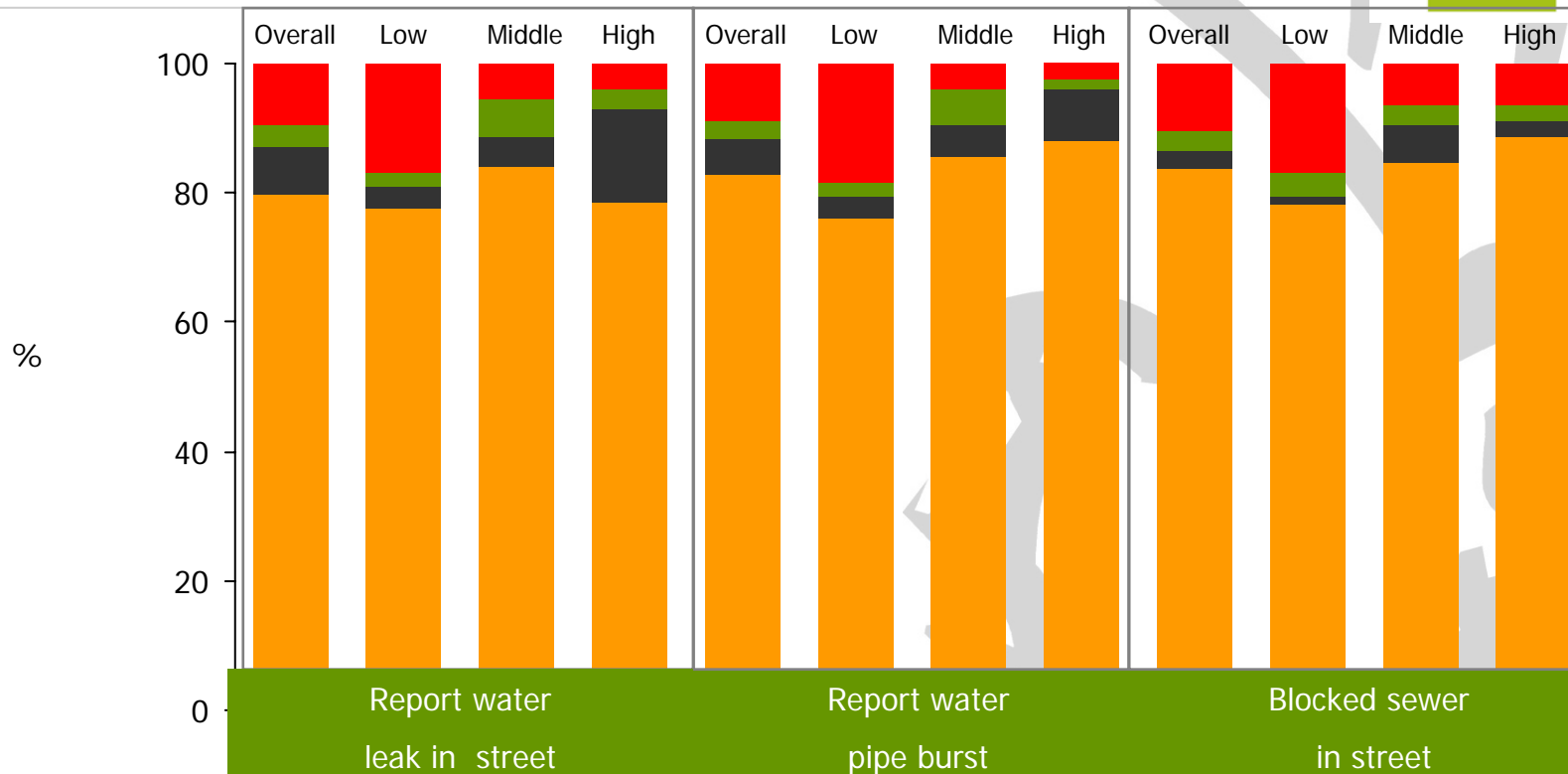
2. Behaviour relating to water usage

3. Evaluation of services received



History of dealing with municipality

Overall & household type



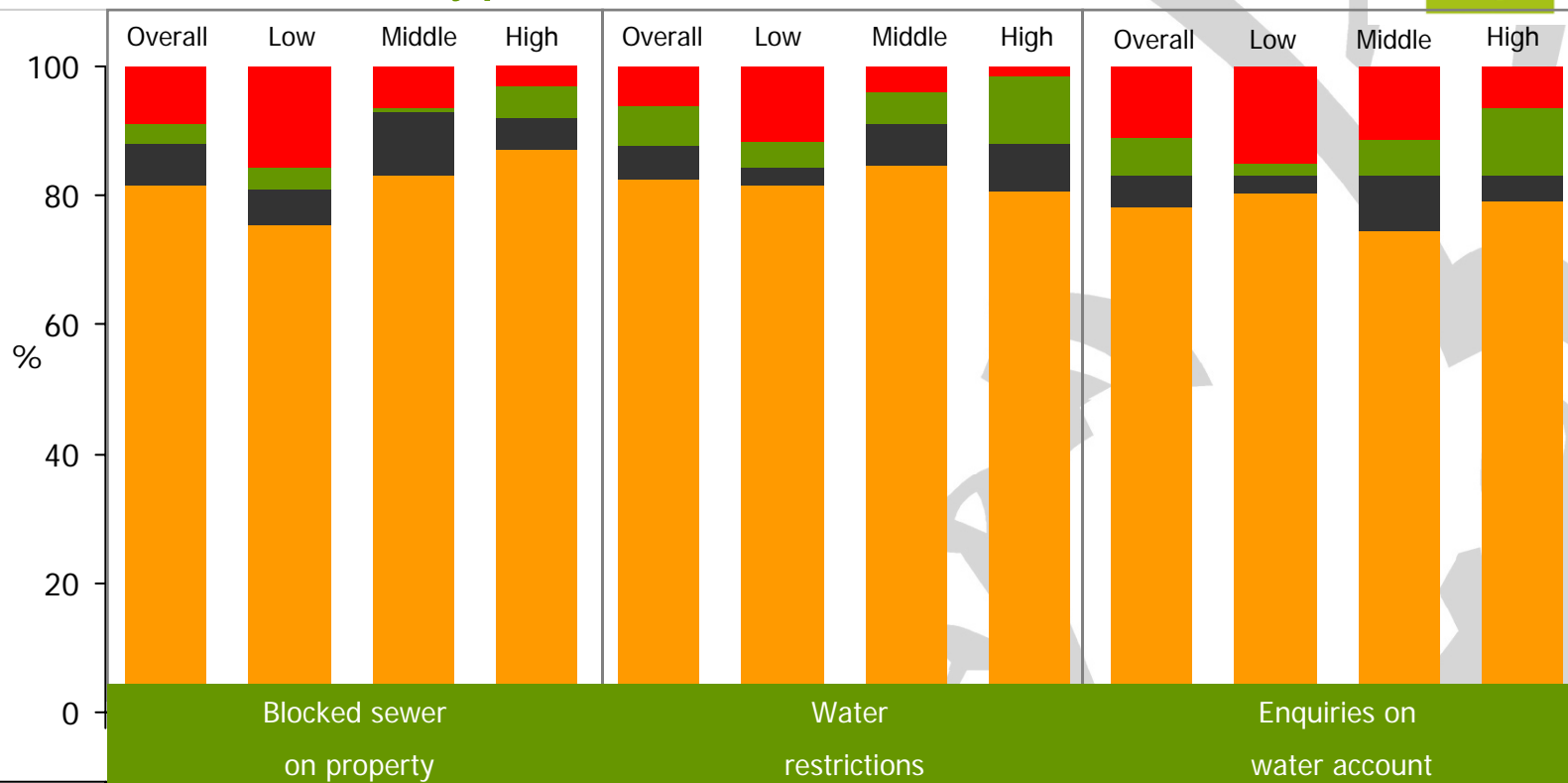
| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
|-----------------------------|---------|------|--------|------|---------|------|--------|------|---------|------|--------|------|
| Report water leak in street | 9.3 | 17 | 5.6 | 4 | 8.8 | 18.4 | 4 | 2.4 | 10.3 | 17 | 6.4 | 6.4 |
| Report water pipe burst | 3.5 | 2 | 5.6 | 3.2 | 3 | 2 | 5.6 | 1.6 | 3 | 3.4 | 3.2 | 2.4 |
| Blocked sewer in street | 7.3 | 3.4 | 4.8 | 14.4 | 5.3 | 3.4 | 4.8 | 8 | 3 | 1.4 | 5.6 | 2.4 |
| Never | 79.8 | 77.6 | 84 | 78.4 | 82.9 | 76.2 | 85.6 | 88 | 83.6 | 78.2 | 84.8 | 88.8 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

