CONSUMER COUNCIL FOR Water CYNGOR DEFNYDDWYR Dŵr

Water Matters

Household customers' views on their water and sewerage services 2015

djs research

On behalf of CCWater

28 June 2016

Contents

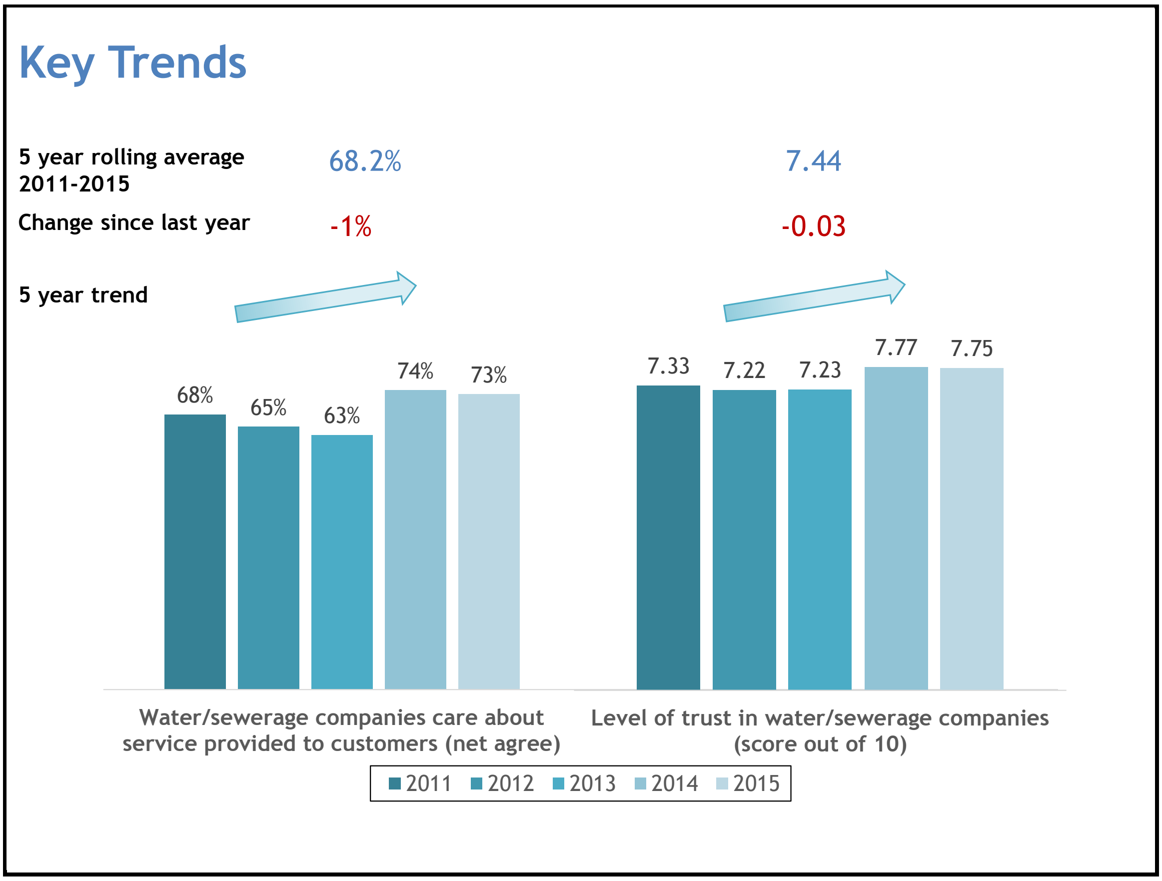
Charts and tables

Executive Summary

- This survey has been commissioned annually by the Consumer Council for Water (CCWater) since 2006 to identify household customers' views on their water and sewerage services in England and Wales, and track changes in these views over time.
- A total of 5,964 telephone interviews were conducted with household water and sewerage bill payers across England and Wales between the 24th September 2015 and the 12th January 2016. At least 200 interviews were carried out with customers of each Water and Sewerage Company (WaSC) and 150 with customers of each Water only Company (WoC).
- For inclusivity, 424 interviews were conducted with households which do not have a landline or only have a landline for broadband (mobile only households); the remaining 5,540 were conducted with households using a landline.
- Analysis has been undertaken at a total sample level (England and Wales combined), by country (England vs. Wales) and by water company. This is a move away from previous reporting where the analysis was at WaSC regional level rather than company level. More information on this can be found in paragraph 1.6.4.
- Another change introduced this year is a stronger focus on five-year trend analysis. This irons out short term fluctuations in the results, providing a more consistent picture of any changes over time. More information on this can be found in Section 1.6 of the main report.

Key findings

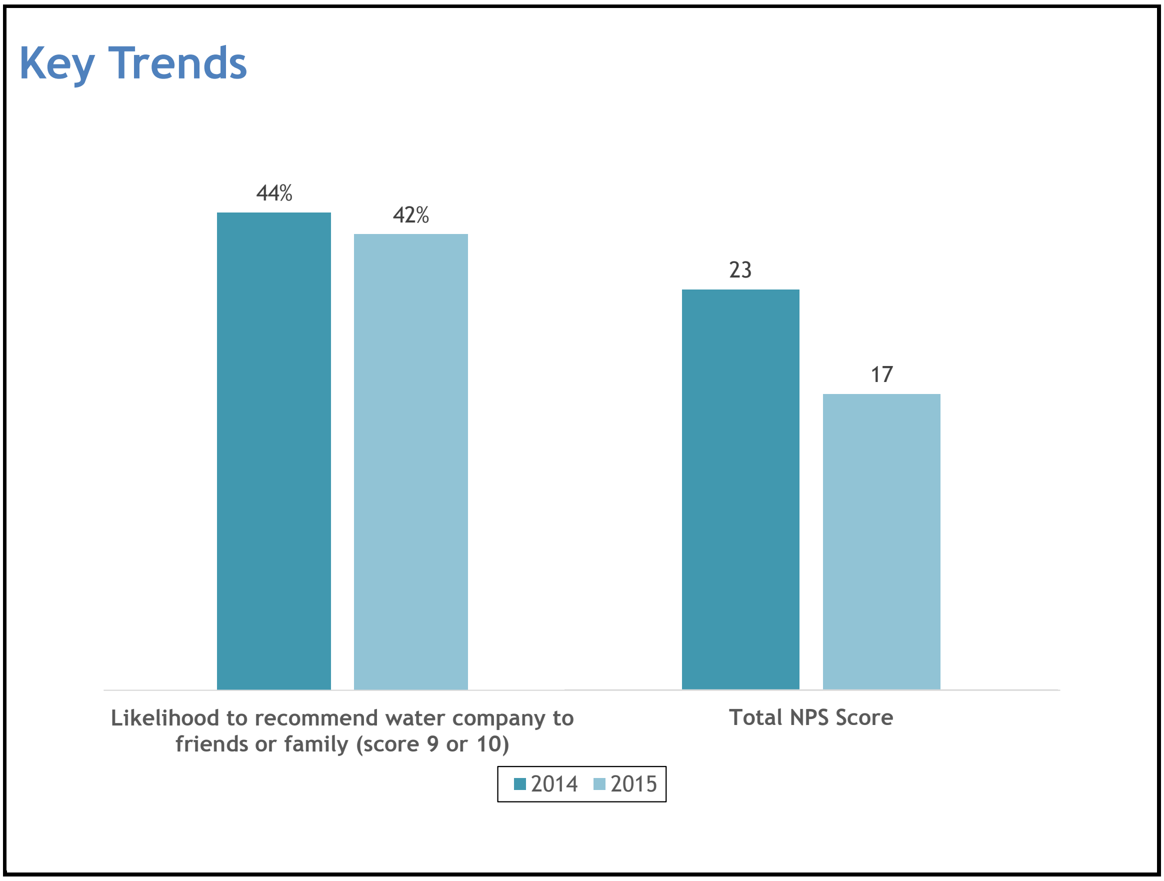
Figure 1: Care and Trust Measures - Key Trends



Water and sewerage companies are increasingly viewed as caring and trustworthy

- Since 2011 there has been a gradual increase in the proportion of customers who agree that water companies care about the service they provide (from 68% to 73% over five years). This trend applies to England and Wales, with significantly more customers in Wales considering that their water company cares, than in England (78% vs. 72% in 2015).
- Water companies continue to be seen as caring more about the service they provide than energy companies (73% vs. 68%).
- Trust scores for water companies have also increased, from 7.33 out of 10 in 2011 to 7.75 in 2015. Upward trends have been witnessed in both England and Wales, with the trend more marked in Wales, where trust is now significantly higher than England in 2015 (8.07 vs. 7.73).
- Water companies remain significantly ahead of energy companies when it comes to trust (7.75 vs. 7.36).

Figure 2: Recommending Water Companies – Key Trends



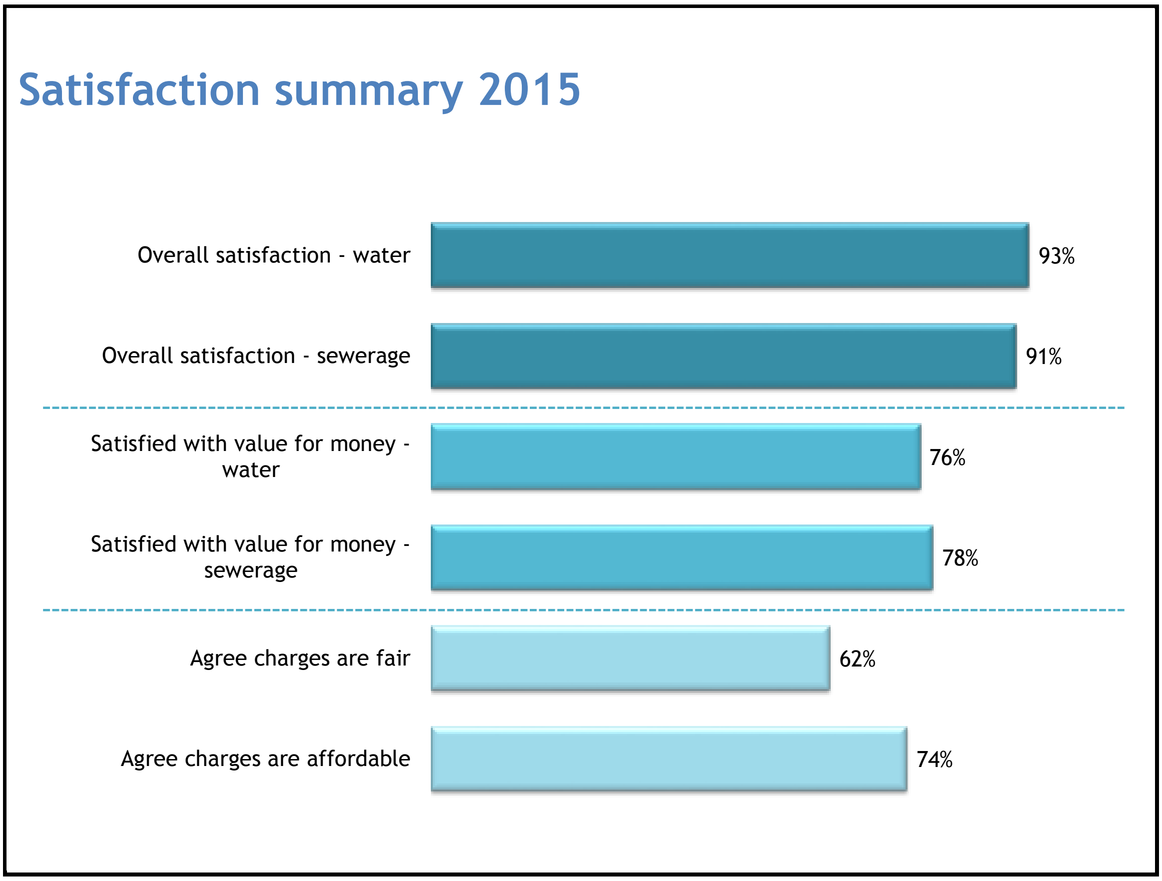
Trust underpins recommendations of water and sewerage suppliers

- Household customers do not currently have any choice over their supplier in the water industry; however, within this context they were asked, hypothetically, how likely they would be to recommend their water company to friends or family in order to calculate a Net Promoter Score (NPS). Just over four in ten (42%) are very likely to recommend (scores of 9 or 10), similar to 2014 (44%). The 2015 NPS[1] for the water industry is +17, significantly lower than the +23 measured in 2014. Scores ranged from -7 to +48 across all WaSCs and WoCs. Only two scored a negative NPS.

[1] Those giving scores of 0 to 6 are classified as Detractors, 7-8 Passives and 9 or 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

- Key drivers analysis identifies trust as the key influencer of NPS with high levels of trust in water companies driving promoters and low levels of trust influencing detractors (those least likely to recommend their supplier).

Figure 3: Satisfaction summary 2015



Satisfaction with water and sewerage services remains very high, and has been stable over the last five years

- In 2015 93% are satisfied overall with their water supply, slightly lower than in 2014 (94%). Scores have been consistently high over the last five years. This is the case for England and Wales.
- Overall satisfaction with sewerage services is stable at 91% and the five-year trend is also stable. However, there has been an upward trend in satisfaction for Wales over this period.
- Satisfaction levels for water and energy services are very similar (93% for water and gas, 92% for electricity and 91% for sewerage). Satisfaction with telephone landlines and broadband has dropped since 2014 to 87% and 78% respectively, leaving the water, sewerage and energy sectors significantly outperforming them.

Satisfaction with value for money has increased slightly in 2015, and has improved significantly over the last five years

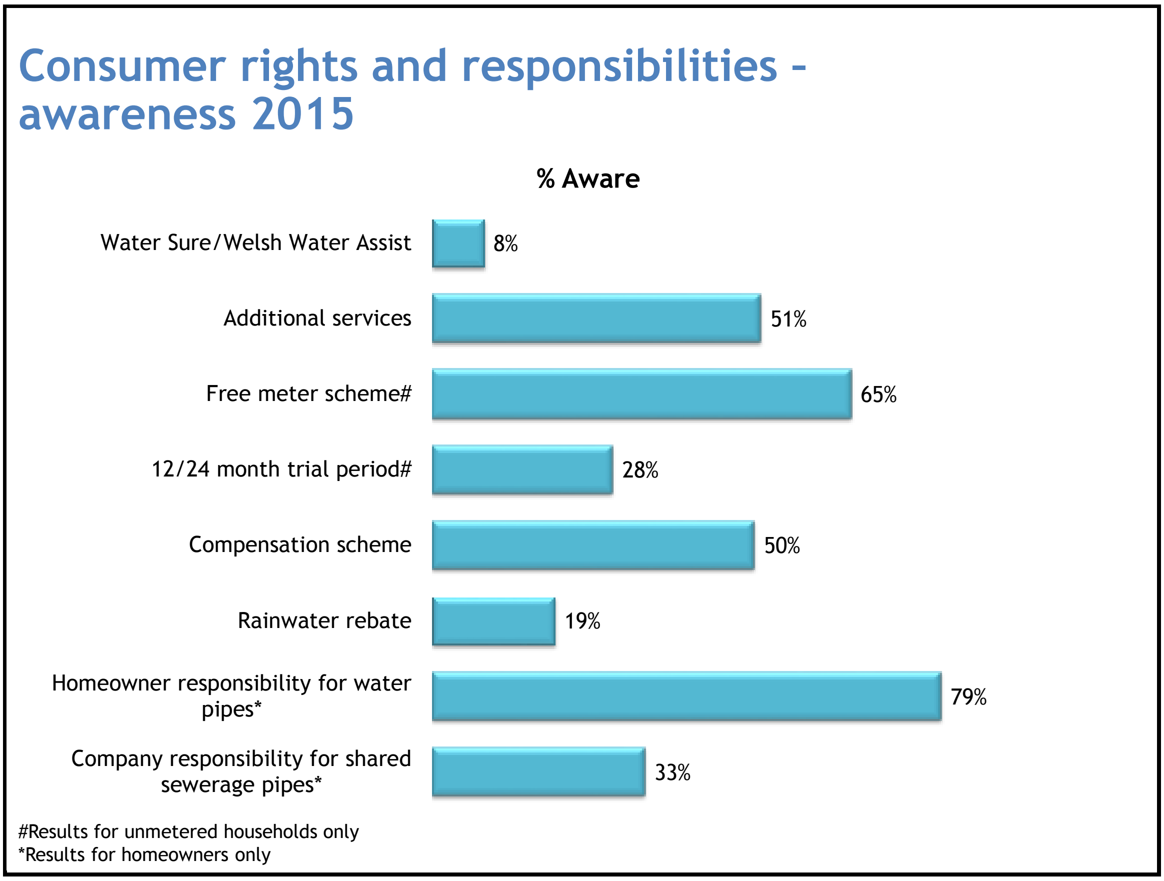
- There is an upward five-year trend in satisfaction with value for money of water services and satisfaction has continued to increase (albeit slightly) from 74% in 2014 to 76% in 2015. The upward trend is seen in both England and Wales, with satisfaction levels now significantly higher in Wales than in England in 2015.
- The same trends are seen for sewerage services where satisfaction levels are now 78% (up from 77% in 2014).

- To put the water industry figures in context, customers are also more satisfied with the value for money of all other household services (except broadband and council tax). Energy services remain marginally higher than the water industry (80% for electricity and gas compared to 76% for water and 78% for sewerage).

Perceptions of affordability, and of the fairness of charges have been stable over the last five years

- The proportions of customers who agree that their charges are affordable, or fair, are broadly stable over time.
- However, in terms of fairness there has been a significant fall since 2014, with 62% agreeing that their charges are fair compared to 68% twelve months ago. This fall has been driven by increased neutrality and views in a handful of water company areas.
- Customers are significantly more likely to agree that their charges are affordable than fair (74% vs. 62%); there has been little change on affordability over the last 12 months (76% in 2014). This trend is reflected in both England and Wales.
- Just under three quarters of customers (73%) would contact their supplier if they had a problem with their bill (a slight fall of 3% since 2014). This measure has been stable over the last five years at a total level and in England. However, in Wales, the likelihood of making contact has fallen over time.

Figure 4: Consumer rights and responsibilities - awareness 2015



Awareness of "Special Assistance" services has increased over time; awareness of other service and charging options is stable

- Awareness of "Special assistance" services has been stable at 51% since 2014; the five year trend however, is an upward one.
- Awareness of Water Sure/Welsh Water Assist is stable over five years, with just under one in ten currently aware (8%). However, an upward trend in Wales means that awareness there is now significantly higher than in England.
- Two-thirds of unmetered customers know of the free meter scheme (65%), a significant increase on 2014 (51%); however, just over a quarter (28%) are aware of the 12/24 month trial period, significantly fewer than in 2014 (30%).
- Customers' awareness of the compensation scheme for service failures (Guaranteed Standards Scheme) has increased significantly in the last 12 months in both England (42% to 50%) and Wales (43% to 55%). Over five years, awareness in England and Wales is stable, although upward for Wales.
- Awareness of the rebate given to customers where rainwater run-off from their property does not drain into a public sewer has increased slightly, but not significantly since this question was first asked in 2013. Currently almost one in five (19%) are aware, a small increase of 3% since 2014.

Homeowners remain confused about responsibilities for sewers and drains, but are clearer on their water supply pipe responsibilities

- Only a third of homeowners (33%) identify their sewerage company as being responsible for maintaining shared sewerage pipes (1% lower than in 2014). Awareness has remained at this same level since 2011, showing that the transition of ownership to sewerage companies is not widely known amongst customers. This is the case for both England and Wales.
- Conversely almost four fifths of homeowners (79%) correctly state that they themselves are responsible for maintaining the water pipes within their property's boundary. Awareness levels have been stable over the last five years, with awareness significantly higher in England than in Wales in 2015 (79% vs. 71%).

Satisfaction with contact handling in England has increased over time

- Satisfaction with contact improved from 76% in 2011 to 83% in 2014, with a slight dip to 81% in 2015. The five-year trend for England is one of significant improvement, and it is stable in Wales.
- Whilst satisfaction with individual aspects of contact is little changed since 2014, there are upward five-year trends for ease of contacting someone who could help, the quality/clarity of information provision, and the knowledge and professionalism of staff.

Key differences between England and Wales

- There are significantly more upward five-year trends for Wales than England. However, there are also some downward trends for Wales which don't apply in England (and downward trends in England which don't apply in Wales) – specifically for awareness that water meters are fitted free of charge and likelihood to contact water/sewerage company if worried about paying their bill.
- The differences when comparing 2015 results across England and Wales are highlighted in the table below.

Figure 5: England and Wales - key significant differences 2015

	England	Wales
Water/sewerage companies care about service provided to customers	72%	78%
Level of trust in water/sewerage companies	7.73	8.07
Extremely likely to recommend water company (9-10)	41%	52%
Satisfied with value for money of water services	75%	82%
Satisfied with value for money of sewerage services	77%	83%
Awareness of WaterSure/Welsh Water Assist	8%	13%
Homeowner awareness of their responsibility for maintaining water pipes	79%	71%
Satisfaction with colour and appearance of tap water	93%	98%
Satisfaction with water pressure	88%	93%
Satisfaction with taste and smell of tap water	87%	92%
Satisfaction with hardness/softness of water	70%	92%
Overall satisfaction with water supply	92%	98%
Satisfaction with reducing smells from sewage treatment works	81%	88%
Satisfaction with cleaning waste water properly before releasing it back into the environment	86%	92%
Overall satisfaction with sewerage services	90%	95%

1 Introduction

1.1 Background

1.1.1 The Consumer Council for Water (CCWater) has been representing customers and consumers of the water and sewerage industry in England and Wales since October 2005. CCWater operates through five committees, four in England and one in Wales.

1.1.2 CCWater wants consumers to receive (and to be able to recognise that they receive) good value for money and high standards in water and sewerage services, comparing well with the best of other service sectors.

1.1.3 Monitoring consumer opinion towards water and sewerage services is essential for CCWater to be able to identify and represent customer views; this survey of household bill payers has therefore been conducted annually since 2006. CCWater research has identified **five key consumer priorities**, and each year their Forward Work Programme is built around these:

- **Speaking up for water consumers** – being influential in achieving improvements for consumers.
- **Value for money** – a fair, affordable price and charging system.
- **Right first time** – problems sorted out quickly without difficulty.
- **Water on tap** – a safe, secure, reliable supply of water that is used wisely.
- **A sustainable, resilient sewerage system** – responsible removal of sewage, prevent of sewer flooding and reduction in persistent smells from sewage treatment works.

1.1.4 Each tracking survey provides valuable insights into customers' views on water and sewerage services over time. A comparison of the findings identifies and tracks any changes in customers' concerns about all aspects of water and sewerage services.

1.1.5 The survey was initially based on nine Water and Sewerage Company (WaSC) regions in England, and the Water and Sewerage Company region in Wales. Since 2012 the survey also included the customers of Water only Companies (WoCs), so that company specific findings are available while maintaining comparisons between WaSC regions. However, now with five years of company level data, the 2015 survey sees a move away from reporting findings and trends for the WaSC regions, to company specific reporting.

1.2 Research objectives

1.2.1 For each water company, to establish any changes to customer views over time and since the previous survey in 2014-15, allowing CCWater to:

- Understand customers' views about all aspects of water and sewerage services.
- Understand how customers' views change over time.
- Identify five-year trends for each company between 2011 and 2015 and any significant changes in the trend.
- Identify significant changes in customer views in England and Wales combined and individually between 2011 and 2015, and since the last survey was conducted in 2014.

1.2.2 These findings will enable CCWater to:

- Determine where it has added value or made an impact by measuring service provision and consumer perception of its impact and performance.
- Develop an effective communications strategy.

1.2.3 CCWater will use the research to:

- Provide greater legitimacy in representing customers.
- Provide a stronger evidence base on which to make policy decisions.
- Gauge customers' concerns and satisfaction with delivery of water and sewerage services.
- Develop their Forward Work Programme and Operational Business Plan.

1.3 Methodology

1.3.1 Telephone research was conducted with a random sample of households across England and Wales. Quota controls were set according to the 2011 Census.

1.3.2 Respondents were responsible, either solely or jointly, for paying their household's water bill.

1.3.3 Fieldwork took place between 24 September 2015 and 12 January 2016. This included a pilot survey of 40 customers to review interview length and routing.

1.3.4 A total of 5,964 twenty minute interviews were completed. CCWater commissioned 200 interviews for each of the 10 WaSCs and 150 for the 13 WoCs which equates to 3,950 interviews.

1.3.5 Each water company was given the opportunity to boost interview numbers and nine companies did so:

- Affinity Central – 100 additional interviews
- Affinity East – 50 additional interviews
- Affinity Southeast – 50 additional interviews
- Anglian – 200 additional interviews
- Bournemouth – 200 additional interviews
- Dŵr Cymru Welsh Water – 200 additional interviews
- Severn Trent – 300 additional interviews
- United Utilities – 200 additional interviews
- Wessex – 300 additional interviews
- Yorkshire – 200 additional interviews

The additional interviews have been included in the overall report and incorporate the weighting factors applied to the total sample.

1.3.6 As a result of the large sample size for England and Wales we can be 95% confident that the sample result reflects the actual population result to within the margin of error shown in Figure 6.

1.3.7 The questionnaire is similar to previous years, although it omits a few questions asked in previous surveys and includes a small number of new questions. This ensures that the survey addresses emerging issues as well as on-going ones that may be of interest to water customers.

1.3.8 The findings for each WaSC and WoC are included in this report, but are also published on CCWater's website: http://www.ccwater.org.uk/waterissues/himcd/

1.3.9 For ease of reference, where the text in the report refers to **water companies**, this means the collective of water and sewerage, and water only companies.

1.4 Analysis

1.4.1 Analysis has been undertaken at total sample level (England and Wales combined), by country (England versus Wales), and by water company.

1.4.2 The total data are weighted in line with the number of household water supply connections for each water company. This is different to previous years where data was weighted by the household sewerage service connections for each water and sewerage company in order to be representative of each WaSC region. More information on this can be found in Section 1.6 What's New?

1.4.3 All total charts show weighted data but give the unweighted base size. All individual company data is unweighted.

1.4.3 Demographic analysis is included where sample sizes are large enough to allow for reliable comparisons. However, commentary on demographic differences has only been included if they are significant and felt to be meaningful.

1.4.4 The table below shows the statistical reliability for the total sample size, by country, for each water company and for metered and unmetered households.

Figure 6: Statistical reliability

	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	5964	0.76	1.16	1.27
England	5417	0.80	1.22	1.33
Wales	547	2.51	3.84	4.19
Company sample sizes	150	4.80	7.33	8.00
	200	4.16	6.35	6.93
	250	3.72	5.68	6.20
	350	3.14	4.80	5.24
	400	2.94	4.49	4.90
	500	2.63	4.02	4.38
Metered households	2888	1.09	1.67	1.82
Unmetered households	3076	1.06	1.62	1.77
150: Bristol Water, Cambridge Water, Dee Valley Water, Essex & Suffolk Water, Hartlepool Water, Portsmouth Water, South East Water, South Staffordshire Water, Sutton & East Surrey Water				
200: Northumbrian Water, Southern Water, Thames Water, Affinity Water East, Affinity Water Southeast				
250: Affinity Water Central				
350: Bournemouth Water				
400: Anglian Water, Welsh Water, South West Water, United Utilities, Yorkshire Water				
500: Severn Trent Water, Wessex Water				

1.4.5 Significant differences have been highlighted on each chart by way of a coloured circle around the “Change since last year” figure – a green circle represents a significant increase and a red circle a significant decrease.

1.4.6 The sample was structured according to the Office of National Statistics (ONS) Census Data, 2011. Quotas were set for each water company, based on gender, age and socio economic classification (SEC) within each census region that the water company was situated.

1.4.7 Age groups were altered last year (2014) in order to reflect the revised 2011 census data bandings. They continue to fall into younger (18-29), middle (30-59) and older age ranges (60+). Comparisons aren’t generally made between the age groups year on year, but where this does happen, this change should be borne in mind.

1.4.8 In 2014, DJS Research commissioned a face to face omnibus survey of 1,000 with a representative sample for England and Wales in order to identify the proportion of younger bill payers in England and Wales. The survey discovered that only 27% of 18-29 year olds were responsible for paying their water bill. As a result, the age band quotas were adjusted accordingly and continue to be so.

1.4.9 The SEC[2] classifications used are:

1 - Higher managerial, administrative and professional occupations; lower managerial, administrative and professional occupations.

2 - Intermediate occupations; small employers and own account workers.

3 - Lower supervisory and technical occupations; semi-routine occupations; routine occupations.

4 - Never worked and long-term unemployed.

5 – Full-time students.

1.4.10 Customers without landlines continue to be included in the research. A target of 450 interviews was set with customers who describe themselves as not having a landline, or only using their landline for broadband purposes and 424 were achieved. These customers were contacted and interviewed on their mobile phones.

1.5 Cluster Analysis

1.5.1 Cluster analysis was carried out for the first time in 2013, and repeated in 2014 and 2015. Cluster analysis uses statistical techniques to segment customers into different groups depending on how they respond to the following questions:

- Value for money for both water and sewerage services.
- Overall satisfaction with water services and sewerage services.
- Affordability.
- Fairness.

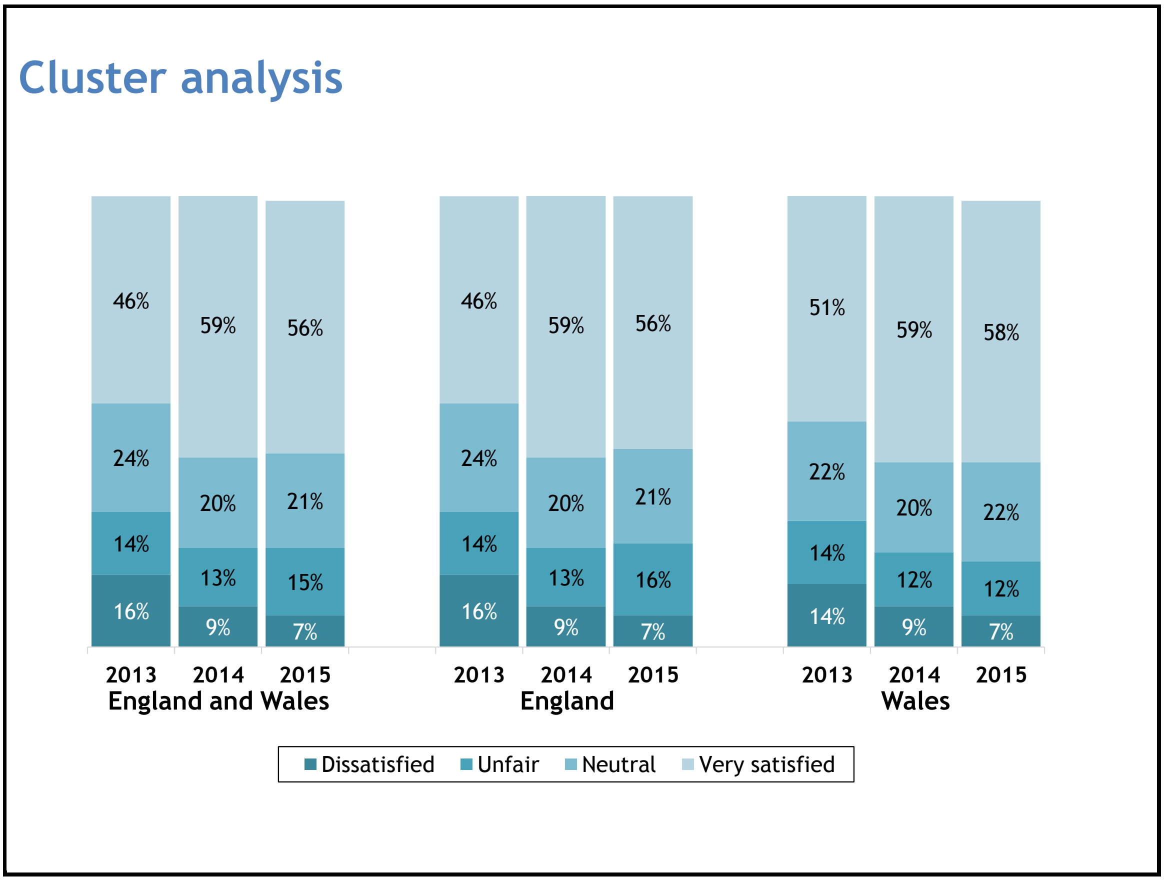
1.5.2 The cluster analysis has been re-run in 2015 using the same segmentation as in 2013 and 2014 and the proportions for this year are as follows:

- Cluster 1 – “Very Satisfied” – **56%** (59% 2014). This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster by far.

[2] SEG groupings used before 2014.

- Cluster 2 – "Neutral" – 21% (20% 2014). These customers feel neutral to satisfied with value for money, services, affordability and fairness. The second largest cluster and similar to 2014.
- Cluster 3 – "Unfair" – 15% (13% 2014). Neutral or satisfied on all measures, but feel their charges are unfair.
- Cluster 4 – "Dissatisfied" – 7% (9% 2014). This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied.

Figure 7: Clusters by country



1.5.3 The main characteristics of each cluster are:

- The 'Very satisfied' are more likely to be older customers (60+). Over three-fifths (62%) are aged 60 or over compared to 6% in the Dissatisfied cluster, 13% in the Unfair cluster and 18% of Neutrals. The 'Very Satisfied' are also less likely to have children in their household than the other clusters (71% Very Satisfied have no resident children, 66% Neutral, 64% Unfair, 62% Dissatisfied) and are more likely to be retired (43% Very Satisfied, 38% Neutral, 35% Unfair, 36% Dissatisfied).
- Those in the 'Dissatisfied' cluster are significantly more likely to be:
  - In intermediate occupations (27% vs. 22% of the total).
  - Unemployed or students (20% vs. 11% of the total).
  - In receipt of benefits (34% vs. 25% of the total).
  - In households where at least one person has a disability or long term illness (37% vs. 23% of the total).

  This cluster also has a higher than average representation of ethnic minorities (19% vs. 9% of the total).

- The differentiating characteristics of the Unfair cluster are a higher than average proportion of males (57% vs. 47% of the total), middle ages 45-59 year olds (41% vs. 35% of the total) and people in higher managerial occupations (49% vs. 41% of the total).
- The Neutrals cluster has a slightly higher than average proportion of customers who are unemployed/students compared to the average (20% vs. 11%), and a high proportion of households with children (31%) and, along with the Dissatisfied cluster, customers in receipt of benefits (29%).
- Any differences within the clusters are highlighted throughout the report.

1.6 What's new?

1.6.1 The research approach hasn't changed since 2014. However, the way in which the findings are presented within this report has changed this year, with a new company level approach being adopted rather than the regional comparisons of previous years.

1.6.2 Reporting is based on five-year trend analysis using Repeated Measures Analysis (adopting the Friedman non-parametric test because the test variables were not normally distributed). This approach irons out any short term fluctuations in results by providing a picture of changes over a longer time-scale.

1.6.3 The analysis produces a best-fit model for each question over five years and the linear trend derived from this is assessed for goodness of fit. The strength and direction of the trend gradient was tested to identify significant trends (is the trend flat, upward or downward?). A 95% level of confidence was adopted.

1.6.4 Data has been weighted by the number of household water supply connections for each of 23 water companies rather than by sewerage service connections as previously used for regional reporting. This is a more accurate method of weighting now that the research includes all 23 companies and a regional viewpoint is not needed. For consistency and comparability, it has been necessary to reweight 2011-2014 data by water supply connections and some national figures may be +/- 1% different to those shown in report from 2011-2014.

1.6.5 Key things to look out for in the new style tables are as follows:

1. **2015 base sample sizes:** this is the maximum number of customers that could respond. Note that, unless stated otherwise, the results exclude customers who answered 'don't know' from each base sample, and the actual base is likely to be slightly smaller. For exact base sizes, please refer to tabulations.
2. **Five-year rolling company average**: calculated for each individual company, except for the Industry as a whole and WaSC/WoC total – this is based on combined data (all 23 companies, 10 WaSCs and 13 WoCs).
3. **Five year company trend:** Due to rounding, some percentages may be +/- 1% different to previous years' figures in the line graph.
4. **Five-year company trend (time series analysis):** The analysis takes into consideration different sample sizes which companies may have had in the last five years, and establishes the overall direction of travel in customer perceptions of company performance. A black sideways arrow ↔ indicates that the trend is stable from 2011 to 2015. Upward trends are indicated by a green arrow ↑ and downward by a red arrow ↓ in the direction of the trend. There are some instances in the tables where the five-year trend of a company has not tested as significant but looks like it should be when compared to others. This is due to differing sample sizes between companies over the five-year analysis time frame. An example of this can be seen in Figure 12 where Anglian Water has a significant improving trend whereas Welsh Water has a stable trend.

5 **Company average vs. WaSC/WoC average:** Black sideways arrows indicate that the five-year average for the water company is not significantly higher or lower than the collective WaSC/WoC five-year average. Where there are significant differences, they are indicated by a green upward arrow or a red downward arrow. Depending on the range of responses, the top/bottom companies may or may not be significantly different to the average.

6 **Company change since last year**: where the company change this year is significant compared with the previous year (2014), it is indicated by emboldened text in either green (2015 significantly higher than 2014) or red (2015 significantly lower than 2014). Stable responses are indicated as an = sign.

7 Some percentage changes may be +/- 1% due to rounding. For example: in the example figure overleaf, the 2014 figure for Affinity Water East is 71% and for 2015 is 68% but the change since last year is 4%. This is because the true figure for 2014 is 71.32% and for 2015 is 67.57%, equalling a change of 3.75% which is then rounded up to 4%.

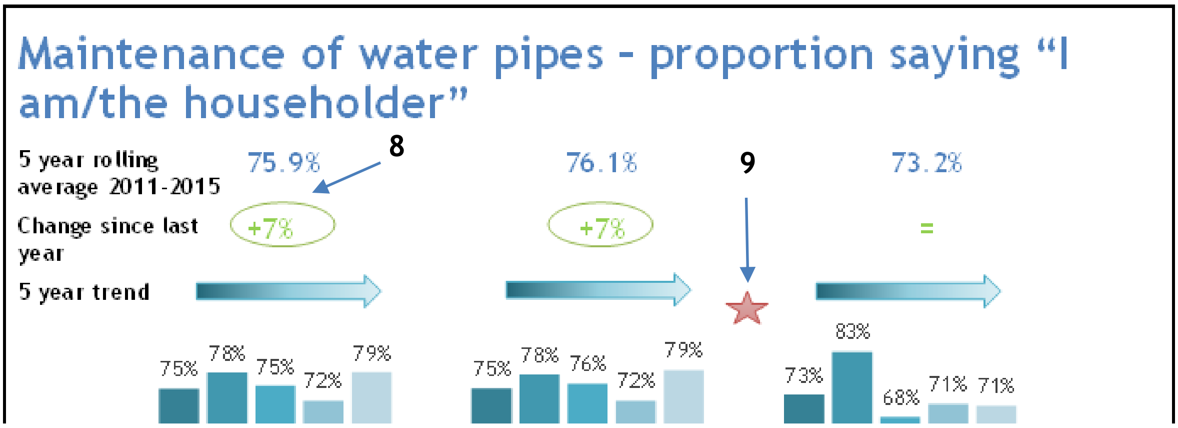
1	2	3					4	5	6
Water companies care about service provided to customers	**5 year rolling company average**	**Five year company trend** 2011	2012	2013	2014	2015	**5 year company trend**	**Company average vs WoC average**	**Company change since last year**
Industry (2015 base sample: 5964)	68.2%	68%	65%	63%	74%	73%	↑		
Total WoCs (2015 base sample: 2357)	66.9%	67%	62%	61%	72%	71%	↔	66.9%	
Affinity Water Central (2015 base sample: 250)	60.7%	65%	54%	49%	68%	66%	↔	↔	-2%
Affinity Water East (2015 base sample: 200)	67.1%	75%	59%	64%	71%	68%	↔	↔	-4%
Affinity Water Southeast (2015 base sample: 200)	64.8%	66%	65%	53%	72%	66%	↔	↔	-6%
Bournemouth Water (2015 base sample: 350)	72.0%	68%	67%	66%	86%	74%	↑	↔	**-12%**

7

1.6.6 Other things to look out for on the figures illustrating Industry findings and for England and Wales are as follows:

8. A green or red circle around the "change since last year" figure denotes a significant change.

9. A red star indicates a significant difference between England and Wales in 2015.



2 Speaking up for water consumers

This chapter details customer perception of how much water companies care about the services they provide to their customers, and shows the level of customer trust in their water and/or sewerage company.

Key trends

- Perception of water company care and the level of customer trust in water companies have improved over the last five years.
- Ratings for customers in Wales are significantly higher than for England for both care and trust.

What's new in 2015?

- Net Promoter Scores (NPS) vary greatly by individual water company, but only two companies have a negative NPS score.
- Key driver analysis shows that out of a range of satisfaction measures, trust has the strongest influence on NPS; high levels of trust in water companies drives active promoting, whilst low levels of trust influences detractors.

2.1 Companies caring about the service they provide

2.1.1 Customers are asked how much they agree or disagree that their water company cares about the service it gives to customers. Nearly three-quarters (73%) agree that their water company cares about the service they provide to customers.

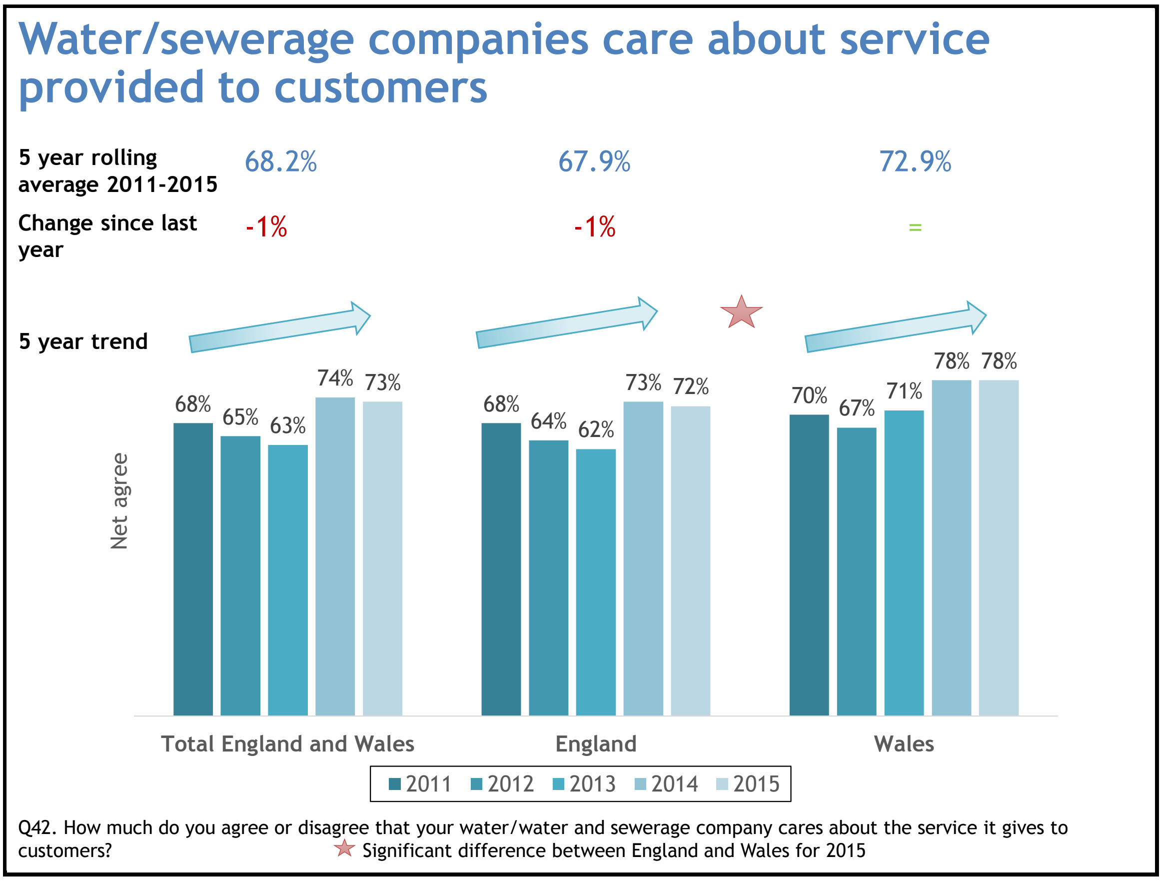
2.1.2 There has been an upward trend in agreement over the last five years, for England and Wales combined and for each individual country.

2.1.3 Customers in Wales rate significantly higher than those in England, both this year and when comparing the rolling average over five years.

2.1.4 Older customers (75+ 84%) are significantly more likely to say their water company cares than younger customers (18-29 70%, 30-44 70%, 45-59 69%, 60-74 75%).

2.1.5 Customers who are satisfied with their water and sewerage services are also significantly more likely to say that their company cares than those who are dissatisfied.

Figure 8: Perceptions of water company care about service provided to customers



Sample base: all respondents excluding don't knows (*click here* to see exact figures)

2.1.6 Over the past five years there has been an upward trend (indicated by green upward arrows in Figure 9) for four WaSCs: Anglian Water, Welsh Water, United Utilities and Yorkshire Water. The trend for all other WaSCs is stable (indicated by the black sideways arrow).

2.1.7 Welsh Water customers rate highest of the 10 WaSCs (78%), whereas South West Water customers rate lowest (66%), closely followed by Thames Water customers (67%). None of the averages are significantly different to the total WaSC average (indicated by black sideways arrows in Figure 9).

Figure 9: Water companies care about service provided to customers - WaSCs

Water companies care about service provided to customers	5 year rolling company average	Five year company trend 2011	2012	2013	2014	2015	5 year company trend	Company average vs WaSC average	Company change since last year
Industry[3] (2015 base sample: 5964)	68.2%	68%	65%	63%	74%	73%	↑	n/a	n/a
Total WaSCs (2015 base sample: 3607)	68.6%	68%	65%	63%	74%	73%	↔	68.6%	n/a
Anglian Water (2015 base sample: 401)	70.2%	66%	67%	59%	75%	77%	↑	↔	+2%
Dŵr Cymru Welsh Water (2015 base sample: 402)	73.4%	70%	67%	71%	78%	78%	↑	↔	=
Northumbrian Water (2015 base sample: 201)	73.8%	75%	70%	72%	78%	77%	↔	↔	=
Severn Trent Water (2015 base sample: 500)	69.6%	71%	61%	65%	75%	72%	↔	↔	-3%
South West Water (2015 base sample: 401)	62.3%	62%	57%	61%	67%	66%	↔	↔	-2%
Southern Water (2015 base sample: 201)	64.1%	58%	69%	58%	68%	68%	↔	↔	=
Thames Water (2015 base sample: 200)	63.3%	68%	66%	55%	66%	67%	↔	↔	+1%
United Utilities (2015 base sample: 401)	71.1%	67%	64%	65%	78%	75%	↑	↔	-3%
Wessex Water (2015 base sample: 500)	74.3%	72%	78%	66%	78%	77%	↔	↔	-1%
Yorkshire Water (2015 base sample: 400)	71.2%	68%	63%	66%	80%	75%	↑	↔	-5%

2.1.8 Of the WoCs (Figure 10), South Staffordshire Water's rating has increased significantly since last year (from 72% to 81% in 2015), whereas Bournemouth Water and Portsmouth Water customers' ratings have fallen significantly (from 86% to 74% and 82% to 73% respectively).

