



The voice for water consumers
Y corff sy'n rhoi llais i ddefnyddwyr dŵr



On behalf of CCW

June 2020

Water Matters

**Household customers' views
on their water & sewerage
services 2019**

JN: 5889



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CCW: Water Matters 2019 – Foreword

We started tracking customers' views on their water companies in 2011 and, since then, the results have shown that most customers tend to be positive about the water industry. But several areas, especially perceptions of fairness and satisfaction with value for money of water and sewerage services, have plateaued at a level that could be improved.

This year, we are pleased to see increases in these areas. However, companies will need to work to ensure that they not only maintain this momentum but also improve other aspects of their performance. To help companies identify where they could improve, we delved into the attitudes and circumstances that drive customer responses in the accompanying Highlights Report.

We introduced a new question this year, to ascertain what customers feel about company communications and why. Only 49% across England and Wales feel that communications are good, which is disappointing. However, there are some clues within other Water Matters data as to where communications are failing.

Water companies must engage with customers at all levels. On a day-to-day basis, they need to provide clear and accessible information and make every customer contact count. They also need to engage about long-term plans for services, and the challenges that they will have to address if they are to continue to provide a reliable water supply and/or sewerage services in the future.

However, engagement is more than communications and consultation about services - it is also about building relationships with consumers, some of whom are less inclined to look at information that water companies routinely send with bills. If companies seek to make a positive contribution to their local community, by improving the social, environmental and economic impacts of their operations, this may encourage those switched-off customers to engage more with their messaging, or to reach out to companies when they need help and advice.

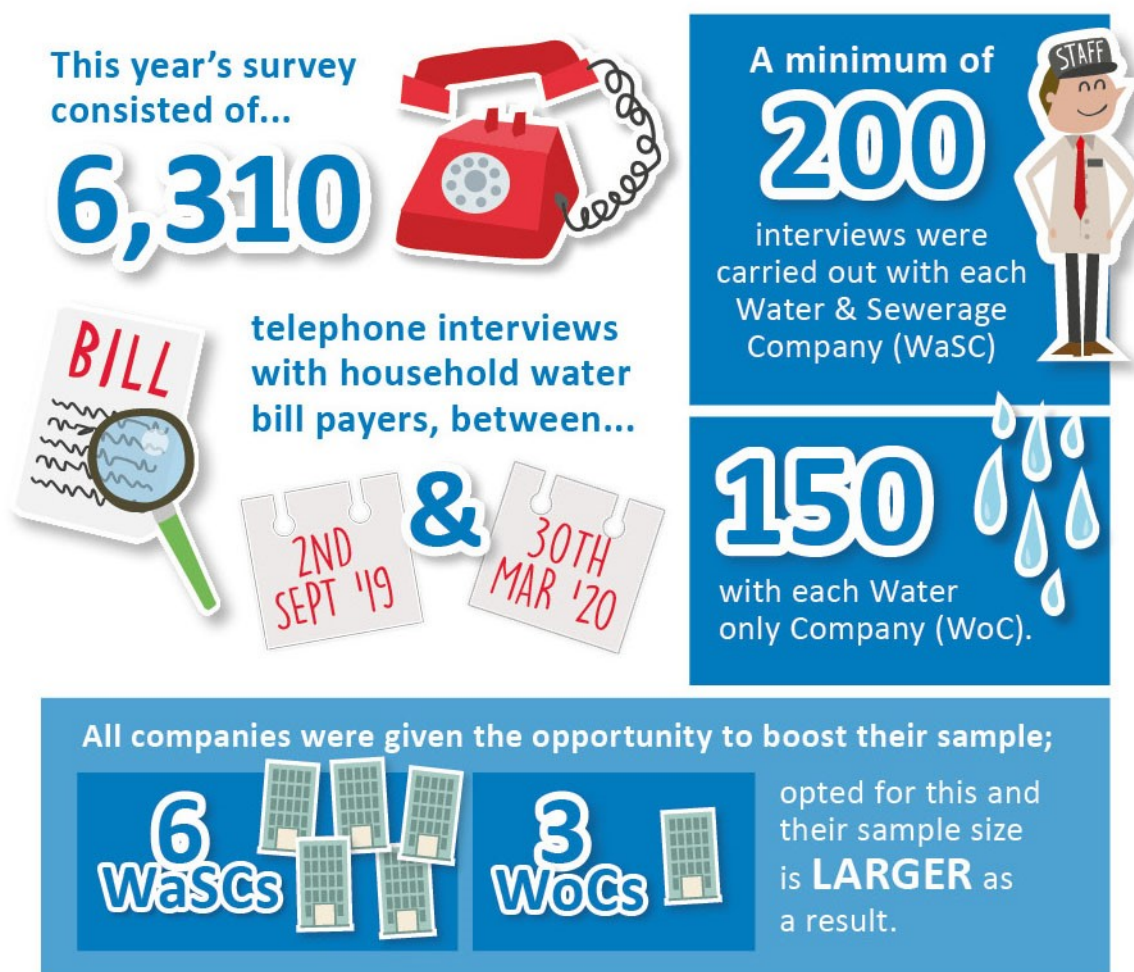
We would like to see companies take ownership of this data, so that they can use it and work out what they need to do to influence their own customers' perceptions, in a way that drives positive change for all consumers.

Dr Mike Keil
Head of Policy and Research
Consumer Council for Water

Executive Summary

Every year since 2006, the Water Matters survey has asked a representative sample of water bill payers from households in England and Wales for their views and experiences of their water, sewerage services, and related charges.

Figure 1. Overview of methodology



Footnote: Companies are given the opportunity to boost their sample size, as the larger the sample size, the smaller the confidence interval/margin of error (i.e. the surer a company can be that the data truly reflects the opinions of their customers). Data is weighted, based on total household water connections, so despite companies boosting, the data at national levels is still representative.

Customers' views are described for England and Wales; for England and Wales separately; for the 11 companies that supply water and Sewerage (Water and sewerage companies - WaSCs) and companies that supply just water (Water only companies - WoCs); and by each water company¹. This includes nine-year trend analysis² to determine the direction of travel – upward trend, flat or downward trend – for each measure.

Fieldwork was completed before the effects of the COVID-19 lockdown would have been fully felt by households³. This survey therefore reflects 'business as usual' views.

¹ The views of customers of specific water companies are in the data report which follows.

² Trends are analysed over the last nine years from 2011, as this is the first year that company specific data is available from. Some shorter trends exist (4 years, 6 years). Trend analysis is only conducted when data exists for all of the previous years when the question format, routing & text has remained the same over each period.

³ Lockdown started on the evening of the 23rd March.

Key Findings

Satisfaction with water and sewerage services

Satisfaction with water services has increased significantly since 2018.

- In 2019, 91% of customers in England and Wales are satisfied with their water supply; satisfaction has been consistent over the last nine years (Figure 2); however, it has increased significantly since 2018 (90%)⁴. To put this into context, customer satisfaction with services from comparator utilities⁵ has also increased since 2018 but customers are still more satisfied with their water service (although not sewerage services) than with any other utility service.
- Overall satisfaction with water supply is significantly higher in Wales compared to England in 2019 (94% vs. 91% for water respectively).
- Satisfaction levels for different aspects of water supply service range from 96%-87%, apart from 'hardness/softness' of water which is consistently lower (67% satisfied in 2019). Satisfaction with the following aspects of water supply has increased significantly since 2018: reliability of water supply (96% in 2019 vs 95% in 2018), water pressure (88% in 2019 vs 86% in 2018) and taste and smell of tap water (87% in 2019 vs 85% in 2018).
- Just under three-quarters (74%) of customers in England and Wales are confident that their water supply will be available in the longer term without being subject to hosepipe bans or other restrictions on use.

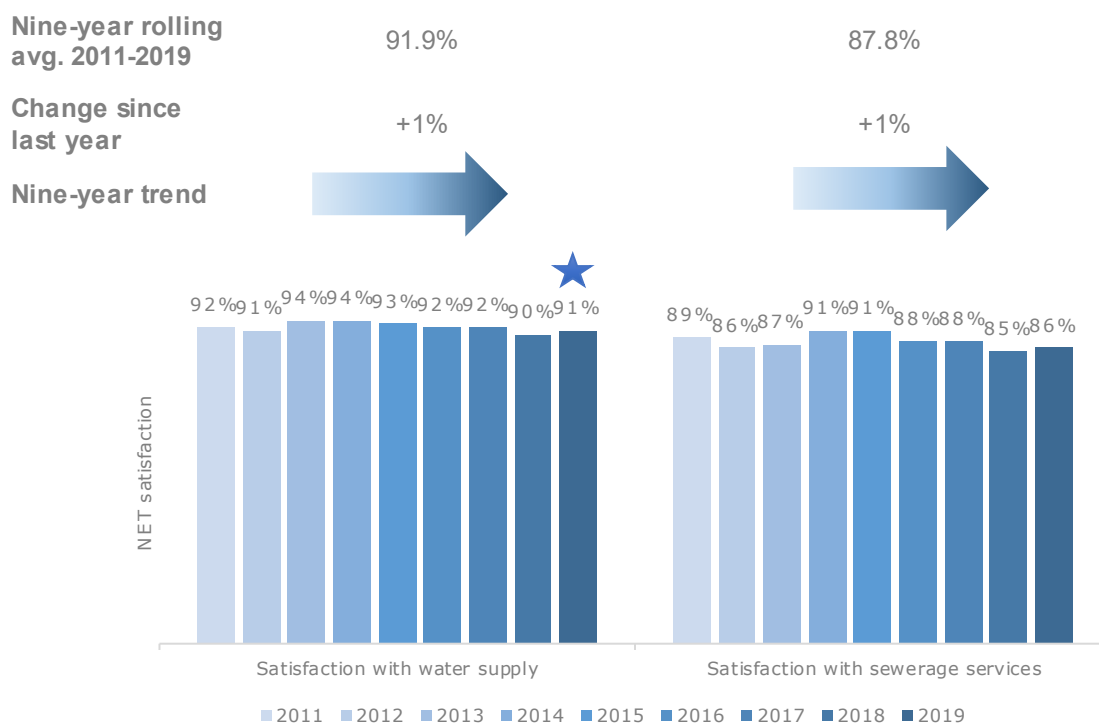
Satisfaction with sewerage services has increased slightly since 2018.

- In 2019, 86% of customers in England and Wales are satisfied with their sewerage services. Satisfaction has been consistent over the last nine years (Figure 2). Customers are more satisfied with their sewerage service than they are with their landline, broadband and council services. Customers are more satisfied with their energy services (gas and electricity) and their water service, than they are with their sewerage service.
- Satisfaction with sewerage services in Wales has fallen significantly since 2018 (86% in 2019 vs 90% in 2018).
- Satisfaction with different elements of sewerage services ranges from 81%-78% (maintaining sewers and drains, reducing smells, cleaning wastewater and minimising sewer flooding), although satisfaction with activity to reduce smells from sewage treatment works has increased significantly in 2019 (from 77% in 2018 to 80% in 2019). All nine-year trends for satisfaction with aspects of sewerage services are flat, with the exception of minimising sewer flooding, which shows a downward trend.

⁴ As we report on large sample sizes within Water Matters, most year on year changes that fall within the higher (>90%) or lower (<10%) percentage ranges are highlighted as significant – see Table 3 Statistical reliability.

⁵ Including Electricity, Gas, Telephone Landline, Broadband and Council services.

Figure 2. Overall satisfaction with water and sewerage services⁶



★ Significant difference between 2018 and 2019 data.

⁶ The rolling nine-year averages are calculated based on the total valid base of weighted data at each time point. The nine-year trends are assessed using the Mann-Kendall method (Mann 1945, Kendall 1975). The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data.

Care and trust

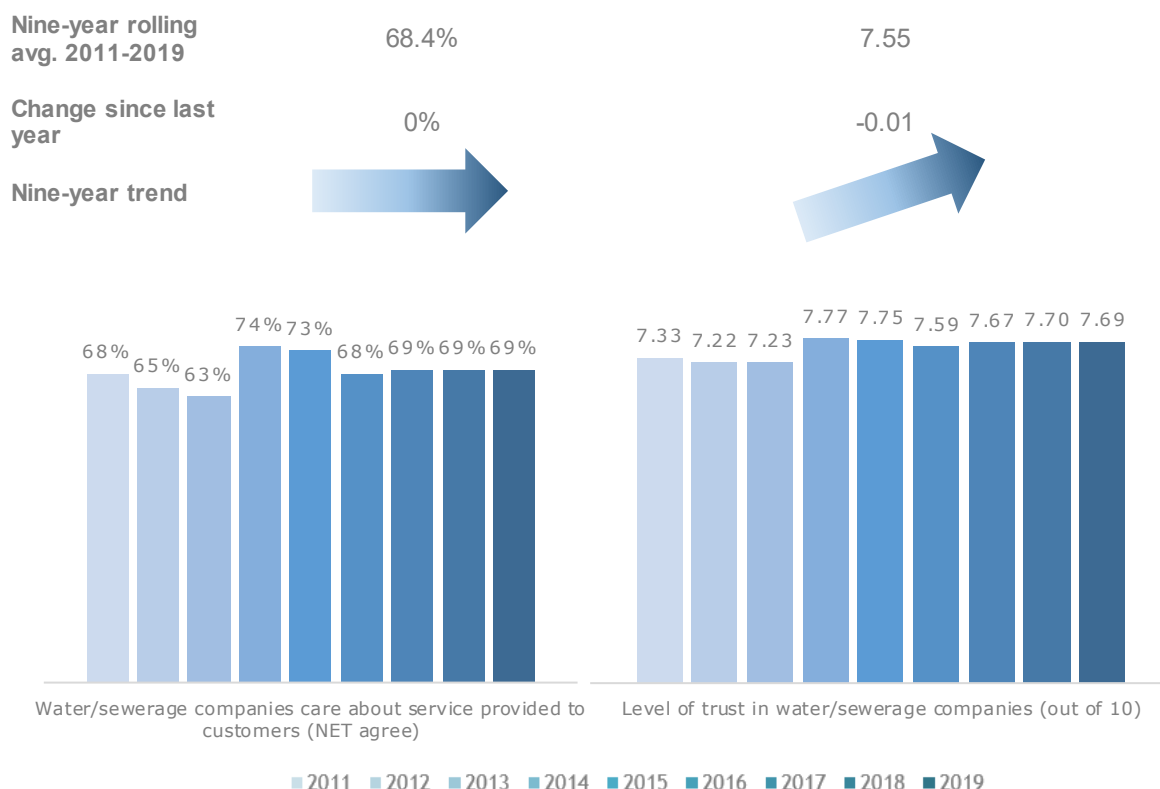
Just over two thirds of customers believe that water companies care about the services they provide; water companies are thought to care more about their services than energy companies

- 69% of customers across England and Wales agree that their water company cares about the services they provide. The overall nine-year trend for England and Wales remains flat (Figure 3).
- Customers in Wales are significantly more likely (74%) than those in England (68%) to agree that their company cares.
- The proportion of customers agreeing that their energy company cares about the services they provide has increased significantly since 2018 (65% in 2019 vs 60% in 2018).

Customers' trust in water companies has increased since 2011 and is greater than for energy companies.

- Trust in water companies has increased over the last nine years, from 7.33 in 2011 to 7.69⁷ (scale of 1 of 10) in 2019 (Figure 3).
- Trust shows an improving trend in both England and Wales, although trust is significantly higher in Wales than in England (7.94 vs. 7.67 respectively).
- Water companies are still more trusted than energy companies (7.69 vs. 7.30 respectively).

Figure 3: Care and trust in water/sewerage companies



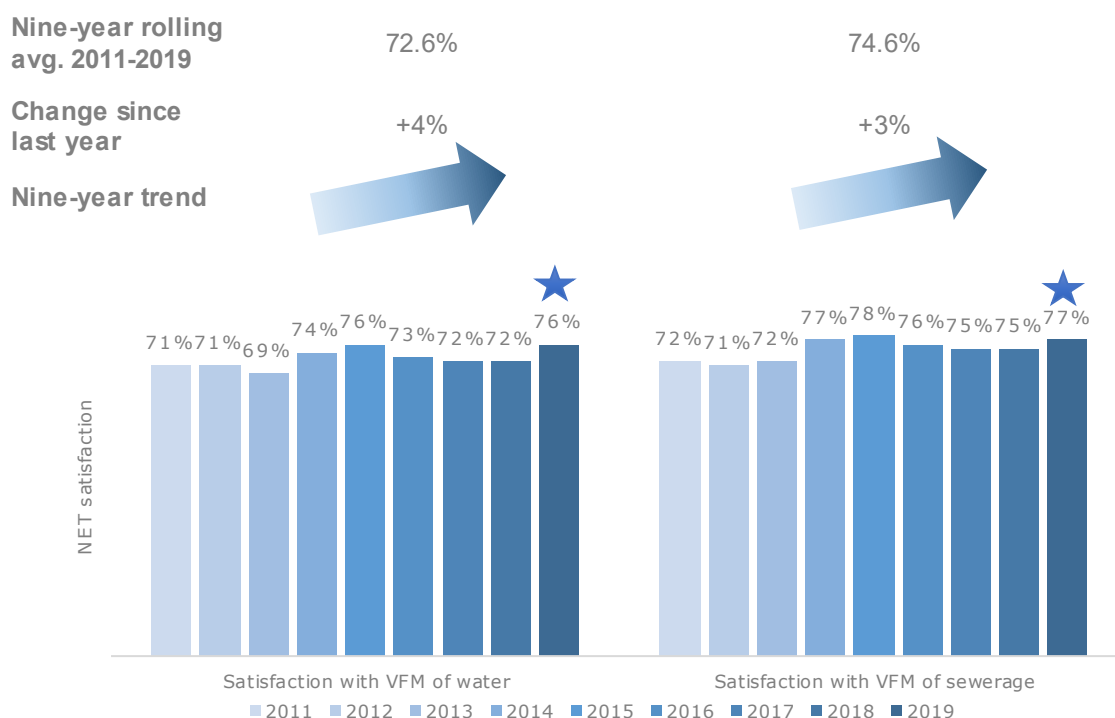
⁷ Question is rated on a scale from 1 to 10, where 1 is 'do not trust them at all' to 10 'completely trust them'. The figure reported here is an average of all trust scores.

Value for money

Satisfaction with value for money of water and sewerage services has increased significantly since 2018 and the nine-year trends show an increase (previously flat trend).

- 76% of customers in England and Wales are satisfied with the value for money of their water services, significantly higher than in 2018. The nine-year trend shows an increase (Figure 4).
- 77% of customers in England and Wales are satisfied with the value for money of their sewerage services and this increased significantly since 2018 (75%). The nine-year trend shows an increase (Figure 4).
- To put these figures in context, customers are more satisfied with the value for money of their water and of their sewerage services than services of all other utility providers (landline services 75%, electricity 75%, gas 75%, broadband 67%, and council services 60%).

Figure 4: Satisfaction with value for money of water and sewerage services



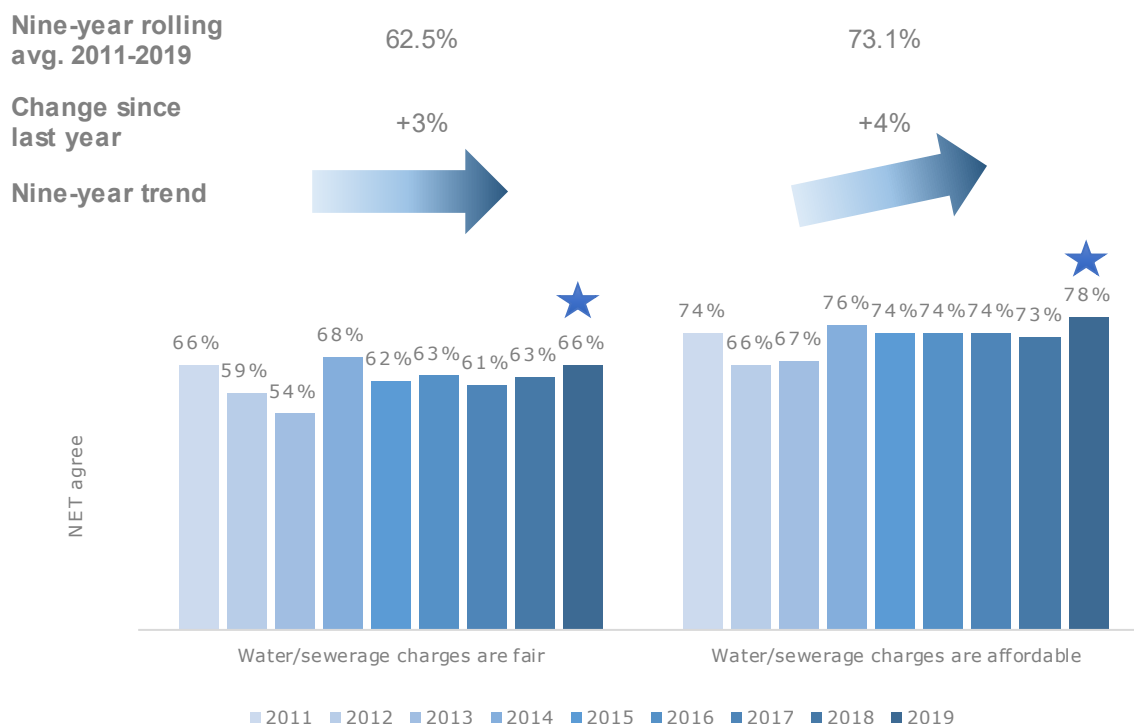
★ Significant difference between 2018 and 2019 data.

Fairness and affordability of charges

Positive perceptions of fairness and affordability of charges for water/sewerage have increased significantly in 2019.

- In 2019, 66% of customers in England and Wales agree that the charges they pay are fair, a significant increase since 2018 (63%).
- More customers agree that their charges are affordable than fair, 78% in England and Wales in 2019 (Figure 5). Ratings for England are higher than in Wales for the first time since 2014 (78% England vs 74% Wales), although this is not a significant difference.

Figure 5: Fairness and affordability of water/sewerage charges



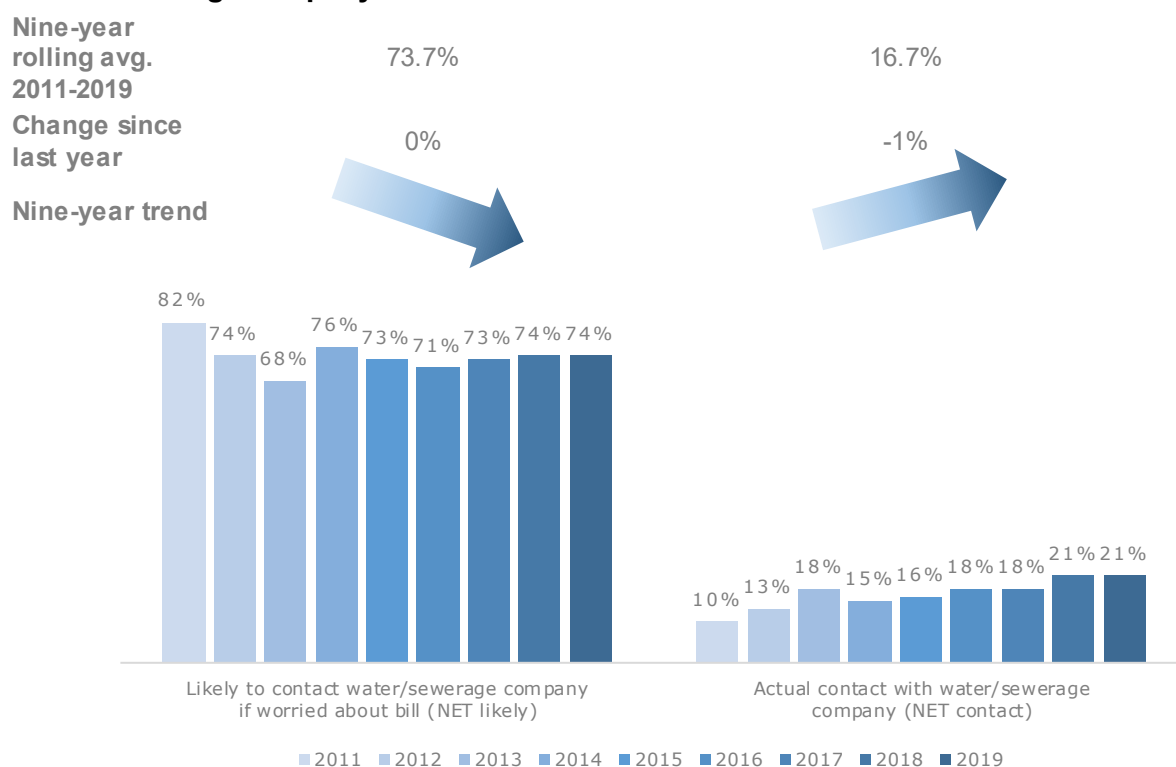
★ Significant difference between 2018 and 2019 data.

Contact with water companies

Over the last nine years, fewer customers say they are likely to contact their water and/or sewerage company if worried about their bill. However, when customers do make contact, for whatever reason, they are increasingly likely to be satisfied.

- Almost three quarters of customers (74%) in England and Wales would be likely to contact their supplier if they had a problem with their bill (Figure 6). However, over the last nine years, likelihood to contact has fallen significantly, from 82% in 2011.
- Around one in five customers (21%) in England and Wales made contact with their water/sewerage company in 2018. The trend has increased over the last nine years but there has been no change since 2018 (Figure 6). The main reason for contact was a billing enquiry.
- 79% of customers in England and Wales are satisfied with contact with their water and/or sewerage company in 2019. Satisfaction with all aspects of contact ranges from 84% to 72% (including ease of contact, quality of information, knowledge/ professionalism, resolution and kept informed); the nine-year trend is one of improvement for all aspects of contact handling in England and Wales.

Figure 6: Likelihood to contact if worried about bill and level of actual contact with water/sewerage company

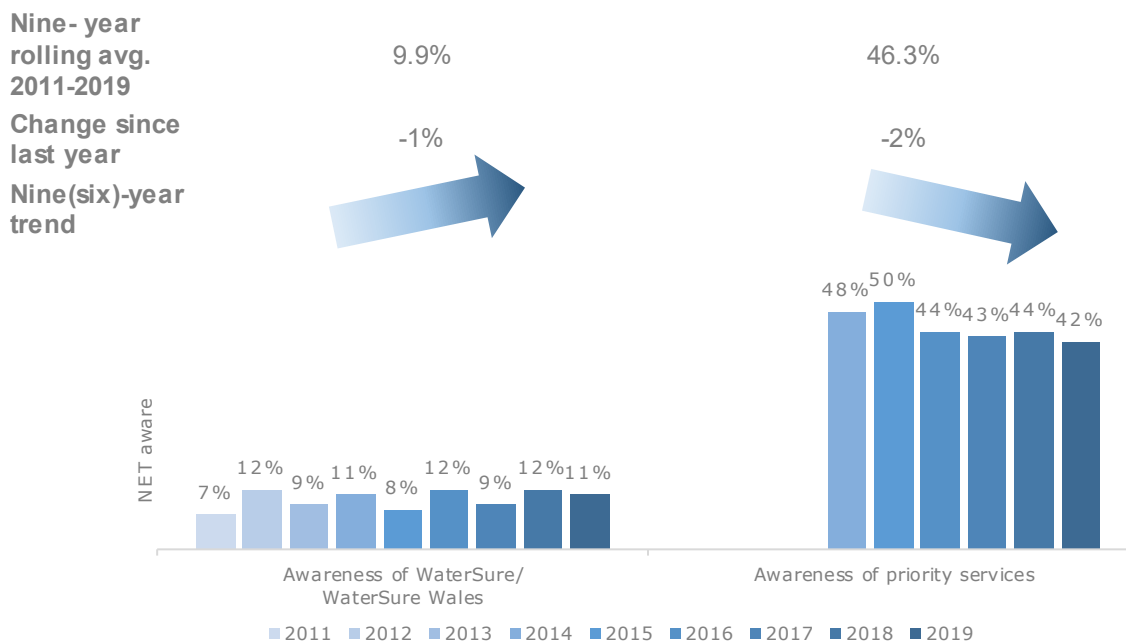


Awareness of WaterSure support tariff⁸ and Priority Services

The nine-year trend shows increasing awareness of WaterSure/WaterSure Wales but the six-year trend is downwards for awareness of Priority Services.

- Awareness of the WaterSure tariff is 11% in England and Wales, a slight decrease since 2018 (12%).
- 42% of customers in England and Wales are aware of Priority Services. This has decreased slightly since 2018 (44%). The six-year trend shows a decrease in awareness.

Figure 7: Awareness of WaterSure and Priority Services⁹



Communication about services, plans and additional services

For the first time, customers were asked how well their water/water and sewerage company communicates with them about its services and plans and the availability of support such as WaterSure and Priority or additional services. They were also asked for the reasons for their reply.

- Across England and Wales, 49% of customers say that the communications from their companies are good. 38% of these say the main reason for having this view was that they had never had a problem with communication.
- On the other hand, 51% of customers say that the communications are poor and 35% say this is because they have never had any communication.

⁸ WaterSure is a system set up to provide a reduction in charges for customers on a low income and whose water is supplied by a meter.

