

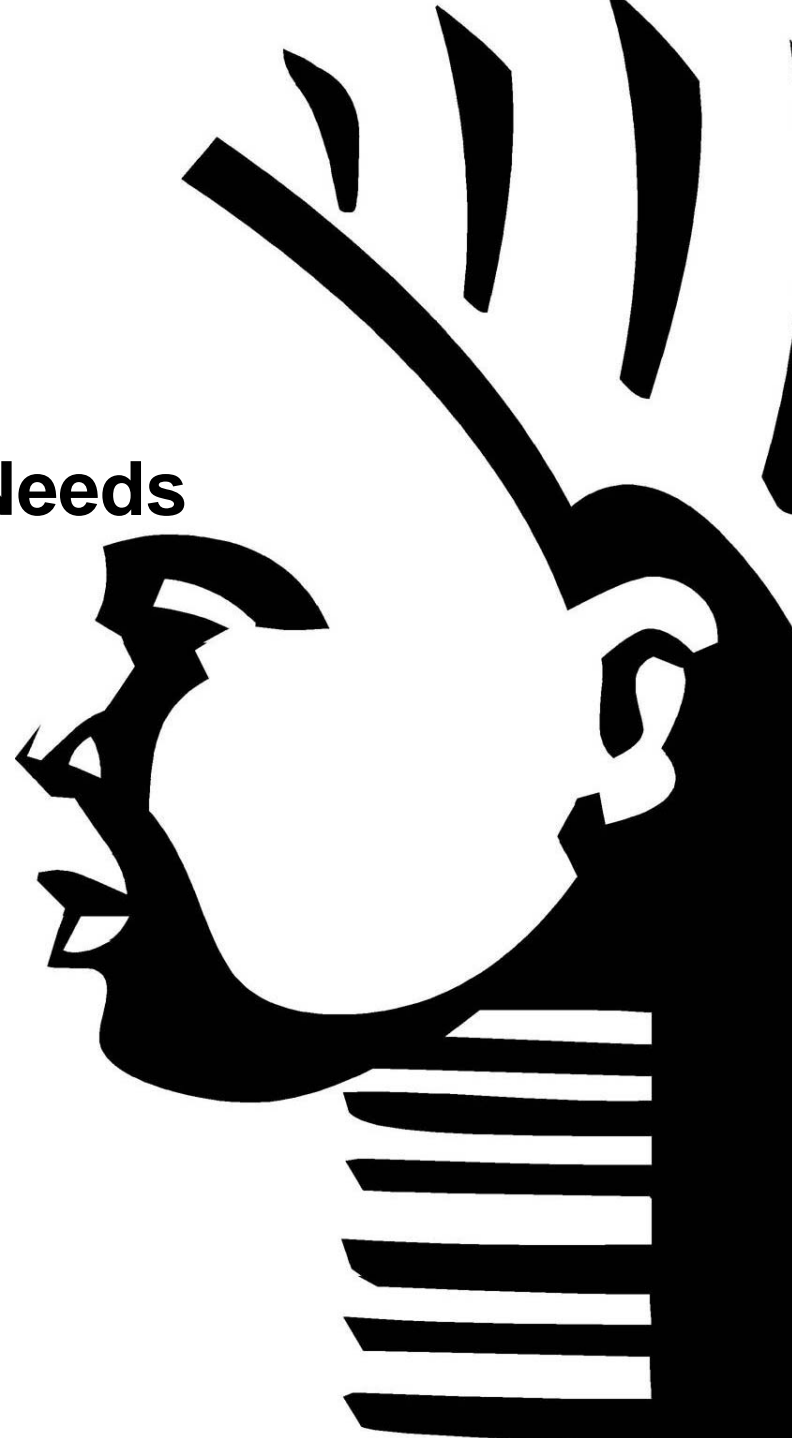


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# Customer Perceptions and Needs

Prepared for City of Cape Town  
Prepared by Lucas Raganya

Date: May 2006



# Structure of Presentation

- Introduction
- Background
- Methodology
- Key Findings
  - **Residents**
  - **Informal settlements**
  - **Business**
  - **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 all household types, supplied
- A sample of 102 residents, drawn from 6 informal areas (Witsand, Kosovo, Mfuleni Informal Settlements, Monwabisi Park, Barney Molokwana, Imizamo Yethu) identified and 16 or 17 interviews completed in each informal area

## ■ Businesses:

- Sample of 42, 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)