2.1.9 Despite the fall, Bournemouth Water has witnessed an upward trend over the past five years, along with South Staffordshire and Sutton & East Surrey Water.

2.1.10 Hartlepool Water has the highest rating of the WoCs (84%) and Essex & Suffolk Water, Affinity Water Southeast and Affinity Water Central have the lowest (66%), closely followed by Affinity Water East (68%).

[3] Water industry as a whole, i.e. All WaSCs and WoCs in England and Wales.

2.1.11 Hartlepool Water's five-year rolling average is significantly higher than the WoC five-year rolling average.

Figure 10: Water companies care about service provided to customers - WoCs

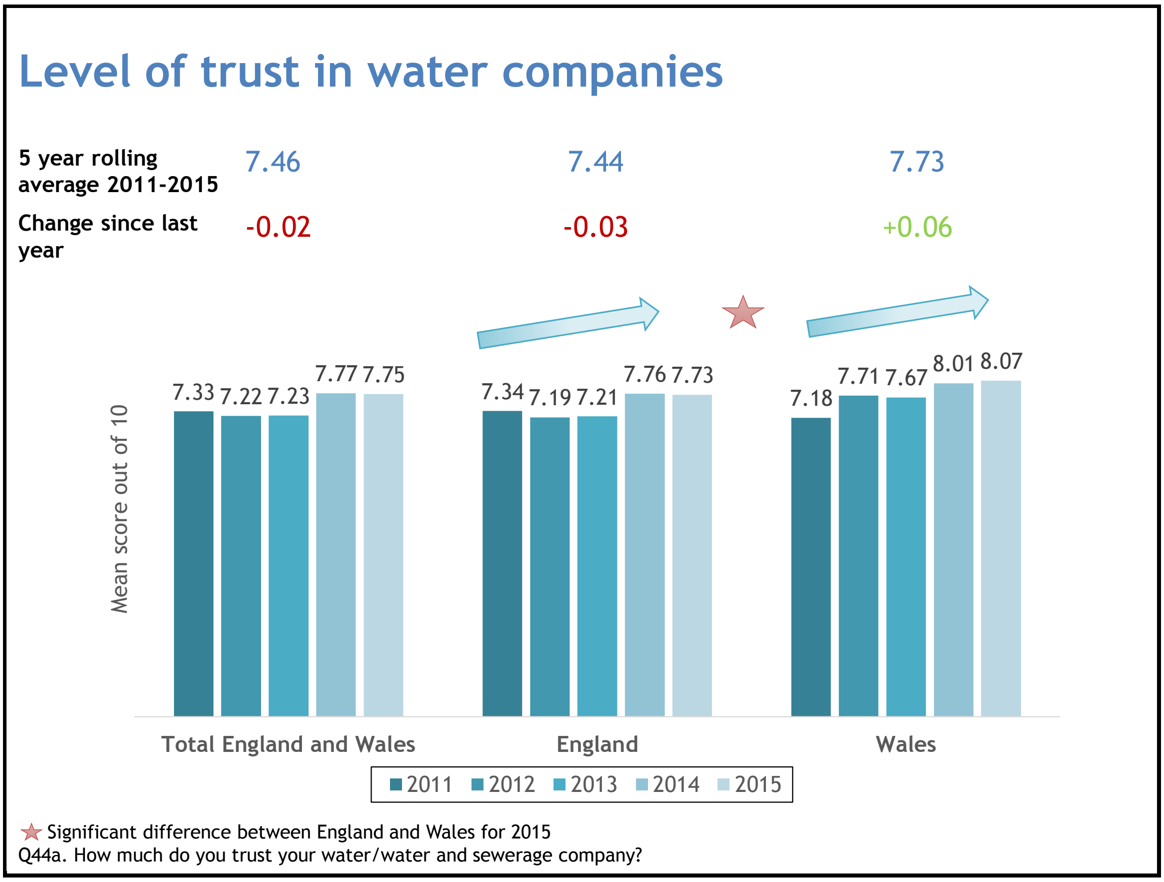
Water companies care about service provided to customers	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	68.2%	68%	65%	63%	74%	73%	↑	n/a	n/a
Total WoCs (2015 base sample: 2357)	66.9%	67%	62%	61%	72%	71%	↔	66.9%	n/a
Affinity Water Central (2015 base sample: 250)	60.7%	65%	54%	49%	68%	66%	↔	↔	-2%
Affinity Water East (2015 base sample: 200)	67.1%	75%	59%	64%	71%	68%	↔	↔	-4%
Affinity Water Southeast (2015 base sample: 200)	64.8%	66%	65%	53%	72%	66%	↔	↔	-6%
Bournemouth Water (2015 base sample: 350)	72.0%	68%	67%	66%	86%	74%	↑	↔	-12%
Bristol Water (2015 base sample: 150)	75.3%	74%	77%	72%	77%	77%	↔	↔	=
Cambridge Water (2015 base sample: 150)	76.1%	77%	70%	74%	85%	77%	↔	↔	-8%
Dee Valley Water (2015 base sample: 150)	73.3%	76%	68%	65%	80%	77%	↔	↔	-3%
Essex & Suffolk Water (2015 base sample: 150)	66.9%	67%	66%	68%	67%	66%	↔	↔	-1%
Hartlepool Water (2015 base sample: 154)	80.9%	82%	76%	78%	86%	84%	↔	↑	-2%
Portsmouth Water (2015 base sample: 151)	70.0%	71%	59%	71%	82%	73%	↔	↔	-9%
South East Water (2015 base sample: 149)	62.6%	64%	62%	57%	69%	70%	↔	↔	+1%
South Staffs Water (2015 base sample: 151)	69.1%	66%	64%	67%	72%	81%	↑	↔	9%
Sutton & East Surrey Water (2015 base sample: 152)	67.0%	65%	62%	63%	77%	72%	↑	↔	-5%

2.2 Trust in water and sewerage companies

2.2.1 Customers were asked how much they trusted their water company on a scale of 1 to 10, where 1 means “not at all” and 10 means “trust them completely”. Scores are little changed from 2014, although there has been an upward trend over the past five years.

2.2.2 Levels of trust are significantly higher in Wales than in England this year.

Figure 11: Level of trust in water companies



2.2.3 There has been an upward trend over the past five years for three WaSCs: Anglian Water, Northumbrian Water and United Utilities.

2.2.4 Northumbrian Water customers rate highest of the 10 WaSCs (8.15), whereas South West Water customers rate lowest (7.25), followed by Southern Water customers (7.28). Customers of Welsh Water (7.77) and Wessex Water (7.75) have significantly greater levels of trust in their respective companies than the total WaSC average (7.46).

Figure 12: Level of trust in water companies - WaSCs

Level of trust in water companies	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	7.46	7.33	7.22	7.23	7.77	7.75	↑	n/a	n/a
Total WaSCs (2015 base sample: 3607)	7.46	7.34	7.25	7.22	7.77	7.73	↑	7.46	n/a
Anglian Water (2015 base sample: 401)	7.57	7.20	7.46	7.20	7.90	7.79	↑	↔	-0.11
Dŵr Cymru Welsh Water (2015 base sample: 402)	7.77	7.14	7.72	7.69	8.03	8.06	↔	↑	+0.02
Northumbrian Water (2015 base sample: 201)	7.71	7.49	7.37	7.69	8.18	8.15	↑	↔	-0.03
Severn Trent Water (2015 base sample: 500)	7.58	7.45	7.38	7.36	7.85	7.69	↔	↔	-0.16
South West Water (2015 base sample: 401)	7.01	7.00	6.75	6.89	7.16	7.25	↔	↔	+0.09
Southern Water (2015 base sample: 201)	7.10	7.21	6.82	6.96	7.35	7.28	↔	↔	-0.07
Thames Water (2015 base sample: 200)	7.20	7.46	7.07	6.93	7.35	7.40	↔	↔	+0.05
United Utilities (2015 base sample: 401)	7.51	7.20	7.12	7.03	8.00	7.80	↑	↔	-0.21
Wessex Water (2015 base sample: 500)	7.75	7.73	7.49	7.45	7.94	7.97	↔	↑	+0.03
Yorkshire Water (2015 base sample: 400)	7.64	7.39	7.28	7.45	7.89	8.05	↔	↔	+0.16

2.2.5 Over the past five years there has been an upward trend in trust for three WoCs: South East Water, Sutton & East Surrey Water and Affinity Water Central.

2.2.6 Levels of trust for Cambridge Water and Affinity Water East have fallen significantly since 2014 (from 8.19 to 7.71 and 7.85 to 7.22 respectively).

2.2.7 Hartlepool Water has the highest ratings of the WoCs (8.33) and Affinity Water East has the lowest (7.22).

2.2.8 Hartlepool Water's five-year rolling average is significantly higher than the aggregate WoC five-year rolling average.

Figure 13: Level of trust in water companies – WoCs

Level of trust in water companies	5 year rolling company average	Five year company trend: 2011	2012	2013	2014	2015	5 year company trend	Company average vs WoC average	Company change since last year
Industry (2015 base sample: 5964)	7.46	7.33	7.22	7.23	7.77	7.75	↑	n/a	n/a
Total WoCs (2015 base sample: 2357)	7.47	7.32	7.14	7.28	7.78	7.83	↔	7.47	n/a
Affinity Water Central (2015 base sample: 250)	7.27	7.02	6.90	7.11	7.74	7.68	↑	↔	-0.07
Affinity Water East (2015 base sample: 200)	7.41	7.56	7.13	7.38	7.85	7.22	↔	↔	-0.63
Affinity Water Southeast (2015 base sample: 200)	7.27	7.11	7.36	6.83	7.46	7.54	↔	↔	+0.07
Bournemouth Water (2015 base sample: 350)	7.67	7.46	7.44	7.47	8.03	7.90	↔	↔	-0.13
Bristol Water (2015 base sample: 150)	7.60	7.31	7.37	7.66	7.73	7.81	↔	↔	+0.07
Cambridge Water (2015 base sample: 150)	7.71	7.49	7.78	7.47	8.19	7.71	↔	↔	-0.49
Dee Valley Water (2015 base sample: 150)	7.71	7.67	7.53	7.41	7.80	8.28	↔	↔	+0.47
Essex & Suffolk Water (2015 base sample: 150)	7.49	7.36	7.43	7.38	7.63	7.93	↔	↔	+0.29
Hartlepool Water (2015 base sample: 154)	8.12	8.19	7.77	7.89	8.55	8.33	↔	↑	-0.22
Portsmouth Water (2015 base sample: 151)	7.59	7.60	7.13	7.59	8.19	7.67	↔	↔	-0.53
South East Water (2015 base sample: 149)	7.17	7.27	6.82	6.83	7.66	7.87	↑	↔	+0.20
South Staffs Water (2015 base sample: 151)	7.70	7.70	7.33	7.69	7.75	8.19	↔	↔	+0.44
Sutton & East Surrey Water (2015 base sample: 152)	7.30	7.20	6.81	7.24	7.90	7.61	↑	↔	-0.30

2.2.9 Customers who are satisfied with value for money of water and sewerage services are significantly more likely to trust their water company.

2.2.10 Households with a landline are also significantly more likely to trust their water company than mobile only households.

2.2.11 Internet users are significantly less likely to trust their water company than those who do not use the internet.

2.2.12 Both these differences are linked to the demographic profile of these groups, as older respondents (60+) are more likely to trust their water company than younger respondents (18-59) and landline only customers tend to be in the older age group, as do non-internet users.

2.3 Net Promoter Score

2.3.1 New in 2014, customers were asked to imagine that they could choose their water and sewerage supplier and, this being the case, how likely they would be to recommend their provider to friends and family on a scale of 0 to 10, where 0 means highly unlikely to recommend and 10 means extremely likely.

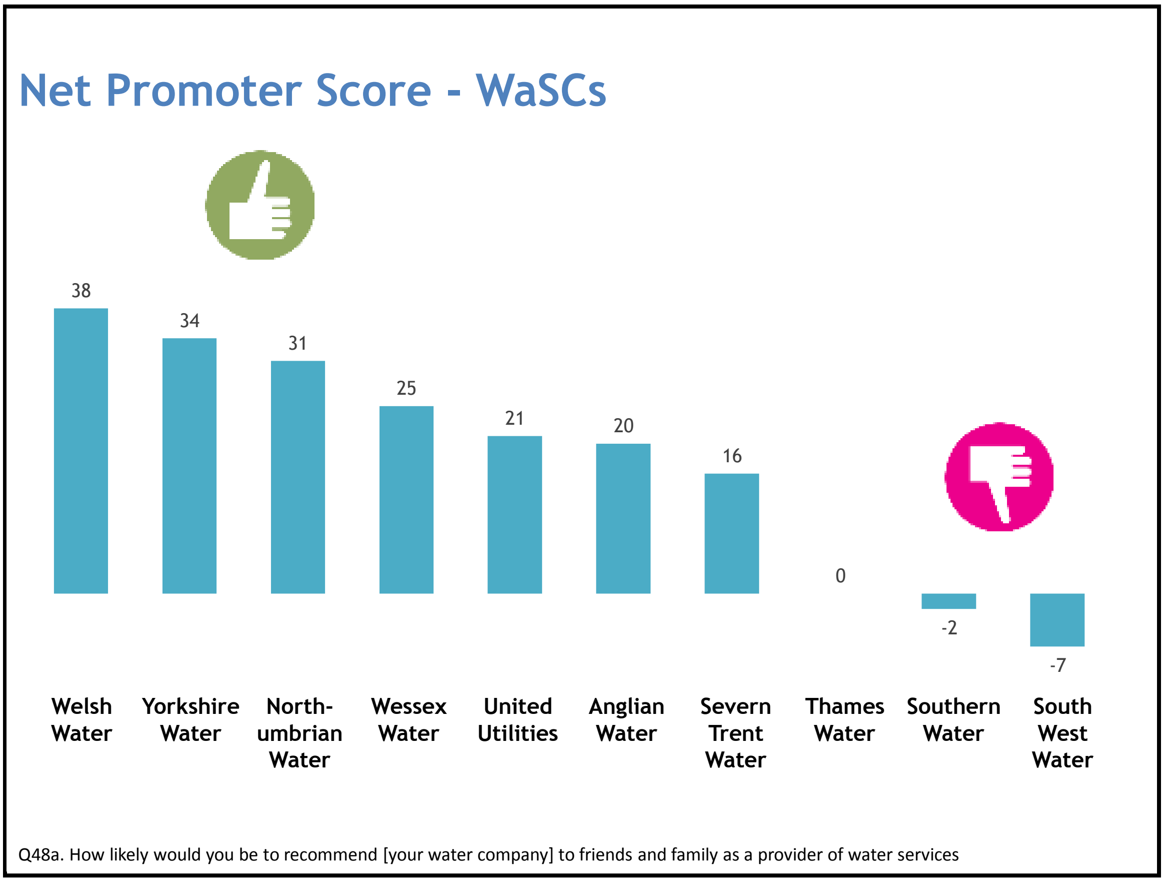
2.3.2 Those giving scores of 0 to 6 are classified as Detractors, 7-8 Passives and 9 or 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

2.3.3 The higher the NPS score, the more positive customers are. A negative score is possible where there are more detractors than promoters. There are only two WaSCs with a negative score, namely Southern Water (-2) and South West Water (-7). All others have scores of between 38 (Welsh Water) and 0 (Thames Water).

2.3.4 To put this into some context, an Energy UK report published in November 2015, shows the NPS for suppliers in the energy industry as -21. One quarter (25%) are Promoters and less than half (46%) are Detractors[4]. Comparatively speaking, the water industry is viewed more favourably, albeit the context is different as there is currently no option for household customers to choose their supplier in the water industry.

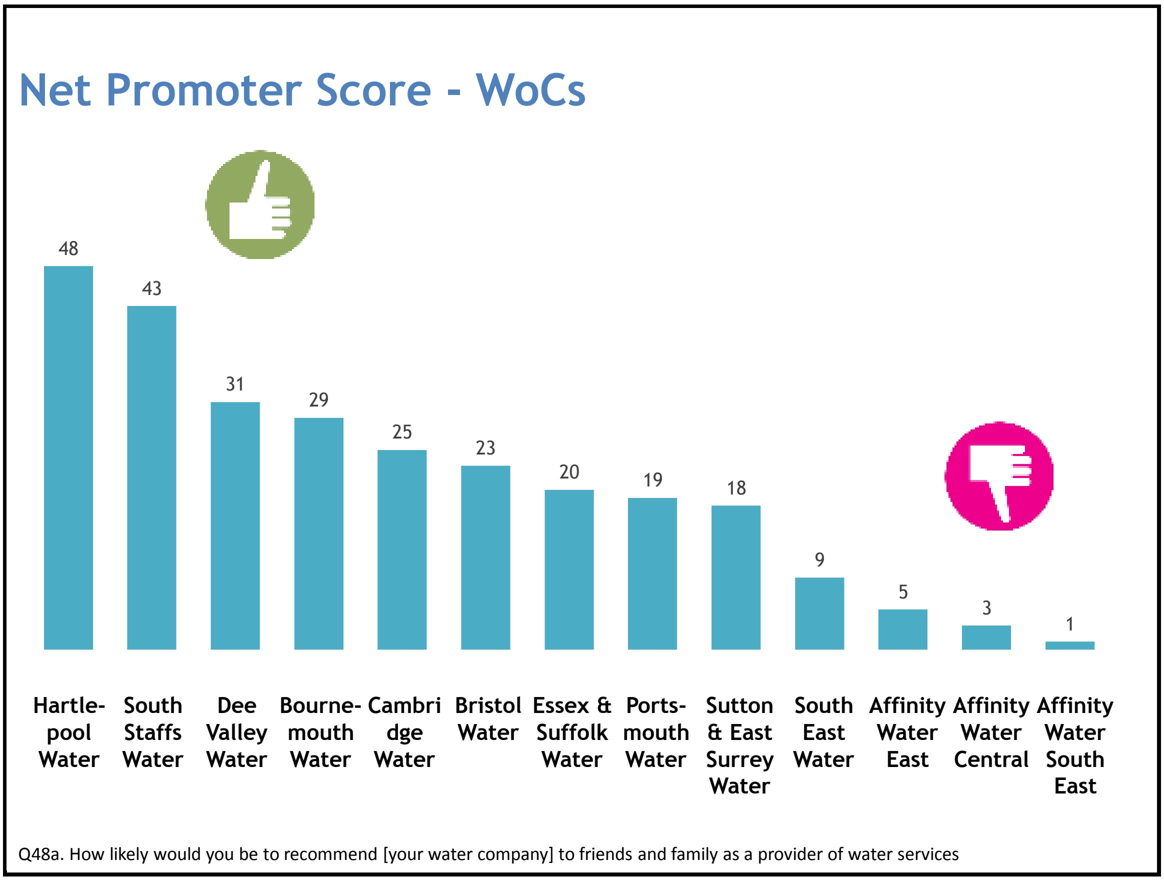
[4]Page 32, http://www.energy-uk.org.uk/publication.html?task=file.download&id=5611

Figure 14: Net Promoter Score - WaSCs



2.3.5 All WoCs have a positive NPS score, ranging from 48 (Hartlepool Water) to 1 (Affinity South East).

Figure 15: Net Promoter Score - WoCs



2.4 Key drivers analysis

2.4.1 This year, key drivers analysis was carried out to identify what aspects of water services most influenced NPS i.e. likelihood to be a promoter or a detractor.

2.4.2 To undertake the drivers analysis, the main variable looked at within the data was '*how likely are you to recommend your water company to friends or family?* Respondents rated their likelihood to recommend based on a scale from 0-10. The drivers analysis looks at what is driving those who are classed as promoters (giving a score of 9 or 10 out of 10) and what is driving those classed as detractors (those giving a 0-6 out of 10).

2.4.3 Both the 2014 and 2015 data has been used to undertake this analysis (total unweighted base of 11,727 cases). This was done to increase the base sample size for the analysis of detractors who made up a smaller proportion of the sample. Within the combined sample of 2014 and 2015 data, 43% were promoters and 24% were detractors. The remaining 33% of respondents were passive.

2.4.4 The analysis looked across a range of predictor variables to understand what is driving promoters and detractors. This covered all the different aspects of water services including customer satisfaction with different elements of water provision, their feelings about value for money/trust and care together with their awareness of services from their water company. Only questions that were included in both the 2014 and 2015 surveys were included in this analysis.

2.4.5 Figure 15 overleaf outlines the factors that have the strongest influence within the predictive model (or strength of importance) in influencing NPS. These factors have been ranked by strength of influence (or importance).

2.4.6 This analysis, looking at what is driving NPS has found that trust is the key influence on NPS with high levels of trust in water companies driving active promoting whilst low levels of trust influences detractors. Trust has more of an impact on NPS than any other variable.

2.4.7 Interestingly, overall satisfaction with water services is not a key driver of NPS (positive or negative), and is towards the bottom of the list of drivers. This suggests that people can be satisfied with the service that they receive, but this would still not have a high impact on their likelihood to recommend.

2.4.8 For many of the attributes that are drivers, high scores drive promoters and low scores drive detractors on the same attribute. In some areas, different attributes drive promoters but not detractors and vice versa. For example, if people feel they are not responsible for their water pipes they are more likely to be a promoter. Any attributes that are not a driver for both detractors and promoters are shaded.

Figure 16: What are the key drivers of NPS/likelihood to recommend supplier?

Rank	Promoters (R^2= 46.3%)[5]	Detractor (R^2= 41.1%)
1	Trust water company (score 9 or 10)	Trust water company (Score 1 to 6)
2	Charges are fair (agree)	Value for money Water (not satisfied)
3	Hardness/softness of water (satisfied)	Water company cares (do not agree)
4	Responsibility for water pipes (**not** me/the householder)	Charges are affordable (do not agree)
5	Value for money Water (satisfied)	Colour and appearance of tap water (not satisfied)
6	Water company cares (agree)	Reason to complain and didn't
7	WaterSure/Welsh Water Assist (aware)	Charges are fair (do not agree)
8	Overall satisfaction with water (satisfied)	Hardness/softness of water (not satisfied)
9	Likely to contact if worried about bill	Water pressure (not satisfied)
10	Water pressure (satisfied)	**Unlikely** to contact if worried about bill
11	Reliability of water supply (satisfied)	Overall satisfaction with water (not satisfied)
12	Safety of drinking water (satisfied)	

2.4.9 Survey results this year show that overall perceptions of trust are positive and have an upward trend over five-years. Currently, the score for trust is 7.75 out of 10. However, key drivers analysis suggests that water companies may benefit further if they can increase levels of trust. Even small increases in scores for trust could lead to increases in NPS because it is the overriding driver. Far bigger changes would be needed with the lower order drivers to see a change in NPS, and so trust needs to be a key area to focus improvements on for the future.

[5] R^2 is an index ranging from 0 to 100%.
It is the proportion of those likely to recommend their water company that is explained by the aspects of water provision contained within the model (i.e. these factors taken together).
When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the likelihood – thus they are less useful in predicting and modelling the dependent variable.
In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings.
The R^2 value achieved by the model of NPS promoters is 46.3% which is rated as good. The R^2 value achieved by the model of NPS detractors is 41.1% which is also rated as good.

3 Value for money

This chapter covers customers' views on the charges they pay for the water and sewerage services they receive. These include value for money, fairness and affordability.

Key five-year trends

- There have been upward five-year trends for satisfaction with value for money of water services, and of sewerage services.
- The five-year trends for agreement that water and/or sewerage charges are fair and that they are affordable are both stable.

Key changes since 2014

- Views on value for money and affordability are broadly unchanged from 2014.
- Around three-quarters are satisfied with the value for money of their water (76% vs. 74% in 2014) and sewerage services (78% vs. 77% in 2014).
- Agreement that charges are affordable has fallen slightly, but not significantly, to 74% (76% in 2014).
- However, perceptions of fairness have fallen significantly from 68% agreeing that their water and/or sewerage charges were fair in 2014 to 62% in 2015.
- Over seven in ten (73%) would contact their supplier if they were worried about paying their bill, slightly fewer than in 2014 (76%).

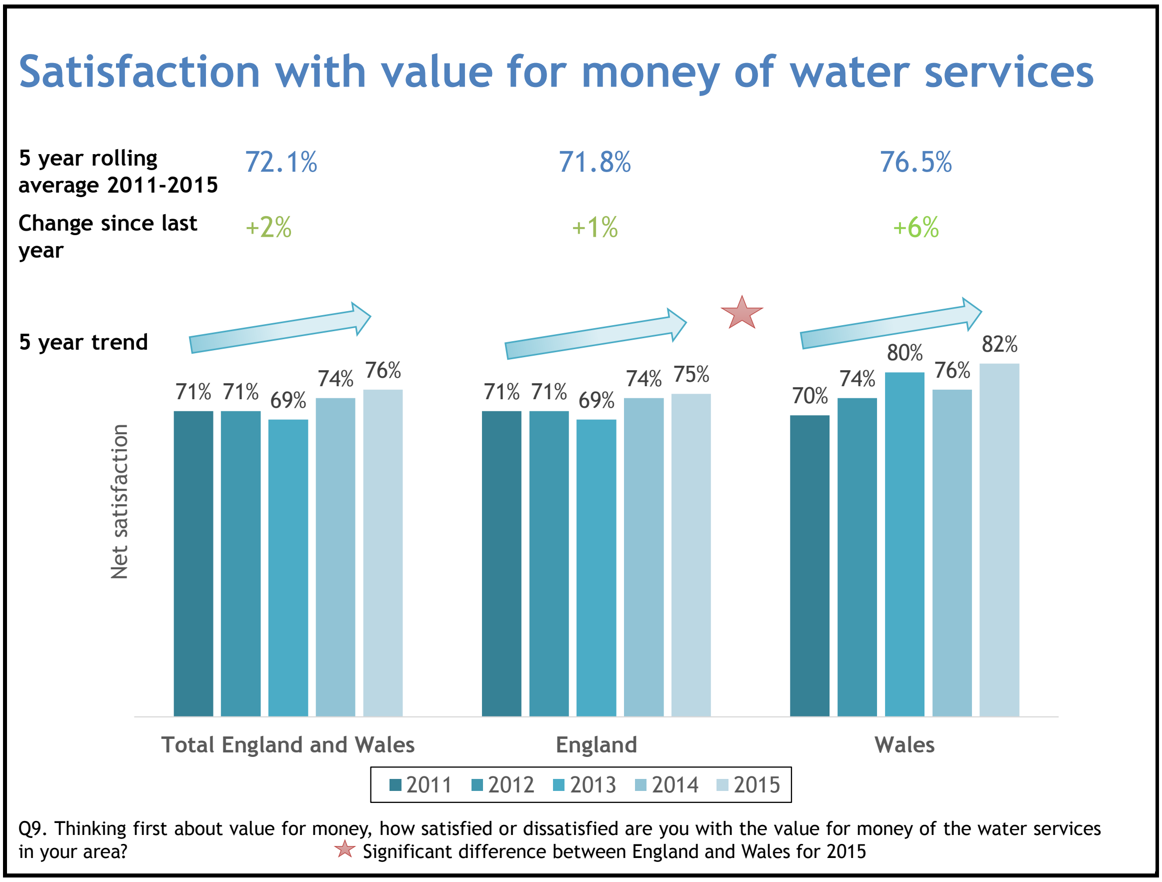
3.1 Value for money of water services

3.1.1 Three-quarters of customers in England and Wales (76%) are satisfied with the value for money of water services, slightly higher than in 2014 (74%). The proportion of customers who are "very satisfied" has increased by 2% from 33% in 2014 to 36% in 2015.

3.1.2 Satisfaction in Wales is significantly higher than in England (82% compared with 75%).

3.1.3 There is an upward five-year trend in both England and Wales individually.

Figure 17: Satisfaction with value for money of water services



3.1.4 As in previous years, there is a strong link between views on value for money and overall satisfaction with water supply. Virtually all (98%) of those satisfied with value for money are also satisfied with their water supply.

3.1.5 Fewer customers are dissatisfied with value for money than in 2014 – a small decrease from 12% to 10% in 2015. Dissatisfied customers are significantly more likely to have contacted their water company than not (16% compared to 9%).

3.1.6 In 2015 the average satisfaction level for all WaSCs is 75% and there has been an upward five-year trend. The 2015 average for all WoCs is 79%, and the five year trend is stable.

3.1.7 Six WaSCs have an upward five-year trend, namely Anglian Water, Welsh Water, Severn Trent Water, South West Water, United Utilities and Wessex Water, with the remaining four companies stable over five years.

3.1.8 Welsh Water and Yorkshire Water have the highest levels of satisfaction with value for money of water services.

3.1.9 South West Water is the only WaSC to have a significantly lower five-year average than the overall WaSC average; none of the other WaSCs are significantly different to the overall WaSC average. However, there are positive indications for South West Water which has experienced an upward five-year trend.

3.1.10 Awareness of the Government contribution of £50 towards water and sewerage bills of South West Water customers, which was introduced in April 2013, remains stable at two thirds of customers aware (67% in 2015, 66% in 2014, 69% 2013).

3.1.11 There are no significant changes in perceptions of value for money for WaSCs from 2014 to 2015.

Figure 18: Satisfaction with value for money of water services - WaSCs

Satisfaction with value for money of water services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	72.1%	71%	71%	69%	74%	76%	↑	n/a	n/a
Total WaSCs (2015 base sample: 3607)	71.8%	70%	71%	69%	74%	75%	↑	71.8%	n/a
Anglian Water (2015 base sample: 401)	72.8%	71%	69%	71%	74%	77%	↑	↔	+3%
Dŵr Cymru Welsh Water (2015 base sample: 402)	76.4%	69%	74%	81%	75%	82%	↑	↔	+6%
Northumbrian Water (2015 base sample: 201)	77.9%	83%	74%	78%	77%	77%	↔	↔	=
Severn Trent Water (2015 base sample: 500)	73.5%	69%	71%	72%	77%	75%	↑	↔	-2%
South West Water (2015 base sample: 401)	50.9%	35%	53%	51%	56%	58%	↑	↓	+2%
Southern Water (2015 base sample: 201)	67.9%	67%	68%	68%	70%	66%	↔	↔	-4%
Thames Water (2015 base sample: 200)	70.7%	72%	79%	63%	70%	74%	↔	↔	+4%
United Utilities (2015 base sample: 401)	70.1%	68%	66%	64%	75%	73%	↑	↔	-2%
Wessex Water (2015 base sample: 500)	73.7%	64%	73%	74%	78%	76%	↑	↔	-2%
Yorkshire Water (2015 base sample: 400)	77.0%	80%	71%	73%	78%	82%	↔	↔	+4%

3.1.12 Hartlepool Water, Bournemouth Water, Dee Valley Water and South Staffordshire Water all have upward five-year trends for satisfaction with value for money of water services.

3.1.13 Hartlepool Water customers consistently rate their satisfaction with value for money of water services as high, and they are the highest in 2015 (88%). Hartlepool Water has a significantly higher level of satisfaction with value for money of water services than the 2015 WoC average.

3.1.14 Both Bristol Water and South East Water customers have rated their satisfaction significantly higher than in 2014 (from 70% to 82% and 72% to 83% respectively).

Figure 19: Satisfaction with value for money of water services - WoCs

Satisfaction with value for money of water services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	72.1%	71%	71%	69%	74%	76%	↑	n/a	n/a
Total WoCs (2015 base sample: 2357)	73.1%	73%	69%	70%	75%	79%	↔	73.1%	n/a
Affinity Water Central (2015 base sample: 250)	71.1%	74%	64%	62%	74%	78%	↔	↔	+5%
Affinity Water East (2015 base sample: 200)	74.1%	75%	71%	77%	78%	71%	↔	↔	-8%
Affinity Water Southeast (2015 base sample: 200)	70.5%	74%	70%	63%	72%	72%	↔	↔	=
Bournemouth Water (2015 base sample: 350)	75.4%	69%	71%	79%	81%	78%	↑	↔	-3%
Bristol Water (2015 base sample: 150)	72.8%	76%	71%	72%	70%	82%	↔	↔	+12%
Cambridge Water (2015 base sample: 150)	78.5%	78%	79%	75%	80%	81%	↔	↔	+1%
Dee Valley Water (2015 base sample: 150)	75.9%	74%	71%	71%	86%	80%	↑	↔	-6%
Essex & Suffolk Water (2015 base sample: 150)	71.1%	73%	66%	72%	75%	70%	↔	↔	-5%
Hartlepool Water (2015 base sample: 154)	82.1%	80%	80%	80%	85%	88%	↑	↑	+3%
Portsmouth Water (2015 base sample: 151)	80.3%	81%	75%	88%	79%	81%	↔	↔	+1%
South East Water (2015 base sample: 149)	70.1%	69%	71%	64%	72%	83%	↔	↔	+11%
South Staffs Water (2015 base sample: 151)	74.6%	71%	70%	74%	77%	85%	↑	↔	+8%
Sutton & East Surrey Water (2015 base sample: 152)	74.8%	77%	80%	67%	73%	74%	↔	↔	+2%

3.1.15 Perceptions of value for money are virtually the same for metered and unmetered customers, as was the case in 2014. However, there are differences amongst metered customers; those who requested a meter are significantly more satisfied with the value for money of water services than those who are not metered through choice (82% compared to 73% with a compulsory meter and 73% who moved into a property which already had a meter).

3.1.16 The customers who are most dissatisfied (significantly more so) with the value for money of their water services are:

- People with disabilities (14%) or those with someone disabled in the household (12%) compared to customers with no disability (9%)
- Benefit recipients (12% compared with 9% not on any benefits)

3.1.17 Older age groups (60-74 and 75+) are the most satisfied with value for money compared to all younger age groups (18-29 72%, 30-44 70%, 45-59 72% vs. 60-74 81% and 75+ 85%).

3.1.18 In terms of the clusters, the ‘Very Satisfied’ segment are most satisfied with the value for money of their water service (94%), whilst less than a third of the ‘Dissatisfied’ and ‘Unfair’ clusters feel this way (23% and 34% respectively). True to their name the ‘Neutrals’ fall in between (69%).

3.2 Value for money of sewerage services

3.2.1 Over three-quarters (78%) of customers are satisfied with the value for money of their sewerage services, in line with 2014 (77%). Satisfaction levels have increased slightly year on year since 2012, culminating in an upward five-year trend.

3.2.2 The proportion of very satisfied customers has continued to increase year on year and is now at 38%, up from just over a quarter in previous years (34% in 2014, 26% in 2013 and 27% in 2012).

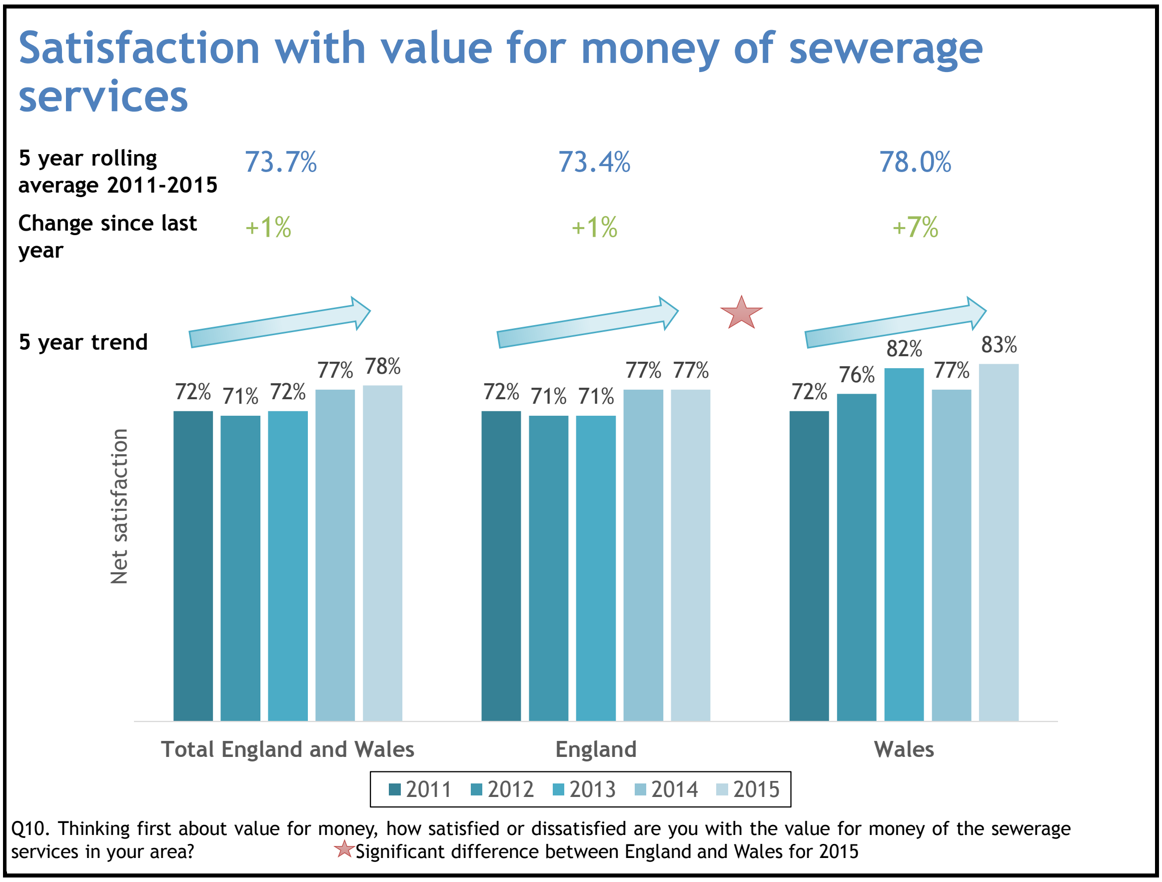
3.2.3 As in previous years and in line with water services, there is a strong link between satisfaction with sewerage services and value for money, with 95% of those satisfied with value for money also satisfied with their sewerage services overall. This is an increase on the figure reported in 2014 (92%).

3.2.4 Only 1 in 10 customers are dissatisfied with the value for money of their sewerage service (9%), almost the same as 2014 (10%).

3.2.5 The correlation between contact and perceptions of value for money seen for water is repeated for sewerage services. Dissatisfaction with value for money is much higher amongst those who have contacted their sewerage company than those who have not (13% compared to 8%). Dissatisfaction with contact is associated with very high levels of dissatisfaction with value for money (41% compared to 6% who were happy with their interaction).

3.2.6 Satisfaction with value for money of sewerage services is significantly higher in Wales, where satisfaction has increased by 7%; views in England are in line with 2014.

Figure 20: Satisfaction with value for money of sewerage services



3.2.7 Five WaSCs have an upward trend in satisfaction with value for money of sewerage services over the past five-years, namely: Anglian Water, Severn Trent Water, South West Water, United Utilities and Wessex Water. These companies have also seen an upward trend in satisfaction with value for money of water services.

3.2.8 The five-year rolling average for South West Water is 52%, which is significantly lower than the WaSC average of 74.1%, and continues to be the lowest for all WaSCs year on year. However, this year, satisfaction with South West Water has increased by 8% from 53% in 2014 to 61% in 2015, gradually closing the gap on Southern Water (69%).

3.2.9 Welsh Water and Yorkshire Water have the joint highest rating at 83% and they are also the highest rating WaSCs for value for money of water services.

Figure 21: Satisfaction with value for money of sewerage services - WaSCs

Satisfaction with value for money of sewerage services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	73.7%	72%	71%	72%	77%	78%	↑	n/a	n/a
Total WaSCs (2015 base sample: 3607)	74.1%	72%	72%	72%	77%	78%	↑	74.1%	n/a
Anglian Water (2015 base sample: 401)	74.3%	72%	69%	72%	76%	80%	↑	↔	+5%
Dŵr Cymru Welsh Water (2015 base sample: 402)	78.1%	72%	77%	83%	76%	83%	↔	↔	+7%
Northumbrian Water (2015 base sample: 201)	80.1%	84%	77%	80%	80%	79%	↔	↔	-1%
Severn Trent Water (2015 base sample: 500)	75.3%	68%	73%	74%	79%	79%	↑	↔	=
South West Water (2015 base sample: 401)	52.0%	39%	52%	54%	53%	61%	↑	↓	+8%
Southern Water (2015 base sample: 201)	71.1%	73%	68%	74%	72%	69%	↔	↔	-3%
Thames Water (2015 base sample: 200)	73.3%	73%	78%	67%	76%	76%	↔	↔	-1%
United Utilities (2015 base sample: 401)	73.9%	71%	67%	68%	78%	80%	↑	↔	+1%
Wessex Water (2015 base sample: 500)	76.1%	68%	75%	73%	79%	81%	↑	↔	+2%
Yorkshire Water (2015 base sample: 400)	78.6%	82%	70%	75%	82%	83%	↔	↔	+1%

3.2.10 Care should be taken when interpreting sewerage results for WoCs as customers could be rating different companies, e.g. Southern Water and Wessex Water provide sewerage services for Bournemouth Water.

3.2.11 Three WoCs show upward trends in satisfaction with value for money of sewerage services over the past five-years, namely: Bournemouth Water (services provided by Southern Water and Wessex Water), Dee Valley Water (Welsh Water or United Utilities) and South Staffordshire Water (Severn Trent Water).

3.2.12 Satisfaction with value for money for Bristol Water customers (services provided by Wessex Water) has increased significantly since 2014, whereas for Affinity Water East (Anglian Water or Thames Water), satisfaction has decreased significantly in the same period.

3.2.13 Average satisfaction with value for money of sewerage services for Hartlepool Water customers (Northumbrian Water) is significantly higher than the WoC average of 72.3% at 83.3%, and is the highest for all WoCs in 2015 at 86%. South Staffordshire Water (sewerage services provided by Severn Trent Water) is next at 83%, with year on year increases since 2012 when 66% of customers were satisfied. This is aligned with the five-year upward trend with satisfaction of water services. Affinity Water Southeast (Southern Water) has the lowest WoC rating in 2015 (67%).

Figure 22: Satisfaction with value for money of sewerage services – WoCs

Satisfaction with value for money of sewerage services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	73.7%	72%	71%	72%	77%	78%	↑	n/a	n/a
Total WoCs (2015 base sample: 2357)	72.3%	72%	69%	70%	75%	76%	↔	72.3%	n/a
Affinity Water Central (2015 base sample: 250)	72.0%	72%	70%	71%	75%	74%	↔	↔	-1%
Affinity Water East (2015 base sample: 200)	72.9%	75%	69%	70%	82%	70%	↔	↔	-12%
Affinity Water Southeast (2015 base sample: 200)	69.0%	74%	73%	58%	70%	67%	↔	↔	-3%
Bournemouth Water (2015 base sample: 350)	71.4%	69%	63%	67%	81%	76%	↑	↔	-5%
Bristol Water (2015 base sample: 150)	73.7%	78%	68%	76%	70%	81%	↔	↔	+11%
Cambridge Water (2015 base sample: 150)	74.3%	76%	74%	69%	77%	75%	↔	↔	-2%
Dee Valley Water (2015 base sample: 150)	74.7%	73%	69%	70%	83%	83%	↑	↔	=
Essex & Suffolk Water (2015 base sample: 150)	68.7%	69%	61%	71%	74%	70%	↔	↔	-4%
Hartlepool Water (2015 base sample: 154)	83.3%	80%	83%	82%	86%	86%	↔	↑	=
Portsmouth Water (2015 base sample: 151)	73.4%	73%	69%	78%	77%	73%	↔	↔	-4%
South East Water (2015 base sample: 149)	69.4%	69%	71%	63%	73%	78%	↔	↔	+5%
South Staffs Water (2015 base sample: 151)	73.8%	71%	66%	74%	80%	83%	↑	↔	+3%
Sutton & East Surrey Water (2015 base sample: 152)	74.1%	75%	78%	67%	73%	76%	↔	↔	+2%

3.2.14 Customers aged 60-74 and 75+ are most satisfied with the value for money of their sewerage services (83% and 88% respectively compared with 75% aged 18-29, 72% aged 30-44 and 74% 45-59).

3.2.15 Customers with disabilities or with someone disabled in the household (11% compared to 8% of non-disabled) are most dissatisfied with the value for money of their sewerage services. Also, customers who already had a meter in their household when they moved in or were compulsorily metered are more dissatisfied (10% and 12% respectively) than customers who have requested a meter (7%).