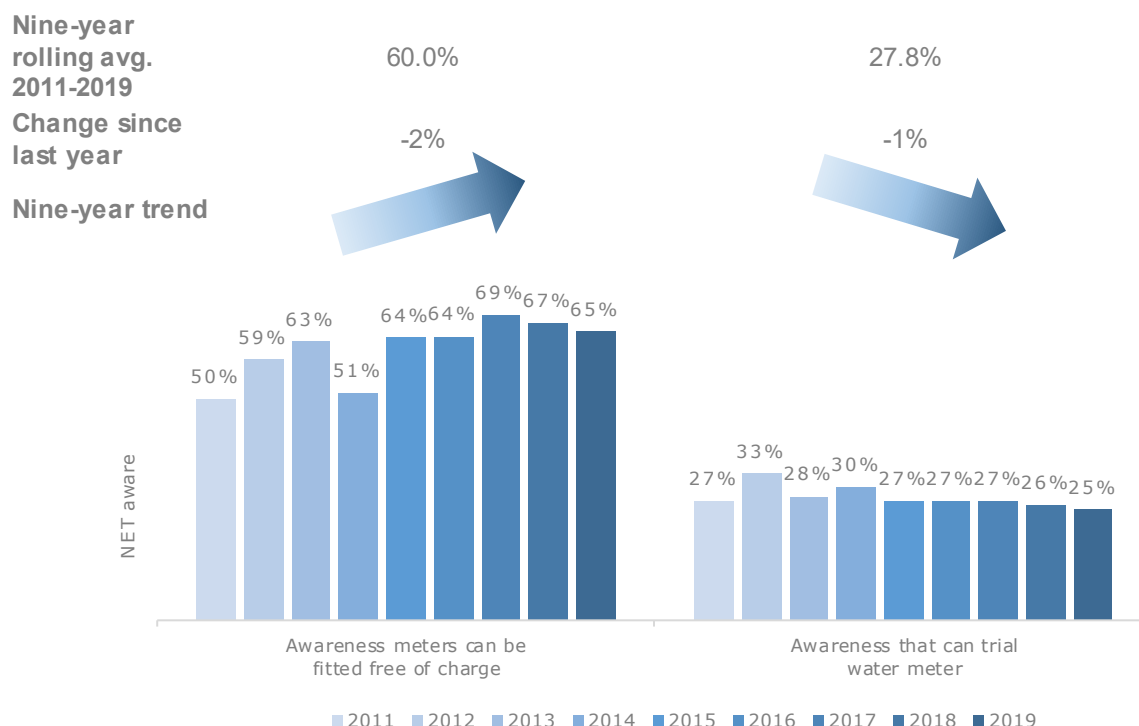
⁹ The trend for awareness of priority services is measured over six years, from 2014 due to a change in question wording

Water meters

Awareness of the free meter scheme has increased since 2011; however, only a minority of customers are aware that a meter can be fitted on a trial basis¹⁰

- Two-thirds of unmetered customers in England and Wales are aware of the free meter scheme (65%), a slight fall since 2018; the nine-year trend shows increasing awareness of the free meter scheme (Figure 8).
- However, only 25% of customers in England and Wales are aware of the 24-month trial period and awareness of this has fallen since 2011.

Figure 8: Awareness meters can be fitted for free and can be trialed



¹⁰ Awareness is measured only in water company areas where the free meter trial scheme has not been discontinued due to universal metering programmes, and only amongst customers from households that do not already have a water meter.

Satisfaction with customer services/overall experience

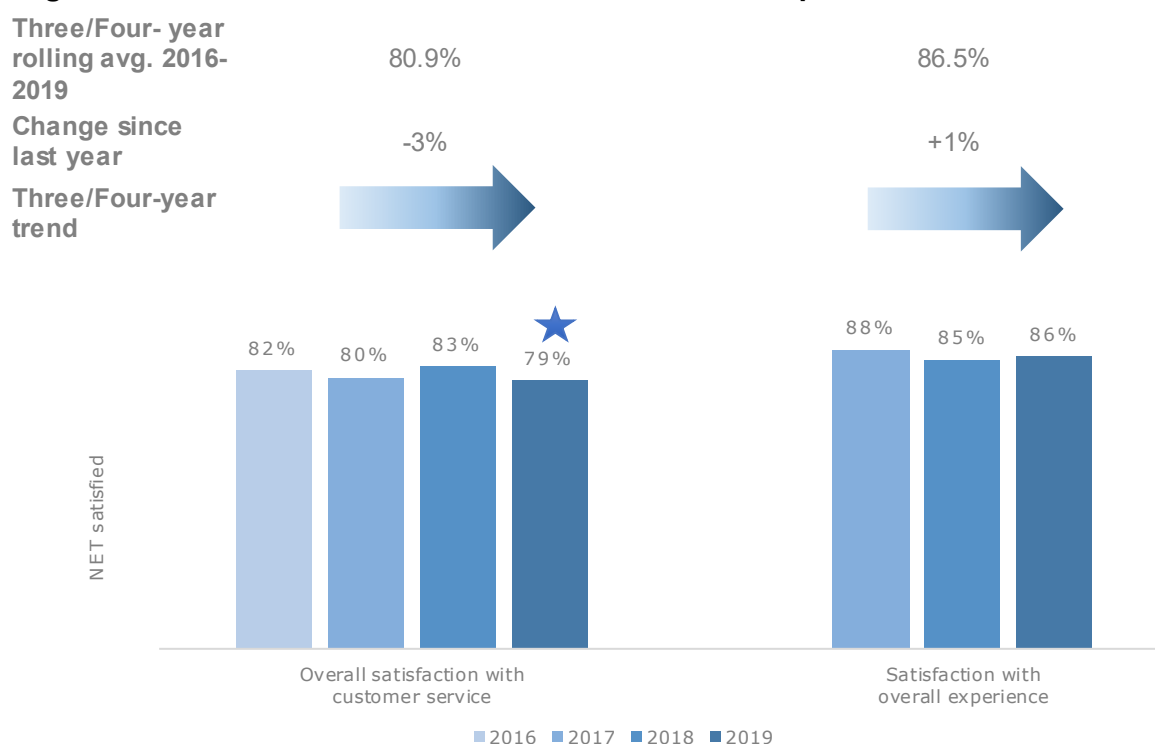
Positive perceptions of overall satisfaction with customer services have decreased significantly in 2019

- When asked to consider customer services more generally, including the frequency and content of bills, meter readings and payment options, 79% of customers in England and Wales are satisfied, a significant decrease since 2018 (83%).
- The main reason for dissatisfaction continues to be the lack of communication/information.

Positive perceptions of overall experience remain stable since the question was introduced in 2017

- When asked to think about their overall experience of water and/or sewerage service, including the provision of services, as well as charges, customer services and billing, 86% of customers in England and Wales are satisfied.

Figure 9: Satisfaction with customer services/overall experience



★ Significant difference between 2018 and 2019 data.

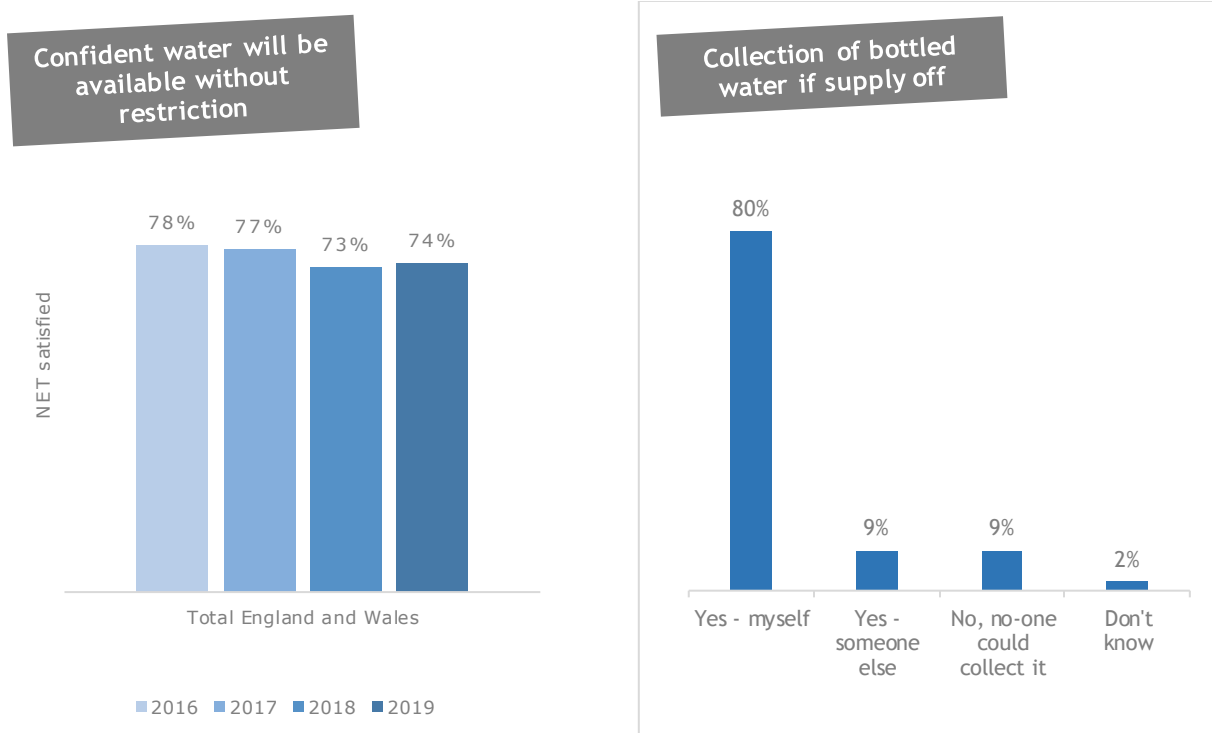
Views on the availability and accessibility of water

Confidence that their water supply will be available without restriction in the longer term has fallen since the question was introduced in 2016

- Three-quarters of customers in England and Wales are confident that in the longer term their water supply will be available without restriction, that is, not subject to hosepipe bans or other restrictions on use (74%), a slight increase since 2018 (73%). (Figure 10).
- Of customers who are confident that the water supply will be available, half say that they have never had a problem with water shortages (50%), while one in seven mentioned that it rains a lot so it is not a real problem (14%).
- Whereas customers who are not confident that the water supply will be available say that there will be less water in the future due to climate change (30%), have already witnessed or thought they would witness restrictions (24%), or mention population growth as a reason for less water (16%).

Most customers would be able to pick up bottled water if their water was off for more than a few hours

- For the first time, respondents were asked about their capacity to collect bottled water if the water supply to their household was disrupted.
- Four-fifths of customers in England and Wales would be able to pick up bottled water from a local water company distribution station if their water was off for more than a few hours (80%), and a further nine percent say someone else in the household could do it. Less than one in ten (9%) say no-one in the household could collect it. (Figure 10).
- When asked in what circumstances, if any, they think they might need help; over half say they could not think of any circumstances where they would need help (55%).
- Poor health or disability are the main reasons given should they need help (housebound due to illness or disability (11%), if health deteriorated (5%), short term acute illness (4%)). Lack of transport would be another situation (6%).



Likelihood to recommend water/sewerage company: Net Promoter Scores (NPS)

Just over two-fifths of customers are promoters, i.e. very likely to recommend their water/sewerage company in 2019.

- Customers were asked hypothetically how likely they would be to recommend their water/water and sewerage company to friends or family. Just over four in ten (41%) are very likely to recommend their supplier (scores of 9 or 10).
- The industry NPS¹¹ is +16, with customers in Wales significantly more likely to score 9 or 10 and be classed as 'promoters' (a net promoter score of +37 compared to +15 in England).
- Scores range from -9 to +38 across WaSCs and from -4 to +62 across WoCs. Only five companies score a negative NPS (Severn Trent, South West, Southern, Affinity South East and South East).

Table 1: NPS by company

WaSC	NPS Score	WoC	NPS Score
Anglian	18	Affinity Central	9
Dŵr Cymru	38	Affinity East	19
Hafren Dyfrdwy	37	Affinity South East	-4
Northumbrian	22	Bournemouth	33
Severn Trent	-6	Bristol	29
South West	-4	Cambridge	17
Southern	-9	Essex & Suffolk	19
Thames	21	Hartlepool	62
United Utilities	33	Portsmouth	35
Wessex	33	South East	-1
Yorkshire	23	South Staffs	24
		SES	7

Key differences in findings between customers in England and Wales

- The key differences when comparing England and Wales, and significant differences in trends are highlighted in the table below. Generally, scores on many measures are higher in Wales than in England with significant year on year differences being shown in Table 2.

Table 2: England and Wales significant differences in 2019

Key measures	England		Wales	
	%/n	9-year trend	%/n	9-year trend
Care about services provided	68%	↔	74%	↑
Level of trust	7.67	↑	7.94	↑
Overall satisfaction with water service	91%	↔	94%	↔
Confidence in longer term water supply ¹²	74%	↓	83%	↔
Net Promoter Score	15	n/a	37	n/a

- This year, there have been some decreases in ratings for Wales vs. 2018 in many areas. For affordability, Wales is now lower than England (which is the first time since 2011). Although many of these drops are not significant for Wales vs. 2018, it suggests a narrowing of the gap between England and Wales.

¹¹ Those giving scores of 0 to 6 are classified as Detractors, 7 to 8 Passives and 9 to 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

¹² Four-year trend.

Methodology

Telephone research was conducted with a random sample of households across England and Wales. Respondents were responsible, either solely or jointly, for paying their household's water bill. Quota controls were set according to the 2011 Census.

Fieldwork took place between 2nd September 2019 and 30th March 2020. This included a pilot survey of 50 customers to review interview length and routing. A total of 6,310 interviews which were an average of 18 minutes and 16 seconds long.

Fieldwork was completed before the effects of the COVID-19 lockdown would have been fully felt by households. Interviewing was ongoing into March 2020, and finished on the 30th March (lockdown started on the evening of the 23rd March 2020). This survey therefore reflects 'business as usual' views. It is possible that some of these views will have been affected by changes in personal circumstances since.

For inclusivity, customers without landlines (i.e. customers who describe themselves as not having a landline or only using their landline for broadband purposes) continue to be represented in the research, with 1,711 interviews achieved in 2019.

At company level, CCW commissioned 200 interviews for each of the 11 WaSCs, and 150 for the 12 WoCs which equates to 4,000 interviews (4010 were achieved). Each water company was given the opportunity to boost interview numbers and nine companies did so:

- Anglian Water (200 additional interviews)
- Bristol Water (150 additional interviews)
- Dŵr Cymru Welsh Water (200 additional interviews)
- Portsmouth Water (150 additional interviews)
- South East Water (200 additional interviews)
- Severn Trent (500 additional interviews)
- Southern Water (200 additional interviews)
- United Utilities (500 additional interviews)
- Yorkshire Water (200 additional interviews)

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

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 Table 3.

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

The findings for each WaSC and WoC are reported here on a question-by-question basis; they are also published on CCW's website¹³ on a company-by-company basis.

¹³ <https://www.ccwater.org.uk/households/company-performance/>

Analysis

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

The total data is weighted in line with the number of household water supply connections for each water company. All total charts show weighted data but give the unweighted base sizes. All individual company data is unweighted.

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

Table 3: Statistical reliability

	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	6310	0.74	1.13	1.23
England	5710	0.78	1.19	1.30
Wales	600	2.40	3.67	4.00
Company sample sizes	700	2.22	3.39	3.70
	400	2.94	4.49	4.90
	350	3.14	4.80	5.24
	300	3.39	5.19	5.66
	200	4.16	6.35	6.93
	150	4.80	7.33	8.00
Metered households	3581	0.98	1.50	1.64
Unmetered households	2625	1.15	1.75	1.91
Sample size 150: Affinity Water Central, Affinity Water East, Affinity Water South East, Bournemouth Water, Cambridge Water, Essex & Suffolk Water, Hartlepool Water, South Staffs Water, SES Water				
Sample size 200: Hafren Dyfrdwy, Northumbrian Water, South West Water, Thames Water, Wessex Water				
Sample size 300: Bristol Water, Portsmouth Water				
Sample size 350: South East Water				
Sample size 400: Anglian Water, Dŵr Cymru (Welsh Water), Southern Water, Yorkshire Water				
Sample size 700: Severn Trent, United Utilities				

Significant differences between England and Wales, and 2019 vs. 2018 data are highlighted on national charts with a star.

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

In 2014, DJS Research commissioned a face-to-face omnibus survey of 1000 water bill-payers with a representative sample for England and Wales in order to identify the proportion of younger bill payers in England and Wales. The survey discovered that only 27% of 18-29-year olds were responsible for paying their water bill. As a result, the age band quotas used for Water Matters were adjusted accordingly and continue to be so.

The SEC classifications used are:

1. Higher managerial, administrative and professional occupations; lower managerial, administrative and professional occupations.
2. Intermediate occupations; small employers and own account workers.
3. Lower supervisory and technical occupations; semi-routine occupations; routine occupations.
4. Never worked and long-term unemployed.
5. Full-time students.

Water Matters has been a company level survey for nine years, and to get full value from this data, trend analysis has been conducted across nine years. Where 'don't know' responses are excluded from reported percentages, the rolling nine-year averages are calculated using the total valid base (which excludes 'don't know' responses or respondents who refused to answer) of weighted data at each time point to properly account for the changes in proportions of respondents answering each question. Where questions are reported with 'don't know' responses (e.g. awareness questions) the rolling nine-year averages are based on the total sample size for the industry, nation or company as appropriate.

For consistency in approach to trend analysis between 2011 and 2019, the nine-year trends are analysed using the Mann-Kendall method (Mann 1945¹⁴, Kendall 1975¹⁵). This statistical technique identifies significant upward or downward trends in the reported proportions for each of the key measures. The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data. The raw data is transformed using the arcsine square root transformation to prevent forecasts from passing the lower (0%) or upper (100%) bounds. The smoothing process then produces a weighted average of the year in question and all years preceding (using a conservative smoothing parameter, $\alpha=0.5$) to smooth any spikes or troughs in the reported proportions. The smoothed data determines whether a longer-term increasing or decreasing trend exists (indicated by trend arrows on the charts) which is determined by using a Mann-Kendall test (Gilbert 1987¹⁶). Nine-year trend analyses are only conducted when data exists for all of the previous nine years and when the question format, routing and text has remained the same over this entire period.

Cluster analysis

Cluster analysis was carried out for the first time in 2013 and has been repeated every year since then. Cluster analysis uses statistical techniques to segment customers into different groups depending on how they respond to the following questions:

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

The proportions for this year are as follows:

- Cluster 1 – "Very Satisfied" – 56% 2019 compared to 51% in 2018¹⁷. This cluster is very satisfied with value for money, services, affordability and fairness. The largest cluster by far.

¹⁴Mann, H.B. 1945. Non-parametric tests against trend, *Econometrica* 13:163-171.

¹⁵Kendall, M.G. 1975. *Rank Correlation Methods*, 4th edition, Charles Griffin, London.

¹⁶Gilbert, Richard O. *Statistical Methods for Environmental Pollution Monitoring*. United States: N. p., 1987

¹⁷ Although the increase appears significant from 2018; because this is a derived score, significance testing isn't appropriate here.

- Cluster 2 – “Neutral” – 30% 2019 compared to 22% in 2018. These customers feel neutral to satisfied with value for money, services, affordability and fairness. The second largest cluster and higher than in 2018.
- Cluster 3 – “Unfair” – 12% 2019 compared to 13% in 2018. Neutral or satisfied on all value for money, services and affordability, but feel their charges are unfair.
- Cluster 4 – “Dissatisfied” – 6% 2019 compared to 9% in 2018. This cluster is dissatisfied with value for money, affordability and fairness, whereas ratings for service range from satisfied to dissatisfied.

Changes in 2019

There are few major changes to the survey this year, however one key question has been asked differently:

- The affordability questions for WoCs without a septic tank have been combined into one this year, to ask about affordability of water and sewerage as a whole. Previously the question was asked in 3 parts: about water, then sewerage and finally about total charges.
- In previous years the vast majority of people gave the same response across all 3 measures; and if they did not then two-thirds of the time the water bill and the overall/combined rating matched, which shows that water was much more on their mind than sewerage when answering for overall affordability. Therefore, any statistical changes will not be because of this change.

A couple of new questions have been included concerning communication regarding services and plans – rating how well companies communicate and the reasons why:

- How well does your water company communicate with you about its services and plans, and the availability of things like WaterSure and Priority or additional services on a scale from 1-5, where 1 indicates their communication is very good and 5 indicates that it is very poor
- Why do you say that?

And two questions surrounding the ability to pick up bottled water from a local distribution station in the event of supply issues:

- In the unlikely event that your water supply was off for more than few hours, is there someone in your household who would be able to pick up bottled water from a local water company distribution centre?
- In what circumstances, if any, do you think you might need help in collecting bottled water?

Interpreting the nine-year trend tables in the chapters which follow




Due to rounding, summed percentages may be $\pm 1\%$ different from summing individual proportions. For example, in Figure 22, the year on year difference for England is shown as 0%. Actual figures are 73.8% in 2018 (so shown as 74%) and 73.4% in 2019 (so shown as 73%). Although the difference could be shown as -1%, it is actually only 0.4%.

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

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 know' responses 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' answers; in nearly all cases the numbers of 'don't know' responses 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 where they are greater than 5% only and are based on all responses.

Significant differences at the 95% confidence interval are shown in the charts with coloured arrows/text:

-  in green indicates a significant upward nine-year trend, or where the nine-year average for a specific company is significantly higher than the nine-year average for aggregate WaSCs or WoCs, or where there has been a significant increase since 2019.
-  in red indicates a significant downward nine-year trend, or where the nine-year average for a company is significantly lower than the aggregate for all WaSCs or WoCs, or where there has been a significant fall since 2019.
-  in black indicates a flat trend where there is no significant change over nine years, or no difference in the nine-year company average to the aggregate average for all WaSCs or WoCs, or no significant difference between 2018 and 2019 findings.

Chapter 1: Care and trust

This part of the data report covers customer perceptions 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.

1.1 Care about service provision

Customers were asked to what extent they agreed or disagreed that their water company cares about the service it provides to its customers. Nine-year trends for England and Wales, for England and for Wales are shown in Figure 10, with trends for WaSCs and for WoCs in Table 4 and Table 5, which follow.

Figure 10: Care about service provision

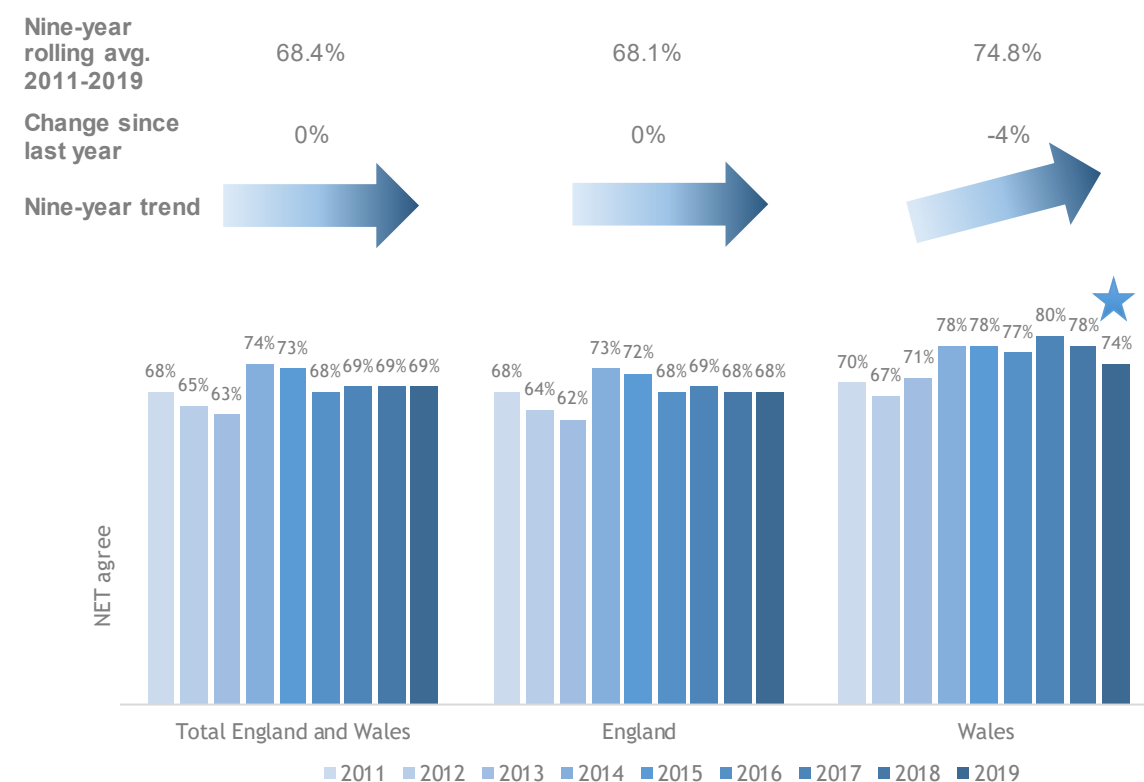


Table 4: Care about service provision – WaSCs

Water companies care about service provided to customers	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	68.4%	<p>68% 65% 63% 74% 73% 68% 69% 69% 69%</p> <p>Year</p>	↔	n/a	0%
Total WaSCs (2019 base sample: 4003)	68.9%	<p>68% 65% 63% 74% 73% 70% 69% 69% 69%</p> <p>Year</p>	↔	69% ¹⁸	0%
Anglian Water (2019 base sample: 400)	69.1%	<p>66% 67% 59% 75% 77% 68% 73% 69% 69%</p> <p>Year</p>	↔	↔	0%
Dŵr Cymru Welsh Water (2019 base sample: 400)	74.7%	<p>70% 67% 71% 78% 78% 76% 79% 79% 75%</p> <p>Year</p>	↑	↑	-4%
Hafren Dyfrdwy (2019 base sample: 200)	70.1% ¹⁹	<p>72% 69%</p> <p>Year</p>	n/a	↔	-3%
Northumbrian Water (2019 base sample: 200)	74.6%	<p>75% 70% 72% 78% 77% 79% 73% 75% 71%</p> <p>Year</p>	↔	↔	-4%
Severn Trent (2019 base sample: 701)	70.3%	<p>71% 61% 65% 75% 72% 74% 69% 72% 74%</p> <p>Year</p>	↔	↔	+1%
South West Water (2019 base sample: 200)	62.7%	<p>62% 57% 61% 67% 66% 66% 62% 62% 62%</p> <p>Year</p>	↔	↓	0%
Southern Water (2019 base sample: 401)	63.5%	<p>58% 69% 58% 68% 68% 67% 61% 62% 62%</p> <p>Year</p>	↔	↓	0%

¹⁸ Average score for WaSCs for 2019. Arrows in this column are compared to this score.

¹⁹ Hafren rolling average is based on 2018 and 2019 data only. This is true for all tables.

Thames Water (2019 base sample: 200)	62.5%	<p>68% 66% 65% 66% 67% 61% 61% 60% 60%</p> <p>Year</p>	↓	↓	0%
United Utilities (2019 base sample: 700)	69.8%	<p>67% 64% 65% 78% 75% 69% 69% 70% 70%</p> <p>Year</p>	↔	↔	0%
Wessex Water (2019 base sample: 200)	73.8%	<p>72% 78% 66% 78% 77% 74% 74% 70% 75%</p> <p>Year</p>	↔	↑	+5%
Yorkshire Water (2019 base sample: 401)	72.1%	<p>68% 63% 66% 80% 75% 72% 74% 76% 75%</p> <p>Year</p>	↑	↑	0%

Table 5: Care about service provision – WoCs

Water companies care about service provided to customers	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	68.4%	<p>68% 65% 63% 74% 73% 68% 69% 69% 69%</p> <p>Year</p>	↔	n/a	0%
Total WoCs (2019 base sample: 2307)	67.0%	<p>67% 62% 61% 72% 71% 65% 71% 66% 67%</p> <p>Year</p>	↔	67% ²⁰	+1%
Affinity Water Central (2019 base sample: 150)	61.3%	<p>65% 54% 49% 68% 66% 60% 66% 61% 65%</p> <p>Year</p>	↔	↔	+4%
Affinity Water East (2019 base sample: 151)	66.7%	<p>75% 59% 64% 71% 68% 62% 67% 63% 71%</p> <p>Year</p>	↔	↔	+8%
Affinity Water South East (2019 base sample: 151)	64.8%	<p>66% 65% 53% 72% 66% 64% 68% 61% 67%</p> <p>Year</p>	↔	↔	+6%

²⁰ Average score for WoCs for 2019. Arrows in this column are compared to this score.

Bournemouth Water (2019 base sample: 152)	73.1%	<p>68% 67% 66% 86% 74% 74% 80% 71% 71%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	0%
Bristol Water (2019 base sample: 300)	75.3%	<p>74% 77% 72% 77% 77% 65% 81% 74% 82%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+8%
Cambridge Water (2019 base sample: 150)	73.4%	<p>77% 70% 74% 85% 77% 72% 65% 74% 68%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-7%
Essex & Suffolk Water (2019 base sample: 150)	67.0%	<p>67% 66% 68% 67% 66% 68% 67% 69% 64%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-5%
Hartlepool Water (2019 base sample: 150)	80.1%	<p>82% 76% 78% 86% 84% 76% 78% 83% 78%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	-5%
Portsmouth Water (2019 base sample: 301)	71.0%	<p>71% 59% 71% 82% 73% 74% 68% 74% 67%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-8%
South East Water (2019 base sample: 350)	63.6%	<p>64% 62% 57% 69% 70% 59% 72% 60% 60%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	0%
South Staffs Water (2019 base sample: 152)	69.9%	<p>66% 64% 67% 72% 81% 62% 80% 68% 69%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+1%
SES Water (2019 base sample: 150)	66.7%	<p>65% 62% 63% 77% 72% 68% 66% 61% 67%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+7%

1.2 Trust in water/sewerage companies

Customers were asked to what extent they trust their water company on a scale of 1 to 10 with 1 being 'do not trust them at all' and 10 being 'trust them completely'. National level trends are shown in Figure 11 with trends for WaSCs and for WoCs in Table 6 and Table 7, which follow.