How long ago, if ever, have you dealt with anyone from the municipality regarding any of the following?

History of dealing with municipality

Overall & household type



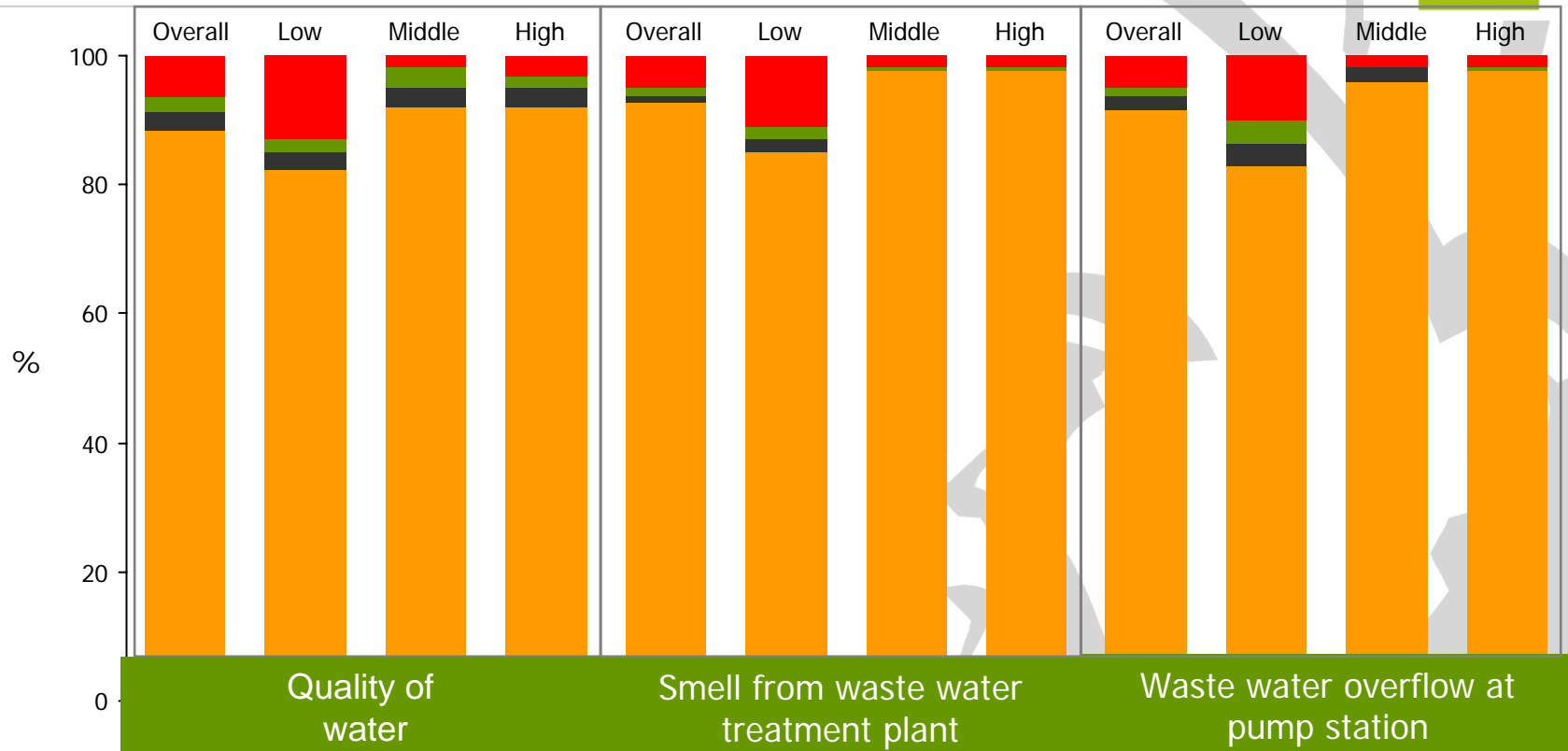
| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
|-----------------|---------|------|--------|------|---------|------|--------|------|---------|------|--------|------|
| ■ Past 6 months | 8.8 | 15.6 | 6.4 | 3.2 | 6.1 | 11.6 | 4 | 1.6 | 11.1 | 15 | 11.2 | 6.4 |
| ■ Past year | 3 | 3.4 | 0.8 | 4.8 | 6.3 | 4.1 | 4.8 | 10.4 | 5.8 | 2 | 5.6 | 10.4 |
| ■ Longer ago | 6.5 | 5.4 | 9.6 | 4.8 | 5.3 | 2.7 | 6.4 | 7.2 | 5 | 2.7 | 8.8 | 4 |
| ■ Never | 81.6 | 75.5 | 83.2 | 87.2 | 82.4 | 81.6 | 84.8 | 80.8 | 78.1 | 80.3 | 74.4 | 79.2 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