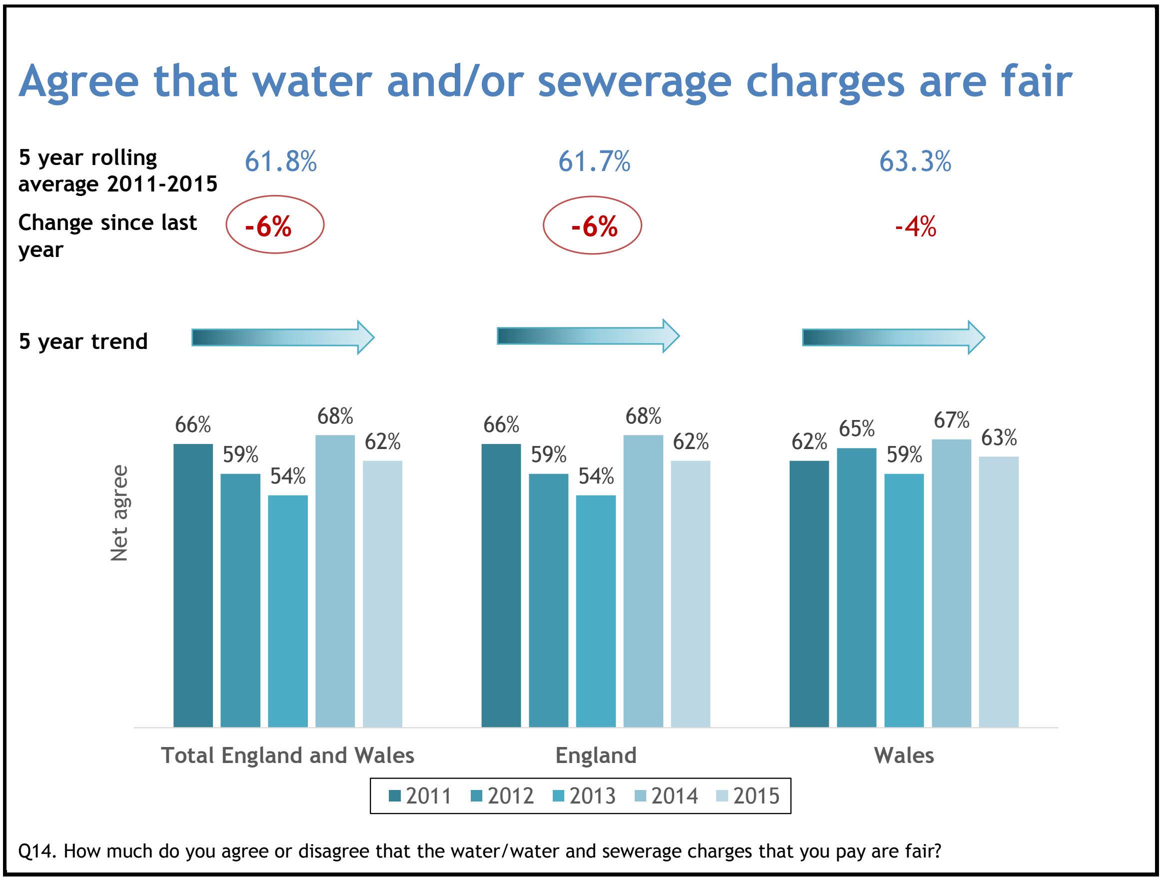
3.2.16 In terms of the clusters, 87% of the 'Very Satisfied' segment is satisfied with the value for money of their sewerage service compared to a third of the 'Dissatisfied' and 'Unfair' clusters (29% and 33% respectively). True to their name the 'Neutrals' fall in between (65%).

3.3 Fairness of water and sewerage charges

3.3.1 Over three-fifths (62%) agree that their charges are fair, which is a significant fall from 68% in 2014. This has been driven by an increase in neutrality i.e. customers falling into the neither agree nor disagree category, as the proportion who disagree at 17%, is unchanged from 2014.

3.3.2 Despite this, the five-year trend is stable and ratings are virtually the same in Wales as in England (63% and 62% respectively).

Figure 23: Agree that water and/or sewerage charges are fair



3.3.3 The average WaSC rating is 62% and ratings are highest for Yorkshire Water at 67% and lowest for South West Water at 39%, mirroring their rankings for satisfaction with value for money.

3.3.4 Northumbrian Water and Southern Water have seen significant decreases since 2014 (from 76% to 66% and from 68% to 53% respectively), yet interestingly neither company has seen decreases in satisfaction with value for money, so perceptions of fairness are being influenced by something else. Interestingly, in Southern Water's area, there is no significant difference in views on fairness between households which have been compulsorily metered, and those which opted for a meter or who moved into a property which was already metered.

3.3.5 The five-year trend is stable for all companies. However, the five-year rolling average for South West Water (36.7%) is significantly lower than the WaSC average of 61.7%.

Figure 24: Agree that water and/or sewerage charges are fair - WaSCs

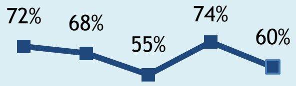
Agree charges are fair	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	61.8%	66%	59%	54%	68%	62%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	61.7%	66%	59%	54%	68%	62%	↔	61.7%	n/a
Anglian Water (2015 base sample: 401)	62.6%	64%	57%	54%	68%	64%	↔	↔	-4%
Dŵr Cymru Welsh Water (2015 base sample: 402)	63.6%	62%	65%	59%	67%	63%	↔	↔	-4%
Northumbrian Water (2015 base sample: 201)	68.1%	76%	64%	63%	76%	66%	↔	↔	-10%
Severn Trent Water (2015 base sample: 500)	63.4%	66%	58%	59%	69%	64%	↔	↔	-5%
South West Water (2015 base sample: 401)	36.7%	31%	43%	29%	46%	39%	↔	↓	-7%
Southern Water (2015 base sample: 201)	61.2%	66%	60%	57%	68%	53%	↔	↔	-15%
Thames Water (2015 base sample: 200)	61.3%	66%	65%	53%	67%	60%	↔	↔	-7%
United Utilities (2015 base sample: 401)	61.0%	66%	54%	48%	68%	62%	↔	↔	-6%
Wessex Water (2015 base sample: 500)	64.2%	59%	71%	57%	69%	65%	↔	↔	-4%
Yorkshire Water (2015 base sample: 400)	65.8%	75%	59%	59%	71%	67%	↔	↔	-4%

3.3.6 The average WoC rating for 2015 is the same as for WaSCs at 62%. The highest rated WoC is South Staffordshire Water (75%), whilst the lowest is 57% for both Affinity Water Southeast and Affinity Water Central.

3.3.7 There have been significant falls in agreement since 2014 for Bournemouth Water (from 79% to 61%) and Sutton & East Surrey Water (from 74% to 60%). The five-year trend is stable for all WoCs.

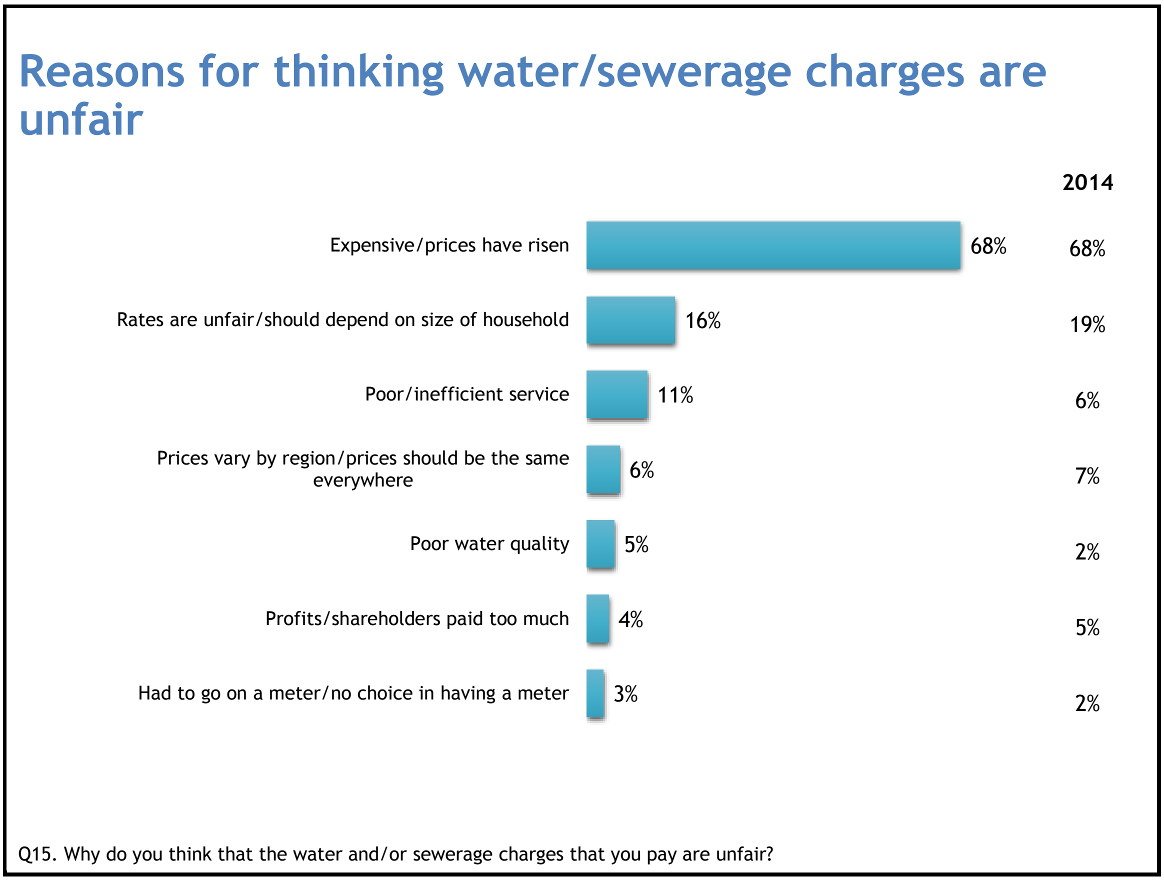
Figure 25: Agree that water and/or sewerage charges are fair - WoCs

Agree charges are fair	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	61.8%	66%	59%	54%	68%	62%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	61.9%	68%	60%	54%	67%	62%	↔	61.9%	n/a
Affinity Water Central (2015 base sample: 250)	57.5%	62%	54%	53%	62%	57%	↔	↔	-5%
Affinity Water East (2015 base sample: 200)	63.3%	71%	59%	56%	70%	61%	↔	↔	-9%
Affinity Water Southeast (2015 base sample: 200)	61.7%	69%	66%	47%	66%	57%	↔	↔	-8%
Bournemouth Water (2015 base sample: 350)	65.7%	71%	63%	61%	79%	61%	↔	↔	**-18%**
Bristol Water (2015 base sample: 150)	59.8%	64%	61%	51%	64%	59%	↔	↔	-5%
Cambridge Water (2015 base sample: 150)	67.2%	69%	70%	56%	72%	67%	↔	↔	-5%
Dee Valley Water (2015 base sample: 150)	66.1%	71%	66%	56%	70%	66%	↔	↔	-4%
Essex & Suffolk Water (2015 base sample: 150)	60.9%	73%	55%	58%	63%	58%	↔	↔	-5%
Hartlepool Water (2015 base sample: 154)	73.0%	77%	66%	66%	83%	74%	↔	↔	-9%
Portsmouth Water (2015 base sample: 151)	68.5%	73%	65%	61%	75%	69%	↔	↔	-6%
South East Water (2015 base sample: 149)	59.9%	69%	60%	50%	66%	64%	↔	↔	-2%
South Staffs Water (2015 base sample: 151)	65.8%	67%	66%	51%	71%	75%	↔	↔	+3%

Sutton & East Surrey Water (2015 base sample: 152)	66.1%	 72% 68% 55% 74% 60%	↔	↔	-15%

3.3.8 Over two-thirds (68%) of customers who think that the water/sewerage charges they pay are unfair say it is because the charges are expensive/prices have risen.

Figure 26: Reason why charges are unfair

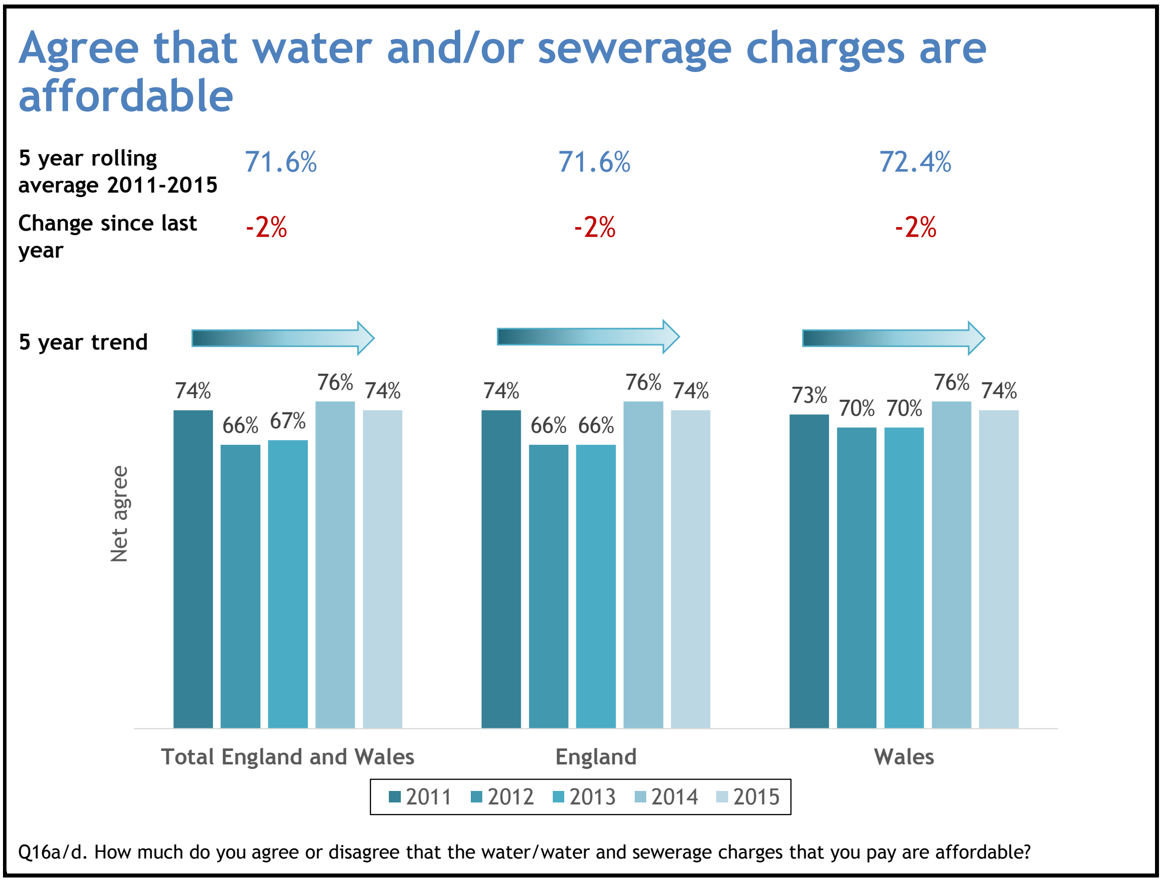


3.4 Affordability of water and sewerage charges

3.4.1 Three quarters (74%) of all customers agree that water and sewerage charges are affordable to them, a similar proportion to 2014 (76%).

3.4.2 As was the case with fairness of water and sewerage charges, the five-year trend is stable and there are no differences between England and Wales (74%).

Figure 27: Agree that water and/or sewerage charges are affordable



3.4.3 The five-year rolling average for South West Water of 54.9% is significantly lower than the collective WaSC average of 71.2%. Although South West Water is still the lowest rating WaSC in 2015, the score achieved in 2015 is at its highest level for five years at 61%. The highest WaSC rating is for Wessex Water at 80%.

3.4.4 Significant decreases have been witnessed this year for Northumbrian Water (from 84% in 2014 to 74% this year) and Southern Water (from 79% to 68%). These same two companies are also the only ones to have significant decreases in the perceived fairness of charges.

3.4.5 Severn Trent Water is the only WaSC to have an upward five-year trend for affordability of water and sewerage charges.

Figure 28: Agree that water and/or sewerage charges are affordable – WaSCs

Agree charges are affordable	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	71.6%	74%	66%	67%	76%	74%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	71.2%	74%	66%	66%	76%	74%	↔	71.2%	n/a
Anglian Water (2015 base sample: 401)	73.0%	72%	65%	67%	78%	78%	↔	↔	=
Dŵr Cymru Welsh Water (2015 base sample: 402)	72.7%	73%	70%	70%	75%	73%	↔	↔	-2%
Northumbrian Water (2015 base sample: 201)	76.4%	83%	73%	71%	84%	74%	↔	↔	-10%
Severn Trent Water (2015 base sample: 500)	71.9%	71%	64%	70%	74%	77%	↑	↔	2%
South West Water (2015 base sample: 401)	54.9%	52%	56%	48%	58%	61%	↔	↓	3%
Southern Water (2015 base sample: 201)	70.3%	73%	64%	69%	79%	68%	↔	↔	-11%
Thames Water (2015 base sample: 200)	68.6%	74%	69%	64%	72%	67%	↔	↔	-5%
United Utilities (2015 base sample: 401)	71.9%	72%	65%	62%	78%	76%	↔	↔	-3%
Wessex Water (2015 base sample: 500)	75.4%	71%	78%	66%	80%	80%	↔	↔	=
Yorkshire Water (2015 base sample: 400)	76.1%	87%	65%	70%	80%	79%	↔	↔	=

3.4.6 There is a three-year upward trend for WoCs as a whole for agreement that combined water and sewerage charges are affordable. This is being driven by four companies: Affinity Water Southeast, South East Water, South Staffs Water and Affinity Water Central.

3.4.7 The 2015 WoC average rating is 77%, with South Staffordshire Water the highest at 85% and the lowest for Affinity Water East at 72%.

3.4.8 There have been significant falls in perceived affordability for Bournemouth Water (from 89% to 75% in 2015) and Sutton & East Surrey Water (from 86% to 76%). The two companies are the only ones to have also experienced significant falls in perceptions of the fairness of charges.

Figure 29: Agree that water and/or sewerage charges are affordable – WoCs

Agree charges are affordable	3[6]/5 year rolling company average	Five year company trend 2011	2012	2013	2014	2015	3/5 year company trend	Company average vs WoC average	Company change since last year
Industry (2015 base sample: 5964)	71.6%	74%	66%	67%	76%	74%	↔		
Total WoCs (2015 base sample: 2357)	74.4%			69%	77%	77%	↑	74.4%	
Affinity Water Central (2015 base sample: 250)	71.8%			66%	72%	76%	↑	↔	+4%
Affinity Water East (2015 base sample: 200)	71.4%			64%	78%	72%	↔	↔	-6%
Affinity Water Southeast (2015 base sample: 200)	70.0%			59%	76%	73%	↑	↔	-3%
Bournemouth Water (2015 base sample: 350)	77.0%			69%	89%	75%	↔	↔	-13%
Bristol Water (2015 base sample: 150)	71.5%			67%	74%	74%	↔	↔	=
Cambridge Water (2015 base sample: 150)	80.1%			80%	81%	79%	↔	↔	-1%
Dee Valley Water (2015 base sample: 150)	75.5%			70%	79%	79%	↔	↔	=
Essex & Suffolk Water (2015 base sample: 150)	74.3%			73%	78%	73%	↔	↔	-5%
Hartlepool Water (2015 base sample: 154)	81.5%			77%	86%	82%	↔	↔	-5%
Portsmouth Water (2015 base sample: 151)	78.9%			78%	77%	82%	↔	↔	+4%
South East Water (2015 base sample: 149)	72.1%			67%	80%	78%	↑	↔	-2%
South Staffs Water (2015 base sample: 151)	76.9%			67%	79%	85%	↑	↔	+7%
Sutton & East Surrey Water (2015 base sample: 152)	78.6%			73%	86%	76%	↔	↔	-9%

[6] Data for WoCs on the perceived affordability of water and sewerage charges i.e. the total bill is only available from 2013. Prior to 2013 WoC customers were only asked to assess the affordability of water and sewerage services separately as they are charged by different companies.

3.4.9 WoC customers are also asked to rate the affordability of their water charges separately to their sewerage charges - the results are broadly the same as for their assessment of combined charges.

3.4.10 As was seen with the combined question, Bournemouth Water has seen a significant decrease since 2014 (from 88% to 77%) but they are the only company to do so.

3.4.11 The 2015 WoC average rating is 77%, with South Staffordshire Water the highest at 85% and the lowest for Affinity Water East at 72%.

Figure 30: Agree that water charges are affordable – WoCs

Agree water charges are affordable	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	75.1%	78%	71%	69%	78%	79%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	74.4%	78%	71%	69%	78%	79%	↔	74.4%	n/a
Affinity Water Central (2015 base sample: 250)	72.1%	77%	67%	63%	73%	78%	↔	↔	+5%
Affinity Water East (2015 base sample: 200)	72.2%	77%	65%	65%	81%	73%	↔	↔	-7%
Affinity Water Southeast (2015 base sample: 200)	74.9%	79%	75%	64%	78%	77%	↔	↔	-1%
Bournemouth Water (2015 base sample: 350)	78.1%	82%	73%	73%	88%	77%	↔	↔	**-11%**
Bristol Water (2015 base sample: 150)	73.5%	75%	74%	68%	76%	77%	↔	↔	+1%
Cambridge Water (2015 base sample: 150)	82.5%	85%	83%	79%	82%	82%	↔	↔	-1%
Dee Valley Water (2015 base sample: 150)	76.5%	75%	76%	72%	80%	80%	↔	↔	=
Essex & Suffolk Water (2015 base sample: 150)	74.4%	78%	70%	73%	78%	75%	↔	↔	-2%
Hartlepool Water (2015 base sample: 154)	80.7%	83%	73%	79%	87%	85%	↔	↔	-2%
Portsmouth Water (2015 base sample: 151)	80.3%	83%	72%	83%	81%	85%	↔	↔	+3%
South East Water (2015 base sample: 149)	74.9%	80%	71%	71%	79%	79%	↔	↔	+1%
South Staffs Water (2015 base sample: 151)	77.0%	76%	77%	70%	78%	85%	↔	↔	+8%
Sutton & East Surrey Water (2015 base sample: 152)	74.6%	73%	73%	67%	85%	77%	↔	↔	-8%

3.4.12 The customer groups below are significantly more likely to agree their bill is affordable. These groups are, in most cases, the same as in 2014:

- Metered customers: 77% compared to 72% of unmetered. Particularly those who requested a meter (81%) compared to those who already had a meter when they moved in (76%) or were compulsorily metered (73%).
- Older customers: 78% of 60-74s and 79% of 75+ compared to 74% of 18-29s, 73% of 30-44s and 71% of 45-59s.
- Disability: respondents who don't have a disability (77%), compared with those who have a disability (64%) or someone else in the household has one (68%).
- Household benefits: 66% of those receiving benefits compared with 78% not receiving benefits.

4 Consumer rights and responsibilities

Water companies are obliged to provide certain services for low income and vulnerable groups in society. Customers also have the right to request a water meter. This chapter examines customers' awareness and views on these services.

Key five-year trends

- In England and Wales, awareness of WaterSure/Welsh Water Assist has fluctuated over the last five years, giving an overall stable five-year trend. However, the trend for Wales is upward with awareness in 2015 at its highest for five years.
- There has also been an upward trend in awareness of a water company's services for special assistance customers.
- Awareness that water meters can be fitted free of charge and trialled for a period of 12 (or 24)[7] months is stable, with the exception of Wales, where awareness of the trial period for water meters has fallen.
- In England and Wales, awareness of the Guaranteed Standards Scheme (GSS) compensation scheme for failure to meet service standards has been stable over five years, but has increased in Wales.
- Whilst the trend for awareness of the rainwater drainage rebate is stable for the three years it has been measured.
- The proportion of customers likely to contact their water company if they are worried about their bill is stable across five years at an overall level and for England. However, in Wales, there has been a downward trend.
- The five-year trend for the proportion of customers who have contacted their water company is also stable, whilst overall satisfaction with contact has increased over the past five years.

Key changes since 2014

- There has been little change for most measures since 2014, the exceptions being:
  - The proportion of customers aware of the Guaranteed Standards Scheme (GSS) has increased significantly from 42% to 50%.
  - Awareness that water meters can be fitted free of charge has increased significantly since 2014 (from 60% to 67%), reversing the significant decrease witnessed from 2013 to 2014.

4.1 WaterSure/Welsh Water Assist

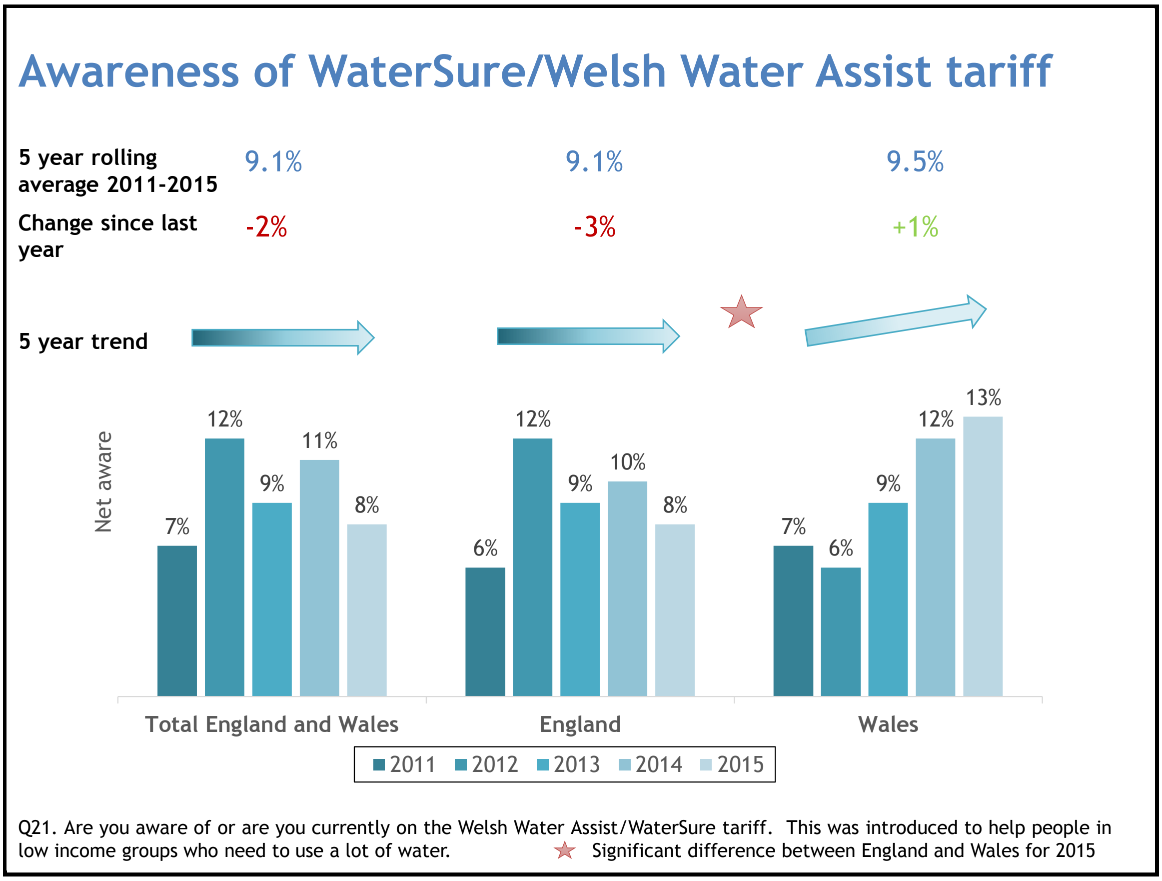
4.1.1 Fewer than one in ten customers (8%) are aware of the WaterSure/Welsh Water Assist schemes which aim to help people with low incomes that need to use a lot of water. This is slightly lower than 2014's figure of 11%.

4.1.2 The proportion unaware of the schemes but who would like to know more has remained stable since 2014 at 9%.

[7] Companies which offer a free meter option scheme have different policies for how long consumers can trial a water meter before deciding whether they want to remain on the metered charge or change back to rateable value billing.

4.1.3 In 2015, significantly more customers are aware of Welsh Water Assist/WaterSure in Wales (13%) than are aware of WaterSure in England (8%). This is reflected in the upward awareness trend in Wales over the past five years.

Figure 31: Awareness of WaterSure/Welsh Water Assist tariff



4.1.4 At WaSC level, average awareness is 9%, and continues to be highest among South West Water customers (17%) and lowest amongst Yorkshire Water customers (5%).

4.1.5 The five-year rolling average amongst South West Water customers is significantly higher than the WaSC average (19.5% compared with 9.2%).

4.1.6 There is a five-year upward trend for Welsh Water.

Figure 32: Awareness of WaterSure/Welsh Water Assist – WaSCs

Awareness of WaterSure/Welsh Water Assist	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	9.1%	7%	12%	9%	11%	8%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	9.2%	7%	11%	9%	11%	9%	↔	9.2%	n/a
Anglian Water (2015 base sample: 401)	11.4%	9%	10%	14%	11%	13%	↔	↔	+1%
Dŵr Cymru Welsh Water (2015 base sample: 402)	10.0%	7%	6%	9%	13%	13%	↑	↔	=
Northumbrian Water (2015 base sample: 201)	7.1%	4%	4%	9%	11%	9%	↔	↔	-2%
Severn Trent Water (2015 base sample: 500)	7.0%	6%	7%	6%	9%	7%	↔	↔	-1%
South West Water (2015 base sample: 401)	19.5%	19%	25%	19%	18%	17%	↔	↑	-1%
Southern Water (2015 base sample: 201)	16.1%	8%	36%	14%	12%	10%	↔	↔	-2%
Thames Water (2015 base sample: 200)	9.3%	5%	23%	5%	10%	8%	↔	↔	-2%
United Utilities (2015 base sample: 401)	7.6%	6%	5%	9%	11%	7%	↔	↔	-4%
Wessex Water (2015 base sample: 500)	10.2%	7%	18%	11%	11%	6%	↔	↔	-6%
Yorkshire Water (2015 base sample: 400)	7.2%	5%	5%	9%	10%	5%	↔	↔	-4%

4.1.7 The 2015 WoC average is 6%, with highest awareness for Affinity Water East customers (16%) and lowest for South East Water customers (2%).

4.1.8 The rolling five-year average awareness score for Affinity Water East at 17.7% is significantly higher than the WoC average of 8.7%.

Figure 33: Awareness of WaterSure - WoCs

Awareness of WaterSure/ Welsh Water Assist	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	9.1%	7%	12%	9%	11%	8%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	8.7%	6%	13%	9%	10%	6%	↔	8.7%	n/a
Affinity Water Central (2015 base sample: 250)	5.8%	5%	6%	7%	8%	5%	↔	↔	-4%
Affinity Water East (2015 base sample: 200)	17.7%	17%	16%	22%	18%	16%	↔	↑	-2%
Affinity Water Southeast (2015 base sample: 200)	13.2%	11%	13%	14%	16%	13%	↔	↔	-3%
Bournemouth Water (2015 base sample: 350)	9.6%	7%	10%	8%	9%	12%	↔	↔	+3%
Bristol Water (2015 base sample: 150)	9.6%	4%	15%	9%	11%	8%	↔	↔	-3%
Cambridge Water (2015 base sample: 150)	7.8%	9%	3%	10%	9%	9%	↔	↔	=
Dee Valley Water (2015 base sample: 150)	9.4%	9%	8%	11%	7%	14%	↔	↔	+7%
Essex & Suffolk Water (2015 base sample: 150)	10.8%	8%	12%	14%	10%	7%	↔	↔	-3%
Hartlepool Water (2015 base sample: 154)	7.5%	4%	8%	10%	10%	6%	↔	↔	-4%
Portsmouth Water (2015 base sample: 151)	8.8%	5%	19%	6%	7%	6%	↔	↔	-2%
South East Water (2015 base sample: 149)	10.1%	7%	25%	8%	11%	2%	↔	↔	-9%
South Staffs Water (2015 base sample: 151)	7.0%	5%	8%	9%	11%	3%	↔	↔	-8%
Sutton & East Surrey Water (2015 base sample: 152)	11.4%	3%	22%	8%	14%	12%	↔	↔	-2%

4.1.9 Customers who are currently unaware of the scheme but are keen to learn more about it are most likely to come from the harder to reach/more vulnerable sections of society, namely:

- Unemployed/students (14%) compared to employed respondents (8%).
- Households with a member who is disabled or experiencing long term illness (15% compared to 7% of those without).
- Households receiving benefits (17% compared to 6% of those not).

4.1.10 Awareness of, or subscription to other schemes which reduce water bills for customers who struggle to afford them, has remained low and stable since 2014 at 4%. The schemes with highest awareness are South West Water's Helping Hands Scheme with 3%, and Affinity Water Southeast's Li£t scheme at 2%; any other schemes mentioned had 1% awareness.

4.2 Special assistance services

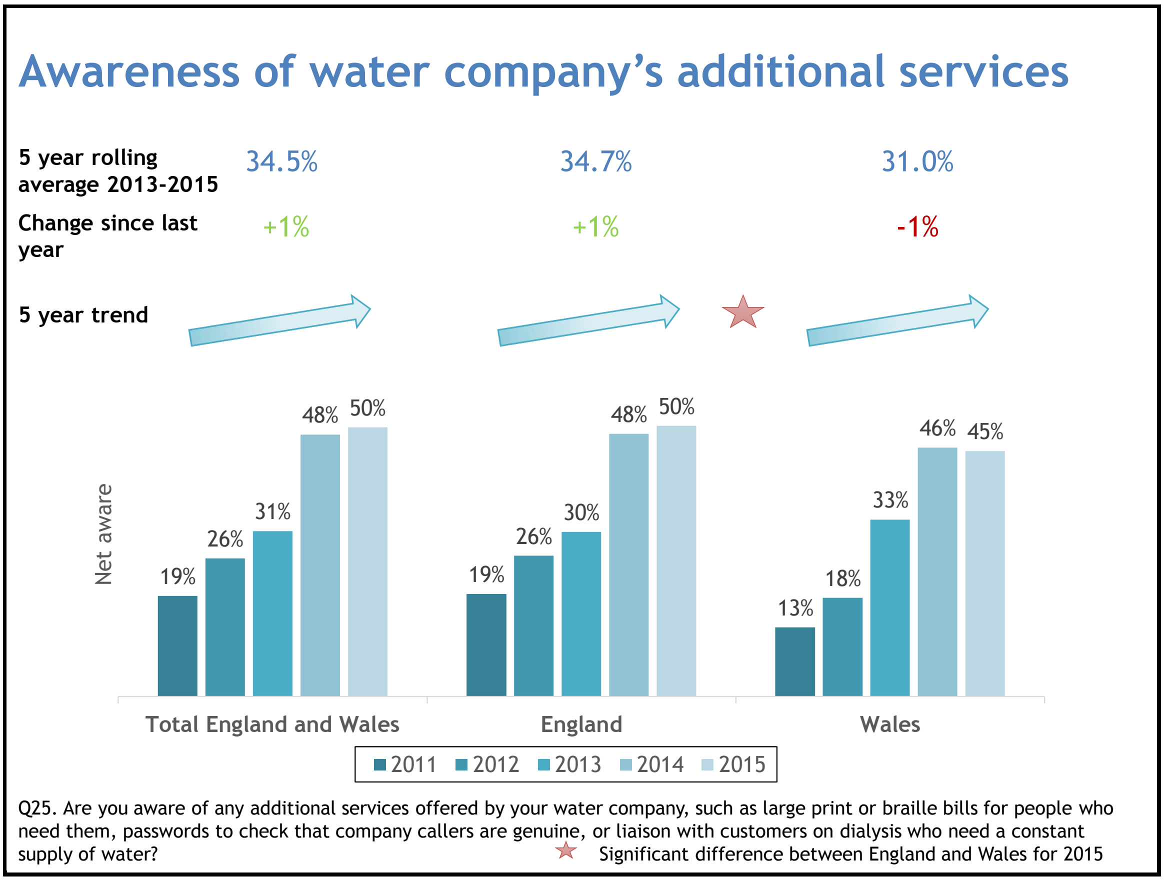
4.2.1 The wording of this question was altered slightly in 2014 from previous years. Examples of the type of services available were given in the question, but there was no specific reference relating these services to the "elderly" or "disabled" as some of them, such as password schemes for visiting company representatives, are available to all customers when requested. Therefore, caution needs to be taken when making direct comparisons before 2014. Results have remained stable this year with 50% aware. Only 2% of respondents would like to know more.

4.2.2 Metered households are more likely to be aware than unmetered (52% and 48% respectively).

4.2.3 Although there has been a five-year upward trend, this may be an effect of the change in wording in 2014.

4.2.4 Significantly fewer customers in Wales are aware of additional services (45%) compared to England (50%).

Figure 34: Awareness of water company's additional services



4.2.5 The five-year average awareness score for all WaSCs is 34.3%. South West Water's five-year rolling average of 43.5% is significantly higher than the WaSC average and the company has the highest score in 2015 (59%). Thames Water has the lowest score at 41%.

4.2.6 Upward trends have been recorded for all individual WaSCs over five years, but the greatest increase from 2014 to 2015 is a significant one of +7% (for Northumbrian Water).

Figure 35: Awareness of water company's additional services - WaSCs

Awareness of water company's additional services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	34.5%	19%	26%	31%	48%	50%	↑	n/a	n/a
Total WaSCs (2015 base sample: 3607)	34.3%	19%	26%	30%	48%	49%	↑	34.3%	n/a
Anglian Water (2015 base sample: 401)	38.0%	20%	32%	34%	51%	54%	↑	↔	+3%
Dŵr Cymru Welsh Water (2015 base sample: 402)	30.9%	12%	18%	33%	46%	45%	↑	↔	-1%
Northumbrian Water (2015 base sample: 201)	33.1%	16%	26%	31%	43%	50%	↑	↔	+7%
Severn Trent Water (2015 base sample: 500)	34.2%	22%	25%	26%	47%	51%	↑	↔	+5%
South West Water (2015 base sample: 401)	43.5%	24%	35%	42%	58%	59%	↑	↑	+2%
Southern Water (2015 base sample: 201)	38.3%	20%	34%	35%	51%	52%	↑	↔	+1%
Thames Water (2015 base sample: 200)	30.6%	16%	27%	27%	43%	41%	↑	↔	-3%
United Utilities (2015 base sample: 401)	34.1%	19%	22%	27%	52%	51%	↑	↔	-1%
Wessex Water (2015 base sample: 500)	36.9%	15%	23%	38%	52%	57%	↑	↔	+5%
Yorkshire Water (2015 base sample: 400)	34.5%	20%	26%	32%	48%	47%	↑	↔	-1%

4.2.8 Average awareness for all WoCs in 2015 is 35.2%. Awareness is highest amongst Cambridge Water customers (59%) and lowest for Sutton & East Surrey Water customers (46%).

4.2.9 Once again, upward trends have been recorded for all individual WoCs over five years. There have been no significant changes from 2014 to 2015.

Figure 36: Awareness of water company's additional services - WoCs

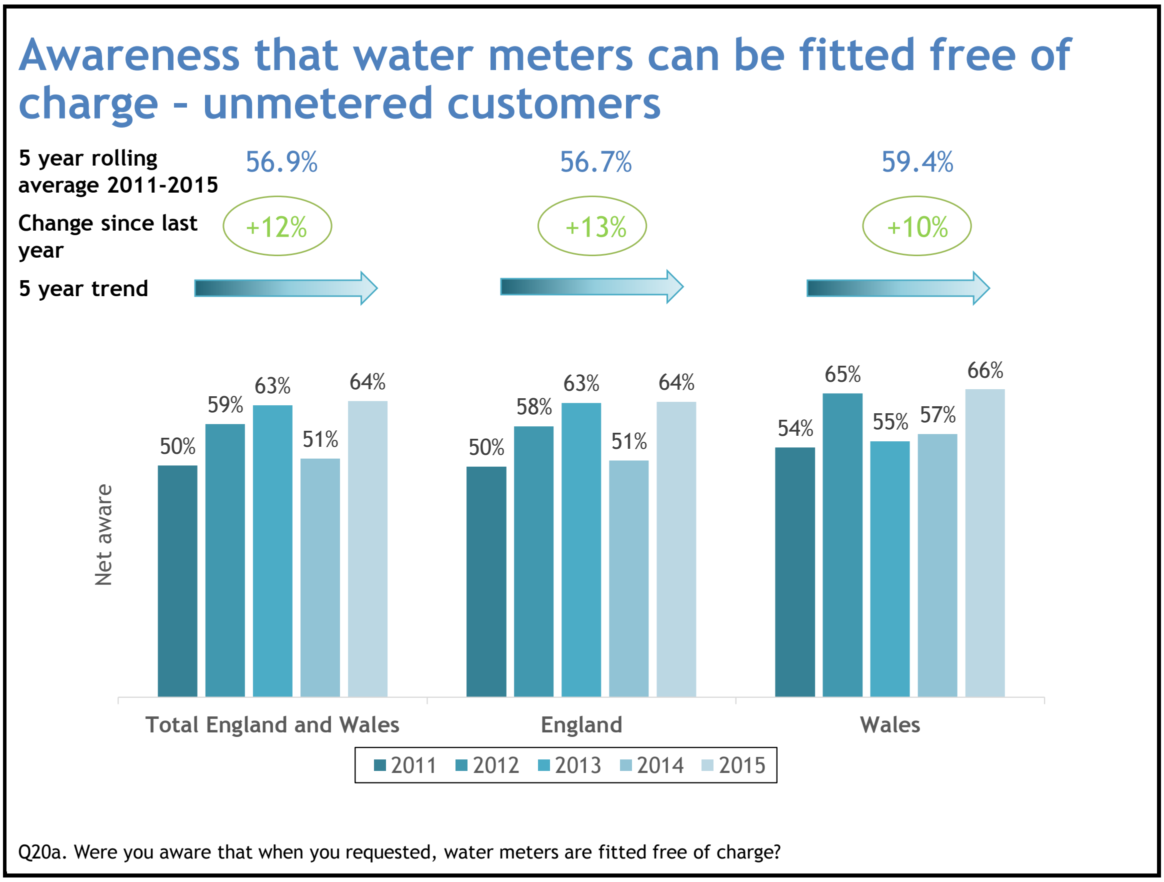
Awareness of water company's additional services	5 year rolling company average	Five year company trend 2011	2012	2013	2014	2015	5 year company trend	Company average vs WoC average	Company change since last year
Industry (2015 base sample: 5964)	34.5%	19%	26%	31%	48%	50%	↑	n/a	n/a
Total WoCs (2015 base sample: 2357)	35.2%	18%	23%	32%	50%	52%	↑	35.2%	n/a
Affinity Water Central (2015 base sample: 250)	31.8%	16%	21%	33%	41%	48%	↑	↔	+7%
Affinity Water East (2015 base sample: 200)	39.8%	26%	32%	38%	51%	53%	↑	↔	+2%
Affinity Water Southeast (2015 base sample: 200)	37.2%	23%	21%	33%	56%	54%	↑	↔	-2%
Bournemouth Water (2015 base sample: 350)	37.8%	21%	23%	39%	48%	57%	↑	↔	+9%
Bristol Water (2015 base sample: 150)	37.5%	17%	24%	38%	55%	53%	↑	↔	-2%
Cambridge Water (2015 base sample: 150)	39.4%	29%	24%	35%	50%	59%	↑	↔	+8%
Dee Valley Water (2015 base sample: 150)	32.9%	23%	17%	28%	47%	50%	↑	↔	+3%
Essex & Suffolk Water (2015 base sample: 150)	37.6%	23%	30%	31%	50%	54%	↑	↔	+4%
Hartlepool Water (2015 base sample: 154)	36.6%	24%	23%	36%	47%	53%	↑	↔	+5%
Portsmouth Water (2015 base sample: 151)	35.9%	19%	21%	35%	49%	54%	↑	↔	+5%
South East Water (2015 base sample: 149)	36.5%	16%	25%	30%	59%	52%	↑	↔	-7%
South Staffs Water (2015 base sample: 151)	34.2%	16%	19%	33%	48%	56%	↑	↔	+7%
Sutton & East Surrey Water (2015 base sample: 152)	31.7%	17%	21%	23%	51%	46%	↑	↔	-5%

4.3 Requesting a meter - unmetered customers

4.3.1 Two-thirds of unmetered customers (64%) know that meters can be fitted free of charge on request, which is a significant increase since 2014 (51%).

4.3.2 The five-year trend is stable once the significant changes from 2013 to 2014 (decrease) and 2014 to 2015 (increase) are smoothed out.

Figure 37: Awareness that water meters can be fitted free of charge



4.3.3 The 2015 WaSC average for awareness that water meters are fitted free of charge is 63%, with highest awareness for South West Water customers (86%) and lowest for Thames Water (57%)[8].

4.3.4 There is an upward five-year trend for Anglian Water and South West Water.

4.3.5 There have been significant increases in awareness for six WaSCs since 2014, namely Welsh Water, Northumbrian Water, Severn Trent Water, South West Water, Thames Water and Yorkshire Water.

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[8] Please note that all Southern Water and some Thames Water customers have been excluded from this question because of the companies' compulsory metering programmes.

Figure 38: Awareness that water meters can be fitted free of charge – WaSCs

Awareness that water meters can be fitted free of charge	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	56.9%	50%	59%	63%	51%	64%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	56.5%	50%	58%	62%	51%	63%	↔	56.5%	n/a
Anglian Water (2015 base sample: 401)	66.1%	54%	65%	72%	73%	71%	↑	↔	-2%
Dŵr Cymru Welsh Water (2015 base sample: 402)	59.3%	53%	66%	54%	57%	67%	↔	↔	+10%
Northumbrian Water (2015 base sample: 201)	52.5%	44%	57%	61%	42%	60%	↔	↔	+17%
Severn Trent Water (2015 base sample: 500)	55.9%	51%	60%	58%	46%	64%	↔	↔	+17%
South West Water (2015 base sample: 401)	77.1%	69%	72%	88%	75%	86%	↑	↔	+11%
Thames Water (2015 base sample: 200)	51.1%	48%	49%	61%	40%	57%	↔	↔	+17%
United Utilities (2015 base sample: 401)	59.0%	48%	59%	67%	57%	66%	↔	↔	+9%
Wessex Water (2015 base sample: 500)	59.9%	50%	63%	67%	59%	65%	↔	↔	+6%
Yorkshire Water (2015 base sample: 400)	53.5%	47%	55%	55%	51%	61%	↔	↔	+10%

4.3.6 The 2015 WoC average is 65%, with highest awareness for Essex & Suffolk Water (75%) and lowest for Affinity Water Central (59%)[9].

4.3.7 There is an upward five-year trend for Essex & Suffolk Water and a downward five-year trend for Affinity Water East.

4.3.8 Awareness for six WoCs has increased significantly since 2014, namely Bournemouth Water, Bristol Water, Cambridge Water, Essex & Suffolk Water, Portsmouth Water and South Staffordshire Water.

[9] Please note that all Affinity Water Southeast and some South East Water and Affinity Water Central customers are excluded from this question because of the companies' compulsory metering programmes.