Figure 11: Trust in water/sewerage companies

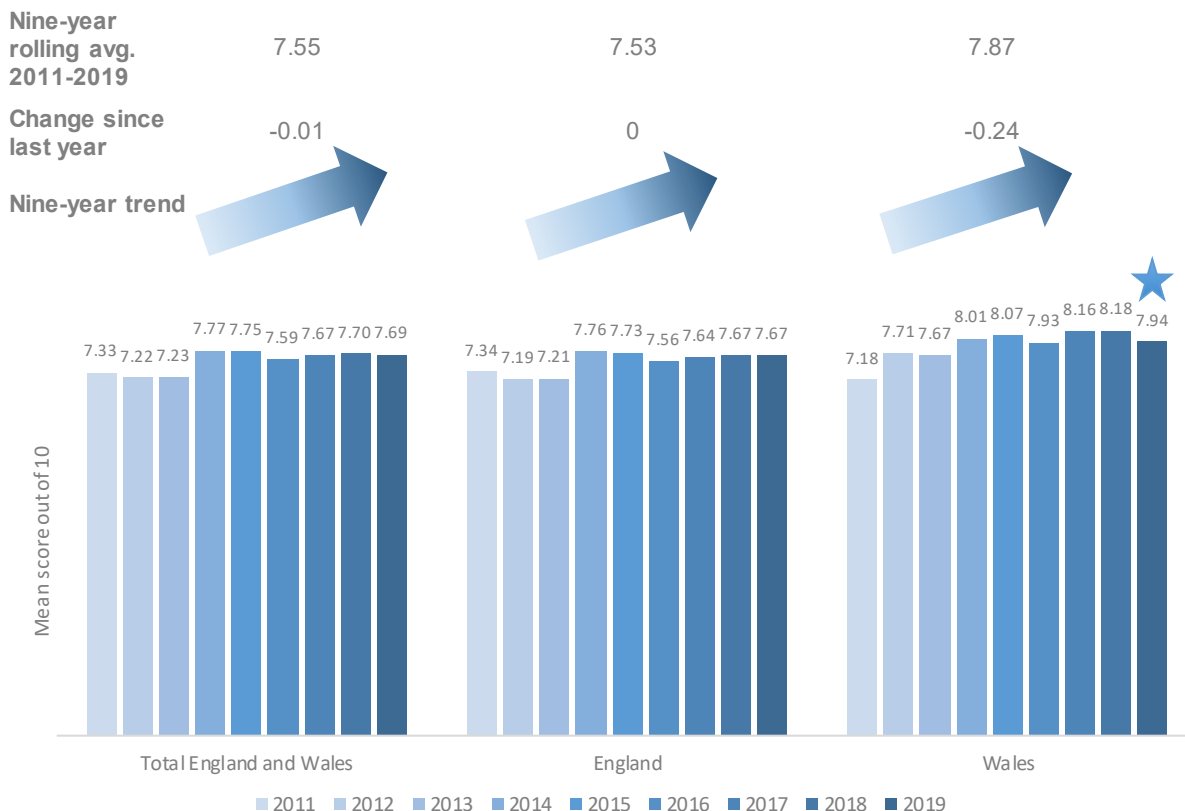



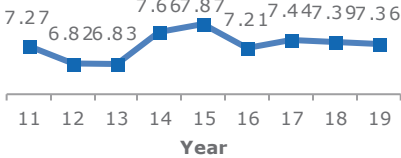
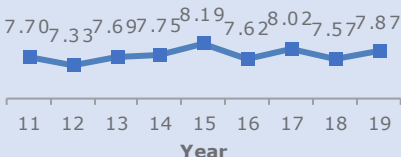

Table 6: Trust in water/sewerage companies – WaSCs

Level of trust in water companies	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	7.55		↑	n/a	-0.01
Total WaSCs (2019 base sample: 4003)	7.55		↑	7.67	-0.03
Anglian Water (2019 base sample: 400)	7.61		↑	↔	-0.03

Dŵr Cymru Welsh Water (2019 base sample: 400)	7.87		↑	↑	-0.25
Hafren Dyfrdwy (2019 base sample: 200)	7.87		n/a	↔	-0.19
Northumbrian Water (2019 base sample: 200)	7.86		↔	↑	0.00
Severn Trent (2019 base sample: 701)	7.62		↑	↔	-0.05
South West Water (2019 base sample: 200)	7.15		↑	↔	+0.37
Southern Water (2019 base sample: 401)	7.20		↑	↓	+0.25
Thames Water (2019 base sample: 200)	7.25		↔	↓	-0.54
United Utilities (2019 base sample: 700)	7.57		↑	↔	+0.20
Wessex Water (2019 base sample: 200)	7.83		↑	↑	+0.12
Yorkshire Water (2019 base sample: 401)	7.75		↑	↑	+0.12

Table 7: Trust in water companies – WoCs

Level of trust in water companies	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	7.55	<p>7.33 7.22 7.23 7.77 7.75 7.59 7.67 7.07 7.69</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	n/a	-0.01
Total WoCs (2019 base sample: 2307)	7.54	<p>7.32 7.14 7.28 7.78 7.83 7.46 7.69 7.61 7.74</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	7.74	+0.13
Affinity Water Central (2019 base sample: 150)	7.39	<p>7.02 6.90 7.11 7.74 7.68 7.46 7.39 7.41 7.81</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+0.39
Affinity Water East (2019 base sample: 151)	7.52	<p>7.56 7.13 7.38 7.85 7.22 7.54 7.83 7.59 7.59</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	0.00
Affinity Water South East (2019 base sample: 151)	7.31	<p>7.11 7.36 6.83 7.46 7.54 7.34 7.31 7.59 7.30</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	-0.29
Bournemouth Water (2019 base sample: 152)	7.82	<p>7.46 7.44 7.47 8.03 7.90 7.95 8.01 8.01 8.11</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↑	+0.09
Bristol Water (2019 base sample: 300)	7.72	<p>7.31 7.37 7.66 7.73 7.81 7.32 8.05 8.12 8.15</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↑	+0.03
Cambridge Water (2019 base sample: 150)	7.81	<p>7.49 7.78 7.47 8.19 7.71 7.63 7.90 8.11 7.99</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-0.12
Essex & Suffolk Water (2019 base sample: 150)	7.55	<p>7.36 7.43 7.38 7.63 7.93 7.48 7.55 7.59 7.59</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+0.01
Hartlepool Water (2019 base sample: 150)	8.20	<p>8.19 7.77 7.89 8.55 8.33 8.02 8.23 8.26 8.57</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+0.31

Portsmouth Water (2019 base sample: 301)	7.74		↑	↔	+0.07
South East Water (2019 base sample: 350)	7.31		↔	↓	-0.04
South Staffs Water (2019 base sample: 152)	7.75		↔	↔	+0.30
SES Water (2019 base sample: 150)	7.44		↑	↔	+0.05

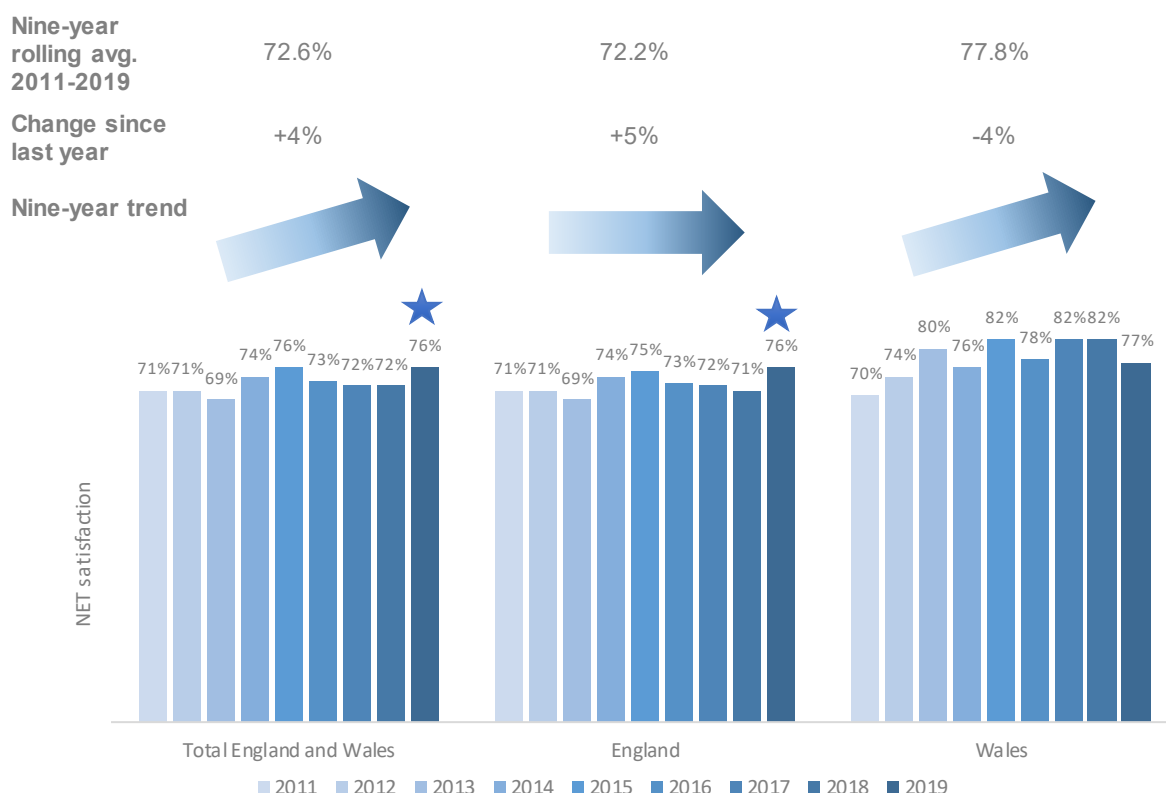
Chapter 2: Value for money, fairness and affordability

This chapter presents views on the charges paid for water and sewerage services. Topics include fairness, affordability and value for money.

2.1 Value for money of water services

Customers were asked how far they agreed that the water services they receive represent value for money. National views are shown in Figure 12 below, followed by Table 8 and Table 9, which present customers' views for each WaSC and for each WoC respectively.

Figure 12: Satisfaction with value for money of water services



★ Significant difference between 2018 and 2019 data.

Table 8: Satisfaction with value for money of water services - WaSCs

Satisfaction with value for money of water services	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	72.6%		↑	n/a	+4%
Total WaSCs (2019 base sample: 4003)	72.5%		↑	76%	+4%

Anglian Water (2019 base sample: 400)	73.2%	<p>71% 69% 71% 74% 77% 73% 79% 72% 74%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+1%
Dŵr Cymru Welsh Water (2019 base sample: 400)	77.9%	<p>69% 74% 81% 75% 82% 78% 82% 82% 77%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-5%
Hafren Dyfrdwy (2019 base sample: 200)	76.5%	<p>76% 77%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	0%
Northumbrian Water (2019 base sample: 200)	78.2%	<p>83% 74% 78% 77% 77% 84% 78% 75% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+4%
Severn Trent (2019 base sample: 701)	74.6%	<p>69% 71% 72% 77% 75% 78% 72% 78% 78%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+1%
South West Water (2019 base sample: 200)	54.9%	<p>35% 53% 51% 56% 58% 65% 54% 56% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	+9%
Southern Water (2019 base sample: 401)	66.8%	<p>67% 68% 68% 70% 66% 72% 61% 62% 67%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↓	+5%
Thames Water (2019 base sample: 200)	70.4%	<p>72% 79% 63% 70% 74% 70% 66% 65% 75%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+10%
United Utilities (2019 base sample: 700)	70.6%	<p>68% 66% 64% 75% 73% 68% 73% 71% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+5%
Wessex Water (2019 base sample: 200)	74.4%	<p>64% 73% 74% 78% 76% 75% 76% 75% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+4%
Yorkshire Water (2019 base sample: 401)	77.3%	<p>80% 71% 73% 78% 82% 79% 76% 77% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+1%

Table 9: Satisfaction with value for money of water services – WoCs

Satisfaction with value for money of water services	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year																				
Industry (2019 base sample: 6310)	72.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>71%</td><td>71%</td><td>69%</td><td>74%</td><td>76%</td><td>73%</td><td>72%</td><td>72%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	71%	71%	69%	74%	76%	73%	72%	72%	76%	↑	n/a	+4%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	71%	71%	69%	74%	76%	73%	72%	72%	76%																
Total WoCs (2019 base sample: 2307)	72.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>73%</td><td>69%</td><td>70%</td><td>75%</td><td>79%</td><td>70%</td><td>72%</td><td>70%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	73%	69%	70%	75%	79%	70%	72%	70%	76%	↔	76%	+6%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	73%	69%	70%	75%	79%	70%	72%	70%	76%																
Affinity Water Central (2019 base sample: 150)	69.7%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>74%</td><td>64%</td><td>62%</td><td>74%</td><td>78%</td><td>69%</td><td>63%</td><td>65%</td><td>77%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	74%	64%	62%	74%	78%	69%	63%	65%	77%	↔	↔	+13%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	74%	64%	62%	74%	78%	69%	63%	65%	77%																
Affinity Water East (2019 base sample: 151)	72.2%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>75%</td><td>71%</td><td>77%</td><td>78%</td><td>71%</td><td>67%</td><td>71%</td><td>64%</td><td>75%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	75%	71%	77%	78%	71%	67%	71%	64%	75%	↔	↔	+11%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	75%	71%	77%	78%	71%	67%	71%	64%	75%																
Affinity Water South East (2019 base sample: 151)	69.8%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>74%</td><td>70%</td><td>63%</td><td>72%</td><td>72%</td><td>72%</td><td>66%</td><td>71%</td><td>70%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	74%	70%	63%	72%	72%	72%	66%	71%	70%	↔	↔	-1%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	74%	70%	63%	72%	72%	72%	66%	71%	70%																
Bournemouth Water (2019 base sample: 152)	79.0%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>69%</td><td>71%</td><td>79%</td><td>81%</td><td>78%</td><td>84%</td><td>78%</td><td>85%</td><td>85%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	69%	71%	79%	81%	78%	84%	78%	85%	85%	↑	↑	0%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	69%	71%	79%	81%	78%	84%	78%	85%	85%																
Bristol Water (2019 base sample: 300)	73.8%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>76%</td><td>71%</td><td>72%</td><td>70%</td><td>82%</td><td>62%</td><td>77%</td><td>75%</td><td>80%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	76%	71%	72%	70%	82%	62%	77%	75%	80%	↔	↔	+5%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	76%	71%	72%	70%	82%	62%	77%	75%	80%																
Cambridge Water (2019 base sample: 150)	76.4%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>78%</td><td>79%</td><td>75%</td><td>80%</td><td>81%</td><td>75%</td><td>74%</td><td>68%</td><td>78%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	78%	79%	75%	80%	81%	75%	74%	68%	78%	↔	↔	+10%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	78%	79%	75%	80%	81%	75%	74%	68%	78%																
Essex & Suffolk Water (2019 base sample: 150)	71.2%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>73%</td><td>66%</td><td>72%</td><td>75%</td><td>70%</td><td>67%</td><td>71%</td><td>71%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	73%	66%	72%	75%	70%	67%	71%	71%	76%	↔	↔	+4%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	73%	66%	72%	75%	70%	67%	71%	71%	76%																
Hartlepool Water (2019 base sample: 150)	82.1%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Satisfaction (%)</td><td>80%</td><td>80%</td><td>80%</td><td>85%</td><td>88%</td><td>78%</td><td>83%</td><td>84%</td><td>82%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Satisfaction (%)	80%	80%	80%	85%	88%	78%	83%	84%	82%	↔	↔	-3%
Year	11	12	13	14	15	16	17	18	19																
Satisfaction (%)	80%	80%	80%	85%	88%	78%	83%	84%	82%																

Portsmouth Water (2019 base sample: 301)	79.6%	<table><tr><th>Year</th><th>Value for Money (%)</th></tr><tr><td>11</td><td>81%</td></tr><tr><td>12</td><td>75%</td></tr><tr><td>13</td><td>88%</td></tr><tr><td>14</td><td>79%</td></tr><tr><td>15</td><td>81%</td></tr><tr><td>16</td><td>79%</td></tr><tr><td>17</td><td>79%</td></tr><tr><td>18</td><td>77%</td></tr><tr><td>19</td><td>77%</td></tr></table>	Year	Value for Money (%)	11	81%	12	75%	13	88%	14	79%	15	81%	16	79%	17	79%	18	77%	19	77%	↔	↔	0%
Year	Value for Money (%)																								
11	81%																								
12	75%																								
13	88%																								
14	79%																								
15	81%																								
16	79%																								
17	79%																								
18	77%																								
19	77%																								
South East Water (2019 base sample: 350)	71.0%	<table><tr><th>Year</th><th>Value for Money (%)</th></tr><tr><td>11</td><td>69%</td></tr><tr><td>12</td><td>71%</td></tr><tr><td>13</td><td>64%</td></tr><tr><td>14</td><td>72%</td></tr><tr><td>15</td><td>83%</td></tr><tr><td>16</td><td>67%</td></tr><tr><td>17</td><td>74%</td></tr><tr><td>18</td><td>69%</td></tr><tr><td>19</td><td>70%</td></tr></table>	Year	Value for Money (%)	11	69%	12	71%	13	64%	14	72%	15	83%	16	67%	17	74%	18	69%	19	70%	↔	↔	+1%
Year	Value for Money (%)																								
11	69%																								
12	71%																								
13	64%																								
14	72%																								
15	83%																								
16	67%																								
17	74%																								
18	69%																								
19	70%																								
South Staffs Water (2019 base sample: 152)	75.1%	<table><tr><th>Year</th><th>Value for Money (%)</th></tr><tr><td>11</td><td>71%</td></tr><tr><td>12</td><td>70%</td></tr><tr><td>13</td><td>74%</td></tr><tr><td>14</td><td>77%</td></tr><tr><td>15</td><td>85%</td></tr><tr><td>16</td><td>74%</td></tr><tr><td>17</td><td>77%</td></tr><tr><td>18</td><td>72%</td></tr><tr><td>19</td><td>76%</td></tr></table>	Year	Value for Money (%)	11	71%	12	70%	13	74%	14	77%	15	85%	16	74%	17	77%	18	72%	19	76%	↑	↔	+4%
Year	Value for Money (%)																								
11	71%																								
12	70%																								
13	74%																								
14	77%																								
15	85%																								
16	74%																								
17	77%																								
18	72%																								
19	76%																								
SES Water (2019 base sample: 150)	72.6%	<table><tr><th>Year</th><th>Value for Money (%)</th></tr><tr><td>11</td><td>77%</td></tr><tr><td>12</td><td>80%</td></tr><tr><td>13</td><td>67%</td></tr><tr><td>14</td><td>73%</td></tr><tr><td>15</td><td>74%</td></tr><tr><td>16</td><td>71%</td></tr><tr><td>17</td><td>69%</td></tr><tr><td>18</td><td>67%</td></tr><tr><td>19</td><td>75%</td></tr></table>	Year	Value for Money (%)	11	77%	12	80%	13	67%	14	73%	15	74%	16	71%	17	69%	18	67%	19	75%	↓	↔	+8%
Year	Value for Money (%)																								
11	77%																								
12	80%																								
13	67%																								
14	73%																								
15	74%																								
16	71%																								
17	69%																								
18	67%																								
19	75%																								

2.2 Value for money of sewerage services

Customers were asked how far they agreed that the sewerage services they receive are value for money. National views are shown in Figure 13 below, followed by

Table 10 and Table 11, which present customer views by each WaSC and WoC respectively.

Figure 13: Satisfaction with value for money of sewerage services

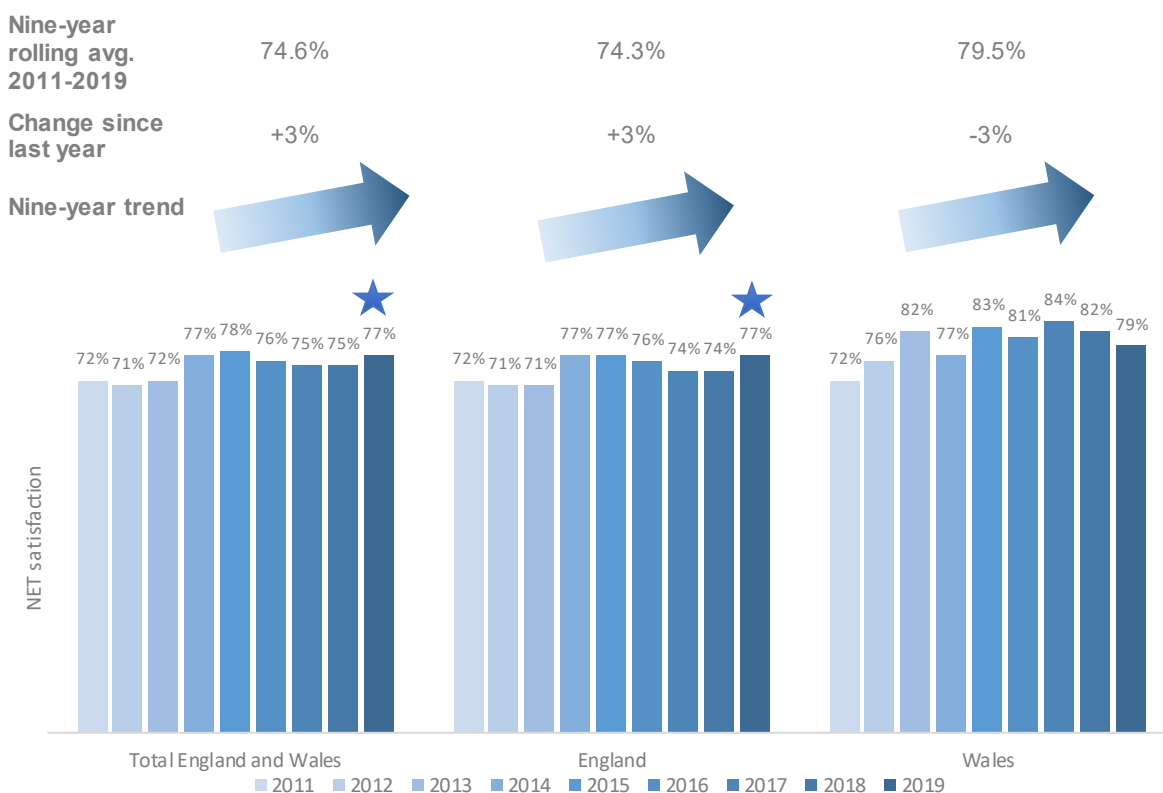


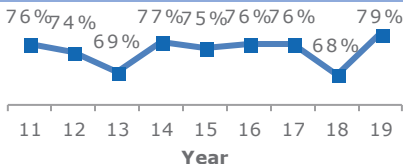
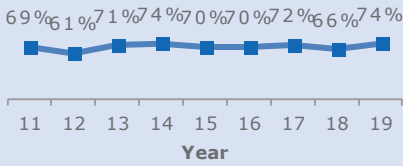
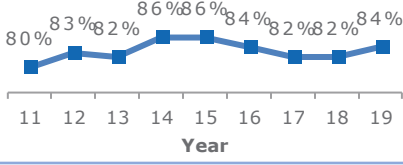
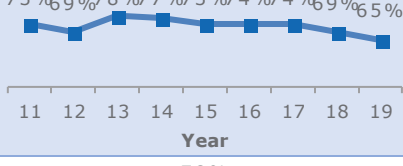
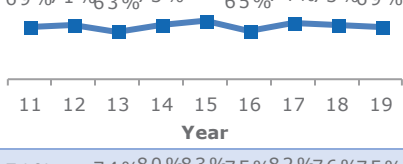
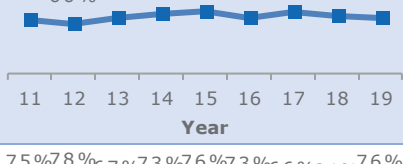
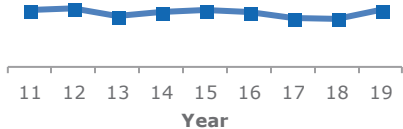
Table 10: Satisfaction with value for money of sewerage services – WaSCs

Satisfaction with value for money of sewerage services	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year																				
Industry (2019 base sample: 6310)	74.6%	<table><caption>Industry Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>72%</td><td>71%</td><td>72%</td><td>77%</td><td>78%</td><td>76%</td><td>75%</td><td>75%</td><td>77%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	72%	71%	72%	77%	78%	76%	75%	75%	77%	↑	n/a	+3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	72%	71%	72%	77%	78%	76%	75%	75%	77%																
Total WaSCs (2019 base sample: 4003)	75.1%	<table><caption>Total WaSCs Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>72%</td><td>72%</td><td>72%</td><td>77%</td><td>78%</td><td>77%</td><td>75%</td><td>75%</td><td>78%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	72%	72%	72%	77%	78%	77%	75%	75%	78%	↑	78%	+3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	72%	72%	72%	77%	78%	77%	75%	75%	78%																
Anglian Water (2019 base sample: 400)	74.6%	<table><caption>Anglian Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>72%</td><td>69%</td><td>72%</td><td>76%</td><td>80%</td><td>76%</td><td>78%</td><td>74%</td><td>75%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	72%	69%	72%	76%	80%	76%	78%	74%	75%	↔	↔	1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	72%	69%	72%	76%	80%	76%	78%	74%	75%																
Dŵr Cymru Welsh Water (2019 base sample: 400)	79.6%	<table><caption>Dŵr Cymru Welsh Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>72%</td><td>77%</td><td>83%</td><td>76%</td><td>83%</td><td>81%</td><td>84%</td><td>83%</td><td>79%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	72%	77%	83%	76%	83%	81%	84%	83%	79%	↑	↔	-4%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	72%	77%	83%	76%	83%	81%	84%	83%	79%																
Hafren Dyfrdwy (2019 base sample: 200)	78.6%	<table><caption>Hafren Dyfrdwy Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>76%</td><td>81%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)								76%	81%	n/a	↔	+6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)								76%	81%																
Northumbrian Water (2019 base sample: 200)	80.5%	<table><caption>Northumbrian Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>84%</td><td>77%</td><td>80%</td><td>80%</td><td>79%</td><td>84%</td><td>78%</td><td>78%</td><td>84%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	84%	77%	80%	80%	79%	84%	78%	78%	84%	↔	↑	+6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	84%	77%	80%	80%	79%	84%	78%	78%	84%																
Severn Trent (2019 base sample: 701)	76.4%	<table><caption>Severn Trent Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>68%</td><td>73%</td><td>74%</td><td>79%</td><td>79%</td><td>80%</td><td>75%</td><td>79%</td><td>80%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	68%	73%	74%	79%	79%	80%	75%	79%	80%	↑	↔	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	68%	73%	74%	79%	79%	80%	75%	79%	80%																
South West Water (2019 base sample: 200)	55.3%	<table><caption>South West Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>39%</td><td>52%</td><td>54%</td><td>53%</td><td>61%</td><td>60%</td><td>58%</td><td>57%</td><td>66%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	39%	52%	54%	53%	61%	60%	58%	57%	66%	↑	↓	+9%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	39%	52%	54%	53%	61%	60%	58%	57%	66%																
Southern Water (2019 base sample: 401)	70.3%	<table><caption>Southern Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>73%</td><td>68%</td><td>74%</td><td>72%</td><td>69%</td><td>73%</td><td>68%</td><td>63%</td><td>74%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	73%	68%	74%	72%	69%	73%	68%	63%	74%	↔	↔	+11%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	73%	68%	74%	72%	69%	73%	68%	63%	74%																
Thames Water (2019 base sample: 200)	73.6%	<table><caption>Thames Water Satisfaction Data (2011-2019)</caption><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>73%</td><td>78%</td><td>67%</td><td>76%</td><td>76%</td><td>78%</td><td>69%</td><td>70%</td><td>75%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	73%	78%	67%	76%	76%	78%	69%	70%	75%	↔	↔	+6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	73%	78%	67%	76%	76%	78%	69%	70%	75%																

United Utilities (2019 base sample: 700)	74.6%	<p>71% 76% 78% 78% 80% 72% 77% 80% 79%</p> <p>Year</p>	↑	↔	-1%
Wessex Water (2019 base sample: 200)	77.4%	<p>68% 75% 73% 79% 81% 80% 78% 79% 83%</p> <p>Year</p>	↑	↑	+4%
Yorkshire Water (2019 base sample: 401)	79.1%	<p>82% 70% 75% 82% 83% 82% 79% 79% 80%</p> <p>Year</p>	↔	↔	+1%

Table 11: Satisfaction with value for money of sewerage services – WoCs

Satisfaction with value for money of sewerage services	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	74.6%	<p>72% 71% 72% 77% 78% 76% 75% 75% 77%</p> <p>Year</p>	↑	n/a	+3%
Total WoCs (2019 base sample: 2307)	72.6%	<p>72% 69% 70% 75% 76% 72% 73% 72% 75%</p> <p>Year</p>	↑	75%	+3%
Affinity Water Central (2019 base sample: 150)	72.3%	<p>72% 70% 71% 75% 74% 75% 66% 71% 78%</p> <p>Year</p>	↔	↔	+7%
Affinity Water East (2019 base sample: 151)	72.8%	<p>75% 69% 70% 82% 70% 70% 66% 76% 75%</p> <p>Year</p>	↔	↔	-1%
Affinity Water South East (2019 base sample: 151)	67.2%	<p>74% 73% 58% 70% 67% 70% 61% 65% 67%</p> <p>Year</p>	↓	↓	+2%
Bournemouth Water (2019 base sample: 152)	75.7%	<p>69% 63% 67% 81% 67% 81% 79% 84% 83%</p> <p>Year</p>	↑	↑	-1%
Bristol Water (2019 base sample: 300)	75.4%	<p>78% 68% 76% 70% 81% 63% 82% 76% 83%</p> <p>Year</p>	↔	↑	+8%

Cambridge Water (2019 base sample: 150)	74.5%	 <p>76% 74% 69% 77% 75% 76% 76% 68% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+11%
Essex & Suffolk Water (2019 base sample: 150)	69.5%	 <p>69% 61% 71% 74% 70% 70% 72% 66% 74%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+8%
Hartlepool Water (2019 base sample: 150)	83.3%	 <p>80% 83% 82% 86% 86% 84% 82% 82% 84%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+2%
Portsmouth Water (2019 base sample: 301)	72.5%	 <p>73% 69% 78% 77% 73% 74% 74% 69% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↓	-4%
South East Water (2019 base sample: 350)	70.7%	 <p>69% 71% 63% 73% 78% 65% 74% 73% 69%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-5%
South Staffs Water (2019 base sample: 152)	75.9%	 <p>71% 66% 74% 80% 83% 75% 82% 76% 75%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-1%
SES Water (2019 base sample: 150)	71.9%	 <p>75% 78% 67% 73% 76% 73% 66% 64% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+13%

2.3 Fairness of charges

Water bill payers were asked how much they agreed or disagreed that the water and/or sewerage charges they pay are fair. Perceptions of fairness for England and Wales, and for each nation are shown in Figure 14. This is followed by views on fairness by each WaSC in Table 12 and by each WoC in Table 13.

