CONSUMER COUNCIL FOR Water
CYNGOR DEFNYDDWYR Dŵr

Water Matters

Household customers' views on their water and sewerage services 2016

bmg research

On behalf of CCWater

June 2017

Water Matters 2016

Prepared for: Consumer Council for Water

Prepared by: BMG Research

Produced by BMG Research

www.bmgresearch.co.uk

Project: 1114

Registered in England No. 2841970

Registered office:

BMG Research
Beech House
Greenfield Crescent
Edgbaston
Birmingham
B15 3BE
UK

Tel: +44 (0) 121 3336006

UK VAT Registration No. 580 6606 32

Birmingham Chamber of Commerce Member No. B4626

Market Research Society Company Partner

The provision of Market Research Services in accordance with ISO 20252:2012

The provision of Market Research Services in accordance with ISO 9001:2008

The International Standard for Information Security Management ISO 27001:2013

Investors in People Standard - Certificate No. WMQC 0614

Interviewer Quality Control Scheme (IQCS) Member Company

Registered under the Data Protection Act - Registration No. Z5081943

A Fair Data organisation

Cyber Essentials certification

Table of Contents

All links in this Table of Contents are hyperlinked and will take you to the section of the report you select. Please hold down Ctrl button on your keyboard and select the section you want to visit with your mouse to be taken directly to this section.

Table of Figures

Table of Tables

1 Executive Summary

Water Matters is the annual household satisfaction tracking survey commissioned by the Consumer Council for Water. Commissioned first in 2006, Water Matters aims to identify household customers' views of water and sewerage services across England and Wales and monitors changes in these views over time.

This year's survey consisted of 5,420 telephone interviews with household water bill payers between 10th October 2016 and 15th January 2017. A minimum of 200 interviews were carried out with each Water and Sewerage Company (WaSC) and a minimum of 150 with each Water only Company (WoC). All water companies were given the opportunity to boost their sample; six WaSCs and one WoC opted for this and their sample size is larger as a result.

Analysis has been undertaken at total sample level (England and Wales combined), by nation (England and Wales separately) and by water company. This includes 5 year trend analysis to determine the direction of travel – improving, stable or deteriorating – for each measure. Five year trends are not significant unless specifically stated.

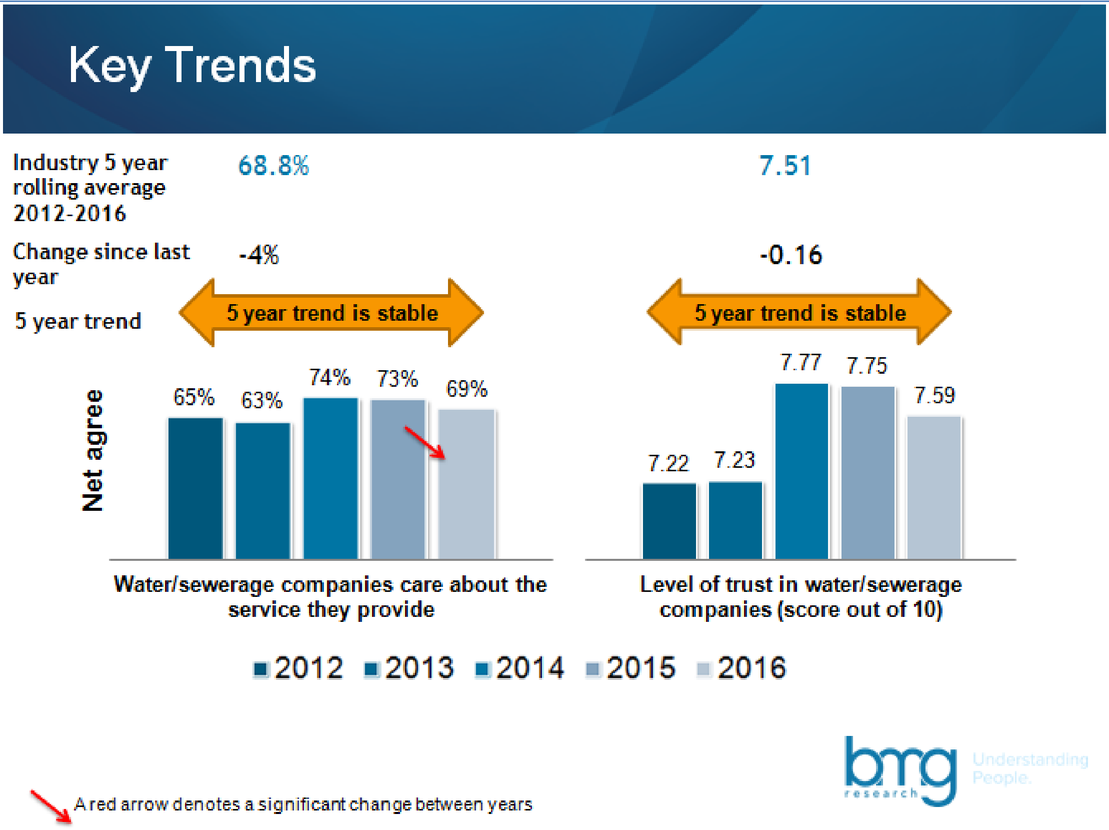
1.1 Key findings

1.1.1 Care and trust

Customer perception that companies care about the services they provide, and customer trust in water companies both remain high. Seven in ten (69%) customers across England and Wales agree that their water company cares about the services they provide. Customers in Wales are significantly more likely (77%) than those in England (68%) to agree. The overall 5 year trend for England and Wales remains stable as per Figure 1.

In 2016, the average level of trust is 7.59 (on a scale of 1 – 10 where 1 means "not at all" and 10 is "trust them completely"). This is a significant fall from 7.77 in 2014 and 7.75 in 2015. Customers in Wales are significantly more likely to trust their water company (7.92 vs. 7.56 for England). Despite a lower trust score this year, the overall 5 year trend for England and Wales remains stable as in Figure 1.

Figure 1: Care and Trust measures - Key Trends



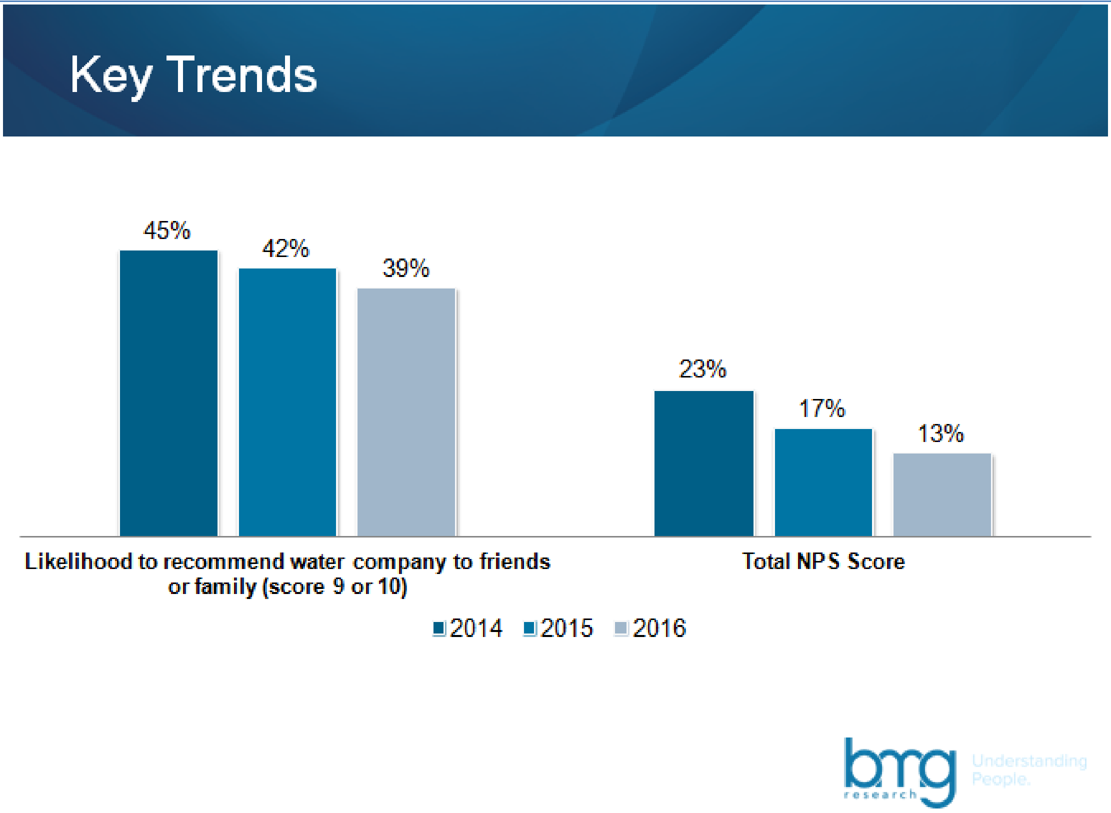
1.1.2 Likelihood to recommend (Net Promoter Score - NPS)

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/sewerage company to friends or family. This was done in order to calculate a Net Promoter Score (NPS)[1].The industry NPS is +13. Customers in Wales are significantly more likely than those in England to recommend their water company (+31 compared to +12).

'Likelihood to recommend' and NPS have both fallen significantly since 2015. Just under four in ten (39%) are very likely to recommend their supplier (scores of 9 or 10), significantly less than 2015 (42%). The 2016 NPS for the water industry is +13, also significantly lower than the +17 measured in 2015. Scores ranged from -4 to +33 across all WaSCs and WoCs. Only three companies 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.

Figure 2: Recommending Water Companies - Key Trends[2]



1.1.3 Value for money

In 2016, 73% of customers are satisfied with value for money of their water services, a significant fall from 76% in 2015. Customers in Wales are significantly more likely than those in England to be satisfied with value for money of their water service (78% vs. 73%). The overall 5 year trend is stable in 2016.

More than seven in ten (76%), are satisfied with value for money of the sewerage services they receive, a slight but significant fall from 78% in 2015. Customers in Wales are significantly more likely than those in England to be satisfied (81% vs. 76%). The overall 5 year trend is stable in 2016.

1.1.4 Fairness and affordability of charges

In 2016, more than six in ten (63%) customers agree that the charges they pay are fair, a slight increase since 2015 (62%). Customers in Wales are significantly more likely than those in England to agree that charges are fair (70% vs. 63%). The overall 5 year trend is stable.

Three in four (74%) agree that the water/sewerage charges they pay are affordable, the same as in 2015. However, perceptions of affordability have improved significantly across England and Wales over the last 5 years. There is no significant difference in perceptions of affordability between England and Wales (74% and 78% respectively).

[2] Question new to 2014

Seven in ten (71%) are likely to get in touch with their water company if they are worried about paying a bill; a small but significant 2% fall on 2015. Customers in England are marginally more likely than those in Wales to get in touch (71% vs. 68%). The overall 5 year trend is stable.

1.1.5 Satisfaction with water supply

Overall satisfaction with water supply services is very high with more than nine in ten (93%) satisfied (also 93% in 2015). Customers in Wales are significantly more likely than those in England to be satisfied with their water supply (95% vs. 92%). The overall 5 year trend remains stable.

Satisfaction with all aspects of water supply also remains very high; reliability of supply (96%), the colour and appearance of tap water (94%), safety of the drinking water (90%), water pressure (89%), taste and smell (87%) and hardness/ softness of water (71%). The 5 year trend for each is stable.

1.1.6 Confidence in the longer-term supply of water

More than three-quarters (78%) are confident that their water supply will be available in the longer term without being subject to hosepipe bans or other restrictions on use[3]. Customers in Wales are significantly more to be confident about this than customers in England (86% compared to 78%).

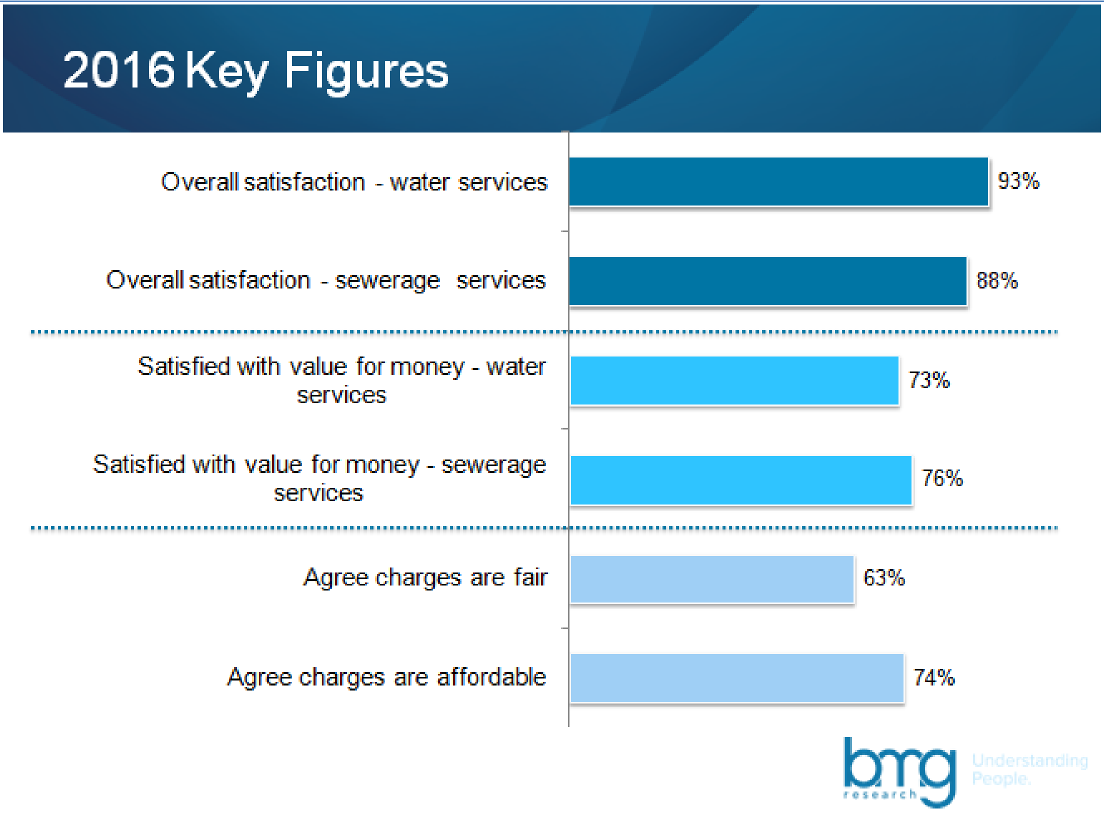
1.1.7 Satisfaction with sewerage service

In 2016, 88% of customers are satisfied with sewerage services overall, a significant fall from 91% in 2015. Customers in Wales are significantly more likely to be satisfied than those in England (93% compared to 87%). Although the 5 year trend for overall satisfaction with sewerage services is stable, satisfaction has fluctuated year-on-year.

Satisfaction with all aspects of sewerage services has fallen significantly since 2015; reducing odours from treatment works (74% in 2016, 81% in 2015), maintenance of pipes and treatment works (77% in 2016, 87% in 2015), cleaning of waste water before releasing it into the environment (77% in 2016, 87% in 2015), and the minimisation of sewer flooding (76% in 2016, 84% in 2015). The fall in satisfaction is driven by an increase in ambivalence as the proportion of dissatisfied customers is unchanged. There is no change in the 5 year trends for the industry which are still stable.

[3] New question to Water Matters 2016

Figure 3: Satisfaction summary 2016



1.1.8 Bill clarity

There is a high level of agreement that bills are clear; 85% agree it is clear how much needs to be paid and when, and 80% agree it is clear how the final amount was reached. This is in line with 2011 and 2014 when customers were last asked about bill clarity.

Customers in Wales are significantly more likely than those in England to agree that it is clear how much needs to be paid and when (89% vs. 85%), and how the final amount payable was reached (86% vs. 80% respectively).

1.1.9 Awareness of WaterSure

In 2016, 12% of customers are aware of, or subscribed to the WaterSure tariff; this is a significant increase from 8% in 2015. However, the overall 5 year trend for awareness of the WaterSure tariff remains stable. Awareness is significantly higher in Wales than in England (16% vs. 12%). Whilst awareness of the tariff in England over the last 5 years has fluctuated, in Wales there has been a significant increase in awareness of Welsh Water Assist/WaterSure Wales over the last 5 years.

One in ten (10%) customers across England and Wales has never heard of WaterSure but would like to know more.

1.1.10 Awareness of company specific social tariff schemes

Awareness of other company specific schemes which provide lower charges for customers who struggle to pay their bills remains low at just 5% (vs. 4% in 2015). The seemingly low levels of awareness will in part reflect that social tariffs are aimed at a relatively small group of customers who struggle financially.

1.1.11 Awareness of priority services[4]

Awareness of priority services has fallen significantly since 2015 by 6%, and is now 44%. Although the 5 year trend indicates that awareness has improved significantly across England and Wales this is linked to a change in the question wording in 2014, as awareness has levelled off following the increase in 2014.

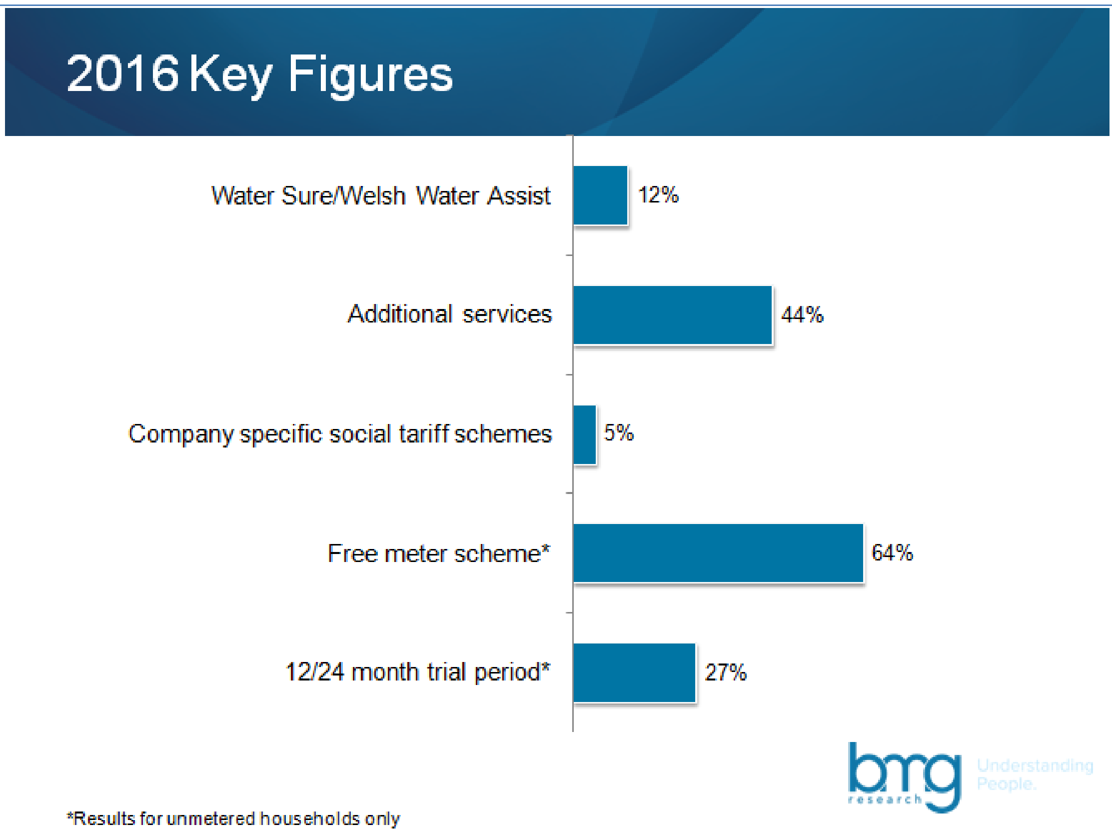
1.1.12 Water meter fitting and trialling – customers from unmetered households

More than six in ten (64%) of unmetered customers are aware that if requested, water meters will be fitted free of charge. This is the same as in 2015 and the 5 year trend is stable.

However, awareness that water meters can be trialled for 12/24 months is much lower, with 27% being aware of this, the same as in 2015. The overall 5 year trend is downward; awareness has fallen significantly in the last 5 years.

Customers in Wales are significantly more likely than those in England to be aware of the meter trial period (32% vs. 26%).

Figure 4: Consumer rights - Awareness 2016



[4] A 2017 terminology change within the industry previously referred to as 'additional services'. It will continue to be referred to as 'additional services' for the remainder of this report to reflect the question text used in Water Matters 2016

1.1.13 Contact with the water company

Of those that contacted their water company in the last 12 months, eight in ten (81%) are satisfied with their overall contact experience, the same as in 2015. Customers in Wales are more likely than customers in England to be satisfied with their contact (86% vs. 81%), albeit not significantly so.

Over 5 years, satisfaction with contact handling across England and Wales, and in England has improved significantly. The 5 year trend for Wales is stable.

Satisfaction is high with all aspects of contact handling such as, the ease of making contact, the quality and clarity of the information provided or the professionalism of staff. At least three in four customers are satisfied with all aspects of contact. This is reflected in 5 year trends for increased satisfaction with the exception of 'feeling that the contact had been or would be resolved' which is stable.

In terms of more general customer services such as meter readings, bill provision and frequency, payment options; four in five (82%) customers are satisfied with the customer service of their water company. Customers in Wales are significantly more likely than those in England to be satisfied (89% vs. 82%).

1.1.14 Comparison of different household service providers

In 2016, 69% of customers agree that their water company cares about the service they provide to customers, the same proportion as for energy companies. This is a fall of 4% for water companies since 2015, whilst views on energy companies are unchanged.

Despite a significant fall in trust since 2015 (from 7.75 to 7.59), water companies still have a higher trust score than energy companies (7.41).

Compared to other household providers, satisfaction with value for money of water (73%) and sewerage (76%) services is significantly lower than for gas (80%), electricity (80%) and telephone (79%) providers, but higher than broadband (72%) or Council services (68%).

Water companies compare favourably in terms of satisfaction with services; satisfaction with overall water service is ranked 1st at 93% closely followed by gas and electricity with 92% satisfaction, and sewerage services with 88%.

1.1.15 Significant differences between England and Wales

Customers in Wales are significantly more likely to be satisfied with their water company compared to customers in England and for the majority, these differences are significant. These have been noted throughout the text above, however for ease of reference the significant differences are also shown in Table 1 overleaf.

Table 1: England and Wales – significant differences 2016

	England	Wales
Satisfaction with water and sewerage services		
Overall satisfaction with water services	92%	95%
Overall satisfaction with sewerage services	87%	93%
Satisfaction with value for money		
Satisfaction with value for money of water services	73%	78%
Satisfaction with value for money of sewerage services	76%	81%
Views on clarity, fairness and affordability of charges		
Clarity of how much needs to be paid and when	85%	89%
Clarity of how the final amount was reached	80%	86%
Agree charges are fair	63%	70%
Integrity		
Care of service provision	68%	77%
Level of trust	7.56	7.92
Awareness of consumer rights and responsibilities		
Awareness of water meter trial period	26%	32%
Awareness of WaterSure	12%	16%
Satisfaction with and views on contact experiences		
Satisfaction with customer services in general	82%	89%
Water on tap		
The reliability of your water supply	96%	98%
Satisfaction with the safety of your drinking water	90%	94%
Satisfaction with taste and smell of tap water	87%	93%
Satisfaction with hardness/softness of water	70%	93%
A sustainable, resilient sewerage system		
Satisfaction with reducing smells from sewage treatment works	73%	82%
Satisfaction with cleaning waste water properly before releasing it back into the environment	76%	85%
Satisfaction with maintenance of sewerage pipes and treatment works	77%	88%
Satisfaction with minimising sewer flooding	76%	87%
Likelihood to recommend as a provider of water services		
Extremely likely to recommend water company (9-10)	38%	50%

2 Introduction

2.1 Background

The Consumer Council for Water (CCWater) has represented the interests of consumers in the water industry since 2005, providing a strong voice for consumers in England and Wales, with the aim of ensuring that customers receive (and recognise that they receive) high standards and good value for money in water and sewerage services.

Broadly, CCWater's priorities include:

- **'Value for Money'**: a fair, affordable price and charging system;
- **'Right First Time'**: problems sorted out quickly without hassle;
- **'Water on Tap'**: a safe, secure, reliable supply of water used wisely;
- **'A Sewerage System which Works'**: responsible treatment and removal of sewage, preventing sewer flooding and reducing smells from sewage treatment works;
- **'Speaking up for Water Consumers'**: influencing improvements for consumers.

As part of this, CCWater regularly assesses bill-payers' views of the various services offered by the Water and Sewerage Companies (WaSCs) and Water only Companies (WoCs) that operate across England and Wales.

The 2016 Water Matters study is the eleventh annual survey of household customers' experiences and perceptions of their water and sewerage service providers.

2.2 Research objectives

The objectives of Water Matters 2016 are to:

- Understand household customers' views about all aspects of water and sewerage services;
- Understand how these views change over time;
- Identify 5 year trends for each water company between 2012 and 2016 and any significant changes in the trend;
- Identify significant changes in customer views across England and Wales, and for England and Wales separately between 2012 and 2016, and also since the last survey was conducted in 2015.

The research is used by CCWater 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 organisational Forward Work Programme and Operational Business Plan.

The findings from Water Matters are disseminated to a wide range of stakeholders, including CCWater Policy Managers and Regional Committees, water companies that use the findings to feed into Ofwat's review of their performance, CCWater's policy and press team, the wider utility industry, and the wider public via CCWater's website.

2.3 Methodology

Water Matters surveys the views of household water bill payers across England and Wales. Respondents are responsible, either solely or jointly, for paying their household's water bill.

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[5]) within the relevant census region for each water company.

The age groups used in the analysis of the survey data were altered in 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 for findings from 2014 onwards.

In 2014, research was commissioned to identify the proportion of younger bill payers in England and Wales. A representative sample of 1,000 face-to-face interviews 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.

The 2016 Water Matters telephone survey comprised a random sample of households across England and Wales. A random digit dial (RDD) approach 'enhanced' by appending additional contact telephone numbers and lifestyle data to the selected sample to help target calls, reduce the likelihood of unbalanced response rates and ensure quotas were met, particularly for harder to reach groups, such as those in the younger age groups.

Fieldwork took place between 10 October 2016 and 15 January 2017. This included a pilot survey of 40 customers to review interview length and routing.

A total of 5,420 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.

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

- Anglian – 200 additional interviews
- Dŵr Cymru Welsh Water – 200 additional interviews
- Severn Trent – 200 additional interviews
- United Utilities – 200 additional interviews
- Wessex – 300 additional interviews
- Yorkshire – 200 additional interviews

[5] SEC classifications are: Higher managerial, administrative & professional occupations; Intermediate Occupations; Routine & manual occupations; Long term unemployed/never worked/Student

- South East – 150 additional interviews

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 the Figure below.

Figure 5: Statistical reliability

	Sample Size	10 or 90%	30 or 70%	50%
Total	5420	0.80%	1.22%	1.33%
England	4868	0.84%	1.29%	1.40%
Wales	552	2.50%	3.82%	4.17%
WaSCs	3305	1.02%	1.56%	1.70%
WoCs	2115	1.28%	1.95%	2.13%
Company sample sizes	150	4.80%	7.33%	8.00%
	200	4.16%	6.35%	6.93%
	300	3.39%	5.19%	5.66%
	400	2.94%	4.49%	4.90%
	500	2.63%	4.02%	4.38%
Metered households	2926	1.09%	1.66%	1.81%
Unmetered households	2389	1.20%	1.84%	2.01%
n=150: Affinity Water Central, Affinity Water East, Affinity Water South East, Bournemouth, Bristol, Cambridge, Dee Valley, Essex & Suffolk, Hartlepool, Portsmouth, South Staffordshire, Sutton & East Surrey				
n=200: Northumbrian, Southern, South West, Thames				
n=300: South East				
n=400: Anglian, Dŵr Cymru Welsh Water, Severn Trent, United Utilities, Yorkshire				
n=500: Wessex				

Data for each water company has been weighted by the number of household water supply connections for each of the 23 water companies.

The questionnaire is similar to previous years, although it omits a few questions asked in previous surveys and includes a small number of new and re-introduced questions. This ensures that the survey both addresses emerging issues as well as continuing to track on-going views of interest to the water industry and its customers.

2.4 Analysis

2.4.1 General notes

Due to rounding in the software, when summed, percentages may be ±1% different from summing individual proportions.

All data excludes don't knows, with the exception of questions relating to awareness and open response questions which are reported with don't know responses included.

Questions regarding bill clarity required in some instances, individual responses to be merged to form an overall view for each customer. The cases that required merging were where a respondent receives separate bills for their water and sewerage services and rated the clarity of each. Analysis was conducted to identify the best approach to merge variables from the choice of 'Min' (using the most negative of the two responses provided) or 'Max' (using the most positive of the two responses provided). Analysis revealed no statistical difference when swapping the more positive rating for the most negative rating. The approach adopted in this instance has been the 'Max' approach.

Weighting has been applied to figures referring to the Total (England and Wales combined), England and Wales by nation and the WoC and WaSC averages. For consistency with previous reports, all figures reported by individual water company are unweighted.

The base sample sizes reported in the WaSC and WoC analysis tables include don't knows consistent with the layout of previous Water Matters reports. The actual base sizes for each question will vary slightly from these as they exclude don't know responses; in nearly all cases the numbers of don't knows excluded is so small that there is no difference from the margin of error for the full sample size. Open response questions display coded responses greater than 3% only and are based on all responses.

Significant differences at the 95% confidence interval are shown in the charts with coloured arrows/ text; green indicates a significant upward 5 year trend or increase since 2015, red indicates a significant downward 5 year trend of fall since 2015, and a stable trend where there is no significant change over 5 years or significant difference since 2015 is represented by or orange text.

2.4.2 Mann-Kendall Time Series analysis of five year trends

Whether a trend exists in the proportional data is assessed by firstly, the exponential smoothing of the five year observations. Smoothing produces a forecast for each of the survey years, which is a weighted average of the year in question and all years preceding it - this process smoothes out spikes or troughs in the reported results. It is whether the smoothed data shows monotonicity (i.e. smoothed observations increase year-on-year, or decrease year-on-year), or near monotonicity which determines whether a longer-term increasing or decreasing trend exists, which is determined by using a Mann-Kendall test[6]. Mann-Kendall tests of +1 or +0.9 highlight a monotonic upward trend, and -1 or -0.9, a monotonic downward trend. Note that the smoothing process was applied to transformed proportions (arcsine square root transformation) to prevent forecasts from passing the lower (0%) or upper (100%) bounds, and that a fairly conservative smoothing parameter of alpha = 0.5 applied.

Trends are significantly positive or improving if a is present and a significantly negative or declining trend is represented by a . Where no significant 5 year trend has been identified, this has been indicated by the presence of a .

[6] See Appendix 'Technical analysis note' for a detailed explanation for the use of the Mann-Kendall test

2.4.3 Cluster Analysis

Cluster analysis has been conducted each year since 2013. This 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.

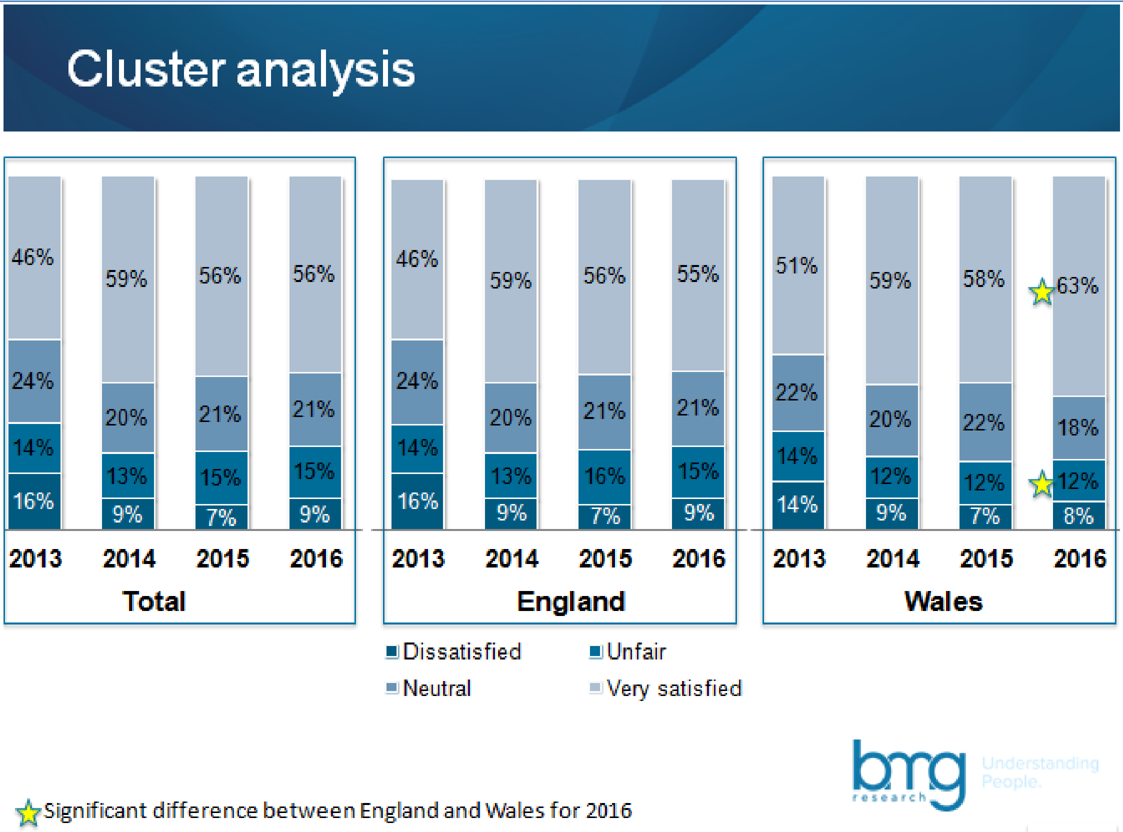
The cluster analysis has been re-run in 2016 using the same segmentation as in previous years and the proportions for this year are as follows:

- Cluster 1 – “Very Satisfied” – 56% (56% 2015). This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster by far.
- Cluster 2 – “Neutral” – 21% (21% 2015). These customers feel neutral to satisfied with value for money, services, affordability and fairness. The second largest cluster and similar to 2015.
- Cluster 3 – “Unfair” – 15% (15% 2015). Neutral or satisfied on all measures, but feel their charges are unfair.
- Cluster 4 – “Dissatisfied” – 9% (7% 2015). This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied.

Evident in the Figure below, there are significantly more customers in the “Very satisfied” cluster for Wales than England (63% vs. 55%) whilst there are significantly less in the “Unfair” cluster compared to England (12% vs. 15%).

Clusters in England remain largely unchanged since 2015. A significant growth in the “Very satisfied” cluster is evident in Wales (63% vs. 58% in 2015); this is coupled with a decline in the proportion of those in the “Neutral” cluster (18% vs. 22%).

Figure 6: Clusters by nation



The main characteristics of each cluster are:

- The “Very satisfied” cluster is significantly more likely to be female (58% vs. 54% male), retired (62% vs. 53% not retired), does not have internet access (65% vs. 56% with internet access), live in a metered household (59% vs. 52% unmetered), have no disability in the household (58% vs. 54% with a disability in the household), do not have children in the household (58% vs. 52% of those with children in the household) and live in a rural location (60% vs. 57% of those in a suburban location and 56% of those in an urban location).
- The “Neutral” cluster is also more likely to be female (22% vs. 19% male) but is more likely to not be retired (21% vs. 17% retired), live in unmetered households (22% vs. 19% of metered households) and to have children (22% vs. 19% without children in the household).
- The “Unfair” cluster is significantly more likely to be male (18% vs. 12% female), not retired (16% vs. 12% retired), live in an unmetered household (16% vs. 14% metered households), does not have a disability (16% vs. 13% with a disability), not in receipt of benefits (16% vs. 12% in receipt of benefits) and to be an owner occupier (16% vs. 13% private renters and 11% Council/Housing Association tenants).
- The “Dissatisfied” cluster does not have many sub-groups that stand out in particular. They do tend to be aged between 30-59 years old (10% vs. 9% average) and live in unmetered households (10% vs. 8% metered households). This cluster is significantly more likely to have a disability in the household (14% vs. 7% without a disability in the household), to receive benefits (12% vs. 7% no benefits) to live in an urban location (10% vs. 7% in a suburban location and 6% rural location) and to be a Council/Housing Association tenant or a private renter (12% and 10% respectively) compared to an owner occupier (7%).

3 Speaking up for water consumers

This section of the report covers customer perception of how much water companies care about the services they provide, the level of trust they have in their water company and their likelihood to recommend their water and/ or sewerage company to friends and family.

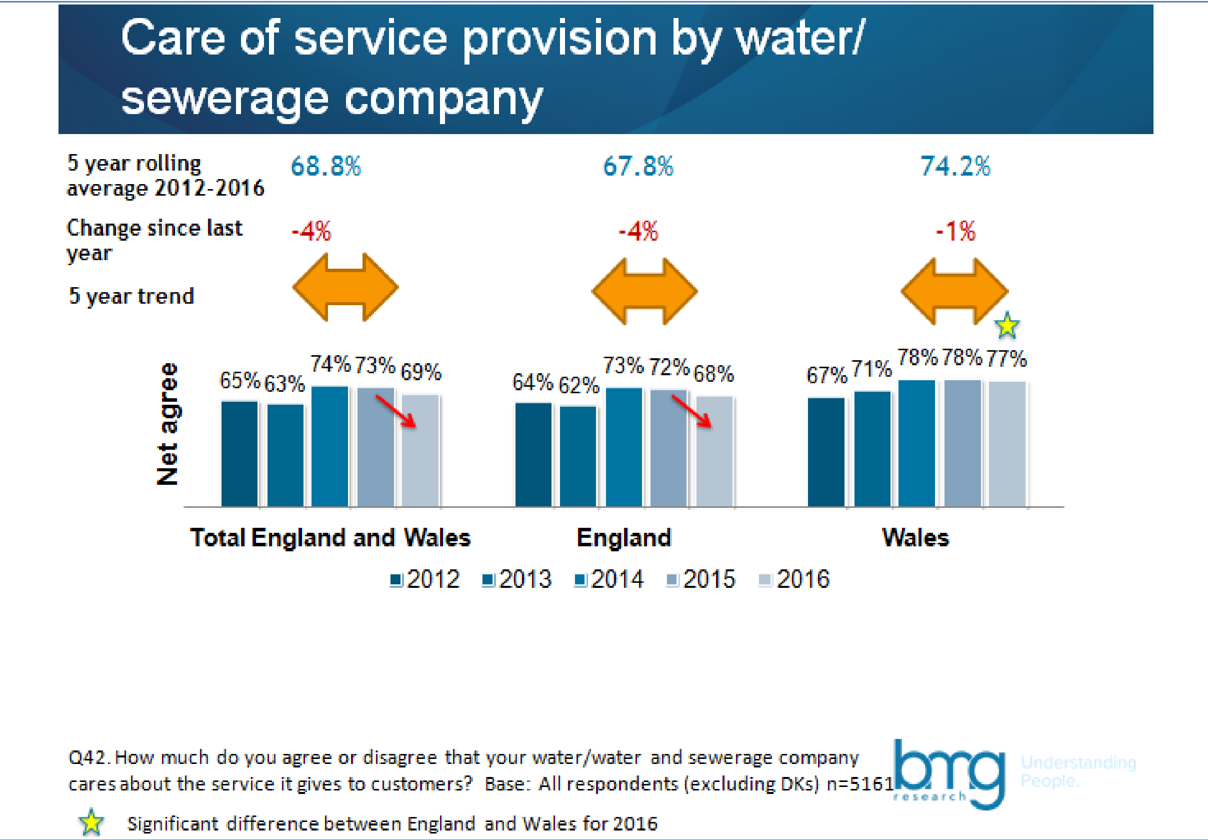
3.1 Caring about service provision

Customers are asked to what extent they agree or disagree that their water company cares about the service it provides to its customers.