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**Residents**

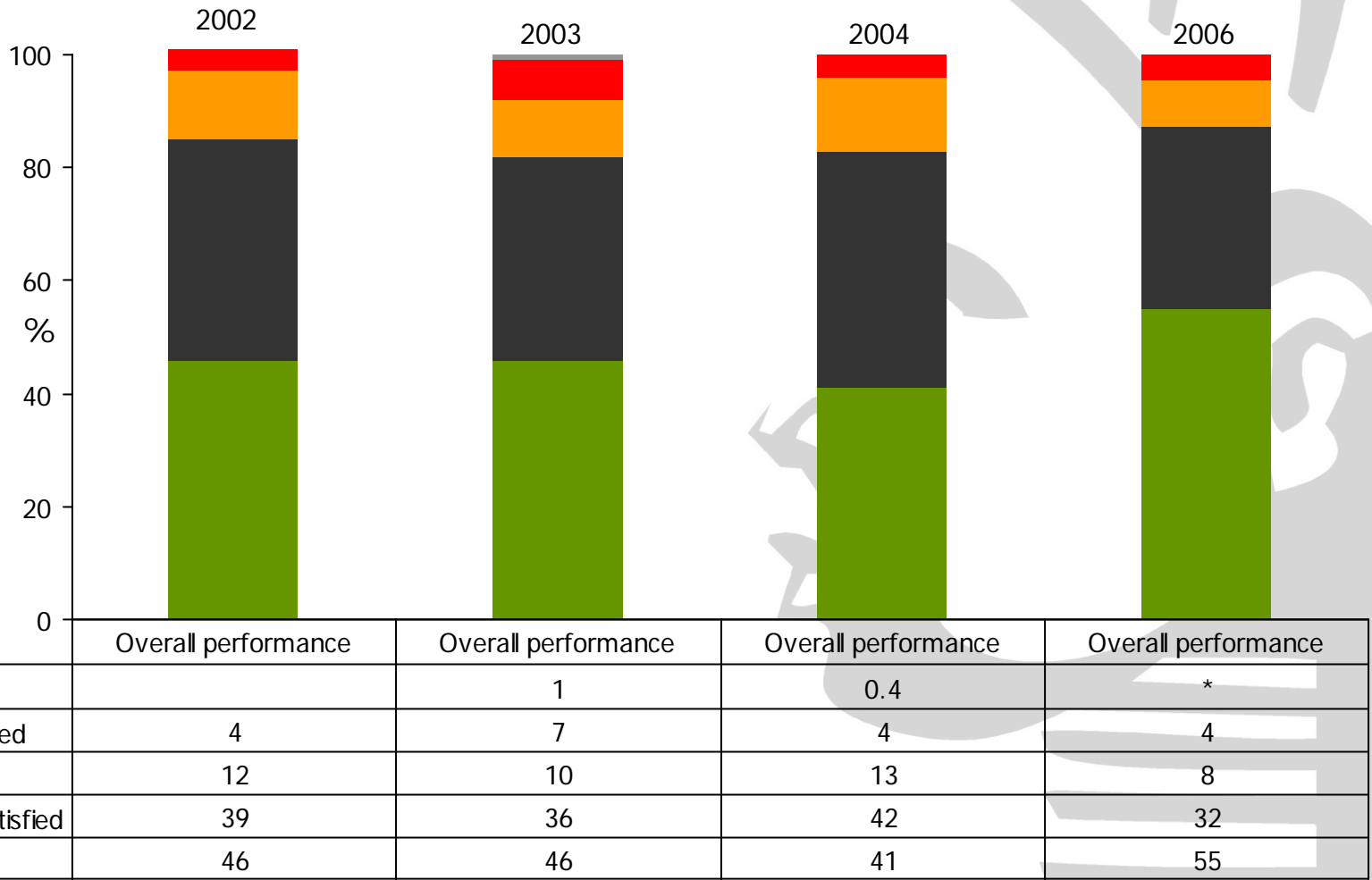


# Satisfaction levels - overall performance

## Overall



High satisfaction levels of 80%+, a significant increase of 'very' satisfied

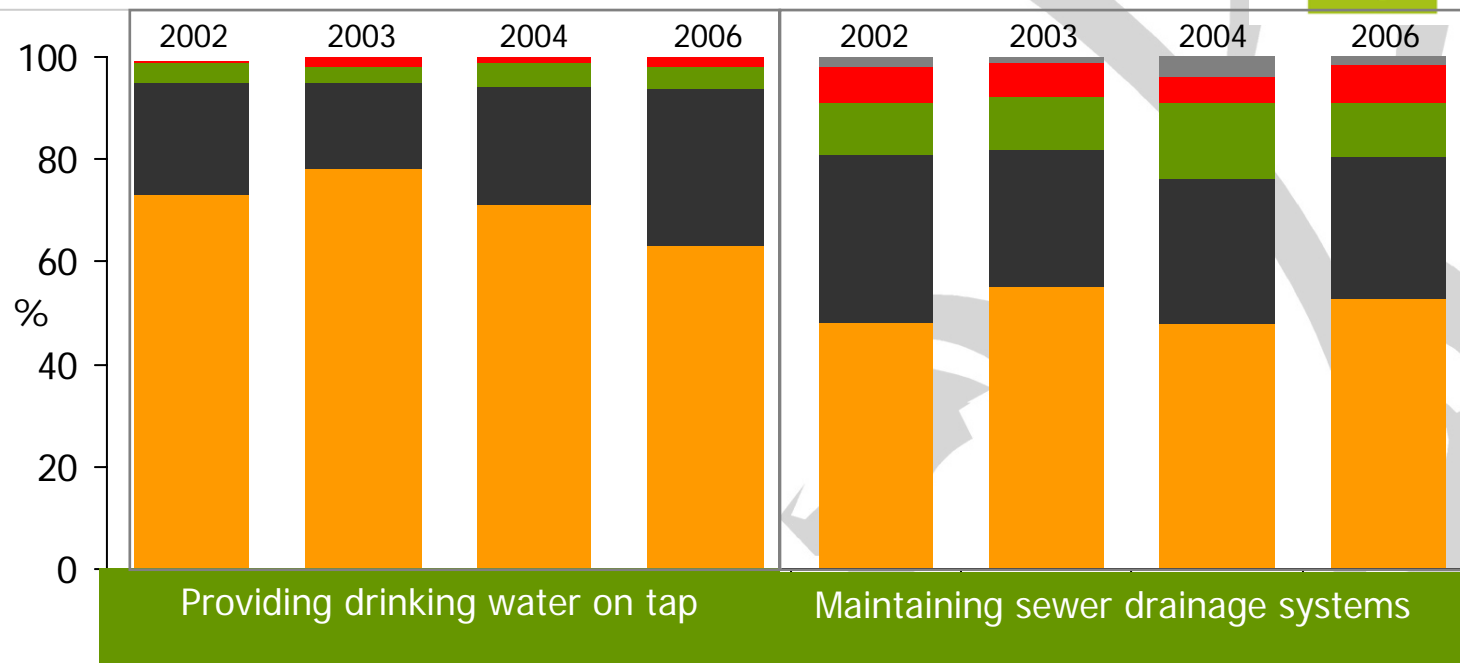


Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

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

# Satisfaction – water and sewer drainage systems

## Overall



	2002	2003	2004	2006	2002	2003	2004	2006
Not sure		0.2	0.2	*	2	1	4	1.8
Very dissatisfied	0.4	2	1	1.8	7	7	5	7.3
Dissatisfied	4	3	5	4.5	10	10	15	10.6
Somewhat satisfied	22	17	23	30.5	33	27	28	27.5
Very satisfied	73	78	71	63.2	48	55	48	52.9