Figure 14: Fairness of charges

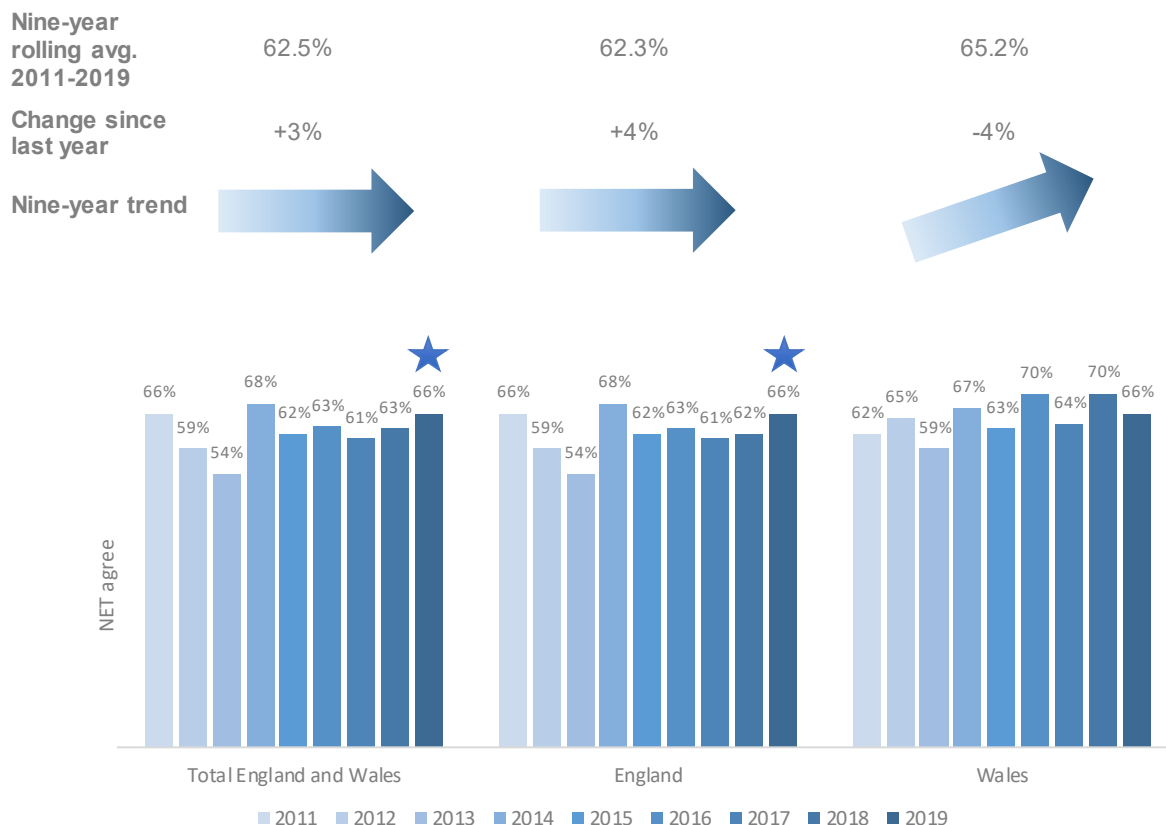


Table 12: Fairness of charges – WaSCs

Agree charges are fair	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	62.5%		↔	n/a	+3%
Total WaSCs (2019 base sample: 4003)	62.5%		↔	66%	+3%
Anglian Water (2019 base sample: 400)	62.8%		↔	↔	+4%

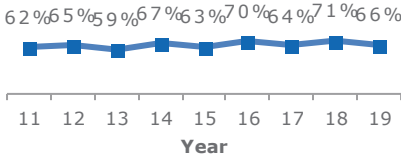
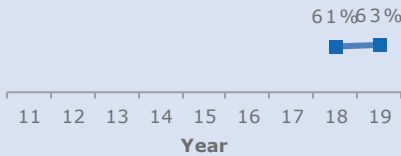
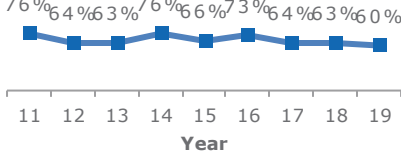
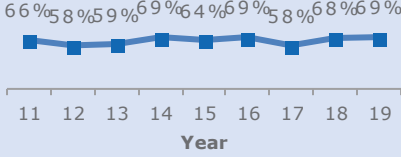
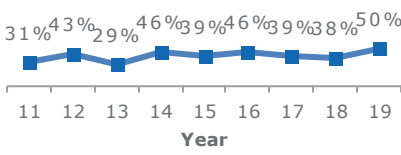

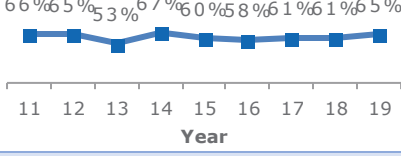
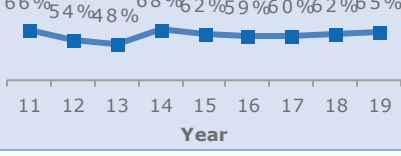
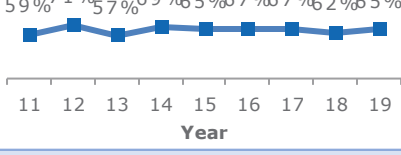

Dŵr Cymru Welsh Water (2019 base sample: 400)	65.1%	 <p>62% 65% 59% 67% 63% 70% 64% 71% 66%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-4%
Hafren Dyfrdwy (2019 base sample: 200)	61.8%	 <p>61% 63%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	+2%
Northumbrian Water (2019 base sample: 200)	67.3%	 <p>76% 64% 63% 76% 66% 73% 64% 63% 60%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-3%
Severn Trent (2019 base sample: 701)	64.3%	 <p>66% 58% 59% 69% 64% 69% 58% 68% 69%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	0%
South West Water (2019 base sample: 200)	40.2%	 <p>31% 43% 29% 46% 39% 46% 39% 38% 50%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	+12%
Southern Water (2019 base sample: 401)	61.4%	 <p>66% 60% 57% 68% 53% 67% 62% 60% 59%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↓	-1%
Thames Water (2019 base sample: 200)	61.8%	 <p>66% 65% 53% 67% 60% 58% 61% 61% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+5%
United Utilities (2019 base sample: 700)	60.4%	 <p>66% 54% 48% 68% 62% 59% 60% 62% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+2%
Wessex Water (2019 base sample: 200)	64.6%	 <p>59% 71% 57% 69% 65% 67% 67% 62% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+3%
Yorkshire Water (2019 base sample: 401)	67.8%	 <p>75% 59% 59% 71% 67% 71% 65% 69% 75%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+6%

Table 13: Fairness of charges - WoCs

Agree charges are fair	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	62.5%	<p>66% 65.9% 65.4% 68% 62% 63% 66.1% 63% 66%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	n/a	+3%
Total WoCs (2019 base sample: 2307)	62.2%	<p>68% 60% 65.4% 67% 62% 61% 62% 60% 67%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	67%	+7%
Affinity Water Central (2019 base sample: 150)	58.5%	<p>62% 54% 63% 62% 57% 59% 58% 55% 68%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+13%
Affinity Water East (2019 base sample: 151)	62.0%	<p>71% 59% 66% 70% 61% 61% 59% 67% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	+7%
Affinity Water South East (2019 base sample: 151)	58.7%	<p>69% 66% 47% 66% 57% 63% 52% 50% 58%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↓	+9%
Bournemouth Water (2019 base sample: 152)	70.3%	<p>71% 63% 61% 79% 61% 81% 71% 72% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+4%
Bristol Water (2019 base sample: 300)	61.8%	<p>64% 61% 51% 64% 59% 51% 67% 68% 72%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+4%
Cambridge Water (2019 base sample: 150)	67.3%	<p>69% 70% 56% 72% 67% 67% 66% 63% 77%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+14%
Essex & Suffolk Water (2019 base sample: 150)	61.2%	<p>73% 55% 58% 63% 58% 58% 57% 61% 68%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+7%
Hartlepool Water (2019 base sample: 150)	72.5%	<p>77% 66% 66% 83% 74% 69% 68% 67% 82%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+15%

Portsmouth Water (2019 base sample: 301)	67.9%		↔	↔	+7%
South East Water (2019 base sample: 350)	61.1%		↔	↔	+2%
South Staffs Water (2019 base sample: 152)	65.4%		↔	↔	+5%
SES Water (2019 base sample: 150)	62.7%		↓	↔	+9%

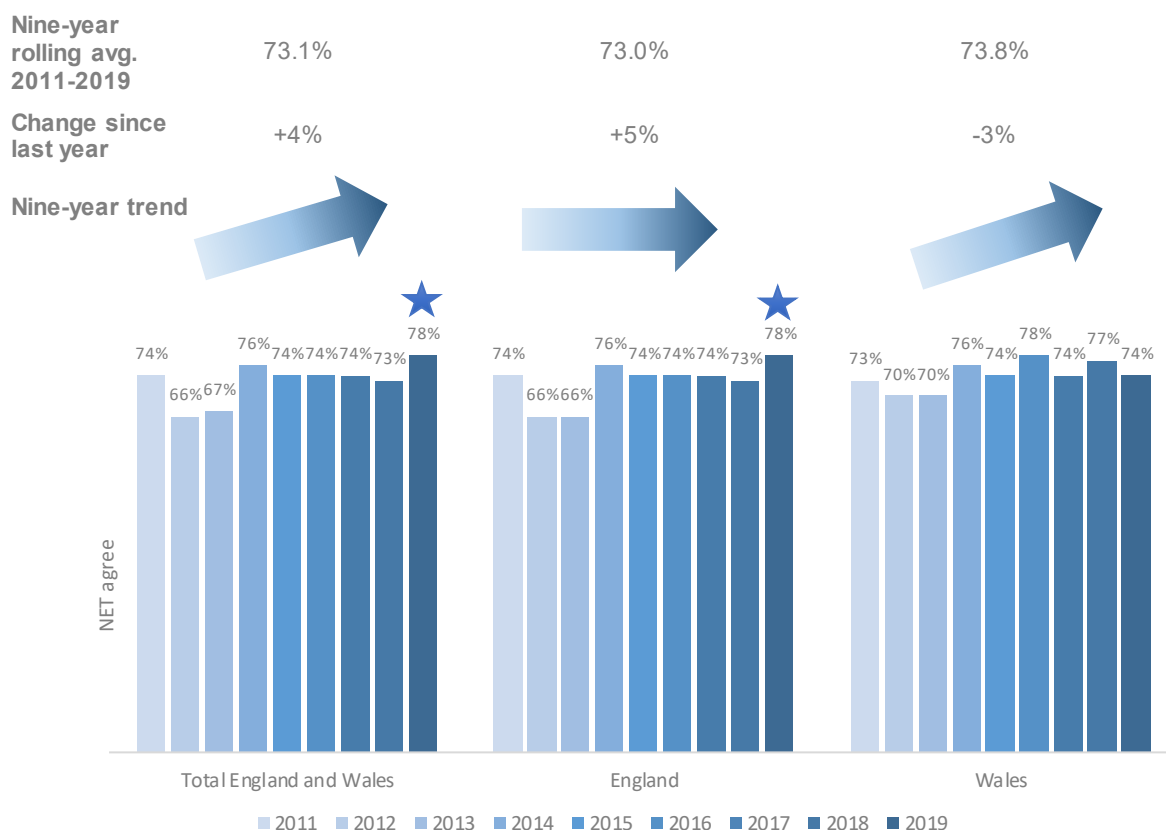
2.4 Affordability of charges

Customers were asked to what extent they agree that the water and/or sewerage charges they pay are affordable. Figure 15 shows nine-year trends for perceptions of affordability at national levels; this is followed by Table 14 and Table 15, which show affordability trends by WaSC and WoC.

Prior to 2019, affordability of water and sewerage charges was also reported separately for WoCs (affordability of water charges, affordability of sewerage charges, with a third question asking about affordability of the total charges – introduced in 2013). The questions regarding water charges and sewerage charges have been deleted in 2019 and data for WoCs is only presented at a total level.²¹

²¹ In previous years the vast majority of people gave the same response across all 3 measures; and if they didn't then two-thirds of the time the water bill and the overall/combined rating matched, which shows that water was as much more on their mind than sewerage when answering for overall affordability. Therefore, any statistical changes won't be because of this change.

Figure 15: Affordability of water and sewerage charges



★ Significant difference between 2018 and 2019 data.

Table 14: Affordability of water and sewerage charges – WaSCs

Agree charges are affordable	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	73.1%		↑	n/a	+4%
Total WaSCs (2019 base sample: 4003)	72.8%		↔	77%	+3%
Anglian Water (2019 base sample: 400)	73.8%		↑	↔	+3%
Dŵr Cymru Welsh Water (2019 base sample: 400)	73.7%		↑	↔	-3%


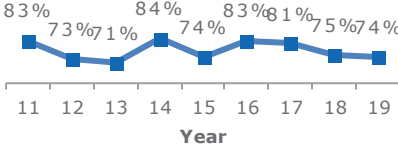
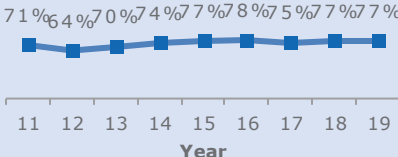
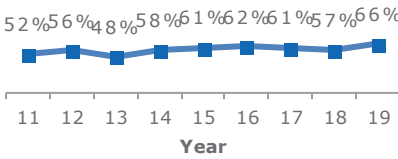
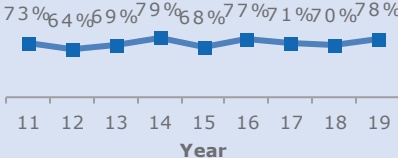
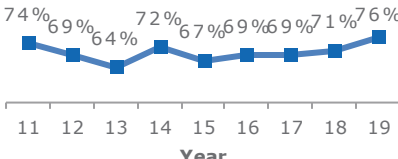
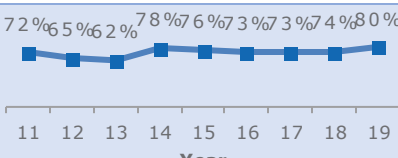
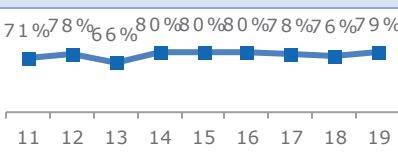
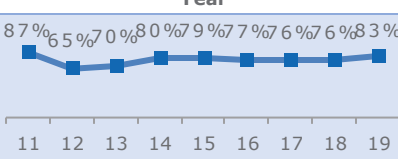
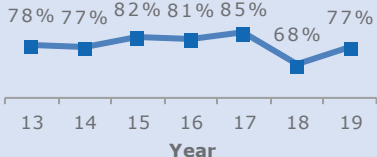
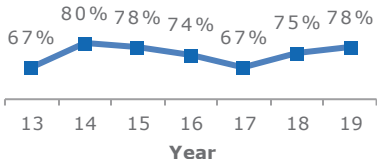
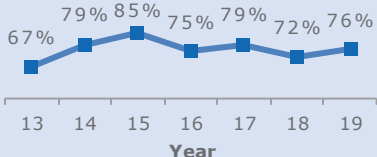
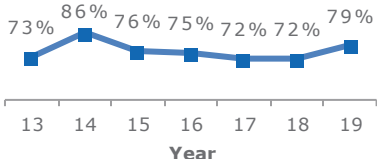
Hafren Dyfrdwy (2019 base sample: 200)	74.7%	 <p>74% 75%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	+2%
Northumbrian Water (2019 base sample: 200)	77.6%	 <p>83% 73% 71% 84% 74% 83% 81% 75% 74%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-1%
Severn Trent (2019 base sample: 701)	73.6%	 <p>71% 64% 70% 74% 77% 78% 75% 77% 77%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	0%
South West Water (2019 base sample: 200)	57.9%	 <p>52% 56% 48% 58% 61% 62% 61% 57% 56%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	+8%
Southern Water (2019 base sample: 401)	72.2%	 <p>73% 64% 69% 79% 68% 77% 77% 70% 78%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+7%
Thames Water (2019 base sample: 200)	70.1%	 <p>74% 69% 64% 72% 67% 69% 69% 71% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+5%
United Utilities (2019 base sample: 700)	72.4%	 <p>72% 65% 62% 78% 76% 73% 73% 74% 80%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+6%
Wessex Water (2019 base sample: 200)	76.4%	 <p>71% 78% 66% 80% 80% 80% 78% 76% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+3%
Yorkshire Water (2019 base sample: 401)	77.0%	 <p>87% 65% 70% 80% 79% 77% 76% 76% 83%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↑	+7%

Table 15: Affordability of water and sewerage charges – WoCs

Agree total charges are affordable	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company average vs WoC average	Change since last year																
Industry (2019 base sample: 6310)	73.1%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>67%</td><td>76%</td><td>74%</td><td>74%</td><td>74%</td><td>73%</td><td>78%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	67%	76%	74%	74%	74%	73%	78%	↑	n/a	+4%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	67%	76%	74%	74%	74%	73%	78%														
Total WoCs (2019 base sample: 2307)	74.5%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>69%</td><td>77%</td><td>77%</td><td>73%</td><td>75%</td><td>71%</td><td>79%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	69%	77%	77%	73%	75%	71%	79%	↑	79%	+8%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	69%	77%	77%	73%	75%	71%	79%														
Affinity Water Central (2019 base sample: 150)	72.2%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>66%</td><td>72%</td><td>76%</td><td>71%</td><td>77%</td><td>65%</td><td>79%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	66%	72%	76%	71%	77%	65%	79%	↑	↔	+14%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	66%	72%	76%	71%	77%	65%	79%														
Affinity Water East (2019 base sample: 151)	73.7%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>64%</td><td>78%</td><td>72%</td><td>76%</td><td>76%</td><td>71%</td><td>80%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	64%	78%	72%	76%	76%	71%	80%	↑	↔	+9%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	64%	78%	72%	76%	76%	71%	80%														
Affinity Water South East (2019 base sample: 151)	68.0%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>59%</td><td>76%</td><td>73%</td><td>68%</td><td>64%</td><td>65%</td><td>70%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	59%	76%	73%	68%	64%	65%	70%	↔	↓	+6%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	59%	76%	73%	68%	64%	65%	70%														
Bournemouth Water (2019 base sample: 152)	80.8%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>69%</td><td>89%</td><td>75%</td><td>89%</td><td>79%</td><td>80%</td><td>86%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	69%	89%	75%	89%	79%	80%	86%	↑	↔	+6%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	69%	89%	75%	89%	79%	80%	86%														
Bristol Water (2019 base sample: 300)	74.1%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>67%</td><td>74%</td><td>74%</td><td>66%</td><td>77%</td><td>78%</td><td>81%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	67%	74%	74%	66%	77%	78%	81%	↑	↔	+2%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	67%	74%	74%	66%	77%	78%	81%														
Cambridge Water (2019 base sample: 150)	80.5%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>80%</td><td>81%</td><td>79%</td><td>79%</td><td>79%</td><td>80%</td><td>84%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	80%	81%	79%	79%	79%	80%	84%	↔	↔	+4%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	80%	81%	79%	79%	79%	80%	84%														
Essex & Suffolk Water (2019 base sample: 150)	73.3%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>73%</td><td>78%</td><td>73%</td><td>66%</td><td>72%</td><td>69%</td><td>81%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	73%	78%	73%	66%	72%	69%	81%	↔	↔	+12%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	73%	78%	73%	66%	72%	69%	81%														
Hartlepool Water (2019 base sample: 150)	81.0%	<table><thead><tr><th>Year</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Value</td><td>77%</td><td>86%</td><td>82%</td><td>79%</td><td>79%</td><td>76%</td><td>88%</td></tr></tbody></table>	Year	2013	2014	2015	2016	2017	2018	2019	Value	77%	86%	82%	79%	79%	76%	88%	↔	↑	+11%
Year	2013	2014	2015	2016	2017	2018	2019														
Value	77%	86%	82%	79%	79%	76%	88%														

Portsmouth Water (2019 base sample: 301)	78.2%		↔	↔	+9%
South East Water (2019 base sample: 350)	74.1%		↑	↔	+3%
South Staffs Water (2019 base sample: 152)	76.2%		↔	↔	+3%
SES Water (2019 base sample: 150)	76.1%		↔	↔	+8%

Footnote: Question introduced for WoCs in 2013. Industry average based on nine years.

Chapter 3: Awareness of WaterSure support tariff, Priority Services and metering options

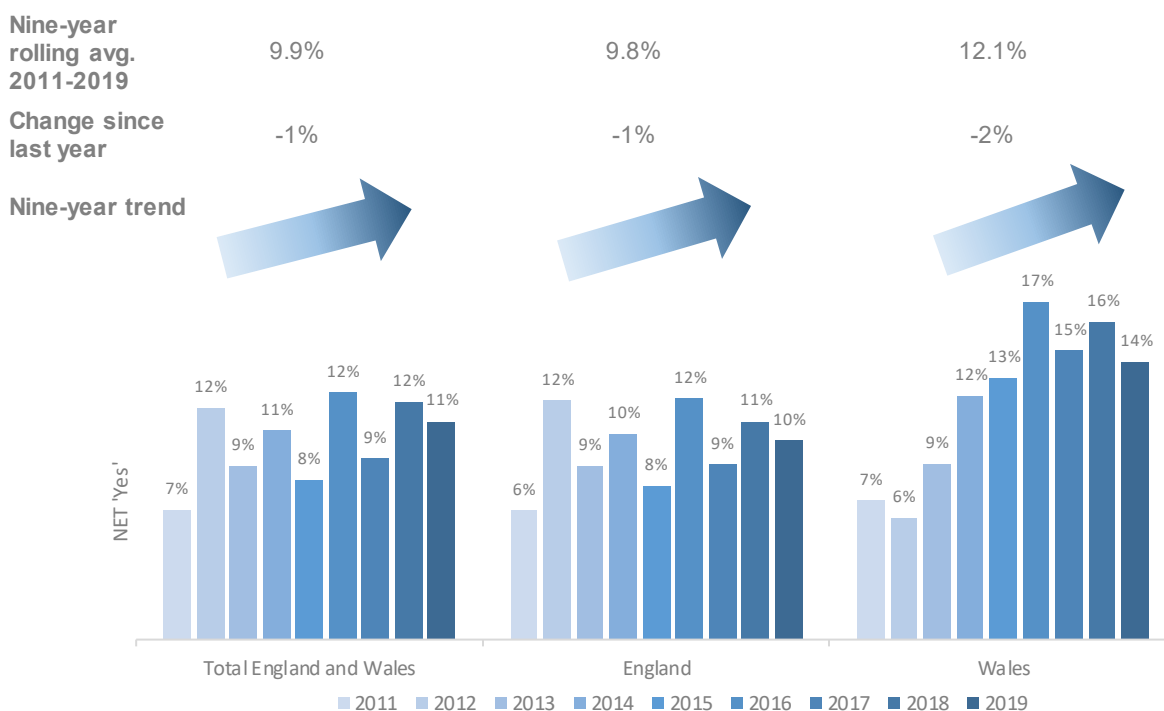
Water companies are obliged to provide financial support schemes specifically designed for low-income customers who struggle to afford their bills. They also offer priority services to customers with specific requirements to ensure accessing services is as easy as possible. This includes the provision of large print or Braille bills, passwords to check that company callers are genuine, liaison with customers on dialysis who need a constant supply of water and a record of households that may need bottled water delivered in the event of disruption to water supplies.

3.1 Awareness of WaterSure/WaterSure Wales

The WaterSure tariff is provided by all companies in England and Wales. It aims to help customers in genuine financial hardship who struggle to afford their water charges by capping their annual charge so it is no more than the average metered bill for the company that serves them.

Customers must first meet a number of criteria to be eligible for WaterSure. To understand awareness of the WaterSure social tariff, customers were asked if they had ever heard of it or were subscribed to it. Figure 16 shows awareness and take-up across England and Wales, and for each nation over the last nine years. This is followed by Table 16 and Table 17, which show awareness and take-up for WaSCs and for WoCs respectively.

Figure 16: Awareness of WaterSure/WaterSure Wales



Footnote: Percentages reflect customers who were aware but not subscribed and customers who were subscribed.

Table 16: Awareness of WaterSure/ WaterSure Wales – WaSCs

Awareness of WaterSure/ WaterSure Wales	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	9.9%	<p>Year</p>	↑	n/a	-1%
Total WaSCs (2019 base sample: 4003)	10.0%	<p>Year</p>	↑	10%	-2%
Anglian Water (2019 base sample: 400)	12.4%	<p>Year</p>	↑	↔	-3%
Dŵr Cymru Welsh Water (2019 base sample: 400)	12.4%	<p>Year</p>	↑	↔	-3%
Hafren Dyfrdwy (2019 base sample: 200)	11.4%	<p>Year</p>	n/a	↔	+1%
Northumbrian Water (2019 base sample: 200)	8.0%	<p>Year</p>	↑	↔	+2%
Severn Trent (2019 base sample: 701)	8.0%	<p>Year</p>	↑	↔	+1%
South West Water (2019 base sample: 200)	19.2%	<p>Year</p>	↓	↑	+2%
Southern Water (2019 base sample: 401)	13.8%	<p>Year</p>	↔	↔	-2%
Thames Water (2019 base sample: 200)	10.9%	<p>Year</p>	↑	↔	-3%

United Utilities (2019 base sample: 700)	7.3%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Awareness (%)</td><td>6%</td><td>5%</td><td>9%</td><td>11%</td><td>7%</td><td>7%</td><td>6%</td><td>8%</td><td>7%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Awareness (%)	6%	5%	9%	11%	7%	7%	6%	8%	7%	↔	↓	-1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Awareness (%)	6%	5%	9%	11%	7%	7%	6%	8%	7%																
Wessex Water (2019 base sample: 200)	10.3%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>18%</td><td>11%</td><td>11%</td><td>6%</td><td>14%</td><td>8%</td><td>9%</td><td>9%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Awareness (%)	7%	18%	11%	11%	6%	14%	8%	9%	9%	↔	↔	-1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Awareness (%)	7%	18%	11%	11%	6%	14%	8%	9%	9%																
Yorkshire Water (2019 base sample: 401)	8.0%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Awareness (%)</td><td>5%</td><td>5%</td><td>9%</td><td>10%</td><td>5%</td><td>11%</td><td>8%</td><td>11%</td><td>7%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Awareness (%)	5%	5%	9%	10%	5%	11%	8%	11%	7%	↑	↔	-3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Awareness (%)	5%	5%	9%	10%	5%	11%	8%	11%	7%																

Table 17: Awareness of WaterSure – WoCs

Awareness of WaterSure	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year																				
Industry (2019 base sample: 6310)	9.9%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>12%</td><td>9%</td><td>11%</td><td>8%</td><td>12%</td><td>9%</td><td>12%</td><td>11%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	7%	12%	9%	11%	8%	12%	9%	12%	11%	↑	n/a	-1%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	7%	12%	9%	11%	8%	12%	9%	12%	11%																
Total WoCs (2019 base sample: 2307)	9.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>6%</td><td>13%</td><td>9%</td><td>10%</td><td>6%</td><td>12%</td><td>10%</td><td>10%</td><td>11%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	6%	13%	9%	10%	6%	12%	10%	10%	11%	↑	11%	+1%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	6%	13%	9%	10%	6%	12%	10%	10%	11%																
Affinity Water Central (2019 base sample: 150)	8.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>5%</td><td>6%</td><td>7%</td><td>8%</td><td>5%</td><td>12%</td><td>11%</td><td>12%</td><td>12%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	5%	6%	7%	8%	5%	12%	11%	12%	12%	↑	↔	0%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	5%	6%	7%	8%	5%	12%	11%	12%	12%																
Affinity Water East (2019 base sample: 151)	17.3%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>17%</td><td>16%</td><td>22%</td><td>18%</td><td>16%</td><td>20%</td><td>11%</td><td>18%</td><td>17%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	17%	16%	22%	18%	16%	20%	11%	18%	17%	↔	↔	-1%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	17%	16%	22%	18%	16%	20%	11%	18%	17%																
Affinity Water South East (2019 base sample: 151)	14.5%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>11%</td><td>13%</td><td>14%</td><td>16%</td><td>13%</td><td>20%</td><td>18%</td><td>13%</td><td>13%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	11%	13%	14%	16%	13%	20%	18%	13%	13%	↑	↔	-1%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	11%	13%	14%	16%	13%	20%	18%	13%	13%																
Bournemouth Water (2019 base sample: 152)	10.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>7%</td><td>10%</td><td>8%</td><td>9%</td><td>12%</td><td>15%</td><td>11%</td><td>14%</td><td>9%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	7%	10%	8%	9%	12%	15%	11%	14%	9%	↑	↔	-4%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	7%	10%	8%	9%	12%	15%	11%	14%	9%																
Bristol Water (2019 base sample: 300)	9.6%	<table><tr><th>Year</th><th>11</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th></tr><tr><td>Awareness (%)</td><td>4%</td><td>15%</td><td>9%</td><td>11%</td><td>8%</td><td>11%</td><td>7%</td><td>13%</td><td>9%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Awareness (%)	4%	15%	9%	11%	8%	11%	7%	13%	9%	↔	↔	-4%
Year	11	12	13	14	15	16	17	18	19																
Awareness (%)	4%	15%	9%	11%	8%	11%	7%	13%	9%																

Cambridge Water (2019 base sample: 150)	9.6%	<p>9% 3% 10% 9% 9% 12% 8% 16% 10%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-6%
Essex & Suffolk Water (2019 base sample: 150)	10.2%	<p>8% 12% 14% 10% 7% 12% 6% 11% 13%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+2%
Hartlepool Water (2019 base sample: 150)	10.4%	<p>4% 8% 10% 10% 6% 11% 7% 21% 15%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-6%
Portsmouth Water (2019 base sample: 301)	8.6%	<p>5% 19% 6% 7% 6% 10% 9% 8% 9%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+1%
South East Water (2019 base sample: 350)	10.0%	<p>7% 25% 8% 11% 2% 13% 11% 6% 10%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+5%
South Staffs Water (2019 base sample: 152)	8.8%	<p>5% 8% 9% 11% 3% 8% 10% 11% 14%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+3%
SES Water (2019 base sample: 150)	10.6%	<p>3% 22% 8% 14% 12% 7% 14% 8% 11%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+3%

3.2 Awareness of Priority Services

Respondents were asked if they were 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, liaison with customers on dialysis who need a constant supply of water, and records of households which may need bottled water delivered in the event of disruption to water supplies. The question wording changed in 2014 to its current form²² so six years of data is shown.

Figure 17 shows national level awareness and trends over the last nine years. This is followed by awareness for each WaSC in Table 18, and for each WoC in Table 19.