The majority (69%) across England and Wales agree that their water company cares about the services they provide. There has been a significant fall of 4% since 2015 but the overall 5 year trend remains stable.

Customers in Wales are significantly more likely to agree that their water company cares about the services it provides compared to customers in England (77% vs. 68%).

Figure 7: Care of service provision



The following groups are significantly more likely to agree that their water company cares about the services they provide:

- Retired customers (74% vs. 65% of those not retired);
- Those without children in the household (70% vs. 66% with children);
- Lowest income households (83% vs. all other incomes with agreement ranging from 70% of those with a household income between £10,000 - £19,999 to 60% of those with a household income of £75,000+);
- Council/ Housing Association tenants (76% vs. 68% owner occupied and 67% private renters);
- Unemployed/ students (78%) and those in routine and manual occupations (74%) vs. those in intermediate occupations and those in higher managerial, administrative and professional occupations (69% and 65%).

The “Very satisfied” cluster is significantly more likely to agree that their water company cares about the services they provide (80% vs. 58% of the “unfair” cluster and 54% of both the “Neutral” and “Dissatisfied” clusters).

Customers are significantly *less* likely to agree that their water company cares about their services if they:

- disagree that it is clear how the final bill is reached (43% vs. 75% agree);
- disagree that charges are fair (44% vs. 82% agree); and,
- have low levels (1 – 4 rating) of trust in their water company (19% vs. 61% who display some level of trust (5-8) and 91% who trust them completely (9-10).

3.1.1 Care of service provision – WaSCs

The total WaSC average for 2016 is 70%. Northumbrian Water has the highest proportion of customers who agree that their company cares about the service they provide to them (79%). Customers of Thames Water display the lowest level of agreement (61%).

For four of the WaSCs, customer perceptions of care have improved significantly over the past 5 years; Welsh Water, Northumbrian Water, Severn Trent and South West Water.

The 5 year rolling averages for Wessex Water and Welsh Water are both significantly higher than the average WaSC 5 year rolling average.

Perceptions of care have fallen significantly for Anglian Water from 77% in 2015 to 68% in 2016.

Figure 8: Care of service provision – WaSCs[7]

Agree water company cares about the service they provide	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	68.8%	65%	63%	74%	73%	69%	↔	n/a	-4%
Total WaSCs (2016 sample: 3305)	69.0%	65%	63%	74%	73%	70%	↔	n/a	-3%
Anglian Water (2016 sample: 400)	69.2%	67%	59%	75%	77%	68%	↔	↔	-9%
Dŵr Cymru Welsh Water (2016 sample: 400)	74.0%	67%	71%	78%	78%	76%	↑	↑	-2%
Northumbrian Water (2016 sample: 200)	75.2%	70%	72%	78%	77%	79%	↑	↔	2%
Severn Trent Water (2016 sample: 400)	69.4%	61%	65%	75%	72%	74%	↑	↔	2%
South West Water (2016 sample: 204)	63.4%	57%	61%	67%	66%	66%	↑	↔	0%
Southern Water (2016 sample: 200)	66.0%	69%	58%	68%	68%	67%	↔	↔	-1%
Thames Water (2016 sample: 200)	63.0%	66%	55%	66%	67%	61%	↔	↔	-6%
United Utilities (2016 sample: 400)	70.2%	64%	65%	78%	75%	69%	↔	↔	-6%
Wessex Water (2016 sample: 501)	74.6%	78%	66%	78%	77%	74%	↔	↑	-3%
Yorkshire Water (2016 sample: 400)	71.2%	63%	66%	80%	75%	72%	↔	↔	-3%

[7] Industry is defined as water industry as a whole, i.e. All WaSCs and WoCs in England and Wales. For an explanation of how to interpret columns arrows please see section 3.4

3.1.2 Care of service provision – WoCs

The total WoC average for 2016 is 65%. Dee Valley Water has the highest proportion of customers who agree that their company cares about the service they provide to their customers (80%). South East Water displays the lowest level of agreement (59%).

There are no significant 5 year trends for any of the WoCs. However, as shown in the Figure below, Cambridge, Dee Valley and Hartlepool Water all have a significantly higher 5 year rolling average than the total WoC average of 66.2%.

There have been a number of significant changes in perceptions of care since 2015, as shown in red in the Figure overleaf. The significant fall of 12% for Bristol Water is driven by an increase in the proportion of respondents who feel neutral (neither agree nor disagree) about whether their company cares about the services they deliver. For South East Water (-11%), and South Staffs Water (-19%) the fall is a mix of more neutrality, and more respondents disagreeing that their company cares about the provision of services.

Figure 9: Care of service provision – WoCs

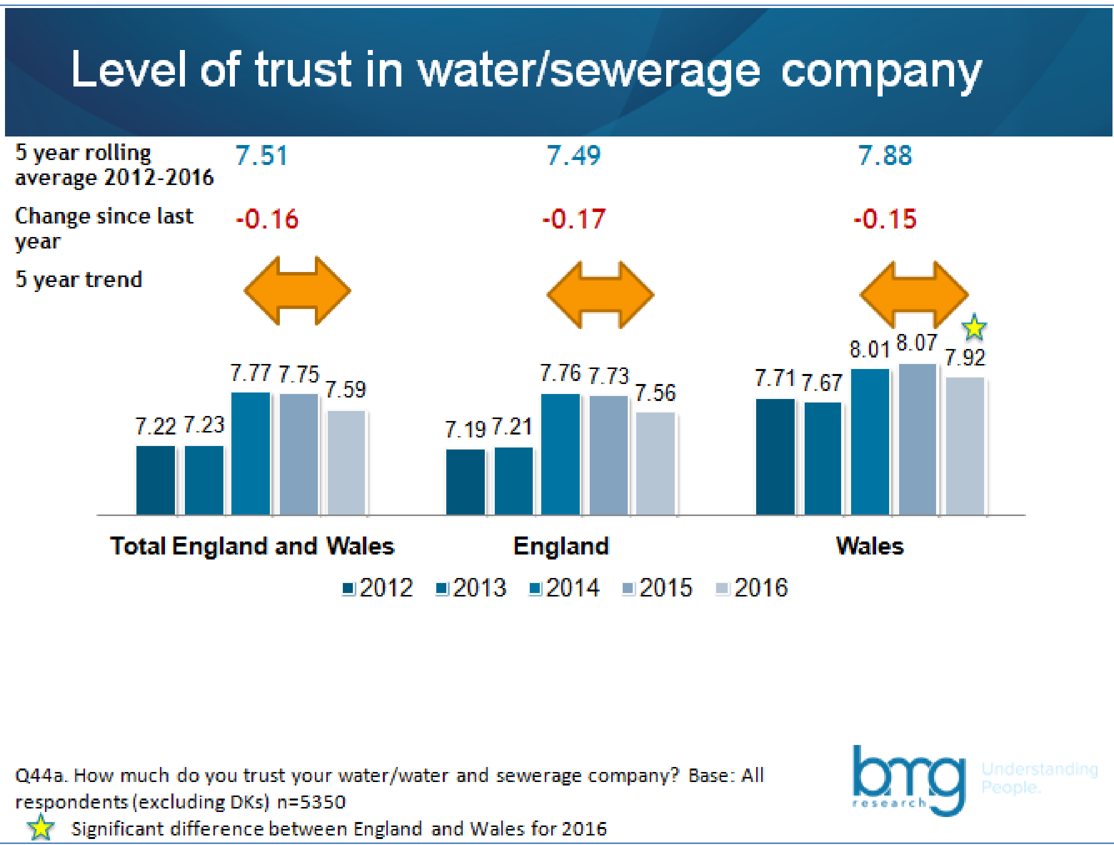
Agree water company cares about the service they provide	5 year rolling average	Five year company trend 2012	2013	2014	2015	2016	Overall 5 year trend	Company Average vs WOC average	Change since last year
Industry (2016 sample: 5420)	68.8%	65%	63%	74%	73%	69%	↔	n/a	-4%
Total WoCs (2016 sample: 2115)	66.2%	62%	61%	72%	71%	65%	↔	n/a	-6%
Affinity Water Central (2016 sample: 150)	59.4%	54%	49%	68%	66%	60%	↔	↔	-6%
Affinity Water East (2016 sample: 150)	64.8%	59%	64%	71%	68%	62%	↔	↔	-6%
Affinity Water South East (2016 sample: 151)	64.0%	65%	53%	72%	66%	64%	↔	↔	-2%
Bournemouth Water (2016 sample: 150)	73.4%	67%	66%	86%	74%	74%	↔	↔	0%
Bristol Water (2016 sample: 152)	73.6%	77%	72%	77%	77%	65%	↔	↔	-12%
Cambridge Water (2016 sample: 154)	75.6%	70%	74%	85%	77%	72%	↔	↑	-5%
Dee Valley Water (2016 sample: 150)	74.0%	68%	65%	80%	77%	80%	↔	↑	3%
Essex & Suffolk Water (2016 sample: 151)	67.0%	66%	68%	67%	66%	68%	↔	↔	2%
Hartlepool Water (2016 sample: 151)	80.0%	76%	78%	86%	84%	76%	↔	↑	-8%
Portsmouth Water (2016 sample: 150)	71.8%	59%	71%	82%	73%	74%	↔	↔	1%
South East Water (2016 sample: 304)	63.4%	62%	57%	69%	70%	59%	↔	↔	-11%
South Staffs Water (2016 sample: 151)	69.2%	64%	67%	72%	81%	62%	↔	↔	-19%
Sutton & East Surrey Water (2016 sample: 151)	68.4%	62%	63%	77%	72%	68%	↔	↔	-4%

3.2 Trust in water/sewerage companies

Customers were asked to what extent they trust their water company on a scale of 1 – 10 with 1 being ‘do not trust them at all’ and 10 being ‘trust them completely’.

The average level of trust is 7.59. The level of trust has fallen significantly since 2015 across both England and Wales (7.59 vs. 7.75 in 2015). However, the overall 5 year trend remains stable. Customers in Wales remain significantly more likely to trust their water company compared to those in England (7.92 vs. 7.56).

Figure 10: Trust in water/sewerage companies



The following are significantly more likely to trust their water company:

- Retired customers (7.83 vs. 7.46 of those who are not retired);
- Those without children in the household (7.68 vs. 7.37 of those with children in the household);
- Those with the lowest incomes (7.95 of those earning less than £10,000 and 7.72 of those earning between £10,000 and £19,999 compared to the average);
- Those living in a rural area (7.73 vs. 7.58 urban and 7.49 suburban).

The “Very satisfied” cluster is significantly more likely to trust their water/ sewerage company (45% rating 9-10 vs. 20% of the “Neutral” cluster, 16% of the “Unfair” cluster and just 12% of the “Dissatisfied” cluster).

The following are significantly *less* likely to trust their water company:

- Those who have contacted their water company in the last 12 months compared to those who have not (7.36 vs. 7.63);
- Those who disagree that their bill is clear about how much needs to be paid and when (6.03 vs. 7.82 who agree their bill is clear);
- Those who are dissatisfied with value for money of water services (5.89 vs. 8.03 satisfied with value for money);
- Those who are dissatisfied with value for money of sewerage services (5.94 vs. 7.98 satisfied with value for money);
- Customers who disagree that their water company cares about the service it provides (4.98 vs. 8.25 who agree that their water company cares).

3.2.1 Trust in water/sewerage companies – WaSCs

As shown in the Figure below, the total WaSC average for 2016 trust is 7.62. In 2016, Northumbrian Water has the highest trust score out of the WaSCs (7.95) whilst customers of South West Water display the lowest level of trust (7.29).

Welsh Water, Northumbrian Water and Wessex Water all have significantly higher 5 year rolling averages (7.89, 7.87 and 7.72 respectively) than the collective WaSC average of 7.52.

South West Water has the lowest 5 year rolling average (7.07); significantly lower than the WaSC 5 year rolling average. Southern Water and Thames Water also have 5 year averages which are significantly lower than the 5 year average.

Despite this, South West shows a significant increase in trust over the last 5 years. Southern Water also displays a significant upward 5 year trend.

The level of trust is significantly different from 2015 where change is highlighted in red in the Figure below.

Figure 11: Trust in water/sewerage companies – WaSCs

Trust water company	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	7.51	7.22	7.23	7.77	7.75	7.59	↔	n/a	-0.16
Total WaSCs (2016 sample: 3305)	7.52	7.25	7.22	7.77	7.73	7.62	↔	n/a	-0.11
Anglian Water (2016 sample: 400)	7.59	7.46	7.20	7.90	7.79	7.60	↔	↔	-0.19
Dŵr Cymru Welsh Water (2016 sample: 400)	7.89	7.72	7.69	8.03	8.06	7.93	↔	↑	-0.13
Northumbrian Water (2016 sample: 200)	7.87	7.37	7.69	8.18	8.15	7.95	↔	↑	-0.20
Severn Trent Water (2016 sample: 400)	7.60	7.38	7.36	7.85	7.69	7.70	↔	↔	0.01
South West Water (2016 sample: 204)	7.07	6.75	6.89	7.16	7.25	7.29	↑	↓	0.04
Southern Water (2016 sample: 200)	7.16	6.82	6.96	7.35	7.28	7.37	↑	↓	0.09
Thames Water (2016 sample: 200)	7.21	7.07	6.93	7.35	7.40	7.31	↔	↓	-0.09
United Utilities (2016 sample: 400)	7.53	7.12	7.03	8.00	7.80	7.72	↔	↔	-0.08
Wessex Water (2016 sample: 501)	7.72	7.49	7.45	7.94	7.97	7.75	↔	↑	-0.22
Yorkshire Water (2016 sample: 400)	7.68	7.28	7.45	7.89	8.05	7.72	↔	↔	-0.33

3.2.2 Trust in water companies – WoCs

The total WoC average for 2016 trust is 7.46. Hartlepool Water has the highest trust score of the WoCs (8.02), and South East Water the lowest (7.21).

Hartlepool Water and South East Water also have the highest and lowest 5 year rolling averages (8.11 and 7.28 respectively).

Three companies, Hartlepool, Cambridge and Dee Valley Water have significantly higher 5 year rolling averages than the aggregate WoC 5 year rolling average (7.50).

As evident in the Figure below, the only WoC with a significant increase in trust levels over the last 5 years is Bournemouth Water.

The level of trust is significantly different from 2015 where change is highlighted in green or red in the Figure below.

Figure 12: Trust in water companies – WoCs

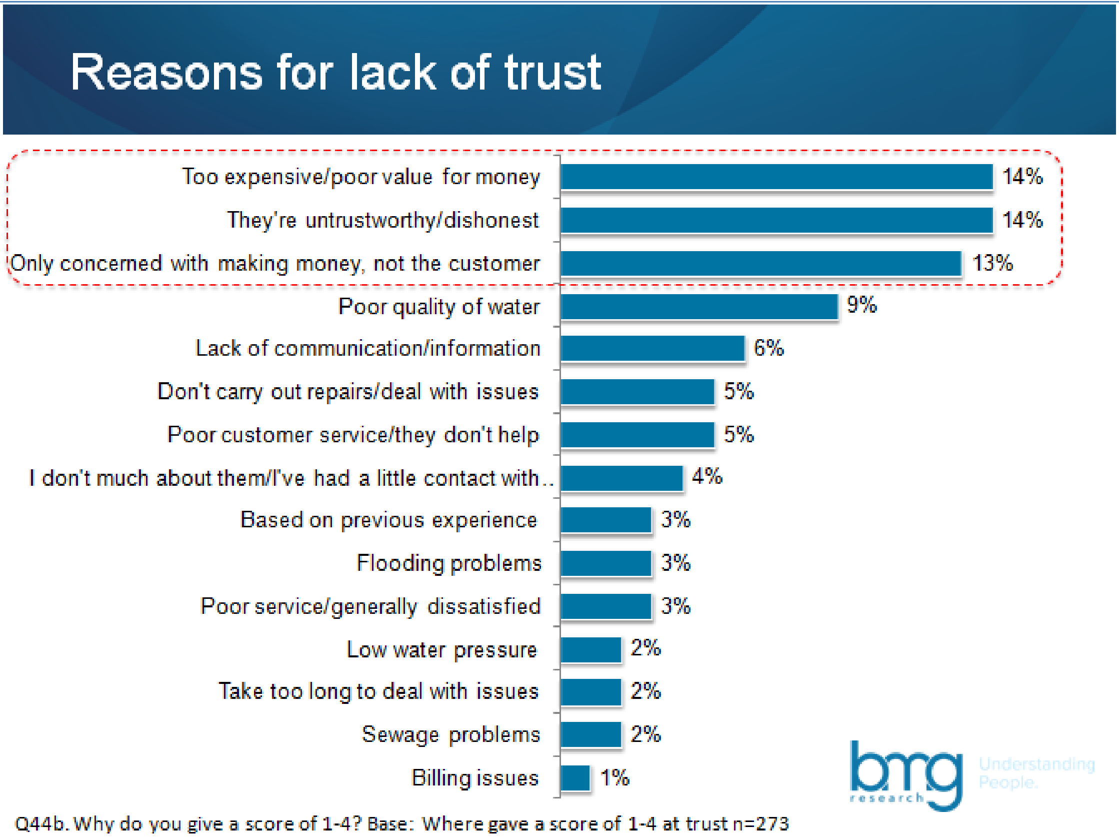
Trust water company	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	7.51	7.22	7.23	7.77	7.75	7.59	↔	n/a	-0.16
Total WoCs (2016 sample: 2115)	7.50	7.14	7.28	7.78	7.83	7.46	↔	n/a	-0.37
Affinity Water Central (2016 sample: 150)	7.38	6.90	7.11	7.74	7.68	7.46	↔	↔	-0.22
Affinity Water East (2016 sample: 150)	7.42	7.13	7.38	7.85	7.22	7.54	↔	↔	0.32
Affinity Water South East (2016 sample: 151)	7.31	7.36	6.83	7.46	7.54	7.34	↔	↔	-0.20
Bournemouth Water (2016 sample: 150)	7.76	7.44	7.47	8.03	7.9	7.95	↑	↔	0.05
Bristol Water (2016 sample: 152)	7.58	7.37	7.66	7.73	7.81	7.32	↔	↔	-0.49
Cambridge Water (2016 sample: 154)	7.76	7.78	7.47	8.19	7.71	7.63	↔	↑	-0.08
Dee Valley Water (2016 sample: 150)	7.79	7.53	7.41	7.80	8.28	7.91	↔	↑	-0.37
Essex & Suffolk Water (2016 sample: 151)	7.57	7.43	7.38	7.63	7.93	7.48	↔	↔	-0.45
Hartlepool Water (2016 sample: 151)	8.11	7.77	7.89	8.55	8.33	8.02	↔	↑	-0.31
Portsmouth Water (2016 sample: 150)	7.64	7.13	7.59	8.19	7.67	7.64	↔	↔	-0.03
South East Water (2016 sample: 304)	7.28	6.82	6.83	7.66	7.87	7.21	↔	↓	-0.45
South Staffs Water (2016 sample: 151)	7.72	7.33	7.69	7.75	8.19	7.62	↔	↔	-0.45
Sutton & East Surrey Water (2016 sample: 151)	7.36	6.81	7.24	7.90	7.61	7.26	↔	↔	-0.35

3.2.3 Reasons for lack of trust

Those who rated their level of trust between 1- 4 are considered to not trust their water company. These respondents were asked why they rated in that way.

The main reasons for distrust are the feeling that water companies are too expensive/ poor value for money and that they are generally untrustworthy/ dishonest (14% each). These reasons were closely followed by the perception that water companies are more concerned with making money than they are about their customers.

Figure 13: Reasons for distrust of water/sewerage company



3.3 Likelihood to recommend water company

Customers are asked, hypothetically speaking, if it were possible to choose their water supplier, how likely they would be to recommend their water company to friends and family on a scale of 0 to 10, with 0 being 'not at all likely to recommend' and 10 being 'extremely likely to recommend'.

Customers rating 0 to 6 are classed as 'detractors', 7 to 8 are 'passives' and 9 to 10 are considered 'promoters'. A Net Promoter Score (NPS) is calculated for each company by subtracting the detractors from the promoters. The higher the NPS, the more positive a customer is towards the water company. A negative score is possible when there are more detractors than promoters.

The industry NPS is +13. The NPS for companies in Wales is significantly higher than for companies in England (+31 vs. +12).

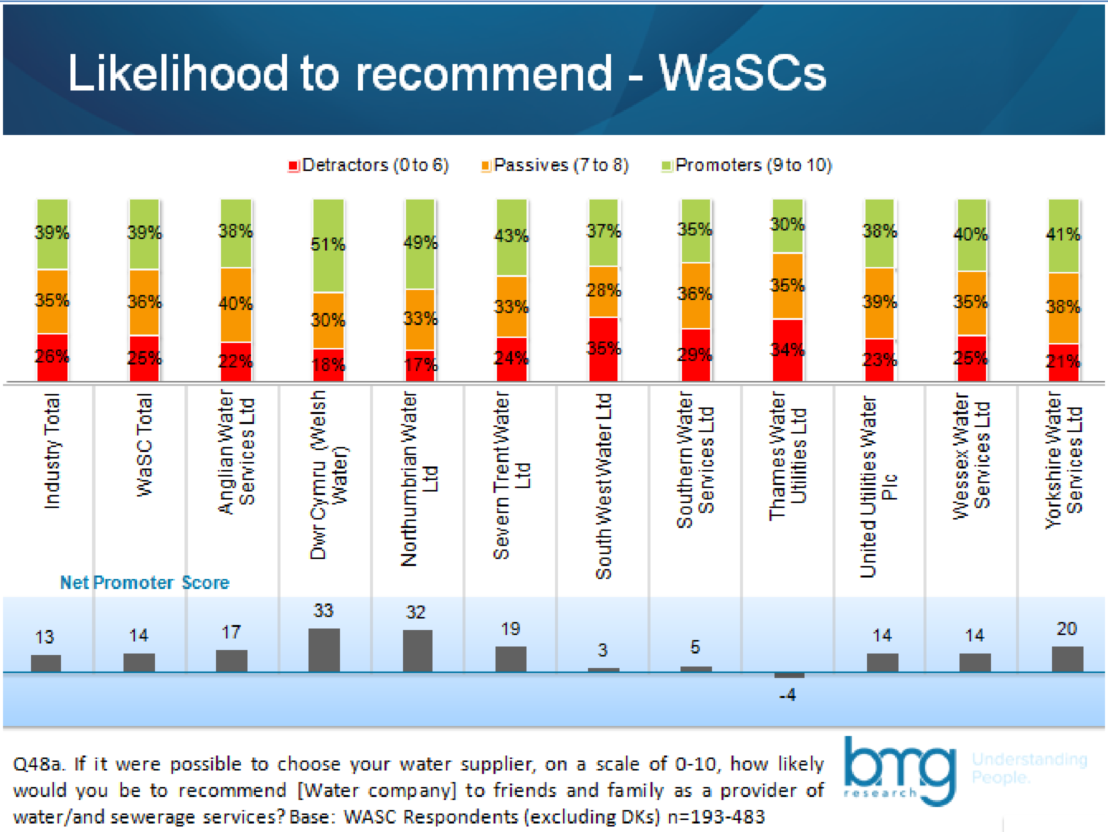
Just under four in ten (39%) are very likely to recommend (scores of 9 or 10), slightly lower than in 2015 (42%). The 2016 NPS for the water industry is +13, significantly lower than the +17 measured in 2015 (+23 in 2014). Scores ranged from -4 to +33 across all WaSCs and WoCs. Only three scored a negative NPS.

The main predictor of NPS is trust and this has fallen at industry level this year. Likelihood to recommend is a sensitive and complex measure and although trust is the main predictor it is affected by views on other aspects of service such as value for money, the hardness/softness of water, perceptions of company care about services, and water pressure to name a few. Please see section 4.4.1 for further analysis of the predictors of NPS.

3.3.1 Likelihood to recommend water company – WaSCs

The average NPS for WaSCs is +14. Welsh Water has the highest NPS (+33), closely followed by Northumbrian Water (+32). Thames Water is the only WaSC to have a negative NPS (-4).

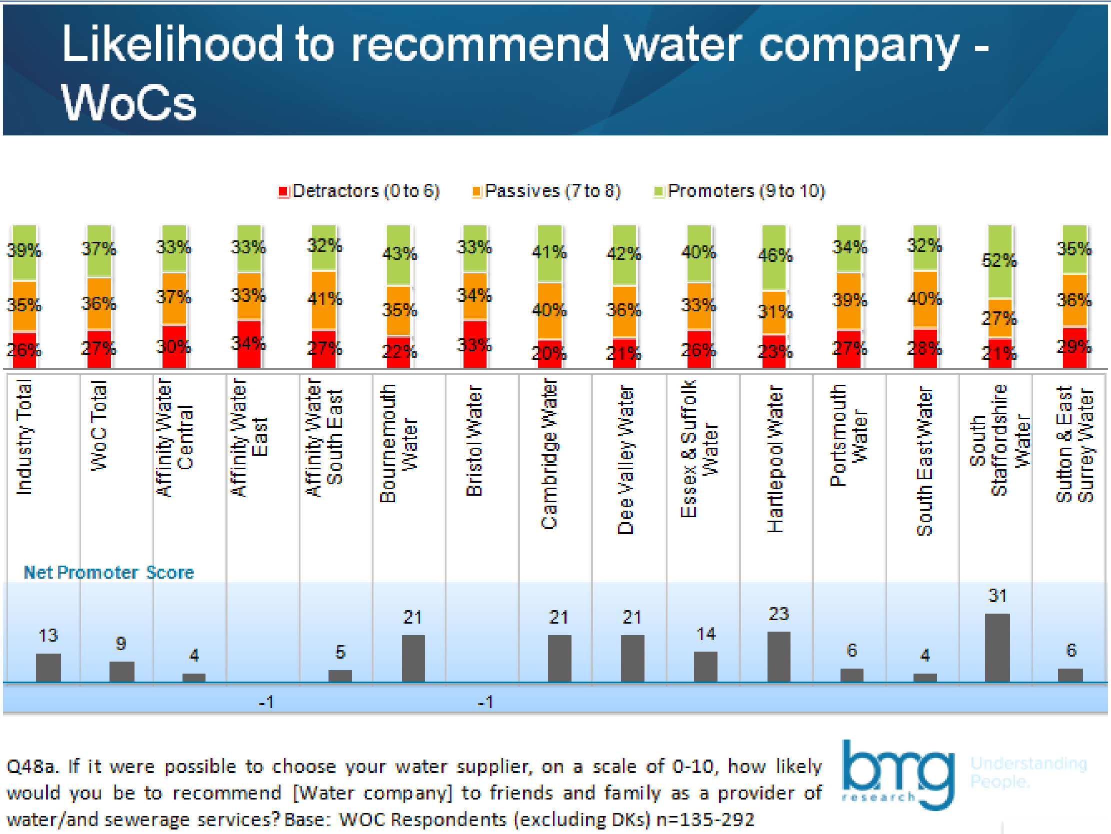
Figure 14: Likelihood to recommend water company – WaSCs



3.3.2 Likelihood to recommend water company – WoCs

The average NPS for WoCs is +9. As shown in the Figure below, South Staffs Water has the highest NPS score (+31) amongst all WoCs meaning that more customers are promoters than detractors of the water company. However, this does represent a decline of -12 points since 2015. Affinity Water East and Bristol Water have a negative NPS score of -1 indicating there are fewer promoters than detractors (NPS for Affinity Water East was +5 in 2015 and Bristol was +23).

Figure 15: Likelihood to recommend water company - WoCs

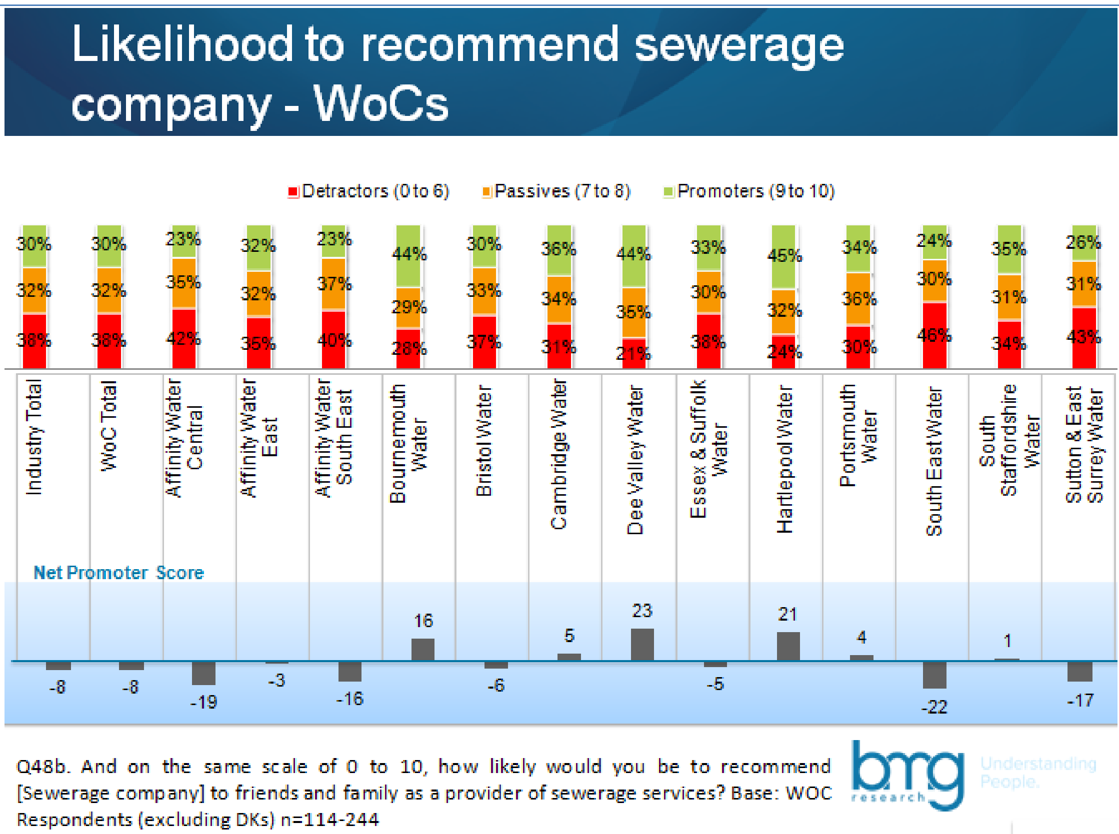


3.3.3 Likelihood to recommend sewerage company – WoCs

Customer's of WoCs were asked how likely they would be to recommend their sewerage service provider to friends and family using the scale of 0 to 10. The industry NPS of customers' likelihood to recommend their sewerage company is -8[8]. Customers in Wales are significantly more likely than those in England to recommend their sewerage company (+24 vs. -9).

As shown in the Figure below, NPS varies greatly from -22 for customers of South East Water where Southern or Thames Water can supply their sewerage service and -19 for Affinity Water Central where Thames supply the majority of customers to +23 for Dee Valley where Welsh Water supply sewerage services to the majority of customers and +21 for Hartlepool Water where Northumbrian Water supply their sewerage services.

Figure 16: Likelihood to recommend sewerage company – WoCs



There is no evidence to suggest a correlation between likelihood to recommend water company and likelihood to recommend sewerage company i.e. where a low NPS for the water company could equate to a low NPS for the sewerage company. Generally speaking, recommendation for the sewerage company is much lower than for recommendation of the water company but this does not necessarily mean that the service is poor. It is likely a result of the need to engage less with the sewerage

[8] Asked only of WoC customers

company compared to the water company and therefore a real sense of judgment in order to recommend has not been formed.

3.4 Key Driver Analysis

Key Driver Analysis (KDA) was undertaken using logistic regression to understand the key predictors for likelihood to recommend the water company as a supplier of water services.

Logistic regression is a classification model. Essentially, a series of rules are built which determine whether a respondent has a high likelihood of being a promoter or non-promoter.

For example, if a respondent has high levels of trust, and agrees that the company cares about customers, and thinks that charges are fair etc., then they are potentially a promoter.

Based on these rules, the model predicts whether respondents are likely to be promoters, and then compares this to whether they actually are or not.

3.4.1 Predicting the likelihood of being a promoter of the water company

The analysis identified what the predictors are of whether a customer would be a promoter or detractor of the water company as a provider of services.

All questions in the survey were initially included as possible predictors. Questions which were subsequently found to be poor at predicting whether a customer would be a promoter were then excluded from the final output. The questions which were excluded as have little predictive power for promoters, in order of the least likelihood to predict are:

- Bill clarity of how the final amount was reached;
- Satisfaction with colour and appearance of the tap water;
- Affordability of charges;
- Confidence in longer-term supply of water
- Bill clarity of how much has to be paid and when;
- Likelihood of contacting if worried about paying a bill;
- Satisfaction with reliability of water supply;
- Satisfaction with the safety of drinking water;
- Satisfaction with contact with the water company.

Evident in the Figure below, trust remains the key predictor of whether or not a customer will promote the water company (trust was also the key predictor in 2015). This is followed by satisfaction with value for money of water services and satisfaction with hardness/ softness of water.

Figure 17: Predictors for being a promoter of water company

Rank	Variable
1	Trust in water company (1st in 2015)
2	Satisfaction - value for money of water services (5th in 2015)
3	Satisfaction - hardness or softness of water (3rd in 2015)
4	Agreement - water company cares about service it gives to customers (6th in 2015)
5	Satisfaction - water pressure (10th in 2015)
6	Satisfaction - Overall water supply (8th in 2015)
7	Agreement - water charges are fair (2nd in 2015)
8	Satisfaction - taste & smell of tap water (not in top 10 in 2015)
9	Whether has water meter (not in top 10 in 2015)
10	Satisfaction - customer service of water company (not asked in 2015)

3.4.2 Predicting the likelihood of being a detractor of the water company

The analysis focuses on understanding what the predictors are of whether or not a customer would be a detractor of the water company as a provider of services.

The analysis included all questions in the model as possible predictors and omits non-significant questions in its final output. Questions found to have little predictive power of a customer being a detractor of a water company are, in order of the least likelihood to predict are:

- Satisfaction with taste and smell;
- Satisfaction with reliability of water supply;
- Satisfaction with hardness/ softness of water;
- Bill clarity of how the final amount was reached;
- Agreement that charges are fair;
- Likelihood of contacting if worried about paying a bill;
- Satisfaction with contact with the water company;
- Satisfaction with the safety of drinking water.

Evident in the Figure below, trust again remains the key predictor of whether or not a customer will be a detractor of the water company; this is followed by overall satisfaction with the water supply and satisfaction with value for money of water services.

Figure 18: Predictors for being a detractor of water company

Rank	Variable
1	Trust in water company (1st in 2015)
2	Satisfaction - Overall water supply (10th in 2015)
3	Satisfaction - value for money of water services (2nd in 2015)
4	Agreement - water company cares about service it gives to customers (3rd in 2015)
5	Satisfaction - customer service of water company (not in top 10 in 2015)
6	Confidence in longer-term water supply without restriction (not in top 10 in 2015)
7	Satisfaction - water pressure (9th in 2015)
8	Agreement - water charges are affordable (4th in 2015)
9	Satisfaction - colour & appearance of tap water (5th in 2015)
10	Agreement - water bill makes it clear how much has to be paid and when (not asked in 2015)
11	Whether has water meter (not in top 10 in 2015)

4 Value for money

This section discusses views on the charges paid for water and sewerage services. Topics include bill clarity, fairness, affordability and value for money.

4.1 Value for money

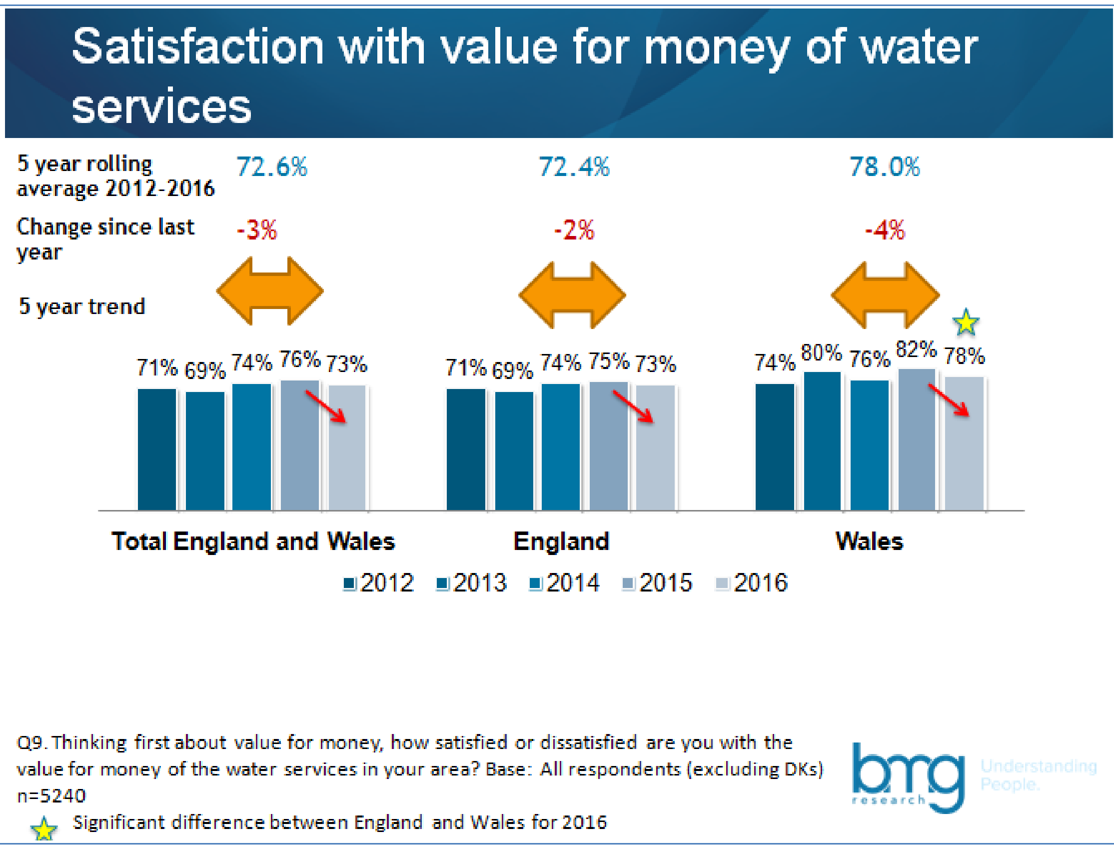
Customers were asked how satisfied they were with the value for money of water and sewerage services in their area.