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

*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

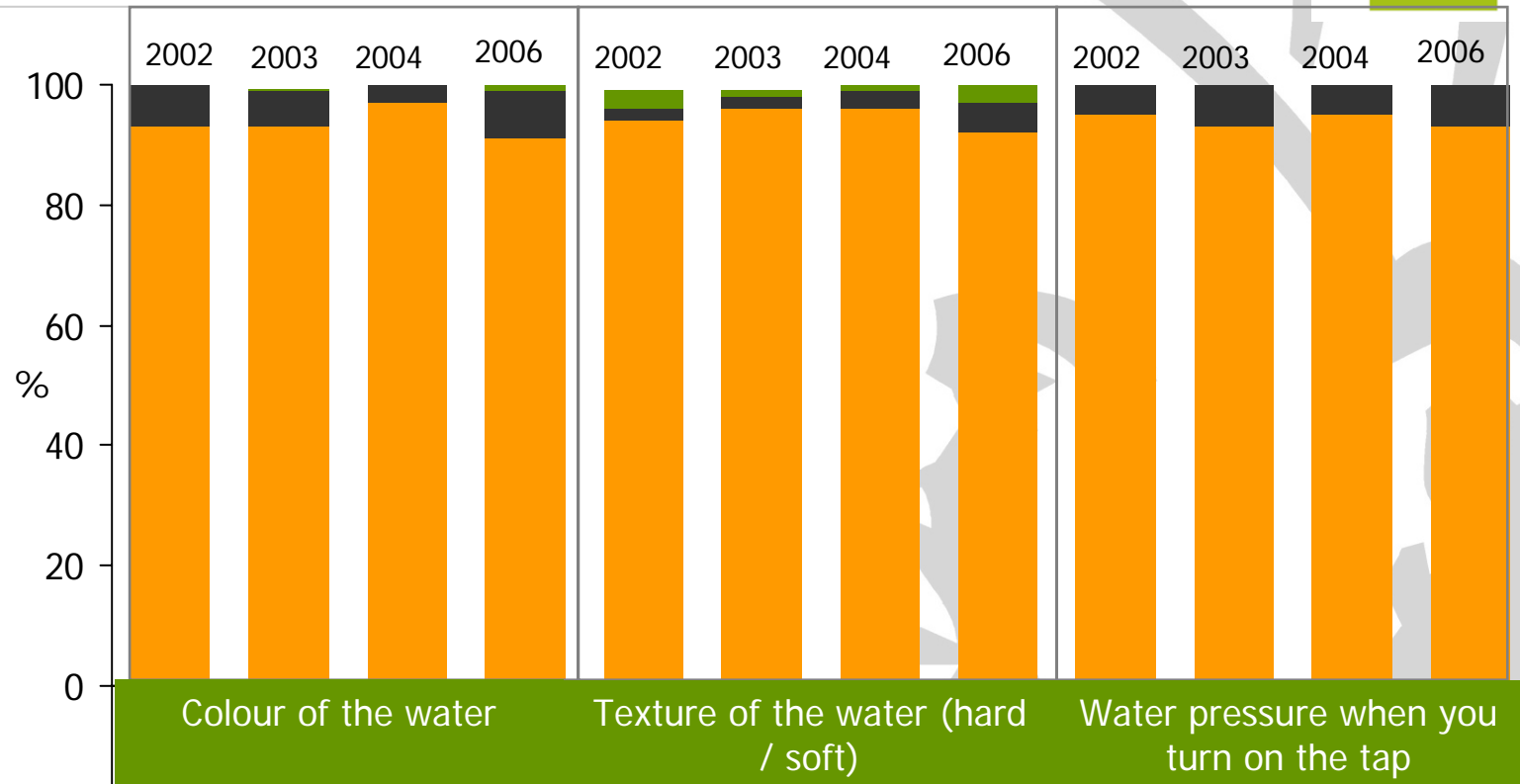


Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

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