Figure 39: Awareness that water meters can be fitted free of charge - WoCs

Awareness that water meters can be fitted free of charge	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	56.9%	50%	59%	63%	51%	64%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	58.5%	50%	63%	67%	52%	65%	↔	58.5%	n/a
Affinity Water Central (2015 base sample: 250)	56.4%	45%	64%	69%	50%	59%	↔	↔	+9%
Affinity Water East (2015 base sample: 200)	64.7%	67%	61%	76%	60%	62%	↓	↔	+2%
Bournemouth Water (2015 base sample: 350)	64.3%	61%	74%	74%	49%	68%	↔	↔	**+20%**
Bristol Water (2015 base sample: 150)	62.1%	48%	67%	70%	58%	72%	↔	↔	**+14%**
Cambridge Water (2015 base sample: 150)	57.9%	55%	54%	59%	53%	69%	↔	↔	**+16%**
Dee Valley Water (2015 base sample: 150)	63.0%	65%	59%	70%	56%	64%	↔	↔	+8%
Essex & Suffolk Water (2015 base sample: 150)	64.8%	52%	67%	70%	63%	75%	↑	↔	**+12%**
Hartlepool Water (2015 base sample: 154)	54.8%	50%	46%	62%	52%	64%	↔	↔	+12%
Portsmouth Water (2015 base sample: 151)	52.1%	48%	46%	62%	44%	63%	↔	↔	**+18%**
South East Water (2015 base sample: 149)[10]	60.6%	59%		70%	53%	65%	↔	↔	+12%
South Staffs Water (2015 base sample: 151)	55.4%	46%	64%	63%	43%	62%	↔	↔	**+19%**
Sutton & East Surrey Water (2015 base sample: 152)	56.7%	50%	57%	62%	54%	61%	↔	↔	+7%

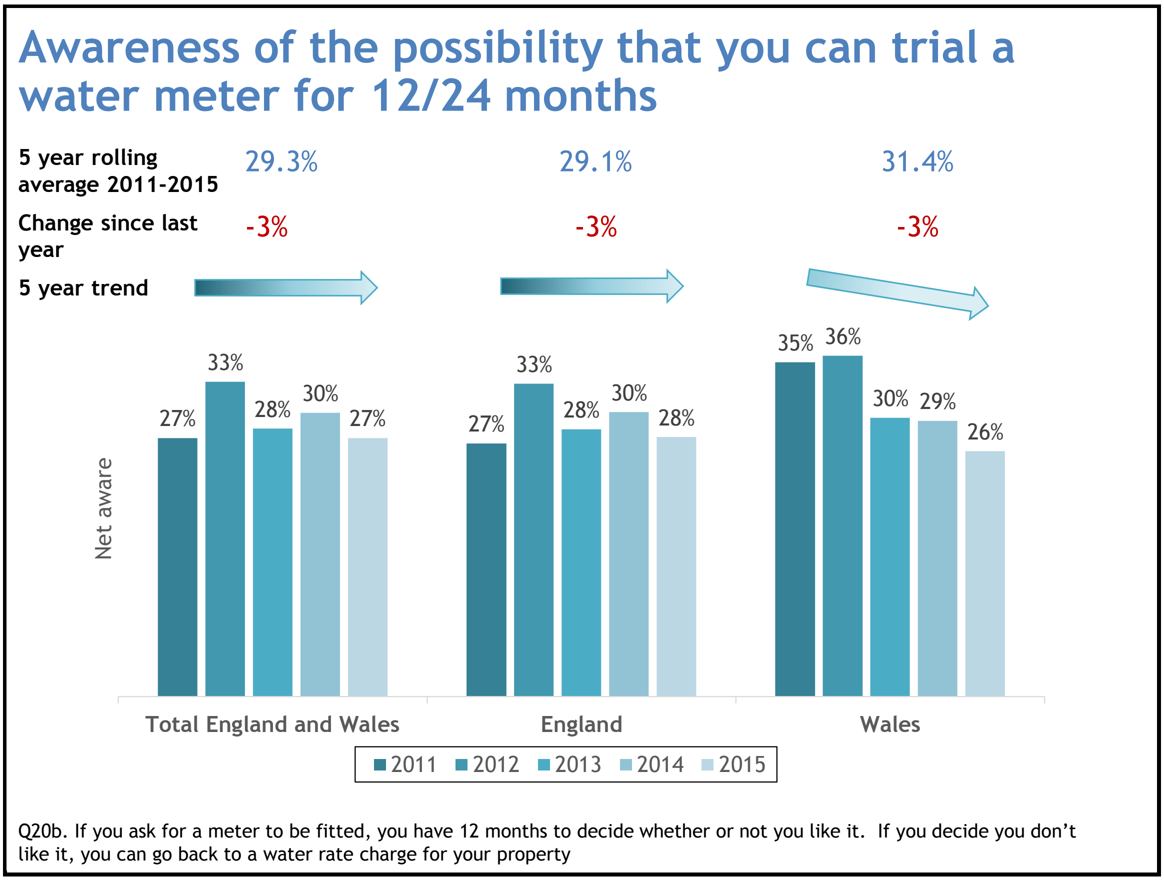
4.3.9 Far fewer customers are aware that, should they request a water meter, they have a 12 or 24[11] month trial period, than are aware that water meters can be fitted free of charge.

[10] Question not asked for South East Water in 2012

4.3.10 For unmetered customers, awareness of the trial period is also lower than awareness of the free meter option, and at 27% is virtually the same as the past 2 years.

4.3.11 There is a downward five-year trend for awareness of the trial scheme in Wales.

Figure 40: Awareness of the possibility that you can trial a water meter for 12/24 months



4.3.12 The 2015 WaSC average is 28%. South West Water has the highest awareness (48%), whereas Severn Trent Water has the lowest (23%)[12].

4.3.13 Since 2014 there has been a significant fall in awareness of Anglian Water customers. This may be because they changed the trial period from 12 to 24 months in the last year and this could have affected awareness. However, there are other companies, namely Northumbrian Water and United Utilities, who have also changed their policy without the same impact.

4.3.14 There are downward five-year trends for Welsh Water and Severn Trent Water.

4.3.15 The five-year rolling averages for Anglian Water (39.8%) and South West Water (47.5%) are significantly higher than the collective WaSC average (29.3%).

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[11] Different companies have different policies as to how long consumers have to decide, after having a meter fitted, whether they want to remain on a metered rate or to revert back to rateable value billing.
[12] Please note that all Southern Water and some Thames Water customers have been excluded from this question because of the companies' compulsory metering programmes.

Figure 41: Awareness of the possibility that you can trial a water meter for 12/24 months - WaSCs

Awareness of the 12/24 month trial period for a water meter	5 year rolling company average	Five year company trend 2011	2012	2013	2014	2015	5 year company trend	Company average vs WaSC average	Company change since last year
Industry (2015 base sample: 5964)	29.3%	27%	33%	28%	30%	27%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	29.3%	28%	33%	28%	30%	28%	↔	29.3%	n/a
Anglian Water (2015 base sample: 401)	39.8%	34%	44%	45%	46%	31%	↔	↑	-14%
Dŵr Cymru Welsh Water (2015 base sample: 402)	31.5%	35%	37%	29%	30%	26%	↓	↔	-4%
Northumbrian Water (2015 base sample: 201)	25.8%	21%	30%	31%	23%	24%	↔	↔	+2%
Severn Trent Water (2015 base sample: 500)	27.8%	33%	30%	26%	26%	23%	↓	↔	-2%
South West Water (2015 base sample: 401)	47.5%	40%	57%	52%	42%	48%	↔	↑	+6%
Thames Water (2015 base sample: 200)	25.0%	25%	28%	20%	25%	28%	↔	↔	+3%
United Utilities (2015 base sample: 401)	31.3%	24%	35%	31%	36%	32%	↔	↔	-3%
Wessex Water (2015 base sample: 500)	30.9%	25%	41%	32%	32%	25%	↔	↔	-6%
Yorkshire Water (2015 base sample: 400)	28.1%	26%	31%	28%	29%	27%	↔	↔	-2%

4.3.16 The WoC average for 2015 is 26% and awareness is highest for Portsmouth Water (36%) and lowest for Hartlepool Water (20%)[13].

4.3.17 There have been significant decreases since 2014 for Hartlepool Water, Sutton & East Surrey Water and Affinity Water Central.

4.3.18 There is a downward five-year trend for Dee Valley Water.

[13] Please note that all Affinity Water Southeast and some South East Water and Affinity Water Central customers are excluded from this question because of the companies' compulsory metering programmes.

Figure 42: Awareness of the possibility that you can trial a water meter for 12/24 months - WoCs

Awareness of the 12/24 month trial period for a water meter	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	29.3%	27%	33%	28%	30%	27%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	29.1%	25%	35%	29%	31%	26%	↔	29.1%	n/a
Affinity Water Central (2015 base sample: 250)	28.6%	22%	32%	28%	39%	21%	↔	↔	**-18%**
Affinity Water East (2015 base sample: 200)	35.3%	37%	26%	39%	44%	27%	↔	↔	-17%
Bournemouth Water (2015 base sample: 350)	32.2%	36%	32%	38%	26%	29%	↔	↔	+3%
Bristol Water (2015 base sample: 150)	32.3%	24%	42%	36%	32%	29%	↔	↔	-2%
Cambridge Water (2015 base sample: 150)	27.8%	27%	21%	29%	33%	29%	↔	↔	-4%
Dee Valley Water (2015 base sample: 150)	30.5%	36%	30%	34%	23%	30%	↓	↔	+7%
Essex & Suffolk Water (2015 base sample: 150)	28.4%	26%	33%	32%	30%	23%	↔	↔	-7%
Hartlepool Water (2015 base sample: 154)	24.6%	23%	23%	25%	31%	20%	↔	↔	**-11%**
Portsmouth Water (2015 base sample: 151)	26.7%	21%	33%	27%	18%	36%	↔	↔	+18%
South East Water (2015 base sample: 149)[14]	24.0%	75%		15%	25%	24%	↔	↔	-2%
South Staffs Water (2015 base sample: 151)	31.8%	28%	38%	35%	27%	32%	↔	↔	+5%
Sutton & East Surrey Water (2015 base sample: 152)	26.6%	21%	39%	19%	36%	21%	↔	↔	**-14%**

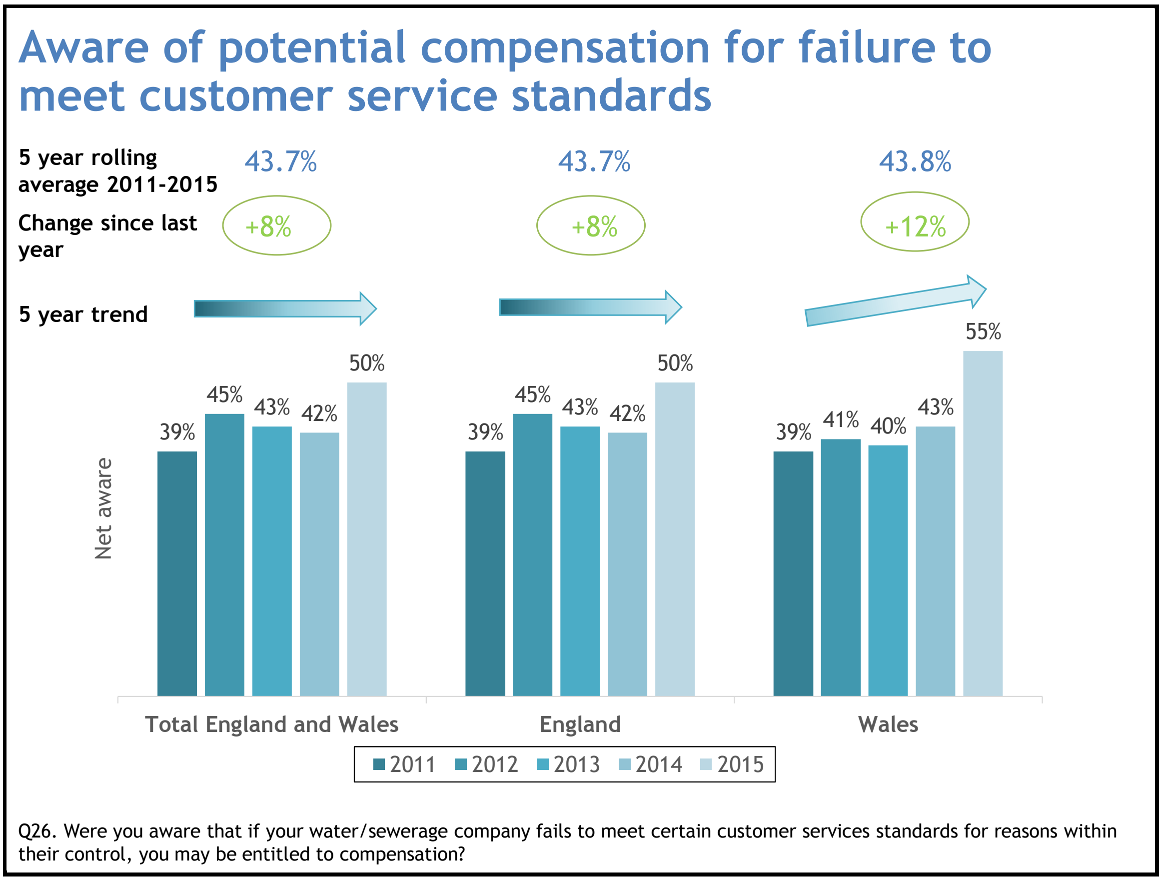
[14] Question not asked for South East Water in 2012

4.4 Service standards and compensation

4.4.1 The Guaranteed Service Standard (GSS) scheme entitles customers to compensation if their water or sewerage service provider fails to meet minimum service standards for reasons within their control. Customers' awareness of this compensation scheme has increased significantly this year (from 43% to 51%).

4.4.2 Awareness for customers in Wales has increased by a greater proportion from 2014 to 2015 than in England (from 43% to 55% compared with 42% to 50% respectively) and the five-year upward trend for Wales has been driven by this increase.

Figure 43: Awareness of compensation scheme for failure to meet service standards



4.4.3 There is a five-year upward trend for six of the ten WaSCs (Anglian Water, Welsh Water, Northumbrian Water, Severn Trent Water, South West Water, and United Utilities). South West Water has the highest awareness in 2015 (60%) and Thames Water and Yorkshire Water have the lowest (44%).

4.4.4 There have been significant increases since 2014 for the same six WaSCs (Anglian Water, Welsh Water, Northumbrian Water, Severn Trent Water, South West Water and United Utilities). Awareness for Yorkshire Water customers is the only company to show a decrease, albeit a minimal one (from 45% to 44%).

4.4.5 The five-year rolling average for South West Water (53.4%) is significantly higher than the WaSC average (43.9%).

Figure 44: Aware of compensation scheme for failure to meet service standards – WaSCs

Awareness of compensation scheme for failure to meet service standards	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	43.7%	39%	45%	43%	42%	50%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	43.9%	39%	45%	42%	42%	51%	↔	43.9%	n/a
Anglian Water (2015 base sample: 401)	43.2%	34%	44%	41%	42%	52%	↑	↔	+10%
Dŵr Cymru Welsh Water (2015 base sample: 402)	44.7%	39%	41%	40%	44%	55%	↑	↔	+12%
Northumbrian Water (2015 base sample: 201)	39.7%	31%	42%	41%	33%	53%	↑	↔	+21%
Severn Trent Water (2015 base sample: 500)	43.7%	43%	48%	41%	36%	52%	↑	↔	+16%
South West Water (2015 base sample: 401)	53.4%	47%	52%	55%	51%	60%	↑	↑	+9%
Southern Water (2015 base sample: 201)	43.9%	36%	47%	42%	45%	53%	↔	↔	+8%
Thames Water (2015 base sample: 200)	42.8%	41%	46%	41%	44%	44%	↔	↔	=
United Utilities (2015 base sample: 401)	45.6%	39%	43%	46%	44%	55%	↑	↔	+12%
Wessex Water (2015 base sample: 500)	47.2%	37%	47%	45%	49%	54%	↔	↔	+4%
Yorkshire Water (2015 base sample: 400)	42.5%	39%	44%	41%	45%	44%	↔	↔	-1%

4.4.6 Five of the thirteen WoCs have upward awareness trends over five years: Bristol Water, Affinity Water Southeast, Hartlepool Water, South East Water and Affinity Water Central. Awareness is highest amongst Bristol Water customers (57%) and lowest amongst Sutton & East Surrey Water customers (36%).

4.4.7 Awareness has increased significantly for four WoCs from 2014 to 2015, Bristol Water, Dee Valley Water, Hartlepool Water and South Staffordshire Water.

4.4.8 The five-year rolling average for Bournemouth Water (51.9%) is significantly higher than the WoC average (43.3%).

Figure 45: Awareness of compensation scheme for failure to meet service standards - WoCs

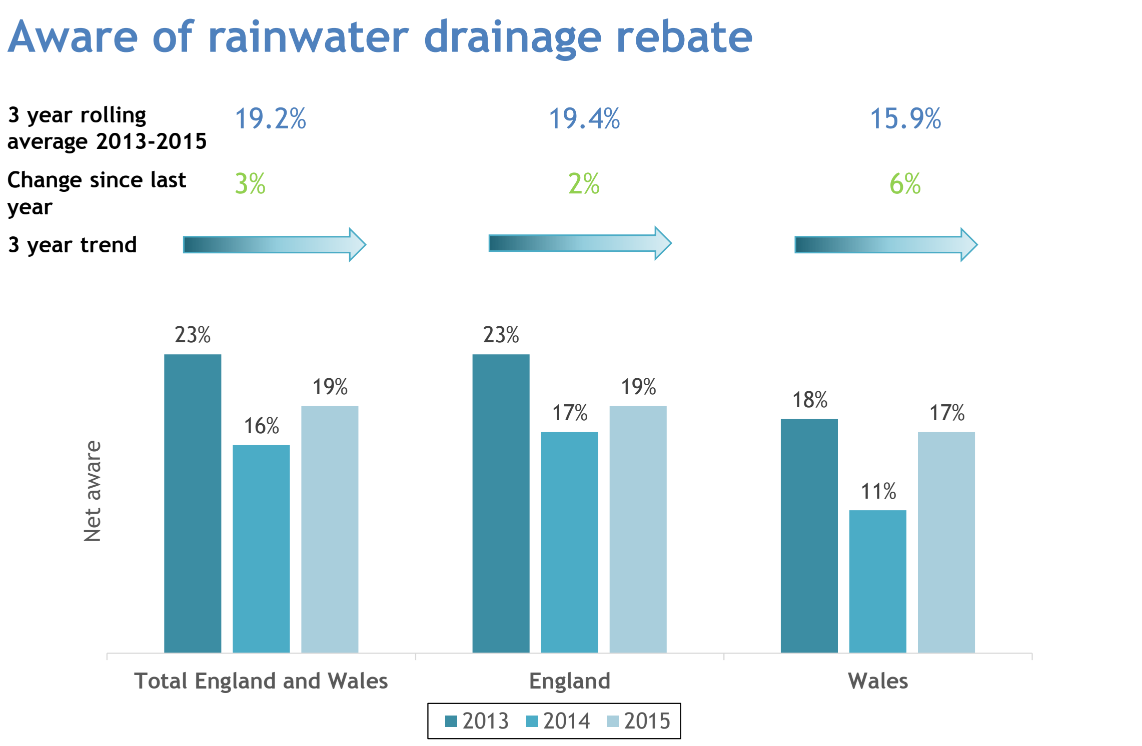
Awareness of compensation scheme for failure to meet service standards	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	43.7%	39%	45%	43%	42%	50%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	43.3%	39%	43%	43%	43%	49%	↔	43.3%	n/a
Affinity Water Central (2015 base sample: 250)	40.0%	33%	38%	40%	41%	48%	↑	↔	+7%
Affinity Water East (2015 base sample: 200)	42.3%	47%	40%	42%	41%	41%	↔	↔	=
Affinity Water Southeast (2015 base sample: 200)	44.2%	39%	40%	45%	44%	54%	↑	↔	+10%
Bournemouth Water (2015 base sample: 350)	51.9%	49%	57%	55%	45%	52%	↔	↑	+8%
Bristol Water (2015 base sample: 150)	46.1%	37%	49%	47%	44%	57%	↑	↔	+12%
Cambridge Water (2015 base sample: 150)	48.5%	47%	45%	52%	49%	51%	↔	↔	+2%
Dee Valley Water (2015 base sample: 150)	42.1%	42%	39%	37%	41%	52%	↔	↔	+11%
Essex & Suffolk Water (2015 base sample: 150)	43.9%	45%	45%	42%	43%	47%	↔	↔	+4%
Hartlepool Water (2015 base sample: 154)	40.4%	38%	39%	36%	39%	51%	↑	↔	+13%
Portsmouth Water (2015 base sample: 151)	46.0%	43%	40%	54%	45%	52%	↔	↔	+7%
South East Water (2015 base sample: 149)	43.0%	38%	45%	42%	43%	50%	↑	↔	+6%
South Staffs Water (2015 base sample: 151)	41.5%	35%	45%	44%	37%	49%	↔	↔	+12%
Sutton & East Surrey Water (2015 base sample: 152)	38.3%	38%	35%	37%	47%	36%	↔	↔	-10%

4.5 Awareness of rainwater drainage rebate

4.5.1 In 2013, a question was added to the survey to find out what proportion of customers are aware that a reduction in charges is available if the rainwater that runs off a property does not drain into the public sewer. The three year trend for awareness is stable; in 2015 just under one fifth (19%) of consumers are aware of the rebate, a slight improvement from 2014 (16%).

4.5.2 Awareness has increased by a greater margin in Wales in 2015, but still remains slightly lower than in England (17% compared with 19% respectively).

Figure 46: Awareness of rainwater drainage rebate



Q24. Did you know that if none of the rainwater that runs off a property drains into the public sewer (eg it may drain into a soakaway or the ground), a reduced sewerage bill is available?

4.5.3 Awareness is highest for Wessex Water (38%) and lowest for Thames Water (10%).

4.5.4 There is a downward three-year trend for Anglian Water, South West Water and Thames Water; the remaining WaSCs all have a stable trend.

4.5.5 Awareness for Southern Water customers has increased significantly since 2014 (from 22% to 30% in 2015).

4.5.6 Northumbrian Water has a significantly lower three-year rolling average of 8.2% compared with the WaSC average of 18.4%, whereas South West Water (31.6%) and Wessex Water (37.4%) have significantly higher three-year rolling averages.

Figure 47: Awareness of rainwater drainage rebate - WaSCs

Aware of rainwater drainage rebate	3 year rolling company average	Three year company trend			3 year company trend	Company average vs WaSC average	Company change since last year
		2013	2014	2015			
Industry (2015 base sample: 5964)	19.2%	23%	16%	19%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	18.4%	21%	16%	18%	↔	18.4%	n/a
Anglian Water (2015 base sample: 401)	25.2%	31%	23%	24%	↓	↔	+1%
Dŵr Cymru Welsh Water (2015 base sample: 402)	15.7%	19%	12%	18%	↔	↔	+6%
Northumbrian Water (2015 base sample: 201)	8.2%	8%	7%	11%	↔	↓	+4%
Severn Trent Water (2015 base sample: 500)	20.2%	24%	17%	20%	↔	↔	+4%
South West Water (2015 base sample: 401)	31.6%	39%	24%	28%	↓	↑	+4%
Southern Water (2015 base sample: 201)	26.6%	28%	22%	30%	↔	↔	**+8%**
Thames Water (2015 base sample: 200)	14.5%	17%	13%	10%	↓	↔	-3%
United Utilities (2015 base sample: 401)	13.2%	12%	11%	16%	↔	↔	+4%
Wessex Water (2015 base sample: 500)	37.4%	43%	32%	38%	↔	↑	+6%
Yorkshire Water (2015 base sample: 400)	17.7%	23%	13%	17%	↔	↔	+4%

4.5.7 Bournemouth Water customers have the highest awareness amongst the WoCs (38%), whereas Hartlepool Water customers have the lowest (10%).

4.5.8 The three-year trend for Bournemouth Water, Portsmouth Water and Sutton & East Surrey Water is downward and the rest are stable.

4.5.9 Four WoCs have a significantly higher three-year rolling average than the WoC average of 22.1%, namely Bournemouth Water (40.2%), Bristol Water (35.3%), Cambridge Water (30.6%) and Affinity Water Southeast (31.2%). Dee Valley Water (12.0%) and Hartlepool Water (10.6%) have significantly lower three-year rolling averages.

Figure 48: Awareness of rainwater drainage rebate - WoCs

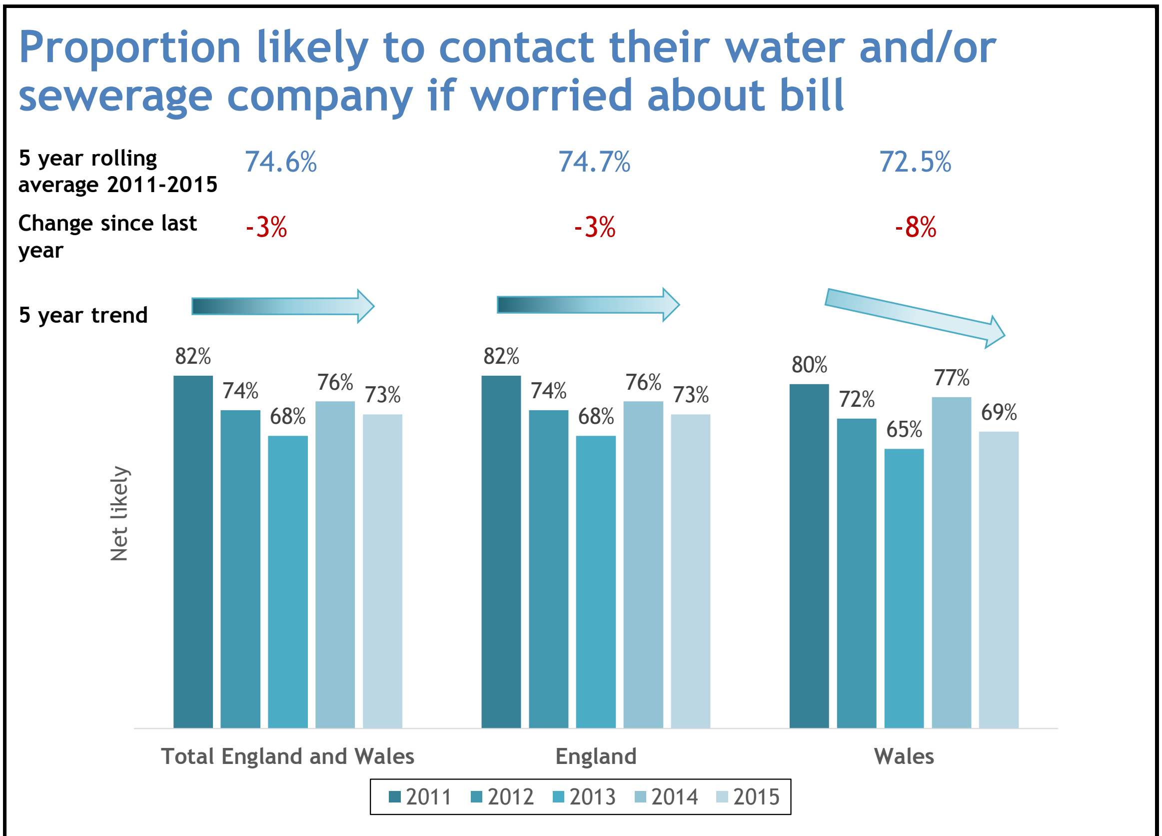
Awareness of rainwater drainage rebate	3 year rolling company average	Three year company trend			3 year company trend	Company average vs WoC average	Company change since last year
		2013	2014	2015			
Industry (2015 base sample: 5964)	19.2%	23%	16%	19%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	22.1%	27%	19%	21%	↔	22.1%	n/a
Affinity Water Central (2015 base sample: 250)	14.5%	19%	14%	12%	↔	↔	-1%
Affinity Water East (2015 base sample: 200)	24.7%	25%	23%	26%	↔	↔	+3%
Affinity Water Southeast (2015 base sample: 200)	31.2%	38%	25%	31%	↔	↑	+5%
Bournemouth Water (2015 base sample: 350)	40.2%	51%	34%	38%	↓	↑	+4%
Bristol Water (2015 base sample: 150)	35.3%	41%	30%	37%	↔	↑	+7%
Cambridge Water (2015 base sample: 150)	30.6%	41%	23%	28%	↔	↑	+5%
Dee Valley Water (2015 base sample: 150)	12.0%	15%	8%	13%	↔	↓	+5%
Essex & Suffolk Water (2015 base sample: 150)	18.6%	23%	13%	15%	↔	↔	+3%
Hartlepool Water (2015 base sample: 154)	10.6%	11%	11%	10%	↔	↓	=
Portsmouth Water (2015 base sample: 151)	28.6%	37%	23%	25%	↓	↔	+2%
South East Water (2015 base sample: 149)	25.0%	25%	23%	26%	↔	↔	+3%
South Staffs Water (2015 base sample: 151)	20.3%	28%	13%	20%	↔	↔	+7%
Sutton & East Surrey Water (2015 base sample: 152)	17.1%	21%	17%	13%	↓	↔	-4%

4.6 Contacting water companies

4.6.1 Just under three-quarters (73%) say they would contact their water company if they were worried about paying their bill. This is slightly lower than in 2014 (76%).

4.6.2 The five-year trend for England and Wales is stable, however, for Wales it is downward. The year on year figures for Wales have also fallen this year (from 77% to 69%) following a significant increase from 2013 to 2014 (from 65% to 77%).

Figure 49: Proportion likely to contact their water company if worried about bill



Q18. How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill?

4.6.3 The 2015 WaSC average is 72%, slightly lower than last year (76%). Likelihood to contact is highest for Anglian Water and Southern Water (77%) and lowest for Northumbrian Water (67%). Furthermore, likelihood to contact for Northumbrian Water customers has decreased significantly since 2014 (from 77% to 67%).

4.6.4 There is a downward five-year trend for customers of South West Water and Thames Water, who are gradually becoming less likely to make contact if they are worried about paying their bill.

Figure 50: Proportion likely to contact their water company if worried about bill - WaSCs

Likely to contact if worried about bill	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	74.6%	82%	74%	68%	76%	73%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	74.6%	83%	74%	67%	76%	72%	↔	74.6%	n/a
Anglian Water (2015 base sample: 401)	77.1%	87%	73%	68%	78%	77%	↔	↔	=
Dŵr Cymru Welsh Water (2015 base sample: 402)	72.9%	80%	72%	64%	77%	68%	↔	↔	-8%
Northumbrian Water (2015 base sample: 201)	72.2%	82%	69%	67%	77%	67%	↔	↔	-10%
Severn Trent Water (2015 base sample: 500)	76.5%	84%	77%	70%	78%	75%	↔	↔	-3%
South West Water (2015 base sample: 401)	77.4%	85%	81%	74%	75%	74%	↓	↔	-2%
Southern Water (2015 base sample: 201)	79.5%	87%	78%	73%	81%	77%	↔	↔	-4%
Thames Water (2015 base sample: 200)	71.1%	81%	75%	62%	72%	68%	↓	↔	-4%
United Utilities (2015 base sample: 401)	74.1%	81%	73%	67%	76%	72%	↔	↔	-4%
Wessex Water (2015 base sample: 500)	77.6%	84%	82%	72%	77%	76%	↔	↔	-1%
Yorkshire Water (2015 base sample: 400)	73.9%	83%	69%	69%	77%	73%	↔	↔	-3%

4.6.5 The WoC average for 2015 is 73% and likelihood of contact is highest for South Staffordshire Water (80%) and lowest for Sutton & East Surrey Water (64%). A downward five-year trend is evident for Sutton & East Surrey Water, along with Affinity Water East.

Figure 51: Proportion likely to contact their water company if worried about bill - WoCs

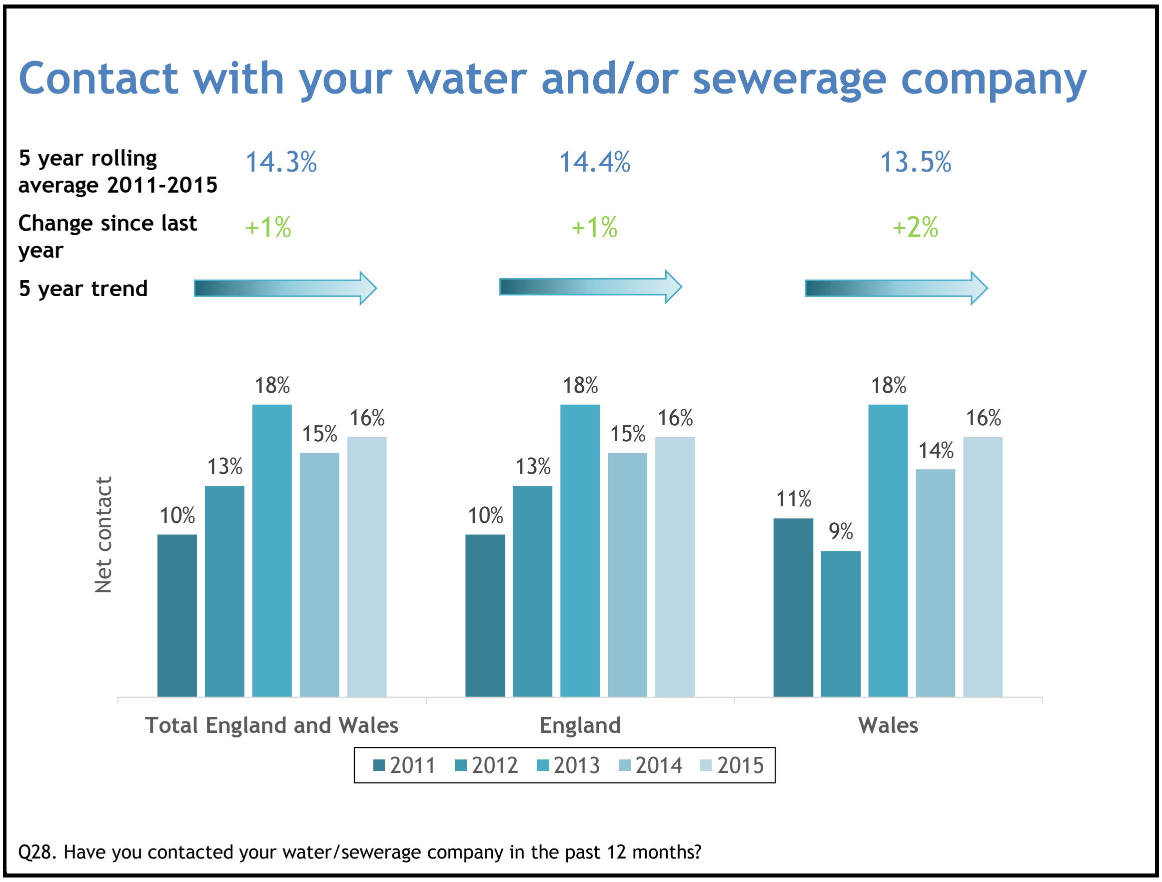
Likely to contact if worried about bill	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	74.6%	82%	74%	68%	76%	73%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	74.5%	80%	74%	70%	76%	73%	↔	74.5%	n/a
Affinity Water Central (2015 base sample: 250)	71.4%	74%	70%	68%	76%	69%	↔	↔	-6%
Affinity Water East (2015 base sample: 200)	73.6%	84%	70%	72%	71%	69%	↓	↔	-2%
Affinity Water Southeast (2015 base sample: 200)	76.9%	77%	84%	69%	74%	77%	↔	↔	+3%
Bournemouth Water (2015 base sample: 350)	77.1%	87%	75%	67%	71%	79%	↔	↔	+7%
Bristol Water (2015 base sample: 150)	74.8%	85%	77%	68%	74%	76%	↔	↔	+2%
Cambridge Water (2015 base sample: 150)	74.1%	78%	73%	67%	79%	73%	↔	↔	-6%
Dee Valley Water (2015 base sample: 150)	74.6%	81%	71%	73%	74%	73%	↔	↔	-1%
Essex & Suffolk Water (2015 base sample: 150)	73.1%	80%	71%	69%	74%	76%	↔	↔	+1%
Hartlepool Water (2015 base sample: 154)	78.1%	83%	73%	79%	77%	77%	↔	↔	=
Portsmouth Water (2015 base sample: 151)	75.2%	81%	73%	66%	83%	73%	↔	↔	**-10%**
South East Water (2015 base sample: 149)	76.0%	82%	79%	71%	76%	74%	↔	↔	-1%
South Staffs Water (2015 base sample: 151)	79.2%	80%	76%	80%	82%	80%	↔	↔	-2%
Sutton & East Surrey Water (2015 base sample: 152)	70.8%	78%	71%	68%	70%	64%	↓	↔	-7%

4.6.6 Respondents were asked if they had contacted their water company in the last 12 months. A similar proportion made contact with their water company in 2015 as in 2014 (16% compared to

15%). Metered customers are more likely than unmetered to make contact (76% compared with 70%) as are households which claim benefits compared to those which do not (78% compared with 71%).

4.6.7 There is no difference between England and Wales with 16% in both countries contacting their water and/or sewerage company.

Figure 52: Proportions contacting their water company in the last 12 months



4.6.8 The average WaSC score for 2015 is 17%. The companies with the lowest rate of contact (14%) are Northumbrian Water, Severn Trent Water and Thames Water. Southern Water has the highest proportion of customers who contacted them in the last 12 months - 26%. This is a significant increase since 2014 (from 14% to 26%) and is part of an upward five-year trend. This may be due to increased enquiries driven by its compulsory metering programme. South West Water also has an upward five-year trend, with contacts having doubled from 11% in 2011 to 22% in 2015. However, their year on year score has only changed by +2% since 2014.

Figure 53 Proportions contacting their water company in the last 12 months - WaSCs

Contact with your water and/or sewerage company	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	14.3%	10%	13%	18%	15%	16%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	14.4%	10%	13%	17%	15%	17%	↔	14.4%	n/a
Anglian Water (2015 base sample: 401)	18.8%	16%	17%	23%	17%	22%	↔	↔	+5%
Dŵr Cymru Welsh Water (2015 base sample: 402)	13.2%	11%	9%	17%	14%	15%	↔	↔	+1%
Northumbrian Water (2015 base sample: 201)	11.9%	6%	12%	17%	9%	14%	↔	↔	+5%
Severn Trent Water (2015 base sample: 500)	12.9%	8%	13%	14%	13%	14%	↔	↔	=
South West Water (2015 base sample: 401)	18.9%	11%	16%	24%	20%	22%	↑	↔	+2%
Southern Water (2015 base sample: 201)	15.3%	10%	11%	19%	14%	26%	↑	↔	+12%
Thames Water (2015 base sample: 200)	13.6%	11%	9%	17%	17%	14%	↔	↔	-4%
United Utilities (2015 base sample: 401)	13.6%	8%	15%	13%	14%	17%	↔	↔	+2%
Wessex Water (2015 base sample: 500)	15.7%	8%	15%	21%	16%	16%	↔	↔	=
Yorkshire Water (2015 base sample: 400)	15.5%	9%	18%	17%	15%	18%	↔	↔	+3%

4.6.9 Contact across the WoCs is relatively stable, with a five-year upward trend for only one company (Portsmouth Water) and there has been little change for any company from 2014 to 2015. Cambridge Water customers have contacted least (10%) and Dee Valley customers most (22%).

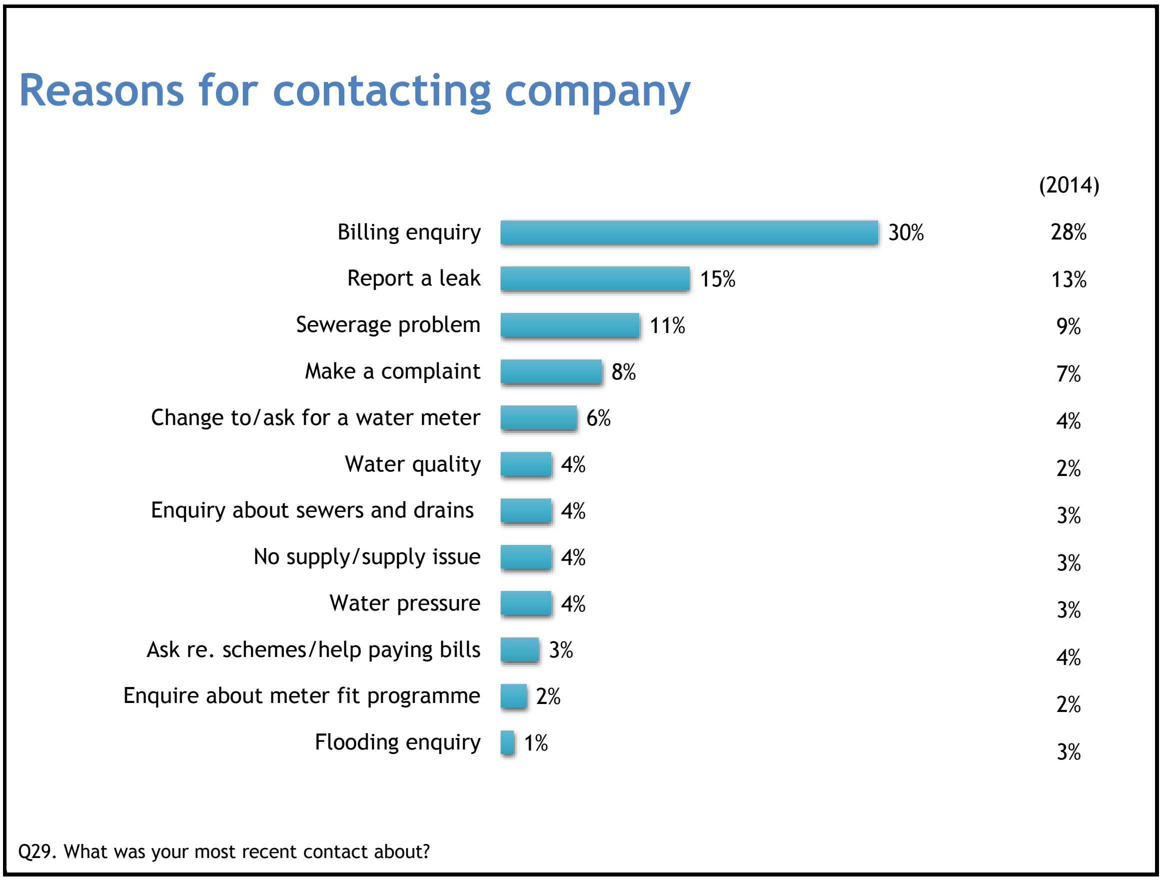
Figure 54: Proportions contacting their water company in the last 12 months - WoCs

Contact with your water and/or sewerage company	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	14.3%	10%	13%	18%	15%	16%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	14.3%	9%	13%	19%	15%	15%	↔	14.3%	n/a
Affinity Water Central (2015 base sample: 250)	13.7%	6%	17%	20%	15%	13%	↔	↔	-2%
Affinity Water East (2015 base sample: 200)	14.7%	11%	18%	19%	11%	16%	↔	↔	+5%
Affinity Water Southeast (2015 base sample: 200)	17.7%	13%	13%	25%	19%	21%	↔	↔	+2%
Bournemouth Water (2015 base sample: 350)	13.2%	9%	11%	16%	15%	16%	↔	↔	+1%
Bristol Water (2015 base sample: 150)	13.8%	10%	9%	19%	13%	17%	↔	↔	+4%
Cambridge Water (2015 base sample: 150)	13.9%	9%	13%	21%	19%	10%	↔	↔	-8%
Dee Valley Water (2015 base sample: 150)	15.7%	12%	11%	25%	12%	22%	↔	↔	+10%
Essex & Suffolk Water (2015 base sample: 150)	14.5%	10%	13%	18%	17%	15%	↔	↔	-2%
Hartlepool Water (2015 base sample: 154)	12.8%	8%	12%	22%	13%	11%	↔	↔	-3%
Portsmouth Water (2015 base sample: 151)	12.4%	8%	5%	19%	17%	18%	↑	↔	+1%
South East Water (2015 base sample: 149)	17.3%	13%	13%	24%	15%	16%	↔	↔	+1%
South Staffs Water (2015 base sample: 151)	11.8%	9%	13%	14%	10%	14%	↔	↔	+4%
Sutton & East Surrey Water (2015 base sample: 152)	12.5%	13%	10%	16%	13%	12%	↔	↔	-1%

4.6.10 The main reasons for making contact are to make a billing enquiry (30%), followed by reporting a leak (15%), similar to previous years. Billing enquiry contacts have increased significantly since 2013 (23%).

4.6.11 Respondents who are dissatisfied with the value for money of water services are more likely to have contacted their water company than those who are satisfied (26% compared with 15%) and this is true for value for money of sewerage services as well (25% compared with 15%). This pattern also continues for respondents who are dissatisfied overall with their water services (36% compared with 16%) and sewerage services (31% compared with 15%). Also, metered customers are more likely to have contacted their water company than unmetered customers (20% compared with 13%) and younger respondents (18-29 25%, 30-44 19%, 45-59 17%) are more likely to have contacted their water and/or sewerage company than the older age groups (60-74 14%, 75+ 11%).

Figure 55: Reasons for contacting company

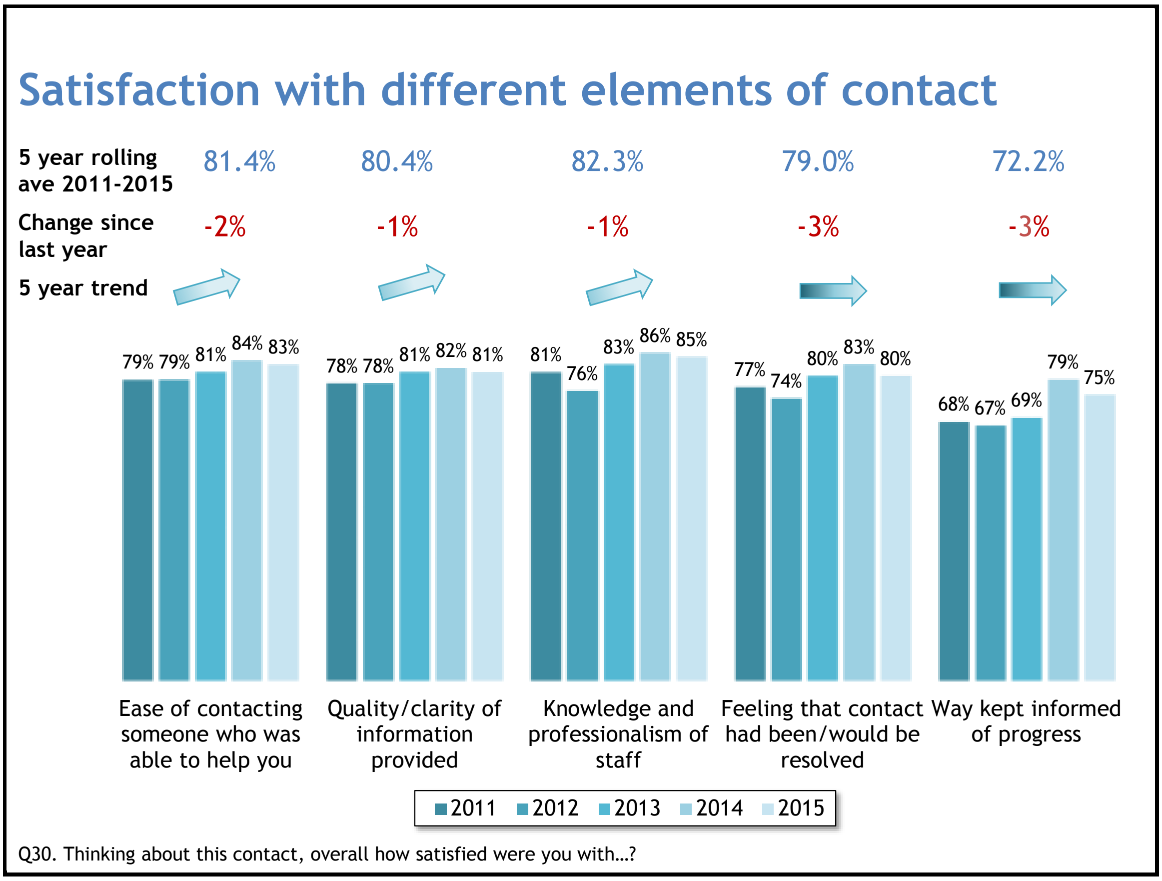


Base: All respondents contacting their water and/or sewerage company (989)

4.6.12 There have been slight falls in satisfaction across all aspects of contact since 2014; however, there is an upward five-year trend for three attributes: ease of contacting someone who could help, the quality/clarity of information provided and the knowledge and professionalism of staff.