4.1.1 Water services

More than seven in ten (73%) of customers are satisfied with the value for money of their water services. Customers in Wales are significantly more likely than those in England to be satisfied (78% vs. 73%). The overall 5 year trend is stable as shown in the Figure below.

The fall in satisfaction with value for money of water services since 2015 is significant.

Figure 19: Satisfaction with value for money of water services



The following groups are significantly more likely to be satisfied with the value for money of water services in their area:

- Those who are retired (80% vs. 69% of those not retired);
- Metered households (75% vs. 71% of unmetered households);
- Those without children in the household (76% vs. 67% with children in the household);
- Those living in a rural area (77% vs. 74% urban and 69% suburban).

The “Very satisfied” cluster is significantly more likely to be satisfied with value for money of their water services (94% vs. 66% of the “Neutral” cluster, 28% of the “Unfair” cluster and 23% of the “Dissatisfied” cluster).

The following are significantly *less* likely to be satisfied with the value for money of their water services:

- Customers who are dissatisfied with their water supply (15% vs. 77% satisfied), as are those who are dissatisfied with the customer services of their water company (25% vs. 82% satisfied with customer services);
- Customers who feel that their charges are unfair (29% vs. 92% who agree that charges are fair);
- Those who disagree that the charges are affordable (38% vs. 84% who agree that charges are affordable);
- Those who disagree that their water company cares about the service it provides (35% vs. 83% who agree their water company cares).

Customers who are unaware of the WaterSure tariff are significantly *less* likely to be satisfied with value for money of their water services than those who are aware (72% vs. 77%).

4.1.2 Satisfaction with value for money of water services – WaSCs

The average level of satisfaction with value for money of water services amongst WaSCs for 2016 is 74%. Northumbrian Water has the highest satisfaction with value for money at 84% – a significant improvement on 2015. Customers of South West Water are least likely to be satisfied (65%).

The 5 year rolling total WaSC average is 72.6%. Welsh Water is the only company to have a significantly higher 5 year rolling average than the total WaSC average[9]. South West Water has the lowest of all WaSCs (56.6%) – significantly lower than the average for all WaSCs.

As evident in the Figure below, customer perceptions of the value for money of water services have improved significantly over the last 5 years for Northumbrian Water, Severn Trent Water and Yorkshire Water.

Figure 20: Satisfaction with value for money of water services – WaSCs

Satisfaction with value for money of water services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	72.6%	71%	69%	74%	76%	73%	↔	n/a	-3%
Total WaSCs (2016 sample: 3305)	72.6%	71%	69%	74%	75%	74%	↔	n/a	-1%
Anglian Water (2016 sample: 400)	72.8%	69%	71%	74%	77%	73%	↔	↔	-4%
Dŵr Cymru Welsh Water (2016 sample: 400)	78.0%	74%	81%	75%	82%	78%	↔	↑	-4%
Northumbrian Water (2016 sample: 200)	78.0%	74%	78%	77%	77%	84%	↑	↔	7%
Severn Trent Water (2016 sample: 400)	74.6%	71%	72%	77%	75%	78%	↑	↔	3%
South West Water (2016 sample: 204)	56.6%	53%	51%	56%	58%	65%	↔	↓	7%
Southern Water (2016 sample: 200)	68.8%	68%	68%	70%	66%	72%	↔	↔	6%
Thames Water (2016 sample: 200)	71.2%	79%	63%	70%	74%	70%	↔	↔	-4%
United Utilities (2016 sample: 400)	69.2%	66%	64%	75%	73%	68%	↔	↔	-5%
Wessex Water (2016 sample: 501)	75.2%	73%	74%	78%	76%	75%	↔	↔	-1%
Yorkshire Water (2016 sample: 400)	76.6%	71%	73%	78%	82%	79%	↑	↔	-3%

[9] The rolling average for Northumbrian Water is not significantly different from the total WaSC average due to a less robust base size

4.1.3 Satisfaction with value for money of water services – WoCs

The average level of satisfaction with value for money of water services amongst WoCs for 2016 is 70%. Bournemouth Water has the highest level of satisfaction at 84% with Bristol Water the lowest (62%).

Hartlepool Water is the only WoC to have a significantly higher 5 year average (82.2%) than the overall WoC average (72.6%).

Evident in the figure overleaf, there are some large fluctuations at company level. To understand these fluctuations, the 2016 data was examined in more detail and it was compared to the wider data for this question. It is found that more respondents stated neither satisfied nor dissatisfied compared to 2015 when more respondents stated don't know; don't knows are removed from the analysis. From this we can infer that customers may have a greater level of engagement with their water services (more customers answering as opposed to taking the 'don't know' option) but have not formed enough of an opinion to give an answer either way. It does not suggest that satisfaction levels have declined.

It should also be noted that dissatisfaction with the value for money of water services has increased marginally for WoCs. The level of satisfaction is significantly different from 2015 where change is highlighted in red in the Figure overleaf.

Figure 21: Satisfaction with value for money of water services – WoCs

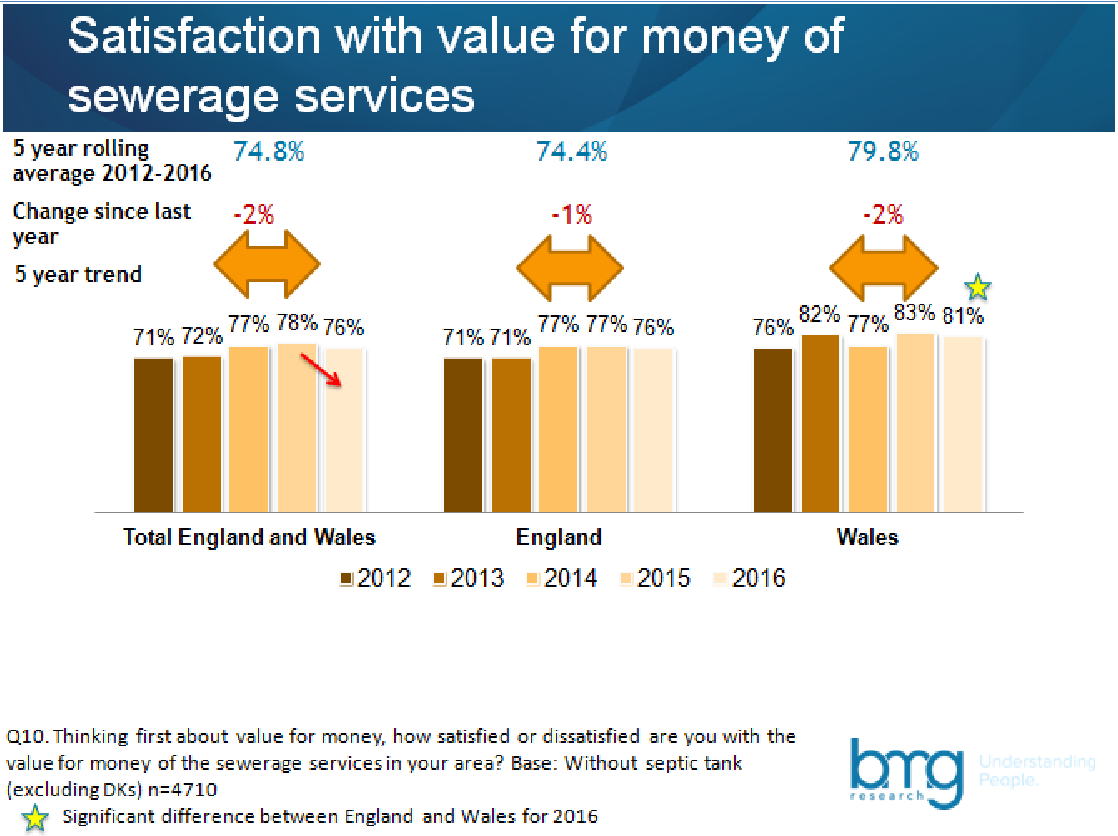
Satisfaction with value for money of water services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	72.6%	71%	69%	74%	76%	73%	↔	n/a	-3%
Total WoCs (2016 sample: 2115)	72.6%	69%	70%	75%	79%	70%	↔	n/a	-9%
Affinity Water Central (2016 sample: 150)	69.4%	64%	62%	74%	78%	69%	↔	↔	-9%
Affinity Water East (2016 sample: 150)	72.8%	71%	77%	78%	71%	67%	↔	↔	-4%
Affinity Water South East (2016 sample: 151)	69.8%	70%	63%	72%	72%	72%	↔	↔	0%
Bournemouth Water (2016 sample: 150)	78.6%	71%	79%	81%	78%	84%	↔	↔	6%
Bristol Water (2016 sample: 152)	71.4%	71%	72%	70%	82%	62%	↔	↔	-20%
Cambridge Water (2016 sample: 154)	78.0%	79%	75%	80%	81%	75%	↔	↔	-6%
Dee Valley Water (2016 sample: 150)	77.6%	71%	71%	86%	80%	80%	↑	↔	0%
Essex & Suffolk Water (2016 sample: 151)	70.0%	66%	72%	75%	70%	67%	↔	↔	-3%
Hartlepool Water (2016 sample: 151)	82.2%	80%	80%	85%	88%	78%	↔	↑	-10%
Portsmouth Water (2016 sample: 150)	80.4%	75%	88%	79%	81%	79%	↔	↔	-2%
South East Water (2016 sample: 304)	71.4%	71%	64%	72%	83%	67%	↔	↔	-16%
South Staffs Water (2016 sample: 151)	76.0%	70%	74%	77%	85%	74%	↔	↔	-11%
Sutton & East Surrey Water (2016 sample: 151)	73.0%	80%	67%	73%	74%	71%	↓	↔	-3%

4.1.4 Sewerage services

Three-quarters (76%) of customers across England and Wales are satisfied with the value for money of the sewerage services in their area; a significant decline on 2015. Customers in Wales are significantly more likely than those in England to be satisfied (81% vs. 76%). The overall 5 year trend remains stable.

As can be seen in the Figure below, customer satisfaction with the value for money of sewerage services has improved over the last 5 years although not significantly so.

Figure 22: Satisfaction with value for money of sewerage services



The following groups of customers are significantly more likely to be satisfied with value for money of sewerage services:

- Retired customers (83% vs. 72% of those who are not retired);
- Those without children in the household (78% vs. 71% with children in the household);
- Those living in a rural location (80% vs. 75% urban and 74% suburban);
- Council/ Housing Association tenants (80% vs. 75% owner occupiers).

The "Very satisfied" cluster is significantly more likely to be satisfied with value for money of their sewerage services (94% vs. 69% of the "Neutral" cluster, 35% of the "Unfair" cluster and 34% of the "Dissatisfied" cluster).

Those who are satisfied with the value for money of their water services are nearly always (96%) satisfied with the value for money of their sewerage services as well.

The following are significantly *less* likely to be satisfied with the value for money of their sewerage charges:

- Customers who disagree that their bill is clear about how much needs to be paid and when (45% vs. 80% who agree);
- Those who disagree that it is clear how the final amount was reached (50% vs. 82% who agree);
- Those who disagree that charges are fair (42% vs. 93% who agree charges are fair);
- Those who disagree that charges are affordable (31% vs. 83% who agree charges are affordable);
- Customers who have made contact with their water company in the last 12 months (71% vs. 77% of those who have not made contact);
- Those receiving separate bills for their water and sewerage services (69% vs. 77% of those who receive combined bills).

4.1.5 Satisfaction with value for money of sewerage services – WaSCs

The average level of satisfaction with value for money of sewerage services amongst WaSCs for 2016 is 77%. Northumbrian Water has the highest level of satisfaction with value for money of sewerage services in 2016 (84%) and South West Water the lowest at just six in ten (60%).

As shown below, Welsh Water is the only WaSC with a significantly higher 5 year average than the total WaSC average (80.0% vs. 75.2%) whilst South West is the only WaSC to report a significantly lower 5 year average (56.0%).

The overall 5 year trend for WaSCs is one of significant improvement; satisfaction with value for money of sewerage services is increasing over time. However at company level, only Severn Trent Water and Yorkshire Water have significantly positive trends.

The level of satisfaction has fallen significantly since 2015 for United Utilities from 80% to 72% in 2016.

Figure 23: Satisfaction with value for money of sewerage services – WaSCs

Satisfaction with value for money of sewerage services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	74.8%	71%	72%	77%	78%	76%	↔	n/a	-2%
Total WaSCs (2016 sample: 3305)	75.2%	72%	72%	77%	78%	77%	↑	n/a	-1%
Anglian Water (2016 sample: 400)	74.6%	69%	72%	76%	80%	76%	↔	↔	-4%
Dŵr Cymru Welsh Water (2016 sample: 400)	80.0%	77%	83%	76%	83%	81%	↔	↑	-2%
Northumbrian Water (2016 sample: 200)	80.0%	77%	80%	80%	79%	84%	↔	↔	5%
Severn Trent Water (2016 sample: 400)	77.0%	73%	74%	79%	79%	80%	↑	↔	1%
South West Water (2016 sample: 204)	56.0%	52%	54%	53%	61%	60%	↔	↓	-1%
Southern Water (2016 sample: 200)	71.2%	68%	74%	72%	69%	73%	↔	↔	4%
Thames Water (2016 sample: 200)	75.0%	78%	67%	76%	76%	78%	↔	↔	2%
United Utilities (2016 sample: 400)	73.0%	67%	68%	78%	80%	72%	↔	↔	-8%
Wessex Water (2016 sample: 501)	77.6%	75%	73%	79%	81%	80%	↔	↔	-1%
Yorkshire Water (2016 sample: 400)	78.4%	70%	75%	82%	83%	82%	↑	↔	-1%

4.1.6 Satisfaction with value for money of sewerage services – WoCs

Satisfaction with the value for money of sewerage services amongst WoCs should be interpreted with care as customers are not rating the water company, but their sewerage service provider. Some WoCs have multiple sewerage service providers within their water supply area.

Customers of Hartlepool Water are most likely to be satisfied with the value for money of sewerage services (84%) whereas Bristol Water customers are least likely (63%); a significant decline on 2015. For Bristol Water and South East Water, satisfaction has fallen significantly since 2015 with both the value for money of water and of sewerage services - Bristol Water -20% water, -18% for sewerage and South East Water -16% water and -13% sewerage.

The 5 year rolling average for WoCs is 72.2%. Only Hartlepool Water is significantly different to the 5 year average (higher at 84.2%). Three companies have improved significantly over the last five years; Affinity Water Central, Bournemouth Water and Dee Valley Water as shown in the Figure below.

Figure 24: Satisfaction with value for money of sewerage services – WoCs

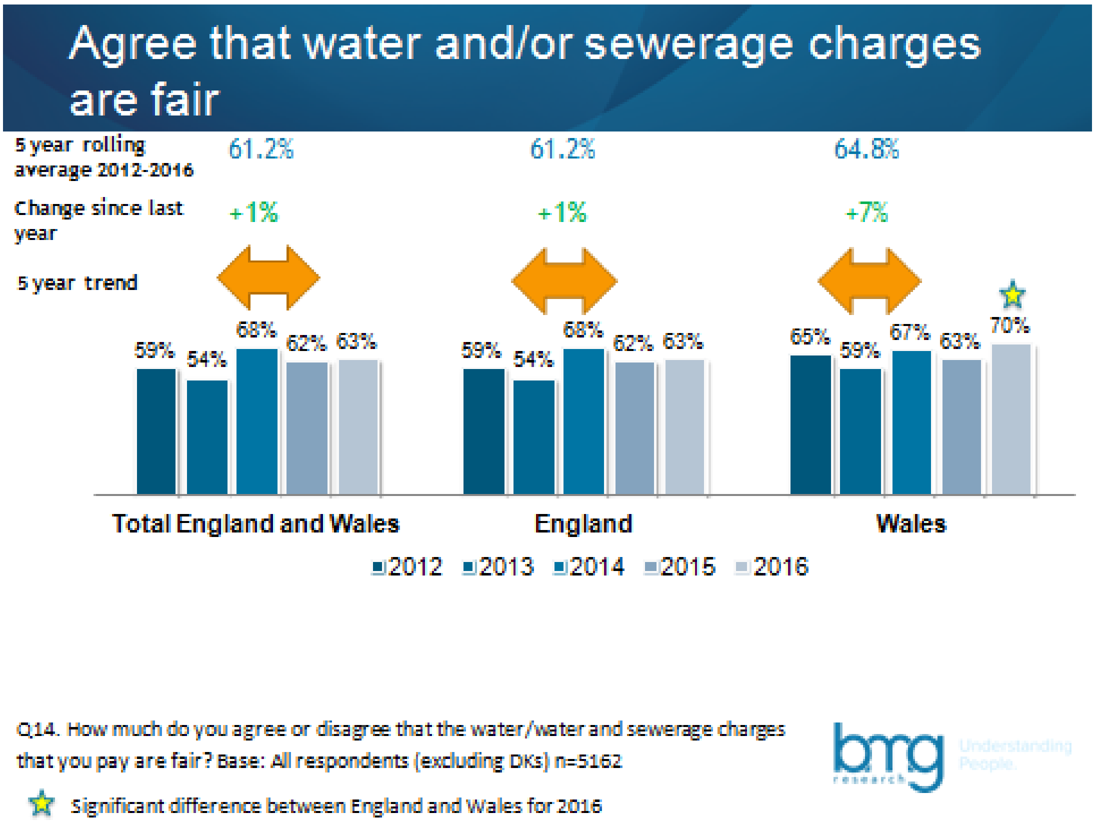
Satisfaction with value for money of sewerage services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	74.8%	71%	72%	77%	78%	76%	↔	n/a	-2%
Total WoCs (2016 sample: 2115)	72.2%	69%	70%	75%	76%	71%	↔	n/a	-5%
Affinity Water Central (2016 sample: 150)	73.0%	70%	71%	75%	74%	75%	↑	↔	1%
Affinity Water East (2016 sample: 150)	72.2%	69%	70%	82%	70%	70%	↔	↔	0%
Affinity Water South East (2016 sample: 151)	67.6%	73%	58%	70%	67%	70%	↔	↔	3%
Bournemouth Water (2016 sample: 150)	73.6%	63%	67%	81%	76%	81%	↑	↔	5%
Bristol Water (2016 sample: 152)	71.6%	68%	76%	70%	81%	63%	↔	↔	-18%
Cambridge Water (2016 sample: 154)	74.2%	74%	69%	77%	75%	76%	↔	↔	1%
Dee Valley Water (2016 sample: 150)	77.6%	69%	70%	83%	83%	83%	↑	↔	0%
Essex & Suffolk Water (2016 sample: 151)	69.2%	61%	71%	74%	70%	70%	↔	↔	0%
Hartlepool Water (2016 sample: 151)	84.2%	83%	82%	86%	86%	84%	↔	↑	-2%
Portsmouth Water (2016 sample: 150)	74.2%	69%	78%	77%	73%	74%	↔	↔	1%
South East Water (2016 sample: 304)	70.0%	71%	63%	73%	78%	65%	↔	↔	-13%
South Staffs Water (2016 sample: 151)	75.6%	66%	74%	80%	83%	75%	↔	↔	-8%
Sutton & East Surrey Water (2016 sample: 151)	73.4%	78%	67%	73%	76%	73%	↔	↔	-3%

4.2 Fairness of charges

Water bill payers are asked how much they agree or disagree that the water/sewerage charges they pay are fair.

More than six in ten (63%) customers agree that the charges they pay are fair. This is in line with 2015, as is the proportion of customers who disagree (17%). Customers in Wales are significantly more likely than those in England to agree that charges are fair (70% vs. 63%). The overall 5 year trend is stable.

Figure 25: Fairness of charges



The following are significantly more likely to agree that their charges are fair:

- Retired customers (70% vs. 60% of those who are not retired);
- Metered households (67% vs. 60% of unmetered households);
    - For metered households specifically, those who requesting a fitting are significantly more likely to agree that prices are fair compared to those who already had a meter fitted and those who were part of a compulsory fitting scheme (75% vs. 65% and 58% respectively);
- Unemployed / students (71% agree vs. 65% intermediate occupations and 62% higher managerial occupations);
- Without children in the household (66% vs. 60% with children).

The “Very satisfied” cluster is significantly more likely to agree their charges are fair (98% vs. 34% of the “Neutral” cluster and less than 0.5% of both the “Unfair” and “Dissatisfied” clusters).

Customers who are dissatisfied with their water service are significantly *less* likely to agree that their charges are fair (12% vs. 67% compared to those who are satisfied). Similarly, those dissatisfied with their sewerage service are significantly *less* likely to agree that the charges they pay are fair (23% vs. 69% compared to those who are satisfied).

In contrast, customers who are aware of the WaterSure tariff are significantly *more* likely to agree that the water/sewerage charges are fair (71% vs. 62% who are unaware). This suggests that there are advantages in terms of customer perception of fairness, in raising awareness more widely than just those who may potentially benefit from WaterSure.

4.2.1 Fairness of charges – WaSCs

Customers of Northumbrian Water are most likely to agree that the charges they pay are fair (73%) whereas customers of South West Water are least likely to agree (46%). South West Water is the only company to display a significantly lower rolling average than the total WoC average.

Southern Water has seen a significant 14% increase in the level of agreement that charges are fair – from 53% in 2015 to 67% in 2016, bringing it more in line with previous years. Severn Trent is the only WaSC where perceptions of the fairness of charges have improved significantly over the last 5 years.

Figure 26: Fairness of charges – WaSCs

Agree that charges are fair	5 year rolling average	Five year company trend 2012	2013	2014	2015	2016	Overall 5 year trend	Company Average vs WASC average	Change since last year
Industry (2016 sample: 5420)	61.2%	59%	54%	68%	62%	63%	↔	n/a	1%
Total WaSCs (2016 sample: 3305)	61.4%	59%	54%	68%	62%	64%	↔	n/a	2%
Anglian Water (2016 sample: 400)	61.4%	57%	54%	68%	64%	64%	↔	↔	0%
Dŵr Cymru Welsh Water (2016 sample: 400)	64.8%	65%	59%	67%	63%	70%	↔	↔	7%
Northumbrian Water (2016 sample: 200)	68.4%	64%	63%	76%	66%	73%	↔	↔	7%
Severn Trent Water (2016 sample: 400)	63.8%	58%	59%	69%	64%	69%	↑	↔	5%
South West Water (2016 sample: 204)	40.6%	43%	29%	46%	39%	46%	↔	↓	7%
Southern Water (2016 sample: 200)	61.0%	60%	57%	68%	53%	67%	↔	↔	14%
Thames Water (2016 sample: 200)	60.6%	65%	53%	67%	60%	58%	↔	↔	-2%
United Utilities (2016 sample: 400)	58.2%	54%	48%	68%	62%	59%	↔	↔	-3%
Wessex Water (2016 sample: 501)	65.8%	71%	57%	69%	65%	67%	↔	↑	2%
Yorkshire Water (2016 sample: 400)	65.4%	59%	59%	71%	67%	71%	↑	↔	4%

4.2.2 Fairness of charges – WoCs

Customers of Bournemouth Water are most likely to find their charges fair (81%) whereas customers of Bristol Water least likely (51%). Hartlepool Water is the only company with a significantly higher rolling average than the total WoC average.

Perceptions that charges are fair have improved significantly for the customers of Bournemouth Water since 2015 (now 81%, was 61% in 2015). The proportion agreeing that charges are fair has fallen significantly for Bristol Water (59% in 2015 to 51% in 2016) and South Staffs Water (75% in 2015 to 62% in 2016).

Figure 27: Fairness of charges - WoCs

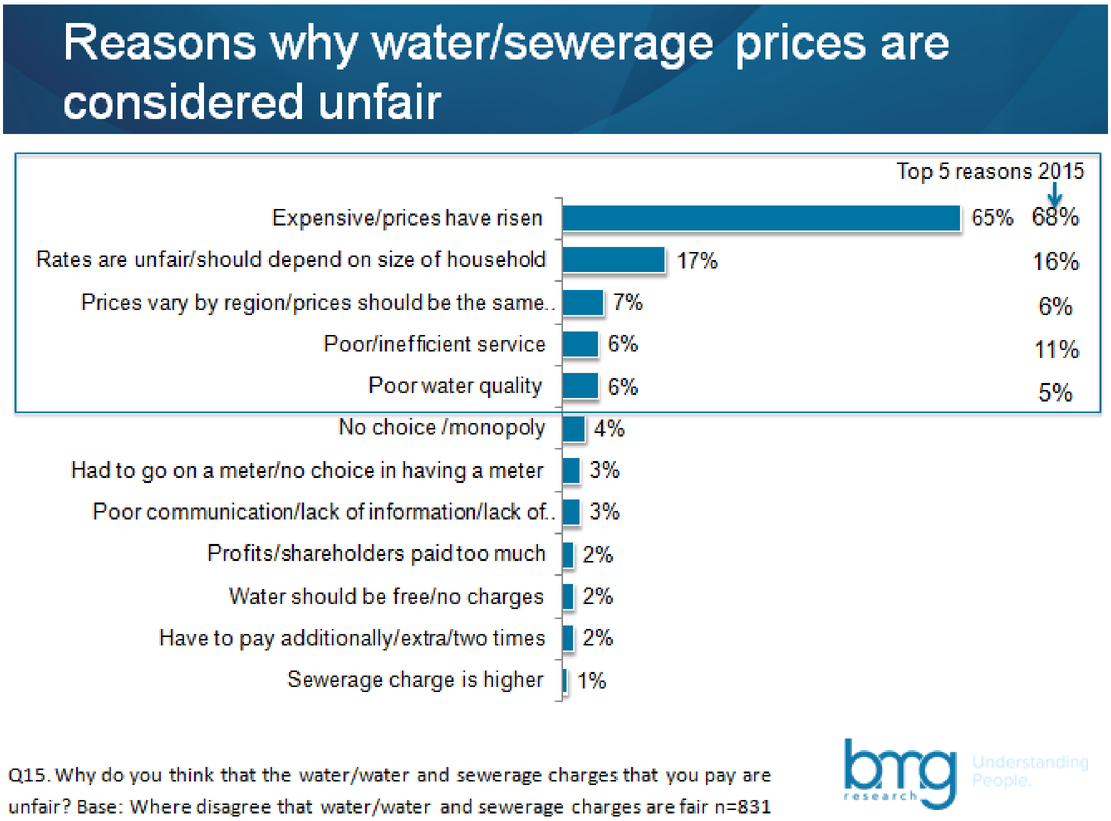
Agree that water/sewerage charges are fair	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	61.2%	59%	54%	68%	62%	63%	↔	n/a	-6%
Total WoCs (2016 sample: 2115)	60.8%	60%	54%	67%	62%	61%	↔	n/a	-1%
Affinity Water Central (2016 sample: 150)	57.0%	54%	53%	62%	57%	59%	↔	↔	2%
Affinity Water East (2016 sample: 150)	61.4%	59%	56%	70%	61%	61%	↔	↔	0%
Affinity Water South East (2016 sample: 151)	59.8%	66%	47%	66%	57%	63%	↔	↔	6%
Bournemouth Water (2016 sample: 150)	69.0%	63%	61%	79%	61%	81%	↔	↔	20%
Bristol Water (2016 sample: 152)	57.2%	61%	51%	64%	59%	51%	↔	↔	-8%
Cambridge Water (2016 sample: 154)	66.4%	70%	56%	72%	67%	67%	↔	↔	0%
Dee Valley Water (2016 sample: 150)	65.8%	66%	56%	70%	66%	71%	↔	↔	5%
Essex & Suffolk Water (2016 sample: 151)	58.4%	55%	58%	63%	58%	58%	↔	↔	0%
Hartlepool Water (2016 sample: 151)	71.6%	66%	66%	83%	74%	69%	↔	↑	-5%
Portsmouth Water (2016 sample: 150)	67.8%	65%	61%	75%	69%	69%	↔	↔	0%
South East Water (2016 sample: 304)	60.0%	60%	50%	66%	64%	60%	↔	↔	-4%
South Staffs Water (2016 sample: 151)	65.0%	66%	51%	71%	75%	62%	↔	↔	-13%
Sutton & East Surrey Water (2016 sample: 151)	63.2%	68%	55%	74%	60%	59%	↔	↔	-1%

4.2.3 Reasons why charges are considered unfair

Those who disagree that the charges they pay are fair are asked their reasons for this.

More than six in ten (65%) state that charges are unfair because of rising prices, this is similar to 2015 (68%). A further 17%, comprising a mix of customers from metered and unmetered households, feel that charges should depend on the size of the household (16% in 2015).

Figure 28: Reasons why charges are considered unfair



Metered households are significantly more likely than unmetered households to feel charges are unfair due to price rises (70% vs. 63%). There are no significant differences in the reasons given for charges being unfair by how the meter was fitted for households where a water meter is present.

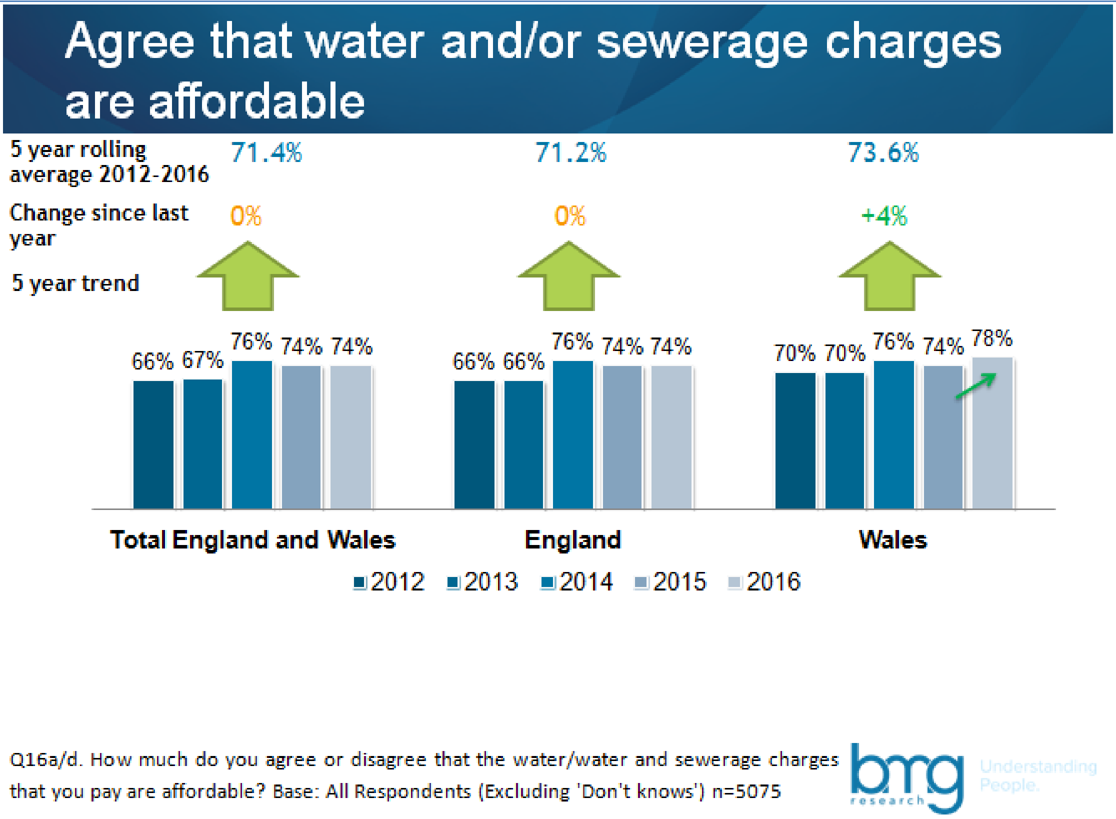
4.3 Affordability of water and sewerage charges

Customers were asked to what extent they agree that the water and/ or sewerage charges they pay are affordable.

Three in four (74%) agree that the water/sewerage charges they pay are affordable whereas 12% disagree; this is in line with 2015. There is no significant difference in perceptions of affordability between England and Wales (74% and 78% respectively).

Perceptions of affordability have improved significantly over the last five years across England and Wales, in England and in Wales.

Figure 29: Affordability of water and sewerage charges



The following groups are significantly more likely to agree that their charges are affordable:

- Retired customers (79% vs. 72% of those who are not retired);
- Higher managerial occupations (78% vs. 74% in intermediate occupations and 71% in routine and manual occupations);
- Those with an income of less than? £10,000 are significantly less likely to agree that charges are affordable (68% vs. 74% across England and Wales);
- Metered households (77% vs. 72% of unmetered households);
- Those who requested their meter fitting (82% vs. 76% of those who already had a meter fitted and 71% of those who were part of the compulsory metering scheme);

- Those without a disability in the household (77% vs. 69% with a disability in the household);
- Those without children in the household (77% vs. 70% with children in the household);
- Those who do not receive benefits (78% vs. 70% of those who receive benefits);
- Owner occupiers (77% vs. 72% of private renters and 70% of Council/Housing Association tenants).

The “Very satisfied” cluster and “Unfair” clusters are most likely to agree that charges are affordable (99% and 83% respectively compared to 25% of the “Neutral” cluster and 0% of the “Dissatisfied” cluster).

The following groups are significantly *less likely* to agree that their charges are affordable:

- Customers who disagree that the charges they pay are fair (36% vs. 92% who agree charges are fair);
- Those with low levels (rated 1-4) of trust in their water (32% vs. 71% with some level of trust (5-8) and 87% who trust their water/sewerage company completely (9-10);
- Those who are unlikely to contact their water company if worried about paying their bill (69% vs. 76% who would be likely to make contact with their water company).

Fewer than two in ten (15%) customers who are *unlikely* to contact their water company if worried about paying a bill disagree that their bills are affordable (vs. 11% who are likely to contact).

4.3.1 Affordability of water and sewerage charges – WaSCs

The WaSC average for 2016 is 75%. Northumbrian Water has the highest proportion of customers who feel their charges are affordable ((83%) whilst South West Water has the lowest (62%).

The 5 year rolling average of 76.8% for Wessex Water is significantly higher than the collective WaSC rolling average of 71.4%.[10]

South West Water has the lowest 5 year rolling average (57.0%) and this is significantly lower than the WaSC average.

As shown in the Figure below, customer perceptions of affordability have improved significantly over the last 5 years for Severn Trent Water, Yorkshire Water and Welsh Water. There are no other significant company trends.

The level of agreement is significantly different from 2015 for some companies; these companies are Northumbrian and Southern Water.

Figure 30: Affordability of water and sewerage charges – WaSCs

Agree that water and/or sewerage charges are affordable	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	71.4%	66%	67%	76%	74%	74%	↑	n/a	0%
Total WaSCs (2016 sample: 3305)	71.0%	66%	66%	76%	74%	73%	↑	n/a	0%
Anglian Water (2016 sample: 400)	72.6%	65%	67%	78%	78%	75%	↔	↔	-3%
Dŵr Cymru Welsh Water (2016 sample: 400)	73.2%	70%	70%	75%	73%	78%	↑	↔	5%
Northumbrian Water (2016 sample: 200)	77.0%	73%	71%	84%	74%	83%	↔	↔	9%
Severn Trent Water (2016 sample: 400)	72.6%	64%	70%	74%	77%	78%	↑	↔	1%
South West Water (2016 sample: 204)	57.0%	56%	48%	58%	61%	62%	↔	↓	1%
Southern Water (2016 sample: 200)	71.4%	64%	69%	79%	68%	77%	↔	↔	9%
Thames Water (2016 sample: 200)	68.2%	69%	64%	72%	67%	69%	↔	↔	2%
United Utilities (2016 sample: 400)	70.8%	65%	62%	78%	76%	73%	↔	↔	-3%
Wessex Water (2016 sample: 501)	76.8%	78%	66%	80%	80%	80%	↔	↑	0%
Yorkshire Water (2016 sample: 400)	74.2%	65%	70%	80%	79%	77%	↑	↔	-2%

[10] Although Northumbrian Water has a higher five year rolling average of 77.0% this is not significantly higher than the WaSC average because of the lower sample size.

4.3.2 Affordability of water and sewerage charges – WoCs

The perceptions of affordability here are based on the total bill received by customers of WoCs. This comprises the water charge from the WoC and the sewerage charge from the company/ies providing sewerage services. Some WoCs have multiple sewerage service providers for their water supply area.

The WoC average for 2016 is 73%. Bournemouth Water has the highest proportion which agrees that water and sewerage charges are affordable in 2016 (89%) whilst both Bristol Water and Essex and Suffolk Water have the lowest (66% each).

Due to low base sizes and little variation from the average, the 5 year rolling averages are not significantly different from the total WoCs average (74.0%).

Affinity Water East is the only WoC to display a significant improvement in perceived affordability over the last 5 years. The level of agreement is significantly different from 2015 for Bournemouth and South Staffs Water.

Figure 31: Affordability of water and sewerage charges – WoCs[11]

Agree that total water and sewerage charges are affordable	5 year rolling average	Five year company trend 2012	2013	2014	2015	2016	Overall 5 year trend	Company Average vs WOC average	Change since last year
Industry (2016 sample: 5420)	71.4%	66%	67%	76%	74%	74%	↑	n/a	0%
Total WoCs (2016 sample: 2115)	74.5%		69%	77%	77%	75%	↔	n/a	-2%
Affinity Water Central (2016 sample: 150)	71.3%		66%	72%	76%	71%	↔	↔	-5%
Affinity Water East (2016 sample: 150)	72.5%		64%	78%	72%	76%	↑	↔	4%
Affinity Water South East (2016 sample: 151)	69.0%		59%	76%	73%	68%	↔	↔	-5%
Bournemouth Water (2016 sample: 150)	80.5%		69%	89%	75%	89%	↔	↔	14%
Bristol Water (2016 sample: 152)	70.3%		67%	74%	74%	66%	↔	↔	-8%
Cambridge Water (2016 sample: 154)	79.8%		80%	81%	79%	79%	↔	↔	0%
Dee Valley Water (2016 sample: 150)	76.8%		70%	79%	79%	79%	↔	↔	0%
Essex & Suffolk Water (2016 sample: 151)	72.5%		73%	78%	73%	66%	↔	↔	-7%
Hartlepool Water (2016 sample: 151)	81.0%		77%	86%	82%	79%	↔	↔	-3%
Portsmouth Water (2016 sample: 150)	79.5%		78%	77%	82%	81%	↔	↔	-1%
South East Water (2016 sample: 304)	74.8%		67%	80%	78%	74%	↔	↔	-4%
South Staffs Water (2016 sample: 151)	76.5%		67%	79%	85%	75%	↔	↔	-10%
Sutton & East Surrey Water (2016 sample: 151)	77.5%		73%	86%	76%	75%	↔	↔	-1%

4.3.3 Affordability of water charges – WoCs

WoC customers are also asked to rate the affordability of their water charges separately. As can be seen in the Figure overleaf, perceived affordability for water charges is similar to that for water and sewerage charges combined.

Bournemouth Water has the highest level of agreement that charges are affordable (89%) whilst Bristol Water has the lowest (65%).