Figure 17: Awareness of Priority Services

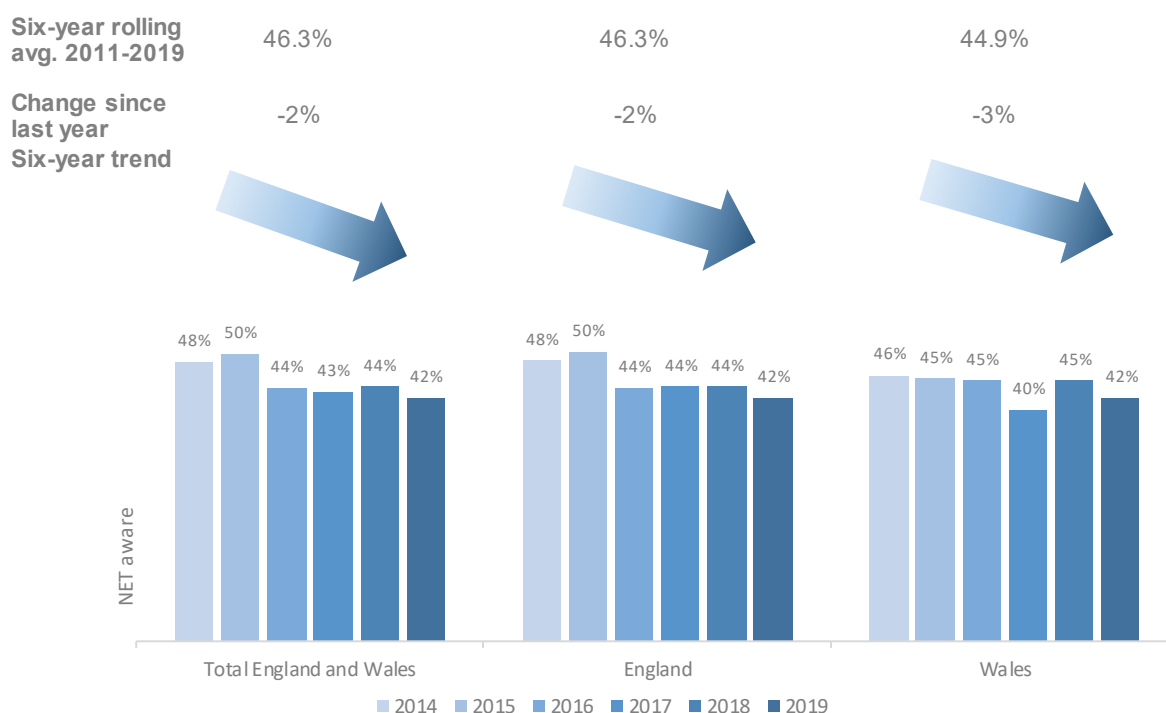


Table 18: Awareness of Priority Services – WaSCs

Awareness of Priority services	Six-year rolling company average	Six-year company trend	Six-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	46.3%		↓	n/a	-2%
Total WaSCs (2019 base sample: 4003)	46.0%		↓	42%	-1%

²² Data previously shown from 2011 but removed in 2019 to reflect more accurate trends.

Anglian Water (2019 base sample: 400)	48.3%	<div><div>51%54%45%46%47%41%</div><div>141516171819</div><div>Year</div></div>	↓	↔	-6%
Dŵr Cymru Welsh Water (2019 base sample: 400)	44.8%	<div><div>46%45%46%40%46%43%</div><div>141516171819</div><div>Year</div></div>	↓	↔	-3%
Hafren Dyfrdwy (2019 base sample: 200)	42.8%	<div><div>43%42%</div><div>1819</div><div>Year</div></div>	n/a	↔	-2%
Northumbrian Water (2019 base sample: 200)	44.9%	<div><div>43%50%44%42%45%41%</div><div>141516171819</div><div>Year</div></div>	↓	↔	-4%
Severn Trent (2019 base sample: 701)	47.6%	<div><div>47%51%48%46%41%47%</div><div>141516171819</div><div>Year</div></div>	↔	↔	+6%
South West Water (2019 base sample: 200)	52.0%	<div><div>58%59%45%52%48%44%</div><div>141516171819</div><div>Year</div></div>	↔	↔	-3%
Southern Water (2019 base sample: 401)	44.8%	<div><div>51%52%39%43%42%39%</div><div>141516171819</div><div>Year</div></div>	↓	↔	-2%
Thames Water (2019 base sample: 200)	39.6%	<div><div>43%41%37%37%41%35%</div><div>141516171819</div><div>Year</div></div>	↓	↓	-6%
United Utilities (2019 base sample: 700)	48.7%	<div><div>52%51%45%46%43%49%</div><div>141516171819</div><div>Year</div></div>	↓	↑	+5%
Wessex Water (2019 base sample: 200)	49.3%	<div><div>52%57%47%43%49%43%</div><div>141516171819</div><div>Year</div></div>	↔	↔	-6%
Yorkshire Water (2019 base sample: 401)	47.0%	<div><div>48%47%48%45%47%42%</div><div>141516171819</div><div>Year</div></div>	↓	↔	-5%

Table 19: Awareness of Priority Services – WoCs

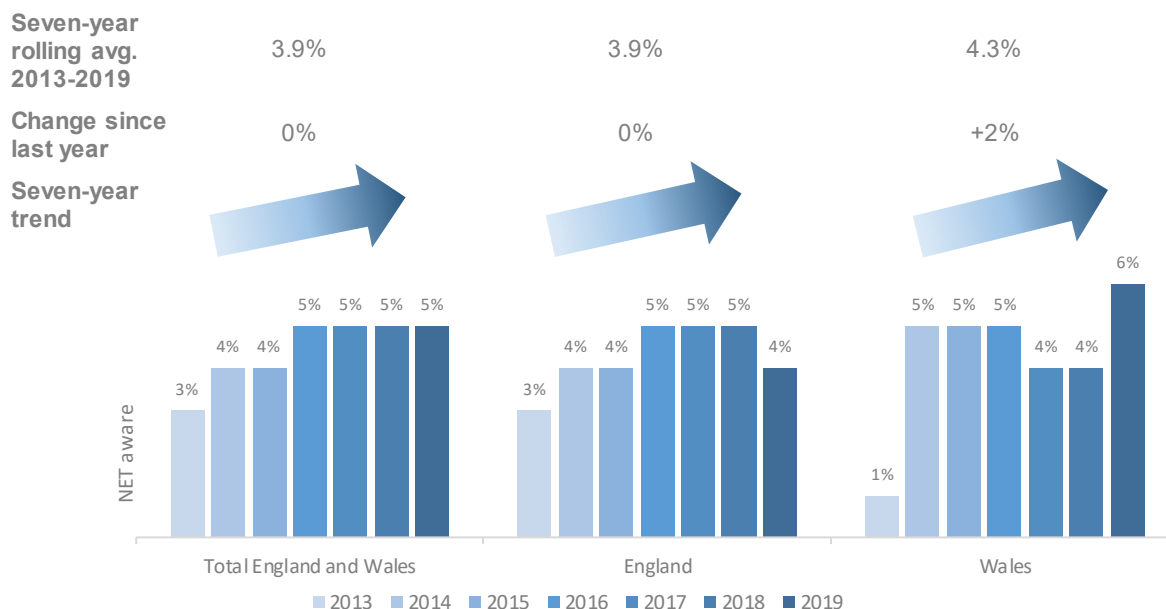
Awareness of Priority services	Six-year rolling company average	Six-year company trend	Six-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	46.3%	<p>Year</p>	↓	n/a	-2%
Total WoCs (2019 base sample: 2307)	47.2%	<p>Year</p>	↓	43%	-3%
Affinity Water Central (2019 base sample: 150)	42.3%	<p>Year</p>	↓	↔	-1%
Affinity Water East (2019 base sample: 151)	48.7%	<p>Year</p>	↔	↔	-1%
Affinity Water South East (2019 base sample: 151)	49.0%	<p>Year</p>	↔	↔	+3%
Bournemouth Water (2019 base sample: 152)	48.9%	<p>Year</p>	↔	↔	-9%
Bristol Water (2019 base sample: 300)	51.6%	<p>Year</p>	↔	↔	-8%
Cambridge Water (2019 base sample: 150)	51.3%	<p>Year</p>	↔	↑	+8%
Essex & Suffolk Water (2019 base sample: 150)	50.2%	<p>Year</p>	↔	↔	0%
Hartlepool Water (2019 base sample: 150)	50.3%	<p>Year</p>	↔	↑	+7%

Portsmouth Water (2019 base sample: 301)	50.6%		↔	↔	-3%
South East Water (2019 base sample: 350)	48.3%		↔	↔	-10%
South Staffs Water (2019 base sample: 152)	45.5%		↓	↔	-6%
SES Water (2019 base sample: 150)	44.4%		↓	↔	+6%

3.3 Awareness of company specific social tariff schemes

Since 2013, respondents have also been asked if they are aware of any other company specific schemes designed to provide lower charges for customers who struggle to pay their bills. Figure 18 shows the proportion of customers who are aware of company specific social tariff schemes at national levels and for England and for Wales. This is followed by Table 20 and Table 21, which show awareness for each WaSC and for each WoC respectively.

Figure 18: Awareness of company specific social tariff schemes²³



²³ Data on awareness of company specific social tariffs is available from 2013

Table 20: Awareness of company specific social tariff schemes – WaSCs

Awareness of social tariff schemes	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company average vs WaSC average	Change since last year																
Industry (2019 base sample: 6310)	3.9%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>3%</td><td>4%</td><td>4%</td><td>5%</td><td>5%</td><td>5%</td><td>5%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	3%	4%	4%	5%	5%	5%	5%	↑	n/a	0%
Year	13	14	15	16	17	18	19														
Awareness (%)	3%	4%	4%	5%	5%	5%	5%														
Total WaSCs (2019 base sample: 4003)	4.1%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>3%</td><td>4%</td><td>4%</td><td>5%</td><td>5%</td><td>5%</td><td>5%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	3%	4%	4%	5%	5%	5%	5%	↑	5%	-1%
Year	13	14	15	16	17	18	19														
Awareness (%)	3%	4%	4%	5%	5%	5%	5%														
Anglian Water (2019 base sample: 400)	6.0%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>6%</td><td>5%</td><td>7%</td><td>10%</td><td>6%</td><td>6%</td><td>6%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	6%	5%	7%	10%	6%	6%	6%	↔	↔	-1%
Year	13	14	15	16	17	18	19														
Awareness (%)	6%	5%	7%	10%	6%	6%	6%														
Dŵr Cymru Welsh Water (2019 base sample: 400)	4.3%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>1%</td><td>5%</td><td>5%</td><td>6%</td><td>5%</td><td>4%</td><td>7%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	1%	5%	5%	6%	5%	4%	7%	↑	↔	+3%
Year	13	14	15	16	17	18	19														
Awareness (%)	1%	5%	5%	6%	5%	4%	7%														
Hafren Dyfrdwy (2019 base sample: 200)	6.2%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td></td><td></td><td></td><td></td><td></td><td>7%</td><td>5%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)						7%	5%	n/a	↔	-1%
Year	13	14	15	16	17	18	19														
Awareness (%)						7%	5%														
Northumbrian Water (2019 base sample: 200)	3.0%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>3%</td><td>1%</td><td>2%</td><td>5%</td><td>3%</td><td>4%</td><td>4%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	3%	1%	2%	5%	3%	4%	4%	↑	↔	0%
Year	13	14	15	16	17	18	19														
Awareness (%)	3%	1%	2%	5%	3%	4%	4%														
Severn Trent (2019 base sample: 701)	3.7%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>2%</td><td>4%</td><td>4%</td><td>4%</td><td>6%</td><td>4%</td><td>5%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	2%	4%	4%	4%	6%	4%	5%	↑	↔	+1%
Year	13	14	15	16	17	18	19														
Awareness (%)	2%	4%	4%	4%	6%	4%	5%														
South West Water (2019 base sample: 200)	5.7%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>6%</td><td>6%</td><td>5%</td><td>6%</td><td>7%</td><td>8%</td><td>8%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	6%	6%	5%	6%	7%	8%	8%	↑	↑	0%
Year	13	14	15	16	17	18	19														
Awareness (%)	6%	6%	5%	6%	7%	8%	8%														
Southern Water (2019 base sample: 401)	4.3%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>4%</td><td>3%</td><td>5%</td><td>6%</td><td>5%</td><td>5%</td><td>3%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	4%	3%	5%	6%	5%	5%	3%	↔	↔	-3%
Year	13	14	15	16	17	18	19														
Awareness (%)	4%	3%	5%	6%	5%	5%	3%														
Thames Water (2019 base sample: 200)	3.8%	<table><tr><th>Year</th><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Awareness (%)</th><td>3%</td><td>5%</td><td>3%</td><td>4%</td><td>5%</td><td>7%</td><td>4%</td></tr></table>	Year	13	14	15	16	17	18	19	Awareness (%)	3%	5%	3%	4%	5%	7%	4%	↑	↔	-3%
Year	13	14	15	16	17	18	19														
Awareness (%)	3%	5%	3%	4%	5%	7%	4%														

United Utilities (2019 base sample: 700)	3.5%		↑	↔	-2%
Wessex Water (2019 base sample: 200)	4.6%		↓	↔	+1%
Yorkshire Water (2019 base sample: 401)	3.8%		↑	↔	+1%

Table 21: Awareness of company specific social tariff schemes – WoCs

Awareness of social tariff schemes	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	3.9%		↑	n/a	0%
Total WoCs (2019 base sample: 2307)	3.3%		↔	4%	+1%
Affinity Water Central (2019 base sample: 150)	2.2%		↔	↔	+1%
Affinity Water East (2019 base sample: 151)	5.6%		↔	↑	+4%
Affinity Water South East (2019 base sample: 151)	5.1%		↔	↔	0%
Bournemouth Water (2019 base sample: 152)	4.8%		↔	↔	2%
Bristol Water (2019 base sample: 300)	3.2%		↔	↔	1%

Cambridge Water (2019 base sample: 150)	4.0%		↑	↔	0%
Essex & Suffolk Water (2019 base sample: 150)	3.7%		↔	↔	+2%
Hartlepool Water (2019 base sample: 150)	3.3%		↔	↔	1%
Portsmouth Water (2019 base sample: 301)	3.7%		↔	↔	0%
South East Water (2019 base sample: 350)	3.8%		↔	↔	0%
South Staffs Water (2019 base sample: 152)	3.7%		↑	↔	2%
SES Water (2019 base sample: 150)	2.9%		↔	↔	1%

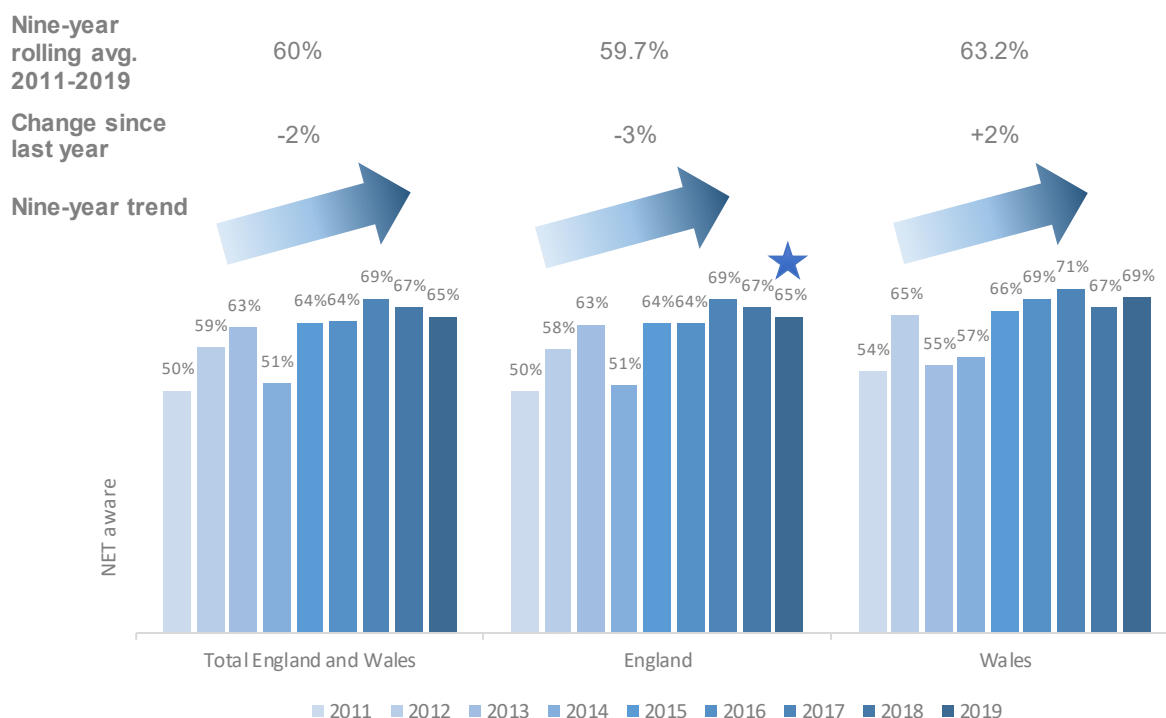
3.4 Awareness of free water meter trial schemes

Unless they live in a water company area where universal metering schemes are in place, customers who do not have a water meter at their property can ask their water company to fit a water meter. This would be at no cost to the customer provided the installation is fairly straightforward.

Respondents living in unmetered households in areas where the free meter scheme is available were first asked about their awareness that a water meter can be fitted for free.

Figure 19 shows awareness and trends at national levels, and Table 22 and Table 23 show this for WaSCs and WoCs respectively.

Figure 19: Awareness that water meters can be fitted free of charge – unmetered customers



★ Significant difference between 2018 and 2019 data.

Footnote: Because of company universal metering schemes, customers of Southern Water, Affinity Water South East and South East Water and some of Thames Water, Affinity Water Central and Affinity Water East were not asked this question.

Table 22: Awareness that water meters can be fitted free of charge – unmetered customers - WaSCs

Awareness that water meters can be fitted free of charge	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 2499)	60.0%		↑	n/a	-2%
Total WaSCs (2019 base sample: 1665)	59.6%		↑	64%	-2%
Anglian Water (2019 base sample: 97)	66.3%		↑	↔	0%
Dŵr Cymru Welsh Water (2019 base sample: 249)	63.2%		↑	↔	+3%

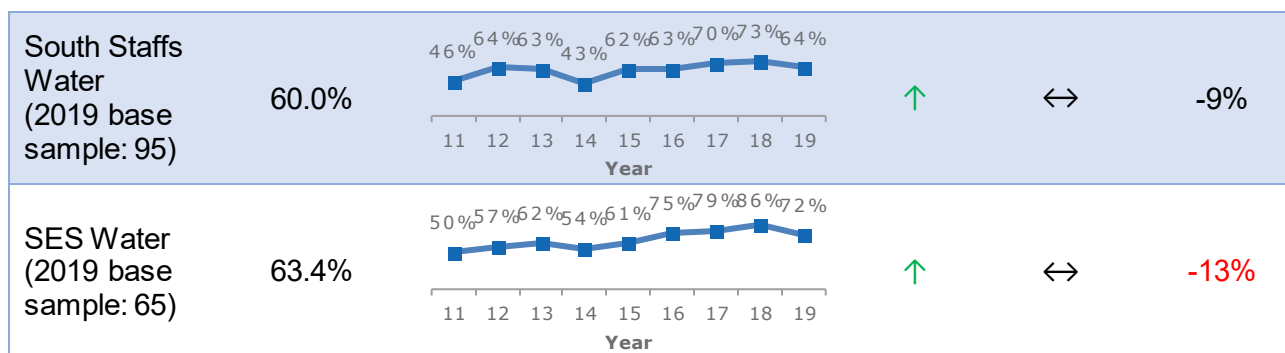
Hafren Dyfrdwy (2019 base sample: 90)	65.4%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>69%</td><td>62%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value								69%	62%	n/a	↔	-7%
Year	11	12	13	14	15	16	17	18	19																
Value								69%	62%																
Northumbrian Water (2019 base sample: 116)	57.9%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>44%</td><td>57%</td><td>61%</td><td>42%</td><td>60%</td><td>68%</td><td>69%</td><td>64%</td><td>62%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	44%	57%	61%	42%	60%	68%	69%	64%	62%	↑	↔	-2%
Year	11	12	13	14	15	16	17	18	19																
Value	44%	57%	61%	42%	60%	68%	69%	64%	62%																
Severn Trent (2019 base sample: 356)	58.1%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>51%</td><td>60%</td><td>58%</td><td>46%</td><td>64%</td><td>56%</td><td>67%</td><td>61%</td><td>66%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	51%	60%	58%	46%	64%	56%	67%	61%	66%	↔	↔	+5%
Year	11	12	13	14	15	16	17	18	19																
Value	51%	60%	58%	46%	64%	56%	67%	61%	66%																
South West Water (2019 base sample: 52) ²⁴	76.0%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>69%</td><td>72%</td><td>88%</td><td>75%</td><td>86%</td><td>77%</td><td>80%</td><td>82%</td><td>67%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	69%	72%	88%	75%	86%	77%	80%	82%	67%	↑	↔	-15%
Year	11	12	13	14	15	16	17	18	19																
Value	69%	72%	88%	75%	86%	77%	80%	82%	67%																
Thames Water (2019 base sample: 67)	52.8%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>48%</td><td>49%</td><td>61%</td><td>40%</td><td>57%</td><td>61%</td><td>67%</td><td>63%</td><td>45%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	48%	49%	61%	40%	57%	61%	67%	63%	45%	↑	↓	-18%
Year	11	12	13	14	15	16	17	18	19																
Value	48%	49%	61%	40%	57%	61%	67%	63%	45%																
United Utilities (2019 base sample: 380)	63.3%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>48%</td><td>59%</td><td>67%</td><td>57%</td><td>66%</td><td>69%</td><td>71%</td><td>71%</td><td>69%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	48%	59%	67%	57%	66%	69%	71%	71%	69%	↑	↔	-3%
Year	11	12	13	14	15	16	17	18	19																
Value	48%	59%	67%	57%	66%	69%	71%	71%	69%																
Wessex Water (2019 base sample: 80)	66.0%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>50%</td><td>63%</td><td>67%</td><td>59%</td><td>65%</td><td>70%</td><td>79%</td><td>78%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	50%	63%	67%	59%	65%	70%	79%	78%	76%	↑	↑	-2%
Year	11	12	13	14	15	16	17	18	19																
Value	50%	63%	67%	59%	65%	70%	79%	78%	76%																
Yorkshire Water (2019 base sample: 178)	57.7%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Value</th><td>47%</td><td>55%</td><td>55%</td><td>51%</td><td>61%</td><td>64%</td><td>63%</td><td>65%</td><td>71%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Value	47%	55%	55%	51%	61%	64%	63%	65%	71%	↑	↔	+5%
Year	11	12	13	14	15	16	17	18	19																
Value	47%	55%	55%	51%	61%	64%	63%	65%	71%																

Footnote: Customers of Southern Water and some of Thames Water were not asked this question because of their company's universal metering scheme.

²⁴ Percentage changes for low erbase sizes do tend to be more noticeable even if only one or tw o respondents have a different response to previous data. Please consider this w hen interpreting results.

Table 23: Awareness that water meters can be fitted free of charge – unmetered customers - WoCs

Awareness that water meters can be fitted free of charge	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 2499)	60.0%	<p>50% 59% 63% 51% 64% 64% 69% 67% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	n/a	-2%
Total WoCs (2019 base sample: 834)	61.3%	<p>50% 63% 67% 52% 65% 64% 69% 72% 68%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	68%	-5%
Affinity Water Central (2019 base sample: 31)	57.1%	<p>45% 64% 69% 50% 59% 53% 65% 66% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-1%
Affinity Water East (2019 base sample: 32)	63.7%	<p>67% 61% 76% 60% 62% 56% 67% 70% 78%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+8%
Bournemouth Water (2019 base sample: 60)	66.0%	<p>61% 74% 74% 49% 68% 67% 71% 75% 70%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-5%
Bristol Water (2019 base sample: 145)	64.4%	<p>48% 67% 70% 58% 72% 66% 70% 70% 75%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+5%
Cambridge Water (2019 base sample: 38)	60.4%	<p>55% 54% 59% 53% 69% 65% 60% 73% 63%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-10%
Essex & Suffolk Water (2019 base sample: 61)	67.0%	<p>52% 67% 70% 63% 75% 76% 69% 76% 64%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-12%
Hartlepool Water (2019 base sample: 88)	61.7%	<p>50% 46% 62% 52% 64% 64% 70% 81% 73%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-9%
Portsmouth Water (2019 base sample: 200)	59.4%	<p>48% 46% 62% 44% 63% 65% 72% 73% 71%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-2%

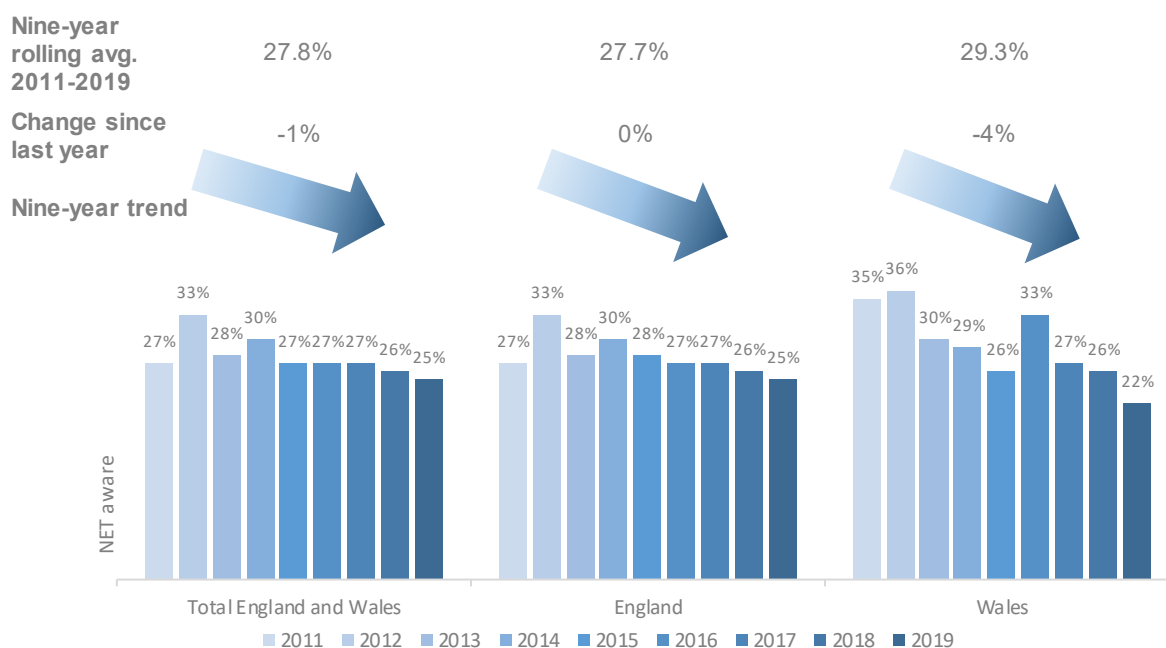


Footnote: All customers of South East Water and Affinity Water South East, as well as some of Affinity Water Central and Affinity Water East were not asked this question because of their company's universal metering scheme.

3.5 Awareness that a water meter can be trialed – unmetered customers

When a customer in an unmetered household asks for a water meter to be fitted, they can ask to go back to a fixed charge based on their property as long as it is within 24 months of the meter being fitted. Unmetered respondents were asked whether they knew about this trial period. Awareness and trends for England and Wales and for each nation are shown in Figure 20. This is followed by Table 24 and Table 25 which show this for each WaSC and WoC respectively.

Figure 20: Awareness of the possibility to trial a water meter – unmetered customers



Footnote: Because of company universal metering schemes, customers of Southern Water, South East Water and Affinity Water South East, as well as some customers of Thames Water, Affinity Water Central and Affinity Water East were not asked this question. Time period changed in 2018 from 1 or 2 years (dependant on company) in 2017 to 2 years for all companies in 2018.

Table 24: Awareness of the possibility to trial a water meter – unmetered customers - WaSCs

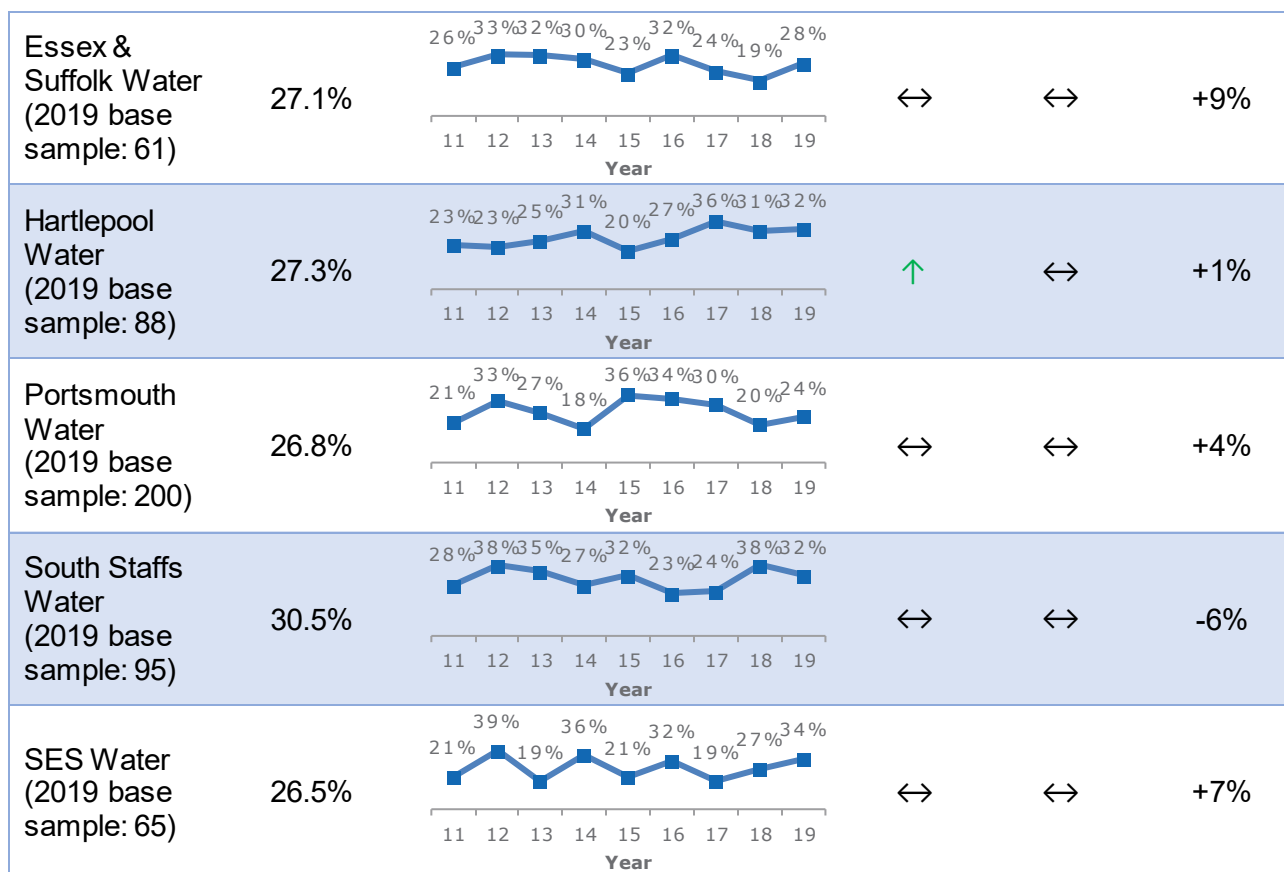
Awareness of the 24-month trial period for a water meter	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 2499)	27.8%	<p>27% 33% 28% 30% 27% 27% 27% 26% 25%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	n/a	-1%
Total WaSCs (2019 base sample: 1665)	27.8%	<p>28% 33% 28% 30% 28% 27% 28% 26% 24%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	24%	-1%
Anglian Water (2019 base sample: 97)	37.5%	<p>34% 44% 45% 46% 31% 45% 30% 33% 32%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-1%
Dŵr Cymru Welsh Water (2019 base sample: 249)	29.4%	<p>35% 37% 29% 30% 26% 34% 27% 26% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-4%
Hafren Dyfrdwy (2019 base sample: 90)	26.3%	<p>30% 37% 29% 30% 26% 34% 27% 26% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	-6%
Northumbrian Water (2019 base sample: 116)	25.8%	<p>21% 30% 31% 23% 24% 34% 28% 20% 21%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	0%
Severn Trent (2019 base sample: 356)	24.2%	<p>33% 30% 26% 26% 23% 17% 20% 20% 21%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	+1%
South West Water (2019 base sample: 52)	41.1%	<p>40% 57% 52% 42% 48% 40% 36% 35% 25%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-10%
Thames Water (2019 base sample: 67)	23.8%	<p>25% 28% 20% 25% 28% 26% 24% 27% 15%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↓	-12%
United Utilities (2019 base sample: 380)	30.8%	<p>24% 35% 31% 36% 32% 27% 37% 27% 31%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+4%

Wessex Water (2019 base sample: 80)	32.7%		↔	↑	-7%
Yorkshire Water (2019 base sample: 178)	27.1%		↔	↔	+5%

Footnote: Customers of Southern Water and some of Thames Water were excluded from this question because of the company's universal metering scheme

Table 25: Awareness of the possibility to trial a water meter – unmetered customers - WoCs

Awareness of the 24-month trial period for a water meter	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 2499)	27.8%		↓	n/a	-1%
Total WoCs (2019 base sample: 834)	27.7%		↔	27%	+1%
Affinity Water Central (2019 base sample: 31)	27.0%		↔	↔	+7%
Affinity Water East (2019 base sample: 32)	31.4%		↓	↔	+15%
Bournemouth Water (2019 base sample: 60)	28.6%		↓	↓	-13%
Bristol Water (2019 base sample: 145)	28.9%		↔	↔	-6%
Cambridge Water (2019 base sample: 38)	27.1%		↔	↔	-12%



Footnote: All customers of South East Water and Affinity Water South East, as well as some customers of Affinity Water Central and Affinity Water East were excluded from this question because of the companies' compulsory metering schemes

3.6 Communication about services, plans and additional services

In 2019, a new question was added to understand perceptions about how well water companies communicate about their services and plans, and availability of things such as WaterSure and Priority/additional services. Following the fieldwork pilot, the question wording was changed slightly so base sizes are slightly lower than the total sample base. Figure 21 shows national level data, and Table 26 and Table 27 show this for each WaSC and for each WoC respectively.