# Satisfaction levels – water

## Overall

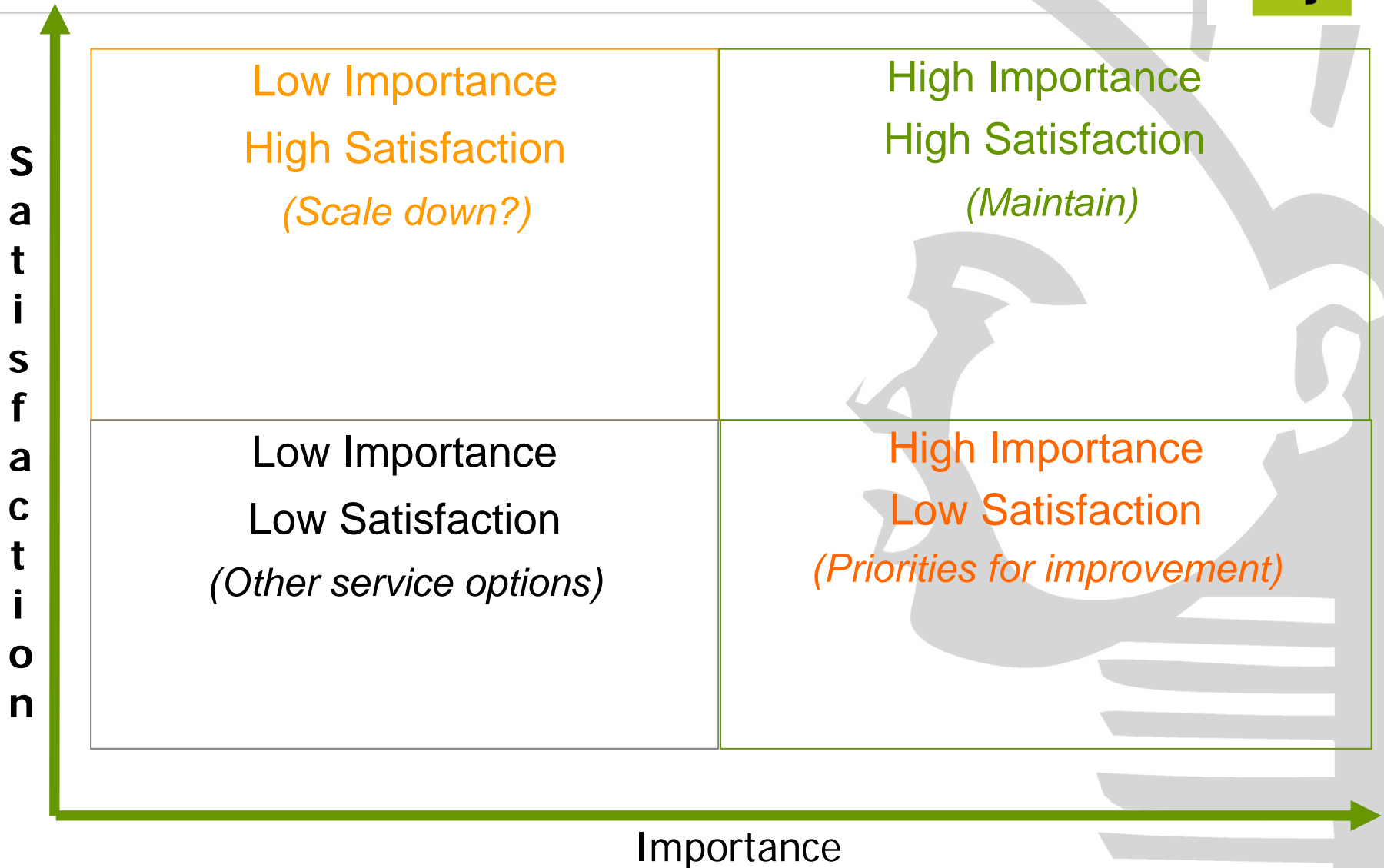


■ Not sure	0.3	0.4		1	3	1	1	3	0.2	0.2		
■ Dissatisfied	7	6	3	8	2	2	3	5	5	7	5	7
■ Satisfied	93	93	97	91	94	96	96	92	95	93	95	93

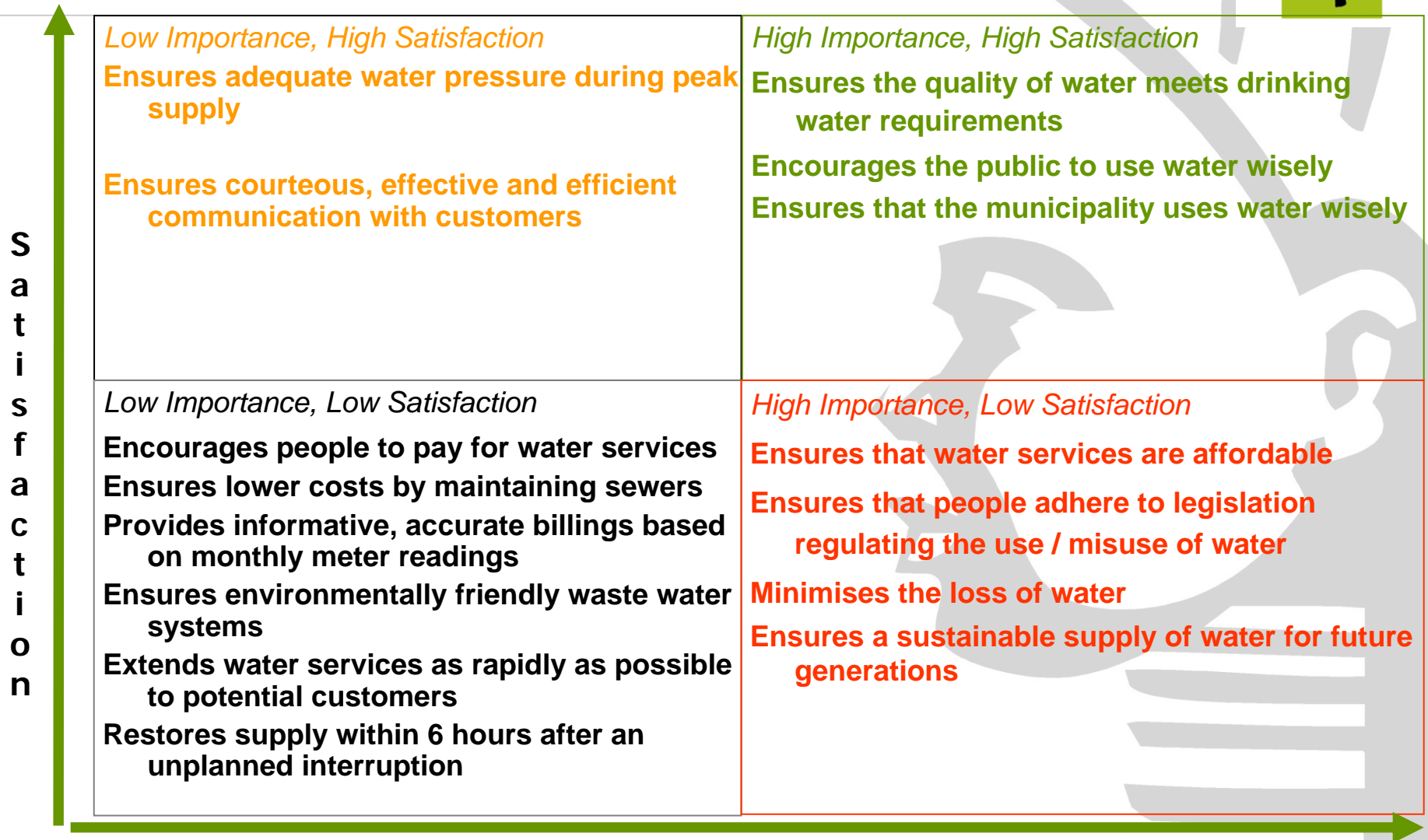
Source: Project Water '02, '03, '04, '06 n=497, 520, 400, 397