The total 5 year rolling average for WoCs is 74.2%, there are no water companies with significantly higher averages but Cambridge and Hartlepool Water have the highest (81.0% each) whilst Affinity Water Central the lowest (71.0%).

[11] 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. From 2013 WoC Customers were asked to consider the Total affordability

There are no significant 5 year trends by WoC.

As shown below, the level of agreement is significantly different from 2015 for Bournemouth, Bristol and South Staffs Water.

Figure 32: Affordability of water charges – WoCs

Agree that water charges are affordable	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	74.2%	71%	69%	78%	79%	74%	⇔	n/a	-5%
Total WoCs (2016 sample: 2115)	74.2%	71%	69%	78%	79%	74%	⇔	n/a	-5%
Affinity Water Central (2016 sample: 150)	71.0%	67%	63%	73%	78%	74%	⇔	⇔	-4%
Affinity Water East (2016 sample: 150)	71.4%	65%	65%	81%	73%	73%	⇔	⇔	0%
Affinity Water South East (2016 sample: 151)	74.2%	75%	64%	78%	77%	77%	⇔	⇔	0%
Bournemouth Water (2016 sample: 150)	80.0%	73%	73%	88%	77%	89%	⇔	⇔	12%
Bristol Water (2016 sample: 152)	72.0%	74%	68%	76%	77%	65%	⇔	⇔	-12%
Cambridge Water (2016 sample: 154)	81.0%	83%	79%	82%	82%	79%	⇔	⇔	-3%
Dee Valley Water (2016 sample: 150)	77.6%	76%	72%	80%	80%	80%	⇔	⇔	0%
Essex & Suffolk Water (2016 sample: 151)	73.0%	70%	73%	78%	75%	69%	⇔	⇔	-6%
Hartlepool Water (2016 sample: 151)	81.0%	73%	79%	87%	85%	81%	⇔	⇔	-4%
Portsmouth Water (2016 sample: 150)	80.4%	72%	83%	81%	85%	81%	⇔	⇔	-4%
South East Water (2016 sample: 304)	74.8%	71%	71%	79%	79%	74%	⇔	⇔	-5%
South Staffs Water (2016 sample: 151)	76.8%	77%	70%	78%	85%	74%	⇔	⇔	-11%
Sutton & East Surrey Water (2016 sample: 151)	75.6%	73%	67%	85%	77%	76%	⇔	⇔	-1%

4.3.4 Affordability of sewerage charges – WoCs

WoC customers are also asked to rate the affordability of their sewerage charges separately to water charges. As can be seen in the Figure below, perceived affordability of sewerage charges is similar to that for water charges.

Bournemouth Water has the highest proportion of customers who agree that t charges are affordable (87%) whilst Bristol Water has the lowest (66%).

The total 5 year rolling average for WoCs is 73.8% and Hartlepool Water is the only WoC to display a significantly higher rolling average (81.5%).

The level of agreement is significantly different from 2015 for Bournemouth, Bristol, Essex and Suffolk and South Staffs Water.

Figure 33: Affordability of sewerage charges – WoCs

Agree that sewerage charges are affordable	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	73.8%	70%	68%	78%	78%	75%	↑	n/a	-3%
Total WoCs (2016 sample: 2115)	73.8%	70%	68%	78%	78%	75%	↔	n/a	-3%
Affinity Water Central (2016 sample: 150)	70.3%	64%	65%	74%	77%	73%	↔	↔	-4%
Affinity Water East (2016 sample: 150)	70.4%	64%	64%	78%	71%	75%	↔	↔	4%
Affinity Water South East (2016 sample: 151)	71.2%	75%	61%	78%	71%	71%	↔	↔	0%
Bournemouth Water (2016 sample: 150)	77.9%	70%	70%	88%	74%	87%	↔	↔	13%
Bristol Water (2016 sample: 152)	71.9%	74%	67%	75%	77%	66%	↔	↔	-11%
Cambridge Water (2016 sample: 154)	78.9%	79%	76%	82%	81%	77%	↔	↔	-4%
Dee Valley Water (2016 sample: 150)	75.0%	70%	69%	79%	80%	77%	↔	↔	-3%
Essex & Suffolk Water (2016 sample: 151)	72.5%	68%	73%	80%	75%	66%	↔	↔	-9%
Hartlepool Water (2016 sample: 151)	81.5%	74%	75%	88%	87%	84%	↔	↑	-3%
Portsmouth Water (2016 sample: 150)	76.3%	68%	76%	80%	81%	77%	↔	↔	-4%
South East Water (2016 sample: 304)	73.2%	71%	65%	79%	79%	72%	↔	↔	-7%
South Staffs Water (2016 sample: 151)	76.1%	75%	67%	81%	84%	73%	↔	↔	-11%
Sutton & East Surrey Water (2016 sample: 151)	75.7%	75%	71%	83%	75%	75%	↔	↔	0%

4.4 Bill clarity

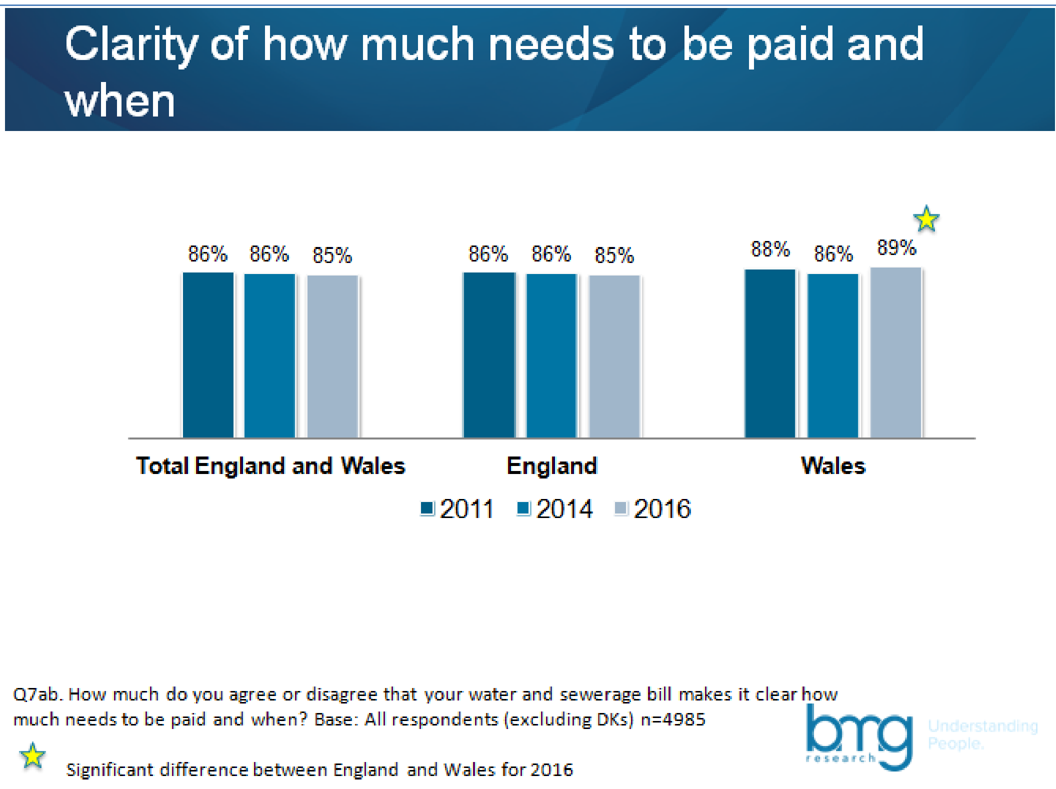
Questions about bill clarity are not included in Water Matters every year. The last time these two questions were asked was in 2014 and previous to that, 2011. These questions ask customers to rate how clear their bill is about how much needs to be paid and when, and also how clear it is how the final amount was reached.

4.4.1 Clarity of how much needs to be paid and when

As can be seen in the Figure below, more than eight in ten (85%) customers agree that it is clear how much needs to be paid and when. This is the same regardless of whether or not customers receive one bill with water and sewerage charges on (85%), or a separate bill for each service (86% water and 84% sewerage). Views are very stable over time.

Customers in Wales are significantly more likely than those in England to agree that it is clear how much needs to be paid and when (89% vs. 85%).

Figure 34: Clarity of how much needs to be paid and when[12]



Customers in the following groups are significantly *more* likely to agree that their bill is clear about how much should be paid and by when:

- Retired customers (89% vs. 83% of those not retired);
- Metered households (87% vs. 83% of unmetered households);

[12] Customers with a combined water and sewerage bill were asked the question once. Those with separate water and sewerage bills were asked questions for each separate bill. For the latter, data has been combined for analysis purposes to form a total figure of bill clarity

- Those without children in the household (87% vs. 81% of those with children);
- Those not in receipt of benefits (86% vs. 83% of those in receipt of benefits);
- Owner occupiers (87% vs. 81% of Council/ Housing Association tenants and 80% of private renters).

In contrast, the following groups of customers are significantly *less* likely to agree their bills are clear how much needs to be paid and when:

- Those who have made contact with their water company in the last 12 months (81% vs. 86% of those who have not made contact);
- Customers who have contacted their water company regarding a billing enquiry (59% vs. 31% who agree their bill is clear).
- Those who consider that their charges are unfair -just 68% of those who disagree their charges are fair agree that their bill is clear compared to 93% who agree that charges are fair.

4.4.2 Clarity of how much needs to be paid and when – WaSCs

Evident in the Figure below, level of agreement that the bill is clear about how much needs to be paid and when is high for all WaSCs. Customers of Welsh Water and Wessex Water are most likely to agree their bill is clear (89% each). Wessex Water is the only company with a significantly higher rolling average than the total WaSC average.

There has been no significant change in the perceptions of clarity regarding how much needs to be paid and when.

Figure 35: Clarity of how much needs to be paid and when – WaSCs

Clarity of how much needs to be paid and when	Rolling average	Company trend						Company Average vs WASC average	Change since 2014
		2011	2012	2013	2014	2015	2016		
Industry (2016 sample: 5420)	85.7%	86%			86%		85%	n/a	-1%
Total WaSCs (2016 sample: 3305)	85.7%	87%			85%		85%	n/a	0%
Anglian Water (2016 sample: 400)	88.4%	89%			89%		87%	↔	-2%
Dŵr Cymru Welsh Water (2016 sample: 400)	88.1%	89%			86%		89%	↔	3%
Northumbrian Water (2016 sample: 200)	85.1%	87%			82%		86%	↔	4%
Severn Trent Water (2016 sample: 400)	84.5%	81%			87%		85%	↔	-2%
South West Water (2016 sample: 204)	89.3%	90%			90%		88%	↔	-2%
Southern Water (2016 sample: 200)	86.7%	88%			85%		87%	↔	2%
Thames Water (2016 sample: 200)	82.7%	87%			81%		80%	↔	-1%
United Utilities (2016 sample: 400)	87.0%	89%			86%		86%	↔	0%
Wessex Water (2016 sample: 501)	89.6%	90%			90%		89%	↑	-1%
Yorkshire Water (2016 sample: 400)	86.1%	84%			88%		86%	↔	-2%

4.4.3 Clarity of how much needs to be paid and when – WoCs

Level of agreement that the bill is clear about how much needs to be paid and when is high for all WoCs. Customers of Bournemouth Water are most likely to agree their bill is clear (92%) whereas customers of Sutton and East Surrey Water, and South East Water are least likely to agree (79%).

The level of agreement is significantly different from 2014 where change is highlighted in red in the Figure below.

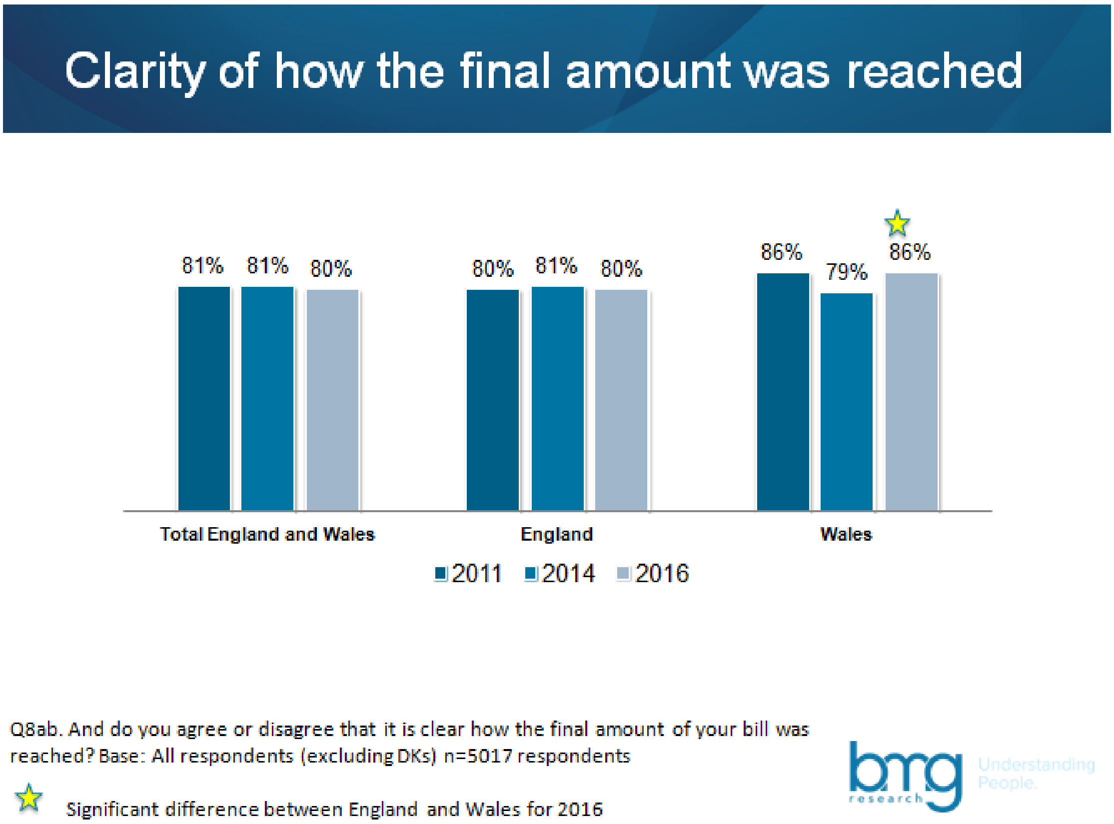
Figure 36: Clarity of how much needs to be paid and when – WoCs

Clarity of how much needs to be paid and when	Rolling average	Company trend						Company Average vs WOC average	Change since 2014
		2011	2012	2013	2014	2015	2016		
Industry (2016 sample: 5420)	85.7%	86%			86%		85%	n/a	-1%
Total WoCs (2016 sample: 2115)	85.3%	86%			86%		84%	n/a	-2%
Affinity Water Central (2016 sample: 150)	81.3%	81%			81%		82%	↔	1%
Affinity Water East (2016 sample: 150)	84.7%	84%			88%		82%	↔	-6%
Affinity Water South East (2016 sample: 151)	84.5%	78%			86%		89%	↔	3%
Bournemouth Water (2016 sample: 150)	89.6%	86%			91%		92%	↔	1%
Bristol Water (2016 sample: 152)	85.2%	82%			87%		86%	↔	-1%
Cambridge Water (2016 sample: 154)	87.2%	85%			92%		85%	↔	-7%
Dee Valley Water (2016 sample: 150)	82.6%	77%			85%		86%	↔	1%
Essex & Suffolk Water (2016 sample: 151)	82.8%	80%			84%		84%	↔	0%
Hartlepool Water (2016 sample: 151)	85.3%	83%			90%		83%	↔	-7%
Portsmouth Water (2016 sample: 150)	88.1%	85%			91%		88%	↔	-3%
South East Water (2016 sample: 304)	83.2%	83%			87%		80%	↔	-7%
South Staffs Water (2016 sample: 151)	81.3%	80%			83%		81%	↔	-2%
Sutton & East Surrey Water (2016 sample: 151)	83.4%	82%			89%		79%	↔	-10%

4.4.4 Clarity of how the final amount was reached

As shown in the Figure below, eight in ten (80%) customers agree that it is clear how the final amount of their bill is reached; similar to 2014 and 20111. Customers in Wales are significantly more likely than those in England to agree it is clear how the final amount was reached (86% vs. 80%). Overall, there is no significant difference in agreement between customers receiving a combined bill or a separate bill (80% vs. 80%). However, where separate bills are received it is worth noting that whilst not significantly different, more customers feel that their water bill is clear how the final amount was reached compared to their sewerage bill (79% vs. 76%).

Figure 37: Clarity of how the final amount was reached[13]



The following groups of customers are significantly more likely to agree that it is clear how the final amount is reached:

- Retired customers (85% vs. 78% of those who are not retired);
- Metered households (84% vs. 77% of unmetered households);
- Those without a disability in the household (81% vs. 78% of those with a disability in the household);

[13] Customers with separate water and sewerage bills were asked questions for each separate bill, whereas those with a combined water and sewerage bill were just asked once. For the latter, the data has been combined for analysis purposes to form a total figure. The analysis approach taken to combine responses is the max approach. More information on this can be found in section 3.4.

- Those without children in the household (83% vs. 75% of those with children in the household);
- Those who do not receive benefits (81% vs. 78% of those in receipt of benefits);
- Owner occupiers (82% vs. 77% of Council/ Housing Association tenants and 75% of private renters).

The “Very satisfied” cluster is significantly more likely to agree that it is clear how the final amount of their bill was reached (92% vs. 69% of the “Neutral” cluster, 67% of the “Unfair” cluster and 51% of the “Dissatisfied” cluster).

The following groups of customers are significantly *less* likely to agree that it is clear how the final amount is reached:

- Those who are dissatisfied with the value for money of their water and sewerage services (53% vs. 87% satisfied with value for money of water services and 58% vs. 87% of those satisfied with value for money of sewerage services).
- Those who do not trust their water/sewerage company at all (44% vs. 78% with some level of trust and 90% who trust their water/sewerage company completely).

4.4.5 Clarity of how the final amount was reached – WaSCs

Amongst WaSCs, customers of Welsh Water and South West Water are most likely to agree that it is clear how the final amount of their bill was reached (87% each) whilst customers of Thames Water are least likely (75%). Wessex Water is the only company with a significantly higher rolling average than the total WaSC average.

The only significant difference in level of agreement from 2014 is with Welsh Water. This change is highlighted in green in the Figure below.

Figure 38: Clarity of how the final amount was reached – WaSCs

Clarity of how final amount was reached	Rolling average	Company trend						Company Average vs WASC average	Change since 2014
		2011	2012	2013	2014	2015	2016		
Industry (2016 sample: 5420)	80.7%	81%			81%		80%	n/a	-1%
Total WaSCs (2016 sample: 3305)	80.7%	81%			80%		81%	n/a	1%
Anglian Water (2016 sample: 400)	83.4%	84%			84%		82%	↔	-2%
Dŵr Cymru Welsh Water (2016 sample: 400)	84.4%	87%			79%		87%	↔	8%
Northumbrian Water (2016 sample: 200)	82.5%	83%			79%		85%	↔	6%
Severn Trent Water (2016 sample: 400)	79.3%	77%			79%		82%	↔	3%
South West Water (2016 sample: 204)	86.3%	86%			86%		87%	↔	1%
Southern Water (2016 sample: 200)	79.5%	78%			81%		80%	↔	-1%
Thames Water (2016 sample: 200)	75.8%	74%			78%		75%	↔	-3%
United Utilities (2016 sample: 400)	80.0%	82%			78%		80%	↔	2%
Wessex Water (2016 sample: 501)	84.5%	84%			84%		85%	↑	1%
Yorkshire Water (2016 sample: 400)	82.8%	84%			83%		82%	↔	-1%

4.4.6 Clarity of how the final amount was reached – WoCs

Customers of Bournemouth Water are most likely to agree their bill is clear (92%) whereas customers of Sutton and South East Water are least likely (71%). Bournemouth Water is the only company with a significantly higher rolling average than the total WoC average.

The level of agreement is significantly different from 2014 where change is highlighted in red in the Figure below.

Figure 39: Clarity of how the final amount was reached – WoCs

Clarity of how final amount was reached	Rolling average	Company trend						Company Average vs WOC average	Change since 2014
		2011	2012	2013	2014	2015	2016		
Industry (2016 sample: 5420)	80.7%	81%			81%		80%	n/a	-1%
Total WoCs (2016 sample: 2115)	79.7%	80%			82%		77%	n/a	-5%
Affinity Water Central (2016 sample: 150)	80.5%	81%			85%		75%	↔	-10%
Affinity Water East (2016 sample: 150)	81.5%	84%			82%		78%	↔	-4%
Affinity Water South East (2016 sample: 151)	78.2%	73%			80%		82%	↔	2%
Bournemouth Water (2016 sample: 150)	91.3%	92%			90%		92%	↑	2%
Bristol Water (2016 sample: 152)	79.1%	78%			81%		78%	↔	-3%
Cambridge Water (2016 sample: 154)	86.0%	84%			91%		83%	↔	-8%
Dee Valley Water (2016 sample: 150)	77.9%	73%			79%		82%	↔	3%
Essex & Suffolk Water (2016 sample: 151)	77.1%	79%			78%		74%	↔	-4%
Hartlepool Water (2016 sample: 151)	81.9%	82%			84%		80%	↔	-4%
Portsmouth Water (2016 sample: 150)	81.6%	81%			88%		76%	↔	-12%
South East Water (2016 sample: 304)	77.8%	78%			79%		76%	↔	-3%
South Staffs Water (2016 sample: 151)	76.7%	79%			74%		77%	↔	3%
Sutton & East Surrey Water (2016 sample: 151)	78.5%	81%			84%		71%	↔	-13%

5 Awareness of WaterSure and additional services

Water companies are obliged to provide schemes specifically designed for low income customers who struggle to afford their bills. Furthermore, water companies are also obliged to offer additional services to customers with specific requirements to ensure accessing services is as easy as possible. This includes the provision of large print or Braille bills, passwords to check that company callers are genuine and liaison with customers on dialysis who need a constant supply of water.

5.1 Awareness of WaterSure/ Welsh Water Assist

To understand awareness of the WaterSure tariff[14], customers were asked if they had ever heard of or were subscribed to this tariff.

There has been a significant increase in those aware of, or subscribed to WaterSure, increasing from 8% in 2015 to 12% in 2016. Awareness is significantly higher in Wales than in England (16% vs. 12%).

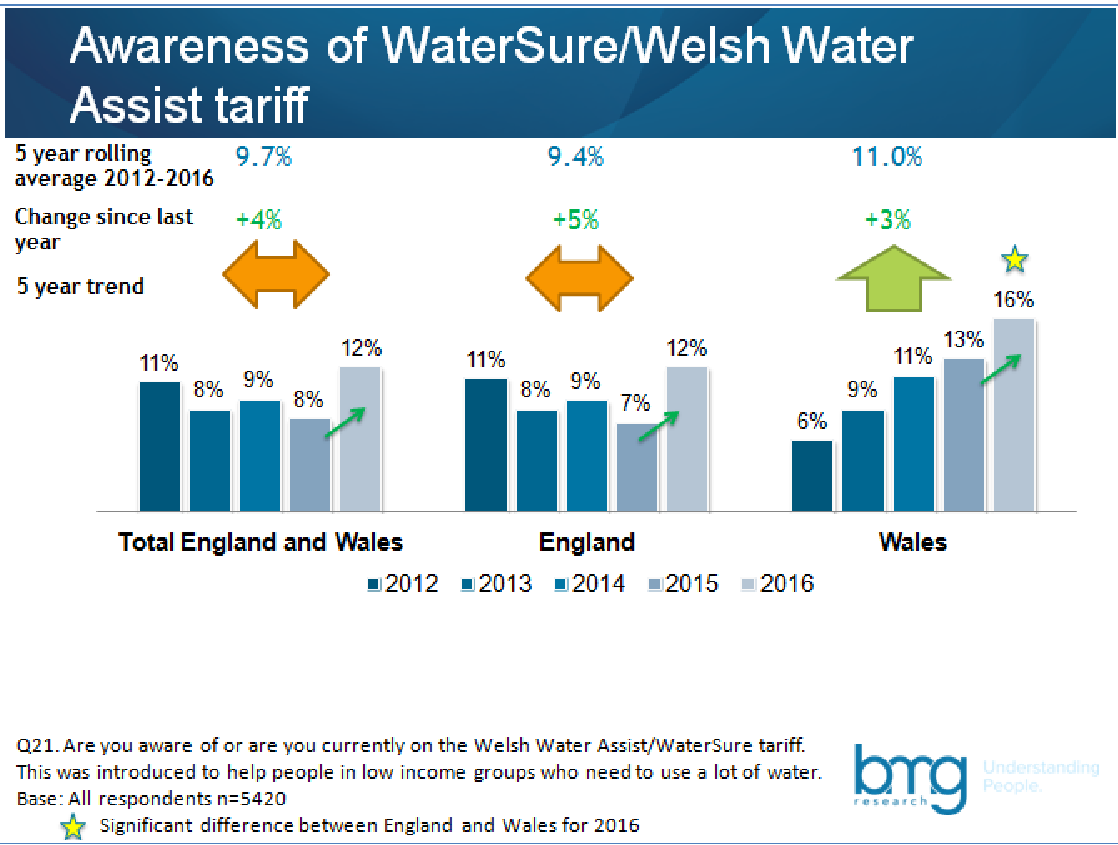
In England and Wales:

- 10% have heard of it but do not need it (13% in Wales, 10% in England);
- 2% have subscribed to it (3% in Wales, 2% in England).

[14] Previously Welsh Water Assist for Welsh Water customers and re-branded to WaterSure Wales 1st April 2015), a scheme designed to help those in low income groups who need to use a lot of water

The Figure below shows that while the overall trend for awareness of the WaterSure tariff is stable, awareness of the tariff in England over the last 5 years is very inconsistent. A significantly positive 5 year trend in awareness of the tariff is evident in Wales.

Figure 40: Awareness of WaterSure/ WaterSure Wales



One in ten (10%) customers across England and Wales has never heard of WaterSure but would like to know more. There is no significant difference between nations although there are slightly more customers in Wales than in England who would like to find out more (12% vs.10% in England).

The “Dissatisfied” cluster is significantly more likely to be unaware and want to know more about the tariff (28% vs. 12% of the “Neutral” cluster, 11% of the “Unfair” cluster and 6% of the “Very satisfied” cluster.

The following groups of customers are significantly more likely to be *unaware* and want to know more:

- Those with a disability in the household (21% vs. 7% of those without a disability);
- Those of an Asian ethnicity (26%), mixed ethnicity (23%) or Black ethnicity (22%) compared to those of a white ethnicity (9%);
- Those with children in the household (12% vs. 10% of those without children in the household);

- Lowest income groups (22% of those with a household income of less than £10,000 and 17% with an income between £10,000 - £19,999 vs. 10% average);
- Those in receipt of benefits (20% vs. 7% who do not receive benefits);
- Those living in an urban location (12% vs. 9% rural and 8% suburban);
- Council/ Housing Association tenants (20% vs. 15% of private renters and 8% of owner occupiers).

Those who disagree that their bills are affordable are also significantly more likely to be unaware of, but want to know more about the WaterSure tariff (27% vs. 7% who agree that bills are affordable).

5.1.1 Awareness of WaterSure/ WaterSure Wales – WaSCs

Awareness of the WaterSure tariff amongst WaSC customers is 12%, an increase of 3% since 2015. Similarly to 2015, awareness of the WaterSure tariff is highest amongst customers of South West Water (19% vs. 17% in 2015) whilst United Utilities has the lowest awareness in 2016 (7%; no change on 2015).

South West Water and Southern Water have 5 year averages which are significantly higher than the total WaSC average.

Awareness of WaterSure amongst customers of Welsh Water and Northumbrian Water has increased significantly over the last five years. There are no significant trends amongst the remaining WaSCs.

The level of awareness is significantly different from 2015 where change is indicated in green in the Figure below.

Figure 41: Awareness of WaterSure/ Welsh Water Assist – WaSCs

Awareness of WaterSure tariff	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	9.7%	11%	8%	9%	8%	12%	↔	n/a	4%
Total WaSCs (2016 sample: 3305)	9.8%	11%	8%	10%	8%	12%	↔	n/a	4%
Anglian Water (2016 sample: 400)	12.2%	10%	13%	10%	12%	16%	↔	↔	4%
Dŵr Cymru Welsh Water (2016 sample: 400)	11.1%	6%	8%	12%	13%	17%	↑	↔	4%
Northumbrian Water (2016 sample: 200)	8.5%	4%	9%	10%	9%	12%	↑	↔	3%
Severn Trent Water (2016 sample: 400)	7.3%	7%	5%	8%	7%	10%	↔	↔	3%
South West Water (2016 sample: 204)	18.6%	23%	19%	17%	17%	19%	↔	↑	2%
Southern Water (2016 sample: 200)	14.9%	28%	14%	11%	9%	14%	↔	↑	5%
Thames Water (2016 sample: 200)	10.7%	19%	4%	9%	8%	15%	↔	↔	8%
United Utilities (2016 sample: 400)	7.3%	5%	9%	10%	7%	7%	↔	↔	0%
Wessex Water (2016 sample: 501)	11.3%	17%	11%	10%	5%	13%	↔	↔	8%
Yorkshire Water (2016 sample: 400)	7.4%	5%	8%	8%	5%	11%	↔	↔	6%

5.1.2 Awareness of WaterSure/ WaterSure Wales – WoCs

The overall awareness of the WaterSure tariff amongst WoCs is 12%, a significant increase of 6% on 2015. Affinity Water East and South East Water have the highest at 19% whilst Sutton and East Surrey has the lowest level of awareness at 7%; a 5% decline on 2015.

The rolling 5 year average for Affinity Water East is significantly higher than the total WoC 5 year rolling average (16.9% vs. 9.4%). Cambridge Water is the only WoC with a significant increase in awareness of the WaterSure tariff over the last five years.

Awareness levels for South East Water have increased significantly from 2015 as shown below.

Figure 42: Awareness of WaterSure/ Welsh Water Assist – WoCs

Awareness of WaterSure tariff	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	9.7%	11%	8%	9%	8%	12%	↔	n/a	4%
Total WoCs (2016 sample: 2115)	9.4%	11%	9%	9%	6%	12%	↔	n/a	6%
Affinity Water Central (2016 sample: 150)	7.0%	5%	7%	7%	4%	11%	↔	↔	7%
Affinity Water East (2016 sample: 150)	16.9%	13%	21%	16%	15%	19%	↔	↑	4%
Affinity Water South East (2016 sample: 151)	14.2%	13%	13%	14%	12%	19%	↔	↔	7%
Bournemouth Water (2016 sample: 150)	10.0%	10%	8%	7%	11%	14%	↔	↔	3%
Bristol Water (2016 sample: 152)	10.0%	13%	9%	10%	7%	11%	↔	↔	4%
Cambridge Water (2016 sample: 154)	8.3%	3%	10%	8%	9%	12%	↑	↔	3%
Dee Valley Water (2016 sample: 150)	9.3%	7%	11%	6%	13%	9%	↔	↔	-4%
Essex & Suffolk Water (2016 sample: 151)	10.4%	12%	13%	9%	7%	11%	↔	↔	4%
Hartlepool Water (2016 sample: 151)	8.6%	8%	9%	9%	6%	11%	↔	↔	5%
Portsmouth Water (2016 sample: 150)	8.7%	16%	6%	7%	5%	9%	↔	↔	4%
South East Water (2016 sample: 304)	10.1%	19%	7%	9%	2%	13%	↔	↔	11%
South Staffs Water (2016 sample: 151)	7.3%	8%	9%	9%	3%	8%	↔	↔	5%
Sutton & East Surrey Water (2016 sample: 151)	10.9%	17%	7%	12%	11%	7%	↔	↔	-4%

5.2 Additional services

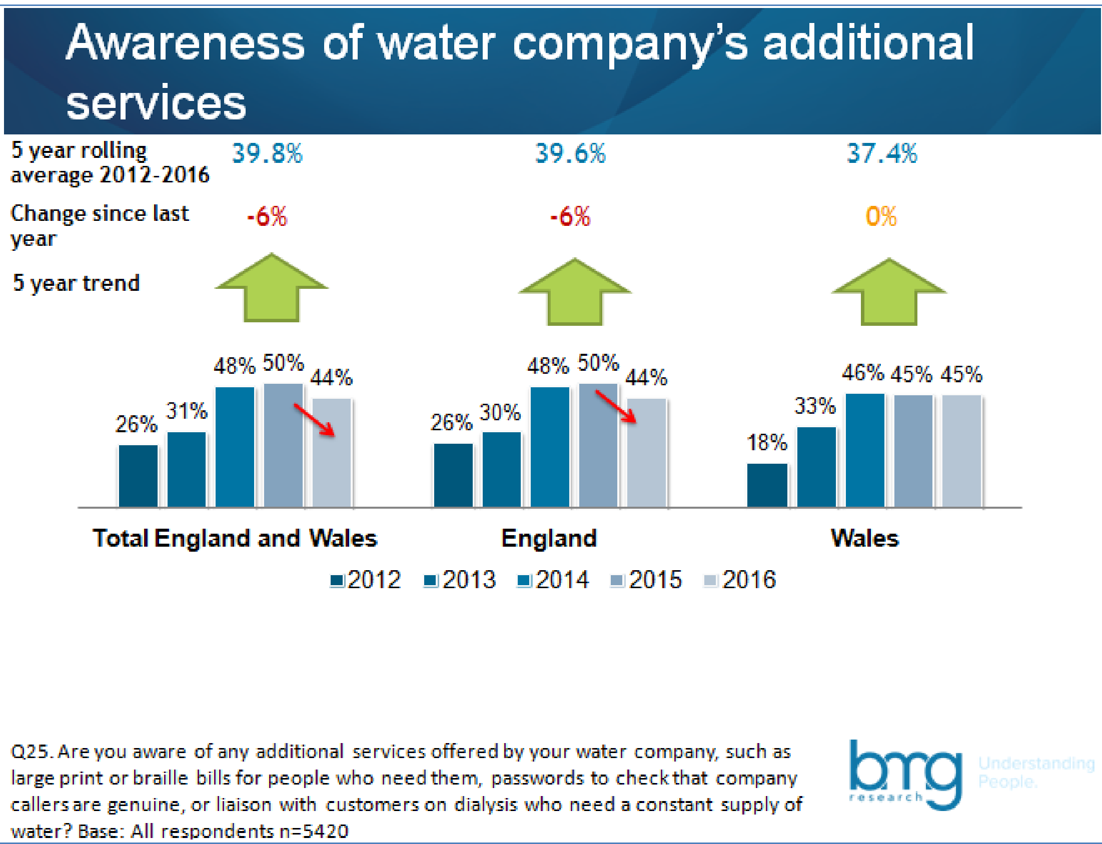
Respondents are asked if they are aware of any additional services provided by their water company such as large print or Braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water.

It should be noted that the question wording changed in 2014 to its current form.[15]

Awareness of additional services has fallen since 2015 by 6%; a significant decline to 44%. From the Figure below it can be seen that this decline is driven by customers in England as awareness remains stable for customers in Wales.

The overall 5 year trend is significantly positive; awareness is improving over time but the question wording change is likely to have had an impact here rather than there being a genuine increase in awareness as the post-2014 trend appears largely stable.

Figure 43: Awareness of additional services



[15] Previous wording was 'Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply.'

Customers with a disability in the household are significantly more likely than those without to be aware of additional services (48% vs. 43%) as are those without children in the household (46% vs. 39% of those with children in the household).

There is a small sub-group of respondents (4%) who are not aware of any additional services offered by their company but who would like to know more. The following are significantly more likely to be unaware *and* want to know more:

- Those of a black ethnicity (22%);
- Customers with a disability in the household (8%);
- Private renters (8%) and Council/ Housing Association tenants (7%);
- Receiving benefits (7%);
- Unemployed/ students (7%);
- Customers without internet access (6%).

5.2.1 Awareness of additional services – WaSCs

The average awareness level for WaSCs in 2016 is 44%. Customers of Severn Trent Water have the highest levels of awareness of additional services (49%). The lowest level of awareness is amongst customers of Thames Water (37%).

Five WaSCs have seen significant increases in awareness over the last five years – they are Welsh Water, Northumbrian Water, Severn Trent, United Utilities and Yorkshire Water.

As shown in the Figure below, the 5 year rolling average for South West Water is significantly higher than the total WaSC average (47.8% vs. 39.4%) for awareness of additional services.

The level of awareness is significantly different from 2015 where change is indicated in red in the Figure below.

Figure 44: Awareness of additional services – WaSCs

Awareness of water company's additional services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	39.8%	26%	31%	48%	50%	44%	↑	n/a	-6%
Total WaSCs (2016 sample: 3305)	39.4%	26%	30%	48%	49%	44%	↑	n/a	-5%
Anglian Water (2016 sample: 400)	43.2%	32%	34%	51%	54%	45%	↔	↔	-9%
Dŵr Cymru Welsh Water (2016 sample: 400)	37.6%	18%	33%	46%	45%	46%	↑	↔	1%
Northumbrian Water (2016 sample: 200)	38.8%	26%	31%	43%	50%	44%	↑	↔	-6%
Severn Trent Water (2016 sample: 400)	39.4%	25%	26%	47%	51%	48%	↑	↔	-3%
South West Water (2016 sample: 204)	47.8%	35%	42%	58%	59%	45%	↔	↑	-14%
Southern Water (2016 sample: 200)	42.2%	34%	35%	51%	52%	39%	↔	↔	-13%
Thames Water (2016 sample: 200)	35.0%	27%	27%	43%	41%	37%	↔	↔	-4%
United Utilities (2016 sample: 400)	39.4%	22%	27%	52%	51%	45%	↑	↔	-6%
Wessex Water (2016 sample: 501)	43.4%	23%	38%	52%	57%	47%	↔	↔	-10%
Yorkshire Water (2016 sample: 400)	40.2%	26%	32%	48%	47%	48%	↑	↔	1%

5.2.2 Awareness of additional services – WoCs

Amongst WoCs, the average awareness level is 45% in 2016. Awareness of additional services is highest amongst customers of Bristol Water and Cambridge Water (52% each) and lowest amongst customers of South Staffs Water (41%).

None of the WoCs are significantly different to the overall WoC average. However, several WoCs have significant upward trends in awareness over the last five years; these are Affinity Water South East, Bristol Water, Cambridge Water, Dee Valley Water, Hartlepool Water, Portsmouth Water and Sutton and East Surrey Water.

There have been some falls in awareness of the water company's additional services since 2015, with South Staffs Water (-15%), Affinity Water Central, Affinity Water East (-11% each) and Bournemouth Water and Essex and Suffolk Water (-10% each) being the largest, South East Water also sees a decline of -9%. Encouragingly, awareness levels are trending up for all WoCs and significantly so for the majority.