4.6.13 Some company sample sizes are very small therefore results are only shown for England and Wales.

Figure 56: Satisfaction with different aspects of contact

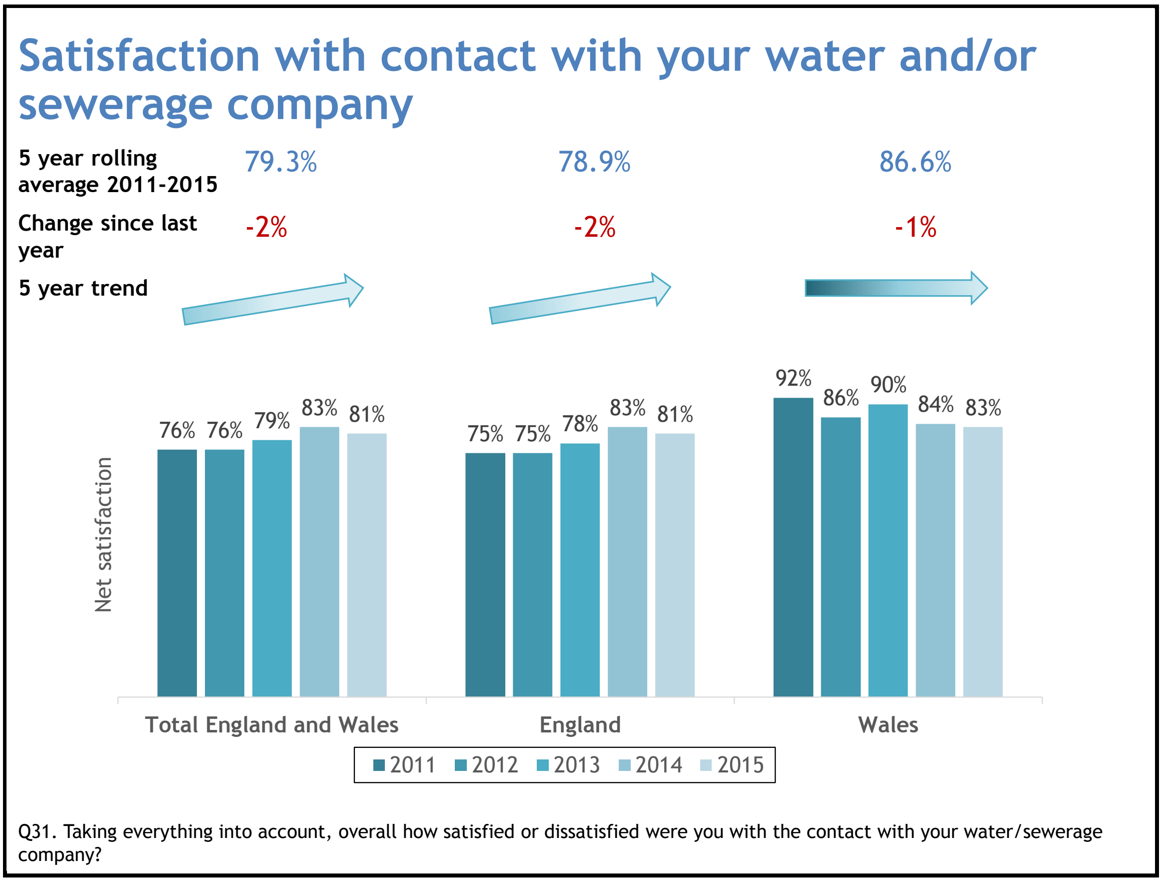


Base: All respondents contacting their water and/or sewerage company (989)

4.6.14 Taking all aspects into account, overall satisfaction with contact is high, with over four-fifths (81%) of consumers who made contact reporting they were satisfied with their experience. There is an upward trend over the past five years, although satisfaction in England and Wales has dropped by 2% from 2014 to 2015.

4.6.15 Satisfaction levels are similar in England and Wales (81% compared with 83%) with England having witnessed a five-year upward trend and Wales a stable trend.

Figure 57: Satisfaction with different aspects of contact

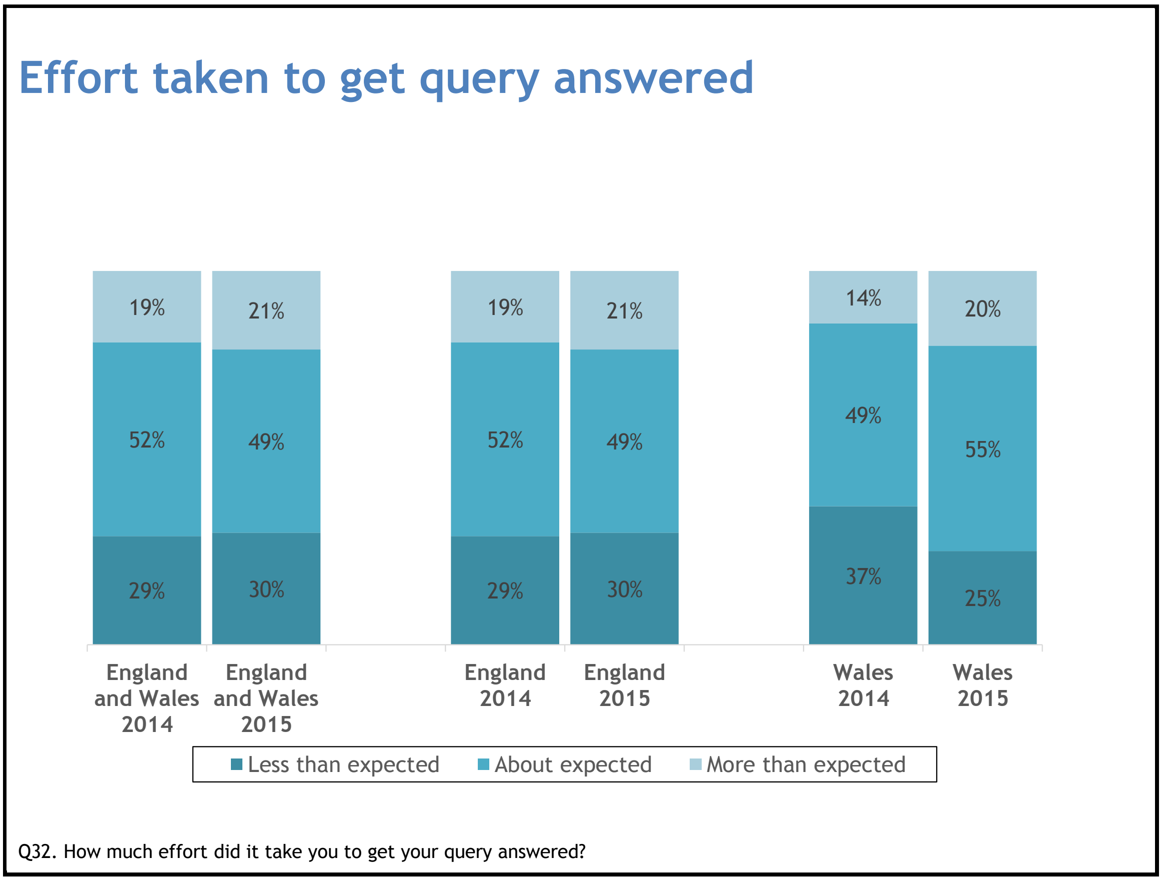


4.6.16 Reason for contact continues to impact on overall satisfaction with contact, with significantly lower satisfaction for respondents who made contact with a complaint (51%) rather than a general enquiry billing enquiry (80%), to report a leak (84%) or a sewerage service query (77%).

4.6.17 A new question was added in 2014 to measure the amount of effort customers feel it takes to get their query answered. Nearly half of customers (49%) are putting in the amount of effort they expected and a higher proportion say it took "less" than "more" effort. Overall, one in five customers said it took them more effort than expected (21%) and three in ten customers said it took them less effort than expected (30%). This is a similar picture to 2014 (52% as expected, more effort 19%, less effort 29%).

4.6.18 This year fewer consumers in Wales said it took less effort than expected than in 2014 (25% compared with 37% respectively).

Figure 58: Effort taken to get query answered

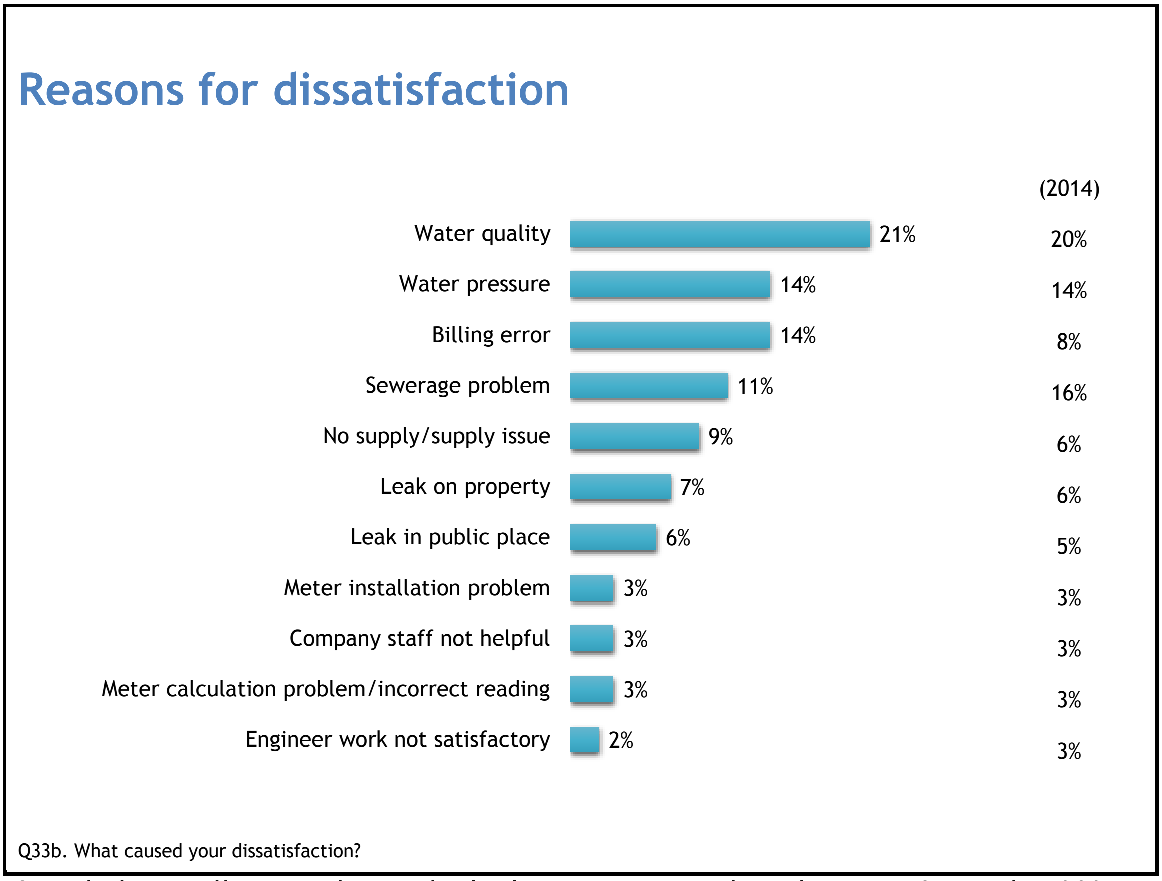


4.6.19 In the past 12 months, 8% of those contacting their water company did so to complain (the same proportion as in 2014). This equates to 1% of the total number of customers interviewed. However, a further 5% felt they had reason to complain about something but chose not to. These two figures combined mean that nearly 1 in 20 customers overall (6%) think they have a complaint.

4.6.20 The main causes of this dissatisfaction are operational issues, i.e. water quality (21%), water pressure (14%), sewerage problems (11%) and loss of supply (9%) rather than billing problems, i.e. billing error 14% and incorrect meter readings (3%).

4.6.21 Contact about billing errors has increased from 8% in 2014 to 14% this year, whereas contacts about sewerage problems have fallen from 16% in 2014 to 11% in 2015.

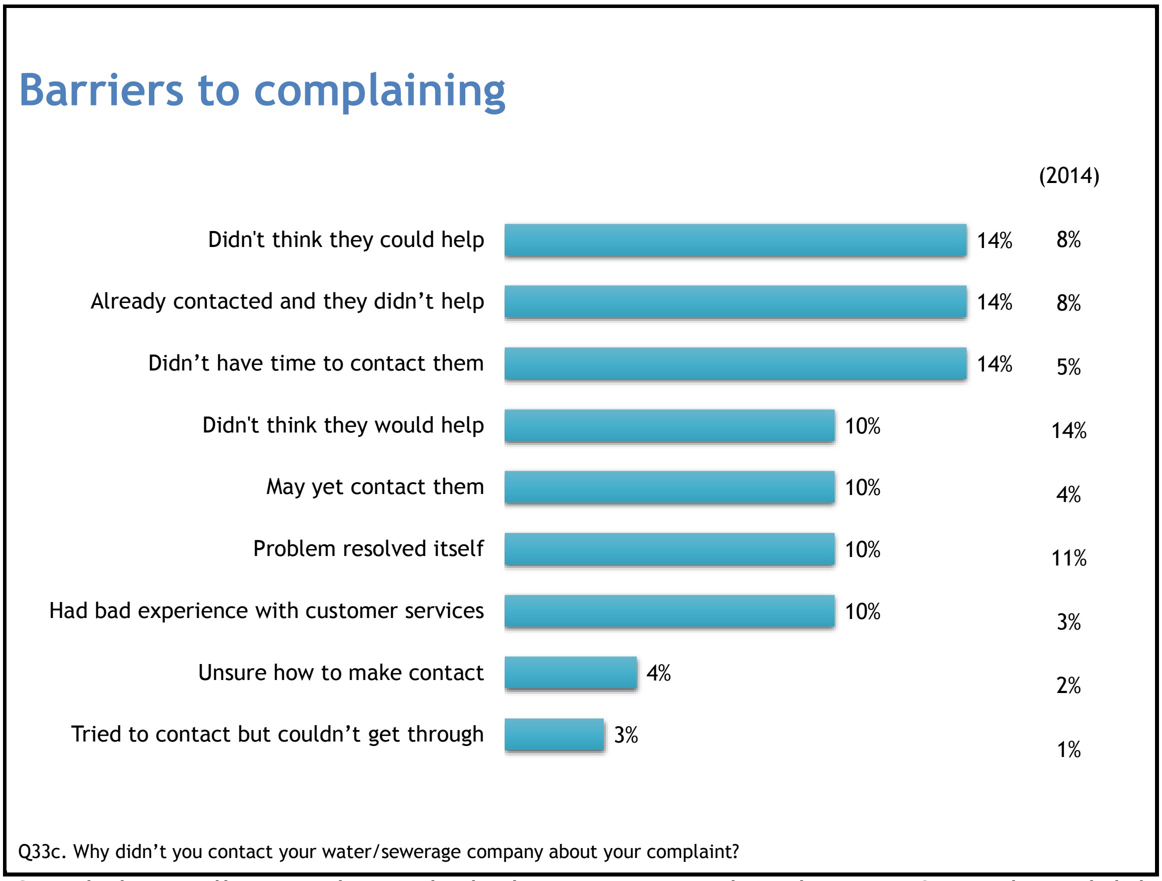
Figure 59: Reasons for dissatisfaction



Sample base: all respondents who had reason to complain the past 12 months (989)

4.6.22 Of those who felt they had cause to complain over the last 12 months but didn't, nearly a sixth did not complain because they doubted their water company's ability to help them (14%). A further 14% doubted their *willingness* to help having already contacted them about the same issue, and 14% said they simply had not had the time to contact them.

Figure 60: Barriers to complaining



Sample base: all respondents who had reason to complain the past 12 months and didn't (276)

5 Water on tap

This chapter first presents customers' views on satisfaction with various aspects of their water supply and the water service as a whole before moving on to their understanding of who is responsible for water pipe maintenance.

Key five-year trends

- Overall satisfaction with water supply continues at a very high level, with a five-year average score of 92.5% across England and Wales, and a stable five-year trend.
- Satisfaction with water hardness/softness is still some 20% lower than satisfaction with other aspects of the water supply service but the five-year trend is an upward one. All other attributes have a stable five-year trend; customers continue to be most satisfied with reliability of supply.

Key changes since 2014

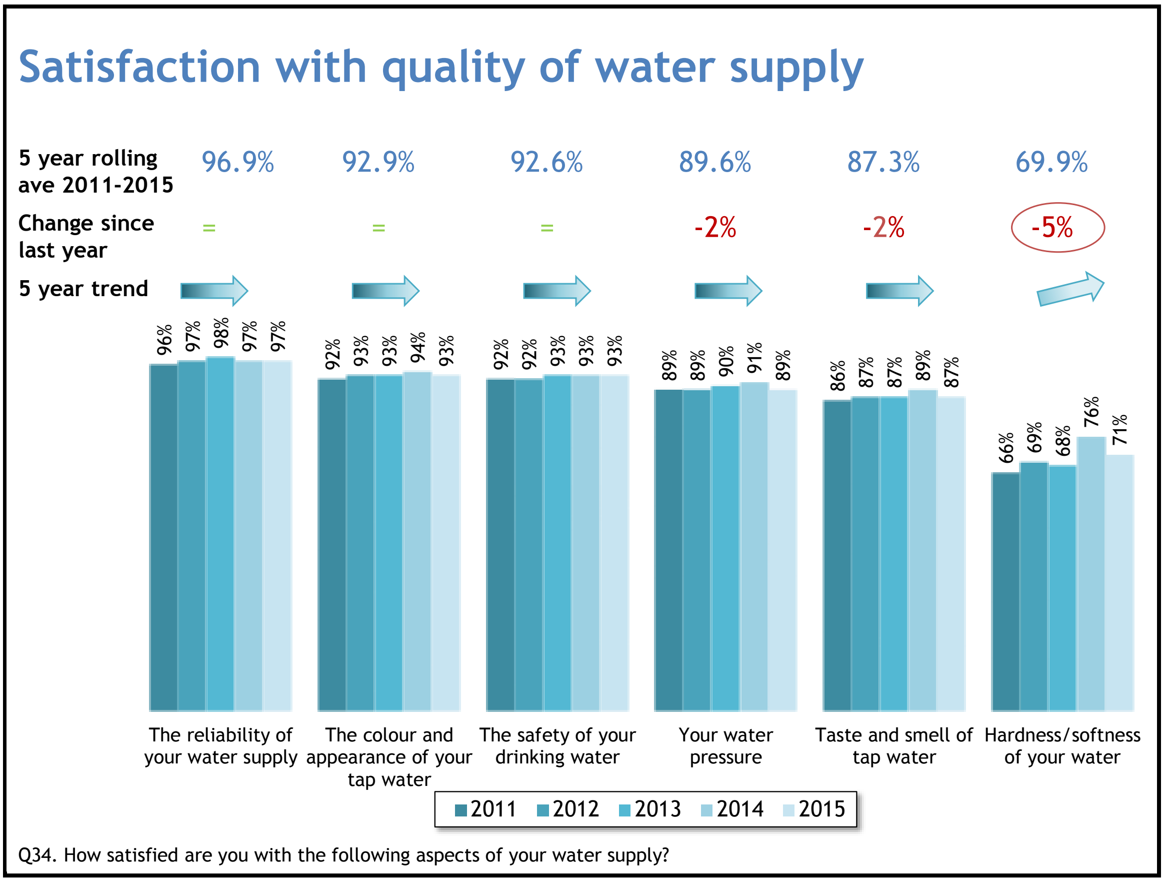
- There has been a small decrease in overall satisfaction with the water supply service over the past year (94% to 93%), however satisfaction remains very high.
- Satisfaction with two aspects of the service has remained stable since 2014 and has fallen for four aspects. These four are the colour and appearance of tap water (although due to percentage rounding it shows as stable in 2015), water pressure, taste and smell and hardness/softness. The latter has decreased significantly (from 76% to 71%).
- Four-fifths of homeowners know they are responsible for maintaining the water pipes within their property's boundary, a significant increase since 2014 (79% compared to 72%).
- Overall satisfaction with water supply, and with four out of the six aspects of water supply, is significantly higher in Wales than in England.

5.1 Satisfaction with water supply

5.1.1 Satisfaction with various aspects of water supply remains at a very high level, with over 90% of customers happy with reliability, colour and appearance, and safety of drinking water. There has been a significant increase since 2014 in satisfaction with hardness/softness of water (71% from 76%). Satisfaction with water pressure, and the taste and smell of tap water have both fallen by 2% since 2014, although satisfaction levels remain very high (above 90%).

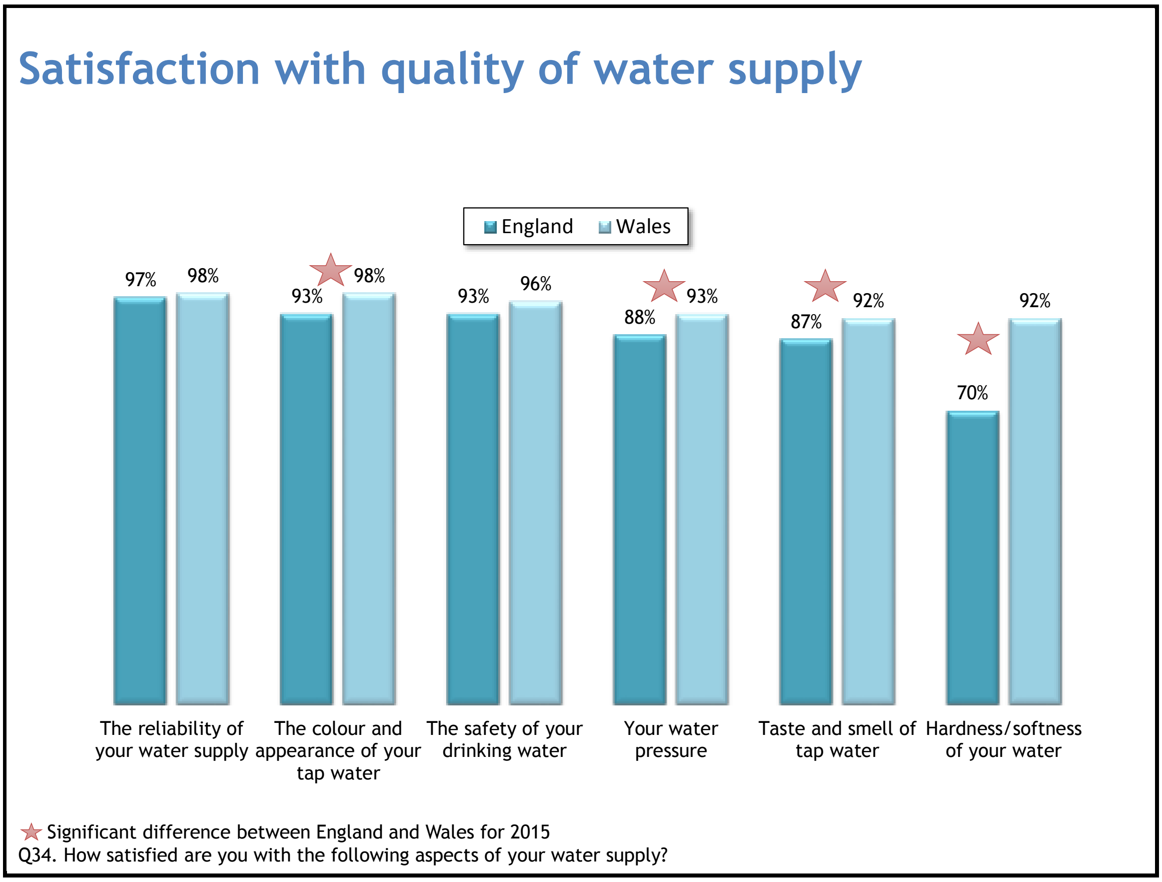
5.1.2 Although customers are relatively less satisfied with the hardness/softness of their water, over the past five-years satisfaction has still improved significantly. For the remaining service attributes, the five-year trend is stable with satisfaction remaining at a very high level.

Figure 61: Satisfaction with aspects of water supply



5.1.3 Customers in Wales are more satisfied with their water supply than customers in England; the significant differences relate to the water itself rather than its delivery, with the exception of water supply pressure. The biggest difference concerns the hardness/softness of water, where nearly all Welsh customers (92%) compared to just over three-quarters of English customers (70%) are satisfied.

Figure 62: Satisfaction with aspects of water supply - England v Wales



5.1.4 Figure 63 overleaf shows net satisfaction with each aspect of water supply by WaSC. It also shows the industry as a whole and WaSC average.

5.1.5 Welsh Water, Northumbrian Water and Yorkshire Water are the highest ranking WaSCs, and are top on at least two aspects of water supply service. Thames Water is the lowest ranking WaSC across all six aspects of supply. The top and bottom rated WaSCs are highlighted by green and red text for each attribute.

5.1.6 There is an upward five-year trend for all WaSCs combined for satisfaction with hardness/softness of water. For the individual companies, there is only one downward trend over the past five-years: for water pressure for Thames Water.

5.1.7 There is only one significant change from 2014 to 2015 for the individual companies: for hardness/softness of water for Anglian Water (from 70% to 57%).

Figure 63: Satisfaction with aspects of water supply - WaSCs

Satisfaction with quality of water supply [15]	Reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste & smell of tap water	Hardness/ softness of water
Industry (2015 base sample: 5964)	97%	93%	93%	89%	87%	71%
Total WaSCs (2015 base sample: 3607)	97%	93%	93%	89%	88%	74%↑
Anglian Water (2015 base sample: 401)	96%	94%	93%	90%	88%	57%
Dŵr Cymru Welsh Water (2015 base sample: 402)	98%	98%	96%	93%	92%	92%
Northumbrian Water (2015 base sample: 201)	99%	96%	95%	94%	91%	89%
Severn Trent Water (2015 base sample: 500)	99%	93%	94%	91%	89%	76%
South West Water (2015 base sample: 401)	97%	95%	94%	90%	86%	88%
Southern Water (2015 base sample: 201)	96%	92%	92%	90%	89%	58%
Thames Water (2015 base sample: 200)	91%	90%	89%	80%↓	79%	55%
United Utilities (2015 base sample: 401)	97%	94%	93%	89%	90%	89%
Wessex Water (2015 base sample: 500)	97%	93%	95%	89%	88%	62%
Yorkshire Water (2015 base sample: 400)	97%	95%	98%	92%	92%	85%

The top and bottom rated WaSCs are highlighted by green and red text for each attribute.

5.1.8 Figure 66 overleaf shows satisfaction with each aspect of water supply by WoC. It also shows the Industry as a whole and 2015 WoC average.

5.1.9 Bournemouth Water, Hartlepool Water and South Staffordshire Water have the highest satisfaction levels with their water supply service. A number of WoCs rank bottom across the various attributes, with South East Water the lowest ranking on two. The top and bottom rating WoCs are highlighted by green and red text for each attribute.

5.1.10 The five-year trends for each aspect of water supply are:

- Reliability of water supply: stable trend for all companies
- Colour and appearance: upward trend for Affinity Water Central
- Safety of drinking water: upward trend for Bournemouth Water
- Water pressure: stable trend for all companies
- Taste and smell of tap water: upward trends for Bournemouth Water, Affinity Water Central

[15] An arrow denotes a five-year trend (green = upward, red = downward). A circle denotes a significant change from 2014 to 2015 (green = increase, red = decrease)

- Hardness/softness of water: upward trends for Bournemouth Water, Hartlepool Water, Affinity Water Central

5.1.11 There are two significant changes from 2014 to 2015 - all decreases, and only for hardness/softness of water: Affinity Water Southeast (from 66% to 53%) and Affinity Water East (from 69% to 52%).

Figure 64: Satisfaction with aspects of water supply - WoCs

	Reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste & smell of tap water	Hardness/ softness of water
Industry (2015 base sample: 5964)	97%	93%	93%	89%	87%	71%
Total WoCs (2015 base sample: 2357)	98%	93%	94%	88%	86%	60%
Affinity Water Central (2015 base sample: 250)	96%	94%	93%	85%↑	85%	51%↑
Affinity Water East (2015 base sample: 200)	98%	91%	93%	83%	90%	52%
Affinity Water Southeast (2015 base sample: 200)	98%	92%	91%	88%	84%	53%
Bournemouth Water (2015 base sample: 350)	99%	96%	97%↑	91%	93%↑	64%↑
Bristol Water (2015 base sample: 150)	98%	94%	95%	87%	87%	66%
Cambridge Water (2015 base sample: 150)	97%	95%	94%	89%	84%	52%
Dee Valley Water (2015 base sample: 150)	95%	92%	92%	88%	92%	89%
Essex & Suffolk Water (2015 base sample: 150)	99%	92%	90%	85%	86%	58%
Hartlepool Water (2015 base sample: 154)	99%	94%	95%	96%	92%	75%↑
Portsmouth Water (2015 base sample: 151)	98%	95%	95%	89%	90%	63%
South East Water (2015 base sample: 149)	99%	89%	93%	89%	80%	54%
South Staffs Water (2015 base sample: 151)	99%	97%	97%	95%	91%	80%
Sutton & East Surrey Water (2015 base sample: 152)	98%	95%	95%	90%	92%	69%

The top and bottom rated WaSCs are highlighted by green and red text for each attribute.

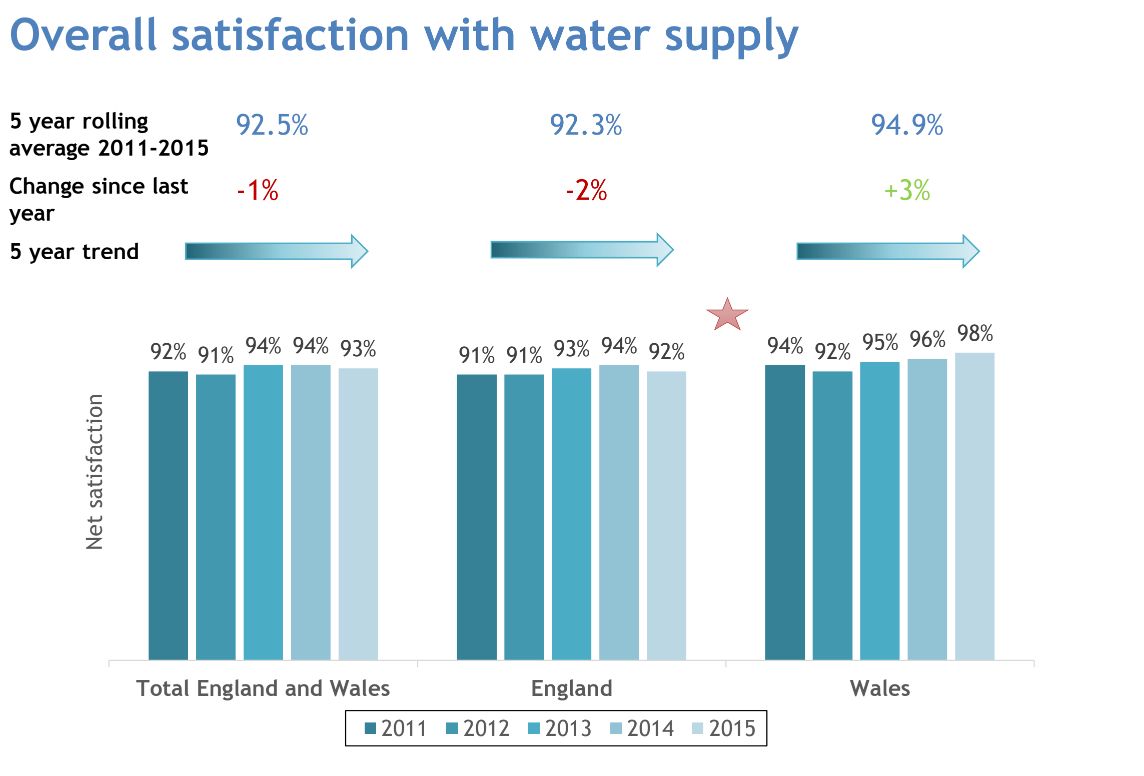
5.1.12 The high satisfaction ratings for individual aspects of the water supply underpin the very high levels of overall satisfaction. This year sees 93% satisfied compared with 94% in 2014.

5.1.13 Overall satisfaction is significantly higher in Wales than in England this year.

5.1.14 Customers in the 60-74 and 75+ age brackets are more satisfied (94% and 96% respectively) than those aged 30-44 or 45-59 (91% each). Metered customers who requested their meter (95%) are more satisfied than those who already had a meter in the property when they moved in (92%) or were compulsorily metered (89%). Customers without a disability (94%) were more satisfied than those who did or who had someone in the household who had one (88% each).

5.1.15 Fewer than 400 respondents (7%) were satisfied with their water supply but dissatisfied with the value for money of their water service. The main reason for this dissatisfaction is that the cost/prices have risen (60% of 371 respondents). Fewer respondents were more dissatisfied with value for money this year (524/9% in 2014), however the main reason why remains the same (67%).

Figure 65: Overall satisfaction with water supply



Q35. Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply? ★ Significant difference between England and Wales for 2015

5.1.16 The WaSC average for overall satisfaction with water supply in 2015 is 92%; Welsh Water customers have the highest satisfaction at 99% and Southern Water customers have the lowest at 87%. This is interesting, given that Thames Water is the lowest scoring WaSC across the 6 individual service attributes, below Southern Water.

5.1.17 There is an upward five-year trend for South West Water.

Figure 66: Overall satisfaction with water supply - WaSCs

Overall satisfaction with water supply	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	92.5%	92%	91%	94%	94%	93%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	92.6%	92%	91%	94%	94%	92%	↔	92.6%	n/a
Anglian Water (2015 base sample: 401)	92.0%	92%	92%	92%	93%	91%	↔	↔	-2%
Dŵr Cymru Welsh Water (2015 base sample: 402)	95.2%	94%	92%	96%	95%	99%	↔	↔	+4%
Northumbrian Water (2015 base sample: 201)	94.8%	94%	94%	96%	95%	94%	↔	↔	-1%
Severn Trent Water (2015 base sample: 500)	93.4%	93%	90%	94%	94%	94%	↔	↔	=
South West Water (2015 base sample: 401)	90.4%	86%	86%	92%	93%	93%	↑	↔	-1%
Southern Water (2015 base sample: 201)	89.5%	92%	87%	91%	92%	87%	↔	↔	-4%
Thames Water (2015 base sample: 200)	91.5%	90%	92%	92%	93%	89%	↔	↔	-4%
United Utilities (2015 base sample: 401)	92.4%	89%	93%	95%	94%	92%	↔	↔	-2%
Wessex Water (2015 base sample: 500)	93.4%	94%	93%	93%	95%	93%	↔	↔	-2%
Yorkshire Water (2015 base sample: 400)	94.3%	95%	89%	95%	96%	95%	↔	↔	-1%

5.1.18 The WoC average for 2015 is 93%; South Staffordshire Water has the highest satisfaction (98%), with Affinity Water Southeast the lowest (88%).

5.1.19 There is a five-year upward trend for South Staffordshire Water.

Figure 67: Overall satisfaction with water supply - WoCs

Overall satisfaction with water supply	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	92.5%	92%	91%	94%	94%	93%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	91.9%	91%	89%	93%	93%	93%	↔	91.9%	n/a
Affinity Water Central (2015 base sample: 250)	90.7%	88%	88%	91%	95%	93%	↔	↔	-2%
Affinity Water East (2015 base sample: 200)	90.2%	92%	84%	89%	97%	92%	↔	↔	-5%
Affinity Water Southeast (2015 base sample: 200)	89.7%	89%	91%	89%	91%	88%	↔	↔	-3%
Bournemouth Water (2015 base sample: 350)	93.4%	96%	87%	95%	94%	95%	↔	↔	+1%
Bristol Water (2015 base sample: 150)	93.3%	93%	90%	95%	94%	95%	↔	↔	+1%
Cambridge Water (2015 base sample: 150)	94.1%	96%	92%	96%	94%	93%	↔	↔	-1%
Dee Valley Water (2015 base sample: 150)	93.5%	93%	93%	91%	99%	91%	↔	↔	-8%
Essex & Suffolk Water (2015 base sample: 150)	93.1%	93%	91%	95%	91%	92%	↔	↔	+1%
Hartlepool Water (2015 base sample: 154)	94.9%	96%	91%	95%	98%	96%	↔	↔	-2%
Portsmouth Water (2015 base sample: 151)	92.8%	96%	87%	93%	94%	95%	↔	↔	+1%
South East Water (2015 base sample: 149)	90.0%	90%	88%	91%	91%	90%	↔	↔	-1%
South Staffs Water (2015 base sample: 151)	91.9%	88%	88%	96%	93%	98%	↑	↔	+5%
Sutton & East Surrey Water (2015 base sample: 152)	93.0%	93%	90%	94%	96%	94%	↔	↔	-2%

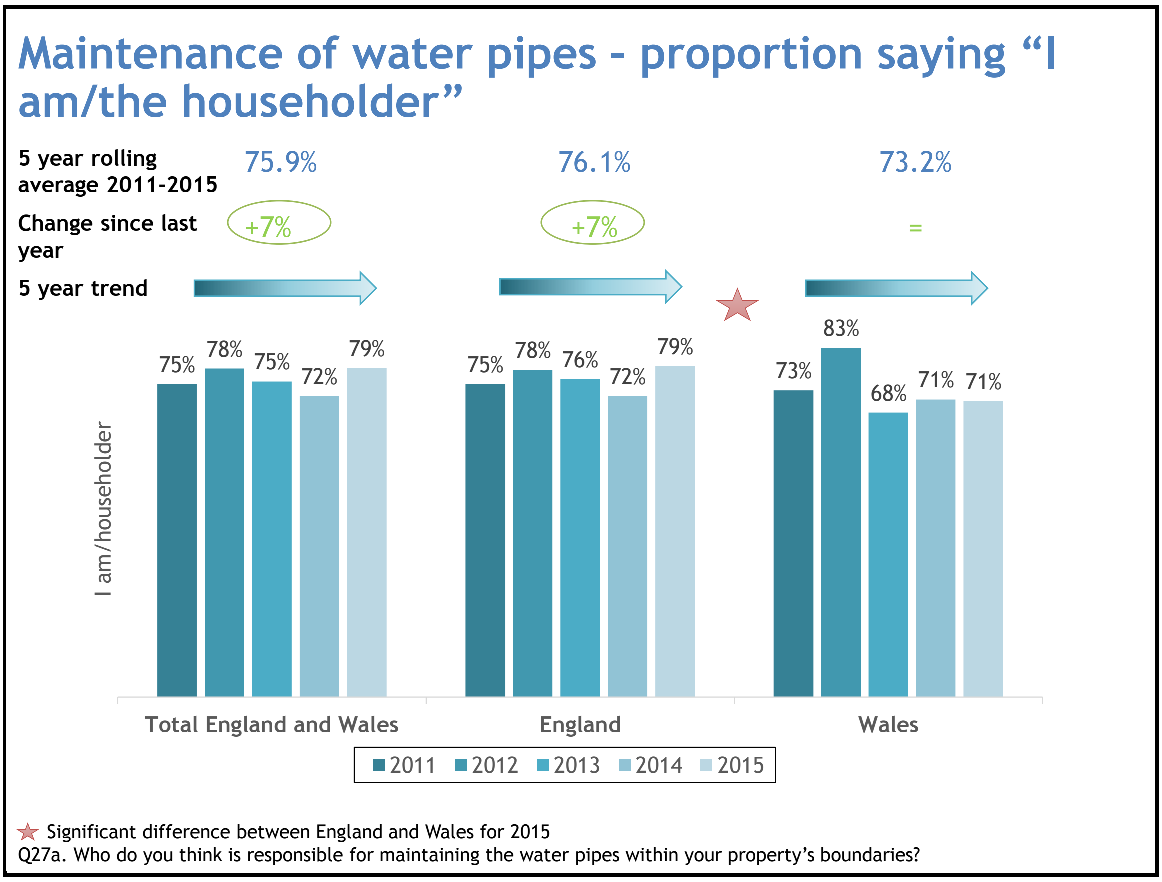
5.2 Maintenance of water pipes

5.2.1 Awareness amongst homeowners of their responsibility for maintaining water supply pipes within the boundary of the property has increased significantly since 2014. This has been driven by a significant rise in awareness in England. Four-fifths of homeowners now correctly identify themselves as being responsible (79%), leaving 21% either thinking that someone else has the responsibility or not knowing at all.

5.2.2 Homeowner awareness has increased from 72% in 2014. Around one in eight homeowners still think mistakenly, that the water company is responsible (13% in 2015 compared to 17% in 2014).

5.2.3 Consumers in Wales are significantly less likely to know that they are responsible for the maintenance of water pipes than those in England this year (79% compared with 71% in 2015).

Figure 68: Homeowner awareness of their responsibility for the maintenance of water pipes



Sample base size: All homeowners (4428)

5.2.4 The WaSC average for 2015 is 78%. Homeowner customers of South West Water are most likely to know they're responsible (87%), and those of Welsh Water are least likely (71%). There have been significant increases in awareness of householder responsibility from 2014 to 2015 for three WaSCs, namely Severn Trent Water (from 66% in 2014 to 81% in 2015), Southern Water (from 73% to 85%) and United Utilities (from 67% to 77%).

Figure 69: Homeowner awareness of their responsibility for the maintenance of water pipes - WaSCs

Home owner awareness of their responsibility for the maintenance of water pipes	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 4428)	75.9%	75%	78%	75%	72%	79%	↔	n/a	n/a
Total WaSCs (2015 base sample: 2656)	75.3%	75%	78%	75%	70%	78%	↔	75.3%	n/a
Anglian Water (2015 base sample: 314)	79.5%	77%	77%	79%	80%	83%	↔	↔	+3%
Dŵr Cymru Welsh Water (2015 base sample: 317)	73.6%	74%	84%	68%	73%	71%	↔	↔	-2%
Northumbrian Water (2015 base sample: 139)	73.9%	78%	74%	74%	67%	76%	↔	↔	+8%
Severn Trent Water (2015 base sample: 348)	76.1%	74%	82%	76%	66%	81%	↔	↔	+15%
South West Water (2015 base sample: 302)	80.9%	78%	73%	82%	85%	87%	↔	↑	+2%
Southern Water (2015 base sample: 144)	77.4%	80%	71%	76%	73%	85%	↔	↔	+12%
Thames Water (2015 base sample: 126)	73.2%	74%	79%	74%	65%	72%	↔	↔	+7%
United Utilities (2015 base sample: 313)	74.2%	71%	77%	78%	67%	77%	↔	↔	+10%
Wessex Water (2015 base sample: 367)	74.5%	73%	77%	72%	74%	76%	↔	↔	+2%
Yorkshire Water (2015 base sample: 286)	74.0%	75%	76%	71%	71%	76%	↔	↔	+5%

5.2.5 The 2015 WoC average is 81%. Homeowner customers of Bournemouth Water are most likely to know they're responsible (88%), whereas homeowner customers of Hartlepool Water are least likely (67%). There have been significant increases in awareness since 2014 for four WoCs, namely Dee Valley Water, Hartlepool Water, South Staffs Water and Sutton & East Surrey Water.

Figure 70: Homeowner awareness of their responsibility for the maintenance of water pipes - WoCs

Home owner awareness of their responsibility for the maintenance of water pipes	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 4428)	75.9%	75%	78%	75%	72%	79%	↔	n/a	n/a
Total WoCs (2015 base sample: 1772)	77.9%	74%	81%	76%	77%	81%	↔	77.9%	n/a
Affinity Water Central (2015 base sample: 180)	76.9%	75%	85%	71%	76%	79%	↔	↔	+3%
Affinity Water East (2015 base sample: 161)	79.4%	81%	81%	79%	76%	80%	↔	↔	+3%
Affinity Water Southeast (2015 base sample: 159)	78.4%	72%	73%	77%	87%	85%	↑	↔	-2%
Bournemouth Water (2015 base sample: 257)	80.1%	75%	85%	74%	79%	88%	↔	↔	+8%
Bristol Water (2015 base sample: 107)	73.7%	65%	79%	80%	71%	73%	↔	↔	+2%
Cambridge Water (2015 base sample: 105)	82.2%	81%	84%	78%	81%	86%	↔	↔	+4%
Dee Valley Water (2015 base sample: 116)	68.2%	71%	76%	70%	54%	69%	↔	↓	+15%
Essex & Suffolk Water (2015 base sample: 116)	79.9%	77%	78%	76%	82%	86%	↑	↔	+4%
Hartlepool Water (2015 base sample: 112)	62.4%	53%	64%	70%	56%	67%	↔	↓	+11%
Portsmouth Water (2015 base sample: 104)	78.5%	74%	86%	78%	75%	79%	↔	↔	+3%
South East Water (2015 base sample: 114)	80.9%	77%	80%	82%	84%	82%	↔	↔	-2%
South Staffs Water (2015 base sample: 121)	76.4%	73%	82%	73%	72%	82%	↔	↔	+10%
Sutton & East Surrey Water (2015 base sample: 120)	77.8%	76%	72%	79%	74%	87%	↔	↔	+13%

6 A sustainable, resilient sewerage system

This chapter outlines customers' satisfaction with various elements of the sewerage system, followed by their views on what is appropriate to dispose of via the sewerage system. Finally, the topic of responsibility for shared sewerage pipe maintenance is covered.