Figure 21: Perceptions of communications from water companies about services and plans

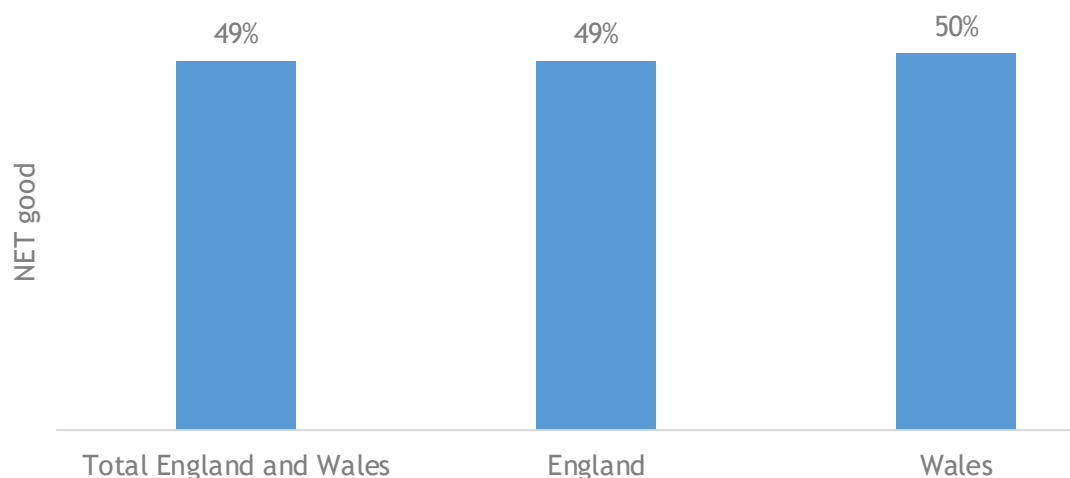


Table 26: Perceptions of communications from water companies about services and plans – WaSCs NET good

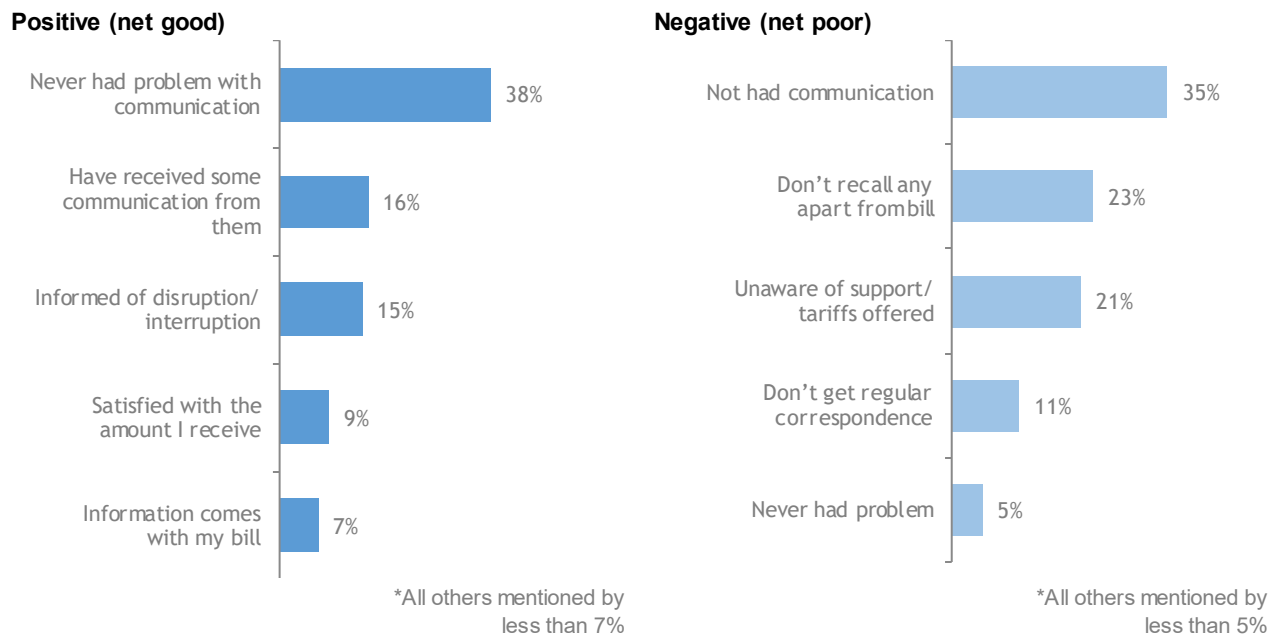
NET good	2019 NET Good	Company average vs WaSC average
Industry (2019 base sample: 5902)	49%	n/a
Total WaSCs (2019 base sample: 3767)	49%	n/a
Anglian Water (2019 base sample: 379)	47%	↔
Dŵr Cymru Welsh Water (2019 base sample: 378)	50%	↔
Hafren Dyfrdwy (2019 base sample: 185)	51%	↔
Northumbrian Water (2019 base sample: 186)	60%	↑
Severn Trent (2019 base sample: 658)	49%	↔
South West Water (2019 base sample: 189)	49%	↔
Southern Water (2019 base sample: 374)	40%	↓
Thames Water (2019 base sample: 188)	38%	↓
United Utilities (2019 base sample: 668)	49%	↔
Wessex Water (2019 base sample: 183)	64%	↑
Yorkshire Water (2019 base sample: 379)	58%	↑

Table 27: Perceptions of communications from water companies about services and plans – WoCs NET good

NET good	2019 NET Good	Company average vs WoC average
Industry (2019 base sample: 5902)	49%	n/a
Total WoCs (2019 base sample: 2135)	49%	n/a
Affinity Water Central (2019 base sample: 141)	48%	↔
Affinity Water East (2019 base sample: 139)	44%	↔
Affinity Water South East (2019 base sample: 135)	50%	↔
Bournemouth Water (2019 base sample: 143)	56%	↔
Bristol Water (2019 base sample: 280)	61%	↑
Cambridge Water (2019 base sample: 137)	54%	↔
Essex & Suffolk Water (2019 base sample: 137)	53%	↔
Hartlepool Water (2019 base sample: 138)	62%	↑
Portsmouth Water (2019 base sample: 282)	46%	↔
South East Water (2019 base sample: 328)	46%	↔
South Staffs Water (2019 base sample: 145)	39%	↓
SES Water (2019 base sample: 130)	52%	↔

Figure 22 details the main reasons (unprompted) why respondents gave their rating, with the main positive and negative comments shown at a total level.

Figure 22 Reasons for rating how well communicate on services and plans



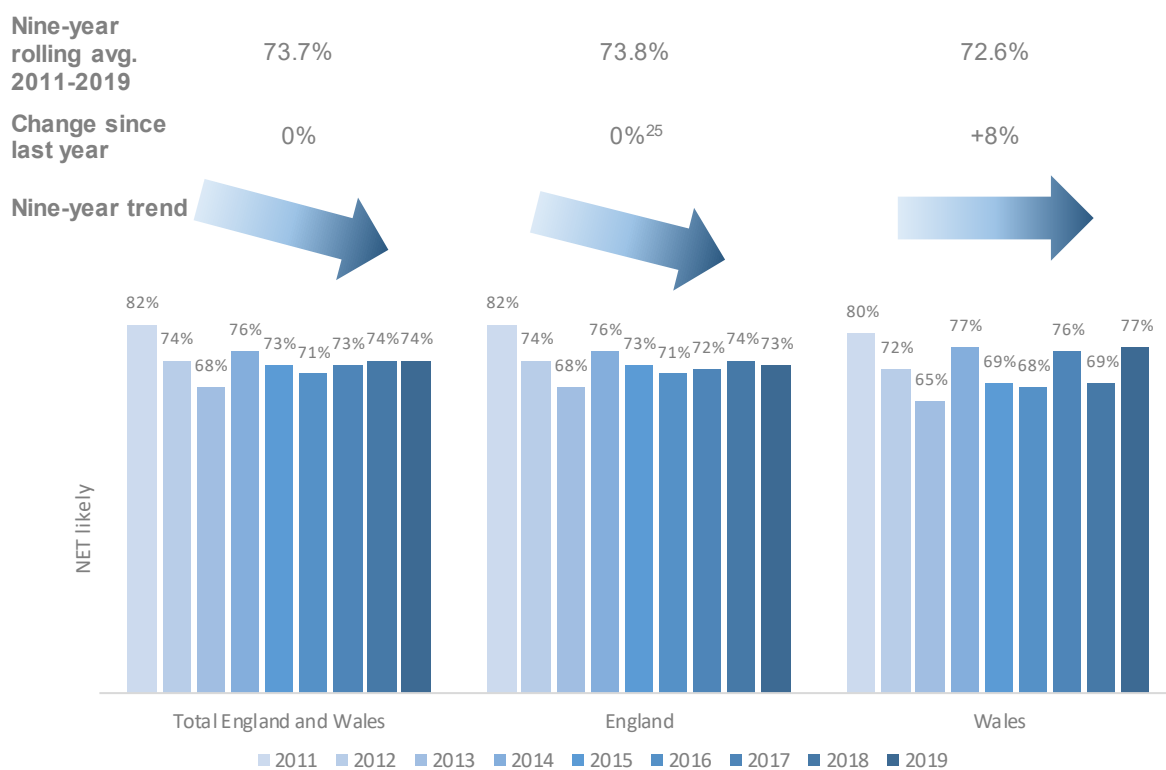
Chapter 4: Contacting water companies and satisfaction with customer service

This chapter presents views on 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 this survey, identifying the reason for contact and satisfaction with elements of the contact and overall satisfaction with customer services in general.

4.1 Likelihood of making contact with the company if worried about paying the bill

Respondents were asked how likely they would be to contact their water company if they were worried about paying a bill. Figure 23 shows likelihood at national levels, and Table 28 and Table 29 show this for each WaSC and for each WoC respectively.

Figure 23: Likelihood of contacting water/sewerage company if worried about a bill



²⁵ Change from 2018 to 2019 is less than 1% at 0 decimal places (2018 displayed figure is 74% but is actually 73.8%; 2019 displayed figure is 73% but is actually 73.4%). Actual change is 0.4%.

Table 28: Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

Likely to contact if worried about bill	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	73.7%	<p>82% 74% 68% 76% 73% 71% 73% 74% 74%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	n/a	0%
Total WaSCs (2019 base sample: 4003)	73.7%	<p>83% 74% 67% 76% 72% 71% 72% 74% 73%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	73%	0%
Anglian Water (2019 base sample: 400)	75.3%	<p>87% 73% 68% 78% 77% 74% 72% 77% 74%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-3%
Dŵr Cymru Welsh Water (2019 base sample: 400)	72.3%	<p>80% 72% 64% 77% 68% 68% 76% 68% 78%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+10%
Hafren Dyfrdwy (2019 base sample: 200)	75.9%	<p>80% 72%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	-8%
Northumbrian Water (2019 base sample: 200)	72.0%	<p>82% 69% 66% 77% 66% 75% 71% 69% 71%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	+2%
Severn Trent (2019 base sample: 701)	74.7%	<p>84% 77% 70% 78% 75% 71% 75% 67% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	+9%
South West Water (2019 base sample: 200)	75.9%	<p>85% 81% 74% 75% 74% 69% 80% 73% 73%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	0%
Southern Water (2019 base sample: 401)	76.4%	<p>87% 78% 73% 81% 77% 65% 72% 79% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-4%
Thames Water (2019 base sample: 200)	71.2%	<p>81% 75% 62% 72% 68% 72% 65% 79% 68%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-11%

United Utilities (2019 base sample: 700)	73.3%	<p>Year</p>	↔	↔	0%
Wessex Water (2019 base sample: 200)	76.2%	<p>Year</p>	↓	↔	+4%
Yorkshire Water (2019 base sample: 401)	74.2%	<p>Year</p>	↔	↔	-2%

Table 29: Likelihood of contacting water company if worried about a bill – WoCs

Likely to contact if worried about bill	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	73.7%	<p>Year</p>	↓	n/a	0%
Total WoCs (2019 base sample: 2307)	73.9%	<p>Year</p>	↓	74%	+2%
Affinity Water Central (2019 base sample: 150)	71.1%	<p>Year</p>	↔	↔	+1%
Affinity Water East (2019 base sample: 151)	74.3%	<p>Year</p>	↔	↔	+3%
Affinity Water South East (2019 base sample: 151)	74.2%	<p>Year</p>	↓	↔	+4%
Bournemouth Water (2019 base sample: 152)	76.3%	<p>Year</p>	↔	↑	+5%
Bristol Water (2019 base sample: 300)	73.4%	<p>Year</p>	↓	↔	-4%

Cambridge Water (2019 base sample: 150)	73.2%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>78%</td><td>73%</td><td>67%</td><td>79%</td><td>73%</td><td>68%</td><td>71%</td><td>74%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	78%	73%	67%	79%	73%	68%	71%	74%	76%	↔	↔	+1%
Year	11	12	13	14	15	16	17	18	19																
Percentage	78%	73%	67%	79%	73%	68%	71%	74%	76%																
Essex & Suffolk Water (2019 base sample: 150)	74.5%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>80%</td><td>71%</td><td>69%</td><td>74%</td><td>76%</td><td>73%</td><td>74%</td><td>75%</td><td>79%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	80%	71%	69%	74%	76%	73%	74%	75%	79%	↔	↔	+3%
Year	11	12	13	14	15	16	17	18	19																
Percentage	80%	71%	69%	74%	76%	73%	74%	75%	79%																
Hartlepool Water (2019 base sample: 150)	75.1%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>83%</td><td>73%</td><td>79%</td><td>77%</td><td>77%</td><td>73%</td><td>65%</td><td>78%</td><td>70%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	83%	73%	79%	77%	77%	73%	65%	78%	70%	↓	↔	-8%
Year	11	12	13	14	15	16	17	18	19																
Percentage	83%	73%	79%	77%	77%	73%	65%	78%	70%																
Portsmouth Water (2019 base sample: 301)	75.2%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>81%</td><td>73%</td><td>66%</td><td>83%</td><td>73%</td><td>73%</td><td>78%</td><td>77%</td><td>75%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	81%	73%	66%	83%	73%	73%	78%	77%	75%	↔	↔	-2%
Year	11	12	13	14	15	16	17	18	19																
Percentage	81%	73%	66%	83%	73%	73%	78%	77%	75%																
South East Water (2019 base sample: 350)	75.7%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>82%</td><td>79%</td><td>71%</td><td>76%</td><td>74%</td><td>73%</td><td>76%</td><td>74%</td><td>76%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	82%	79%	71%	76%	74%	73%	76%	74%	76%	↓	↔	+1%
Year	11	12	13	14	15	16	17	18	19																
Percentage	82%	79%	71%	76%	74%	73%	76%	74%	76%																
South Staffs Water (2019 base sample: 152)	76.7%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>80%</td><td>76%</td><td>80%</td><td>82%</td><td>80%</td><td>74%</td><td>81%</td><td>77%</td><td>73%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	80%	76%	80%	82%	80%	74%	81%	77%	73%	↓	↔	+6%
Year	11	12	13	14	15	16	17	18	19																
Percentage	80%	76%	80%	82%	80%	74%	81%	77%	73%																
SES Water (2019 base sample: 150)	70.1%	<table><tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><th>Percentage</th><td>78%</td><td>71%</td><td>68%</td><td>70%</td><td>64%</td><td>64%</td><td>71%</td><td>66%</td><td>79%</td></tr></table>	Year	11	12	13	14	15	16	17	18	19	Percentage	78%	71%	68%	70%	64%	64%	71%	66%	79%	↔	↔	+13%
Year	11	12	13	14	15	16	17	18	19																
Percentage	78%	71%	68%	70%	64%	64%	71%	66%	79%																

4.2 Prevalence of customers contacting their water company

Respondents were asked whether or not they had contacted their water/sewerage company in the last 12 months. Figure 24 shows contact trends for England and Wales and for each nation. This is followed by contact trends for each WaSC in Table 30, and for each WoC in Table 31.

Figure 24: Contact with the water/sewerage company

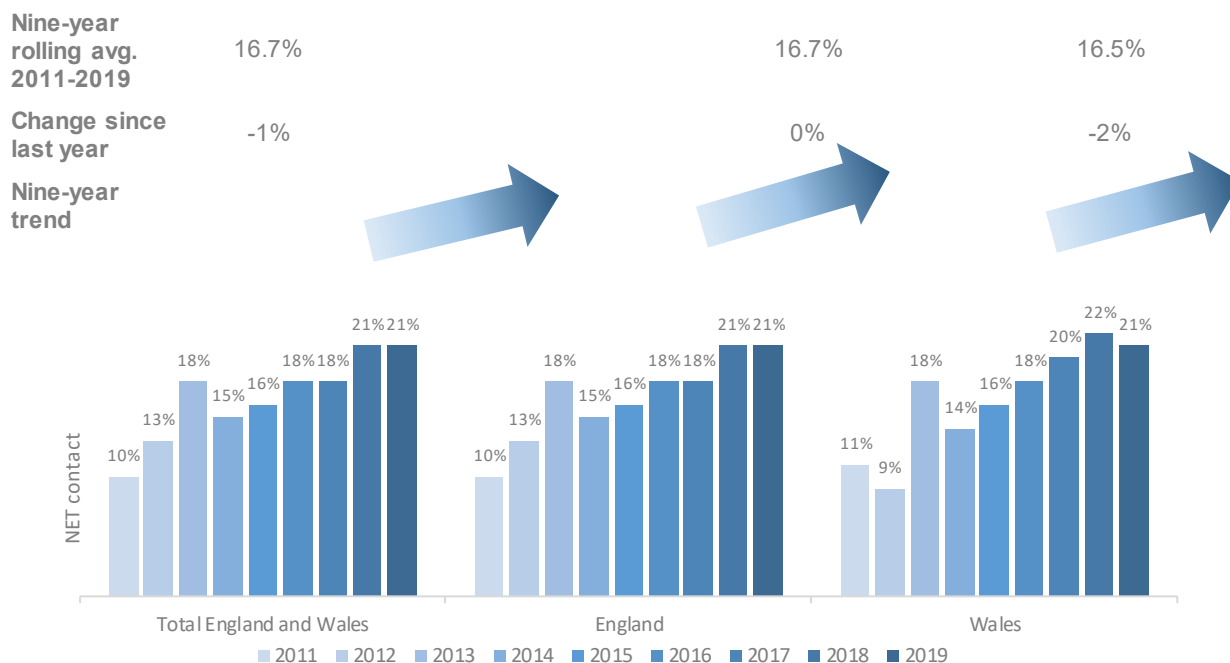


Table 30: Contact with the water/sewerage company - WaSCs

Contact with your water and/or sewerage company	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	16.7%		↑	n/a	-1%
Total WaSCs (2019 base sample: 4003)	16.7%		↑	20%	-2%
Anglian Water (2019 base sample: 400)	19.2%		↑	↔	0%
Dŵr Cymru Welsh Water (2019 base sample: 400)	16.3%		↑	↔	-2%


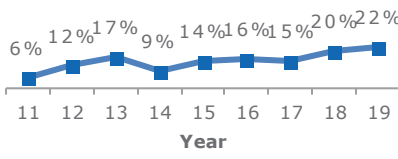
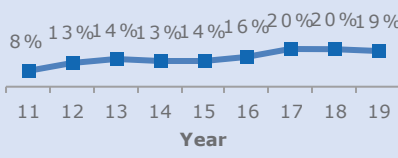
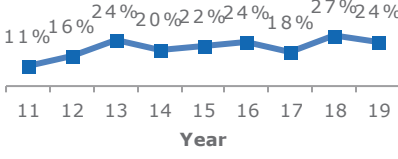

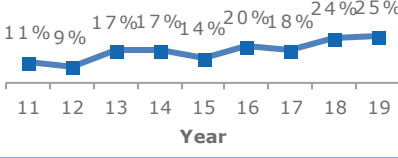
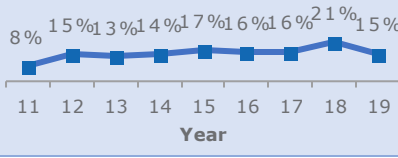
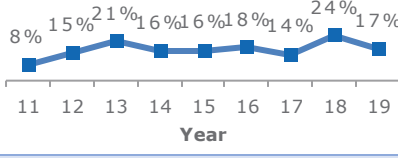
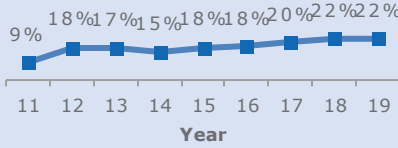
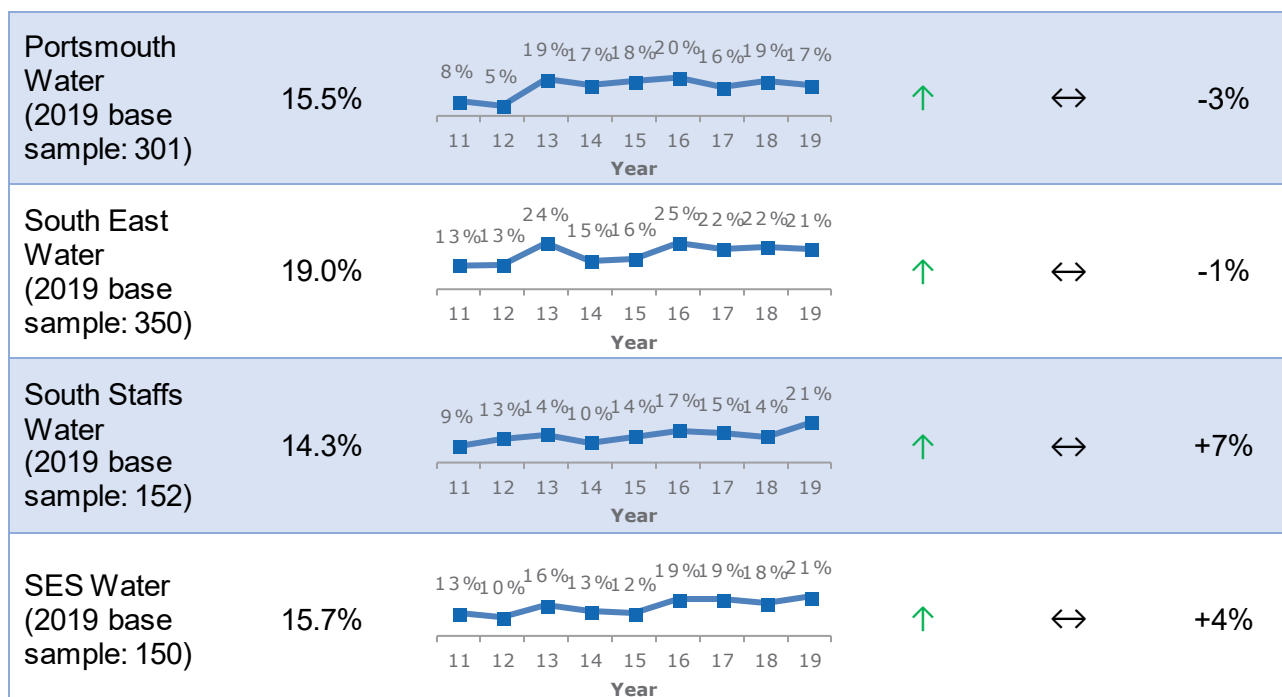
Hafren Dyfrdwy (2019 base sample: 200)	24.1%	 <p>23% 25%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	+2%
Northumbrian Water (2019 base sample: 200)	14.4%	 <p>6% 12% 17% 9% 14% 16% 15% 20% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+2%
Severn Trent (2019 base sample: 701)	15.4%	 <p>8% 13% 14% 13% 14% 16% 20% 20% 19%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-1%
South West Water (2019 base sample: 200)	20.6%	 <p>11% 16% 24% 20% 22% 24% 18% 27% 24%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-3%
Southern Water (2019 base sample: 401)	18.5%	 <p>10% 11% 19% 14% 26% 26% 19% 23% 18%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-5%
Thames Water (2019 base sample: 200)	17.2%	 <p>11% 9% 17% 17% 14% 20% 18% 24% 25%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+1%
United Utilities (2019 base sample: 700)	14.9%	 <p>8% 15% 13% 14% 17% 16% 16% 21% 15%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	-6%
Wessex Water (2019 base sample: 200)	16.5%	 <p>8% 15% 21% 16% 16% 18% 14% 24% 17%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-6%
Yorkshire Water (2019 base sample: 401)	17.6%	 <p>9% 18% 17% 15% 18% 18% 20% 22% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	0%

Table 31: Contact with the water company – WoCs

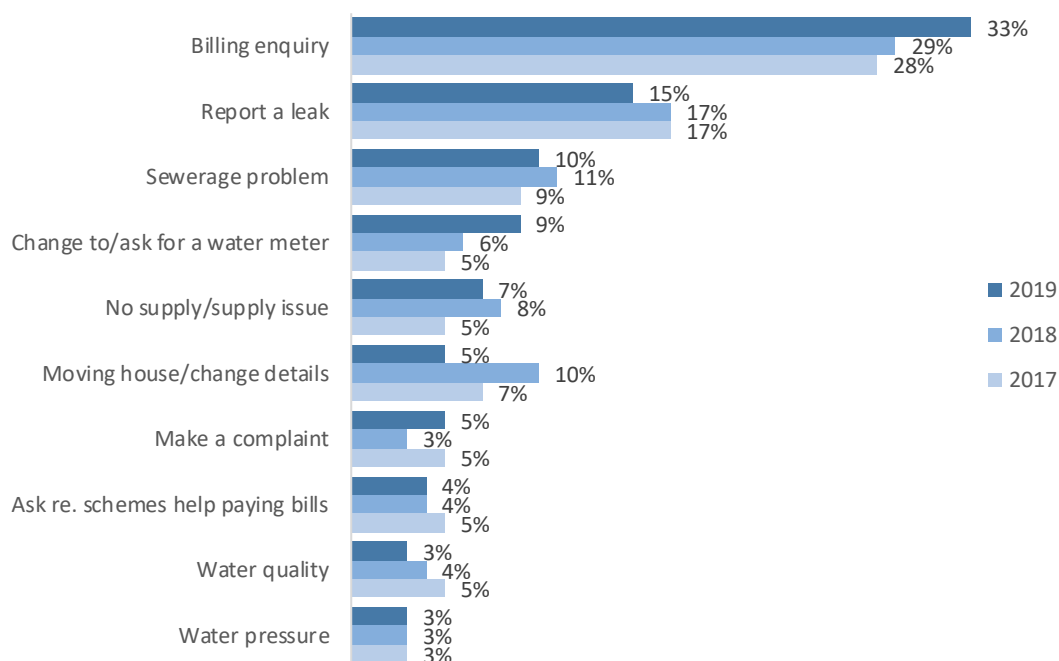
Contact with your water and/or sewerage company	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	16.7%	<p>10% 13% 18% 15% 16% 18% 18% 21% 21%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	n/a	-1%
Total WoCs (2019 base sample: 2307)	16.5%	<p>9% 13% 19% 15% 15% 19% 18% 19% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	22%	+3%
Affinity Water Central (2019 base sample: 150)	16.6%	<p>6% 17% 20% 15% 13% 17% 16% 17% 27%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+10%
Affinity Water East (2019 base sample: 151)	16.3%	<p>11% 18% 19% 11% 16% 19% 14% 21% 21%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	0%
Affinity Water South East (2019 base sample: 151)	19.2%	<p>13% 13% 25% 19% 21% 17% 26% 19% 19%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-1%
Bournemouth Water (2019 base sample: 152)	14.8%	<p>9% 11% 16% 15% 16% 15% 17% 24% 12%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↓	-12%
Bristol Water (2019 base sample: 300)	15.3%	<p>10% 9% 19% 13% 17% 17% 20% 15% 17%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+2%
Cambridge Water (2019 base sample: 150)	16.6%	<p>9% 13% 21% 19% 10% 18% 20% 21% 18%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-3%
Essex & Suffolk Water (2019 base sample: 150)	16.4%	<p>10% 13% 18% 17% 15% 16% 19% 19% 22%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+3%
Hartlepool Water (2019 base sample: 150)	17.3%	<p>8% 12% 22% 13% 11% 25% 19% 20% 26%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+6%



4.3 Reason for making contact with the water company

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

Figure 25: Reason for contact



Footnote: Reasons for contact below 3% for 2019, are not shown.