How long ago, if ever, have you dealt with anyone from the municipality regarding any of the following?

History of dealing with municipality

Overall & household type



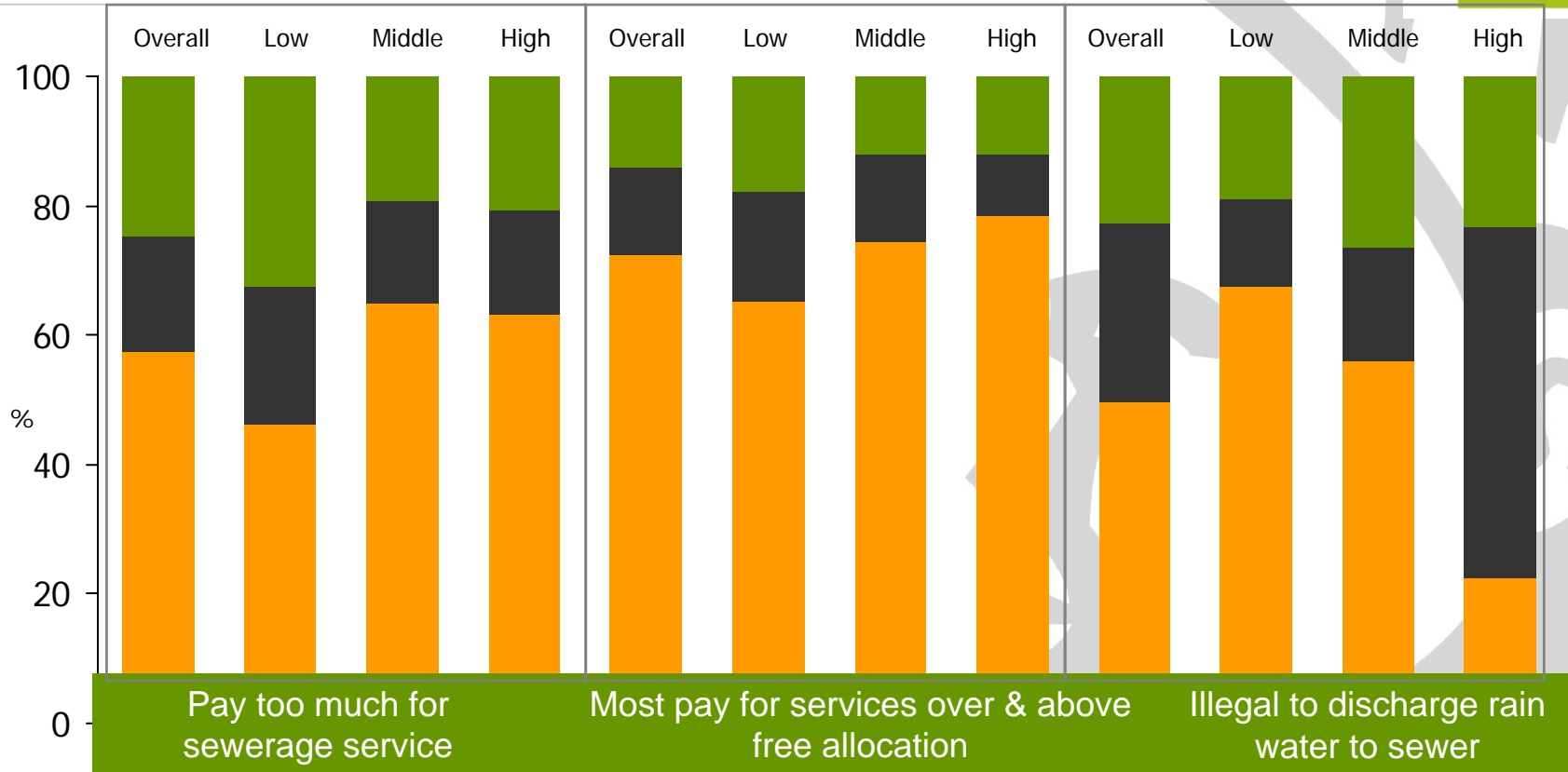
| | Overall | Low | Middle | High | Overall | Low | Middle | High | Overall | Low | Middle | High |
|-----------------|---------|------|--------|------|---------|------|--------|------|---------|------|--------|------|
| ■ Past 6 months | 6.3 | 12.9 | 1.6 | 3.2 | 5 | 10.9 | 1.6 | 1.6 | 4.8 | 10.2 | 1.6 | 1.6 |
| ■ Past year | 2.3 | 2 | 3.2 | 1.6 | 1.3 | 2 | 0.8 | 0.8 | 1.5 | 3.4 | * | 0.8 |
| ■ Longer ago | 3 | 2.7 | 3.2 | 3.2 | 0.8 | 2 | * | * | 2 | 3.4 | 2.4 | * |
| ■ Never | 88.4 | 82.3 | 92 | 92 | 92.9 | 85 | 97.6 | 97.6 | 91.7 | 83 | 96 | 97.6 |

Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

How long ago, if ever, have you dealt with anyone from the municipality regarding any of the following?