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

# GAP Analysis



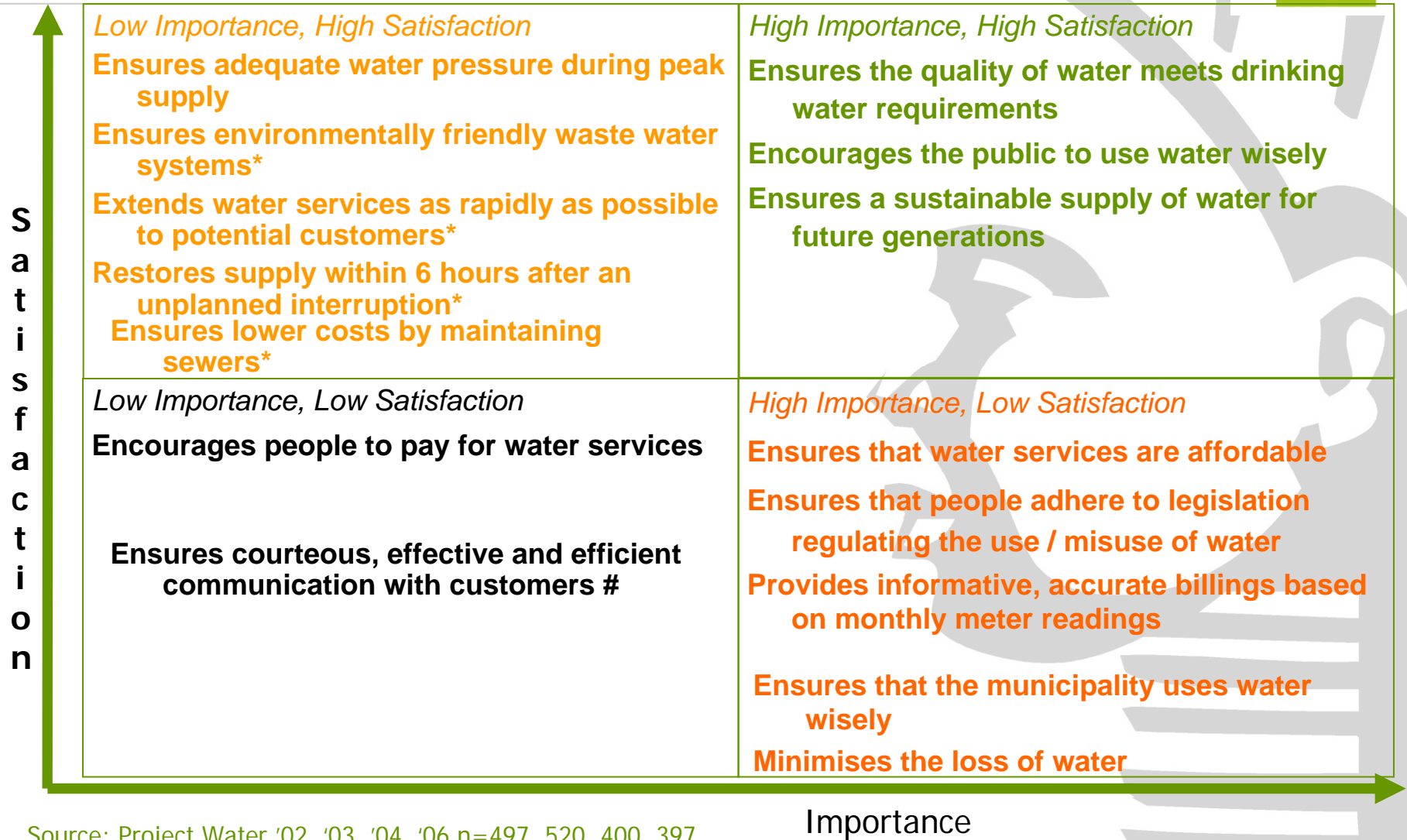
# GAP Analysis - 2006



**Importance**

Source: Project Water 2006 n=397

# GAP Analysis : 2003 - 2004



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



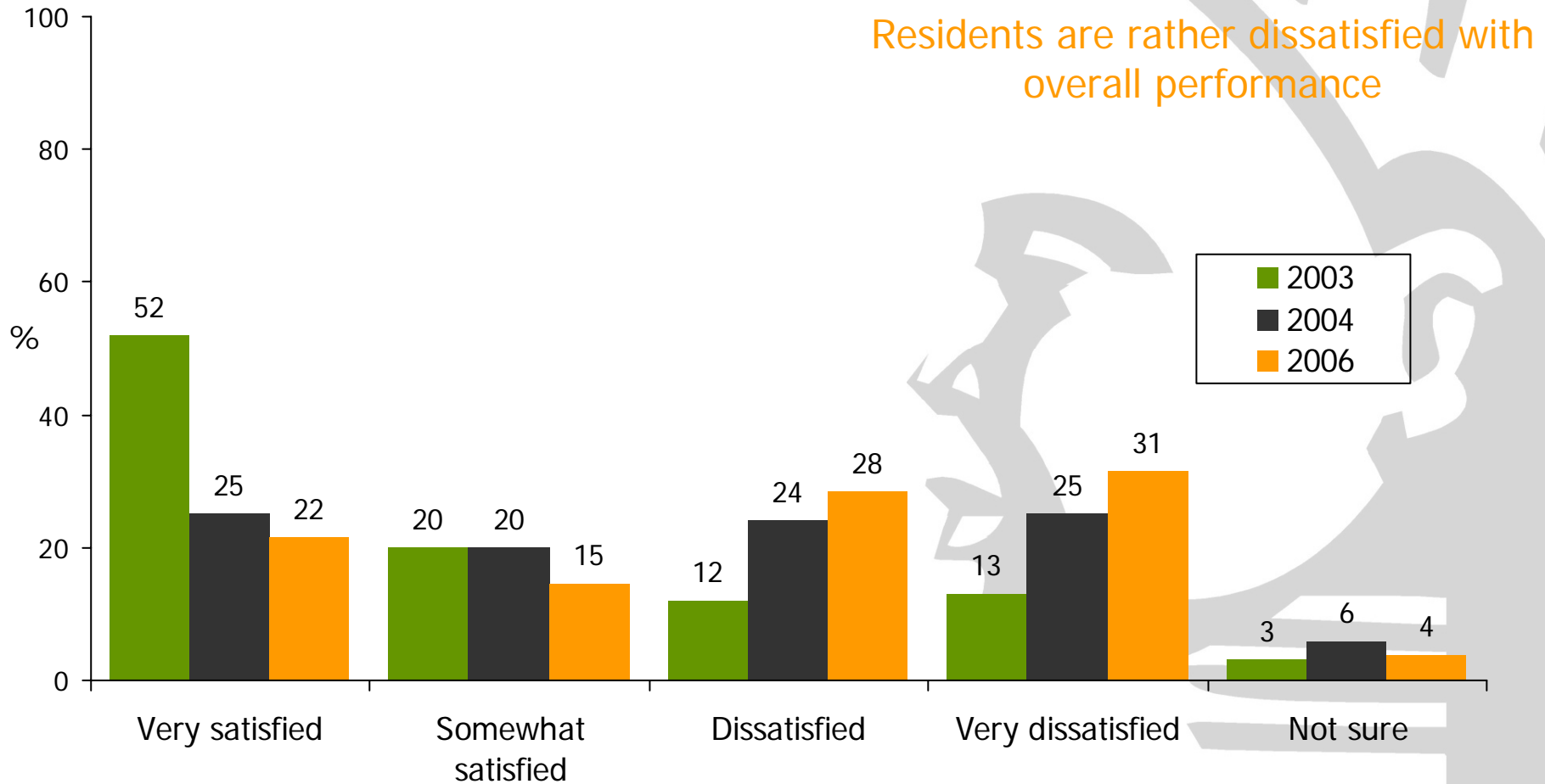
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# Informal Settlements