Figure 45: Awareness of additional services – WoCs

Awareness of water company's additional services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	39.8%	26%	31%	48%	50%	44%	↑	n/a	-6%
Total WoCs (2016 sample: 2115)	40.4%	23%	32%	50%	52%	45%	↔	n/a	-7%
Affinity Water Central (2016 sample: 150)	36.0%	21%	33%	41%	48%	37%	↔	↔	-11%
Affinity Water East (2016 sample: 150)	43.2%	32%	38%	51%	53%	42%	↔	↔	-11%
Affinity Water South East (2016 sample: 151)	43.0%	21%	33%	56%	54%	51%	↑	↔	-3%
Bournemouth Water (2016 sample: 150)	42.8%	23%	39%	48%	57%	47%	↔	↔	-10%
Bristol Water (2016 sample: 152)	44.4%	24%	38%	55%	53%	52%	↑	↔	-1%
Cambridge Water (2016 sample: 154)	44.0%	24%	35%	50%	59%	52%	↑	↔	-7%
Dee Valley Water (2016 sample: 150)	37.6%	17%	28%	47%	50%	46%	↑	↔	-4%
Essex & Suffolk Water (2016 sample: 151)	41.8%	30%	31%	50%	54%	44%	↔	↔	-10%
Hartlepool Water (2016 sample: 151)	41.4%	23%	36%	47%	53%	48%	↑	↔	-5%
Portsmouth Water (2016 sample: 150)	41.6%	21%	35%	49%	54%	49%	↑	↔	-5%
South East Water (2016 sample: 304)	41.6%	25%	30%	59%	52%	42%	↔	↔	-10%
South Staffs Water (2016 sample: 151)	39.4%	19%	33%	48%	56%	41%	↔	↔	-15%
Sutton & East Surrey Water (2016 sample: 151)	36.4%	21%	23%	51%	46%	41%	↑	↔	-5%

5.3 Awareness of company specific social tariff schemes

Respondents are also asked if they are aware of any other company specific schemes designed to provide lower charges for customers who struggle to pay their bills. Awareness of such schemes is low at just 5% (vs. 4% in 2015). The seemingly low levels of awareness will in part reflect that social tariffs are aimed at a relatively small group of customers who struggle financially. Those who are significantly more likely than the average to be aware of such schemes are identified below:

- Those with a household income of less than £10,000 a year (10%);
- Those in receipt of benefits (8%);
- Council/Housing Association tenants (8%);
- Those with a disability in the household (7%);
- The unemployed/students and those in routine manual occupations (7%).

5.3.1 Awareness of company specific social tariff schemes – WaSCs

There is little variation between WaSCs in awareness of company specific social tariff schemes, with average awareness at 5%. Customers of Anglian Water are most likely to be aware of social tariff schemes with one in ten (10%) stating some awareness. For the majority, an acknowledgement of schemes existing is the extent of customer awareness and specific schemes cannot be named. The Lite tariff, Anglian Water Assistance Fund and Aquacare Plus were mentioned by 1% of their customers.

Figure 46: Awareness of company specific social tariff schemes – WaSCs

	% aware
Industry (2016 sample: 5420)	5%
Total WaSCs (2016 sample: 3305)	5%
Anglian Water (2016 sample: 400)	10%
Dŵr Cymru Welsh Water (2016 sample: 400)	6%
Northumbrian Water (2016 sample: 200)	5%
Severn Trent Water (2016 sample: 400)	4%
South West Water (2016 sample: 204)	6%
Southern Water (2016 sample: 200)	6%
Thames Water (2016 sample: 200)	4%
United Utilities (2016 sample: 400)	6%
Wessex Water (2016 sample: 501)	5%

Yorkshire Water (2016 sample: 400)	4%

5.3.2 Awareness of company specific social tariff schemes – WoCs

Overall, there is little variation between WoCs in awareness of company specific social tariff schemes, with average awareness at 5%. Customers of Bournemouth Water are most likely to be aware of social tariff schemes with 9% stating some awareness; none of these customers were able to name a specific scheme. Sutton and East Surrey Water have the lowest awareness levels of other company schemes for those who struggle to afford their bills with just 1% awareness.

Figure 47: Awareness of company specific social tariff schemes – WoCs

	% aware
Industry (2016 sample: 5420)	5%
Total WoCs (2016 sample: 2115)	5%
Affinity Water Central (2016 sample: 150)	4%
Affinity Water East (2016 sample: 150)	7%
Affinity Water South East (2016 sample: 151)	7%
Bournemouth Water (2016 sample: 150)	9%
Bristol Water (2016 sample: 152)	3%
Cambridge Water (2016 sample: 154)	5%
Dee Valley Water (2016 sample: 150)	5%
Essex & Suffolk Water (2016 sample: 151)	6%
Hartlepool Water (2016 sample: 151)	4%
Portsmouth Water (2016 sample: 150)	3%
South East Water (2016 sample: 304)	5%
South Staffs Water (2016 sample: 151)	6%
Sutton & East Surrey Water (2016 sample: 151)	1%

5.4 Water meters

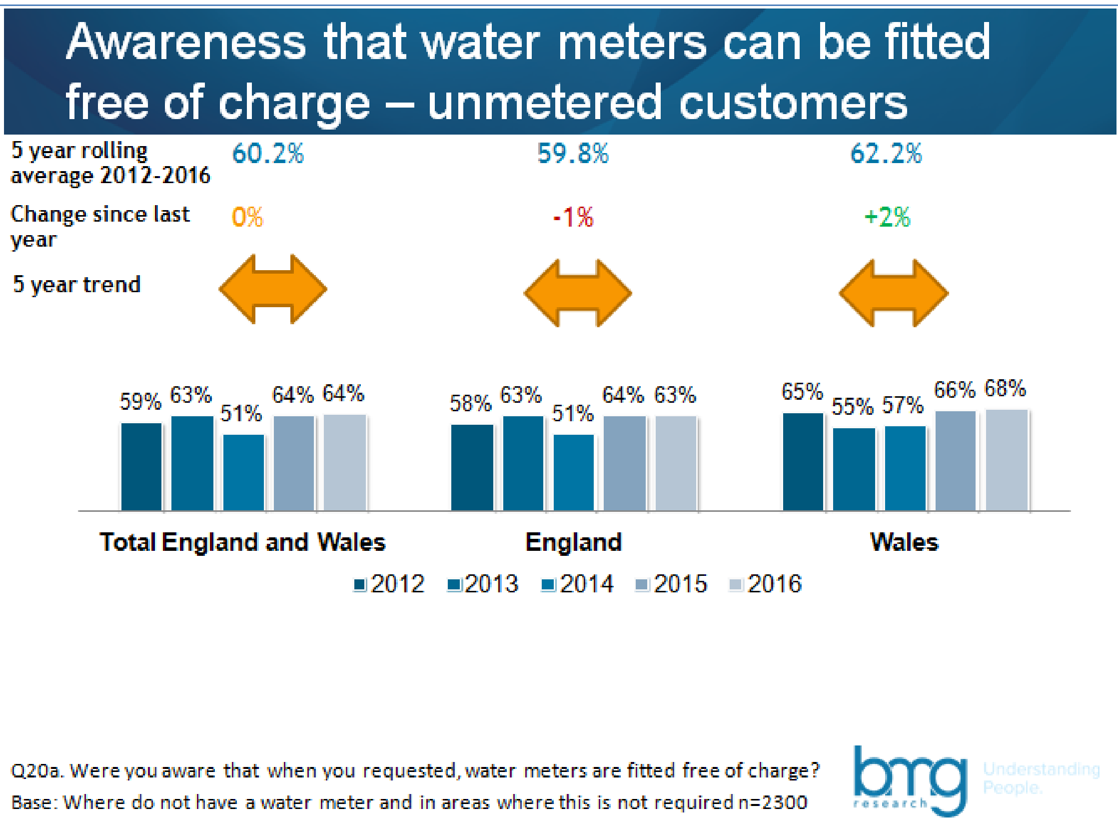
5.4.1 Requesting a water meter – unmetered customers

Customers who do not have a meter installed at their property are asked a set of questions relating to meter installation such as awareness that meters can be fitted free of charge and awareness of a trial period.

More than six in ten (64%) of unmetered customers are aware that if requested, water meters will be fitted free of charge, with no movement in awareness levels since 2015. There is no significant change in the five year trend which continues to be stable.

Awareness in Wales is not significantly different to awareness of customers in England.

Figure 48: Awareness that water meters can be fitted free of charge – unmetered customers



5.4.2 Awareness that water meters can be fitted free of charge – WaSCs[16]

The total WaSC average awareness remains unchanged compared to 2015 at 63%. South West Water has the highest level of awareness at 73% whilst Severn Trent has the lowest (56%).

The 5 year rolling average for Anglian, South West and Wessex Water is significantly higher than the total WaSC average, as can be seen in the Figure below.

The level of awareness is significantly different from 2015 where change is indicated in red in the Figure below.

Figure 49: Awareness that water meters can be fitted free of charge – WaSCs

Awareness of free water meter scheme	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	60.2%	59%	63%	51%	64%	64%	↔	n/a	0%
Total WaSCs (2016 sample: 3305)	59.4%	58%	62%	51%	63%	63%	↔	n/a	0%
Anglian Water (2016 sample: 400)	69.0%	65%	72%	73%	71%	64%	↔	↑	-7%
Dŵr Cymru Welsh Water (2016 sample: 400)	62.6%	66%	54%	57%	67%	69%	↔	↔	2%
Northumbrian Water (2016 sample: 200)	57.6%	57%	61%	42%	60%	68%	↔	↔	8%
Severn Trent Water (2016 sample: 400)	56.8%	60%	58%	46%	64%	56%	↔	↔	-8%
South West Water (2016 sample: 204)	78.8%	72%	88%	75%	86%	73%	↔	↑	-13%
Thames Water (2016 sample: 200)	53.2%	49%	61%	40%	57%	59%	↔	↔	2%
United Utilities (2016 sample: 400)	63.6%	59%	67%	57%	66%	69%	↔	↔	3%
Wessex Water (2016 sample: 501)	64.4%	63%	67%	59%	65%	68%	↔	↑	3%
Yorkshire Water (2016 sample: 400)	57.2%	55%	55%	51%	61%	64%	↔	↔	3%

[16] Customers of Southern Water and some of Thames Water are excluded from this question because of the company's compulsory metering scheme

5.4.3 Awareness that water meters can be fitted free of charge – WoCs[17]

The total WoC average is unchanged compared to 2015 at 65%. Essex and Suffolk Water has the highest level of awareness at 75% whilst Affinity Water Central has the lowest at 52%. .

None of the WoCs are significantly different to the overall WoC average and there are no significant trends for changes in awareness for WoCs over the last five years.

The level of awareness is significantly different from 2015 for Sutton and East Surrey Water.

Figure 50: Awareness that water meters can be fitted free of charge – WoCs

Awareness of free water meter scheme	5 year rolling average	Five year company trend 2012	2013	2014	2015	2016	Overall 5 year trend	Company Average vs WOC average	Change since last year
Industry (2016 sample: 5420)	60.2%	59%	63%	51%	64%	64%	↔	n/a	0%
Total WoCs (2016 sample: 2115)	62.4%	63%	67%	52%	65%	65%	↔	n/a	0%
Affinity Water Central (2016 sample: 150)	58.8%	64%	69%	50%	59%	52%	↔	↔	-7%
Affinity Water East (2016 sample: 150)	63.2%	61%	76%	60%	62%	57%	↔	↔	-5%
Bournemouth Water (2016 sample: 150)	66.0%	74%	74%	49%	68%	65%	↔	↔	-3%
Bristol Water (2016 sample: 152)	66.4%	67%	70%	58%	72%	65%	↔	↔	-7%
Cambridge Water (2016 sample: 154)	59.8%	54%	59%	53%	69%	64%	↔	↔	-5%
Dee Valley Water (2016 sample: 150)	63.4%	59%	70%	56%	64%	68%	↔	↔	4%
Essex & Suffolk Water (2016 sample: 151)	70.0%	67%	70%	63%	75%	75%	↔	↔	0%
Hartlepool Water (2016 sample: 151)	57.4%	46%	62%	52%	64%	63%	↔	↔	-1%
Portsmouth Water (2016 sample: 150)	55.8%	46%	62%	44%	63%	64%	↔	↔	1%
South Staffs Water (2016 sample: 151)	59.0%	64%	63%	43%	62%	63%	↔	↔	1%
Sutton & East Surrey Water (2016 sample: 151)	61.6%	57%	62%	54%	61%	74%	↔	↔	13%

[17] All customers of Affinity Water South East Water and South East as well as some of Affinity Water Central and Affinity Water East are excluded from this question because of the companies' compulsory metering schemes

5.4.4 Awareness of the possibility to trial a water meter – unmetered customers

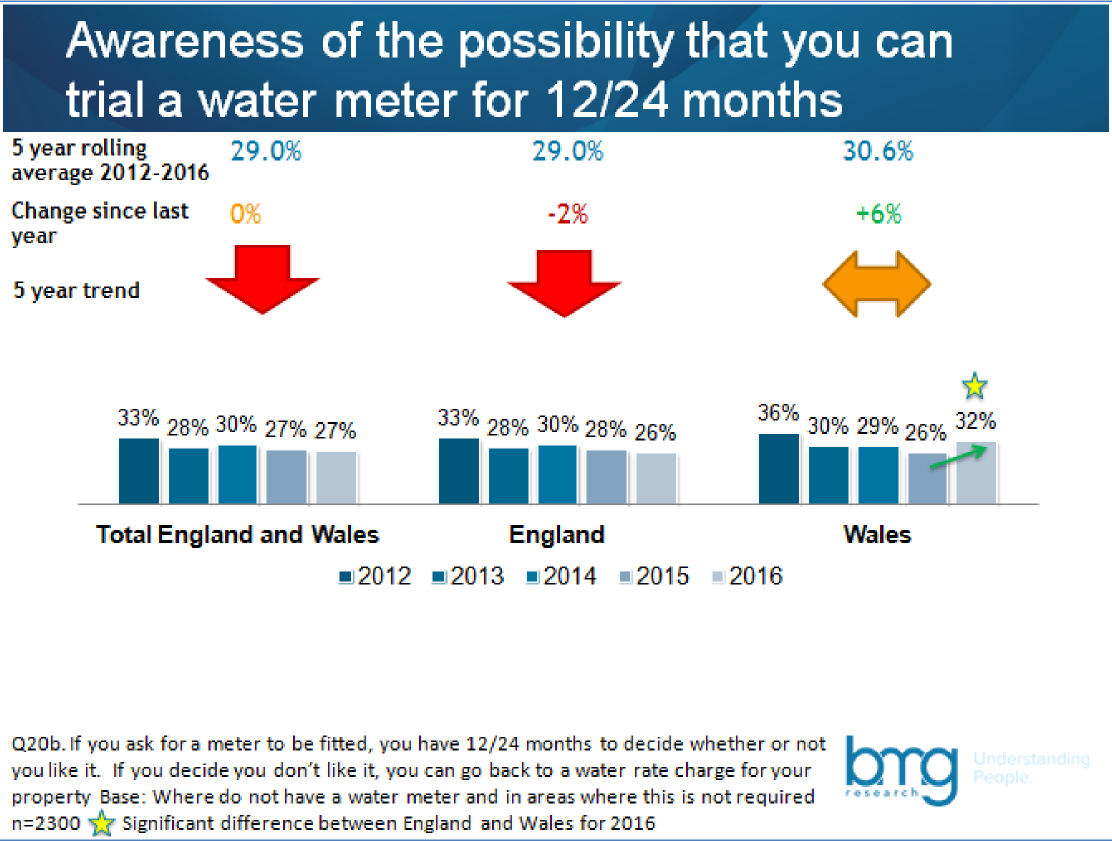
Respondents from unmetered households are also asked if they are aware that they could trial a water meter for a period of time (between 12 and 24 months depending on the water company).

Awareness of this is much lower than awareness that meter fitting is free; with fewer than three in ten (27%) aware of the trial period. Overall, there is no change in awareness since 2015 but between nations we see a 2% decline for England and a 6% increase for Wales.

Awareness has fallen significantly over the last 5 years in England and Wales (from 33% in 2012 to 27% in 2016), and in England (from 33% in 2012 to 26% in 2016). The overall 5 year trend is downward; awareness levels appear to be decreasing.

Customers in Wales are significantly more likely than those in England to be aware of the trial period (32% vs. 26%).

Figure 51: Awareness of the possibility to trial a water meter



Those significantly *less* likely to be aware of the possibility of trialling a water meter are:

- Younger customers (17% of 18-29's and 20% of 30-44's vs. 25% of 45-59's, 37% of 60-74's and 31% of 75+);
- Those with children in the household (17% vs. 30% of those without children in the household);

- Those in receipt of benefits (21% vs. 28% of those who do not receive benefits).

5.4.5 Awareness of the possibility to trial a water meter – WaSCs[18]

The 2016 WaSC average is 27%. Anglian Water customers are most likely to be aware of the trial period (43%) and Severn Trent customers least, with awareness levels at 18%.

The 5 year rolling average of two water companies is significantly higher than the total WaSC 5 year rolling average of 29.2%; South West Water (47.4%) and Anglian Water (41.8%). Severn Trent Water has the lowest 5 year rolling average (24.6%).

The overall 5 year trend for all WaSCs is downward. Severn Trent, South West Water and Yorkshire Water display significant downward 5 year trends.

The level of awareness is significantly different from 2015 where change is indicated in green or red in the Figure below.

Figure 52: Awareness of the possibility to trial a water meter – WaSCs

Aware of trial period for water meter fitted at customers request	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	29.0%	33%	28%	30%	27%	27%	↓	n/a	0%
Total WaSCs (2016 sample: 3305)	29.2%	33%	28%	30%	28%	27%	↓	n/a	-1%
Anglian Water (2016 sample: 400)	41.8%	44%	45%	46%	31%	43%	↔	↑	12%
Dŵr Cymru Welsh Water (2016 sample: 400)	31.0%	37%	29%	30%	26%	33%	↔	↔	7%
Northumbrian Water (2016 sample: 200)	28.4%	30%	31%	23%	24%	34%	↔	↔	10%
Severn Trent Water (2016 sample: 400)	24.6%	30%	26%	26%	23%	18%	↓	↔	-5%
South West Water (2016 sample: 204)	47.4%	57%	52%	42%	48%	38%	↓	↑	-10%
Thames Water (2016 sample: 200)	25.2%	28%	20%	25%	28%	25%	↔	↔	-3%
United Utilities (2016 sample: 400)	32.2%	35%	31%	36%	32%	27%	↔	↔	-5%
Wessex Water (2016 sample: 501)	32.4%	41%	32%	32%	25%	32%	↔	↔	7%
Yorkshire Water (2016 sample: 400)	27.8%	31%	28%	29%	27%	24%	↓	↔	-3%

[18] Customers of Southern Water and some of Thames Water are excluded from this question because of the company's compulsory metering scheme

5.4.6 Awareness of the possibility to trial a water meter – WoCs[19]

Across the WoCs, average awareness that a water meter can be trialled is 27% for 2016. Highest awareness can be found amongst customers of Portsmouth Water and Cambridge Water (33% each). Bristol Water and Dee Valley Water display the lowest levels of awareness (19% each).

The general 5 year trend for WoCs is significantly downward. Over five years, the awareness levels of Bristol Water's customers have fallen significantly whilst awareness of Cambridge Water customers has increased significantly.

The level of awareness is significantly different from 2015 where change is indicated in green or red in the Figure below.

Figure 53: Awareness of the possibility to trial a water meter – WoCs

Aware of trial period for water meter fitted at customers request	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	29.0%	33%	28%	30%	27%	27%	↓	n/a	0%
Total WoCs (2016 sample: 2115)	29.6%	35%	29%	31%	26%	27%	↓	n/a	1%
Affinity Water Central (2016 sample: 150)	29.4%	32%	28%	39%	21%	27%	↔	↔	6%
Affinity Water East (2016 sample: 150)	33.0%	26%	39%	44%	27%	29%	↔	↔	2%
Bournemouth Water (2016 sample: 150)	31.4%	32%	38%	26%	29%	32%	↔	↔	3%
Bristol Water (2016 sample: 152)	31.6%	42%	36%	32%	29%	19%	↓	↔	-10%
Cambridge Water (2016 sample: 154)	29.0%	21%	29%	33%	29%	33%	↑	↔	4%
Dee Valley Water (2016 sample: 150)	27.2%	30%	34%	23%	30%	19%	↔	↔	-11%
Essex & Suffolk Water (2016 sample: 151)	29.8%	33%	32%	30%	23%	31%	↔	↔	8%
Hartlepool Water (2016 sample: 151)	25.0%	23%	25%	31%	20%	26%	↔	↔	6%
Portsmouth Water (2016 sample: 150)	29.4%	33%	27%	18%	36%	33%	↔	↔	-3%
South Staffs Water (2016 sample: 151)	30.8%	38%	35%	27%	32%	22%	↔	↔	-10%
Sutton & East Surrey Water (2016 sample: 151)	29.4%	39%	19%	36%	21%	32%	↔	↔	11%

[19] All customers of Affinity Water South East Water and South East as well as some of Affinity Water Central and Affinity Water East are excluded from this question because of the companies' compulsory metering schemes

6 Contacting Water Companies

This section covers customer contact with their water/sewerage company. Questions range from the likelihood of making contact where worried about a bill, to satisfaction with any contact made in the 12 months prior to the survey, identifying the reason for contact and satisfaction with elements of the contact, through to a new addition to the Water Matters survey, overall satisfaction with customer services in general.

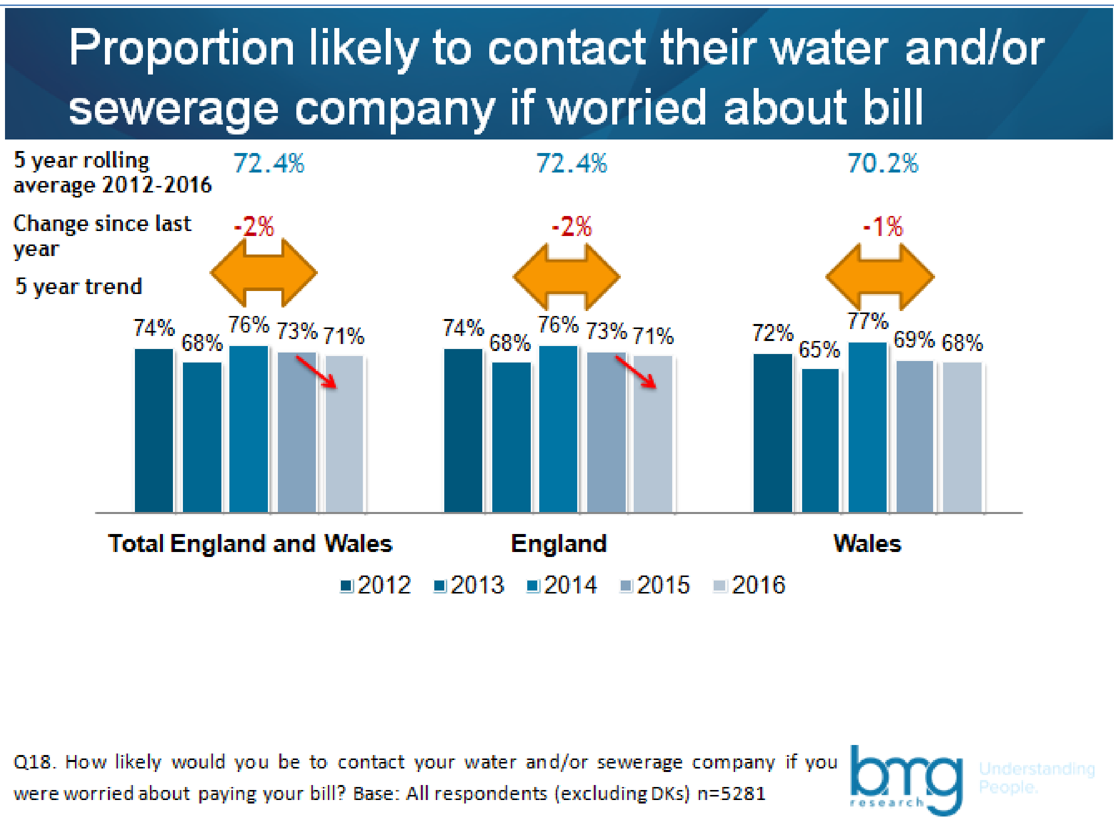
6.1 Likelihood of contacting water/sewerage company if worried about a bill

Respondents are asked how likely they would be to contact their water company if they were worried about paying a bill.

Seven in ten (71%) are likely to get in touch with their water company if they are worried about paying a bill; a significant 2% fall on 2015. Customers in England are marginally more likely than those in Wales to get in touch (71% vs. 68%).

The overall 5 year trend for likelihood to contact is stable as can be seen below.

Figure 54: Likelihood of contacting water/sewerage company if worried about a bill



There is little significant difference between different demographic groups regarding the likelihood to contact if worried about paying a bill. The only significant difference found is that those who are not retired are significantly more likely than those who are retired to contact their water/sewerage company if worried about paying a bill (74% vs. 66%).

However, customers who disagree that their bills are affordable are significantly *less* likely to contact their water/sewerage company if worried about paying a bill (61% vs. 76% who agree their bills are affordable). This suggests that customers who are struggling to pay can become harder to reach than other customers and may find it harder to benefit from the additional advice and in some cases financial support that is available to them from their water company.

The “Dissatisfied” and “Unfair” clusters are least likely to contact their water/sewerage company if worried about paying their bill (61% and 66% respectively compared to 70% of the “Neutral” cluster and 74% of the “Very satisfied” cluster).

6.1.1 Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

Seven in ten (71%) of all WaSC customers say they are likely to contact their water company if worried about paying a bill. Customers of Northumbrian Water are most likely to say they would make contact (75%) whilst customers of Southern Water are least likely (65%).

None of the WaSCs are significantly different to the overall 5 year rolling WaSC average of 72.0%.

As evident in the Figure below, likelihood to contact has fallen significantly amongst customers of South West Water and Wessex Water over the last five years. None of the WaSCs have experienced a significant increase in awareness over the last five years.

Likelihood to contact is significantly different from 2015 for Southern and Wessex Water.

Figure 55: Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

Likely to contact company if worried about paying a bill	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	72.4%	74%	68%	76%	73%	71%	↔	n/a	-2%
Total WaSCs (2016 sample: 3305)	72.0%	74%	67%	76%	72%	71%	↔	n/a	-1%
Anglian Water (2016 sample: 400)	74.0%	73%	68%	78%	77%	74%	↔	↔	-3%
Dŵr Cymru Welsh Water (2016 sample: 400)	69.6%	72%	64%	77%	68%	67%	↔	↔	-1%
Northumbrian Water (2016 sample: 200)	71.0%	69%	67%	77%	67%	75%	↔	↔	8%
Severn Trent Water (2016 sample: 400)	74.2%	77%	70%	78%	75%	71%	↔	↔	-4%
South West Water (2016 sample: 204)	74.6%	81%	74%	75%	74%	69%	↓	↔	-5%
Southern Water (2016 sample: 200)	74.8%	78%	73%	81%	77%	65%	↔	↔	-12%
Thames Water (2016 sample: 200)	69.8%	75%	62%	72%	68%	72%	↔	↔	4%
United Utilities (2016 sample: 400)	71.4%	73%	67%	76%	72%	69%	↔	↔	-3%
Wessex Water (2016 sample: 501)	75.6%	82%	72%	77%	76%	71%	↓	↔	-5%
Yorkshire Water (2016 sample: 400)	71.8%	69%	69%	77%	73%	71%	↔	↔	-2%

6.1.2 Likelihood of contacting water company if worried about a bill – WoCs

The overall likelihood of contact amongst WoCs is 72% for 2016. Customers of Affinity Water East are most likely to contact their water company if worried about paying a bill (80%) whilst Sutton and East Surrey are least likely (64%).

None of the WoCs are significantly different to the overall 5 year rolling WoC average of 73.4%.

Amongst the WoCs there are no significant trends either of decline or improvement over the last five years.

For Affinity Water East, likelihood to contact has improved significantly from 69% in 2015 to 80% as shown in the following Figure.

Figure 56: Likelihood of contacting water company if worried about a bill – WoCs

Likely to contact company if worried about paying a bill	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	72.4%	74%	68%	76%	73%	71%	↔	n/a	-2%
Total WoCs (2016 sample: 2115)	73.4%	74%	70%	76%	73%	72%	↔	n/a	-1%
Affinity Water Central (2016 sample: 150)	70.4%	70%	68%	76%	69%	68%	↔	↔	0%
Affinity Water East (2016 sample: 150)	72.4%	70%	72%	71%	69%	80%	↔	↔	11%
Affinity Water South East (2016 sample: 151)	75.0%	84%	69%	74%	77%	71%	↔	↔	-6%
Bournemouth Water (2016 sample: 150)	73.0%	75%	67%	71%	79%	73%	↔	↔	-6%
Bristol Water (2016 sample: 152)	72.4%	77%	68%	74%	76%	67%	↔	↔	-9%
Cambridge Water (2016 sample: 154)	72.0%	73%	67%	79%	73%	68%	↔	↔	-5%
Dee Valley Water (2016 sample: 150)	73.8%	71%	73%	74%	73%	78%	↔	↔	5%
Essex & Suffolk Water (2016 sample: 151)	72.6%	71%	69%	74%	76%	73%	↔	↔	-3%
Hartlepool Water (2016 sample: 151)	75.8%	73%	79%	77%	77%	73%	↔	↔	-4%
Portsmouth Water (2016 sample: 150)	73.6%	73%	66%	83%	73%	73%	↔	↔	0%
South East Water (2016 sample: 304)	74.4%	79%	71%	76%	74%	72%	↔	↔	-2%
South Staffs Water (2016 sample: 151)	78.2%	76%	80%	82%	80%	73%	↔	↔	-7%
Sutton & East Surrey Water (2016 sample: 151)	67.4%	71%	68%	70%	64%	64%	↔	↔	0%

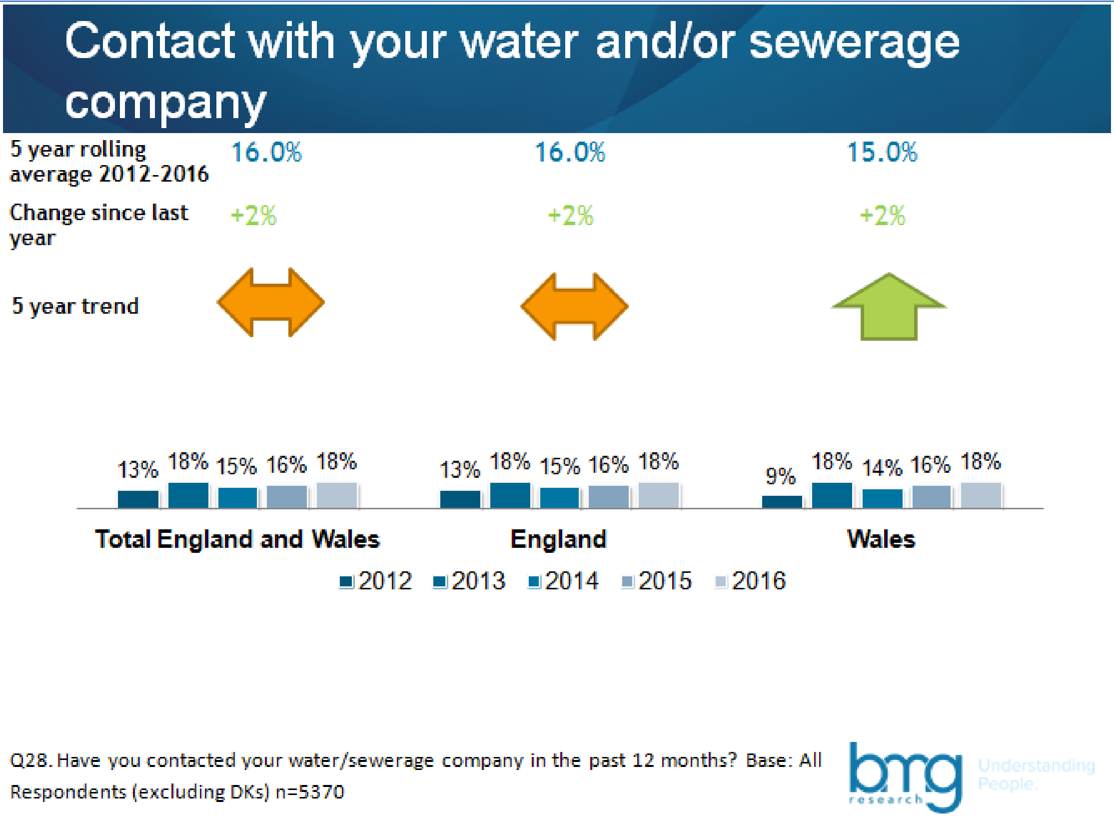
6.2 Contact with the water/sewerage company

Respondents are asked whether or not they had contacted their water/sewerage company in the last 12 months.

Although fewer than two in ten (18%) have made contact with their water/sewerage company in the last 12 months, this is still a significant 2% increase on 2015. The proportion contacting their water/sewerage company is the same in England and in Wales (18%).

The overall 5 year trend for customers contacting their water/sewerage company is stable. However it is significantly increasing for customers in Wales.

Figure 57: Contact with the water/sewerage company



The following groups of customers are significantly more likely to have contacted their water/sewerage company in the last 12 months:

- Those who are not retired (21% vs. 14% of retired customers);
- Metered households (20% vs. 16% of unmetered households);
- Those with children in the household (23% vs. 17% of those without children in the household);
- Those in receipt of benefits (23% vs. 17% of those not receiving benefits);
- Those who are dissatisfied with their water supply services (33% vs. 18% of those who are satisfied;

- Those who are dissatisfied with their sewerage services (39% vs. 17% of those who are satisfied;
- Those who disagree that their bill is clear how much needs to be paid (35% vs. 18% who agree their bill is clear);
- Those who disagree that it is clear how the final amount is reached (28% vs. 18% who agree).

The “Dissatisfied” cluster is significantly more likely to have contacted their water/sewerage company in the last 12 months (26% vs. 21% of the “Unfair” cluster, 18% of the “Neutral” cluster and 16% of the “Very satisfied” cluster).

6.2.1 Contact with the water/sewerage company – WaSCs

On average 18% of WaSC customers contacted their provider in 2016. Customers of Southern Water are most likely to have contacted their company (26%) whereas customers of Northumbrian Water and United Utilities are least likely (16% each).

None of the WaSCs are significantly different to the overall 5 year rolling WaSC average of 16%.

As shown in the Figure below, at the collective level there is a significant upward 5 year trend regarding contact with WaSCs. At individual WaSC level, this significant upward trend is seen for Welsh Water and South West Water.

Figure 58: Contact with the water/sewerage company - WaSCs

Contact with Water/ Sewerage Company in last 12 months	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	16.0%	13%	18%	15%	16%	18%	↔	n/a	2%
Total WaSCs (2016 sample: 3305)	16.0%	13%	17%	15%	17%	18%	↑	n/a	1%
Anglian Water (2016 sample: 400)	19.6%	17%	23%	17%	22%	19%	↔	↔	-3%
Dŵr Cymru Welsh Water (2016 sample: 400)	14.6%	9%	17%	14%	15%	18%	↑	↔	3%
Northumbrian Water (2016 sample: 200)	13.6%	12%	17%	9%	14%	16%	↔	↔	2%
Severn Trent Water (2016 sample: 400)	14.2%	13%	14%	13%	14%	17%	↔	↔	3%
South West Water (2016 sample: 204)	21.0%	16%	24%	20%	22%	23%	↑	↔	1%
Southern Water (2016 sample: 200)	19.2%	11%	19%	14%	26%	26%	↔	↔	0%
Thames Water (2016 sample: 200)	15.4%	9%	17%	17%	14%	20%	↔	↔	6%
United Utilities (2016 sample: 400)	15.0%	15%	13%	14%	17%	16%	↔	↔	-1%
Wessex Water (2016 sample: 501)	17.0%	15%	21%	16%	16%	17%	↔	↔	1%
Yorkshire Water (2016 sample: 400)	17.4%	18%	17%	15%	18%	19%	↔	↔	1%

6.2.2 Contact with the water company – WoCs

On average 19% of WoC customers contacted their provider in 2016. In the 12 months prior to the survey, customers of Hartlepool Water are most likely to have contacted their water company (25%) whereas customers of Bournemouth Water are least likely (15% each).

None of the WoCs are significantly different to the overall 5 year rolling WoC average of 16.2%.

At individual WoC level, Portsmouth Water is the only water company to display a significant upward trend over the last 5 years.

Contact with the water company is significantly different from 2015 where change is highlighted in green in the Figure below.

Figure 59: Contact with the water company – WoCs

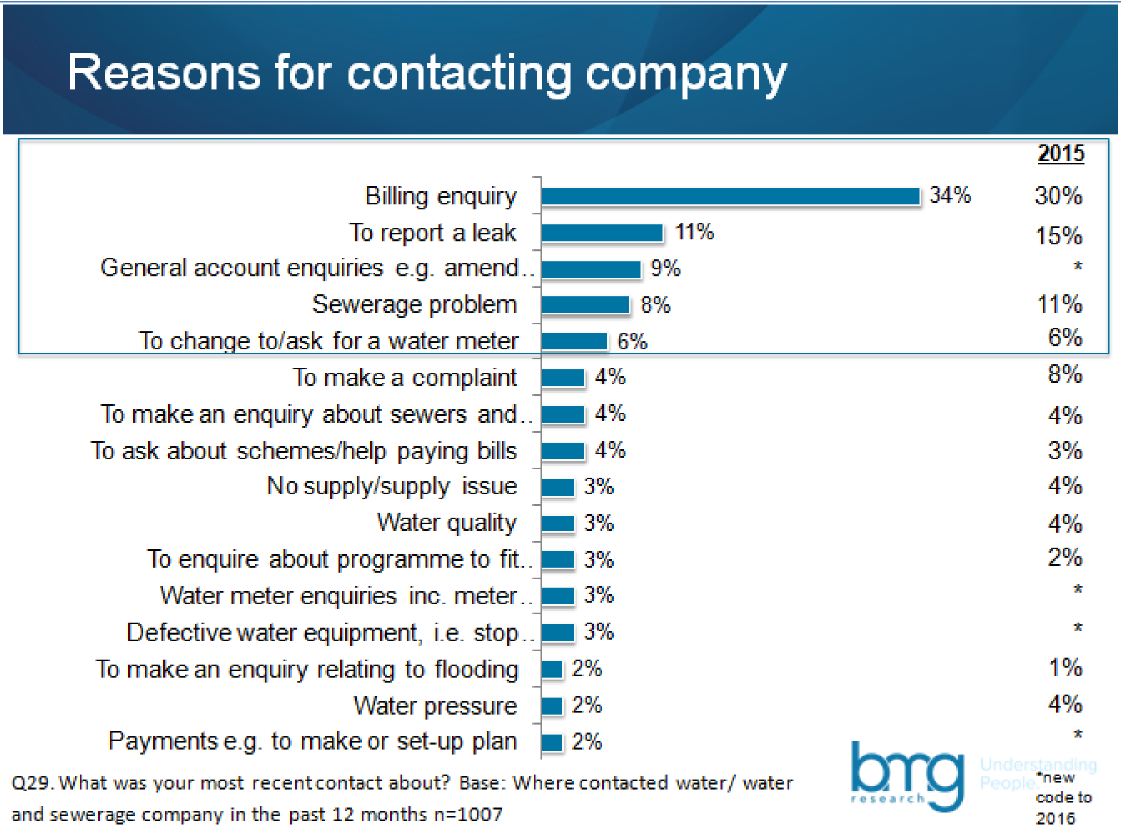
Contact with Water/ Sewerage Company in last 12 months	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	16.0%	13%	18%	15%	16%	18%	↔	n/a	2%
Total WoCs (2016 sample: 2115)	16.2%	13%	19%	15%	15%	19%	↔	n/a	4%
Affinity Water Central (2016 sample: 150)	16.6%	17%	20%	15%	13%	18%	↔	↔	5%
Affinity Water East (2016 sample: 150)	16.6%	18%	19%	11%	16%	19%	↔	↔	3%
Affinity Water South East (2016 sample: 151)	19.2%	13%	25%	19%	21%	18%	↔	↔	-3%
Bournemouth Water (2016 sample: 150)	14.6%	11%	16%	15%	16%	15%	↔	↔	-1%
Bristol Water (2016 sample: 152)	15.0%	9%	19%	13%	17%	17%	↔	↔	0%
Cambridge Water (2016 sample: 154)	16.4%	13%	21%	19%	10%	19%	↔	↔	9%
Dee Valley Water (2016 sample: 150)	18.8%	11%	25%	12%	22%	24%	↔	↔	2%
Essex & Suffolk Water (2016 sample: 151)	15.8%	13%	18%	17%	15%	16%	↔	↔	1%
Hartlepool Water (2016 sample: 151)	16.6%	12%	22%	13%	11%	25%	↔	↔	14%
Portsmouth Water (2016 sample: 150)	16.0%	5%	19%	17%	18%	21%	↑	↔	3%
South East Water (2016 sample: 304)	18.4%	13%	24%	15%	16%	24%	↔	↔	8%
South Staffs Water (2016 sample: 151)	13.6%	13%	14%	10%	14%	17%	↔	↔	3%
Sutton & East Surrey Water (2016 sample: 151)	14.0%	10%	16%	13%	12%	19%	↔	↔	7%

6.3 Reason for contact

Those who had contacted their water/sewerage company in the last 12 months are asked what their reason for contact was.