Evaluation of service

Overall & household type



Source: Project Water '03, '04, '06 n=520, 400, 397

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

Importance Ratings and Satisfaction



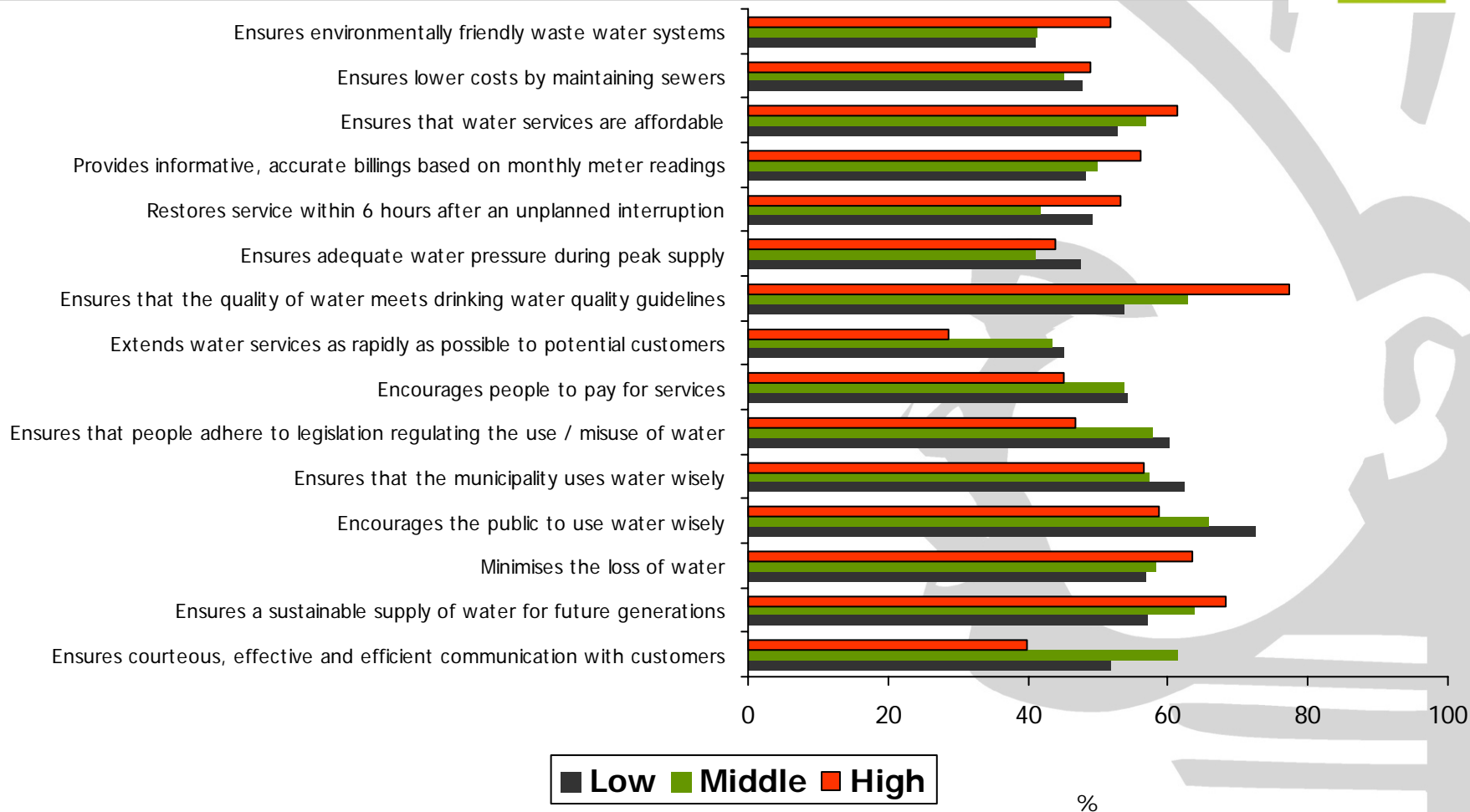
Respondents were asked to choose from fifteen of the services, the one service that they regard as most important to them personally and give this a 1

It is important to note that the ratings refer to
relative importance

A lower score indicates that the service is
less important relative to others and not
necessarily that it is *unimportant*

Relative Importance

Low, Middle & High



Source: Project Water 2006 n=397

Choose the one you regard as most important – and least important?