4.4 Satisfaction with different aspects of contact

Respondents who made contact in the last 12 months were asked to rate their satisfaction with five different aspects of contact handling – ease of contact, quality of information, knowledge of staff, the feeling that the contact would be resolved and how well the company kept them informed of progress. Figure 26 and Figure 27 show national trends for the last nine-years for each aspect of contact. This is followed by Figure 28 which compares 2019 satisfaction between England and Wales, Table 32 and Table 33 which show 2019 satisfaction with aspects of service for each WaSC and each WoC respectively, and Table 34 and Table 35 which highlight the nine-year trends by WaSC and by WoC.

Figure 26: Satisfaction with aspects of contact

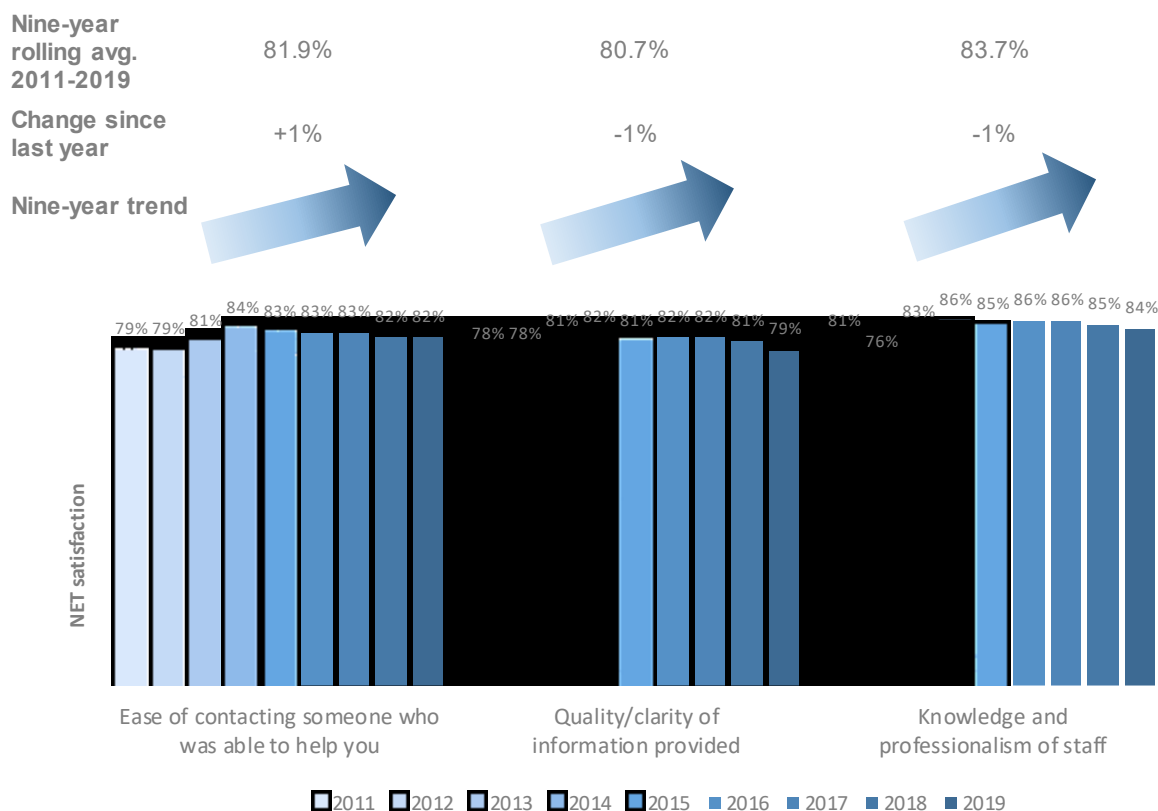


Figure 27: Satisfaction with aspects of contact

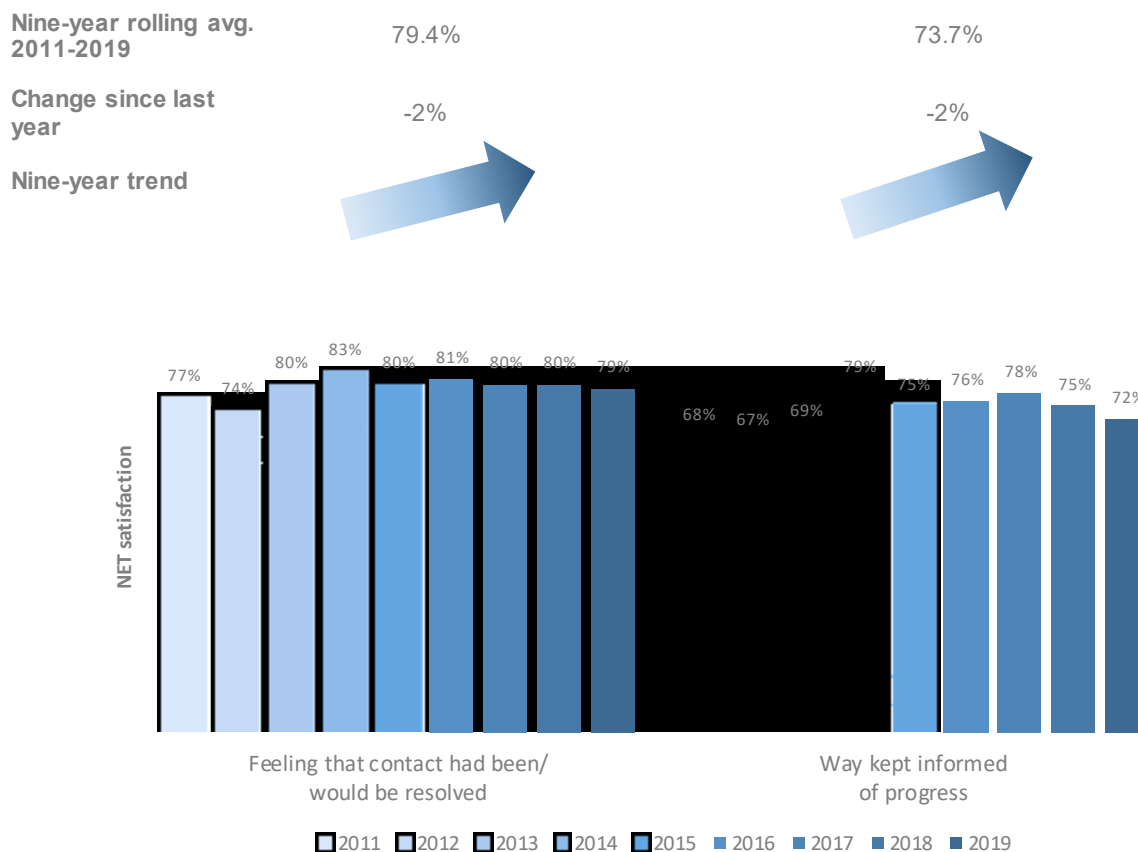
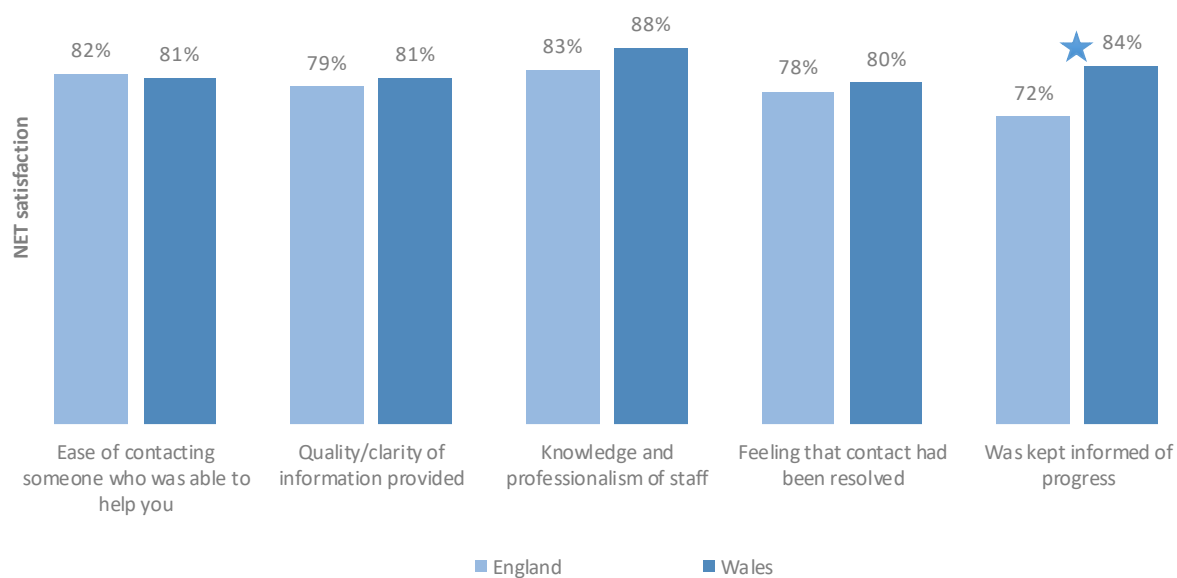


Figure 28: Satisfaction with aspects of contact by nation.



★ Significant difference between England and Wales 2019

Table 32: Satisfaction with aspects of contact in 2019 – WaSCs

Satisfaction with aspects of contact (2019 data only)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professionalism of staff	Feeling that contact had been / would be resolved	Was kept informed of progress
Industry (2019 base range: 1111-1211)	82%	79%	84%	79%	72%
Total WaSCs (2019 base range: 718-765)	83%	79%	83%	78%	73%
Anglian Water (2019 base range: 76-82)	86%	89%	91%	89%	83%
Dŵr Cymru Welsh Water (2019 base range: 73-78)	81%	80%	88%	79%	84%
Hafren Dyfrdwy (2019 base range: 42-49)	86%	83%	90%	85%	83%
Northumbrian Water (2019 base range: 36-40)	88%	70%	82%	79%	72%
Severn Trent (2019 base range: 121-132)	86%	83%	89%	81%	76%
South West Water (2019 base range: 45-47)	89%	79%	82%	74%	78%
Southern Water (2019 base range: 66-69)	67%	67%	77%	73%	63%
Thames Water (2019 base range: 44-50)	77%	66%	68%	66%	56%
United Utilities (2019 base range: 96-103)	88%	89%	94%	88%	85%
Wessex Water (2019 base range: 30-34)	85%	88%	82%	84%	77%
Yorkshire Water (2019 base range: 83-87)	82%	86%	83%	80%	76%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 33: Satisfaction with aspects of contact 2019 – WoCs

Satisfaction with aspects of contact (2019 data only)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professionalism of staff	Feeling that contact had been / would be resolved	Was kept informed of progress
Industry (2019 base range: 1111-1211)	82%	79%	84%	79%	72%
Total WoCs (2019 base range: 393-450)	81%	81%	86%	79%	71%
Affinity Water Central (2019 base range: 35-41)	73%	80%	85%	78%	66%
Affinity Water East (2019 base range: 26-31)	74%	74%	86%	90%	69%
Affinity Water South East (2019 base range: 23-28)	82%	88%	85%	71%	70%
Bournemouth Water (2019 base range: 16-18)	89%	78%	89%	72%	81%
Bristol Water (2019 base range: 44-51)	96%	92%	89%	88%	84%
Cambridge Water (2019 base range: 25-27)	70%	81%	88%	85%	64%
Essex & Suffolk Water (2019 base range: 28-32)	94%	94%	97%	91%	86%
Hartlepool Water (2019 base range: 34-39)	85%	79%	82%	85%	79%
Portsmouth Water (2019 base range: 45-50)	78%	71%	78%	76%	71%
South East Water (2019 base range: 62-72)	83%	75%	79%	75%	69%
South Staffs Water (2019 base range: 27-32)	78%	72%	87%	71%	63%
SES Water (2019 base range: 28-31)	84%	77%	87%	73%	54%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 34: Satisfaction with aspects of contact – WaSC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of contact (Nine-year trend arrow)	Ease of contacting someone who was able to help you		Quality / clarity of information provided		Knowledge and professional-ism of staff		Feeling that contact had been / would be resolved		Was kept informed of progress	
Industry (2019 base range: 1111-1211)	↑	81.9%	↑	80.7%	↑	83.7%	↑	79.4%	↑	73.7%
Total WaSCs (2019 base range: 718-765)	↑	81.6%	↔	80.7%	↑	83.4%	↔	79.4%	↑	73.6%
Anglian Water (2019 base range: 76-82)	↑	81.7%	↑	83.2%	↑	84.8%	↑	81.8%	↑	73.0%
Dŵr Cymru Welsh Water (2019 base range: 73-78)	↓	88.2%	↓	84.2%	↔	87.4%	↓	84.2%	↑	78.9%
Northumbrian Water (2019 base range: 36-40)	↔	85.2%	↓	83.3%	↓	88.5%	↓	82.4%	↔	71.9%
Severn Trent (2019 base range: 121-132)	↑	85.6%	↑	85.0%	↑	88.8%	↔	81.5%	↑	76.6%
South WestWater (2019 base range: 45-47)	↑	83.0%	↑	79.1%	↑	84.7%	↑	79.4%	↑	73.6%
Southern Water (2019 base range: 66-69)	↔	76.1%	↓	73.3%	↔	77.1%	↓	73.1%	↓	63.9%
Thames Water (2019 base range: 44-50)	↓	74.2%	↔	71.4%	↔	75.1%	↔	73.3%	↔	66.4%
United Utilities (2019 base range: 96-103)	↑	80.0%	↑	82.6%	↑	82.8%	↑	79.6%	↑	77.0%
WessexWater (2019 base range: 30-34)	↔	88.8%	↔	85.4%	↔	88.1%	↓	85.7%	↔	81.5%
Yorkshire Water (2019 base range: 83-87)	↓	85.0%	↔	85.1%	↔	86.1%	↔	81.7%	↔	78.6%

Table 35: Satisfaction with aspects of contact – WoC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of contact (Nine-year trend arrow)	Ease of contacting someone who was able to help you		Quality / clarity of information provided		Knowledge and professional-ism of staff		Feeling that contact had been/would be resolved		Was kept informed of progress	
Industry (2019 base range: 1111-1211)	↑	81.9%	↑	80.7%	↑	83.7%	↑	79.4%	↑	73.7%
Total WoCs (2019 base range: 393-450)	↔	83.2%	↔	80.8%	↔	84.7%	↔	79.7%	↔	73.9%
Affinity Water Central (2019 base range: 35-41)	↓	80.9%	↔	78.8%	↔	84.7%	↔	79.2%	↔	70.8%
Affinity Water East (2019 base range: 26-31)	↔	82.1%	↔	77.4%	↑	82.9%	↔	80.1%	↑	74.6%
Affinity Water South East (2019 base range: 23-28)	↔	77.3%	↔	75.9%	↑	80.5%	↔	69.8%	↔	70.5%
Bournemouth Water (2019 base range: 16-18)	↓	87.6%	↓	84.7%	↔	87.3%	↓	80.4%	↓	75.5%
Bristol Water (2019 base range: 44-51)	↔	86.8%	↔	85.5%	↑	87.8%	↔	81.5%	↑	77.6%
Cambridge Water (2019 base range: 25-27)	↓	82.0%	↔	82.6%	↓	86.1%	↓	82.7%	↓	76.0%
Essex & Suffolk Water (2019 base range: 28-32)	↑	86.8%	↑	86.0%	↑	88.6%	↑	84.4%	↔	80.6%
Hartlepool Water (2019 base range: 34-39)	↔	89.0%	↓	89.9%	↔	90.8%	↓	90.8%	↓	83.6%
Portsmouth Water (2019 base range: 45-50)	↔	85.6%	↔	83.2%	↔	86.1%	↔	86.5%	↓	79.4%
South East Water (2019 base range: 62-72)	↑	80.6%	↑	75.7%	↔	78.7%	↔	73.8%	↑	68.0%
South Staffs Water (2019 base range: 27-32)	↓	83.7%	↓	81.6%	↓	86.8%	↓	79.4%	↔	76.0%
SES Water (2019 base range: 28-31)	↑	84.1%	↔	79.7%	↑	82.6%	↔	80.2%	↔	71.6%

4.5 Overall satisfaction with water company contact handling

After rating their satisfaction across the aspects of contact handling, respondents were asked how satisfied they were overall with the way their water company dealt with their contact. Figure 29 shows the nine-year trend for overall satisfaction with contact for England and Wales and for each nation. This is followed by Table 36 and Table 37 which show satisfaction by each WaSC and each WoC in turn.

Figure 29: Overall satisfaction with water company contact handling

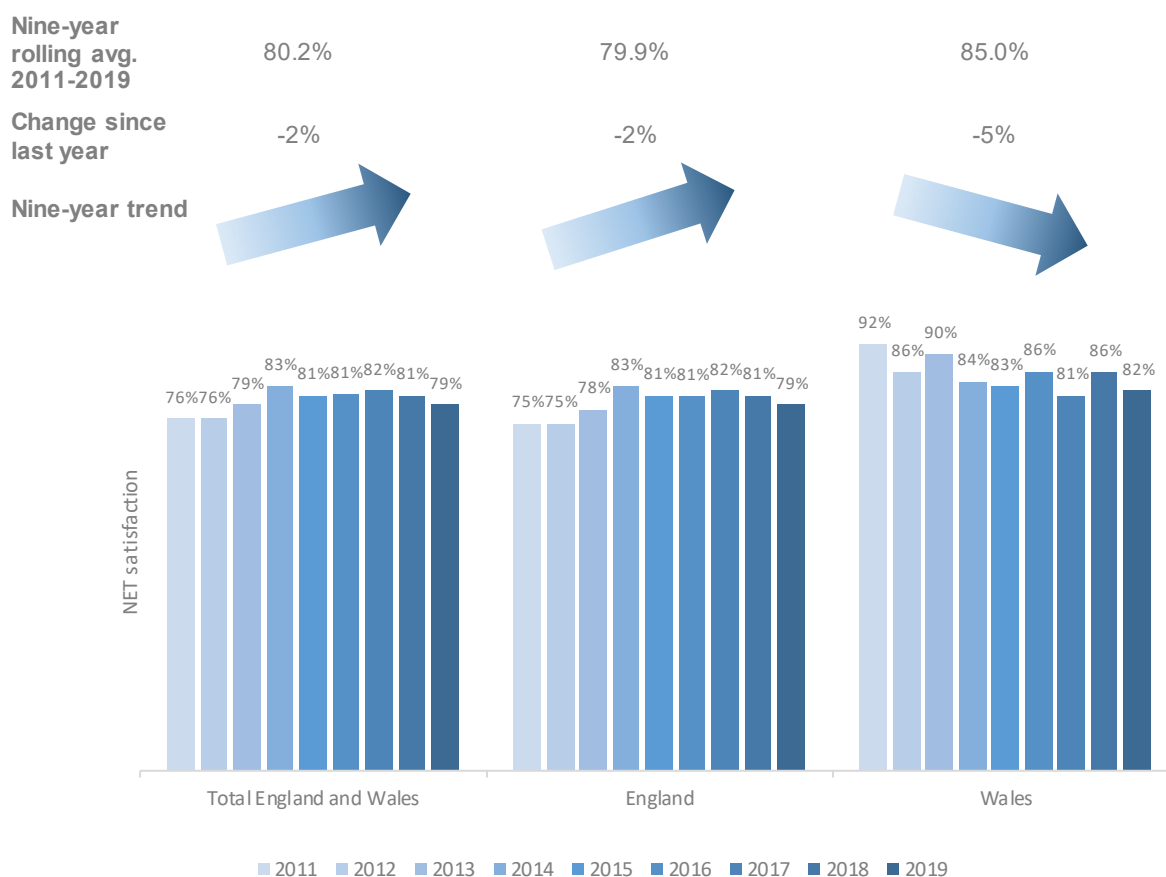


Table 36: Overall satisfaction with water company contact handling – WaSCs

Satisfaction with contact handling	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 1235)	80.2%		↑	n/a	-2%
Total WaSCs (2019 base sample: 780)	80.2%		↑	80%	-3%
Anglian Water (2019 base sample: 83)	82.8%		↑	↔	0%

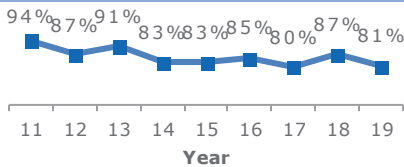

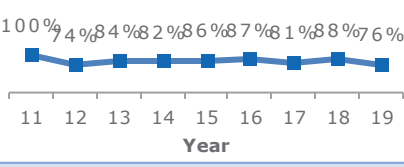
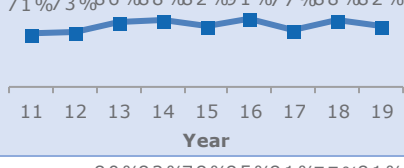
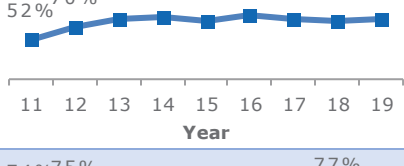
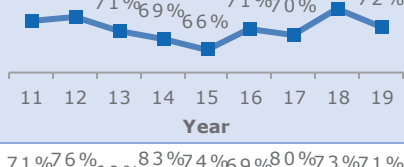
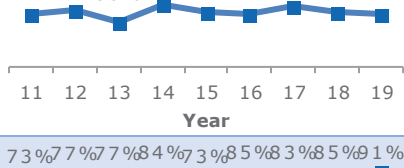
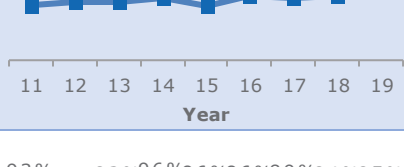
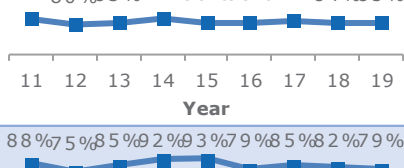

Dŵr Cymru Welsh Water (2019 base sample: 80)	85.2%	 <p>94% 87% 91% 83% 83% 85% 80% 87% 81%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-6%
Hafren Dyfrdwy (2019 base sample: 49)	80.8%	 <p>73% 88%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	n/a	↔	+15%
Northumbrian Water (2019 base sample: 42)	83.3%	 <p>100% 94% 84% 82% 86% 87% 81% 88% 76%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-12%
Severn Trent (2019 base sample: 134)	82.9%	 <p>71% 73% 86% 88% 82% 89% 77% 88% 82%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	-5%
South West Water (2019 base sample: 47)	78.0%	 <p>52% 70% 80% 82% 78% 85% 81% 77% 81%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↔	+4%
Southern Water (2019 base sample: 71)	71.4%	 <p>74% 75% 71% 69% 66% 71% 70% 77% 72%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-5%
Thames Water (2019 base sample: 49)	72.9%	 <p>71% 76% 60% 83% 67% 64% 69% 80% 73% 71%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-1%
United Utilities (2019 base sample: 104)	81.6%	 <p>73% 77% 77% 84% 73% 85% 83% 85% 91%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↑	↑	+6%
Wessex Water (2019 base sample: 34)	86.5%	 <p>93% 80% 83% 96% 86% 86% 89% 84% 85%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+1%
Yorkshire Water (2019 base sample: 87)	83.6%	 <p>88% 75% 85% 92% 93% 79% 85% 82% 79%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-2%

Table 37: Overall satisfaction with water company contact handling – WoCs

Satisfaction with contact handling	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year																				
Industry (2019 base sample: 1235)	80.2%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>76%</td><td>76%</td><td>79%</td><td>83%</td><td>81%</td><td>81%</td><td>82%</td><td>81%</td><td>79%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	76%	76%	79%	83%	81%	81%	82%	81%	79%	↑	n/a	-2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	76%	76%	79%	83%	81%	81%	82%	81%	79%																
Total WoCs (2019 base sample: 455)	80.2%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>79%</td><td>73%</td><td>82%</td><td>75%</td><td>85%</td><td>82%</td><td>84%</td><td>79%</td><td>78%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	79%	73%	82%	75%	85%	82%	84%	79%	78%	↔	78%	-1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	79%	73%	82%	75%	85%	82%	84%	79%	78%																
Affinity Water Central (2019 base sample: 41)	78.2%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>73%</td><td>79%</td><td>83%</td><td>73%</td><td>83%</td><td>77%</td><td>79%</td><td>72%</td><td>73%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	73%	79%	83%	73%	83%	77%	79%	72%	73%	↔	↔	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	73%	79%	83%	73%	83%	77%	79%	72%	73%																
Affinity Water East (2019 base sample: 31)	80.6%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>82%</td><td>76%</td><td>79%</td><td>87%</td><td>87%</td><td>79%</td><td>90%</td><td>73%</td><td>87%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	82%	76%	79%	87%	87%	79%	90%	73%	87%	↔	↔	+14%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	82%	76%	79%	87%	87%	79%	90%	73%	87%																
Affinity Water South East (2019 base sample: 28)	73.8%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>65%</td><td>79%</td><td>74%</td><td>71%</td><td>68%</td><td>77%</td><td>68%</td><td>86%</td><td>79%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	65%	79%	74%	71%	68%	77%	68%	86%	79%	↔	↔	-7%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	65%	79%	74%	71%	68%	77%	68%	86%	79%																
Bournemouth Water (2019 base sample: 18)	82.9%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>91%</td><td>75%</td><td>96%</td><td>86%</td><td>84%</td><td>95%</td><td>76%</td><td>72%</td><td>78%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	91%	75%	96%	86%	84%	95%	76%	72%	78%	↓	↔	+6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	91%	75%	96%	86%	84%	95%	76%	72%	78%																
Bristol Water (2019 base sample: 52)	83.7%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>79%</td><td>57%</td><td>88%</td><td>77%</td><td>92%</td><td>84%</td><td>86%</td><td>90%</td><td>85%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	79%	57%	88%	77%	92%	84%	86%	90%	85%	↑	↔	-6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	79%	57%	88%	77%	92%	84%	86%	90%	85%																
Cambridge Water (2019 base sample: 27)	82.2%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>100%</td><td>94%</td><td>77%</td><td>86%</td><td>100%</td><td>95%</td><td>73%</td><td>91%</td><td>78%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	100%	94%	77%	86%	100%	95%	73%	91%	78%	↓	↔	-13%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	100%	94%	77%	86%	100%	95%	73%	91%	78%																
Essex & Suffolk Water (2019 base sample: 32)	82.8%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>77%</td><td>72%</td><td>82%</td><td>68%</td><td>91%</td><td>79%</td><td>91%</td><td>90%</td><td>87%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	77%	72%	82%	68%	91%	79%	91%	90%	87%	↑	↔	-2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	77%	72%	82%	68%	91%	79%	91%	90%	87%																
Hartlepool Water (2019 base sample: 39)	90.8%	<table><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr><tr><td>Satisfaction (%)</td><td>100%</td><td>100%</td><td>94%</td><td>95%</td><td>94%</td><td>92%</td><td>86%</td><td>87%</td><td>85%</td></tr></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	100%	100%	94%	95%	94%	92%	86%	87%	85%	↓	↔	-2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	100%	100%	94%	95%	94%	92%	86%	87%	85%																

Portsmouth Water (2019 base sample: 50)	84.5%	<p>100% 50%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	-10%
South East Water (2019 base sample: 73)	75.6%	<p>76% 60%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+3%
South Staffs Water (2019 base sample: 32)	83.9%	<p>92% 83%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↓	↔	-6%
SES Water (2019 base sample: 32)	79.0%	<p>85% 65%</p> <p>11 12 13 14 15 16 17 18 19</p> <p>Year</p>	↔	↔	+6%

4.6 Satisfaction with overall customer service

This question was first included in the 2016 Water Matters survey. It aims to understand customers' overall satisfaction with the customer services in the round, asking them to consider meter readings, bill provision and frequency, payment options and any other aspect of customer service before rating their satisfaction level with their water company. Figure 30 below shows national figures for the last four years. This is followed by company level figures in Table 38 and Table 39.