The main reason is billing related (34%, up from 30% in 2015), this is followed by the reporting of a leak (11% down from 15% in 2015).

Figure 60: Reason for contact



Younger respondents are significantly more likely to have contacted about a billing enquiry compared to the industry average (57% of those aged 18-29 year and 40% of those aged 30-44).

Metered households are significantly more likely than unmetered households to have contacted with a billing enquiry (37% vs. 28%) as are those who disagree that it is clear how the final amount of their bill was reached (46% vs. 31% who agree their bill clear).

Retired respondents are significantly more likely to contact with a complaint compared to those who are not retired (6% vs. 3%).

Households without children are significantly more likely than those with children to contact their water company with an enquiry about a water meter fitting (4% vs. 1%).

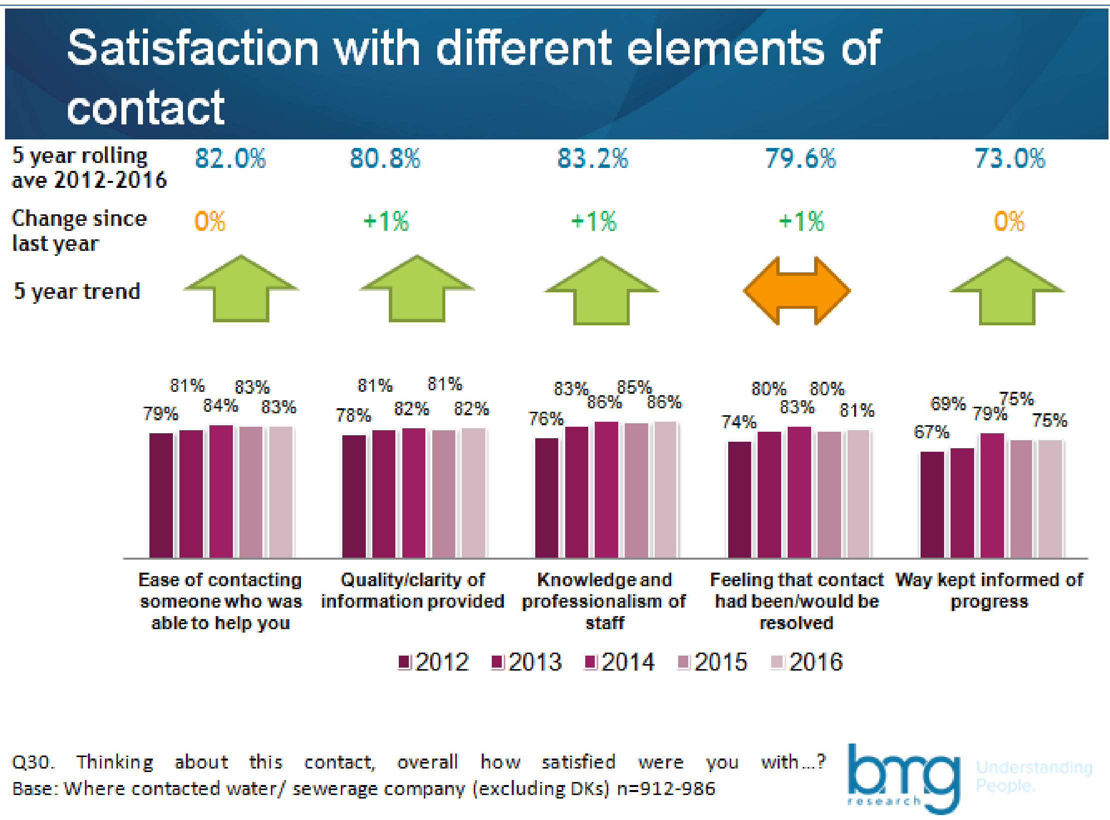
Bill clarity is a driver for contact with billing enquiries - customers who disagree that their bill is clear are significantly more likely to have contacted their water/sewerage company regarding a billing enquiry (59% vs. 31% who agree their bill is clear).

6.4 Satisfaction with different aspects of contact

Respondents who made contact in the last 12 months were asked to rate their satisfaction with different aspects of contact handling.

Satisfaction across the different aspects is high, with more than seven in ten expressing satisfaction. Levels of satisfaction are consistent with 2015 for all elements. The overall 5 year trend for satisfaction with each aspect is positive and significantly so for all with the exception of 'feeling that contact had been/ would be resolved', which has a stable 5 year trend.

Figure 61: Satisfaction with different aspects of contact



As evident in the Figure below, customers in Wales tend to be slightly more satisfied than those in England with each aspect of contact; however, none of these differences are significant.

Figure 62: Satisfaction with each aspect of contact by nation

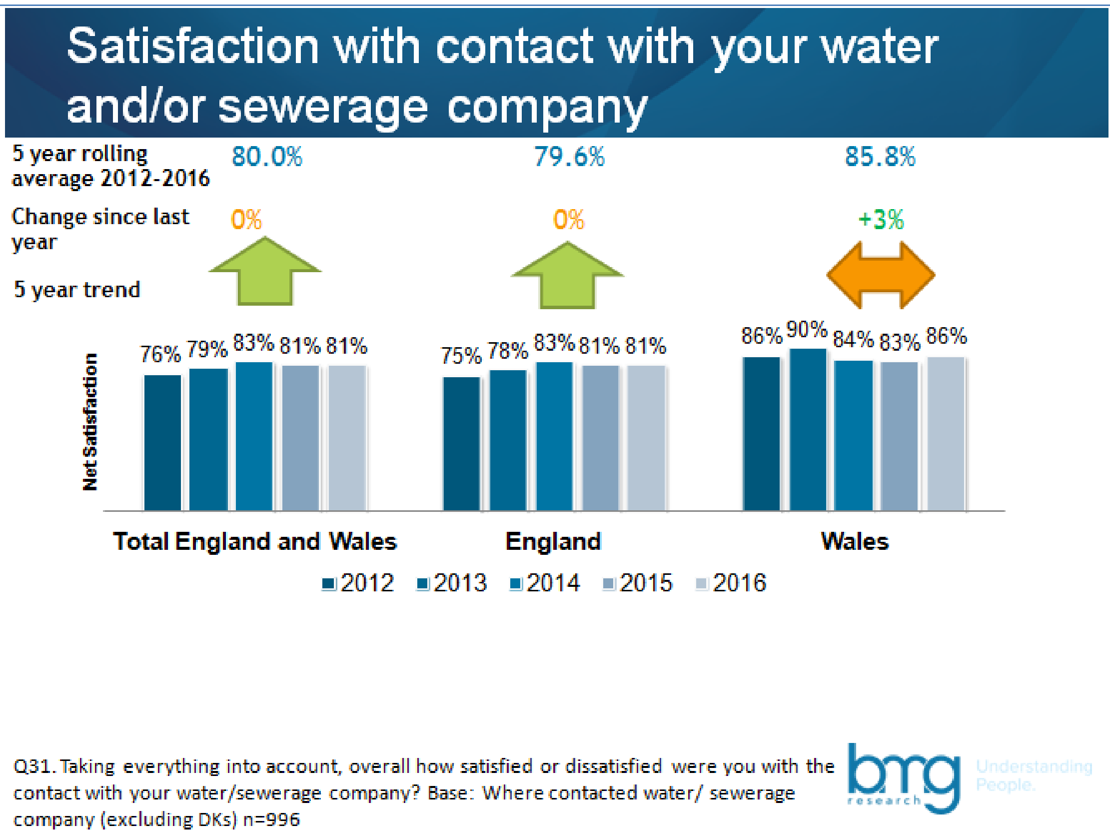
	Total Base: 912-986	England Base: 819-883	Wales Base: 93-103
The ease of contacting someone who was able to help you	83%	83%	85%
The quality/clarity of information provided	82%	82%	86%
The knowledge and professionalism of staff	86%	86%	87%
The feeling that your contact had been, or would be resolved	81%	80%	85%
The way that the water company has kept you informed of progress with your enquiry/complaint/claim	75%	75%	79%

6.5 Overall satisfaction with contact

Taking all aspects of contact into account, satisfaction with contact remains high, with eight in ten (81%) satisfied overall. Consistent with a higher satisfaction rating for the different elements of contact, customers in Wales are more likely than customers in England to be satisfied with contact (86% vs. 81%), albeit not significantly so.

Across the industry there is a significant upward 5 year trend for satisfaction with contact, driven by the significant upward 5 year trend for England.

Figure 63: Satisfaction with contact



The following groups of customers are significantly more likely to be satisfied with contact:

- Those without a disability in the household (83% vs. 77% of those with a disability in the household);
- Those living in an urban location (86% vs. 80% in a rural location and 75% in a suburban location).

Unsurprisingly, it is the "Dissatisfied" cluster that is *less* likely to be satisfied with contact (49% vs. 68% of the "Unfair" cluster, 82% of the "Neutral" cluster and 93% of the "Very satisfied" cluster.

The following are significantly *less* likely to be satisfied with their contact experience:

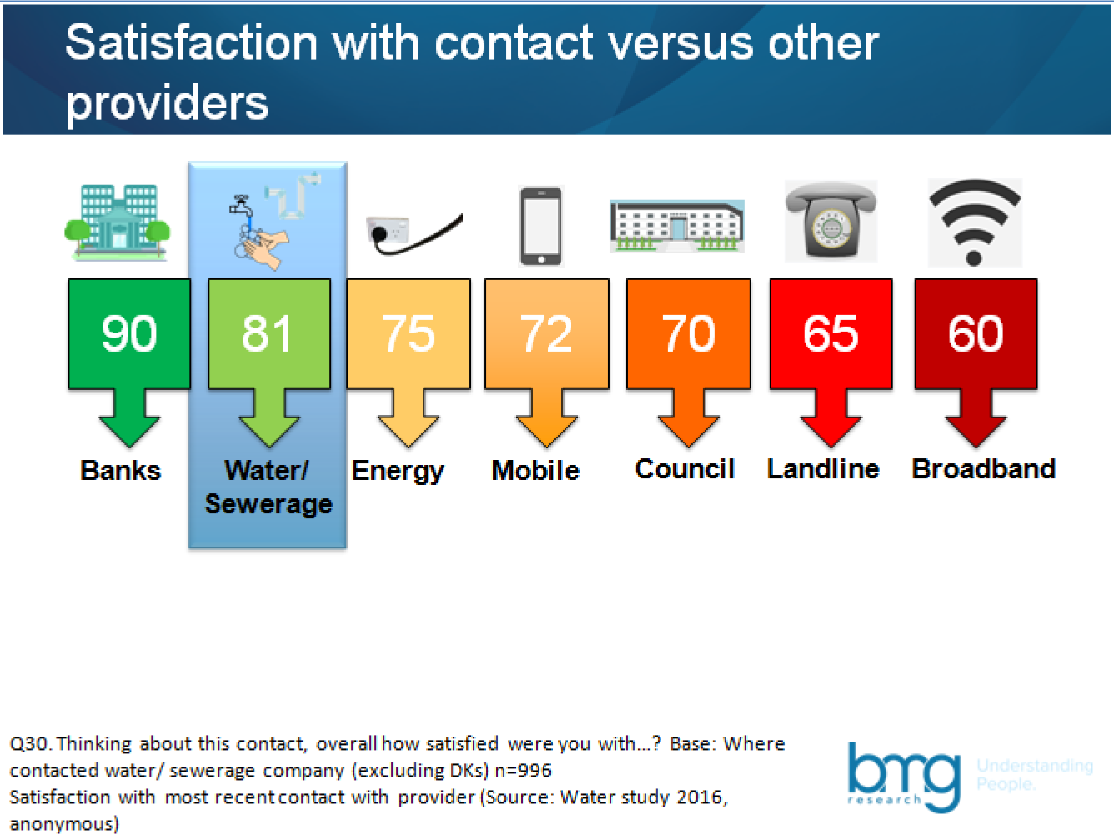
- Dissatisfied with the value for money of their water services (55% vs. 92% who are satisfied) or sewerage services (47% vs. 92% who are satisfied);

- Disagree that their water/sewerage company cares about the service it (34% vs. 91% who agree their water/sewerage company cares about service provision).

6.5.1 Satisfaction with contact versus other providers

The following chart takes data from a survey conducted by BMG Research for a client in the water industry. This shows that the contact handling of water/sewerage companies compares well with a range of utilities and services. As can be seen in the Figure below, satisfaction with contact with water/sewerage companies is ranked high compared to other service providers; second only to banks.

Figure 64: Satisfaction with contact versus other providers

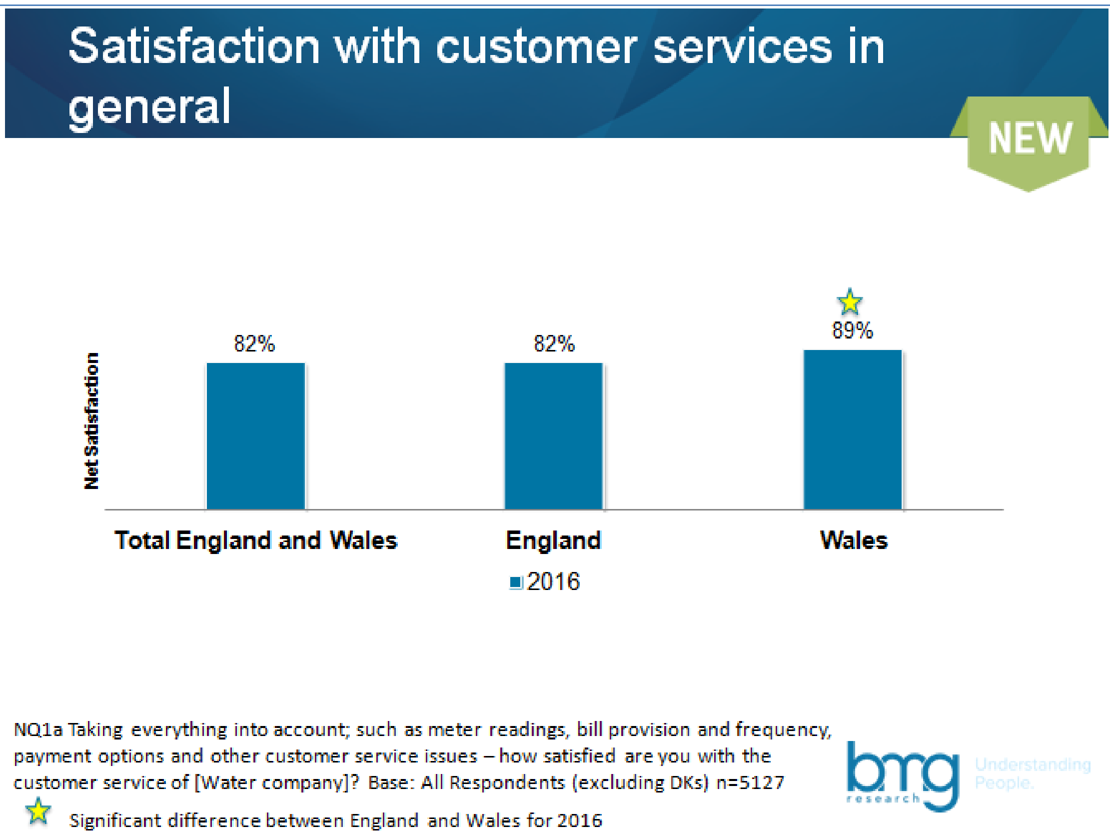


6.6 Satisfaction with overall customer service

This question is new to Water Matters, and is aimed at understanding customers' *overall* satisfaction with the customer services of their water company. It asks respondents to consider customer services in the round including meter readings, bill provision and frequency, payment options and any other aspect of customer service before rating their satisfaction level with their water/sewerage company.

Overall, eight in ten (82%) customers are satisfied with the customer service of their water company. Customers in Wales are significantly more likely than those in England to be satisfied (89% vs. 82%).

Figure 65: Satisfaction with overall customer service



The following groups of customers are significantly more likely to be satisfied with the customer service of their water/sewerage company:

- Retired customers (88% vs. 78% of those who are not retired);
- Metered households (84% vs. 80% of unmetered households);
- Those without children in the household (84% vs. 77% of those with children in the household).

It is interesting to understand which customers are significantly *less* likely to be satisfied with customer services in order to focus efforts on improving this. They are:

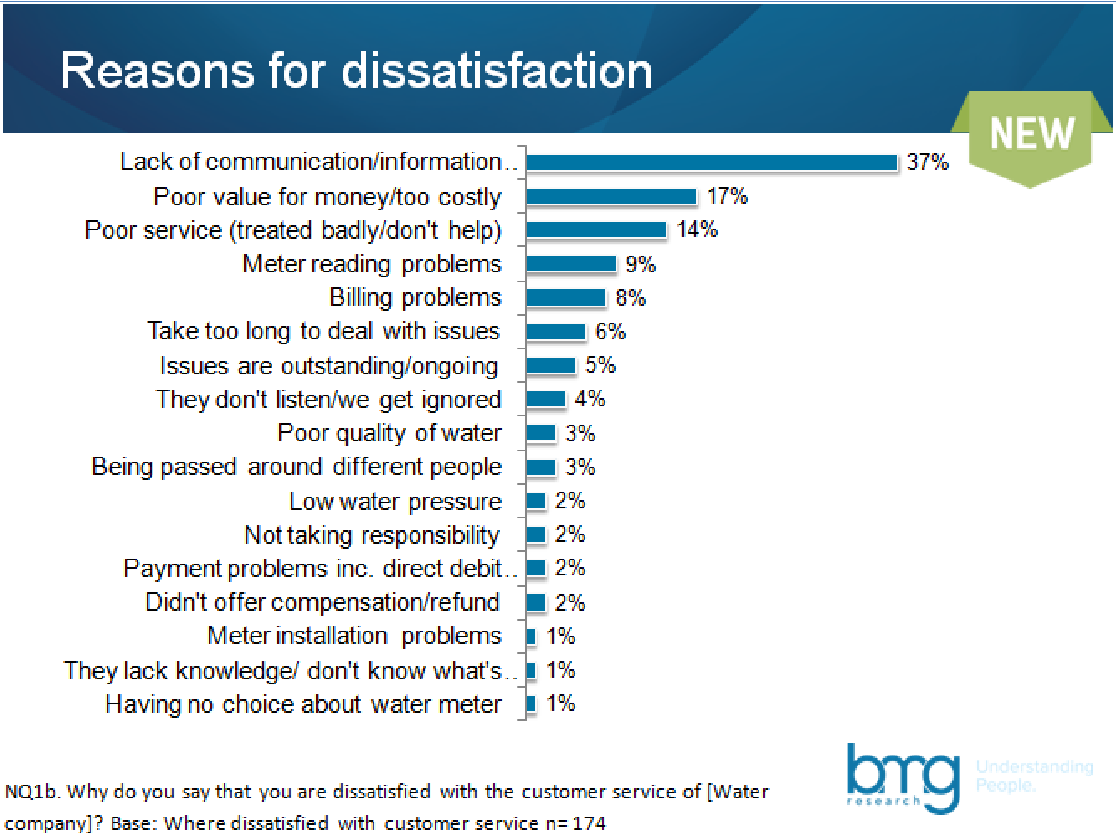
- Dissatisfied with the contact they have had with their company. (33% vs. 96% of those who are satisfied);

- Those who disagree that it is clear how much needs to be paid and when are (60% vs. 86% of those who agree);
- Those who disagree that it is clear how the final amount of their bill was reached (60% vs. 87% of those who agree);
- Those who disagree that their charges are fair (58% vs. to 93% of those who agree);
- Metered households where the meter was fitted as part of a compulsory scheme (74% vs. 85% of those where a meter was already fitted and 89% of those who requested a meter fitting).

6.6.1 Reasons for dissatisfaction with customer services

Those who are dissatisfied with the customer services of their water/sewerage company are asked their reason for their dissatisfaction. The Figure below shows that the primary reason for dissatisfaction with customer services is the lack of communication / information provided (37%). Further reasons include poor value for money (17%) and poor service (14%).

Figure 66: Reasons for dissatisfaction with customer services



Unmetered households are significantly more likely than metered households to state lack of communication as their reason for dissatisfaction (51% vs. 27% of metered households). Those dissatisfied with their sewerage services are significantly more likely to state poor value for money as a reason for their dissatisfaction with customer services (30% vs. 14% of those who are satisfied).

7 Water on tap

This section covers customer satisfaction with various aspects of the water supply service such as reliability, colour and appearance, safety, pressure, taste and smell as well as hardness/ softness of the water.

New to Water Matters 2016, this section also covers customers' confidence in the long-term supply of water, that is, without being subjected to restrictions such as hose-pipe bans.

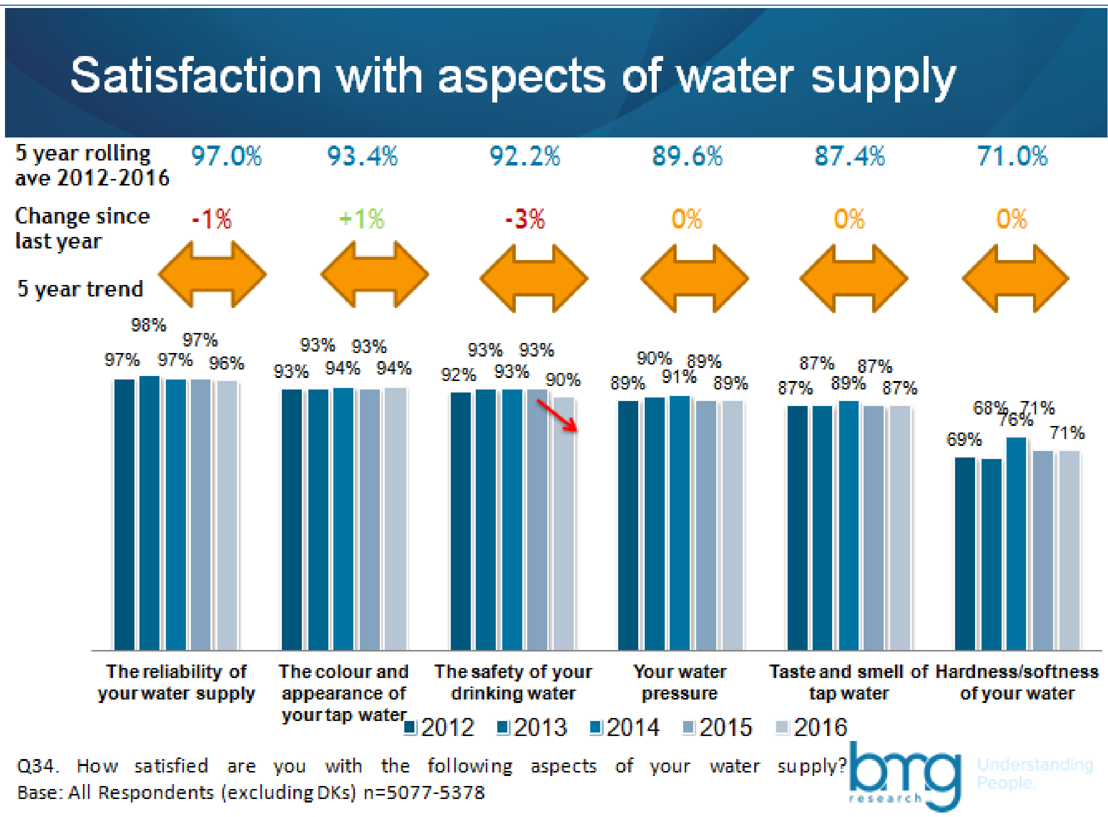
7.1 Satisfaction with aspects of water supply

Satisfaction with all aspects of water supply remains very high; reliability of supply (96%), the colour and appearance of tap water (94%), safety of the drinking water (90%), water pressure (89%), taste and smell (87%) and hardness/ softness of water (71%).

Satisfaction levels are largely in line with 2015. The only significant difference noted since last year is the level of satisfaction with the safety of drinking water; down 3% since 2015.

The general trend for level of satisfaction with each aspect is stable for all aspects of water supply.

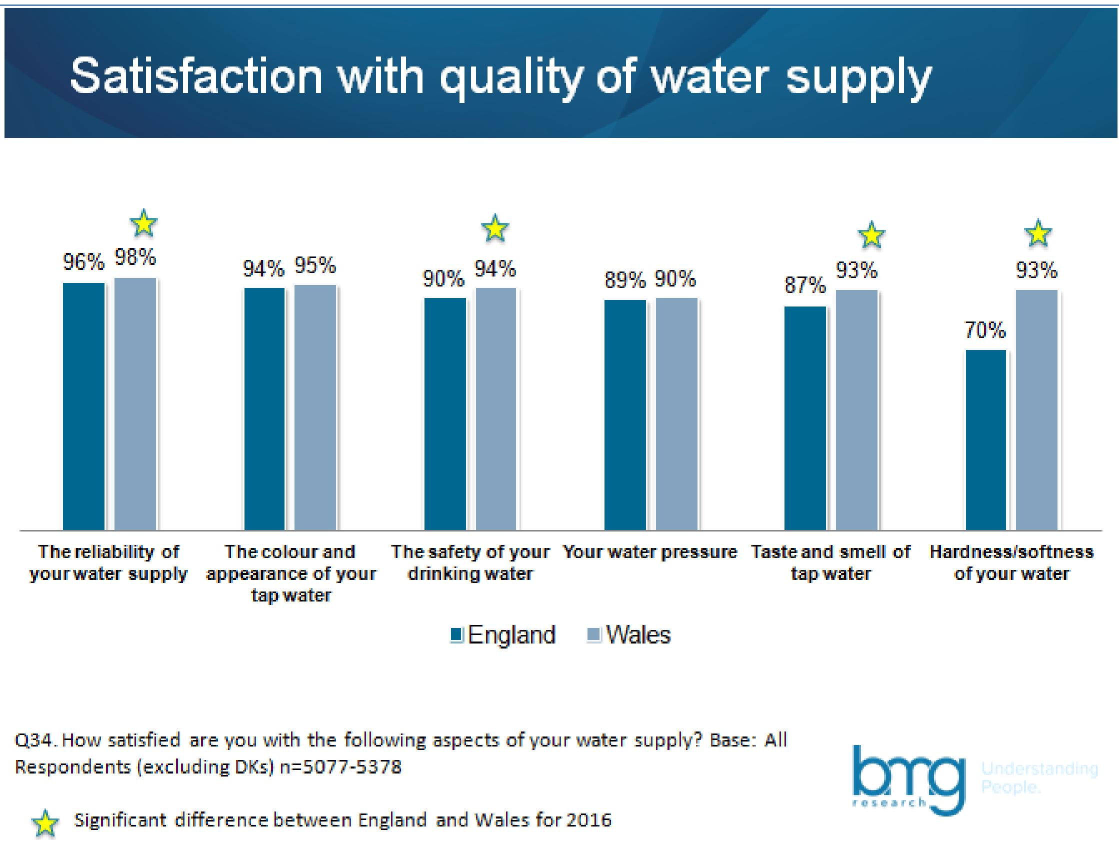
Figure 67: Satisfaction with aspects of water supply



Customers in Wales are more likely than those in England to be satisfied with all aspects of water supply, significantly so for four out of the six. The biggest difference in satisfaction between customers in England and Wales is for the hardness/ softness of the water where there is a 23% difference.

These differences between England and Wales are similar to 2015. However, it should be noted that in 2015, customers in Wales were significantly more satisfied with water pressure than customers in England. This year, Wales has seen a 3% decline in satisfaction with water pressure and England a 1% increase, bringing satisfaction levels in line with each other. This is also the case regarding the colour and appearance of tap water; Wales sees a 3% fall whilst England experiences just a 1% point fall; the difference between the nations in 2015 was significant but this is not the case for 2016.

Figure 68: Satisfaction with aspects of water supply by nation



7.1.1 Satisfaction with aspects of water supply – WaSCs

The Figure overleaf shows the level of satisfaction with each aspect of water supply by WaSC. It also shows the industry average and WaSC average. Best performers for each element are highlighted in green text whilst the worst performers are highlighted in red.

As shown in the Figure overleaf, Northumbrian Water is rated highest for five of the six aspects of water supply and fourth with respect to their weakest area; hardness/ softness of water. Thames Water has the lowest satisfaction rating for four of the five aspects of water supply and for the two where they are not bottom, they are amongst the lowest. Despite this, for five of the six aspects more than four in five customers express satisfaction whilst just over half (55%) are satisfied with the hardness/ softness of water in their area.

There is just one significant change since 2015; the total WaSC average satisfaction level with safety of drinking water has fallen by 3% to 90%.

There is a significant upward 5 year trend for the following:

- Taste and smell of tap water for Welsh Water;
- Water pressure for Northumbrian Water;
- Colour and appearance of tap water for Severn Trent;
- Hardness/ softness of Water for Yorkshire Water.

There is a significant downward 5 year trend for the following aspects:

- Safety of drinking water for Thames Water and United Utilities;
- Taste and smell of tap water for United Utilities;
- Hardness/ softness of Water for United Utilities.

Figure 69: Satisfaction with aspects of water supply – WaSCs[20]

	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 (2016 sample: 5420)	96%	94%	90%	89%	87%	71%
Total WaSCs (2016 sample: 3305)	96%	94%	90%	89%	87%	75%
Anglian Water (2016 sample: 400)	95%	92%	88%	87%	84%	53%
Dŵr Cymru Welsh Water (2016 sample: 400)	98%	95%	94%	90%	93%	94%
Northumbrian Water (2016 sample: 200)	98%	97%	95%	93%	94%	88%
Severn Trent Water (2016 sample: 400)	97%	95%	90%	91%	85%	79%
South West Water (2016 sample: 204)	98%	97%	94%	93%	88%	91%
Southern Water (2016 sample: 200)	97%	92%	87%	87%	85%	60%
Thames Water (2016 sample: 200)	94%	91%	85%	87%	85%	55%
United Utilities (2016 sample: 400)	97%	96%	92%	90%	89%	90%
Wessex Water (2016 sample: 501)	97%	94%	91%	90%	87%	60%
Yorkshire Water (2016 sample: 400)	95%	93%	92%	89%	88%	85%

7.1.2 Satisfaction with aspects of water supply- WoCs

The Figure overleaf shows the level of satisfaction with each element of water supply by WoC. It also shows the industry average and WoC average.

Unlike the findings between WaSCs, there is no single WoC with the highest satisfaction levels for the majority of elements of water supply.

Sutton and East Surrey Water have the highest satisfaction for both colour and appearance of the water (97%) and its taste and smell (94%). Affinity Water Central has the lowest satisfaction for two of the six elements of water service; taste and smell (80%) and the hardness/ softness of the water (45%).

There is one significant change since 2015; the total WoC average satisfaction level with safety of drinking water has fallen by 3% to 89%.

There is a significant upward 5 year trend for the following:

- Reliability of supply for Affinity Water East, Bournemouth Water and Portsmouth Water.

There is a significant downward 5 year trend for:

- Hardness/ softness of water for Portsmouth Water and South East Water;
- Colour and appearance of tap water, taste and smell for South East Water.

[20] Best performers for each aspect are highlighted in green text whilst the worst performers are highlighted in red.

Figure 70: Satisfaction with aspects of water supply – WoCs[21]

	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 (2016 sample: 5420)	96%	94%	90%	89%	87%	71%
Total WoCs (2016 sample: 2115)	97%	93%	89%	87%	86%	58%
Affinity Water Central (2016 sample: 150)	96%	91%	87%	85%	**80%**	**45%**
Affinity Water East (2016 sample: 150)	98%	93%	88%	**81%**	93%	52%
Affinity Water South East (2016 sample: 151)	97%	96%	92%	89%	89%	53%
Bournemouth Water (2016 sample: 150)	99%	95%	93%	**90%**	92%	57%
Bristol Water (2016 sample: 152)	95%	91%	**86%**	88%	85%	63%
Cambridge Water (2016 sample: 154)	95%	94%	93%	89%	87%	52%
Dee Valley Water (2016 sample: 150)	97%	**89%**	93%	88%	87%	**87%**
Essex & Suffolk Water (2016 sample: 151)	97%	96%	87%	89%	90%	54%
Hartlepool Water (2016 sample: 151)	97%	95%	**95%**	89%	89%	69%
Portsmouth Water (2016 sample: 150)	**100%**	95%	92%	89%	85%	55%
South East Water (2016 sample: 304)	97%	90%	87%	85%	82%	57%
South Staffs Water (2016 sample: 151)	**94%**	92%	92%	89%	83%	75%
Sutton & East Surrey Water (2016 sample: 151)	96%	**97%**	93%	87%	**94%**	68%

[21] Best performers for each aspect are highlighted in green text whilst the worst performers are highlighted in red.

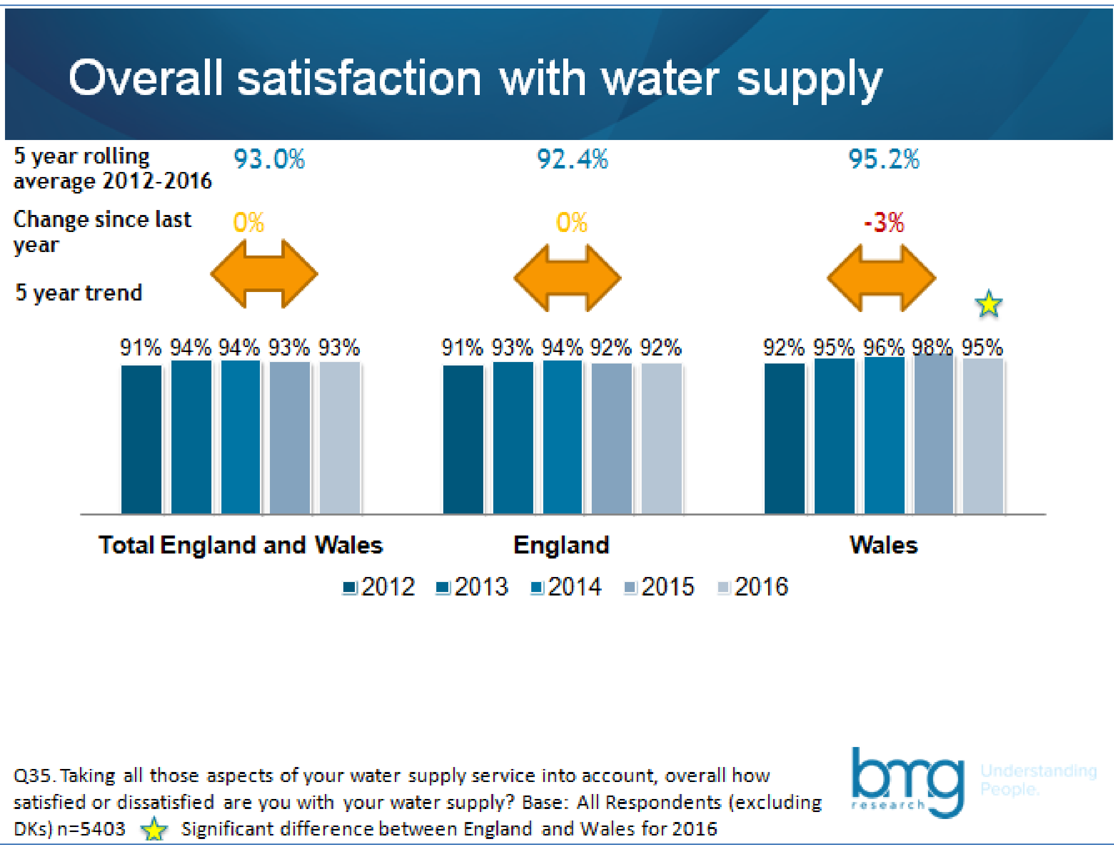
7.2 Overall satisfaction with water supply

After rating satisfaction with different aspects of the water service, customers are asked for their overall level of satisfaction with their water supply.

As evident in the Figure below, overall satisfaction with water supply is very high with more than nine in ten (93%) satisfied. Customers in Wales are significantly more likely than those in England to be satisfied with their water supply (95% vs. 92%) despite a 3% fall since 2015, with satisfaction remaining stable for England.

The overall 5 year trend remains stable.

Figure 71: Overall satisfaction with water supply



The following groups of customers are significantly more satisfied with their water supply:

- Retired customers (96% vs. 91% of those who are not retired);
- Those without a disability in the household (94% vs. 91% of those with a disability in the household);
- Those without children in the household (94% vs. 90% of those with children in the household);
- Those not in receipt of benefits (94% vs. 91% of those who do receive benefits);
- Owner occupiers (94% vs. 91% of private renters and Council/ Housing Association tenants).

The “Very satisfied” cluster is significantly more likely to be satisfied with their water supply (99% vs. 89% of the “Neutral” cluster, 87% of the “Unfair” cluster and 69% of the “Dissatisfied” cluster).

There is an association between perceptions of bill clarity and satisfaction with water supply. Those who disagree that their bill is clear are significantly *less* likely to be satisfied with their water supply (73% vs. 95% of those who agree) as are those who disagree that it is clear how the final amount was reached (80% vs. 95% of those who agree).

Unsurprisingly, there is a link between satisfaction with value for money of water services and the overall satisfaction with the supply; just 68% of those dissatisfied with value for money are satisfied with their water supply compared to 98% who are satisfied with value for money.