Q5a

New questions



Meaning of regulation

Low, Middle & High



Low household type n = 147

| | |
|---|-------|
| Don't know / Nothing | 71% |
| We must use water carefully | 10.3% |
| Rules governing the usage of services | 15% |
| Monitoring and control of water consumption | 2% |
| Restriction of the usage of services | 1% |
| How the council charge for water usage | 1% |

Middle household type n = 125

| | |
|---|-----|
| Don't know / Nothing | 61% |
| We must use water carefully | 8% |
| Rules governing the usage of services | 20% |
| Monitoring and control of water consumption | 6% |
| Restriction of the usage of services | 3% |
| How the council charge for water usage | 2% |

High household type n = 125

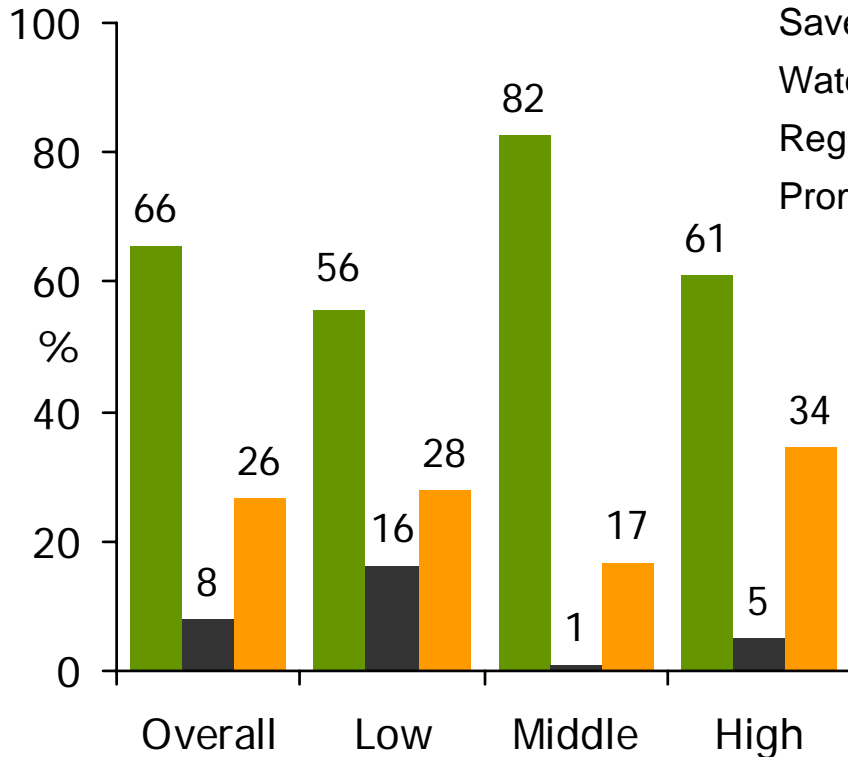
| | |
|---|-----|
| Don't know / Nothing | 79% |
| We must use water carefully | 1% |
| Rules governing the usage of services | 13% |
| Monitoring and control of water consumption | 3% |
| Restriction of the usage of services | 2% |
| How the council charge for water usage | 2% |

Is regulation important and why?

Overall & household type



Is regulation of water services is important?



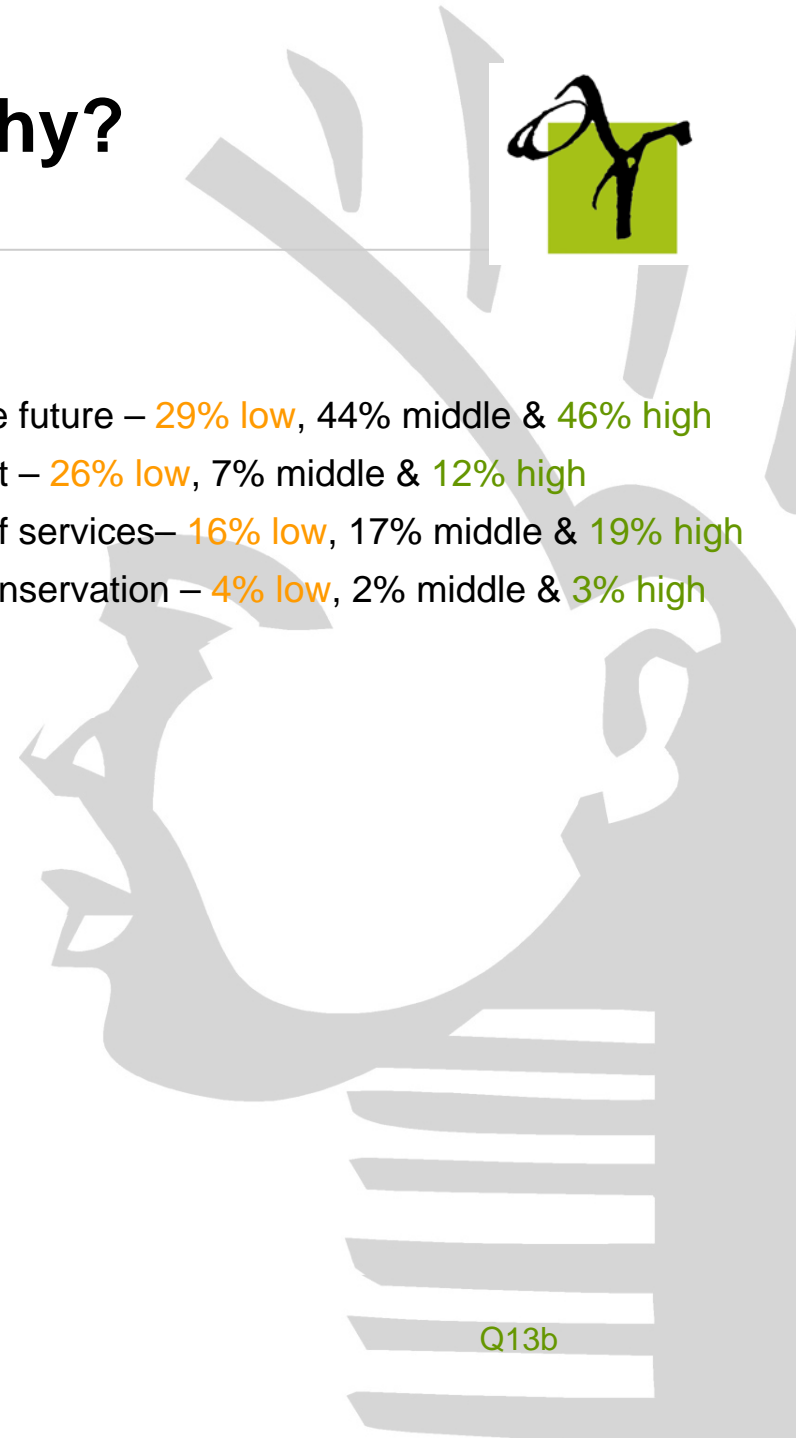
If Yes, why?