Key five-year trends

- Overall satisfaction with sewerage services has been stable for England and Wales over the last five years, although the trend for Wales is an upward one.
- The five-year trend is stable for all individual sewerage services except for maintenance of sewerage pipes and treatment works, which has experienced an upwards trend.
- Awareness that the responsibility for maintaining shared sewerage pipes lies with the sewerage companies is low at only one third. Two-thirds of homeowners either assume incorrectly or do not know who is responsible, which represents a stable five year trend.

Key changes since 2014

- Overall satisfaction with sewerage services is 91% - its highest level – and the same as in 2014.
- Satisfaction with each of four key aspects of sewerage services has remained stable or fallen since 2014; over 80% continue to be satisfied with each.
- Over four-fifths (85%) of customers are aware of what should and should not be disposed of down the toilet, sink or drain, up slightly from 82% in 2014.
- Those aware that the responsibility for maintaining shared sewerage pipes lies with the sewerage companies is little changed from 2014 (33% vs. 34% in 2014).

What's new in 2015

- Tissues (e.g. Kleenex) were removed from the list of possible objects that are acceptable to dispose of down the toilet, sink or drain. Results have been re-worked from previous years to include these in the "None of these" option.

6.1 Satisfaction with sewerage services

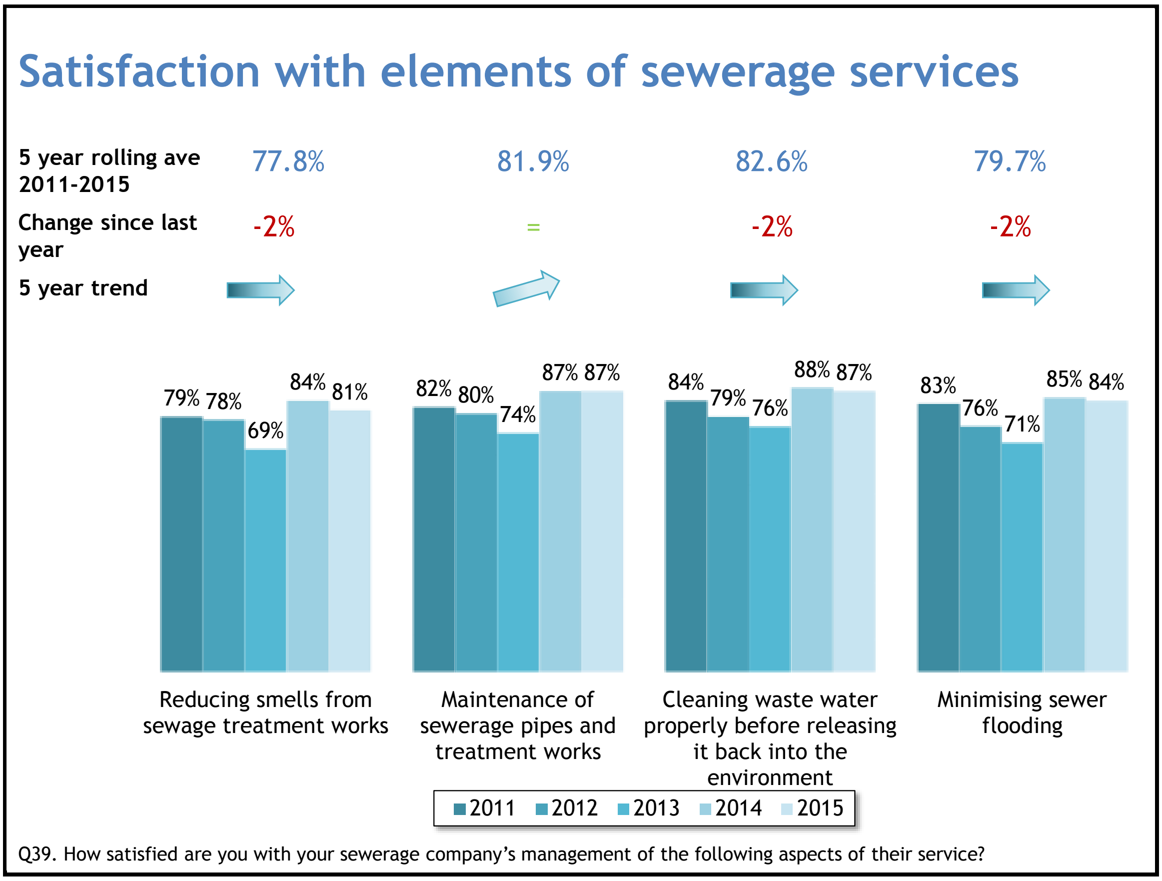
6.1.1 Around a fifth of customers were unable to give a view on the specific aspects of the sewerage service shown in Figure 71, slightly lower than in 2014.

6.1.2 Amongst those who did answer, satisfaction has dipped slightly from last year, but not significantly so as in 2013.

6.1.3 There is an upward five-year trend for satisfaction with the maintenance of sewerage pipes and treatment works - the only service area not experiencing a fall in satisfaction this year.

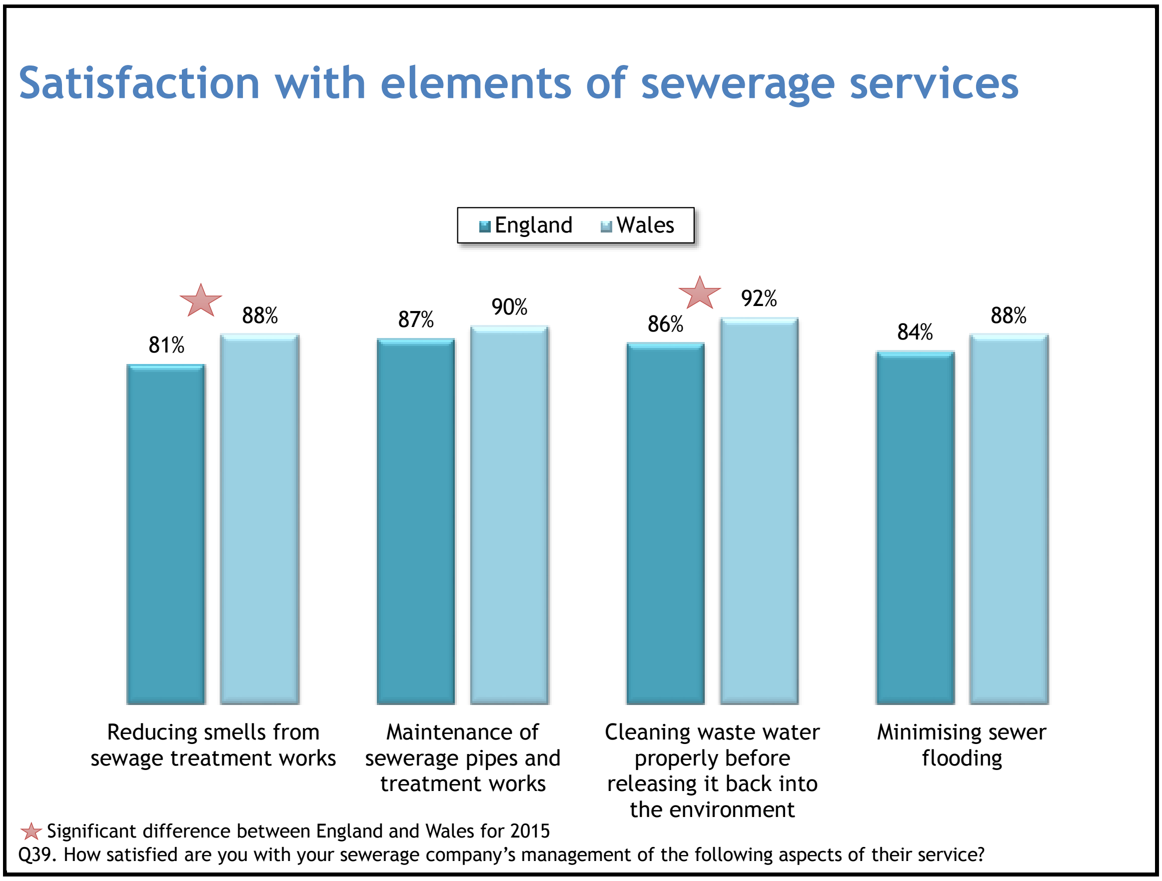
6.1.4 Fewer than 300 respondents (5%) are satisfied with their sewerage service, but dissatisfied with the value for money of it. The main reason for this dissatisfaction is that cost/prices have risen (54% of 291 respondents). Fewer respondents were satisfied with service, but dissatisfied with value for money this year (380/7% in 2014), however the main reason for this remains the same (67%).

Figure 71: Satisfaction with aspects of sewerage services



6.1.5 Customers in Wales are more satisfied than customers in England for all aspects of their sewerage services; significantly so for reducing smells from sewage treatment works and cleaning waste water properly before releasing it back into the environment.

Figure 72: Satisfaction with aspects of sewerage services - England v Wales



6.1.6 Figure 73 overleaf shows satisfaction in 2015 with each aspect of sewerage service by WaSC. It also shows the industry as a whole and WaSC average.

6.1.7 Welsh Water has the highest satisfaction levels, ranked top for three of the four service areas. Conversely, Southern Water is the lowest ranked WaSC in three of the areas.

6.1.8 There are some upward trends over the past five years for the individual aspects of sewerage service, as follows:

- Reducing smells from treatment works: upward trends for Welsh Water, United Utilities and Wessex Water.
- Maintenance of pipes: upward trends for WaSCs as a whole, Welsh Water, Severn Trent Water, Thames Water, United Utilities and Wessex Water.
- Cleaning waste water: upward trends for Welsh Water, United Utilities and Yorkshire Water.
- Minimising sewer flooding: upward trends for Welsh Water and United Utilities.

6.1.9 The only attribute to witness any significant change from 2014 to 2015 is satisfaction with the cleaning of waste water. There have been significant falls in satisfaction for South West Water (from 88% to 80%) and Southern Water (from 88% to 77%).

Figure 73: Satisfaction with aspects of sewerage services - WaSCs

	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning waste water properly before releasing it back into the environment	Minimising sewer flooding
Industry (2015 base sample: 5964)	81%	87%	87%	84%
Total WaSCs (2015 base sample: 3607)	82%	88%↑	87%	84%
Anglian Water (2015 base sample: 401)	82%	91%	89%	90%
Dŵr Cymru Welsh Water (2015 base sample: 402)	90%↑	91%↑	92%↑	88%↑
Northumbrian Water (2015 base sample: 201)	87%	91%	90%	87%
Severn Trent Water (2015 base sample: 500)	84%	89%↑	88%	87%
South West Water (2015 base sample: 401)	77%	81%	80%	73%
Southern Water (2015 base sample: 201)	75%	83%	77%	76%
Thames Water (2015 base sample: 200)	78%	86%↑	80%	77%
United Utilities (2015 base sample: 401)	81%↑	88%↑	90%↑	88%↑
Wessex Water (2015 base sample: 500)	86%↑	91%↑	89%	88%
Yorkshire Water (2015 base sample: 400)	82%	87%	91%↑	85%

The top and bottom rated WaSCs are highlighted by green and red text for each attribute.

6.1.10 Figure 74 overleaf shows satisfaction in 2015 with each aspect of sewerage service by WoC. It also shows the industry as a whole and WoC average. Please note that for WoCs, satisfaction with sewerage services may encompass more than one sewerage company – for example, Bournemouth Water's sewerage services are provided by Southern Water or Wessex Water.

6.1.11 Hartlepool Water ranks top on two out of four service areas (sewerage services provided by Northumbrian Water). Portsmouth Water ranks bottom on two aspects. Customers of Portsmouth Water receive their sewerage services from Southern Water, the lowest ranking WaSC in this area.

6.1.12 There are some upward trends over the past five years for the individual attributes, as follows:

- Reducing smells from treatment works: upward trends for Bournemouth Water and Hartlepool Water.
- Maintenance of pipes: upward trends for Bournemouth Water, Dee Valley Water and Hartlepool Water.
- Cleaning waste water: upward trends for Cambridge Water and Dee Valley Water.

- Minimising sewer flooding: upward trends for Bournemouth Water and Dee Valley Water.

6.1.13 As with the WaSCs, the only aspect of sewerage service to show a significant change from 2014 to 2015 is cleaning waste water. There have been significant decreases in satisfaction with this for Affinity Water Southeast (from 93% to 83%) and Affinity Water East (from 92% to 80%).

Figure 74: Satisfaction with aspects of sewerage services - WoCs

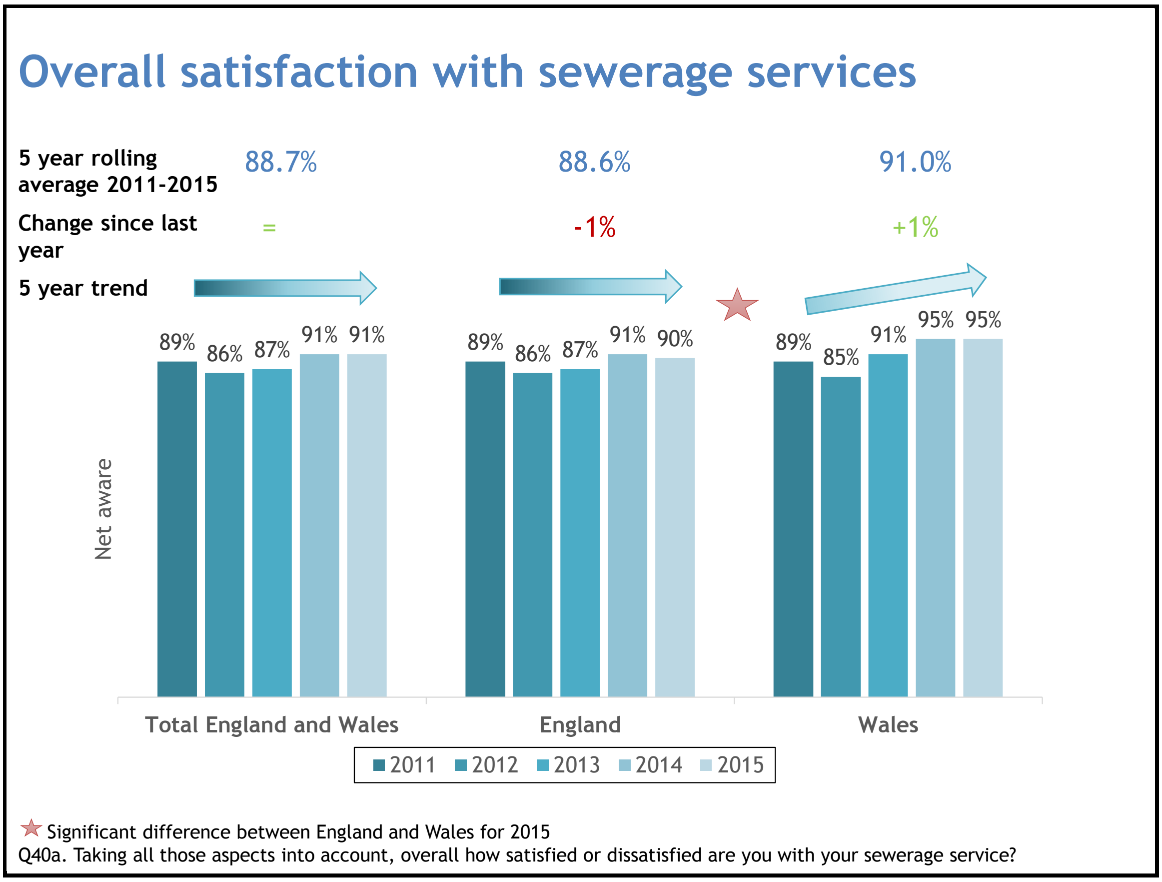
	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning waste water properly before releasing it back into the environment	Minimising sewer flooding
Industry (2015 base sample: 5964)	81%	87%	87%	84%
Total WoCs (2015 base sample: 2357)	79%	85%	86%	83%
Affinity Water Central (2015 base sample: 250)	79%	81%	86%	84%
Affinity Water East (2015 base sample: 200)	80%	82%	80%	82%
Affinity Water Southeast (2015 base sample: 200)	83%	86%	83%	80%
Bournemouth Water (2015 base sample: 350)	76% ↑	87% ↑	86%	82% ↑
Bristol Water (2015 base sample: 150)	85%	89%	92%	86%
Cambridge Water (2015 base sample: 150)	75%	84%	92% ↑	85%
Dee Valley Water (2015 base sample: 150)	75%	88% ↑	91% ↑	87% ↑
Essex & Suffolk Water (2015 base sample: 150)	76%	88%	85%	79%
Hartlepool Water (2015 base sample: 154)	88% ↑	92% ↑	85%	91%
Portsmouth Water (2015 base sample: 151)	77%	84%	77%	75%
South East Water (2015 base sample: 149)	79%	84%	82%	80%
South Staffs Water (2015 base sample: 151)	85%	89%	93%	87%
Sutton & East Surrey Water (2015 base sample: 152)	79%	85%	85%	82%

The top and bottom rated WoCs are highlighted by green and red text for each attribute.

6.1.14 Having looked at the four aspects of sewerage service, customers were asked for their overall satisfaction rating. As with the individual elements, satisfaction has remained stable overall.

6.1.15 Overall satisfaction with sewerage services is significantly higher in Wales than in England (95% compared to 90%) and there is an upward five-year trend in Wales. This is driven by upward trends for Welsh Water for all aspects of sewerage service and for three out of the four aspects of service for Dee Valley Water.

Figure 75: Overall satisfaction with sewerage services



6.1.16 The WaSC average for 2015 is 91%. Welsh Water has the highest satisfaction (96%), whilst South West Water and Southern Water have the lowest (85%).

6.1.17 There is a five-year upward trend for overall satisfaction with sewerage services for Welsh Water.

Figure 76: Overall satisfaction with sewerage services – WaSCs

Overall satisfaction with sewerage services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	88.7%	89%	86%	87%	91%	91%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	89.1%	89%	87%	88%	91%	91%	↔	89.1%	n/a
Anglian Water (2015 base sample: 401)	89.6%	87%	90%	86%	91%	92%	↔	↔	+2%
Dŵr Cymru Welsh Water (2015 base sample: 402)	91.7%	90%	85%	91%	95%	96%	↑	↔	+1%
Northumbrian Water (2015 base sample: 201)	90.6%	90%	90%	91%	90%	92%	↔	↔	+2%
Severn Trent Water (2015 base sample: 500)	91.8%	90%	91%	92%	92%	93%	↔	↔	=
South West Water (2015 base sample: 401)	83.9%	82%	77%	87%	89%	85%	↔	↔	-5%
Southern Water (2015 base sample: 201)	84.2%	85%	78%	86%	91%	85%	↔	↔	-5%
Thames Water (2015 base sample: 200)	86.1%	87%	86%	84%	88%	86%	↔	↔	-3%
United Utilities (2015 base sample: 401)	90.7%	90%	87%	89%	93%	93%	↔	↔	=
Wessex Water (2015 base sample: 500)	91.2%	89%	87%	90%	94%	93%	↔	↔	-1%
Yorkshire Water (2015 base sample: 400)	89.7%	94%	85%	87%	91%	92%	↔	↔	=

6.1.18 The WoC average for 2015 is 91%. Hartlepool Water (sewerage services provided by Northumbrian Water) has the highest satisfaction at 95% and Cambridge Water (sewerage services provided by Anglian Water) the lowest at 87%.

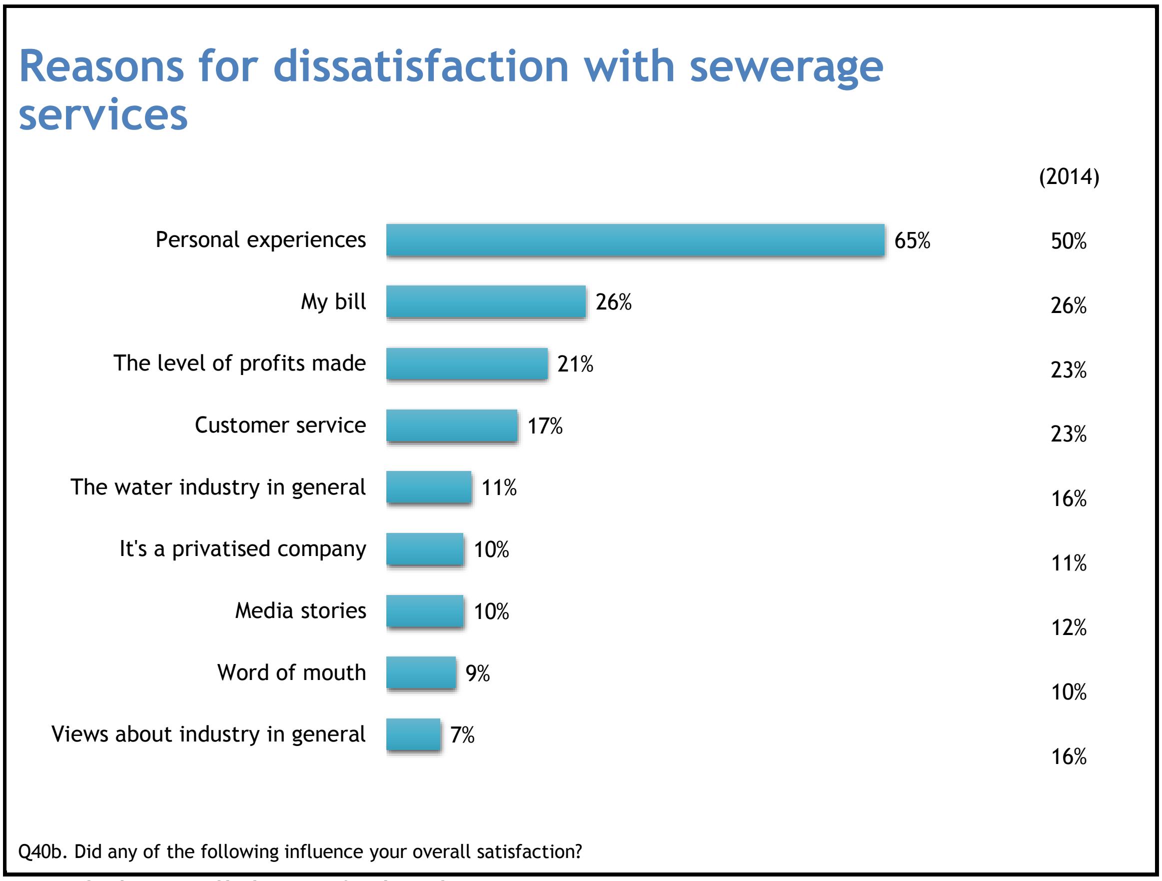
6.1.19 There is a five-year upward trend for Bournemouth Water (Southern Water or Wessex Water sewerage services), Hartlepool Water (Northumbrian Water) and South East Water (Southern Water or Thames Water).

Figure 77: Overall satisfaction with sewerage services - WoCs

Overall satisfaction with sewerage services	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	88.7%	89%	86%	87%	91%	91%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	87.6%	89%	83%	85%	91%	91%	↔	87.6%	n/a
Affinity Water Central (2015 base sample: 250)	85.7%	85%	81%	85%	89%	89%	↔	↔	+1%
Affinity Water East (2015 base sample: 200)	86.6%	88%	81%	81%	94%	89%	↔	↔	-5%
Affinity Water Southeast (2015 base sample: 200)	85.9%	81%	90%	78%	90%	88%	↔	↔	-1%
Bournemouth Water (2015 base sample: 350)	87.6%	87%	83%	83%	91%	91%	↑	↔	=
Bristol Water (2015 base sample: 150)	89.7%	91%	85%	88%	92%	91%	↔	↔	=
Cambridge Water (2015 base sample: 150)	89.4%	91%	89%	87%	94%	87%	↔	↔	-7%
Dee Valley Water (2015 base sample: 150)	88.6%	89%	87%	86%	93%	89%	↔	↔	-4%
Essex & Suffolk Water (2015 base sample: 150)	87.9%	91%	85%	88%	86%	91%	↔	↔	+5%
Hartlepool Water (2015 base sample: 154)	92.0%	90%	87%	93%	98%	95%	↑	↔	-3%
Portsmouth Water (2015 base sample: 151)	85.5%	85%	81%	85%	91%	88%	↔	↔	-4%
South East Water (2015 base sample: 149)	85.3%	84%	83%	82%	92%	91%	↑	↔	-2%
South Staffs Water (2015 base sample: 151)	89.0%	91%	84%	89%	90%	92%	↔	↔	+3%
Sutton & East Surrey Water (2015 base sample: 152)	87.7%	88%	86%	82%	92%	92%	↔	↔	=

6.1.20 The small number of dissatisfied customers (n=118) were asked whether any of the reasons in Figure 78 influenced their overall satisfaction. As was the case in 2013 and 2014, personal experiences (65%) and issues with the bill (26%) feature far more prominently than any negative perceptions of the water industry.

Figure 78: Reasons for dissatisfaction with sewerage services



Sample base: All dissatisfied with sewerage services (118)

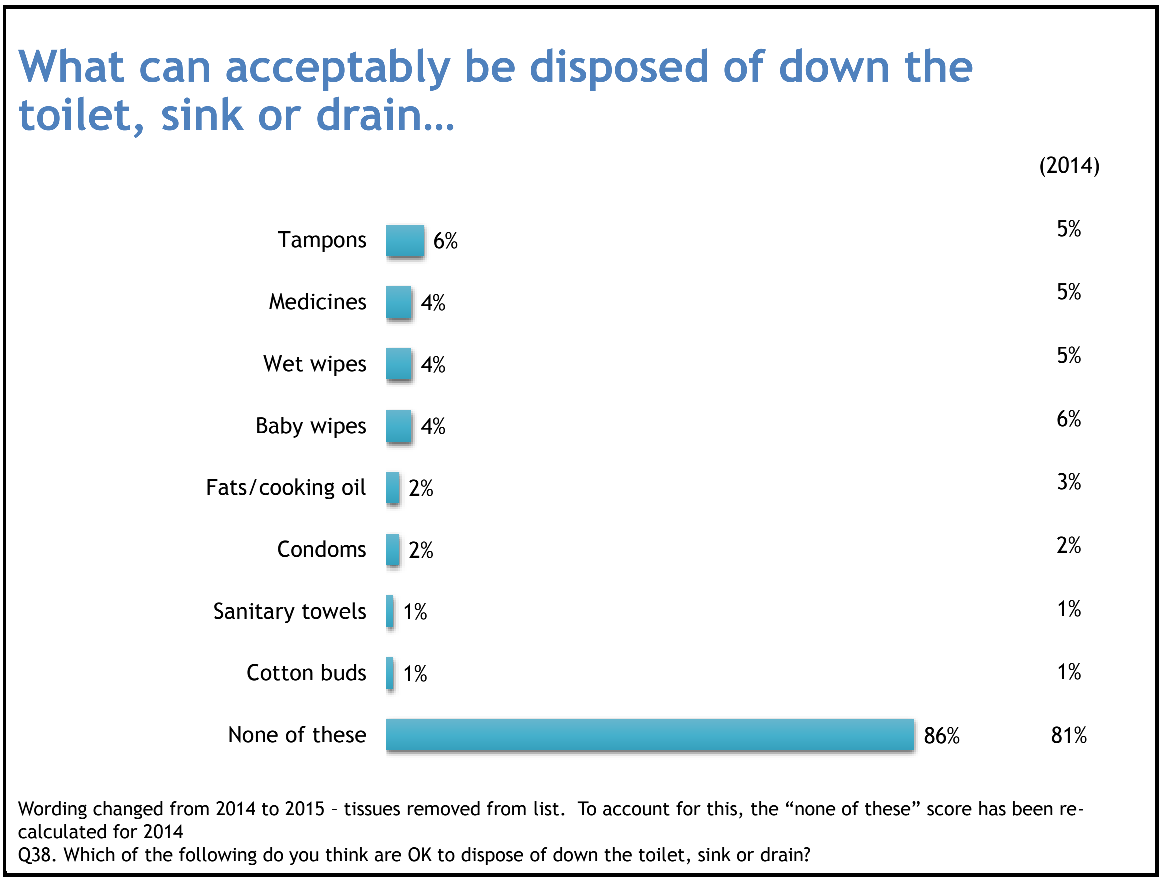
6.2 Disposing of waste: What not to flush?

6.2.1 Customers were prompted with a list of products and asked which, if any, can be disposed of down the toilet, sink or drain. Tissues were taken out of the list this year and data for previous years was adjusted to provide a like for like comparison. Any respondent who said only tissues and nothing else were added to the “none of these” category.

6.2.2 The majority of consumers know that it’s not acceptable to dispose of anything on the list below down the drain, toilet or sink (85%). Results are similar to 2014.

6.2.3 Results by country are also very similar this year, with only a 1% difference between those saying “none of these” in England (86%) and Wales (85%). Historically, customers in England are less likely to say “none of these” than customers in Wales (81% and 86% respectively in 2014).

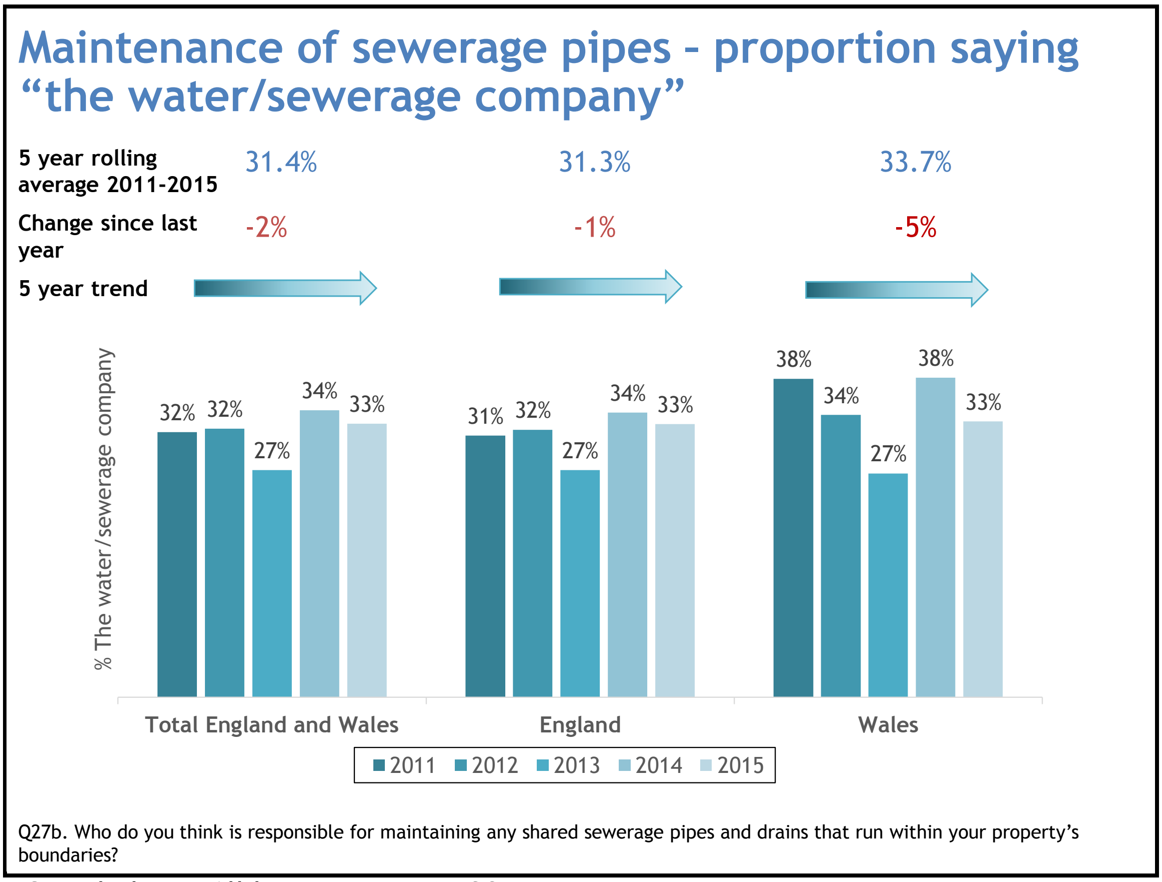
Figure 79: What can acceptably be disposed of down the toilet, sink or drain?



6.3 Responsibility for sewerage pipes

6.3.1 There is much more confusion amongst homeowners about responsibility for maintaining shared sewerage pipes than there is for water pipes. Only one third identified the water/sewerage company as responsible, meaning that two-thirds of homeowners either assume incorrectly or do not know who is responsible.

Figure 80: Maintenance of sewerage pipes



Sample base: All homeowners (4428)

6.3.2 The WaSC average for 2015 is 33%. Homeowner customers of Severn Trent Water are most likely to know the water company is responsible (38%), whereas homeowner customers of Anglian Water are least likely (30%). There has been a significant fall in awareness amongst Thames Water customers (from 44% to 32%).

Figure 81: Maintenance of sewerage pipes - WaSCs

Home owners knowing the water/sewerage company is responsible for shared pipes	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 4167)	31.4%	32%	32%	27%	34%	33%	↔	n/a	n/a
Total WaSCs (2015 base sample: 2483)	32.2%	32%	33%	28%	36%	33%	↔	32.2%	n/a
Anglian Water (2015 base sample: 288)	29.5%	36%	25%	31%	25%	30%	↔	↔	+5%
Dŵr Cymru Welsh Water (2015 base sample: 283)	33.5%	39%	34%	27%	38%	31%	↔	↔	-7%
Northumbrian Water (2015 base sample: 135)	31.1%	31%	34%	27%	32%	32%	↔	↔	=
Severn Trent Water (2015 base sample: 327)	35.3%	33%	39%	29%	38%	38%	↔	↔	=
South West Water (2015 base sample: 265)	28.5%	25%	35%	25%	27%	32%	↔	↔	+5%
Southern Water (2015 base sample: 136)	30.1%	36%	27%	23%	33%	32%	↔	↔	-1%
Thames Water (2015 base sample: 124)	31.5%	27%	36%	23%	44%	32%	↔	↔	-12%
United Utilities (2015 base sample: 298)	32.3%	30%	35%	30%	35%	32%	↔	↔	-2%
Wessex Water (2015 base sample: 347)	32.6%	38%	26%	30%	35%	35%	↔	↔	-1%
Yorkshire Water (2015 base sample: 280)	32.7%	31%	31%	30%	38%	35%	↔	↔	-2%

6.3.3 The WoC average for 2015 is 31%. Homeowner customers of Dee Valley Water are most likely to know the water/sewerage company is responsible (47%). Dee Valley Water also has an upward five-year trend. Homeowner customers of South Staffordshire Water are least likely to know the water/sewerage company is responsible (23%), a significantly lower proportion than in 2014 (37%).

Figure 82: Maintenance of sewerage pipes - WoCs

Home owners knowing the water/sewerage company is responsible for shared pipes	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 4167)	31.4%	32%	32%	27%	34%	33%	↔	n/a	n/a
Total WoCs (2015 base sample: 1684)	28.5%	31%	27%	26%	29%	31%	↔	28.5%	n/a
Affinity Water Central (2015 base sample: 170)	24.8%	29%	28%	18%	20%	29%	↔	↔	+9%
Affinity Water East (2015 base sample: 148)	24.0%	29%	27%	21%	19%	24%	↔	↔	+5%
Affinity Water Southeast (2015 base sample: 147)	27.3%	28%	30%	26%	24%	27%	↔	↔	+3%
Bournemouth Water (2015 base sample: 249)	24.5%	29%	22%	16%	30%	27%	↔	↔	-3%
Bristol Water (2015 base sample: 100)	35.7%	32%	37%	29%	36%	46%	↔	↑	+10%
Cambridge Water (2015 base sample: 102)	30.6%	28%	32%	29%	38%	26%	↔	↔	-11%
Dee Valley Water (2015 base sample: 102)	35.0%	29%	34%	27%	38%	47%	↑	↔	+9%
Essex & Suffolk Water (2015 base sample: 110)	28.6%	31%	27%	28%	29%	28%	↔	↔	-1%
Hartlepool Water (2015 base sample: 109)	34.4%	33%	31%	34%	30%	42%	↔	↔	+12%
Portsmouth Water (2015 base sample: 103)	31.0%	32%	19%	34%	36%	34%	↔	↔	-2%
South East Water (2015 base sample: 108)	28.5%	33%	22%	28%	27%	31%	↔	↔	+4%
South Staffs Water (2015 base sample: 119)	30.0%	32%	30%	30%	37%	23%	↔	↔	-14%
Sutton & East Surrey Water (2015 base sample: 117)	27.0%	27%	17%	27%	33%	29%	↔	↔	-4%

7 Comparison of service providers

This chapter compares customer views on water and sewerage service providers with other household service providers in terms of caring about the customer service they provide, trust and overall satisfaction with service and value for money.

Key five-year trends

- Water and sewerage service providers continue to be seen as more caring and trustworthy than energy suppliers.
- Whilst satisfaction with service for water suppliers (but not sewerage service providers) is still higher than for other utilities, the gap has narrowed considerably.

Key changes since 2014

- There have been significant falls in satisfaction with:
  - value for money for telephone landline and broadband services
  - service from broadband providers.

7.1 Comparison of perceptions that household service providers care about the service they deliver

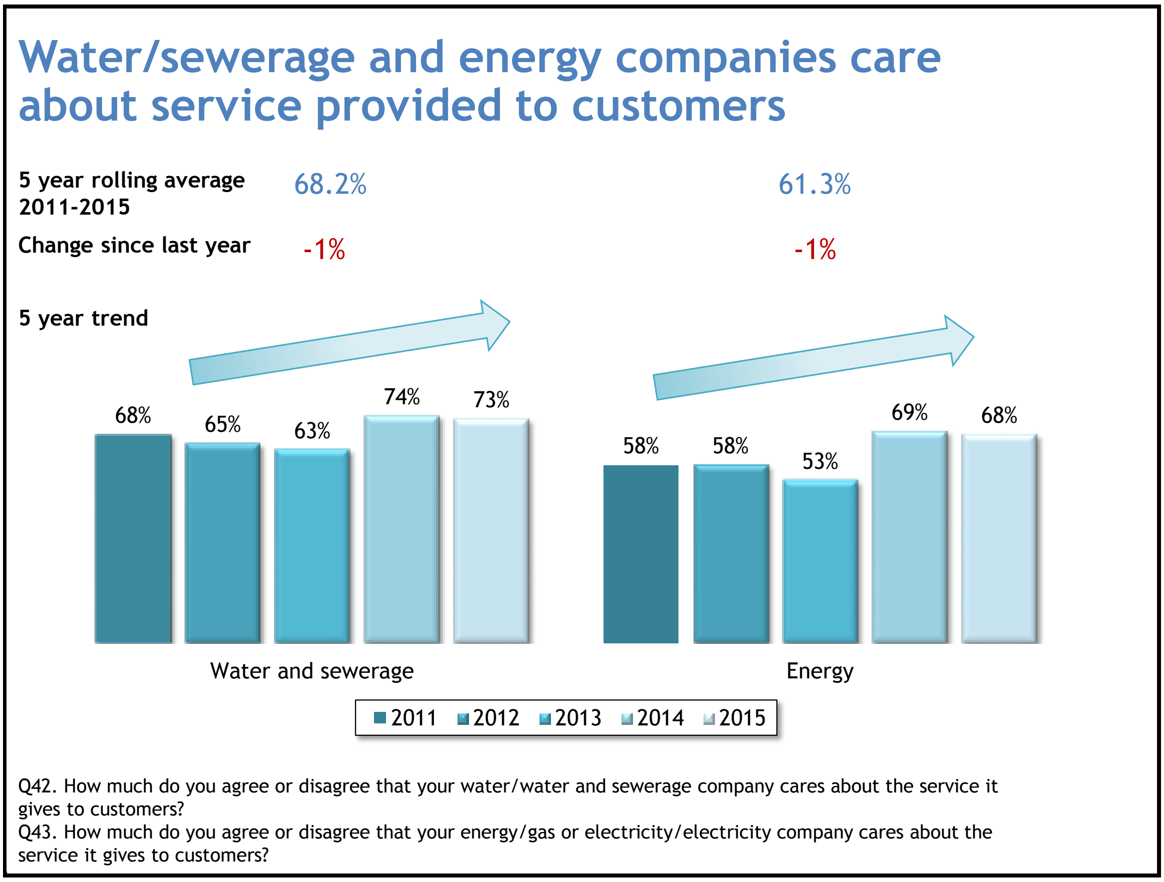
7.1.1 There is an upward five-year trend of perceptions that water and sewerage, and energy companies care about the service they provide to their customers.

7.1.2 Ratings for energy suppliers continue to be significantly behind water and sewerage companies.

7.1.3 Perceptions of care have fallen for both water companies and energy companies by 1% in 2015.

7.1.4 Customers in Wales are more likely to think that water and sewerage companies (78% compared to 72%), and energy companies care than customers in England (72% compared with 68%).

Figure 83: Water/sewerage and energy companies care about service provided to customers



7.2 Comparison of trust amongst household service providers

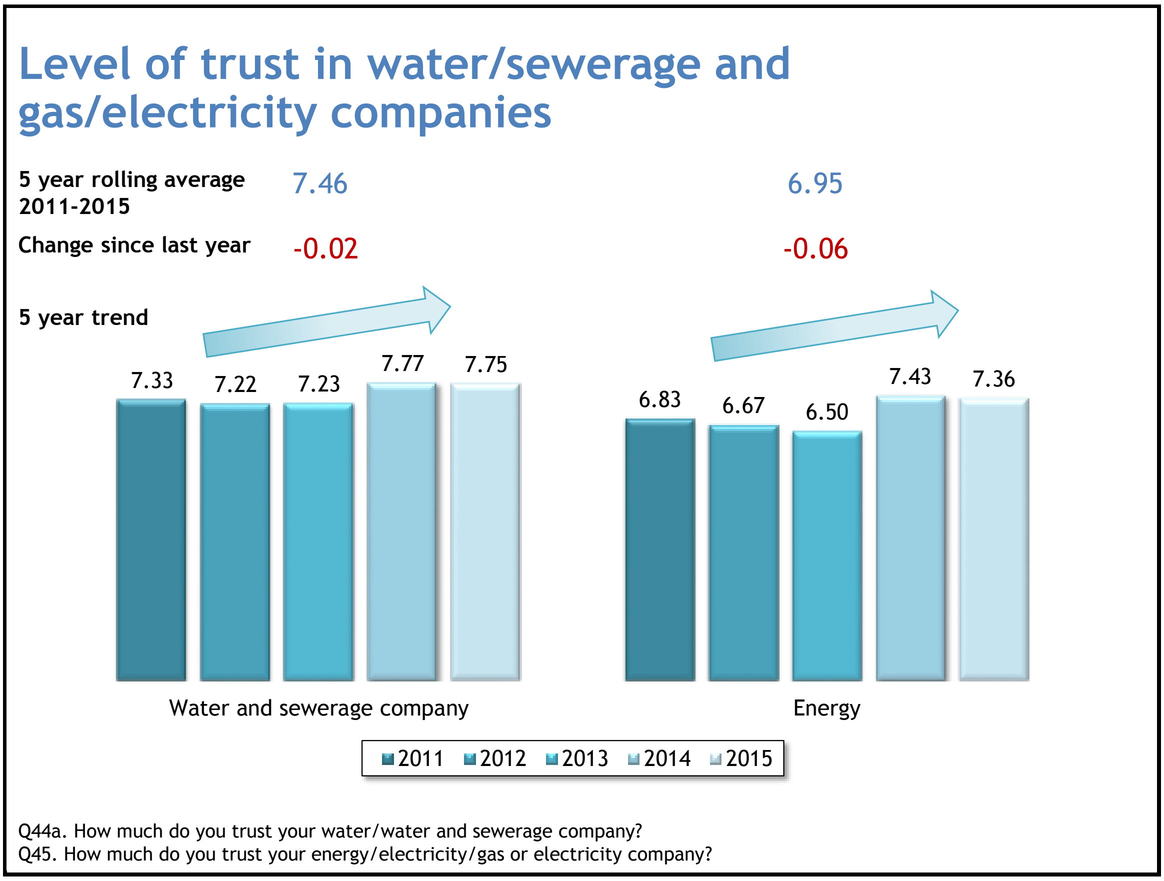
7.2.1 There is an upward five-year trend in the level of trust which customers have in both water and sewerage, and energy suppliers.

7.2.2 Trust in energy suppliers is still significantly lower than for water and sewerage companies.

7.2.3 And trust levels are little changed from 7.77 in 2014 to 7.75 in 2015 for water and sewerage companies and from 7.43 in 2014 to 7.36 in 2015 for energy suppliers.

7.2.4 As is the case with water and sewerage companies, customers in Wales are more likely to trust energy companies than customers in England (7.64 compared with 7.35).