7.2.1 Overall satisfaction with water supply – WaSCs

The average for overall satisfaction with water supply for WaSCs in 2016 is 93%. Northumbrian Water has the highest satisfaction (97%) whereas Thames Water reports the lowest (88%).

None of the WaSCs are significantly different to the overall 5 year rolling WaSC average of 92.8%.

As shown below, Severn Trent and South West Water are the only WaSCs where overall satisfaction with water supply has significantly improved over the last 5 years. No other company level trends are significant.

Figure 72: Overall satisfaction with water supply – WaSCs

Overall satisfaction with water supply	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	93.0%	91%	94%	94%	93%	93%	↔	n/a	0%
Total WaSCs (2016 sample: 3305)	92.8%	91%	94%	94%	92%	93%	↔	n/a	1%
Anglian Water (2016 sample: 400)	92.0%	92%	92%	93%	91%	92%	↔	↔	1%
Dŵr Cymru Welsh Water (2016 sample: 400)	95.6%	92%	96%	95%	99%	96%	↔	↔	-3%
Northumbrian Water (2016 sample: 200)	95.2%	94%	96%	95%	94%	97%	↔	↔	3%
Severn Trent Water (2016 sample: 400)	93.4%	90%	94%	94%	94%	95%	↑	↔	1%
South West Water (2016 sample: 204)	91.4%	86%	92%	93%	93%	93%	↑	↔	0%
Southern Water (2016 sample: 200)	89.6%	87%	91%	92%	87%	91%	↔	↔	4%
Thames Water (2016 sample: 200)	90.8%	92%	92%	93%	89%	88%	↔	↔	-1%
United Utilities (2016 sample: 400)	93.8%	93%	95%	94%	92%	95%	↔	↔	3%
Wessex Water (2016 sample: 501)	93.0%	93%	93%	95%	93%	91%	↔	↔	-2%
Yorkshire Water (2016 sample: 400)	93.6%	89%	95%	96%	95%	93%	↔	↔	-2%

7.2.2 Overall satisfaction with water supply – WoCs

The average for overall satisfaction with water supply for WoCs in 2016 is 91%. Cambridge Water has the highest level of satisfaction (98%). South East Water reports the lowest level of satisfaction for 2016 (87%).

None of the WoCs are significantly different to the overall 5 year rolling WoC average of 92.0%.

As shown in the Figure below, Bournemouth Water is the only WoC with a significantly positive 5 year trend. No other company level trends are significant.

Figure 73: Overall satisfaction with water supply – WoCs

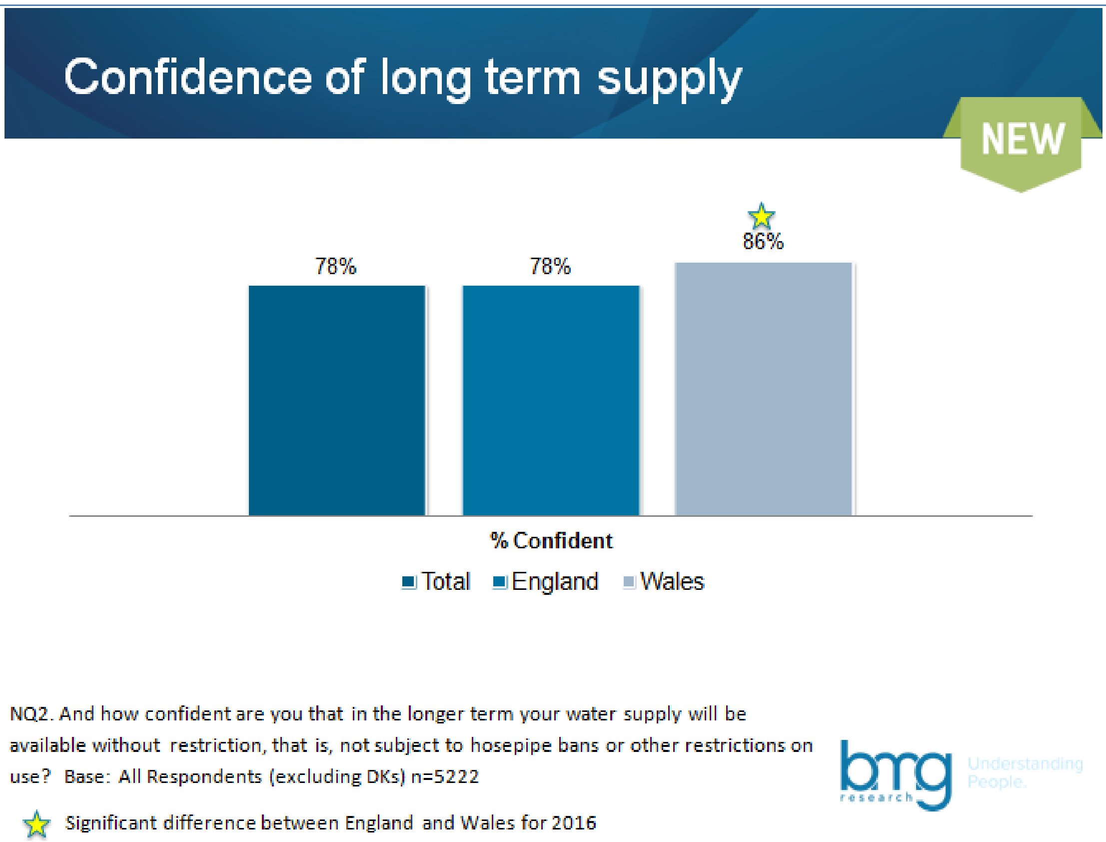
Overall satisfaction with water supply	5 year rolling average	Five year company trend 2012	2013	2014	2015	2016	Overall 5 year trend	Company Average vs WOC average	Change since last year
Industry (2016 sample: 5420)	93.0%	91%	94%	94%	93%	93%	↔	n/a	0%
Total WoCs (2016 sample: 2115)	92.0%	89%	93%	93%	93%	91%	↔	n/a	-2%
Affinity Water Central (2016 sample: 150)	91.2%	88%	91%	95%	93%	89%	↔	↔	-4%
Affinity Water East (2016 sample: 150)	90.6%	84%	89%	97%	92%	91%	↔	↔	-1%
Affinity Water South East (2016 sample: 151)	90.0%	91%	89%	91%	88%	91%	↔	↔	3%
Bournemouth Water (2016 sample: 150)	93.2%	87%	95%	94%	95%	95%	↑	↔	0%
Bristol Water (2016 sample: 152)	92.6%	90%	95%	94%	95%	89%	↔	↔	-6%
Cambridge Water (2016 sample: 154)	94.6%	92%	96%	94%	93%	98%	↔	↔	5%
Dee Valley Water (2016 sample: 150)	94.2%	93%	91%	99%	91%	97%	↔	↔	6%
Essex & Suffolk Water (2016 sample: 151)	92.4%	91%	95%	91%	92%	93%	↔	↔	1%
Hartlepool Water (2016 sample: 151)	94.8%	91%	95%	98%	96%	94%	↔	↔	-2%
Portsmouth Water (2016 sample: 150)	92.4%	87%	93%	94%	95%	93%	↔	↔	-2%
South East Water (2016 sample: 304)	89.4%	88%	91%	91%	90%	87%	↔	↔	-3%
South Staffs Water (2016 sample: 151)	93.6%	88%	96%	93%	98%	93%	↔	↔	-5%
Sutton & East Surrey Water (2016 sample: 151)	93.6%	90%	94%	96%	94%	94%	↔	↔	0%

7.3 Confidence in the long-term supply of water

A new question to Water Matters for 2016 seeks to understand how confident customers are that in the longer term, their water supply will be available without restriction i.e. not subject to hosepipe bans or other restrictions on use.

More than seven in ten (78%) are confident that their water supply will be available without restriction on use in the longer term. Customers in Wales are significantly more likely than those in England to be confident of this (86% vs. 78%).

Figure 74: Confidence in the long-term supply of water



The following groups are significantly more likely to be confident in the longer term supply of their water:

- Those who are retired (83% vs. 76% of those who are not retired);
- Those without a disability in the household (79% vs. 76% of those with a disability in the household);
- Those without children in the household (80% vs. 73% of those with children in the household);
- Those living in an urban or rural location (79% each vs. 76% of those living in a suburban location.

The “Very satisfied” cluster is significantly more likely than any other cluster to be confident in the longer term supply of their water (87% vs. 69% of the “Neutral” cluster, 66% of the “Unfair” cluster and 59% of the “Dissatisfied” cluster.

Just 35% of those dissatisfied with their water supply are likely to be confident of the longer term supply of their water compared to 81% of those who are satisfied with their water supply.

Customers of WaSCs are significantly more likely than customers of WoCs to be confident in the longer term supply of their water (80% vs. 73%).

7.3.1 Confidence in the long-term supply of water – WaSCs

The average level of confidence in the longer term supply of water for WaSCs is 80%. Thames Water is the only WaSC where customers are significantly less likely than the average to be confident in their longer term supply. Customers of Welsh Water, Northumbrian Water, Severn Trent and Yorkshire Water are significantly more likely to be confident in the longer term supply of their water.

Figure 75: Confidence in the long-term supply of water – WaSCs

	% Confident[22]
Industry (5420)	78%
Total WaSC (3305)	80%
Anglian Water (400)	74%
Dwr Cymru (Welsh Water) (400)	**86%**
Northumbrian Water (200)	**85%**
Severn Trent Water (400)	**83%**
South West Water (204)	83%
Southern Water (200)	74%
Thames Water (200)	**73%**
United Utilities Water (400)	81%
Wessex Water (501)	79%
Yorkshire Water (400)	**83%**

[22] Significant difference from WaSC average denoted by green or red text

7.3.2 Confidence in the long-term supply of water – WoCs

The average level of confidence in the longer term supply of water for WoCs is 73%. Confidence amongst customers of Bournemouth Water and Hartlepool Water is significantly higher than the WoC average. Confidence is significantly lower amongst customers of Affinity Water Central, Bristol Water and Sutton and East Surrey Water; as shown in the Figure below.

Figure 76: Confidence in the long-term supply of water – WoCs

	% Confident[23]
Industry (5420)	78%
Total WoC (2115)	73%
Affinity Water Central (150)	**67%**
Affinity Water East (150)	74%
Affinity Water South East (151)	**69%**
Bournemouth Water (150)	**89%**
Bristol Water (152)	**70%**
Cambridge Water (154)	79%
Dee Valley Water (150)	**81%**
Essex & Suffolk Water (151)	76%
Hartlepool Water (151)	**88%**
Portsmouth Water (150)	76%
South East Water (304)	**69%**
South Staffs Water (151)	79%
Sutton & East Surrey Water (151)	**66%**

[23] Significant difference from WoC average denoted by green or red text

8 A Sewerage system that works

This section presents customer satisfaction with different aspects of their sewerage supply service and includes satisfaction with reducing smells from sewerage treatment works, maintenance of sewerage pipes and treatment works, cleaning waste water properly before releasing it back into the environment and minimising sewer flooding.

Customers of WoCs get their sewerage services from a WaSC. However, four in ten (40%) are unaware that sewerage services are provided by a different company to the one that provides their water services, with customers in Wales[24] significantly more likely to be unaware than those in England (70% vs. 39%).

8.1 Satisfaction with aspects of sewerage service

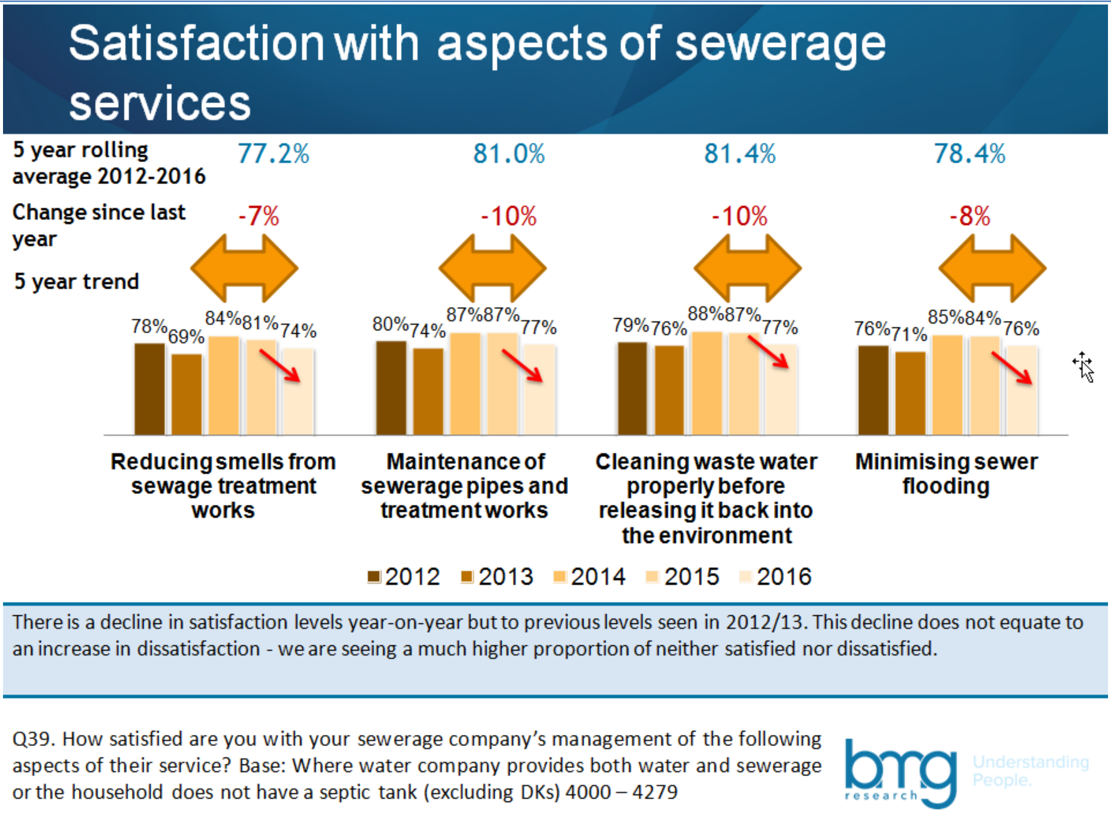
Satisfaction with all aspects of sewerage service has fallen significantly since 2015. However, the 5 year trend for satisfaction with all aspects remains stable.

The fall in satisfaction since 2015 is driven by an increase in ambivalence rather than an increase in dissatisfaction. Water Matters 2015 reported a much higher proportion of 'don't know' responses for these questions which were, in line with all previous Water Matters surveys, excluded from the analysis. In 2016 there were fewer 'don't know' responses to exclude and more neutral responses which were included; this has created a step change in the findings. The higher levels of satisfaction witnessed in 2015 and 2014 could potentially be explained by the bigger proportions of don't know responses which were excluded from the analysis in those years.

Satisfaction levels are increasing for all aspects of the sewerage service over time but this is unlikely to reach the levels seen with aspects of the water service as much larger proportions of respondents typically respond 'don't know' or give neutral answers to questions about sewerage services than water services. This seems to reflect lower engagement/awareness with sewerage services, which are less visible to customers than water services where a product is delivered into their homes and experienced directly.

[24] Based on the sewerage customers of Dee Valley only

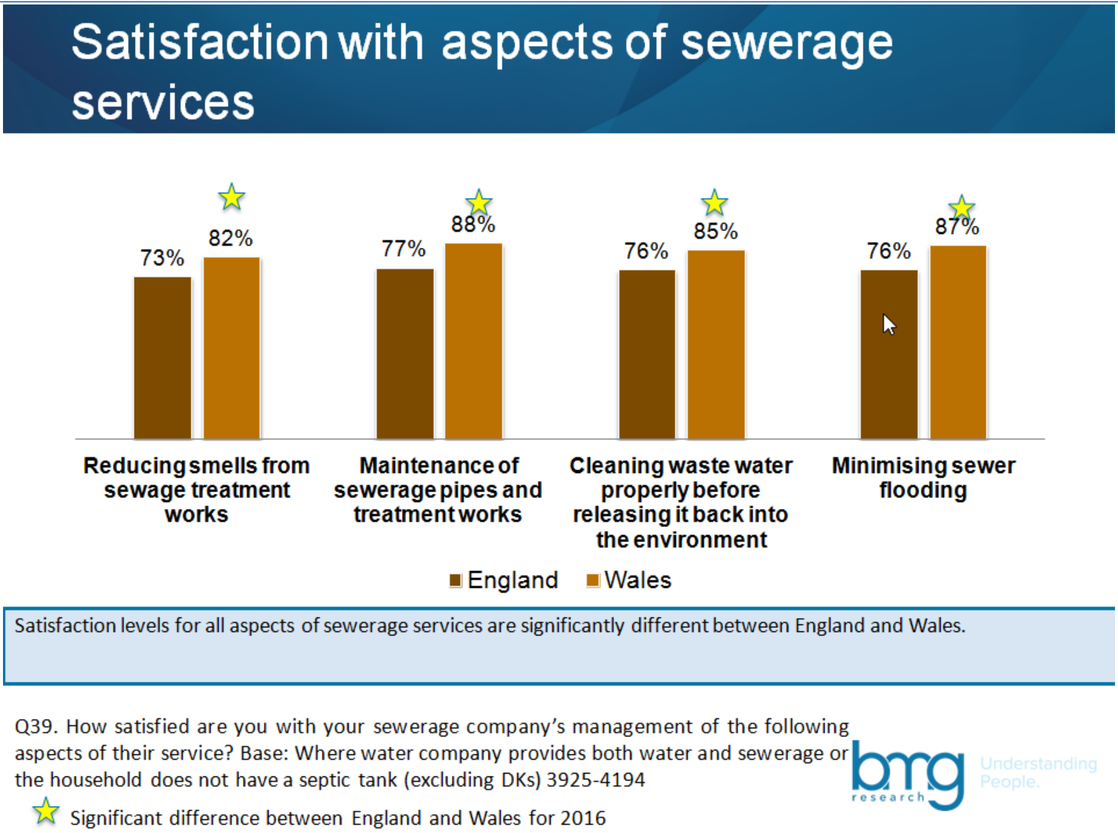
Figure 77: Satisfaction with aspects of sewerage service



8.1.1 Satisfaction with aspects of sewerage service by nation

As shown in the Figure below, customers in Wales are significantly more likely than those in England to be satisfied with all aspects of their sewerage service. This is most evident for satisfaction with maintenance of sewerage pipes and treatment works and minimising sewer flooding with an 11% difference.

Figure 78: Satisfaction with aspects of sewerage service by nation



8.1.2 Satisfaction with aspects of sewerage service – WaSCs

The Figure below shows satisfaction levels with the different aspects of sewerage service by WaSC.

Satisfaction levels have fallen significantly since 2015 for many WaSCs but as previously discussed, this is not because dissatisfaction has increased, it is due to an increase in the proportion of customers stating they are neither satisfied nor dissatisfied. Welsh Water has the highest satisfaction for all aspects of sewerage services. Northumbrian Water has joint highest satisfaction with Welsh Water for reducing smells from sewage treatment works (82%) and cleaning waste water properly before releasing it back into the environment (86%). Thames Water has the lowest satisfaction levels of all WaSCs, for all aspects.

There is a significant upward 5 year trend for company actions to minimise sewer flooding for Welsh Water.

There are no significant downward 5 year trends.

Figure 79: Satisfaction with aspects of sewerage service – WaSCs[25]

	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 (2016 sample: 5420)	74%	77%	77%	76%
Total WaSCs (2016 sample: 3305)	74%	79%	78%	77%
Anglian Water (2016 sample: 400)	73%	79%	75%	78%
Dŵr Cymru Welsh Water (2016 sample: 400)	**82%**	**89%**	**86%**	**87%**
Northumbrian Water (2016 sample: 200)	**82%**	88%	**86%**	87%
Severn Trent Water (2016 sample: 400)	75%	79%	79%	77%
South West Water (2016 sample: 204)	73%	73%	74%	75%
Southern Water (2016 sample: 200)	75%	81%	78%	76%
Thames Water (2016 sample: 200)	**68%**	**67%**	**70%**	**70%**
United Utilities (2016 sample: 400)	74%	80%	80%	76%
Wessex Water (2016 sample: 501)	78%	83%	80%	81%
Yorkshire Water (2016 sample: 400)	75%	81%	79%	79%

25 Best performers for each aspect are highlighted in green text whilst the worst performers are highlighted in red.

8.1.3 Satisfaction with aspects of sewerage service – customers of WoCs

The Figure overleaf shows satisfaction with different aspects of sewerage service by WoC. 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.

Satisfaction has fallen significantly on 2015 for the customers of many WoCs, and this is again associated with an increase in those stating they are neither satisfied nor dissatisfied.

The customers of Hartlepool Water and Dee Valley Water have the highest satisfaction with the maintenance of sewerage pipes and treatment works (85% each). Hartlepool Water customers are also the most satisfied with the cleaning of waste water before it is released back into the environment (84%). South Staffs Water customers are the most highly satisfied with the management of smells from sewage treatment works (85%) and customers of Bournemouth Water have the highest satisfaction level for the minimisation of sewer flooding (86%).

Essex and Suffolk Water customers are the least satisfied with the maintenance of sewage pipes from treatment works (67%) and minimising sewer flooding (67%). The customers of Sutton and East Surrey Water are least satisfied with reductions in smells from sewage treatment works (60%) and customers of South East Water least satisfied with the cleaning waste water before it is released back into the environment (66%).

There is a significant upward 5 year trend for the following:

- Company actions to minimise sewer flooding for the customers of Bournemouth Water and South Staffs Water;
- Company actions to minimise sewer flooding for the customers of South Staffs Water.

There are no significant downward 5 year trends to report.

Figure 80: Satisfaction with aspects of sewerage service – customers of WoCs[26]

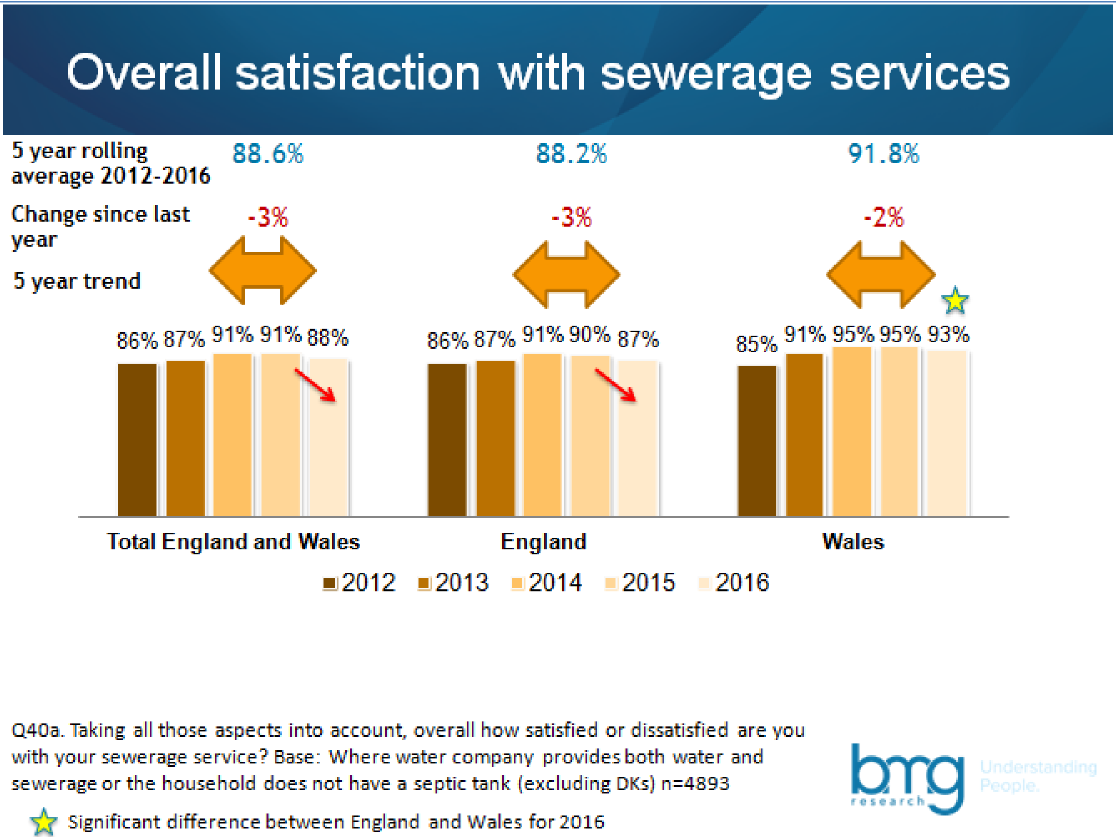
	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning waste water properly before releasing it back into the environment	Minimising sewer flooding
Industry (2016 sample: 5420)	74%	77%	77%	76%
Total WoCs (2016 sample: 2115)	72%	74%	72%	74%
Affinity Water Central (2016 sample: 150)	72%	72%	72%	70%
Affinity Water East (2016 sample: 150)	75%	72%	72%	77%
Affinity Water South East (2016 sample: 151)	72%	75%	72%	75%
Bournemouth Water (2016 sample: 150)	79%	81%	74%	**86%**
Bristol Water (2016 sample: 152)	70%	75%	71%	78%
Cambridge Water (2016 sample: 154)	74%	71%	74%	76%
Dee Valley Water (2016 sample: 150)	78%	**85%**	83%	80%
Essex & Suffolk Water (2016 sample: 151)	65%	**67%**	69%	**67%**
Hartlepool Water (2016 sample: 151)	85%	**85%**	**84%**	85%
Portsmouth Water (2016 sample: 150)	79%	77%	75%	78%
South East Water (2016 sample: 304)	69%	68%	**66%**	68%
South Staffs Water (2016 sample: 151)	**85%**	84%	81%	84%
Sutton & East Surrey Water (2016 sample: 151)	**60%**	73%	69%	70%

[26] Best performers for each aspect are highlighted in green text whilst the worst performers are highlighted in red.

8.2 Overall satisfaction with sewerage services

Overall satisfaction with sewerage services has fallen significantly from 91% in 2015 to 88% in 2016. Customers in Wales are significantly more likely to be satisfied than those in England with sewerage services (93% vs. 87%). The general 5 year trend for overall satisfaction with sewerage services remains stable.

Figure 81: Overall satisfaction with sewerage services



The following groups of customers are significantly more likely to be satisfied with their sewerage services:

- Retired customers (91% vs. 86% of those who are not retired);
- Those without children in the household (89% vs. 85% of those with children in the household).

The “Very satisfied” cluster is significantly more likely than any other to be satisfied with their sewerage service (96% vs. 80% of the “Neutral” cluster, 78% of the “Unfair” cluster and 68% of the “Dissatisfied” cluster.

Further analysis found that those who are dissatisfied with the customer services of their water/sewerage company are significantly *less* likely to be satisfied with their sewerage service (56% vs. 93% of those who are satisfied). The same is true of those who disagree it is clear how the final amount of their bill was reached (73% vs. 92% who agree).

Unsurprisingly, just 61% of those who are dissatisfied with value for money of sewerage services are satisfied with sewerage services overall compared to 95% of those satisfied with value for money.

And just six in ten (60%) of those who disagree that the company cares about the service it provides are satisfied with their sewerage services compared to 95% who agree that their water/sewerage company cares.

8.2.1 Overall satisfaction with sewerage services – WaSCs

The average satisfaction with sewerage services amongst WaSCs is 88% for 2016. Welsh Water has the highest satisfaction with sewerage services (93%) whereas South West Water has the lowest level of satisfaction (81%).

As evident in the Figure below, the 5 year rolling average for South West Water is the only average to be significantly different from the total WaSC 5 year rolling average (83.8% vs. 89.0%).

The general trend for satisfaction with sewerage services is stable. Satisfaction levels for Yorkshire Water have increased significantly over the last 5 years. There are no other significant company level trends.

Figure 82: Overall satisfaction with sewerage services – WaSCs

Overall satisfaction with sewerage services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WASC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	88.6%	86%	87%	91%	91%	88%	↔	n/a	-3%
Total WaSCs (2016 sample: 3305)	89.0%	87%	88%	91%	91%	88%	↔	n/a	-3%
Anglian Water (2016 sample: 400)	89.4%	90%	86%	91%	92%	88%	↔	↔	-4%
Dŵr Cymru Welsh Water (2016 sample: 400)	92.0%	85%	91%	95%	96%	93%	↔	↔	-3%
Northumbrian Water (2016 sample: 200)	91.0%	90%	91%	90%	92%	92%	↔	↔	0%
Severn Trent Water (2016 sample: 400)	91.4%	91%	92%	92%	93%	89%	↔	↔	-4%
South West Water (2016 sample: 204)	83.8%	77%	87%	89%	85%	81%	↔	↓	-4%
Southern Water (2016 sample: 200)	85.8%	78%	86%	91%	85%	89%	↔	↔	4%
Thames Water (2016 sample: 200)	85.4%	86%	84%	88%	86%	83%	↔	↔	-3%
United Utilities (2016 sample: 400)	90.4%	87%	89%	93%	93%	90%	↔	↔	-3%
Wessex Water (2016 sample: 501)	91.0%	87%	90%	94%	93%	91%	↔	↔	-2%
Yorkshire Water (2016 sample: 400)	89.2%	85%	87%	91%	92%	91%	↑	↔	-1%

8.2.2 Overall satisfaction with sewerage services – customers of WoCs

The average satisfaction with sewerage services amongst WoC customers is 85% for 2016. The customers of Bournemouth Water are the most satisfied (94%) whereas South East Water customers are the least (81%).

There are no 5 year rolling averages which differ significantly from the total WoC 5 year rolling average of 87.0%.

The general trend for satisfaction with sewerage services is stable. Satisfaction levels for the customers of Portsmouth Water and Bournemouth Water have increased significantly over the last 5 years. There are no other significant company level trends.

The level of satisfaction is significantly different from 2015 where change is highlighted in red in the Figure below.

Figure 83: Overall satisfaction with sewerage services – customers of WoCs

Overall satisfaction with sewerage services	5 year rolling average	Five year company trend					Overall 5 year trend	Company Average vs WOC average	Change since last year
		2012	2013	2014	2015	2016			
Industry (2016 sample: 5420)	88.6%	86%	87%	91%	91%	88%	↔	n/a	-3%
Total WoCs (2016 sample: 2115)	87.0%	83%	85%	91%	91%	85%	↔	87%	-6%
Affinity Water Central (2016 sample: 150)	85.8%	81%	85%	89%	89%	85%	↔	↔	-4%
Affinity Water East (2016 sample: 150)	86.0%	81%	81%	94%	89%	85%	↔	↔	-4%
Affinity Water South East (2016 sample: 151)	85.8%	90%	78%	90%	88%	83%	↔	↔	-5%
Bournemouth Water (2016 sample: 150)	88.4%	83%	83%	91%	91%	94%	↑	↔	3%
Bristol Water (2016 sample: 152)	88.2%	85%	88%	92%	91%	85%	↔	↔	-6%
Cambridge Water (2016 sample: 154)	89.0%	89%	87%	94%	87%	88%	↔	↔	1%
Dee Valley Water (2016 sample: 150)	89.6%	87%	86%	93%	89%	93%	↔	↔	4%
Essex & Suffolk Water (2016 sample: 151)	86.6%	85%	88%	86%	91%	83%	↔	↔	-8%
Hartlepool Water (2016 sample: 151)	92.6%	87%	93%	98%	95%	90%	↔	↔	-5%
Portsmouth Water (2016 sample: 150)	87.0%	81%	85%	91%	88%	90%	↑	↔	2%
South East Water (2016 sample: 304)	85.8%	83%	82%	92%	91%	81%	↔	↔	-10%
South Staffs Water (2016 sample: 151)	88.8%	84%	89%	90%	92%	89%	↔	↔	-3%
Sutton & East Surrey Water (2016 sample: 151)	86.8%	86%	82%	92%	92%	82%	↔	↔	-10%

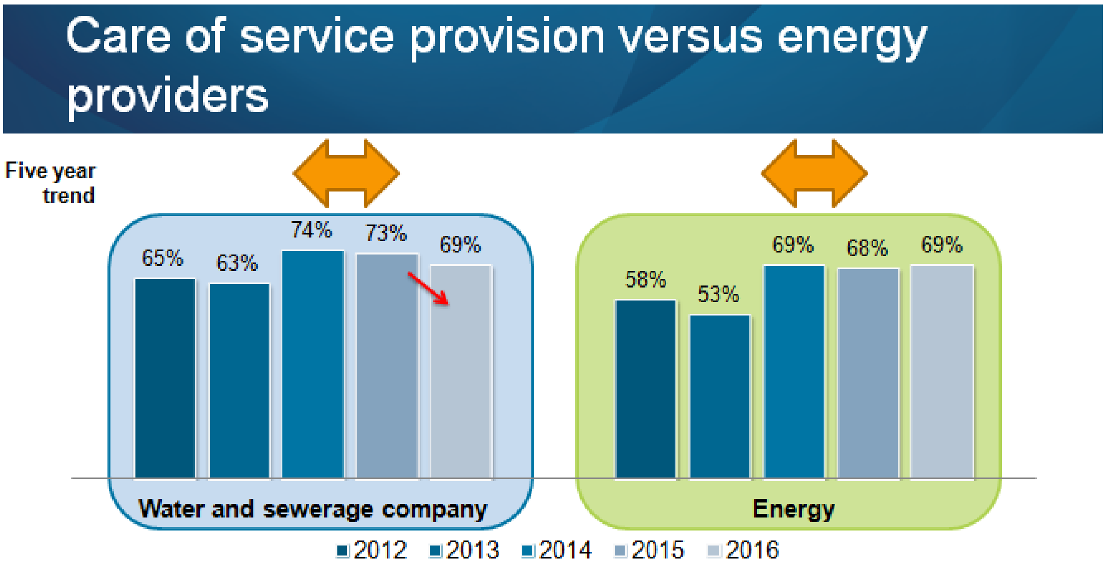
8.3 Comparison of service providers

8.3.1 Comparison with household energy providers care of service provision

Up until 2016, customers have rated water companies more highly than energy companies in terms of caring about the services they provide. . In 2016, perceptions of care are the same for water companies and energy companies.

There has been a significant fall of 4% in perceptions that water companies care since 2015, whilst the perception that energy providers care remains at 69%. The customer perception that companies care about the service they provide is stable for both for both water and energy companies over the last 5 years.

Figure 84: Comparison of household service providers care of service provision



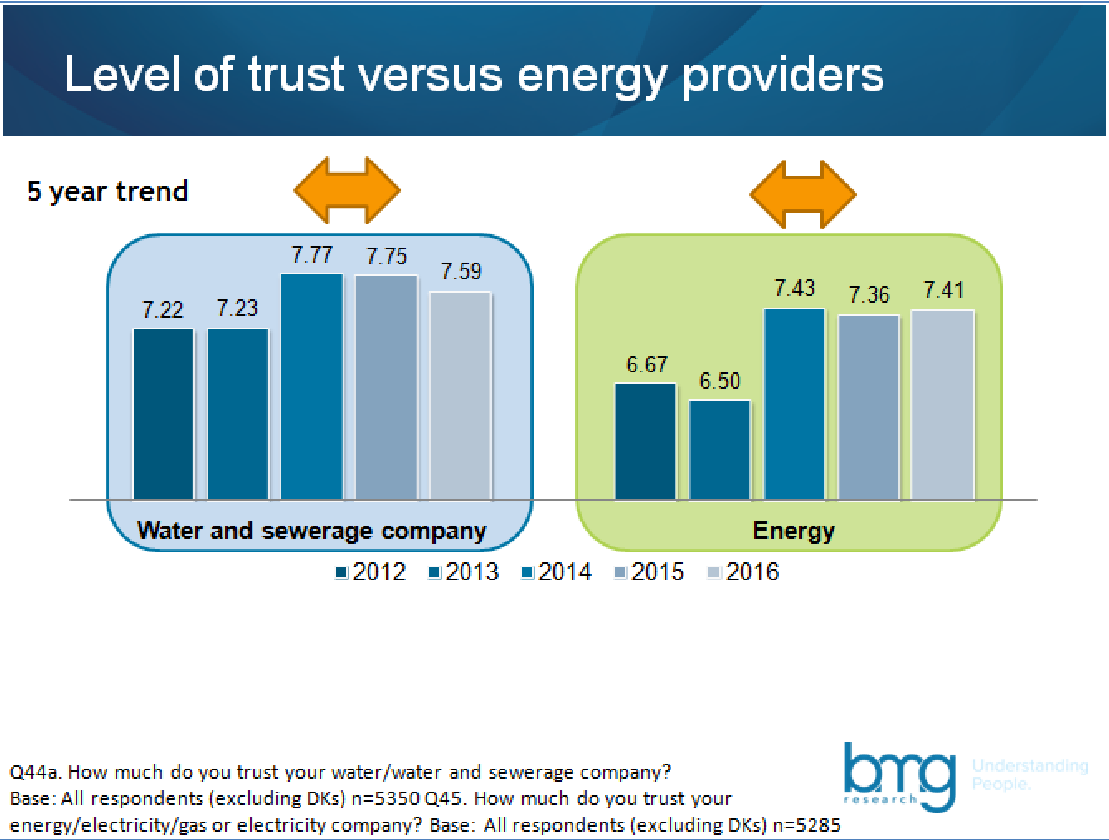
Q42. How much do you agree or disagree that your water/water and sewerage company cares about the service it gives to customers? Base: All respondents (excluding DKs) n=5161
Q43. How much do you agree or disagree that your energy/gas or electricity/electricity company cares about the service it gives to customers? Base: All respondents (excluding DKs) n=5168

8.3.2 Comparison of trust amongst household service providers

On a scale of 1 to 10, respondents were asked to rate how much they trust their water company and their energy provider. Despite a fall in the level of trust in water companies since 2015, trust is still higher than for energy providers though not significantly so (7.59 vs. 7.41).

The overall 5 year trend for trust of water companies and energy providers remains stable.

Figure 85: Comparison of trust amongst household service providers

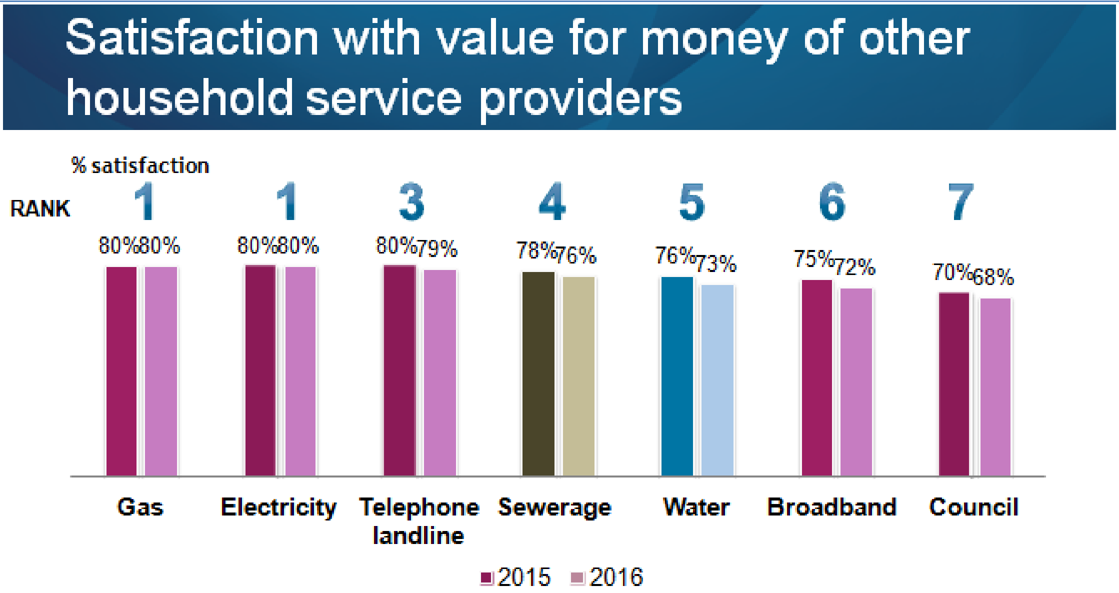


8.3.3 Comparison of the satisfaction with value for money of water/sewerage services against other household service providers

Customers are asked to rate their satisfaction with value for money of other household providers.