Save water for the future – 29% low, 44% middle & 46% high

Water is important – 26% low, 7% middle & 12% high

Regulate usage of services – 16% low, 17% middle & 19% high

Promote water conservation – 4% low, 2% middle & 3% high



Q13b

Participate in the monitoring / regulation of services

Overall & household type

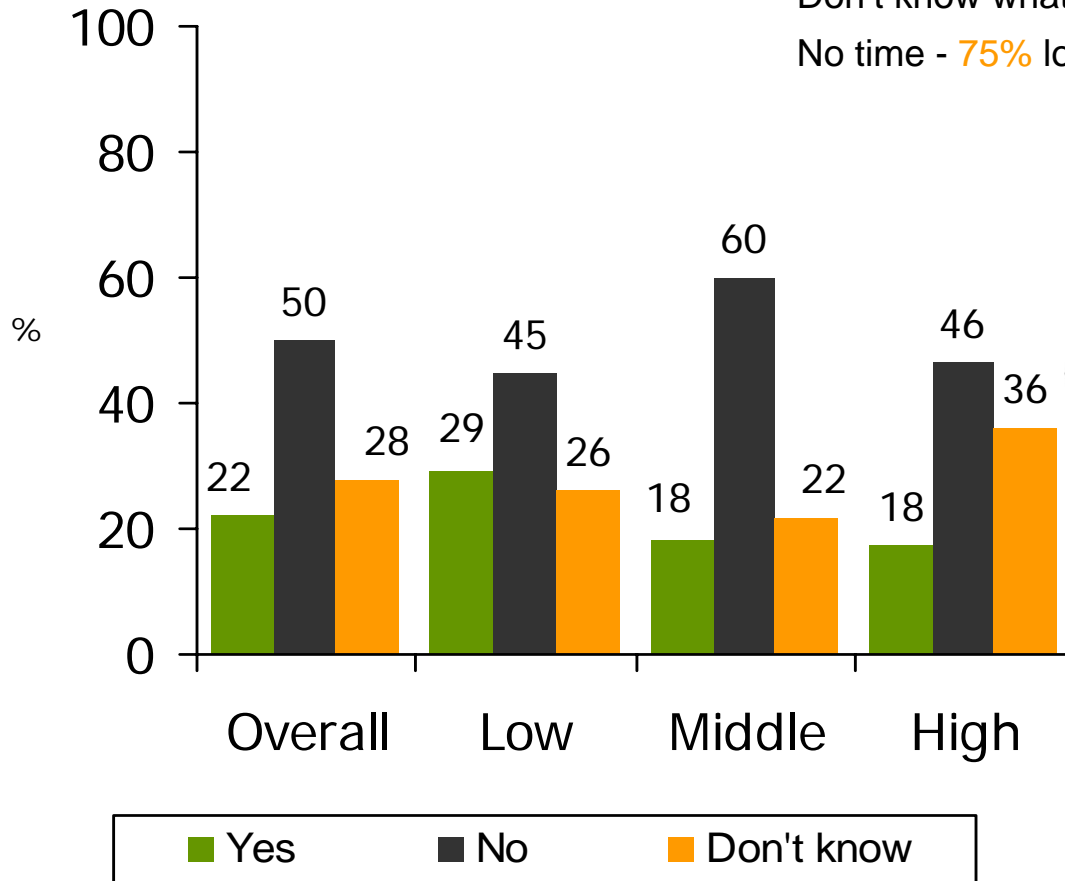


Would you participate?

If No, why?

Don't know what it is - 25% low, 0% middle & 33% high

No time - 75% low, 0% middle & 50% high



Willingness to be involved in monitoring of services

Overall & household type



Would you be interested?

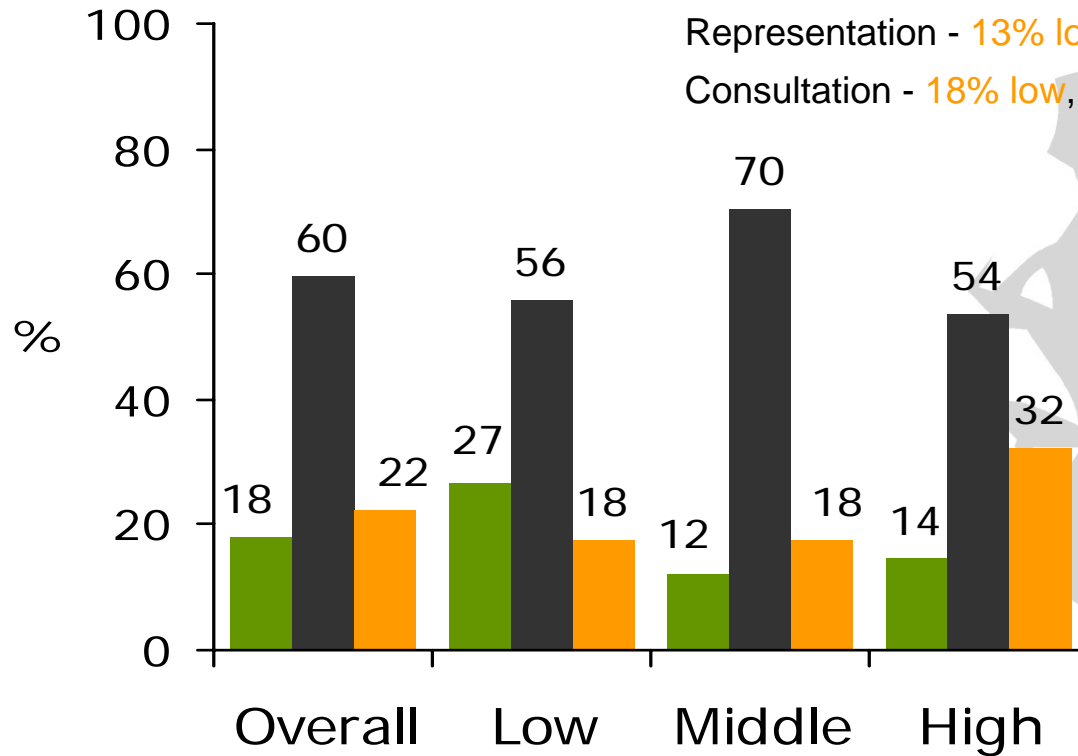
If Yes, how (n=72)?