Figure 84: Level of trust in water/sewerage and gas/electricity companies



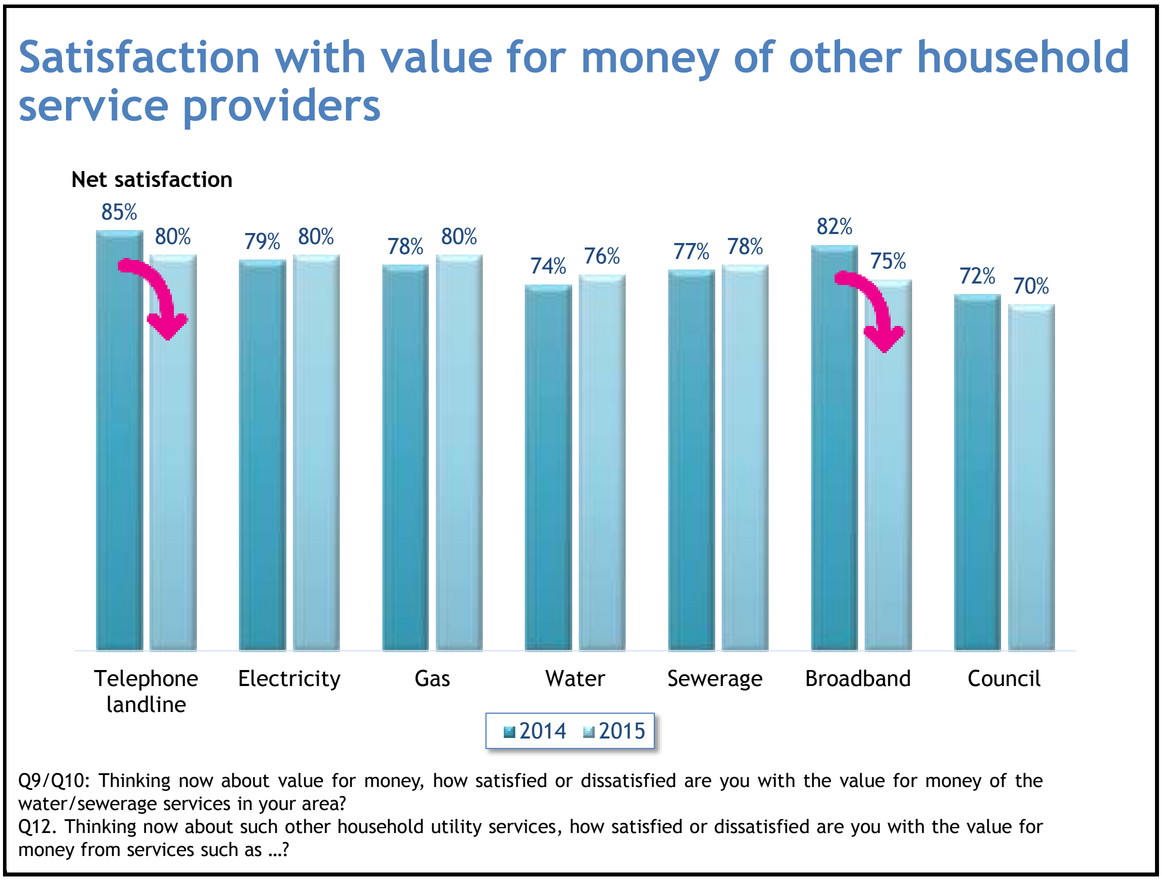
7.3 Comparison of value for money across household service providers

7.3.1 Customers were asked to rate their satisfaction with other household service providers.

7.3.2 The value for money of water and sewerage services is ranked four and fifth out of the seven services, ahead of only broadband and council services. Satisfaction with the value for money of gas, electricity and landline services are all 4% higher than for water and 2% than for sewerage services. However, they are not statistically different.

7.3.3 Satisfaction with the value for money of telecoms providers has fallen significantly since 2014 (for both telephone landline and broadband providers).

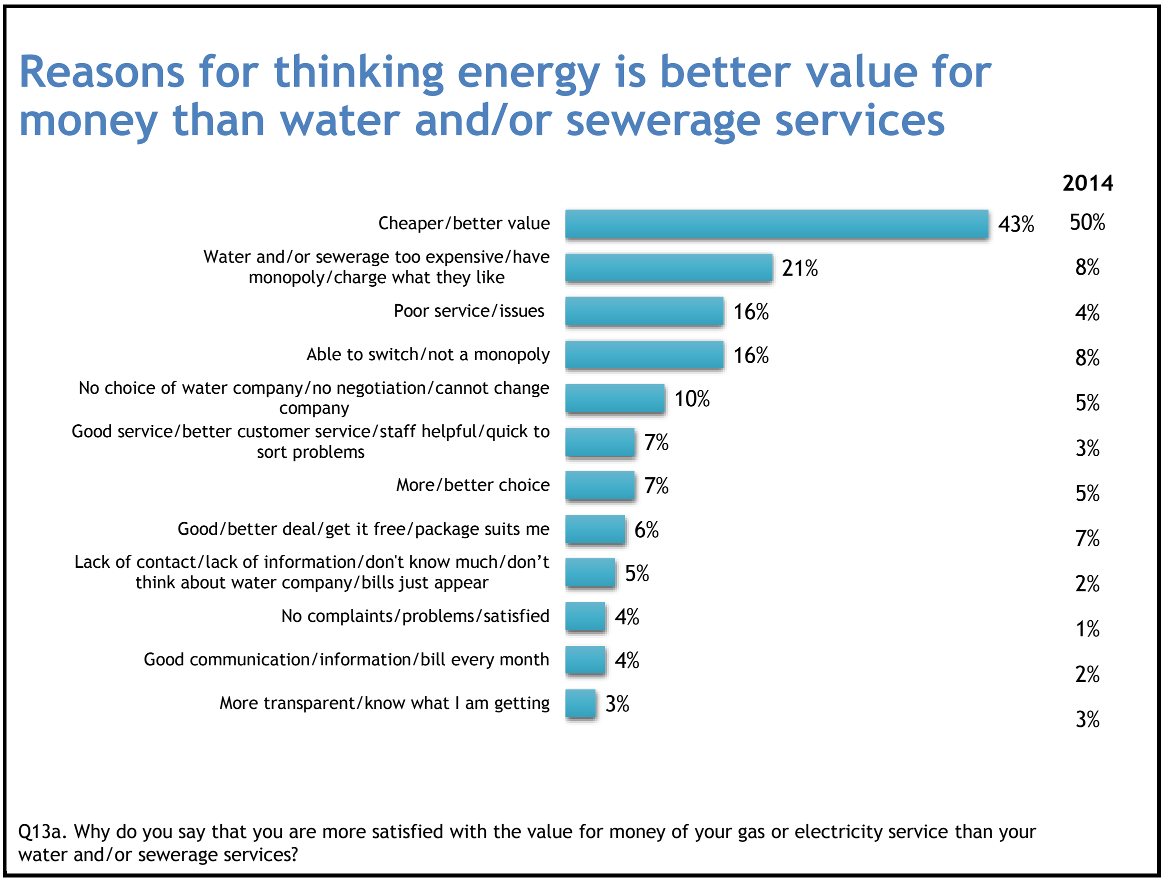
Figure 85: Satisfaction with value for money of other household service providers



7.3.4 Over two-fifths (43%) of respondents who are more satisfied with the value for money of their energy services than their water services think that energy is cheaper or simply better value for money. One fifth (21%) say that water companies are too expensive/charge what they like.

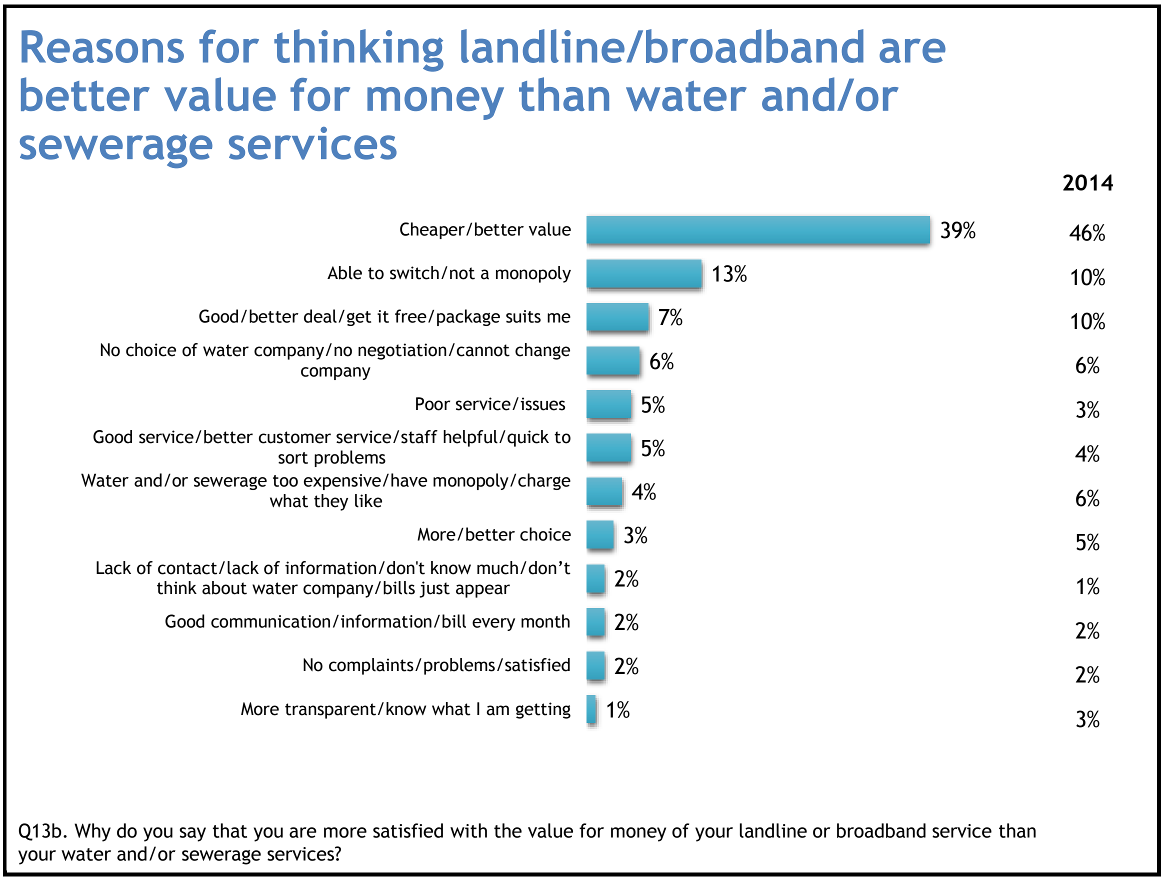
7.3.5 Significantly more respondents this year than in 2014 say they are more satisfied with energy because of poor service issues with water companies (16% compared with 4% in 2014) or because they are able to switch their energy provider (16% compared with 8% in 2014).

Figure 86: Reasons for thinking energy is better value for money than water services



7.3.6 Significantly fewer respondents this year than in 2014 say that the reason for being more satisfied with landline/broadband is because it is cheaper/better value (39% compared with 46% in 2014), although it remains the main reason, mentioned far more frequently than any other.

Figure 87: Reasons for thinking landline/broadband are better value for money than water services



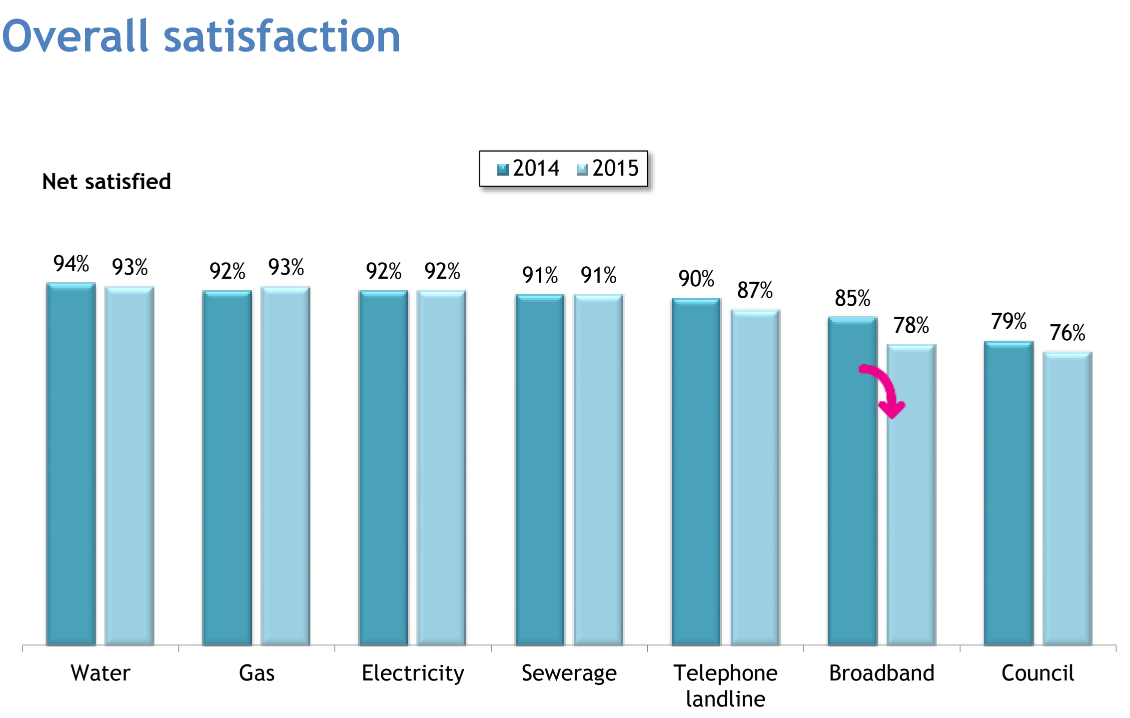
7.4 Comparison of service satisfaction across household service providers

7.4.1 Overall satisfaction with service provided by all suppliers is virtually unchanged since 2014, with broadband the only one which has decreased significantly.

7.4.2 Water and sewerage companies compare more favourably with other household service providers on service than they do on value for money.

7.4.3 Satisfaction with water services ranks as equal first with gas services (both 93%). Electricity is third at 92% and sewerage services fourth on 91%. Differences of +/- 1% are significant when comparing large base sizes, therefore most service providers are significantly different to the others (with the exception of water compared with gas services, and electricity compared with sewerage services).

Figure 88: Overall satisfaction with service providers



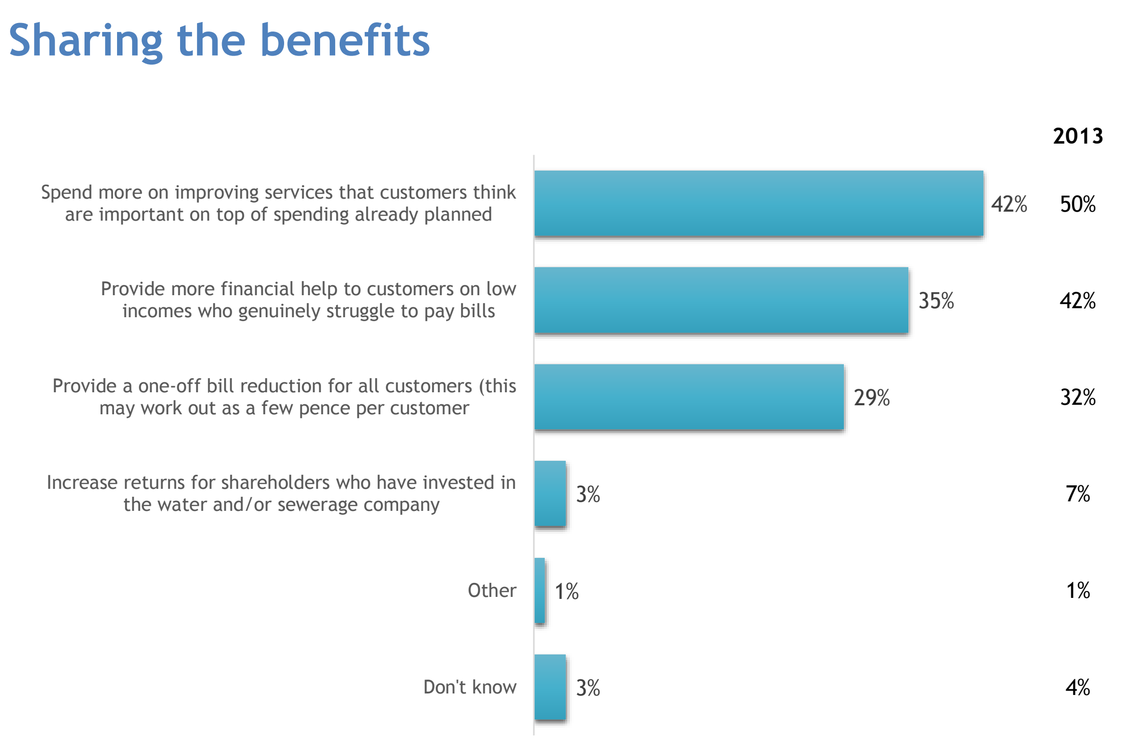
Q35/Q40a: Taking all of those aspects into account, overall how satisfied or dissatisfied are you with your water/sewerage service?
Q41. Now thinking about other household services you receive, how satisfied or dissatisfied are you with…?

7.5 Sharing the benefits

7.5.1 Asked previously in 2013 (but not in 2014), respondents were asked what their preference would be should companies perform better than expected and make more profit. Just over two-fifths (42%) would prefer companies to spend more on improving services that customers think are important on top of spending already planned, whilst a further one-third (35%) would rather they provide more financial help to customers on low incomes who genuinely struggle to pay bills and three in ten would rather they provide a one-off bill reduction for all customers (29%).

7.5.2 Significantly fewer respondents said they would like companies to spend more on improving services and provide more financial help to customers on low incomes than in 2014. However, care should be taken when comparing results with 2013 as the wording was changed slightly and "Reduction in price/cheaper bills/keep cost down" was removed from the prompted list.

Figure 89: Sharing the benefits



Please note that percentages add to more than 100% as respondents could choose more than one option.
Q54 Sometimes companies perform better than expected and therefore make more profit. If this happens, which of the following would you prefer them to do?

8 Perceptions of the Consumer Council for Water

This chapter looks at awareness and knowledge of CCWater, how people would go about contacting the organisation and the importance to customers of having a body to represent their interests.

Key five-year trends

- The five-year trend is stable with a rolling average figure of 73.0% saying it is absolutely essential or very important to have a consumer body representing their interests in the water industry.

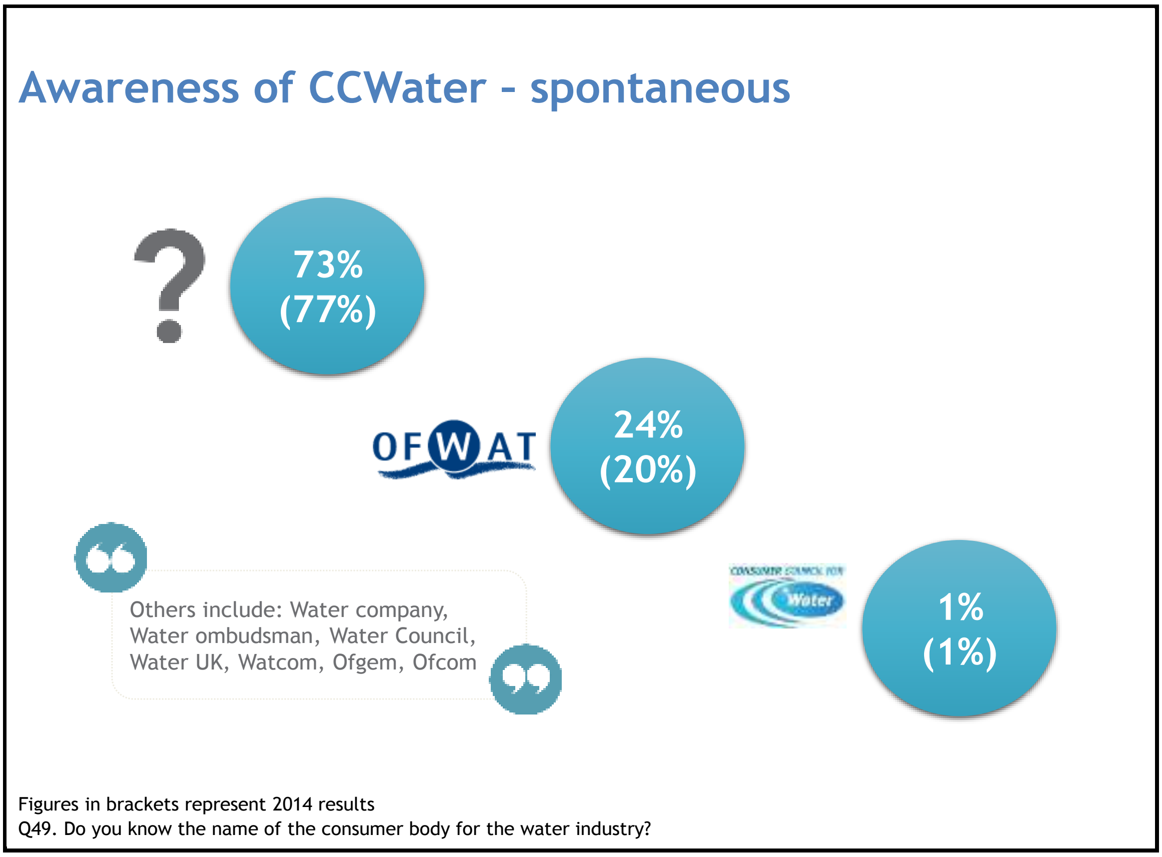
Key findings

- Although customers continue to know little about CCWater, most (71%) believe in the importance of having a body to protect their interests.
- Less than one in ten customers (7%) think it's not very or not at all important to have a consumer body in the water industry; this has remained unchanged since 2014 and 2013.
- As in 2014, most would look for CCWater's details using a search engine; paper sources are declining in importance.

8.1 Awareness of CCWater

8.1.1 Consistent with previous years, very few people are aware of CCWater. When asked the name of the consumer body for the water industry; far more people say Ofwat (24%) than CCWater (1%).

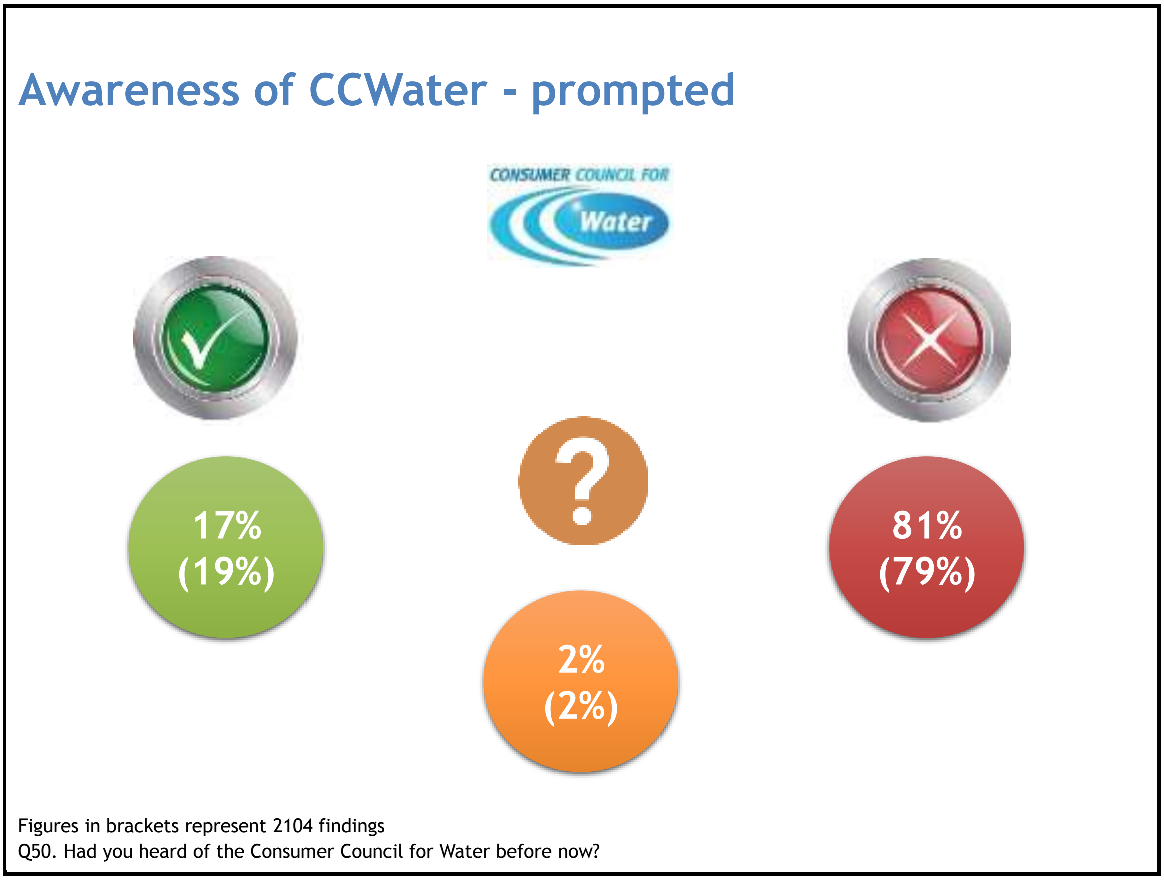
Figure 90: Spontaneous awareness of CCWater



8.1.2 However, when prompted with the name one in six (17%) say they have heard of the Consumer Council for Water, slightly fewer than in 2014 (19%).

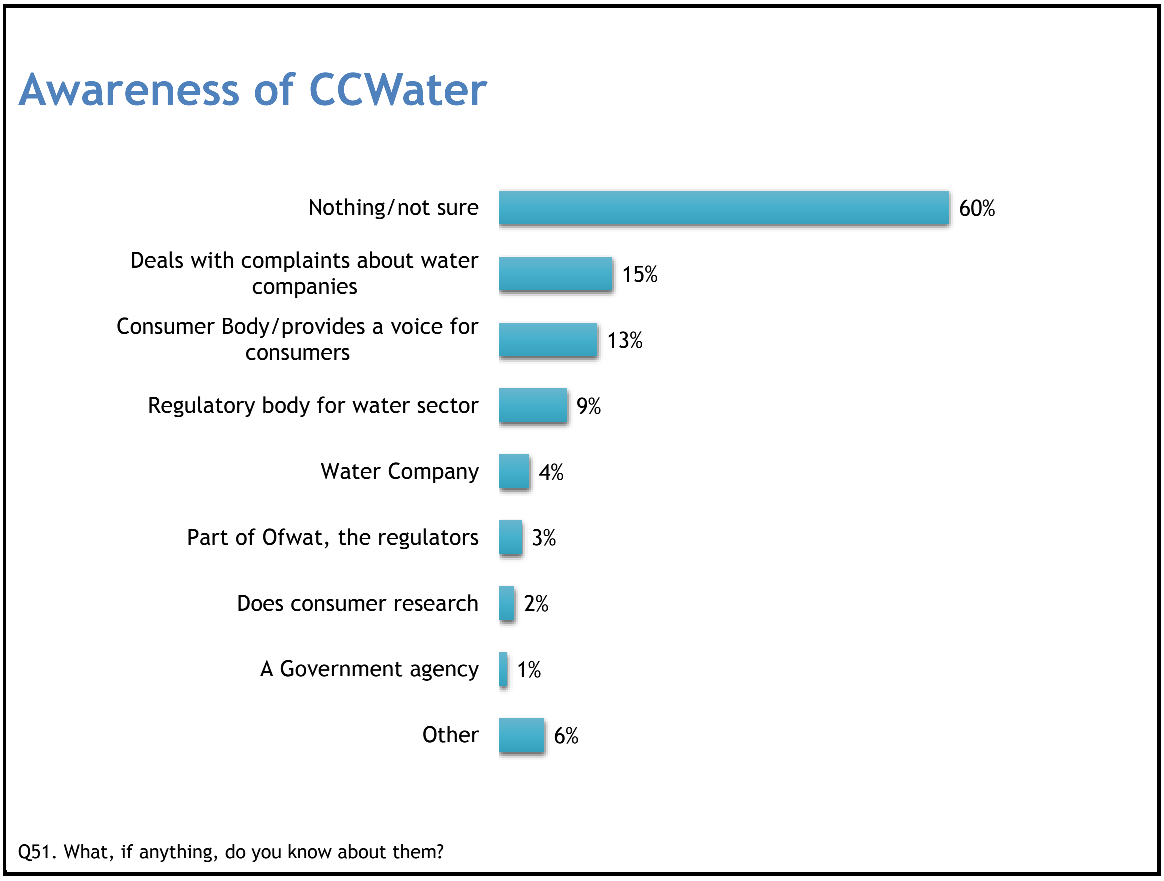
8.1.3 Awareness levels are virtually the same in England (17%) and in Wales (16%).

Figure 91: Prompted awareness of CCWater



8.1.4 The majority of those who have heard of CCWater know little about what it does (60%). However, around one in seven are correct in saying that it deals with complaints about water companies (15%) and it provides a voice for consumers (13%). It's difficult to say whether they know this as a fact or whether the earlier prompt causes them to make an educated guess.

Figure 92: Knowledge of CCWater

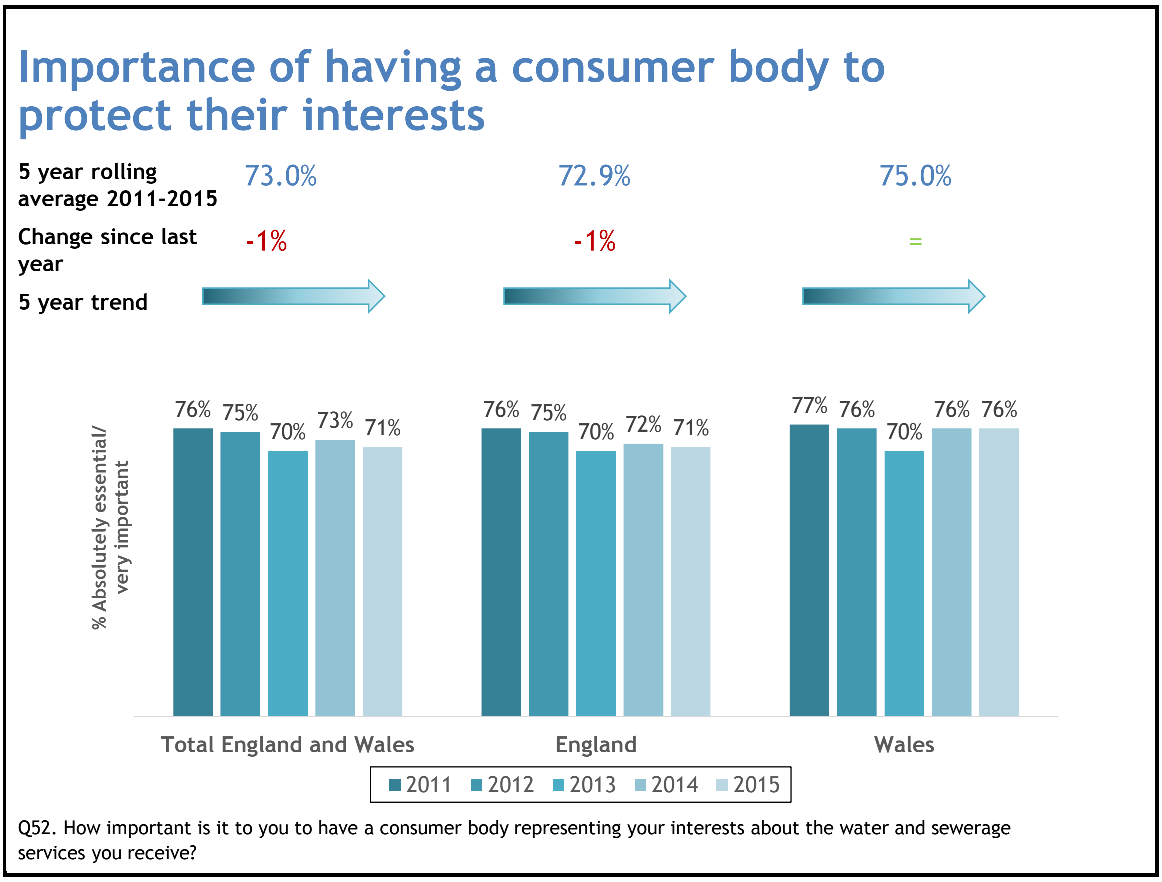


8.2 Importance of CCWater

8.2.1 Customers still feel it is important to have a consumer body to protect their interests (93% saying it is important to some degree; the same as in 2014). However, the proportion saying it is "absolutely essential" or "very important" has fallen slightly from 73% to 71% in 2015, which reverses the rise seen in 2014.

8.2.2 Customers in Wales are slightly more likely to say it's absolutely essential/important to have a consumer body to protect their interests (76%), compared with England (71%).

Figure 93: Importance of having a consumer body to protect their interests

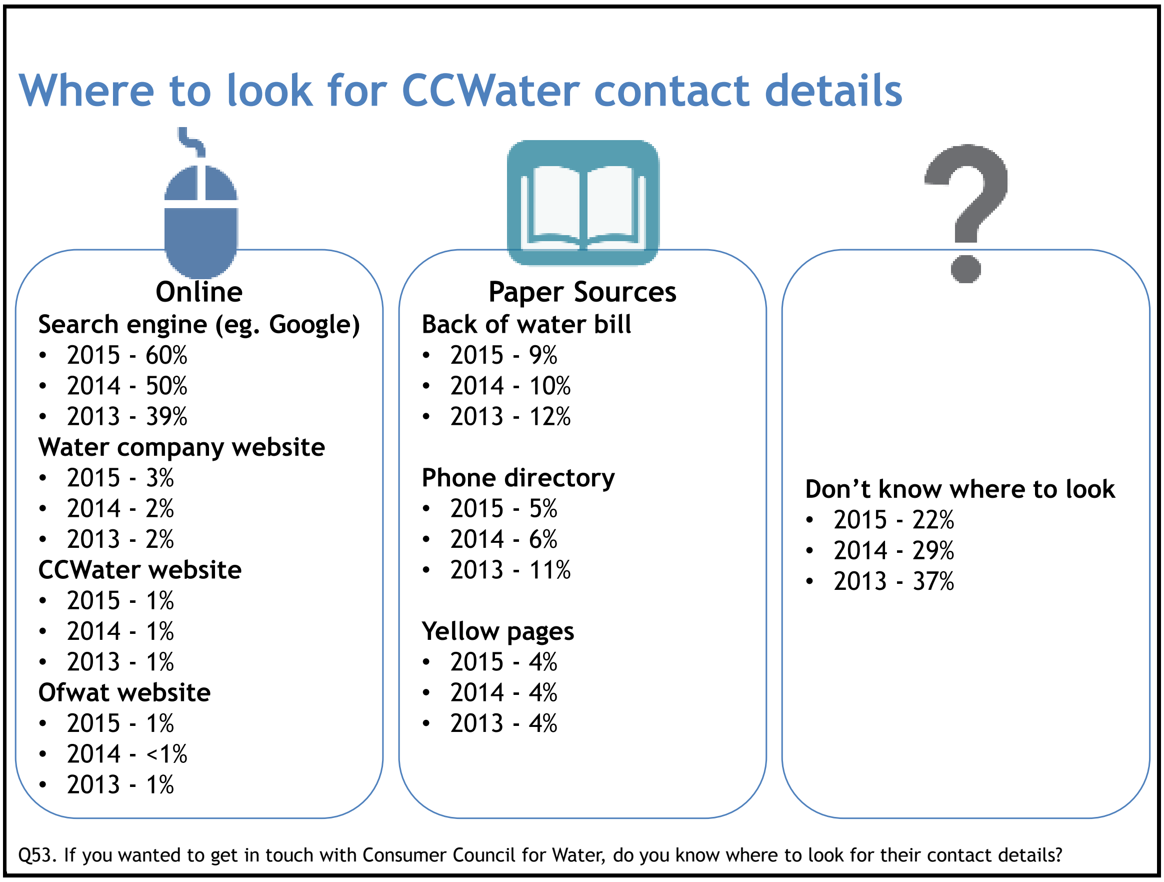


8.2.3 Over three-quarters (78%) say they would know where to look for CCWater's contact details, which is a significant improvement on 2014 (71%). The internet continues to be the main port of call and is increasing in importance, primarily via search engines such as Google (60% compared with 50% in 2014 and 39% in 2013). Paper sources, such as the back of a bill and telephone directories, are being used less.

8.2.4 Southern Water customers are by far the most knowledgeable, with 85% knowing where to look. This compares to 70% for Portsmouth Water, which has the highest proportion of WoC customers knowing where to look.

8.2.5 Respondents in the older age groups are less likely to know where to look for CCWater's contact details (24% 60-74 and 39% 75+, compared with 16% 18-29, 17% 30-44 and 19% 45-59 saying don't know). Households with a disability are also less likely to know where to look (28% compared with 21% amongst households who don't) and also households on benefits are less likely to know than those not on benefits (21% compared with 25% respectively).

Figure 94: Where to look for CCWater contact details



8.3 Value for money of CCWater

8.3.1 In 2014 customers were given information about CCWater's role (see Figure 84) and told that about 21 pence per year is added to their water bill for the service provided. They were asked how satisfied they are with this amount in terms of value for money and over four fifths (87%) agreed that the service was good value for money.

8.3.2 A similar proportion (85%) agrees that the service is good value for money in 2015, slightly lower than last year (87%). Over half (53%) continue to be very satisfied (55% in 2014).

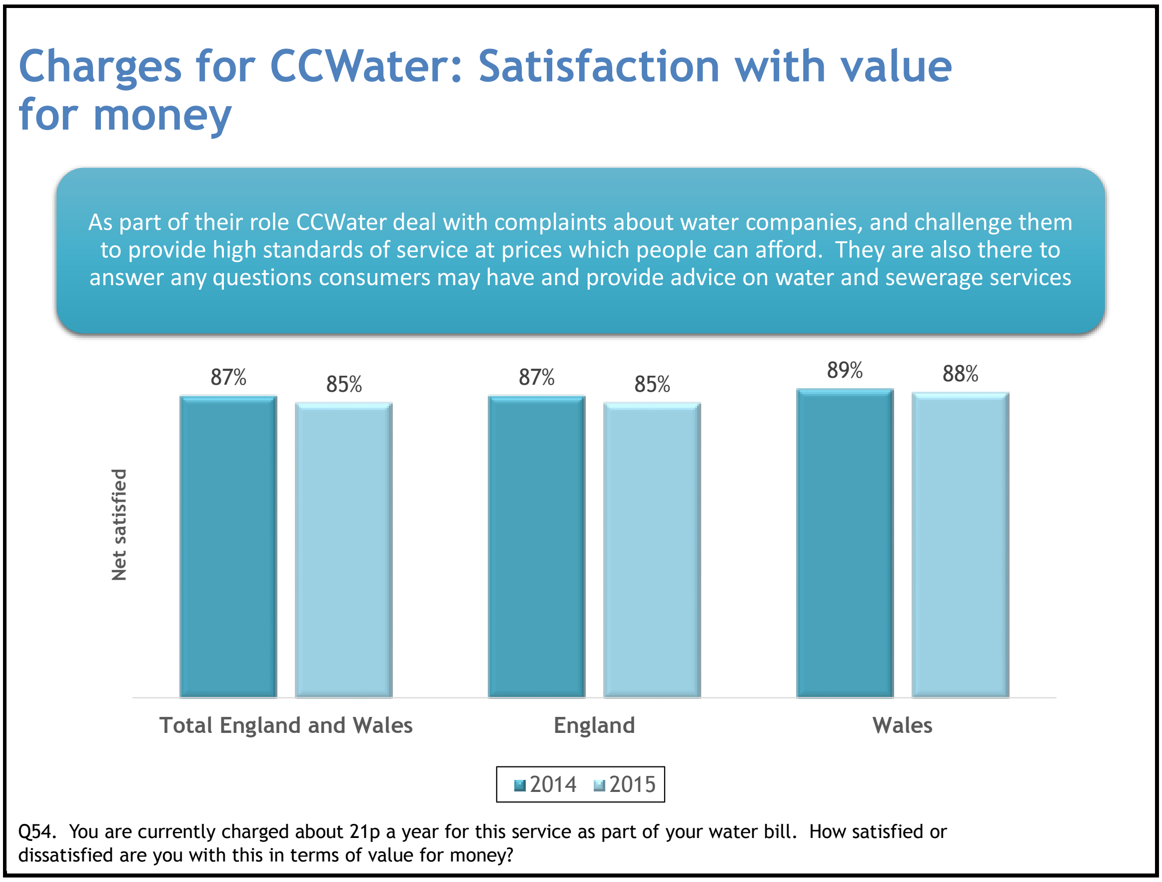
8.3.3 Customers in Wales are slightly more likely than those in England to agree that the service is good value for money (88% compared with 85%).

8.3.4 The WaSC average for 2015 is 85% satisfied. Welsh Water customers are most satisfied (88%) and South West Water customers are least satisfied (80%).

8.3.5 The WoC average for 2015 is 86% satisfied. South Staffordshire Water customers are most satisfied (90%) and Affinity Water Southeast customers are least satisfied (81%).

8.3.6 There is a correlation between overall satisfaction with water and sewerage services and satisfaction with the 21 pence charge (82% of customers satisfied with their water and 84% their sewerage supply compared to 65% and 53% of those not).

Figure 95: Satisfaction with value for money of CCWater



9 Comparisons of customer views in England and in Wales

This chapter summarises the findings on key measures across England and Wales[16] in the same order as the main body of the report. Views for Wales are based on customers receiving water services from Welsh Water and Dee Valley Water and sewerage services from Welsh Water. Therefore, Welsh views are based on one or two companies as opposed to England, where there are 21 companies (9 WaSCs and 12 WoCs). The sample size for England is 5611 (5417 unweighted) and for Wales is 353 (547 unweighted).

9.1 Speaking up for water consumers

9.1.1 Customers in Wales are significantly more likely to agree that water companies care about the service they provide than customers in England (78% compared with 72%). There is a five-year upward trend for both countries.

9.1.2 Levels of trust are significantly higher in Wales than England (8.07 out of 10 compared with 7.73 respectively), although both countries have a five-year upward trend.

9.1.3 Customers in Wales are significantly more likely to recommend their water company to family and friends, with 52% rating 9 or 10 (promoters), compared to 41% for England.

9.1.4 Wales also has a higher Net Promoter Score (NPS) than England (+37 compared to +16).

9.2 Value for money

9.2.1 In 2015, satisfaction with value for money of water services is significantly higher in Wales, whereas a year ago England and Wales were on a par. This is due to a notable rise in satisfaction amongst Welsh customers since 2014 (82% from 76% in 2014). There is an upward five-year trend for both countries.

9.2.2 The same is true for sewerage services, with an upward five-year trend for both England and Wales. Satisfaction with value for money in Wales is significantly higher than in England due to a notable rise of 7% in the satisfaction levels of Welsh customers.

9.2.3 Perceptions of fairness and affordability are similar across the two countries.

9.3 Consumer rights and responsibilities

9.3.1 Awareness of WaterSure/Welsh Water Assist tariff in Wales is significantly higher than awareness of the WaterSure tariff in England (13% and 8% respectively), and Wales has witnessed an upward five-year trend (England's five-year trend is stable).

9.3.2 Although awareness of additional services, such as large print or braille bills, passwords etc. remains lower in Wales (47%) than in England (51%), the difference is not significant, and both countries have an upward five-year trend.

9.3.3 Similar proportions of unmetered customers in both countries are aware that they can request a meter to be fitted free of charge (67% in England compared to 69% in Wales) but this is

[16] For analysis purposes, the nation of Wales comprises customers of Welsh Water and Dee Valley Water for water services, and customers of Welsh Water for sewerage services. A few of these customers live just over the border in England, but as they get their water and/or sewerage services from a company based in Wales they are included in the analysis for Wales rather than England.

significantly higher for England than in 2014 (59% for England in 2014). Although there is no difference in awareness between English and Welsh customers about the 12/24 month trial period (34% England, 35% Wales), the five-year awareness trend is downward for Wales and stable for England.

9.3.4 Awareness of the Guaranteed Standards Scheme (GSS) scheme to compensate for service failure is slightly higher in Wales (55%) than in England (50%), and both countries have seen a significant increase in awareness since 2014 (43% and 42% respectively), and the five-year trend for Wales is an upward one (England stable).

9.3.5 There is a downward five-year trend for customers in Wales likely to contact their water/sewerage company if they are worried about paying their bill (80% 2011, 72% 2012, 65% 2013, 77% 2014, 69% 2015).

9.3.6 The proportions of customers contacting their water provider are the same across England and Wales (16%).

9.3.7 Although satisfaction with contact handling is similar for both countries in 2015 (83% Wales, 81% England), there has been an upward five-year trend for England, where the five-year trend for Wales is stable.

9.3.8 Awareness of the rainwater drainage rebate is similar in England and in Wales this year following a notable increase in Wales since 2014 (Wales 11% in 2014, 17% 2015; England 17% in 2014, 19% 2015).

9.4 Water on tap

9.4.1 Customers in Wales are significantly more satisfied with their water supply than those in England for four out of six aspects of their water supply service. The significant differences, with the exception of water supply pressure, relate to the water itself rather than its delivery. The biggest difference concerns the hardness/softness of water, where nearly all Welsh customers (92%) compared to seven in ten English customers (70%) are satisfied.

9.4.2 The same very high levels of overall satisfaction are seen for England and Wales, however, customers in Wales are significantly more satisfied in 2015 (98% compared to 92% in England).

9.4.3 Significantly more homeowners in England correctly think that they are responsible for the maintenance of the water pipes within their boundaries (79% compared to 71% in Wales).

9.5 A sustainable, resilient sewerage system

9.5.1 Customers in Wales are significantly more satisfied than those in England with two aspects of their sewerage service - the reduction of smells from sewage treatment works (88% and 81% respectively) and the cleaning of waste water before it is released back into the environment (92% and 86% respectively).

9.5.2 Customers in Wales are also significantly more satisfied overall with their sewerage services than those in England (95% and 90% respectively), and there is an upward five-year satisfaction trend in Wales (England stable).

9.5.3 The same proportion of homeowners in each country correctly identify their sewerage company as being responsible for shared sewerage pipes (33% each), however there has been a 5% decrease in awareness in Wales since 2014 (38% compared to 33% in England).

9.6 Perceptions of the Consumer Council for Water

9.6.1 Customers in Wales are slightly more likely to say it's absolutely essential/very important to have a consumer body to protect their interests (76% Wales, 71% England), whereas a similar proportion are aware of CCWater when prompted (17% England, 16% Wales).

9.6.2 Customers in Wales are also slightly more satisfied with the value for money of the 21 pence charge levied on customers to pay for CCWater (88% Wales, 85% England).

10 Conclusions

10.1 For the first time, the analysis and reporting have focused on five-year trends in order to smooth out year on year changes and provide a longer term view of customer perception of company services. Trend analysis across the last five years of data has assessed whether trends are on the way up, down or stable (time series analysis).

10.2 Overall, the picture for 2015 is positive with continued high levels of performance across many key measures of customer perception since 2014. Within this some companies see more movement than others.

10.3 The five-year trend for each of the key areas below is one of significant improvement for England and Wales:

- ***Value for money (Water)***. Satisfaction has also increased slightly from 2014 to 2015, but not significantly so.
- ***Value for money (Sewerage services)***. Again, satisfaction has increased since 2014, but not significantly so.
- ***Trust***. Levels of trust have fallen slightly since 2014 but not significantly.
- ***Care***. Perceptions that water companies care about the services they provide have fallen slightly since 2014 but not significantly.

10.4 Five year trends are stable in the following areas:

- ***Affordability***. Perceived affordability of water bills fell slightly, but not significantly, by 2% from 2014 to 2015.
- ***Fairness***. Perceptions that charges are fair fell significantly from 68% in 2014 to 62% in 2015.

10.5 Customer satisfaction in Wales is significantly higher than in England in a number of key areas including:

- Value for Money (water and sewerage services).
- Overall satisfaction with water services.
- Overall satisfaction with sewerage services.

Along with:

- Levels of trust.
- Awareness of WaterSure/Welsh Water Assist versus WaterSure in England.