# Satisfaction levels - overall performance

## Overall

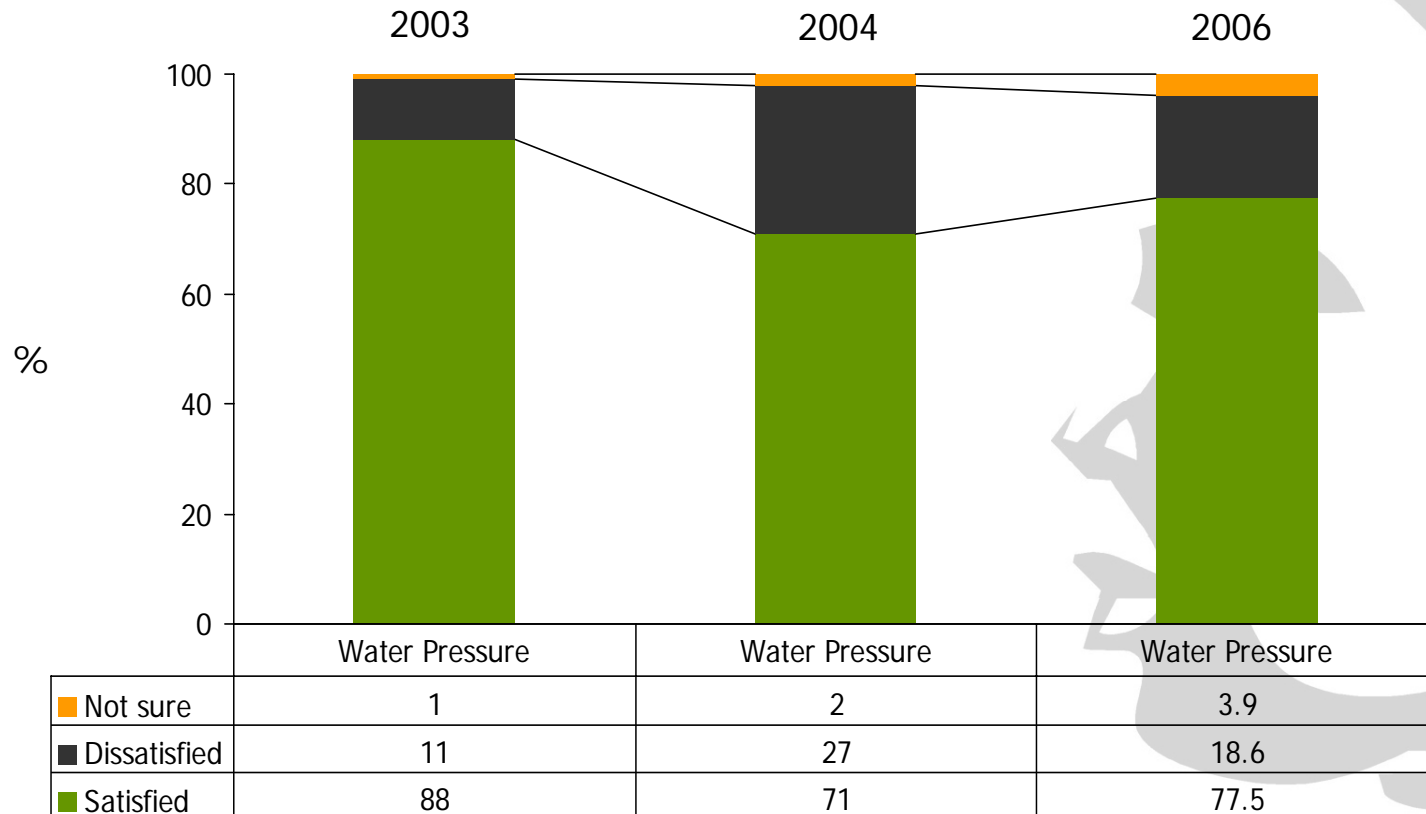


Source: Project Water '03, '04, '06 n=100, n=100, n=102

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

# Satisfaction levels – water pressure

## Overall



Source: Project Water '03, '04, '05 n=100, n=100, n=102