By receiving information - 54% low, 80% middle & 89% high

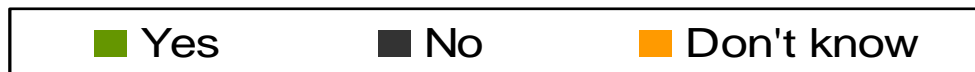
Involvement in decision-making - 41% low, 13% middle & 39% high

Representation - 13% low, 13% middle & 39% high

Consultation - 18% low, 13% middle & 39% high



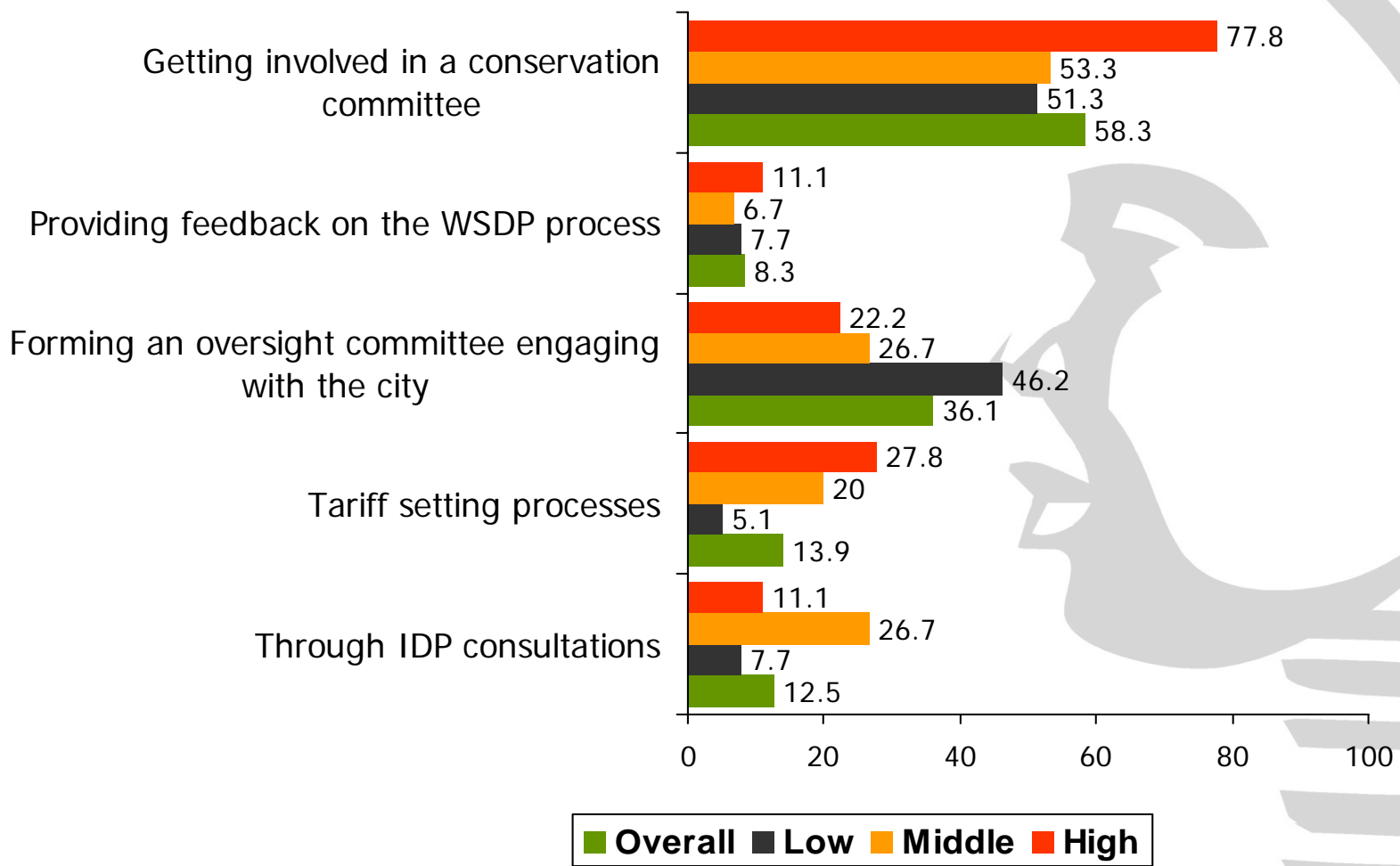
Almost all respondents are currently not engaged with council regarding monitoring of services