The value for money of water and sewerage services ranks as fourth and fifth out of seven household providers in total, as per 2015. Satisfaction with value for money of gas and electricity is highest with eight in ten (80%) satisfied. This is significantly higher than for water and sewerage services. Satisfaction with value for money of telephone landline providers (79%) is also significantly higher than for water and sewerage.

Figure 86: Comparison of the satisfaction with value for money of water/sewerage services against other household service providers



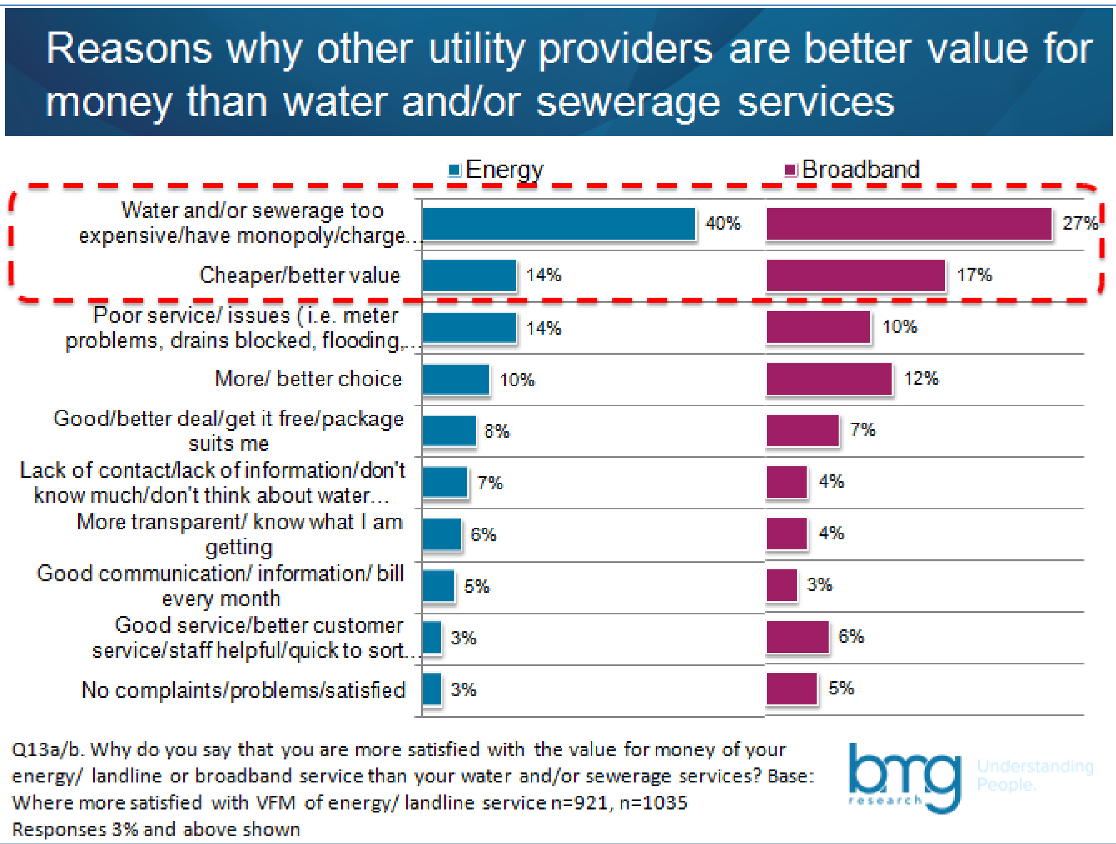
Q9/Q10: Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water/sewerage services in your area?
Q12. Thinking now about such other household utility services, how satisfied or dissatisfied are you with the value for money from services such as ...? Base: Where property has specific service (excluding DKs) n=4478-5256

Those who feel that energy/ landline providers offer better value for money than water and sewerage services were asked their reasons for this.

As shown in the Figure below, the lack of competition in the water market fuels the perception that water companies can charge what they want. Four in ten (40%) who consider energy to be better value for money cite this (vs. 47% in 2015) as do one in four (27%) of those who feel landline providers offer better value for money (vs. 23% in 2015).

This is followed by the view that energy/ landline providers are seen as better value (14% and 17% respectively).

Figure 87: Reasons for thinking energy/landline is better value for money

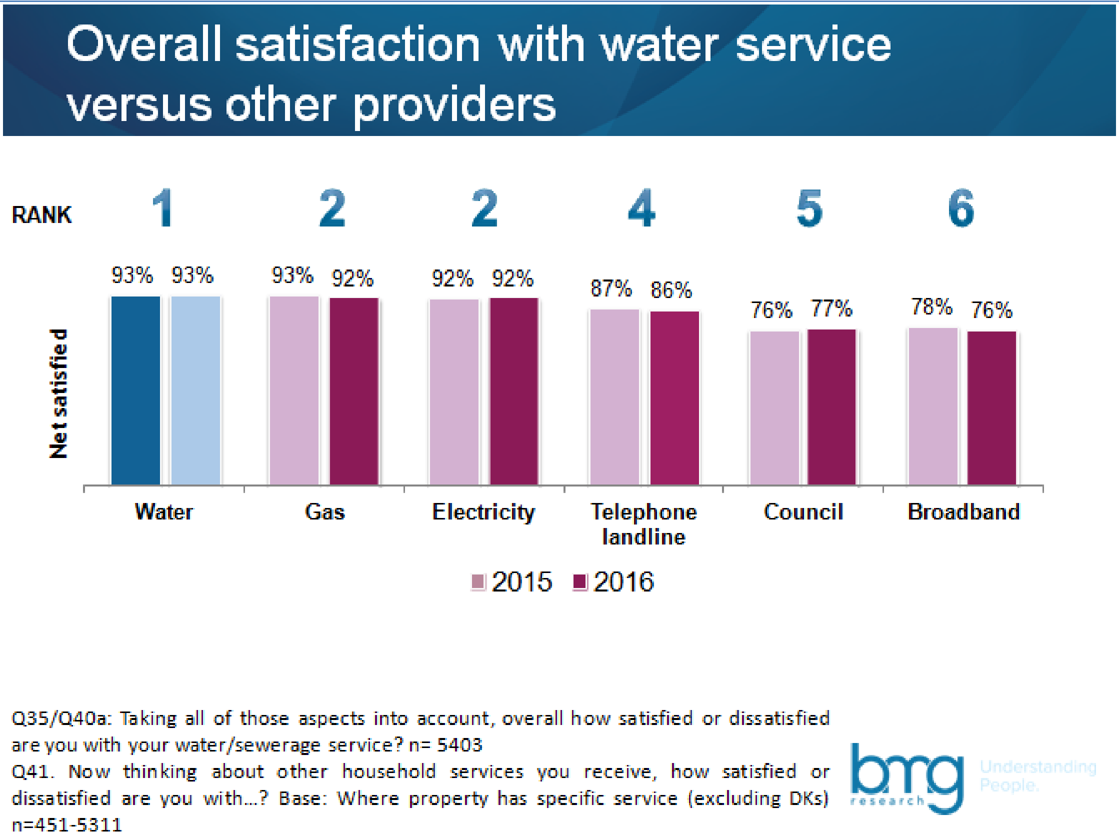


8.3.4 Comparison of water service satisfaction with other household service providers

This section compares service satisfaction for water service providers with other utility providers.

As shown in the Figure below, there is little change in satisfaction levels across all providers since 2015; satisfaction with water services is the highest. The greatest change seen since 2015 is a fall of 2% in satisfaction with broadband providers.

Figure 88: Comparison of water service satisfaction with other household service providers

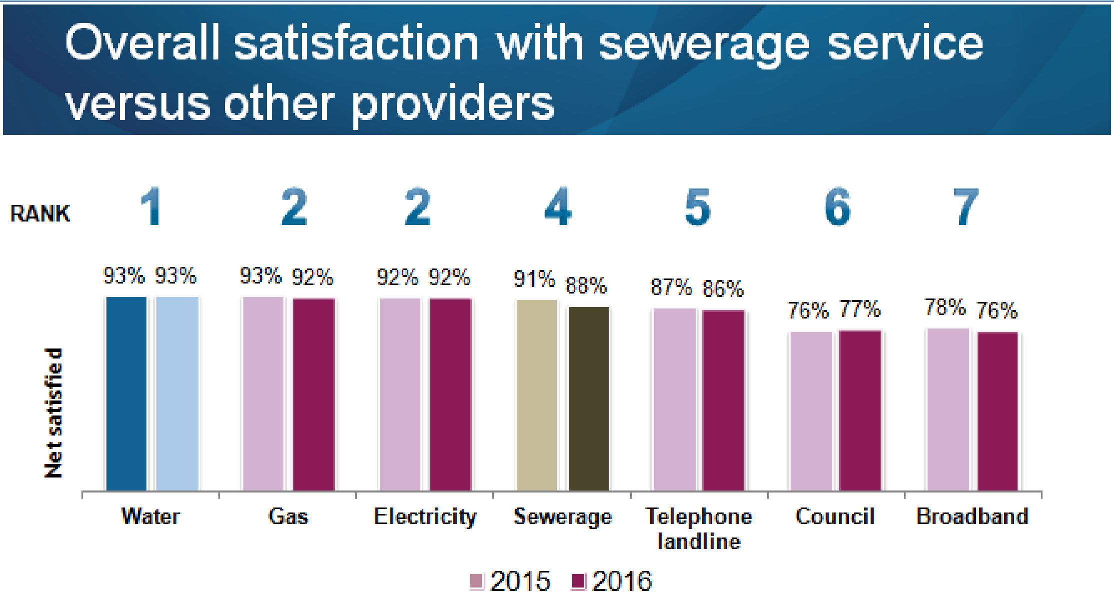


8.3.5 Comparison of sewerage service satisfaction with other household service providers

As shown in the Figure below and seen earlier, there is little change in satisfaction levels across all providers since 2015; satisfaction with sewerage ranks fourth amongst all providers (gas and electricity joint 2nd).

There is some work to do to improve satisfaction with sewerage services to similar levels for water services.

Figure 89: Comparison of sewerage service satisfaction with other household service providers



Q35/Q40a: Taking all of those aspects into account, overall how satisfied or dissatisfied are you with your water/sewerage service? n= 5403, n=4893
Q41. Now thinking about other household services you receive, how satisfied or dissatisfied are you with…? Base: Where property has specific service (excluding DKs) n=4541-5311

9 Conclusions

9.1 Satisfaction with services, value for money and contact handling

Satisfaction with water services remains high; in fact, water is the number one ranked service compared to other household services; gas, electricity, sewerage, telephone landline, Council services and broadband. Satisfaction with the sewerage service is ranked third, sitting just behind gas and electricity which hold joint second place.

Satisfaction with water services remains very high, with at least 90% satisfaction for each aspect of water supply. Satisfaction is highest for the reliability of water supply at 98%, and lowest for water pressure at 90%.

Satisfaction with all aspects of sewerage service has fallen significantly since 2015. This is driven by an increase in ambivalence rather than dissatisfaction, Water Matters 2015 reported a much higher proportion of 'don't know' responses for these questions which, in line with all previous Water Matters surveys, were excluded from the analysis. In 2016 there were fewer 'don't know' responses to exclude and more neutral responses which were included; this has created a step change in the findings. Nevertheless, the 5 year trend for each aspect remains stable.

The value for money of water and sewerage services ranks fourth and fifth out of seven household providers in total, as per 2015. Satisfaction with value for money of gas and electricity is highest with eight in ten (80%) satisfied, significantly higher than for water and sewerage services (73% and 76% respectively). Satisfaction with value for money of telephone landline providers (79%) is also significantly higher than for water and sewerage.

Overall satisfaction with water company contact handling, when it is made, is very good (81%) and the 5 year trend is one of significant improvement. Where dissatisfaction is expressed, customers cite a lack of communication and information provision. Customers were also asked about their satisfaction across various aspects of contact handling. The only aspect where satisfaction has not improved significantly over the last 5 years is 'the feeling that their contact would be resolved' i.e. having confidence that the person they spoke to would do what was needed to resolve their query. As an aspect of contact handling, this is a key measure.

9.2 Views on affordability

Around three-quarters of customers agree that the charges they pay are affordable (74% England, 78% Wales) whereas a total of 12% disagree (12% England, 11% Wales). There is a small group of customers who are significantly less likely to agree that their charges are affordable and these include those who disagree that their charges are fair, those with low levels of trust in the company and those who are unlikely to contact their water company if worried about paying their bill.

In terms of contact, the proportion of customers likely to contact their water company if worried about paying their bill has fallen significantly since 2015 (71% vs. 73% in 2015). Those who disagree that their bills are affordable are less likely to contact their water company compared to those who agree that bills are affordable and this is concerning (60% vs. 75% respectively). In addition, more than one in four (27%) who disagree that bills are affordable would like to know more about the WaterSure tariff, compared to just 10% of the total sample. It is this group of individuals who would benefit most from awareness raising activities around the tariffs and schemes available to make bills more affordable.

9.3 Awareness of choices around water meters and tariffs

Amongst customers who live in households that are not metered, awareness of the scheme whereby they can trial a water meter has fallen significantly over the last 5 years. Currently, awareness that a water meter can be fitted for free is more than twice as high as awareness of the trial scheme. The trial means that within either one or two years (depending on the water company) any customer who asks for a water meter to be fitted can go back to a fixed bill if they decide they prefer this to a bill based on their consumption. Potentially, there is a pool of unmetered customers who would feel more confident about trying a water meter to see if it would save them money, if they knew they could go back to a fixed bill.

9.4 Awareness of WaterSure and social tariffs

Water companies are obliged to provide schemes to help low income customers who struggle to afford their bills. There has been a clear drive in awareness of the WaterSure tariff across both England and Wales with a significant increase evident since 2015 in those aware of, or subscribed to WaterSure.

Awareness of additional services[27] has fallen significantly since 2015. This is driven by a decline in the awareness of customers in England. Awareness is stable for customers in Wales. Although the overall 5 year trend is positive across both England and Wales this is likely to be linked to a change in the question wording in 2014 rather than there being a genuine increase in awareness as the post-2014 trend is so far, largely stable.

Awareness of company specific social tariff schemes is low at 5%, ranging from 1% to 10%. This may reflect variations in the promotion of company specific social tariff schemes across water companies. However, the seemingly low levels of awareness will in part reflect that social tariffs are aimed at the relatively small group of customers who struggle financially.

9.5 General trends

The 5 year trends in customer perceptions of company performance show whether customer perceptions are improving, deteriorating or are broadly stable over time.

The 2016 Water Matters report identifies the following positive trends over the last 5 years:

- More customers agree that their charges are affordable;
- Overall satisfaction with contact with the water company has improved;

[27] Terminology change, 2017 onwards additional services will be referred to as priority services

- Perceptions of all aspects of contact handling with the company have improved (with the exception of feeling that contact would be resolved);
- Awareness of the company's additional services has increased.

9.6 Net Promoter Score and Key Driver Analysis of likelihood to promote company

Net Promoter Scores (NPS) continue to vary between individual water companies ranging from +33 for Welsh Water to -4 for Thames Water, and the satisfaction levels by water company reflect these scores. NPS was first asked in Water Matters 2014 and since this year there has been a significant decline year-on-year (+23 in 2014, +17 in 2015, +13 in 2016). Predicting NPS is complex; it is not a simple cause and effect relationship with another factor; there are a number of predictors which interact to determine the NPS of a company, and these predictors are liable to change and interact differently over time.

Key driver analysis of the 2016 data identified trust and value for money to be the main predictors of whether or not a customer is likely to be a promoter of their water/sewerage company. Given that a key reason for the perception of poor value for money compared to energy and landline/telecoms service providers is the fact that customers do not have a choice, a focus on clearly communicating what customers are getting for their money may address this to an extent.

The third most important predictor of a customer's likelihood to promote their water/sewerage company is their satisfaction with the hardness/softness of water; this is the aspect of water supply where satisfaction is lowest, but also one that is heavily perception based. It is also something which is challenging for water companies to manage because it is largely determined by the source that water comes from.

However, if the hardness/softness of water continues to be a key influencing factor in likelihood to promote, then it may become more important for water companies to find ways of meeting customer expectations. Water is, after all, a product which is consumed. Satisfaction with hardness/softness of water is significantly higher for customers in Wales than England (93% vs. 70%).

Improved communications about where water comes from, hardness/softness and treatment processes may improve perceptions of value for money and hence feed into improved levels of satisfaction and likelihood to recommend.

9.7 Cluster Analysis

Cluster analysis uses techniques to segment customers into different groups depending on how they respond to questions asked. Questions include value for money, overall satisfaction with services, affordability and fairness of charges.

Cluster analysis was repeated this year, using the same approach taken in previous years and found very little movement in the clusters; 56% of customers remain in the "Very satisfied" cluster. However, there has been a significant increase in the proportion of customers in the "Very satisfied" cluster in Wales (63% vs. 58% in 2015) indicating a greater proportion of customers in Wales who are more content with service provision than in 2015.

9.8 Differences in customer views in England and in Wales

Compared to customers in England, customers in Wales are significantly more likely to speak positively of their water/sewerage company in almost every respect. There are just a small number of instances where there is no significant difference between nations:

- Level of agreement with affordability of charges;
- Awareness of company's additional services;
- Awareness that a water meter can be fitted free of charge;
- Likelihood to contact if worried about paying a bill;
- Contact in the last 12 months;
- Satisfaction with contact;
- Satisfaction with water pressure;
- Satisfaction with colour and appearance of tap water.

For completeness, the Table overleaf highlights the significant differences between nations for Water Matters 2016.

Table 2: England and Wales – significant differences 2016

	England	Wales
Satisfaction with water and sewerage services		
Overall satisfaction with water services	92%	95%
Overall satisfaction with sewerage services	87%	93%
Satisfaction with value for money		
Satisfaction with value for money of water services	73%	78%
Satisfaction with value for money of sewerage services	76%	81%
Views on clarity, fairness and affordability of charges		
Clarity of how much needs to be paid and when	85%	89%
Clarity of how the final amount was reached	80%	86%
Agree charges are fair	63%	70%
Integrity		
Care of service provision	68%	77%
Level of trust	7.56	7.92
Awareness of consumer rights and responsibilities		
Awareness of water meter trial period	26%	32%
Awareness of WaterSure	12%	16%
Satisfaction with and views on contact experiences		
Satisfaction with customer services in general	82%	89%
Water on tap		
The reliability of your water supply	96%	98%
Satisfaction with the safety of your drinking water	90%	94%
Satisfaction with taste and smell of tap water	87%	93%
Satisfaction with hardness/softness of water	70%	93%
A sustainable, resilient sewerage system		
Satisfaction with reducing smells from sewage treatment works	73%	82%
Satisfaction with cleaning waste water properly before releasing it back into the environment	76%	85%
Satisfaction with maintenance of sewerage pipes and treatment works	77%	88%
Satisfaction with minimising sewer flooding	76%	87%
Likelihood to recommend as a provider of water services		
Extremely likely to recommend water company (9-10)	38%	50%

10 Appendices

10.1 2015-16 questionnaire

CC Water – Water Matters Survey

Introduction

Good morning/afternoon, my name is …………………….. I am calling from BMG Research on behalf of the Consumer Council for Water, the consumer body for the water industry who are responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are carrying out a survey about water and sewerage services. Your views will help to ensure the water industry continues to provide a fair and affordable service to its customers.

Could you spare some time to answer some questions?

READ OUT IF NECESSARY

Survey Details

The survey should take around 20 minutes. 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 are being recorded for quality and training purposes

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

Screener Questions

ASK ALL **Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey:** **S3 In terms of how you pay your water bills, do you have sole responsibility for paying them, shared responsibility or no responsibility?**		
I have sole responsibility	1	S4
I share payment of the bills	2	S4
I am not the water bill payer in my household	3	S2
Other (specify)	80	S4
Don't know	85	S2
ASK IF NO/DON'T KNOW AT S1. OTHERS GO TO S2 **S2 Is there somebody else in the household who is the water bill payer?** SINGLE CODE		
Yes	1	RETURN TO INTRO
No	2	CLOSE
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. Transport Focus, Energy Ombudsman Which?, Citizens Advice	2	
Market Research	3	
None of the above	4	
	87	D1
ASK ALL **D1 Please record the gender of the respondent** DO NOT ASK		
Male	1	
Female	2	
ASK ALL **D2 Can you please tell me your age? PROMPT WITH BANDS IF NECESSARY** CODE AGE INTO CORRECT BANDING. 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	
D3 MOVED TO END OF THE SURVEY		
ASK ALL **D4a <u>At home,</u>** do you have: READ OUT AND CODE FOR EACH AND THERE SHOULD BE 3 RESPONSE CODES FOR EACH a) Telephone landline, b) Access to broadband		
Yes	1	
No	2	
Don’t know	86	
IF D4a/1 (IF HAVE A LANDLINE) **D4b Do you use your landline for telephone calls?**		
Yes	1	
No	2	
D5 – D9 MOVED TO THE END OF THE SURVEY		

ASK ALL **Q1a Who 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 "Stated water company differs from sample"**		
Anglian Water Services Ltd		
Dŵr Cymru Cyfyngedig (Welsh Water)	1	
Northumbrian Water Ltd	2	
Severn Trent Water Ltd	3	
South West Water Ltd	4	Q2
Southern Water Services Ltd	5	
Thames Water Utilities Ltd	6	
United Utilities Water Plc (North West Water)	7	
Wessex Water Services Ltd	8	
Yorkshire Water Services Ltd	9	
	10	
Water only companies		
Bournemouth Water Plc		Q3
Bristol Water Plc	11	
Cambridge Water Company Plc	12	
Cholderton & District Water Company Ltd	13	CLOSE
Dee Valley Water Plc	14	
Essex & Suffolk Water	15	
Affinity Water South East (formerly Veolia Water Southeast and	16	
Folkestone & Dover Water Services)	17	Q3
Hartlepool Water Plc		
Portsmouth Water Plc	18	
South East Water Plc (including Mid Kent Water Plc)	19	
South Staffs Water Plc	20	
Sutton & East Surrey Water Plc	21	
Affinity Water East (formerly Veolia Water East Ltd and Tendring	22	
Hundred Water Services)	23	
Affinity Water Central (formerly Veolia Water Central and Three Valleys		
Water)	24	
Stated water company differs from sample		
Don't know	25	Go to Q1b
	85	
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 **Q1b Is your postcode <*insert from sample*>?** Yes, same as sample Incorrect – Enter correct postcode (first part and first digit of second part)	1 2	GO TO Q1c
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?**		GO BACK AND CODE Q1A THEN TO FILTER AT Q2
Yes	1	CLOSE
No	2	

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	**GO TO Q1a2**
Don't know	85	GO TO Q1a2
ASK IF CODE 1,4,9 AT Q1a (WASCs WITH SEPARATE BILLS) Q1a2 Some customers on the border between two water companies get a bill from each company for different parts of the service. Do you receive a bill from any other water and/or sewerage company?		
Yes	1	
No	2	
Don't know	85	
ASK IF CODE 1 AT Q1a2 Q1a3 Can you tell me the name of this other water and/or sewerage company?		
Anglian Water Services Ltd	1	
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	
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	N/A
Dee Valley Water Plc	15	
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	
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	
ASK COMBINED BILLS IF **Q1a/17,20,22 AND Q5a/7** **OR <u>NOT</u> SEPARATE BILLS ROUTING** **Q7a How much do you agree or disagree that your water and sewerage bill makes it clear how much needs to be paid and when?** 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 SEPARATE BILLS IF **Q1a/1-10 AND Q2/2 (ONLY ASK Q7b and Q8b only (not Q7c and Q8c) OR Q1a/11,19 regardless OR Q1a/12-18,20-24 AND Q3/1 (ONLY ASK Q7b and Q8b only (not Q7c and Q8c) OR Q1a/17,20,22 AND Q5a/5 OR Q1a/6 AND Q2/3 AND Q5a/7 OR Q1a/7 AND Q2/3 AND Q5a/5 OR Q1a16 AND Q5a/1 OR Q1a/1 AND Q1a3/16 OR Q1a9 AND Q1a3/11 OR Q1a/11 AND Q5a/9 OR Q1a/9 AND Q1a3/4 OR Q1a/4 AND Q1a3/9 OR Q1a/1 AND Q1a3/4 OR Q1a/4 AND Q1a3/1** **GRID QUESION** **Q7b How much do you agree or disagree that your water bill makes it clear how much needs to be paid and when?** **And your sewerage bill?** SAME SCALE 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 COMBINED BILLS IF **Q1a/17,20,22 AND Q5a/7** **OR <u>NOT</u> SEPARATE BILLS ROUTING** **Q8a And do you agree or disagree that it is clear how the final amount of your bill was reached?** 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 SEPARATE BILLS IF **Q1a/1-10 AND Q2/2 (ONLY ASK Q7b and Q8b only (not Q7c and Q8c) OR Q1a/11,19 regardless OR Q1a/12-18,20-24 AND Q3/1 (ONLY ASK Q7b and Q8b only (not Q7c and Q8c) OR Q1a/17,20,22 AND Q5a/5 OR Q1a/6 AND Q2/3 AND Q5a/7 OR Q1a16 AND Q5a/1 OR Q1a/1 AND Q1a3/16 OR Q1a9 AND Q1a3/11 OR Q1a/11 AND Q5a/9 OR Q1a/9 AND Q1a3/4 OR Q1a/4 AND Q1a3/9 OR Q1a/1 AND Q1a3/4** **OR Q1a/4 AND Q1a3/1** **GRID QUESTION** **Q8b And thinking about your water and sewerage services, do you agree or disagree that it is clear how the final amount of bill was reached?** SINGLE CODE. READ OUT IF NECESSARY For your water services? For your sewerage service?		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	

Company Information

ASK ALL **GRID QUESTION** **Q9 Thinking now about value for money, how satisfied or dissatisfied are you with the <u>value for money</u> of the <u>water services</u> in your area?** SINGLE CODE. READ OUT DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (SEPTIC TANK) **And the sewerage services in your area?** 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	
Q12Thinking now about other household utility services, how satisfied or dissatisfied are you with the <u>value for money</u> 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		
Lack of contact/lack of information/don't know much/don't think about	7	
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		
More transparent/ know what I am getting	10	
Better technology/ manage bills on line	11	
Good communication/ information/ bill every month	12	
Other (please specify)	13	
Don't know	80	
	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) **GRID QUESTION** **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 ASK ALL CODED 11-24 AT Q1A AND Q3 = 2 (WOCs) And the sewerage charges?		
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	
South West Water £50 Government contribution Q PARKED		

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 Fairly likely Not very likely Not at all likely Don't know	 1 2 3 4 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 READ OUT Your property already had meter when moved in You asked for a meter to be fitted Had no choice - water company fitted one as part of a metering scheme Other (specify) Don't know	 1 2 3 80 85	
ASK ALL EXCEPT AFFINITY SE, SOUTHERN WATER AND SOUTH EAST WATER (CODES, 17, 6 AT Q1a) AND AFFINITY WATER CENTRAL AND THAMES WATER – SAMPLE 2 (CODE 24, 7 AT Q1A AND FLAGGED SAMPLE 2 IN SAMPLE FILE) PLUS ALL CM POSTCODES FOR AFFINITY Q6/2/85 **Q20 Were you aware that ...:** SINGLE CODE FOR EACH STATEMENT **Scale: 1=Yes, 2= No, 85= Don't know** 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/6,7,13,17,19,20,21,22,23,24, [two years]: Q1a/1-5,8-12,15-16,18 **Scripting note: These companies offer 1 year to revert: Cambridge, South Staffs, Affinity, Portsmouth, Sutton and East Surrey, Thames, Southern and South East.** **<u>All the rest offer 2 years</u>**		WILL BE ROUTED FROM POST-CODE
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/WaterSure Wales'/**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 Yes, have subscribed to it No, but would like to know more No, but do not need it Don't know	 1 2 3 4 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) Lite social tariff **Anglian Water Assistance Fund** **Aquacare Plus** Hartlepool Water **Aquacare plus** **Trust Fund**		
Dwr Cymru (Q1a/2**)** **HelpU social tariff** **Customer Assistance Fund** Northumbrian Water **Support Plus social tariff** **Support Plus Arrears**		
Severn Trent Water (Q1a/4) **Severn Trent Trust Fund** **Big Difference social tariff scheme**		
South West Water (Q1a/5) **WaterCare Plus** **Restart** **Fresh Start**		
Southern Water (Q1a/6) **Essentials social tariff** **New Start** **Support tariff**		
Thames Water (Q1a/7) **Charitable Trust/Trust Fund** **WaterSure Plus** **Customer Assistance Fund**		
United Utilities (Q1a/8**) Help to Pay social tariff** **Charitable Trust/Trust Fund** **Support Tariff** **Arrears Allowance Scheme**		
Wessex Water (Q1a/9) **Restart** **Restart Plus** **Assist** **WaterSure Plus**		
Yorkshire Water (Q1a/10) **Water Support social tariff** **Yorkshire Water Community Trust** **Resolve** Bristol Water (Q1a/12) **Restart** **Restart Plus** **Assist** **WaterSure Plus**		
Cambridge Water (Q1a/13) **Assure social tariff** **NewStart** Dee Valley Water **Here2Help social tariff** Portsmouth Water **Helping Hands social tariff** **Arrears Assistance Scheme**		
Affinity Water (Q1a/17,23,24) **Li£t (pronounced Lift)**		
South East Water **Helping Hands Scheme** **Social Tariff**		
South Staffs Water (Q1a/21) **Assure social tariff** **South Staffs Water Charitable Trust Fund**		
Sutton and East Surrey (Q1a/22) **Social tariff** **Clear Start**		

<ALL> Other (specify)		
No, not aware of any		
Q24 PARKED		
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		
Yes, have subscribed to it	1	
No, but would like to know more	2	
No, but do not need it	3	
Don't know	4	
	85	
Q26, Q27a, Q27b PARKED		
ASK ALL **Q28 Have you contacted your** [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a = '**water'] / [**ALL OTHERS = '**water and sewerage'] company in the past 12 months?** SINGLE CODE		
Yes – water and sewerage company	1	Q29
Yes – water company	2	
Yes – sewerage company	3	
No	4	NQ1a
Don't know	85	
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ1a **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 IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ1a **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 NQ1a **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 Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	1 2 3 4 5 85	
ASK ALL **NQ1a Taking everything into account; such as meter readings, bill provision and frequency, payment options and other customer service issues – how satisfied are you with the customer service of** [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 Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know	1 2 3 4 5 85	
ASK IF NQ1a=4/5 **NQ1b** **Why do you say that you are dissatisfied with the customer service of** [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]?** VERBATIM COMMENT		
Q32,Q33a-c PARKED		

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		
Fairly satisfied	1	
Neither satisfied nor dissatisfied	2	
Fairly dissatisfied	3	
Very dissatisfied	4	
Don’t know	5	
	85	
Q36 PARKED		
Q36b PARKED		
ASK ALL **NQ2 And how confident are you that in the longer term your water supply will be available without restriction, that is, not subject to hosepipe bans or other restrictions on use?**		
Very confident	1	
Fairly confident	2	
Neither confident nor unconfident	3	
Fairly unconfident	4	
Very unconfident	5	
Don’t know	85	

Q37a/Q37b have been removed for 2015/2016

Section D: Keeping it Clean

Q38 PARKED		
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	
Q40b PARKED		
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 Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 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 VERBATIM**		
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	
Q46 – Q47 PARKED		

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 Extremely likely to recommend	0 1 2 3 4 5 6 7 8 9 10	
ASK ALL WoCs (Q1a/11-24) without septic tank and Q3/2 **Q48b And on the same scale of 0 to 10, 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 Extremely likely to recommend	0 1 2 3 4 5 6 7 8 9 10	
Q154-Q155 PARKED		
WELSH WATER SPECIFIC QUESTIONS REMOVED		

Section E: Speaking up for Water Consumers

Q49-Q54 PARKED		

Q54b has been deleted for 2015/2016

Section F: Background

And finally a few questions about you. These questions will assist with us with analysing the results by different demographics to ensure CC Water fully understand views by all household types.

READOUT: The next few questions are about your occupation.		
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	Q55
Not applicable - Full time student	5	Q55
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 IF CODE 5-8 AT D2. OTHERS GO TO Q55 **D3 Are you retired?** SINGLE CODE		
Yes	1	
No	2	
Refused	86	
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 ANNUAL 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 £850 pm	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	
£850 - £1649	£50,000 to £74,999	6	
	£75,000 to £99,999	7	
	£100,000 or more	8	
	Don't know	85	
	Refused	86	
£1650 - £2499			

ASK ALL
Q58 And are you/someone in your household currently receiving any benefits or tax credits? SINGLE CODE

	Yes	1	
	No	2	
£2500 - £3349	Don't know	85	
	Refused	86	

ASK ALL
Q59 What type of accommodation do you live in?
READ OUT SINGLE CODE

£3500 - £4199			
	Owner occupied	1	
	Private rental	2	
	Council tenant	3	
	Housing Association tenant	4	
£4200 - £6249	Leaseholder	5	
	Don't know	85	
	Refused	86	

£6250 - £8349

£8350 or more

ASK ALL **Q60 Would you say you live in an urban or rural area?** READ OUT.SINGLE CODE Urban Rural Suburban/semi rural Don't know	 1 2 3 85	
ASK ALL **Q61 Do you have access to the internet?** Yes No Don't know Refused	 1 2 85 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 [ʽinsert 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 No	 1 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 BMG Research comply with the code of conduct you can call them on 0500 39 69 99.

10.2 Sample profile

Table 3: Sample profile

		Unweighted		Weighted	
		No	%	No	%
Gender	Male	2537	47%	2520	46%
	Female	2883	53%	2900	54%
Age	18-29	151	3%	168	3%
	30-44	1163	21%	1242	23%
	45-59	1885	35%	1855	34%
	60-74	1433	27%	1372	26%
	75+	739	14%	734	14%
SEC	Higher managerial, administrative & professional occupations	2193	45%	2197	45%
	Intermediate Occupations	1009	21%	1040	21%
	Routine & manual occupations	1314	27%	1305	27%
	Long term unemployed/ student	331	7%	322	6%
Household Composition	With children	1362	27%	1405	28%
	Without children	3597	73%	3568	72%
Ethnicity	White	4632	94%	4507	91%
	Mixed	41	1%	49	1%
	Asian	144	3%	223	5%
	Black	61	2%	107	2%
	Other	48	1%	51	1%
Disability in household	Yes	1245	23%	1274	24%
	No	3799	77%	3792	76%
Tenure	Owner occupied	3652	75%	3624	74%
	Private rental	513	11%	511	10%
	Council tenant	403	8%	402	8%
	Housing Association tenant	266	5%	298	6%
	Leaseholder	34	1%	40	1%

		Unweighted		Weighted	
		No	%	No	%
Meter in household	Yes	2926	55%	2754	52%
	No	2389	45%	255	48%
Meter fitting (where meter present)	Already fitted	1449	50%	1327	49%
	Requested fitting	949	33%	919	34%
	Fitted as part of a metering scheme	439	15%	422	16%
Income	Less than £10,000	390	11%	392	12%
	£10,000 to £19,999	769	23%	771	23%
	£20,000 to £29,999	612	18%	619	18%
	£30,000 to £39,999	484	14%	496	15%
	£40,000 to £49,999	322	9%	336	10%
	£50,000 to £74,999	452	13%	422	12%
	£75,000 to £99,999	211	6%	212	6%
	£100,000 or more	173	5%	159	5%
Receive benefits	Yes	1086	23%	1144	24%
	No	3709	77%	3662	76%
Internet access	Yes	4336	88%	4319	88%
	No	5669	12%	573	12%
Urbanicity	Urban	2191	46%	2400	50%
	Rural	1426	30%	1282	27%
	Suburban/semi rural	1177	25%	1102	23%

10.3 Sample bases

Table 4: Sample base sizes

All respondents	Sample base size
Total	5420
England	4868
Wales	522
Water and Sewerage Companies	3305
Water only Companies	2115
Anglian Water Services Ltd	400
Dŵr Cymru Cyfyngedig (Welsh Water)	400
Northumbrian Water Ltd	200
Severn Trent Water Ltd	400
South West Water Ltd	204
Southern Water Services Ltd	200
Thames Water Utilities Ltd	200
United Utilities Water Plc	400
Wessex Water Services Ltd	501
Yorkshire Water Services Ltd	400
Bournemouth Water	150
Bristol Water	152
Cambridge Water	154
Dee Valley Water	150
Essex & Suffolk Water	151
Affinity Water Southeast	151
Hartlepool Water	151
Portsmouth Water	150
South East Water	304
South Staffs Water	151
Sutton & East Surrey Water	151
Affinity Water East	150
Affinity Water Central	150

10.4 Technical analysis note

Previously, Friedman tests have been used to measure trend. A Friedman test in this context is a non-parametric alternative to ANOVA, and measures whether one of the annual observations is significantly different (either higher or lower) from all others. Therefore, Friedman is subject to spikes in the data in any single year - this is not to say that these spikes are a poor representation of opinion at a given time, but it should be stressed that each annual observation is an estimate with confidence intervals. These spikes can obscure any trend, which is why a smoothing process is used to reduce the effect of these, and make the underlying trend more easily observable.

When undertaking any work on raw proportions, a logit of the proportion is used rather than the proportion itself.

When assessing trend, it is common to smooth the data points over time and is called exponential smoothing. Dependant on the alpha values, this can help smooth out spikes or bumps in the data. Alpha values of over 0.5 give greater weight to the most recent data, values below 0.5 gives greater weight to ALL preceding data. (I've used alpha 0.5).

The Mann-Kendall trend test tests how many smoothed values are larger (or smaller than) preceding values - so a score of 1.0 here means that each successive smoothed value increases over the previous (a monotonic increase) - 0.9 that there is a tie between years somewhere, but generally increasing).

All positive/negative 5 year trends have been indicated throughout the report with a or a where a significant trend has not been identified, this has been denoted by .

10.5 Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2013.

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not be publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

The Consumer Council for Water

1st Floor, Victoria Square House, Victoria Square, Birmingham B2 4AJ
Visit our website: www.ccwater.org.uk
Follow us @WaterWatchdog

Contact: Steve Grebby, Policy Manager