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



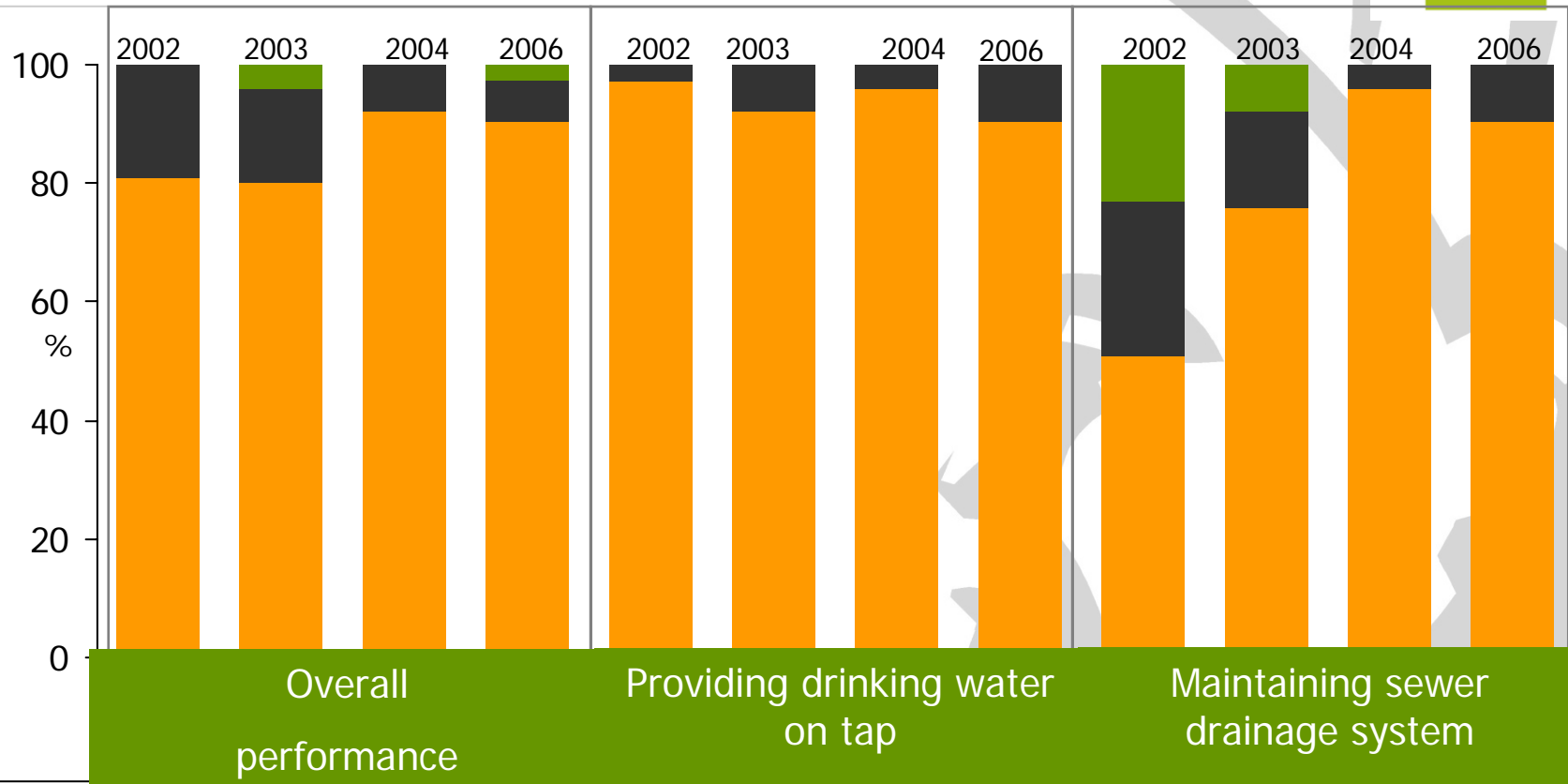
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**Business**



# Levels of satisfaction

## Overall



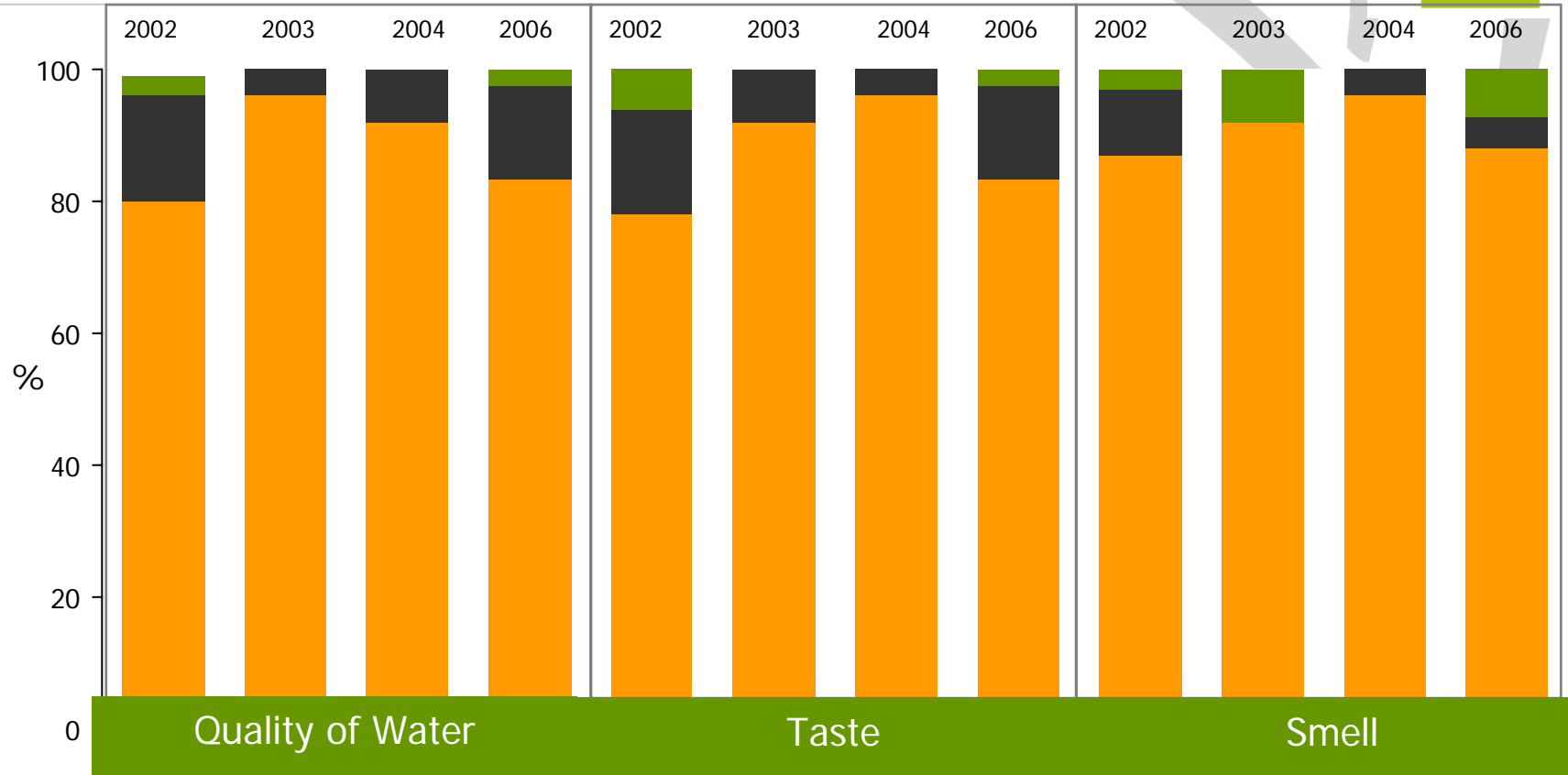
	2002	2003	2004	2006
■ Not sure		4.0		2.4
■ Dissatisfied	19.0	16.0	8.0	7.1
■ Satisfied	81.0	80.0	92.0	90.5