16g

Areas interested to participate

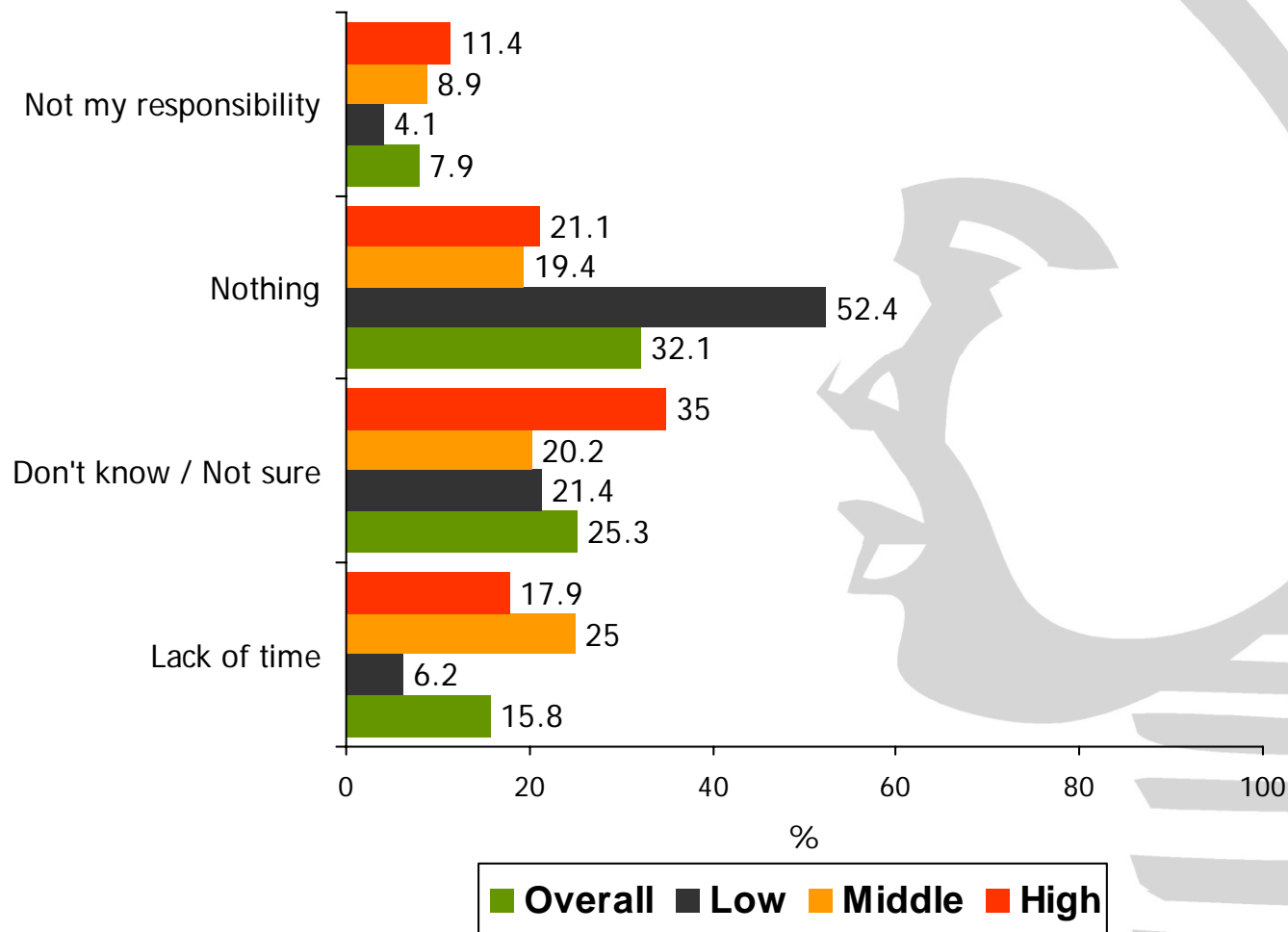
Overall & household type - Aided



■ Overall ■ Low ■ Middle ■ High

Current constraints for involvement in regulation

Overall & household type - Spontaneous



Q16j

Conclusions



- Middle and high household type residents are generally satisfied with the overall performance of the municipality in providing services (80%+)
- However, a notable percentage of low household type residents are not satisfied
- Satisfaction level with regard to providing drinking water on tap is high among all residents across the three household types
- There is a high level of dissatisfaction with the maintenance of the sewer drainage systems among the low household type residents unlike among the middle and high household type residents
- Low household type residents are mostly satisfied with the quality of water to drink, taste, smell, colour, texture and water pressure when the tap is turned on. Slightly high dissatisfaction levels with these aspects can be noticed among middle and high household type residents

Conclusions



- Low household type residents experience problems with water leakages more frequently than the other household type residents
- Low household type residents mostly contact the municipality when experiencing problems such as blocked or broken sewers or water leaks, while residents from middle and high household types sometimes contact plumbers when some of these problems occur
- The majority of low household type residents agree with most of the statement made about the situation in Cape Town, unlike their the middle and low household type residents counterpart
- Most residents in low household type have not changed their behaviour to conserve water
- The main reason for changing the behaviour among those few who did in the low household type was because they had to adhere to water restriction

Conclusions



- Among all household type residents, the way in which the behaviour was changed was mainly through re-using water from bath or shower
- All residents mostly use municipal water – outside tap to water the garden
- Most low household type residents have never heard about water efficient fittings
- The majority of residents from low household type group have heard of the Water Week Initiative but did not participate in it
- Usage of bottled water is lower among low household type residents as compared to the middle and high household type residents

Conclusions



- A notable percentage of low household type residents indicated that they don't receive water or sewer accounts, that the account statement is almost impossible to understand and that it is not accurate at all
- Residents from all household types do not calculate the amounts when they receive the account
- There are low levels of dealing with the municipality across all household type residents
- The most important aspect among the low household type residents is to encourage the public to use water wisely.
- Ensuring that the municipality uses water wisely and that people adhere to legislation are also important issues among low household type residents

Conclusions



- Most of the residents in all household types indicated that they don't know what regulations mean
- The majority of low household type residents indicated that regulation is not important
- Propensity to participate in the monitoring of services and willingness to be involved is higher in low household type residents than in middle and high household types
- Generally there is no current constraint for involvement in regulation, particularly among the low household residents

Recommendations



- *Maintain the high satisfaction levels with the municipality's overall performance amongst the middle and high household type residents while improving it among the low household type residents*
- *Improve the level of contact between residents in all household type categories with the municipality*
- *Educate and encourage people to change their behaviour to conserve water, particularly among the low household type residents*
- *Ensure that all residents receive their water or sewer account*
- *Encourage low household type residents to be involved in regulation as they are more willing to and mostly do not have any current constraints for involvement*



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Thank You

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