10.6 Cluster analysis was repeated this year and finds little change in the proportion of customers in the 'Very Satisfied' cluster (56% for 2015 compared with 59% for 2014).

10.7 Net promoter scores (NPS) vary hugely by individual water company. This year key drivers analysis has been undertaken to identify what drives this. Trust is the main factor influencing NPS; it was found to be more important than other factors such as overall satisfaction with water services and value for money. Although levels of trust at industry level are high (7.75 out of 10), there has been a slight fall since 2014. Given how crucial this is in driving NPS, it will be important to ensure that this does not further reduce in 2016. Improvements in this area should drive the net promoter score upwards.

10.8 Customers have higher levels of trust in water companies than energy companies, but the gap is closing. A further focus on trust may help to widen this gap again.

10.9 Awareness of CCWater continues to be low with spontaneous awareness at the same level that it was at in 2014 (just 1%). After prompting, less than 1 in 5 is aware and few of those who are aware know what CCWater does.

10.10 Despite this, once told more about CCWater, customers feel that the organisation is important. Seven in ten feel it is important to have a consumer body representing interests on water and sewerage services (similar to 2014) and eight in ten feel that the organisation provides value for money (again, similar to 2014).

10.11 The results of this year's survey show a mixed picture in terms of customer awareness of rights and responsibilities, with increasing awareness of some areas and falling awareness in others:

- Awareness of WaterSure/Welsh Water assist has dropped from 11% to 8% in 2015.
- Two-thirds of unmetered customers (65%) are aware that on request meters can be fitted free of charge, a significant increase from 51% in 2014.
- However, awareness that the meter can be trailed for 12/24 months has fallen significantly from 30% of unmetered customers in 2014, to 28% in 2015.
- Only 19% are aware of the rainwater drainage rebate (an increase of 3% from 2014).
- Awareness of the compensation scheme for service failure (Guaranteed Standard Scheme) has increased significantly in 2015 to 50% from 43% in 2014.

11 Appendix - the questionnaire

DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH Tel: 01663-767857

Introduction
Good morning/afternoon, my name is ……………………. I am calling from DJS Research, an independent research company and we are carrying out a survey about water and sewerage services on behalf of the consumer body for the water industry. Could you spare some time to answer some questions?

READ OUT IF NECESSARY
Survey Details
The survey should take around 20 minutes and is used to help ensure that you get good services from your water and/or sewerage company. We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict market research codes of conduct.

INT: READ OUT: Just to let you know, calls may be recorded for quality and training purposes

Willing to take part	**1**	**Continue**
Not willing to take part	**2**	**Thank & close**

READ OUT: During the survey I'm going to ask you about a number of services which water companies provide. If you say that you'd like to know about any of these, I'll give you the telephone number for your water company at the end of the interview.

INT INSTRUCTION - Although the focus of the survey is on water, we will also be asking you a few questions about other utility suppliers such as energy and landline suppliers. This is so that comparisons can be made between water and other utility suppliers. It is not for sales purposes.

Screener Questions

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: **S1 Are you the water bill payer in your household?** INTERVIEWER INSTRUCTION: **If respondent says that they pay their water bill as part of rent code as 2.** SINGLE CODE		
Yes	1	S3
No	2	S2
Don't know	85	
ASK IF NO/DON'T KNOW AT S1. OTHERS GO TO S2 **S2 Is there somebody else in the household who is the bill payer?** SINGLE CODE		
Yes	1	RETURN TO INTRO
No	2	CLOSE
Don't know	85	
ASK ALL **S3 And which of the following applies to the way you pay your bills…** READ OUT		
Sole bill payer	1	
You share payment of the bill with spouse/partner	2	
You share payment of the bill as part of shared house	3	
Other (specify)	80	
Don't know	85	
ASK ALL **S4 Do you or any member of your family work in….:** READ OUT		

The water industry i.e. work for a water company	1	Thank and close
A consumer organisation e.g. Passenger Focus, Energy Ombudsman	2	
Which?, Citizens Advice	3	
Market Research	4	
None of the above	87	D1
ASK ALL **D1 Please record the gender of the respondent** DO NOT ASK		
Male	1	
Female	2	
ASK ALL **D2 Which of the following age groups do you fall into?** READ OUT SINGLE CODE		
18-19	1	
20-24	2	
25-29	3	
30–44	4	
45–59	5	
60-64	6	
65-74	7	
75+	8	
Refused	86	
ASK IF CODE 5-8 AT D2. OTHERS GO TO D4 **D3 Are you retired?** SINGLE CODE		
Yes	1	
No	2	
Refused	86	
ASK ALL **D4 Which of the following describes your phone and internet provision <u>at home</u>?** SINGLE CODE		
I do not have a landline in my household at all	1	
I have a landline for broadband, but don't use it for telephone calls	2	
I have a landline for telephone calls and broadband	3	
I have a landline for telephone calls. I do not have broadband	4	
Refused	86	
The next few questions are about your occupation, and they help us make sure that a good mix of people take part in this survey.		
ASK ALL Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job. **D5 Do you (did you) work as an employee or are you (were you) self-employed?** SINGLE CODE. READ OUT IF NECESSARY		
Employee	1	D6
Self-employed with employees	2	D7
Self-employed/freelance without employees	3	D9
Not applicable - Long term unemployed/never worked	4	Q1a
Not applicable - Full time student	5	Q1a
ASK ALL EMPLOYEES (D5/1) **D6 How many people work (worked) for your employer at the place where you work (worked)?** READ OUT IF NECESSARY		
1-24	1	NOW GO TO D8
25 or more	2	

ASK ALL EMPLOYERS (D5/2) **D7 How many people do (did) you employ?**		
1-24	1	NOW GO TO D8
25 or more	2	
ASK ALL EMPLOYEES (D5/1-2) **D8 Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)**		
Yes	1	NOW GO TO D9
No	2	
ASK ALL EMPLOYED (D5/1-3) **D9 Which of the following best describes the sort of work you do? If you are not working now, please tell me which one describes what you did in your last job.** SINGLE CODE ONLY. READ OUT TEXT IN BOLD ONLY, USE PROMPTS WHERE NECESSARY		
Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer	1	
Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse	2	
Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive	3	
Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver	4	
Semi-routine manual and service occupations such as: postal worker - machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant	5	
Routine manual and service occupations such as: HGV driver – van driver - cleaner - porter - packer - sewing machinist - messenger - labourer – waiter/waitress – bar staff	6	
Middle or junior managers such as: office manager - retail manager - bank manager – restaurant manager – warehouse manager – publican	7	
Traditional professional occupations such as: accountant **-** - solicitor - medical practitioner – scientist – civil/mechanical engineer	8	
Refused	86	

ASK ALL **Q1aWho is your water company? (This may be a company which deals with your sewerage too.)** SINGLE CODE **DO NOT READ OUT COMPANY FROM SAMPLE. IF DOESN'T MATCH, CODE "DON'T KNOW"**		
Anglian Water Services Ltd	1	Q2
Dŵr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Water only companies		
Bournemouth Water Plc	11	Q3
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	CLOSE
Dee Valley Water Plc	15	Q3
Essex & Suffolk Water	16	
Affinity Water South East (formerly Veolia Water Southeast and Folkestone & Dover Water Services)	17	
Hartlepool Water Plc	18	
Portsmouth Water Plc	19	
South East Water Plc (including Mid Kent Water Plc)	20	
South Staffs Water Plc	21	
Sutton & East Surrey Water Plc	22	
Affinity Water East (formerly Veolia Water East Ltd and Tendring Hundred Water Services)	23	
Affinity Water Central (formerly Veolia Water Central and Three Valleys Water)	24	
Don't know	85	Go to Q1b
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 **Q1b Is your postcode <*insert from sample*>?**		
Yes, same as sample	1	GO TO Q1c
Incorrect – Enter correct postcode (first part and first digit of second part)	2	
IF CODE 2 AT Q1b POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE		
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 **Q1c In your area, your water company is likely to be** [insert name of water company]. **Does that sound right?**		
Yes	1	GO BACK AND CODE Q1A THEN TO FILTER AT Q2
No	2	CLOSE

ASK IF CODES 1-10 AT Q1A. OTHERS GO TO FILTER AT Q3 **Q2And do they also provide your sewerage services, or do you have a septic tank?** INTERVIEWER NOTE: PLEASE CLARIFY IF ASKED. It's a tank in your garden which collects waste from toilets etc and has to be emptied by a specialist company every so often.		
Provide sewerage services	1	
Have septic tank	2	GO TO Q6
Different company provides my sewerage services	3	CLOSE
Don't know	85	GO TO Q6
ASK IF CODES 11-24 AT Q1a. OTHERS GO TO FILTER AT Q6 **Q3 Do you have a septic tank?**		
Yes	1	Q6
No	2	Q4
ASK IF CODE 2 AT Q3. OTHERS GO TO FILTER AT Q6 **Q4 Were you aware that your sewerage services are provided by another company?**		
Yes	1	Q5a
No	2	Q5b
ASK IF CODE 1 AT Q4. OTHERS GO TO FILTER AT Q5b **Q5a And who is your sewerage company?** ADD IF NECESSARY: **the bill from your water company will also say who provides your sewerage services.** SINGLE CODE		
Anglian Water Services Ltd	1	Q6
Dŵr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
Southern Water Services Ltd	5	
South West Water Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Don't know	85	Q5b
IF NO AT Q4 OR DON'T KNOW (CODE 85) AT Q5a, REFER TO SAMPLE AND ASK: **Q5b Is your postcode <*insert postcode from sample*>?**		
Yes, same as sample	1	
Incorrect – Enter correct postcode (first part and first digit of second part)	2	
Q5c In your area, your sewerage company is likely to be [insert name of water company]. **Does that sound right?**		
Yes	1	GO BACK & CODE Q5a THEN TO Q6
No	2	CLOSE
ASK ALL **Q6 Does your household have a water meter?** SINGLE CODE		
Yes	1	
No	2	
Don't know	85	

Q7 and Q8 removed for 2015/2016
Company Information

ASK ALL **Q9 Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?** SINGLE CODE. READ OUT		
Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	1 2 3 4 5 85	
DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (SEPTIC TANK) **Q10 How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?** SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	1 2 3 4 5 85	
ASK ALL **Q11 We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity?** SINGLE CODE ONLY		
Yes, both gas and electricity No – gas and electricity from separate companies Don't have mains gas Don't know	1 2 3 85	
Q12 Thinking now about other household utility services, how satisfied or dissatisfied are you with the value for money from services such as…?: READ OUT EACH SERVICE & SINGLE CODE. READ OUT SCALE, DO NOT READ OUT NUMBERS *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.* a) Your gas service **ASK IF CODE 1-2,85 AT Q11** b) Your electricity service **ASK ALL** c) Your broadband services **ASK IF CODE 2-3 AT D4** d) Your telephone landline services **ASK IF CODE 2-4 AT D4** e) Council services **ASK ALL**		

ASK IF CODED 1 OR 2 AT Q12: a OR b AND CODED 3, 4, 5 AT Q9 OR Q10 (Q9 ONLY IF SEPTIC TANK) **Q13a Why do you say that you are more satisfied with the value for money of your gas or electricity service than your water and/or sewerage services?** TYPE IN VERBATIM COMMENT & THEN CODE FROM LIST. MULTICODE OK **[OPEN QUESTION]**		
Cheaper/better value	1	
Able to switch/not a monopoly	2	
Water and/or sewerage too expensive/have monopoly/charge what they like	3	
Good/better deal/get it free/package suits me	4	
Good service/better customer service/staff helpful/quick to sort problems	5	
No choice of water company/no negotiation/cannot change company	6	
No complaints/problems/satisfied	7	
Lack of contact/lack of information/don't know much/don't think about water company/bills just appear	8	
Poor service/ issues (i.e. meter problems, drains blocked, flooding, broken pipes, cut water supply)	9	
More/ better choice	10	
More transparent/ know what I am getting	11	
Better technology/ manage bills on line	12	
Good communication/ information/ bill every month	13	
Other (please specify)	80	
Don't know	85	
ASK IF CODED 1 OR 2 AT Q12: c OR d AND CODED, 3, 4, 5 AT Q9 OR Q10 (Q9 ONLY IF SEPTIC TANK) **Q13b Why do you say that you are more satisfied with the value for money of your landline or broadband service than your water and/or sewerage services?** TYPE IN VERBATIM COMMENT & THEN CODE FROM LIST. MULTICODE OK **[OPEN QUESTION]** **SAME LIST AS AT Q13a**		
ASK ALL **Q14 How much do you agree or disagree that the** [CODE 2 AT Q2 OR 1 AT Q3 = **'water']/**[ALL OTHERS = **water and sewerage] charges that you pay are fair?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	

ASK IF DISAGREE (CODES 4-5) AT Q14. OTHERS GO TO FILTER AT Q16a **Q15 Why do you think that the** [CODE 2 AT Q2 OR 1 AT Q3 = **'water']** **/**[ALL OTHERS = **water and sewerage] charges that you pay are unfair?** DO NOT READ OUT. MULTICODE		
Expensive/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Profits/shareholders paid too much	3	
Poor/inefficient service	4	
Poor water quality	5	
Prices vary by region/prices should be the same everywhere	6	
Had to go on a meter/no choice in having a meter	7	
Other (specify)	80	
Don't know	85	
ASK ALL CODED 1-10 AT Q1A (WaSCs) **Q16a How much do you agree or disagree that the** [CODE 2 AT Q2 OR 1 AT Q3 = **'water']** /[ALL OTHERS = **'water and sewerage'] charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL CODED 11-24 AT Q1A (WoCs) **Q16b How much do you agree or disagree that the water charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WoCs) **Q16c How much do you agree or disagree that the sewerage charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WoCs) **Q16d How much do you agree or disagree that the total water and sewerage charges that you pay for are affordable to you?** SINGLE CODE. READ OUT IF NECESSARY		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	

ASK ALL SOUTH WEST WATER CUSTOMERS (Q1a/5 OR Q5a/5) **From April 2013, the Government has introduced an annual contribution of £50 towards water and sewerage bills for customers of South West Water** **Q17 Before this interview, were you aware of this Government contribution to your bill?** SINGLE CODE		
Yes	1	
No	2	

Section B: Consumer Rights and Responsibility

ASK ALL **Q18 How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill?** READ OUT. SINGLE CODE		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	85	
ASK IF WATER METER (CODE 1 AT Q6). OTHERS GO TO Q20 **Q19 You said earlier that your household had a water meter, which of the following apply to you?** SINGLE CODE		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
You had to have a meter fitted as part of a wider metering scheme	3	
Other (specify)	80	
Don't know	85	
ASK ALL EXCEPT AFFINITY SE AND SOUTHERN WATER (CODES 17, 6 AT Q1a) AND SOUTH EAST WATER – SAMPLE 2 (CODE 20 AT Q1A AND FLAGGED SAMPLE 2 IN SAMPLE FILE) AND THAMES WATER – SAMPLE 2 (CODE 7 AT Q1A AND FLAGGED SAMPLE 2 IN SAMPLE FILE)EXCLUDE Q19/1 **Q20 Were you aware that …:** SINGLE CODE FOR EACH STATEMENT **Scale: 1=Yes, 2= No, 85= Don't know**		WILL BE ROUTED FROM POST-CODE
a) If you ask for a meter to be fitted, your water company will install one free of charge		
b) You have up to [Text replace: a year/two years] to decide whether you prefer the meter or would like to go back to a water rate charge for your property		
Text replace [a year]: Q1a/2,5,7,9,10,24,11,12,13,15,19,20,21,22,23 [two years]: Q1a/1,3,4,8,16,18		
INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is already charged for water via a meter you cannot go back to a water rate charge.		
ASK ALL **Q21 Are you aware of or are you currently on** [CODE 2 AT Q1a = **'Welsh Water Assist'**/ALL OTHERS = **'WaterSure'**] **tariff >? This was introduced to help people in low income groups who need to use a lot of water** READ OUT. SINGLE CODE		
Yes, have heard of it but do not need it	1	
Yes, have subscribed to it	2	
No, but would like to know more	3	
No, but do not need it	4	
Don't know	85	
ASK ALL, BRING IN RELEVANT CODES AS INDICATED **Q22 Are you aware of any <u>other</u> schemes offered by XX Water [or XX Water] which provide lower charges for customers who struggle to afford their bills?** IF YES, **What are they?** DO NOT READ OUT. MULTICODE OK		

Anglian Water/Hartlepool Water (Q1a/1,18) **Anglian Water Assistance Fund**		
Aquacare Plus		
Dwr Cymru (Q1a/2) **Welsh Water Assist**		
Customer Assistance Fund		
Severn Trent Water (Q1a/4) **Severn Trent Trust Fund**		
South West Water (Q1a/5) **Watercare tariff**		
WaterCare Plus		
Restart		
Fresh Start		
Southern Water (Q1a/6) **Southern Water Trust Fund**		
New Start		
Support tariff		
Thames Water (Q1a/7) **Charitable Trust**		
WaterSure Plus		
Customer Assistance Fund		
United Utilities (Q1a/8) **Charitable Trust**		
Support Tariff		
Arrears Allowance Scheme		
Wessex Water (Q1a/9) **Restart**		
Restart Plus		
Assist		
WaterSure Plus		
Yorkshire Water (Q1a/10) **Yorkshire Water Community Trust**		
Resolve		
Bournemouth (Q1a/11) **Assistance Fund**		
Bristol Water (Q1a/12) **Restart**		
Restart Plus		
Assist		
WaterSure Plus		
Cambridge Water (Q1a/13) **NewStart**		
Affinity Water (Q1a/17,23,24) **Li£t (pronounced Lift)**		
South East Water **Helping Hands Scheme**		
South Staffs Water (Q1a/21) **South Staffs Water Charitable Trust Fund**		
Sutton and East Surrey (Q1a/22) **Social tariff**		
Clear Start		
<ALL> Other (specify)		
No, not aware of any		
ASK ALL **Q24 Did you know that if none of the rainwater that runs off a property drains into the public sewer (e.g. it may drain into a soakaway or the ground); a reduced sewerage bill is available?** SINGLE CODE		
Yes, but haven't done anything about it	1	
Yes, I have done something about it	2	
No, but would like to know more	3	
No, but doesn't apply to me	4	
ASK ALL **Q25 Are you aware of any additional services offered by your water company, such as large print or braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water?** READ OUT. SINGLE CODE		
Yes, have heard of it but do not need it	1	
Yes, have subscribed to it	2	

No, but would like to know more	3	
No, but do not need it	4	
Don't know	85	
ASK ALL **Q26 Were you aware that if your** [CODE 2 AT Q2 OR 1 AT Q3 = **'water']** /[ALL OTHERS = **water and sewerage] company fails to meet certain customer service standards for reasons within their control you may be entitled to compensation?** SINGLE CODE		
Yes, was aware	1	
No, was not aware	2	
Don't know	85	
INTERVIEWER NOTE: If asked, information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company or their website		
ASK ALL **Q27a Who do you think is responsible for maintaining <u>the water pipes</u> within your property's boundaries?** DO NOT PROMPT. SINGLE CODE		
I am/the householder	1	
Landlord	2	
Organised through my insurance	3	
The local council	4	
The water company	5	
Other (please specify)	80	
Don't know	85	
INTERVIEWER NOTE: If asked, after responding, the correct answer is that the homeowner is responsible for the maintenance of water pipes at their home up to the boundary of their property (i.e. where their property meets the public highway)		
ASK ALL CODING Q2/1,85 OR Q3/2 **Q27b Who do you think is responsible for maintaining any <u>shared sewerage pipes</u> and drains that run within your property's boundaries? By <u>Shared sewerage pipes</u> we mean pipes serving more than one property.** DO NOT PROMPT. SINGLE CODE		
I am/the householder	1	
Landlord	2	
Organised through my insurance	3	
The local council	4	
The water/sewerage company	5	
Other (please specify)	80	
Don't know	85	
INTERVIEWER NOTE: If asked after responding, the correct answer is that the sewerage company is responsible for the maintenance of sewerage pipes and drains which serve more than one property, including those within your property boundary. The homeowner is responsible for maintaining a sewer or drain when it serves their property only and is within the boundary of their property		
ASK ALL **Q28 Have you contacted your water and/or sewerage company in the past 12 months?** SINGLE CODE		
Yes – water and sewerage company	1	
Yes – water company	2	Q29
Yes – sewerage company	3	
No	4	Q33a
Don't know	85	

ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q29 What was your most recent contact about?** DO NOT READ OUT. MULTICODE OK		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	
To make an enquiry about sewers and drains (transfer)	4	
Billing enquiry	5	
No supply/supply issue	6	
To report a leak	7	
To change to/ask for a water meter	8	
Water quality	9	
Water pressure	10	
Sewerage problem	11	
To enquire about programme to fit meters	12	
To enquire about hosepipe ban	13	
To ask about schemes/help paying bills	14	
Other (please specify)	80	
Don't know	85	
ASK ALL EXCLUDING Q29/1 **Q33a In the last 12 months, do you think you had reason to complain about your water [**TEXT SUB Q2/2, 85 OR Q3/1: **and/or sewerage] services and didn't?** SINGLE CODE		
Yes	1	Q33b
No	2	Q34
ASK ALL COMPLAINED Q33a/1 OR Q29/1. OTHERS GO TO Q34 **Q33b What caused your dissatisfaction** DO NOT READ OUT. MULTICODE OK		
Billing error	1	
No supply/supply issue	2	
Leak on property	3	
Leak in public place	4	
Problem with water meter installation	5	
Problem with water meter calculation/incorrect meter reading	6	
Water quality	7	
Water pressure	8	
Sewerage problem	9	
Engineer appointment not kept	10	
Engineer work not satisfactory	11	
Company staff not helpful	12	
Other (please specify)	80	
Don't know	85	
ASK IF YES AT Q33a (CODE 1). OTHERS GO TO Q34 **Q33c Why didn't you contact your water and/or sewerage company about your complaint?** DO NOT READ OUT. MULTICODE OK		
Problem resolved itself	1	
Didn't think they **could** help	2	
Didn't think they **would** help	3	
Didn't have the time to contact them	4	
Unsure how to make contact	5	
Had previous bad experience with their customer service	6	
Tried to contact but could not get through	7	
Already contacted them about this and they didn't help	8	
Other (please specify)	80	
May yet contact them	9	
Don't know	85	

ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q30Thinking about this contact with** [CODE 1 OR 2 AT Q28 = **'insert code given at Q1a']** /[CODE 3 AT Q28 AND CODE 11-24 AT Q1A = **insert code given at Q5a]** /[CODE 3 AT Q28 AND CODE 1-10 AT Q1A = **insert code given at Q1a], overall how satisfied were you with….** READ OUT EACH STATEMENT & SINGLE CODE. ROTATE STATEMENTS. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable. a) The ease of contacting someone who was able to help you b) The quality/ clarity of information provided c) The knowledge and professionalism of staff d) The feeling that your contact had been, or would be, resolved e) The way that the water company has kept you informed of progress with your enquiry/complaint/claim		
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q33a **Q31 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with** [CODE 1 OR 2 AT Q28 = **'insert code given at Q1a']** /[CODE 3 AT Q28 AND CODE 11-24 AT Q1A = **insert code given at Q5a]** /[CODE 3 AT Q28 AND CODE 1-10 AT Q1A = **insert code given at Q1a]?** SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	
ASK ALL CONTACTING WATER COMPANY (Q28/1-3) **Q32 And overall, how much effort did it take you to get your query answered?** SINGLE CODE ONLY. READ OUT SCALE		
More than I expected	1	
About what I expected	2	
Less than I expected	3	

Section C: Water on Tap

ASK ALL **Q34 How satisfied are you with the following aspects of your water supply:** READ OUT EACH STATEMENT & SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.		
The colour and appearance of your tap water	1	
Taste and smell of tap water	2	
Hardness/softness of your water	3	
The safety of your drinking water	4	
The reliability of your water supply	5	
Your water pressure	6	
ASK ALL **Q35 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your <u>water</u> supply?** SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

Q36/Q37a/Q37b have been removed for 2015/2016

Section D: Keeping it Clean

ASK ALL **Q38 Which of the following do you think are ok to dispose of down the toilet, sink or drain?** READ OUT. MULTICODE		
Fats/cooking oils	1	
Nappies	2	
Sanitary towels	3	
Tampons	4	
Razors	5	
Cotton buds	6	
Condoms	7	
Motor oil	8	
Medicines	9	
Wet wipes	10	
~~Tissues (e.g. kleenex)~~	11	
Baby wipes	12	
None of these - **DO NOT READ OUT**	87	
Don't know - **DO NOT READ OUT**	85	
INTERVIEWER NOTE: If asked after response has been given, none of these is ok		

ASK IF Q2/1,85 OR Q3/2 (NO SEPTIC TANK) **Q39 How satisfied are you with your sewerage company's management of the following aspects of their service….:** READ OUT EACH STATEMENT AND SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85 = don't know 98 = not applicable.* a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning waste water properly before releasing it back into the environment d) Minimising sewer flooding		
ASK IF Q2/1,85 OR Q3/2 (NO SEPTIC TANK) **Q40a Taking all those aspects into account, overall how satisfied or dissatisfied are you with your <u>sewerage</u> service?** SINGLE CODE. READ OUT IF NECESSARY Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	 1 2 3 4 5 85	
ASK IF CODE 4 OR 5 AT Q40a. OTHERS GO TO Q41 **Q40b Did any of the following influence your overall satisfaction?** READ OUT. MULTICODE OK. RANDOMISE LIST The level of profits made My bill Personal experiences It's a privatised company Customer service Views about the water industry in general The water industry in general Media stories Word of mouth Other (SPECIFY) None of these	 1 2 3 4 5 6 7 8 9 80 87	
ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY **Q41 Now, thinking about other household services you receive, how satisfied or dissatisfied are you with:…?: READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.* a) Your gas service **ASK IF CODE 1-2 AT Q11** b) Your electricity service **ASK ALL** c) Your broadband services **ASK IF CODE 2-3 AT D4** d) Your telephone landline services **ASK IF CODE 2-4 AT D4** e) Council services **ASK ALL**		

ASK ALL **Q42 How much do you agree or disagree that your water** [IF CODES 1-10 AT Q1A AND Q2/1, 85 also insert '**and sewerage'] company cares about the service it gives to customers? READ OUT IF NECESSARY. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL **Q43 How much do you agree or disagree that your** [IF CODE 1 AT Q11 = **'energy';** IF CODE 2 AT Q11 = **'gas or electricity'**; IF CODE 3/85 AT Q11 = **'electricity'] company cares about the service it gives to customers? READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
ASK ALL **Q44a How much do you trust your** [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a = **'water'] /** [ALL OTHERS = **'water and sewerage'] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	Q44b
	2	
	3	
	4	
	5	
	6	
	7	Q45
	8	
	9	
Trust them completely	10	
Don't know	85	
ASK IF CODES 1-4 AT Q44a. OTHERS GO TO Q45 **Q44b Why do you give a score of** *<insert code from Q44a>***? TYPE IN**		
Don't know	85	

ASK ALL **Q45 How much do you trust your** [IF CODE 1 AT Q11 = **'energy'**; IF CODE 2 AT Q11 = **'gas or electricity'**; IF CODE 3 AT Q11 = **'electricity'**] **company? Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Trust them completely	10	
Don't know	85	
ASK IF CODE 1 OR 2 AT Q35 AND CODE 4 OR 5 AT Q9 **Q46 You have said that you are <u>satisfied with water</u> <u>services</u> you receive, but you are <u>dissatisfied with value for money</u>. Why is this?** DO NOT READ OUT. MULTICODE OK		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	4	
Poor water quality	5	
Poor/inefficient service/issues not resolved	6	
Water meter issues/problems	7	
Leaking pipes	8	
Lack of visibility	9	
Not enough information/communication	10	
Profits too high	11	
Confusing bills	12	
Price isn't fair	13	
No choice/monopoly	14	
Prices for any service could probably be lower	15	
Companies aren't paying enough tax/evading tax	16	
Other (specify)	80	
Don't know	85	
ASK IF CODE 1 OR 2 AT Q40a AND CODE 4 OR 5 AT Q10 **Q47 You have said that you are <u>satisfied with sewerage services</u> you receive, but you are <u>dissatisfied with value for money</u>. Why is this? DO NOT READ OUT. MULTICODE OK**		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	3	
Poor water quality	4	
Poor/inefficient service/issues not resolved	5	
Water meter issues/problems	6	
Leaking pipes	7	
Lack of visibility	8	
Not enough information/communication	9	
Profits too high	10	
Confusing bills	11	
Price isn't fair	12	
No choice/monopoly	13	
Companies aren't paying enough tax/evading tax	14	
Other (specify)	80	
Don't know	85	

ASK (Q1a/1-10) and (Q2/1) **Q48a If it were possible to choose your water supplier, on a scale of 0-10, where 0 means you wouldn't be likely to recommend, and 10 means you would be extremely likely to recommend, taking everything into account, how likely would you be to recommend ['insert code given at Q1a'] to friends and family as a provider of water (**WaSCs without septic tank (Q2/1,85): **and sewerage) services?** SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	
ASK ALL WoCs (Q1a/11-24) without septic tank and Q3/2 **Q48b And on the same scale, how likely would you be to recommend ['insert code given at Q5a'] to friends and family as a provider of sewerage services?** SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	
ASK ALL **Q154 Sometimes companies perform better than expected and therefore make more profit. If this happens, which of the following would you prefer them to do?** RANDOMISE ORDER READ OUT. MULTICODE OK **INTERVIEWER ADD IF NECESSARY:** *So is that improving services; helping low income customers; giving a one off bill or rewarding shareholders?*		
Spend more on improving services that customers think are important, on top of spending already planned	1	
Provide more financial help to customers on low incomes who genuinely struggle to pay bills	2	
Provide a one-off bill reduction for all customers - this may work out as a few pence per customer	3	
Increase returns for shareholders who have invested in the water and/or sewerage company	4	
Other (specify)	80	
Don't know	85	
ASK IF MORE THAN ONE SPECIFIED AT Q154 (CODES 1-80). OTHERS GO TO Q49 **Q155 And which is the most important, next important, next important?** *<Script Note: Only display codes given at Q154) and use scale: First,*		

second, third, fourth, fifth dependent on number of codes displayed>		
Spend more on improving services that customers think are important, on top of spending already planned	1	
Provide more financial help to customers on low incomes who genuinely struggle to pay bills	2	
Provide a one-off bill reduction for all customers this may work out as a few pence per customer	3	
Increase returns for shareholders who have invested in the water and/or sewerage company	4	
Other (specify)	80	
Don't know	85	

Section E: Speaking up for Water Consumers

Q49. Do you know the name of the consumer body for the water industry? DO NOT READ OUT – DO NOT PROMPT		
Consumer Council for Water (CCWater)	1	Q51
Ofwat	2	Q50
TEXT SUBSTITUTE: (Company given at Q1a)	3	↓
Citizens Advice	4	
Other consumer organisation	5	
Other (specify)	80	
Don't know	85	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q49. OTHERS GO TO Q52 **Q50. Had you heard of the Consumer Council for Water before now?**		
Yes	1	Q51
No	2	Q52
Don't know	85	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q49, OR CODED 1 AT Q50. OTHERS GO TO Q52 **Q51. What, if anything, do you know about them?** DO NOT READ OUT. MULTICODE		
Water Company	1	
Consumer Body/provides a voice for consumers	2	
Does consumer research	3	
Part of Ofwat, the regulators	4	
A government agency	5	
Regulatory body for water sector	6	
Deals with complaints about water companies	7	
Other (specify)	80	
Nothing/not sure	87	

READ OUT: The Consumer Council for Water was set up in October 2005 to represent customers of water and sewerage companies in England and Wales. The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to get (and be able to recognise that they are getting) high standards and good value for money in water and sewerage services, comparing well with the best of other service sectors.		
ASK ALL **Q52 How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?** READ OUT. SINGLE CODE		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don't know	85	
ASK ALL **Q53 If you wanted to get in touch with Consumer Council for Water, do you know where to look for their contact details?** IF YES, ASK **Where?** DO NOT READ OUT. MULTICODE OK		
Yes:		
Online – search engine (e.g. Google)	1	
Online – water company website	2	
Online – Ofwat website	3	
Online – CCWater website	4	
Back of water bill	5	
Telephone directory	6	
Yellow pages	7	
Citizen's Advice	8	
Social Media (specify)	9	
Other (specify)	80	
No, don't know where to look	85	
READ OUT: Here is a bit more information about the Consumer Council for Water. As part of their role they deal with complaints about water companies, and challenge them to provide high standards of service at prices which people can afford. They are also there to answer any questions consumers may have and provide advice on water and sewerage services.		
ASK ALL **Q54 You are currently charged about 21p a year for this service as part of your water bill. How satisfied or dissatisfied are you with this in terms of value for money? READ OUT. SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

Q54b has been deleted for 2015/2016

Section F: Background

And finally a few questions about you

ASK ALL **Q55 How would you describe your ethnic background?** PROMPT IF NECESSARY. SINGLE CODE		
White: British	1	
White: Irish	2	
White: Any other White background	3	
Mixed: White and Black Caribbean	4	
Mixed: White and Black African	5	
Mixed: White and Asian	6	
Mixed: Any other Mixed background	7	
Asian or Asian British: Indian	8	
Asian or Asian British: Pakistani	9	
Asian or Asian British: Bangladeshi	10	
Asian or Asian British: Any other Asian background	11	
Black or Black British: Caribbean	12	
Black or Black British: African	13	
Black or Black British: Any other Black background	14	
Chinese	15	
Other	80	
Refused	86	
ASK ALL **Q56 Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do?** MULTICODE OK FOR CODES 1/2		
Yes (self)	1	
Yes (other)	2	
No	3	
Don't know/refused	85	
ASK ALL **Q57 Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household?** READ OUT SINGLE CODE *[Scale: 0 = none, 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 86= refused.*		
a) Adults i.e. 18 years and over		
b) Children aged 6 – 17		
c) Children aged 0-5		
ASK ALL **Q57a We would like to make sure that we take account of the views of people of all incomes. Could you tell me which of the following income bands your household falls into?** **Please take account of the income of all those in the household (before tax and national insurance) and include any pensions, benefits or extra earnings.**		
Less than £10,000	1	
£10,000 to £19,999	2	
£20,000 to £29,999	3	
£30,000 to £39,999	4	
£40,000 to £49,999	5	
£50,000 to £74,999	6	
£75,000 to £99,999	7	
£100,000 or more	8	
5Don't know	85	
Refused	86	

ASK ALL **Q58 And are you/someone in your household currently receiving any benefits or tax credits?** SINGLE CODE		
Yes	1	
No	2	
Don't know	85	
Refused	86	
ASK ALL **Q59 What type of accommodation do you live in?** READ OUT SINGLE CODE		
Owner occupied	1	
Private rental	2	
Council tenant	3	
Housing Association tenant	4	
Leaseholder	5	
Don't know	85	
Refused	86	
ASK ALL **Q60 Would you say you live in an urban or rural area?** READ OUT. SINGLE CODE		
Urban	1	
Rural	2	
Suburban/semi-rural	3	
Don't know	85	
ASK ALL **Q61 Do you have access to the internet?**		
Yes	1	
No	2	
Don't know	85	
Refused	86	
ASK IF CODED 3 AT Q21a OR Q25a. OTHERS GO TO CLOSING STATEMENT **Q62 You said you would like to know more about additional services from your water company. To find out more, you can call ['insert code given at Q1a'] on [RELEVANT NUMBER FROM TABLE BELOW].**		
ASK ALL **Q63 Would you be happy to be re-contacted for future research projects on behalf of CCWater?**		
Yes	1	
No	2	

Telephone Numbers

Q1a Code	Water Company	Q69a insert
1	Anglian Water Services Ltd	03457 91 91 55
2	Dŵr Cymru Cyfyngedig (Welsh Water)	0800 052 0145
3	Northumbrian Water Ltd	0345 2660585
4	Severn Trent Water Ltd	03457 500 500
5	South West Water Ltd	0344 346 1010
6	Southern Water Services Ltd	0330 303 0277
7	Thames Water Utilities Ltd	0800 980 8800
8	United Utilities Water Plc (North West Water)	Metered (Q6/1) 0345 672 2999
		Unmetered (Q6/2) 0345 672 2888
9	Wessex Water Services Ltd	0345 600 3600
10	Yorkshire Water Services Ltd	0345 1 24 24 24
11	Bournemouth Water Plc	01202 590059
12	Bristol Water Plc	0345 600 3600
13	Cambridge Water Company Plc	01223 706050
15	Dee Valley Water Plc	01978 833200
16	Essex & Suffolk Water	0345 2660534
17	Affinity Water Southeast	Metered (Q6/1) 0345 357 2401
		Unmetered (Q6/2) 0345 357 2402
18	Hartlepool Water Plc	01429 858 030
19	Portsmouth Water Plc	023 9249 9666
20	South East Water Plc (including Mid Kent Water Plc)	0333 000 0001
21	South Staffs Water Plc	0845 60 70 456
22	Sutton & East Surrey Water Plc	01737 772 000
23	Affinity Water East	Metered (Q6/1) 0345 357 2401
		Unmetered (Q6/2) 0345 357 2402
24	Affinity Water Central	Metered (Q6/1) 0345 357 2401
		Unmetered (Q6/2) 0345 357 2402

Thank you for sparing the time to take part.
This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.
Should you wish to contact the Consumer Council for Water you can call their national enquiries line on 0121 345 1000 or visit their website at www.ccwater.org.uk
Should you want to contact the MRS (the Market Research Society) to verify that DJS Research comply with the code of conduct you can call them on 0500 39 69 85.

12 Appendix - Sample profile

Figure 96: Sample profile

	Unweighted		Weighted	
	No	**%**	**No**	**%**
Total	**5964**	**100%**	**5964**	**100%**
Age				
18-29	164	3%	181	3%
30-44	1333	22%	1401	23%
45-59	2114	35%	2115	35%
60-74	1565	26%	1480	25%
75+	788	13%	787	13%
SEC				
Higher managerial, administrative & professional occupations	2468	41%	2438	41%
Intermediate occupations	1354	23%	1323	22%
Routine & manual occupations	1547	26%	1575	26%
Unemployed/students	595	10%	628	11%
Household composition				
Households without children	1680	28%	1727	29%
Households with children	4128	69%	4082	68%
Refused	156	3%	155	3%
Gender				
Male	2790	47%	2813	47%
Female	3174	53%	3151	53%
Type of Company				
Water and Sewerage Company (WaSC)	3607	60%	4679	78%
Water only Company (WoC)	2357	40%	1285	22%

Sample base sizes

All respondents	Sample base size
Total	5964
England	5417
Wales	547
Water and Sewerage Companies	3607
Water only Companies	2357
Anglian Water	401
Dŵr Cymru Welsh Water	402
Northumbrian Water	201
Severn Trent Water	500
South West Water	401
Southern Water	201
Thames Water	200
United Utilities	401
Wessex Water	500
Yorkshire Water	400
Bournemouth Water	350
Bristol Water	150
Cambridge Water	150
Dee Valley Water	150
Essex & Suffolk Water	150
Affinity Water Southeast	200
Hartlepool Water	154
Portsmouth Water	151
South East Water	149
South Staffs Water	151
Sutton & East Surrey Water	152
Affinity Water East	200
Affinity Water Central	250

Responses to most of the questions are based on the sample sizes above, excluding don't know responses. This means that the base size for these questions will be slightly smaller than the sample sizes shown above. However, this does not affect statistical reliability as the proportion of don't knows excluded is too small to make a difference with the exception of:

- Q39 Satisfaction with sewerage company's management of services and Q40a Overall satisfaction with sewerage service where the base size is reduced because the questions ***aren't*** asked of households with a septic tank (299 at a total level).
- Contact with water/sewerage company. Only 968 customers contacted their water and/or sewerage company. All questions within this section (Q29-Q32) are only asked of ***contactors*** or those who had reason to contact and didn't (Q33a-c).

Proportion of metered households

Figure 97: Proportion with water meters

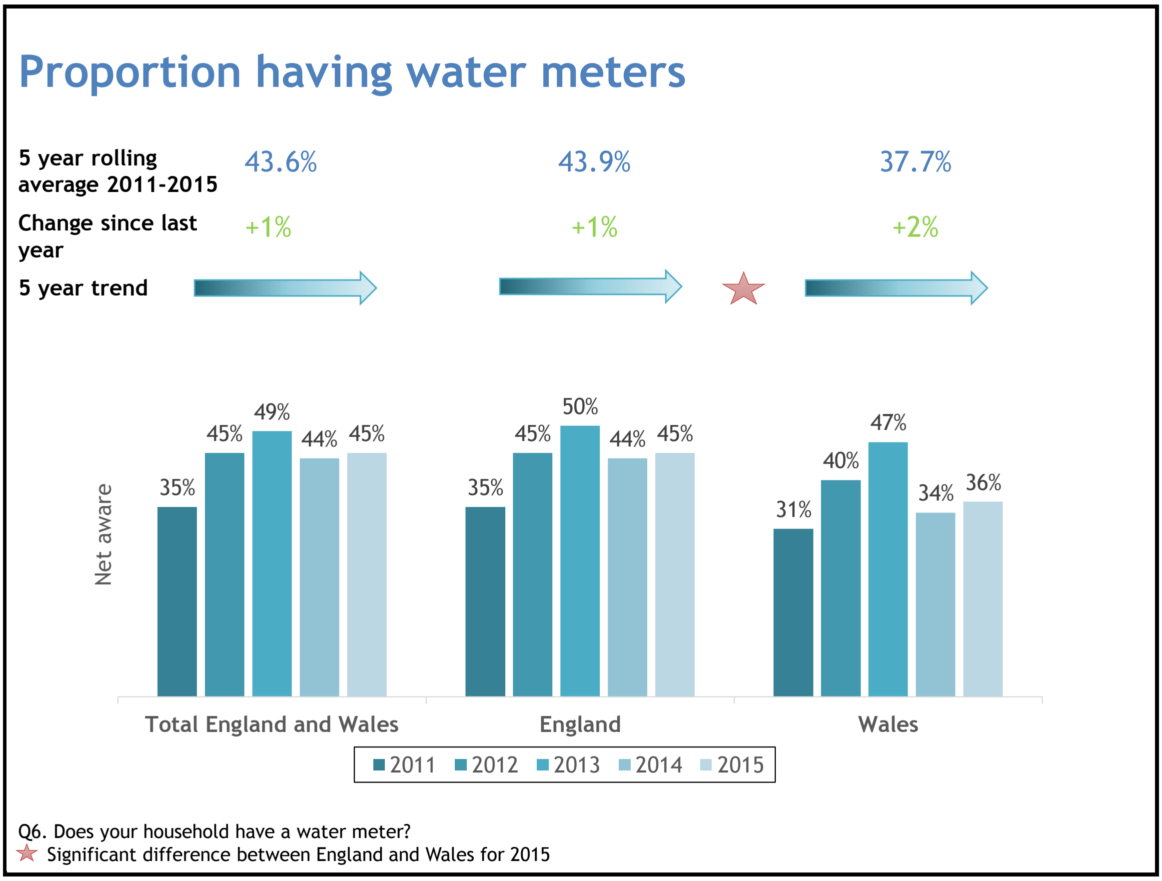


Figure 98: Proportion with water meters - WaSCs

Proportion with water meters	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WaSC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	43.6%	35%	45%	49%	44%	45%	↔	n/a	n/a
Total WaSCs (2015 base sample: 3607)	43.2%	35%	44%	48%	44%	45%	↔	43.2%	n/a
Anglian Water (2015 base sample: 401)	66.9%	59%	69%	68%	67%	70%	↑	↑	+3%
Dŵr Cymru Welsh Water (2015 base sample: 402)	35.5%	30%	38%	46%	33%	34%	↔	↓	+1%
Northumbrian Water (2015 base sample: 201)	31.6%	20%	31%	36%	39%	34%	↑	↓	-5%
Severn Trent Water (2015 base sample: 500)	35.8%	30%	35%	38%	37%	37%	↑	↓	=
South West Water (2015 base sample: 401)	69.3%	61%	67%	76%	75%	68%	↑	↑	-7%
Southern Water (2015 base sample: 201)	60.1%	44%	53%	67%	69%	80%	↑	↑	+11%
Thames Water (2015 base sample: 200)	36.9%	28%	44%	39%	36%	37%	↔	↔	+1%
United Utilities (2015 base sample: 401)	36.2%	30%	36%	46%	35%	37%	↔	↓	+1%
Wessex Water (2015 base sample: 500)	48.0%	37%	47%	55%	49%	47%	↔	↔	-2%
Yorkshire Water (2015 base sample: 400)	44.9%	32%	45%	54%	43%	45%	↔	↔	+2%

Figure 99: Proportion with water meters - WoCs

Proportion with water meters	5 year rolling company average	Five year company trend					5 year company trend	Company average vs WoC average	Company change since last year
		2011	2012	2013	2014	2015			
Industry (2015 base sample: 5964)	43.6%	35%	45%	49%	44%	45%	↔	n/a	n/a
Total WoCs (2015 base sample: 2357)	45.0%	37%	48%	53%	43%	44%	↔	45.0%	n/a
Affinity Water Central (2015 base sample: 250)	40.6%	33%	49%	50%	36%	37%	↔	↔	+2%
Affinity Water East (2015 base sample: 200)	71.4%	67%	79%	78%	65%	68%	↔	↑	+4%
Affinity Water Southeast (2015 base sample: 200)	86.4%	87%	84%	84%	91%	87%	↔	↑	-4%
Bournemouth Water (2015 base sample: 350)	56.1%	49%	55%	68%	53%	58%	↔	↑	+4%
Bristol Water (2015 base sample: 150)	37.4%	30%	43%	47%	31%	38%	↔	↓	+7%
Cambridge Water (2015 base sample: 150)	62.6%	57%	68%	66%	59%	64%	↔	↑	+5%
Dee Valley Water (2015 base sample: 150)	54.1%	48%	64%	55%	46%	57%	↔	↑	+11%
Essex & Suffolk Water (2015 base sample: 150)	54.5%	47%	53%	61%	54%	52%	↔	↑	-1%
Hartlepool Water (2015 base sample: 154)	27.3%	28%	26%	29%	23%	30%	↔	↓	+6%
Portsmouth Water (2015 base sample: 151)	26.1%	16%	32%	36%	24%	24%	↔	↓	+1%
South East Water (2015 base sample: 149)	57.4%	48%	50%	65%	59%	63%	↑	↑	+5%
South Staffs Water (2015 base sample: 151)	25.7%	19%	29%	35%	23%	24%	↔	↓	+1%
Sutton & East Surrey Water (2015 base sample: 152)	36.6%	28%	47%	41%	39%	28%	↔	↓	-11%

The Consumer Council for Water

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