Source: Project Water '02, '03, '04, '06 n=31, 25, 25, 42

*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?*

# Satisfaction levels - water

## Overall

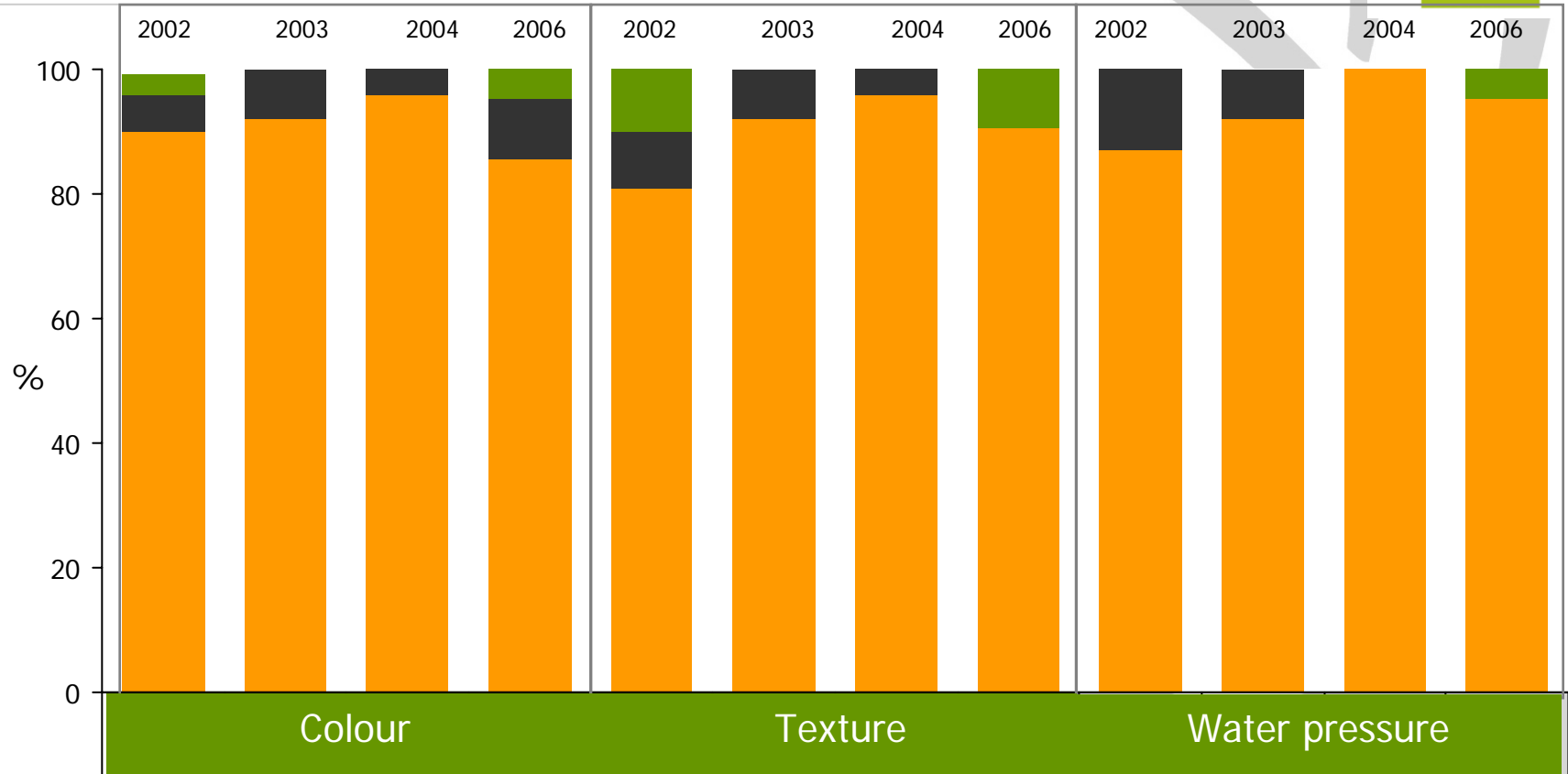


Source: Project Water '02, '03, '04, '06 n=31, 25, 25, 42

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

# Satisfaction levels - water

## Overall



D/k	3			4.8	10			9.5				4.8
Dissat.	6	8	4	9.5	9	8	4	*	13	8		*
Satisf.	90	92	96	85.7	81	92	96	90.5	87	92	100	95.2

Source: Project Water '02, '03, '04, '06 n=31, 25, 25, 42

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

# Areas that the City of Cape Town should give special attention to



2004 - 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, e.g., watering public gardens whilst raining

2006

Better / quick service regarding maintenance and repairs

Business should be more strictly controlled when using water

Colour of water should be improved

# Conclusions



- Residents are still satisfied with the performance of the municipality in providing services (80%+)
- Low levels of dissatisfaction with the issues relating to water – only a few complaints about the taste of water

# Conclusions



- Residents in informal settlements are rather dissatisfied with services received and have complaints about water pressure
- Most respondents in informal settlements use water from a communal tap

# Conclusions



- Businesses are happy with the service received
- A number of businesses have taken steps to conserve water, amongst others, regulating water usage for irrigation and not letting taps run or leak unnecessarily
- Most business are very likely to use treated waste water for non-drinking purposes if available at a reduced rate
- None of the businesses know the percentage of water that they recycle

## Areas to concentrate on...



- *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
- Ensure a sustainable supply of water for future generations
- Ensure that people adhere to legislation regulating the use / misuse of water – increased awareness of water restrictions that are in place
- Minimise the loss of water – most of the respondents, particularly in informal settlements, indicated that water is important in their lives

# Recommendations



- Public awareness and education need to be stepped up to promote behavior change with regard to water conservation
- Increase public awareness regarding water restrictions guidelines
- Address the lack of awareness in informal communities regarding service tariff in future awareness campaigns
- The relatively low percentage of business respondents who agreed that they pay too much for water and sewer should be considered as significant input to future tariff calculation exercises.



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**Thank You**

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