Figure 30: Satisfaction with overall customer service

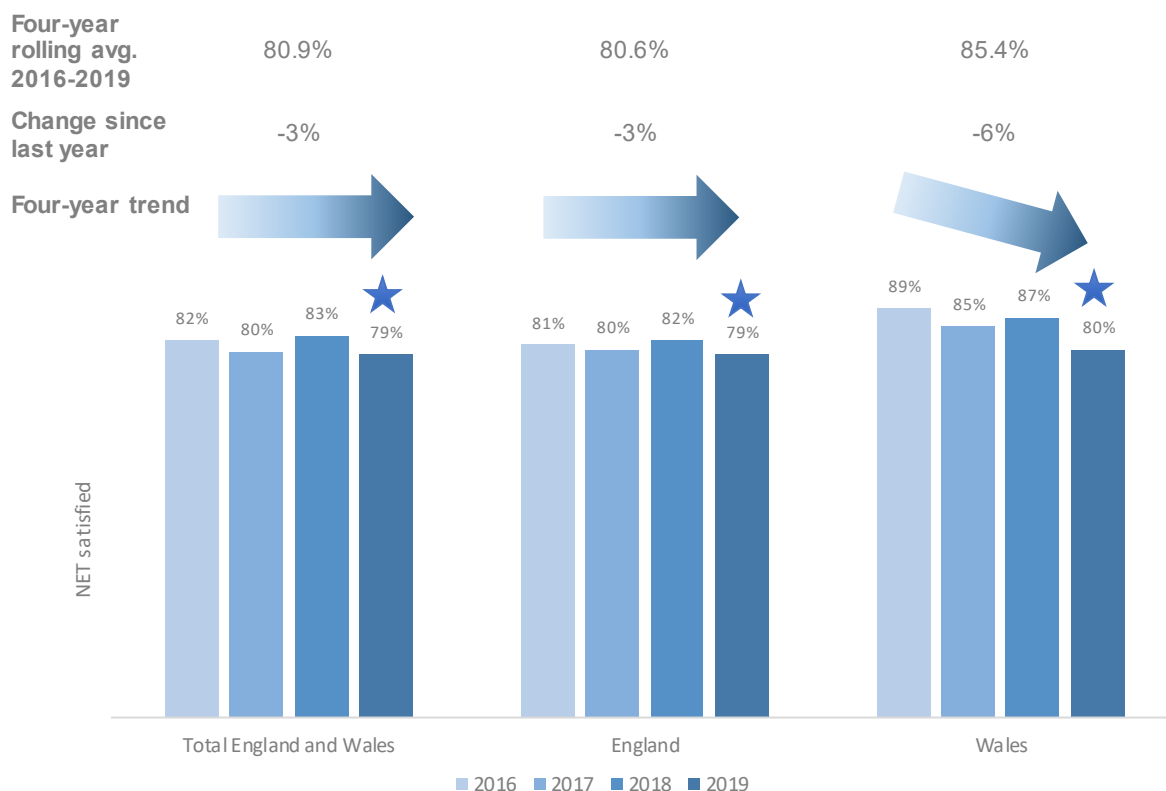


Table 38: Satisfaction with overall customer service – WaSCs

Satisfaction with overall customer service	Four-year rolling company average	Four-year company trend	Four-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	80.9%		↔	n/a	-3%
Total WaSCs (2019 base sample: 4003)	81.1%		↔	79%	-3%
Anglian Water (2019 base sample: 400)	80.5%		↔	↔	-4%

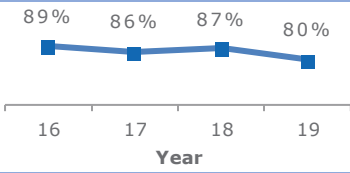
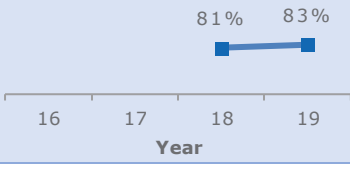
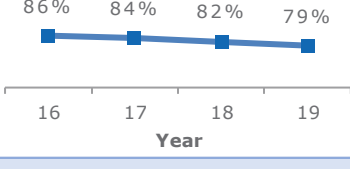



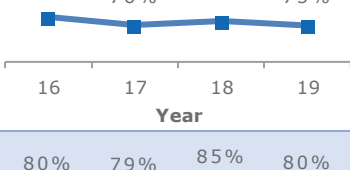
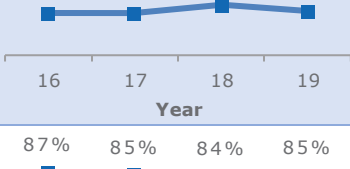
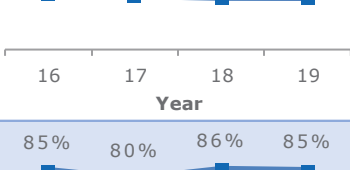

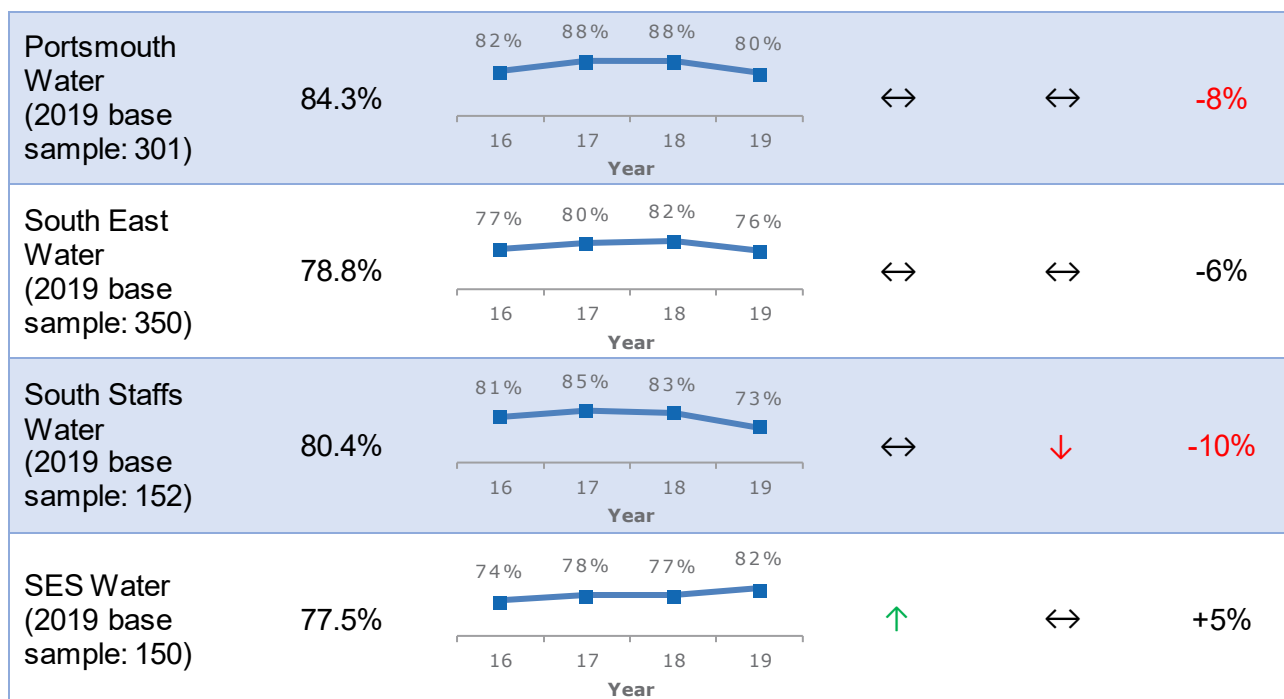
Dŵr Cymru Welsh Water (2019 base sample: 400)	85.6%	 <p>89% 86% 87% 80%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	-7%
Hafren Dyfrdwy (2019 base sample: 200)	82.0%	 <p>81% 83%</p> <p>16 17 18 19</p> <p>Year</p>	n/a	↔	+1%
Northumbrian Water (2019 base sample: 200)	82.8%	 <p>86% 84% 82% 79%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	-3%
Severn Trent (2019 base sample: 701)	81.8%	 <p>85% 79% 83% 80%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-3%
South West Water (2019 base sample: 200)	79.0%	 <p>81% 78% 80% 76%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-4%
Southern Water (2019 base sample: 401)	77.8%	 <p>78% 76% 81% 75%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-6%
Thames Water (2019 base sample: 200)	77.4%	 <p>81% 76% 78% 75%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	-3%
United Utilities (2019 base sample: 700)	81.1%	 <p>80% 79% 85% 80%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-4%
Wessex Water (2019 base sample: 200)	85.4%	 <p>87% 85% 84% 85%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↑	+1%
Yorkshire Water (2019 base sample: 401)	83.9%	 <p>85% 80% 86% 85%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	-1%

Table 39: Satisfaction with overall customer service – WoCs

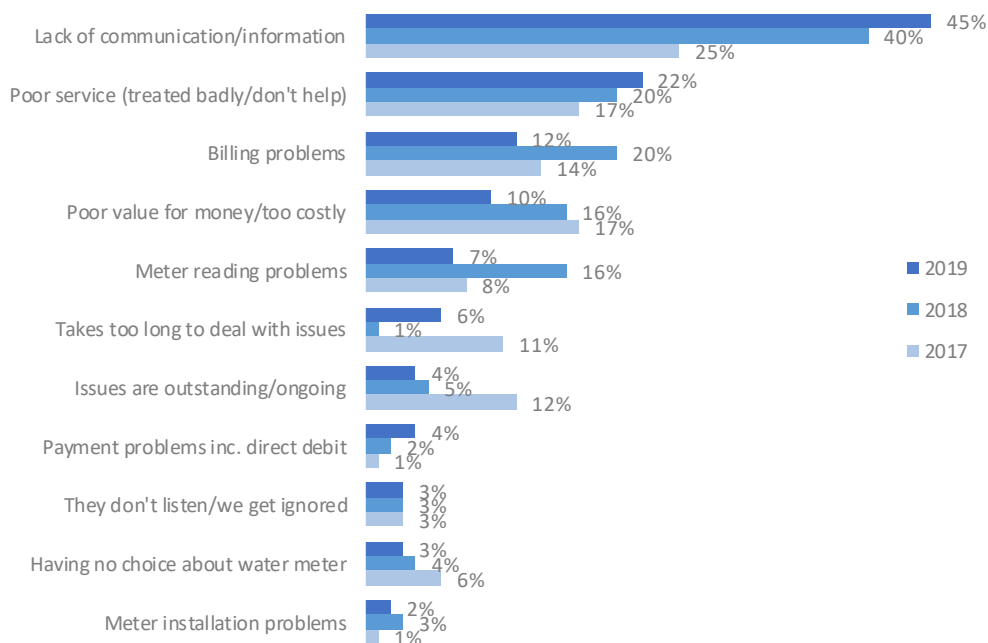
Satisfaction with overall customer service	Four-year rolling company average	Four-year company trend	Four-year trend	Company average vs WoC average	Change since last year
Industry (2019 base sample: 6310)	80.9%	<p>82% 80% 83% 79%</p> <p>16 17 18 19</p> <p>Year</p>	↔	n/a	-3%
Total WoCs (2019 base sample: 2307)	80.3%	<p>78% 81% 82% 81%</p> <p>16 17 18 19</p> <p>Year</p>	↔	81%	-1%
Affinity Water Central (2019 base sample: 150)	77.7%	<p>72% 77% 79% 83%</p> <p>16 17 18 19</p> <p>Year</p>	↑	↔	+4%
Affinity Water East (2019 base sample: 151)	82.6%	<p>83% 88% 77% 81%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+4%
Affinity Water South East (2019 base sample: 151)	81.2%	<p>80% 79% 83% 83%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	0%
Bournemouth Water (2019 base sample: 152)	86.3%	<p>88% 82% 90% 86%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-4%
Bristol Water (2019 base sample: 300)	84.0%	<p>80% 85% 87% 83%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-4%
Cambridge Water (2019 base sample: 150)	83.3%	<p>83% 81% 83% 85%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+2%
Essex & Suffolk Water (2019 base sample: 150)	80.5%	<p>80% 78% 81% 83%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+2%
Hartlepool Water (2019 base sample: 150)	88.3%	<p>89% 87% 88% 90%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	+2%



4.7 Reasons for dissatisfaction with overall customer services

Those who were dissatisfied with the overall customer services of their water company were asked their reason for their dissatisfaction. This is shown in Figure 31 below.

Figure 31: Reasons for dissatisfaction with customer services



Chapter 5: Views on water services

This chapter covers customer satisfaction with several aspects of the water supply service (reliability, colour and appearance, safety, pressure, taste and smell, and hardness/softness of tap water); it then presents overall satisfaction with water supply services.

This is followed by respondents' assessment of their confidence in the long-term supply of water, that is, without being subjected to restrictions such as hosepipe bans.

5.1 Satisfaction with aspects of water supply

Figure 32 and Figure 33 show the trends for national satisfaction with the reliability of water supplies, colour and appearance of tap water, the safety of tap water, water supply pressure, the taste and smell of tap water and the hardness/softness of tap water.

This is followed by Figure 34 which compares satisfaction between England and Wales in 2019,

Table 40 and

Table **41** which show satisfaction in 2019 for each WaSC and WoC respectively, and finally

Table 42 and Table 43 which highlight the nine-year trends for WaSCs and WoCs.

Figure 32: Satisfaction with aspects of water supply

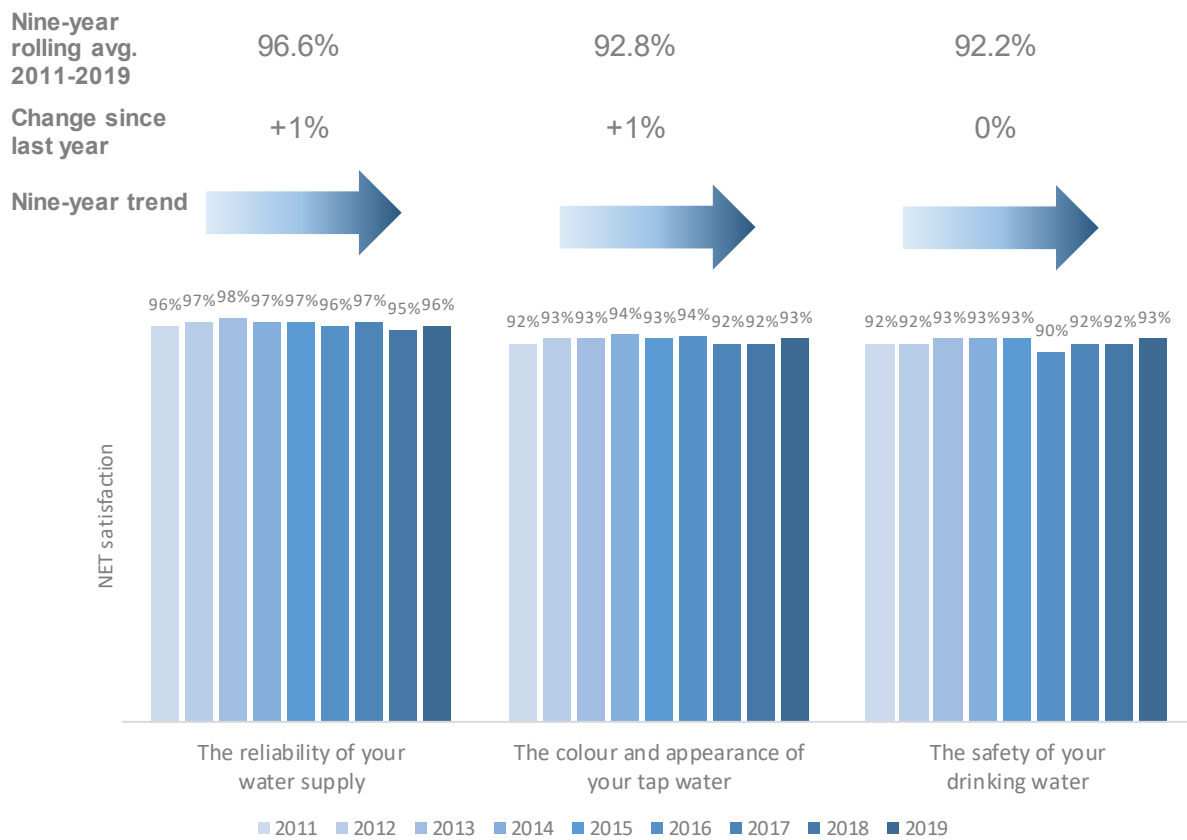
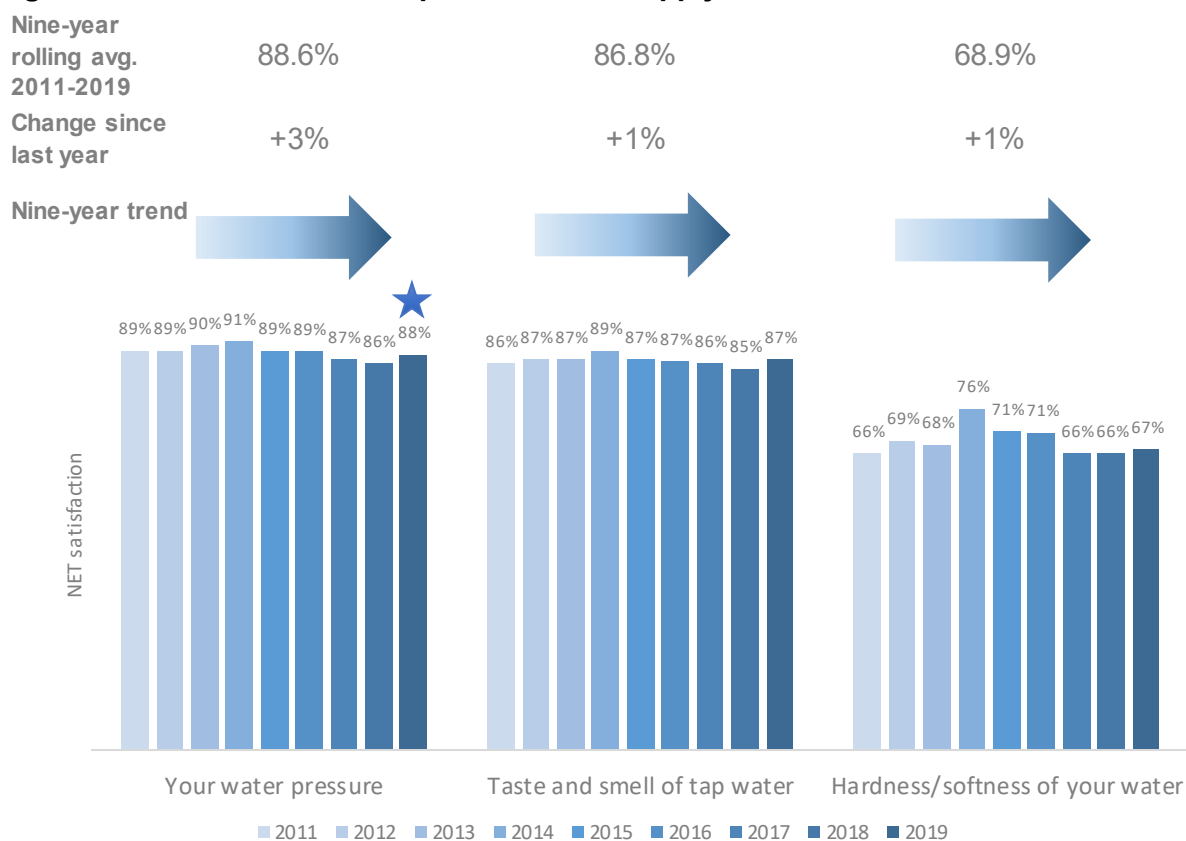
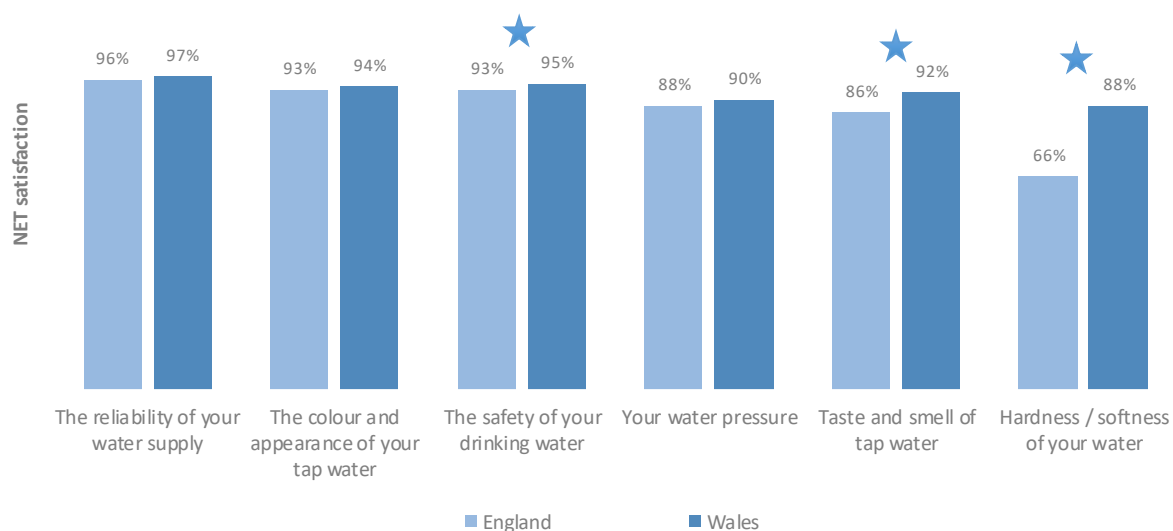


Figure 33: Satisfaction with aspects of water supply



★ Significant difference between 2018 and 2019 data.

Figure 34: Satisfaction with aspects of water supply by nation



★ Significant difference between England and Wales.

Table 40: Satisfaction with aspects of water supply in 2019 – WaSCs

Satisfaction with aspects of water supply (2019 data only)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2019 base sample: 6310)	96%	93%	93%	88%	87%	67%
Total WaSCs (2019 base sample: 4003)	96%	93%	93%	89%	87%	71%
Anglian Water (2019 base sample: 400)	96%	90%	91%	87%	81%	44%
Dŵr Cymru Welsh Water (2019 base sample: 400)	97%	94%	95%	90%	92%	88%
Hafren Dyfrdwy (2019 base sample: 200)	99%	94%	94%	90%	92%	92%
Northumbrian Water (2019 base sample: 200)	99%	97%	92%	93%	87%	85%
Severn Trent (2019 base sample: 701)	97%	94%	95%	89%	86%	72%
South West Water (2019 base sample: 200)	96%	92%	93%	87%	87%	86%
Southern Water (2019 base sample: 401)	97%	92%	92%	90%	88%	53%
Thames Water (2019 base sample: 200)	93%	92%	90%	85%	83%	53%
United Utilities (2019 base sample: 700)	96%	94%	94%	89%	90%	90%
Wessex Water (2019 base sample: 200)	97%	95%	96%	93%	85%	62%
Yorkshire Water (2019 base sample: 401)	98%	95%	96%	91%	91%	82%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 41: Satisfaction with aspects of water supply 2019 – WoCs

Satisfaction with aspects of water supply (2019 data only)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2019 base sample: 6310)	96%	93%	93%	88%	87%	67%
Total WoCs (2019 base sample: 2307)	97%	92%	93%	88%	86%	56%
Affinity Water Central (2019 base sample: 150)	97%	89%	90%	85%	85%	45%
Affinity Water East (2019 base sample: 151)	97%	93%	87%	80%	82%	47%
Affinity Water South East (2019 base sample: 151)	95%	94%	86%	89%	81%	45%
Bournemouth Water (2019 base sample: 152)	99%	93%	93%	90%	92%	61%
Bristol Water (2019 base sample: 300)	98%	94%	93%	91%	87%	60%
Cambridge Water (2019 base sample: 150)	99%	97%	97%	91%	88%	56%
Essex & Suffolk Water (2019 base sample: 150)	97%	93%	92%	89%	88%	50%
Hartlepool Water (2019 base sample: 150)	98%	99%	97%	91%	92%	80%
Portsmouth Water (2019 base sample: 301)	99%	92%	95%	89%	89%	60%
South East Water (2019 base sample: 350)	93%	90%	89%	85%	84%	57%
South Staffs Water (2019 base sample: 152)	97%	93%	93%	90%	83%	70%
SES Water (2019 base sample: 150)	100%	96%	97%	93%	95%	72%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 42: Satisfaction with aspects of water supply – WaSC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of water supply (Nine-year trend)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2019 base sample: 6310)	↔ 96.6%	↔ 92.8%	↔ 92.2%	↔ 88.6%	↔ 86.8%	↔ 68.9%
Total WaSCs (2019 base sample: 4003)	↔ 96.6%	↔ 92.7%	↔ 92.4%	↓ 88.9%	↔ 87.1%	↔ 71.8%
Anglian Water (2019 base sample: 400)	↔ 96.6%	↔ 92.8%	↔ 92.2%	↔ 88.0%	↔ 84.9%	↔ 54.2%
Dŵr Cymru Welsh Water (2019 base sample: 400)	↔ 97.9%	↔ 95.0%	↑ 95.2%	↔ 91.3%	↑ 91.6%	↔ 92.0%
Northumbrian Water (2019 base sample: 200)	↔ 98.0%	↔ 95.3%	↔ 94.9%	↔ 91.7%	↔ 90.4%	↔ 86.1%
Severn Trent (2019 base sample: 701)	↔ 97.0%	↔ 92.2%	↔ 92.5%	↔ 89.6%	↔ 86.0%	↔ 73.2%
South West Water (2019 base sample: 200)	↔ 96.0%	↔ 93.2%	↑ 92.4%	↔ 90.2%	↔ 85.9%	↔ 87.4%
Southern Water (2019 base sample: 401)	↔ 96.6%	↓ 91.7%	↓ 92.0%	↔ 89.3%	↔ 85.9%	↓ 57.6%
Thames Water (2019 base sample: 200)	↓ 94.9%	↓ 90.9%	↓ 89.0%	↓ 85.7%	↓ 84.0%	↔ 53.4%
United Utilities (2019 base sample: 700)	↔ 96.6%	↔ 93.8%	↔ 92.8%	↔ 88.4%	↔ 88.9%	↑ 87.1%
Wessex Water (2019 base sample: 200)	↓ 97.4%	↔ 93.7%	↑ 93.5%	↔ 90.4%	↔ 87.1%	↔ 60.1%
Yorkshire Water (2019 base sample: 401)	↔ 97.3%	↑ 94.4%	↑ 94.8%	↓ 90.4%	↑ 90.0%	↔ 80.4%

Table 43: Satisfaction with aspects of water supply – WoC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of water supply (Nine-year trend)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2019 base sample: 6310)	↔ 96.6%	↔ 92.8%	↔ 92.2%	↔ 88.6%	↔ 86.8%	↔ 68.9%
Total WoCs (2019 base sample: 2307)	↔ 96.6%	↔ 92.1%	↔ 91.4%	↔ 87.8%	↔ 85.6%	↔ 58.1%
Affinity Water Central (2019 base sample: 150)	↑ 95.8%	↔ 90.2%	↑ 88.2%	↔ 84.7%	↑ 81.5%	↔ 46.3%
Affinity Water East (2019 base sample: 151)	↔ 97.2%	↔ 92.7%	↓ 91.1%	↓ 83.6%	↔ 87.2%	↔ 53.4%

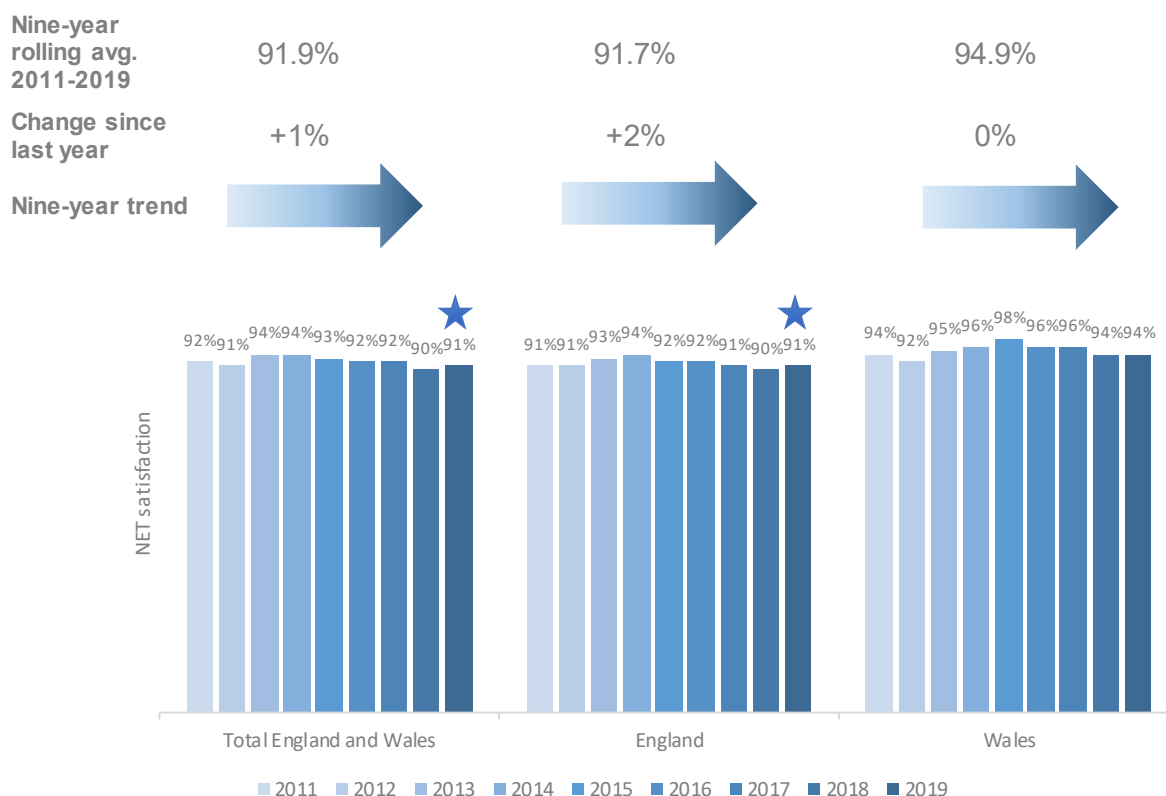
Affinity Water South East (2019 base sample: 151)	↔	96.5%	↔	90.1%	↔	91.3%	↔	88.2%	↔	83.6%	↔	53.6%
Bournemouth Water (2019 base sample: 152)	↑	97.6%	↔	94.6%	↔	94.8%	↔	90.2%	↑	90.9%	↔	60.0%
Bristol Water (2019 base sample: 300)	↑	96.9%	↑	93.4%	↔	92.2%	↑	89.1%	↔	87.5%	↓	63.6%
Cambridge Water (2019 base sample: 150)	↔	97.6%	↔	94.7%	↔	94.7%	↔	91.2%	↔	88.7%	↑	53.8%
Essex & Suffolk Water (2019 base sample: 150)	↓	97.1%	↔	92.9%	↔	92.0%	↓	88.1%	↔	88.6%	↔	54.9%
Hartlepool Water (2019 base sample: 150)	↓	98.2%	↔	96.2%	↔	95.3%	↔	91.6%	↔	91.0%	↔	70.6%
Portsmouth Water (2019 base sample: 301)	↔	97.4%	↔	93.9%	↔	92.9%	↔	89.1%	↔	88.6%	↔	59.3%
South East Water (2019 base sample: 350)	↔	96.2%	↓	90.7%	↔	90.7%	↓	88.2%	↔	82.1%	↓	59.1%
South Staffs Water (2019 base sample: 152)	↔	96.1%	↔	92.2%	↔	93.1%	↔	89.1%	↔	85.8%	↔	72.4%
SES Water (2019 base sample: 150)	↔	97.8%	↔	95.0%	↔	94.7%	↓	89.7%	↔	92.6%	↓	69.0%

5.2 Overall satisfaction with water supply

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

Figure 35 shows nine-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by Table 44 and Table 45, which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 35: Overall satisfaction with water supply



★ Significant difference between 2018 and 2019 data.

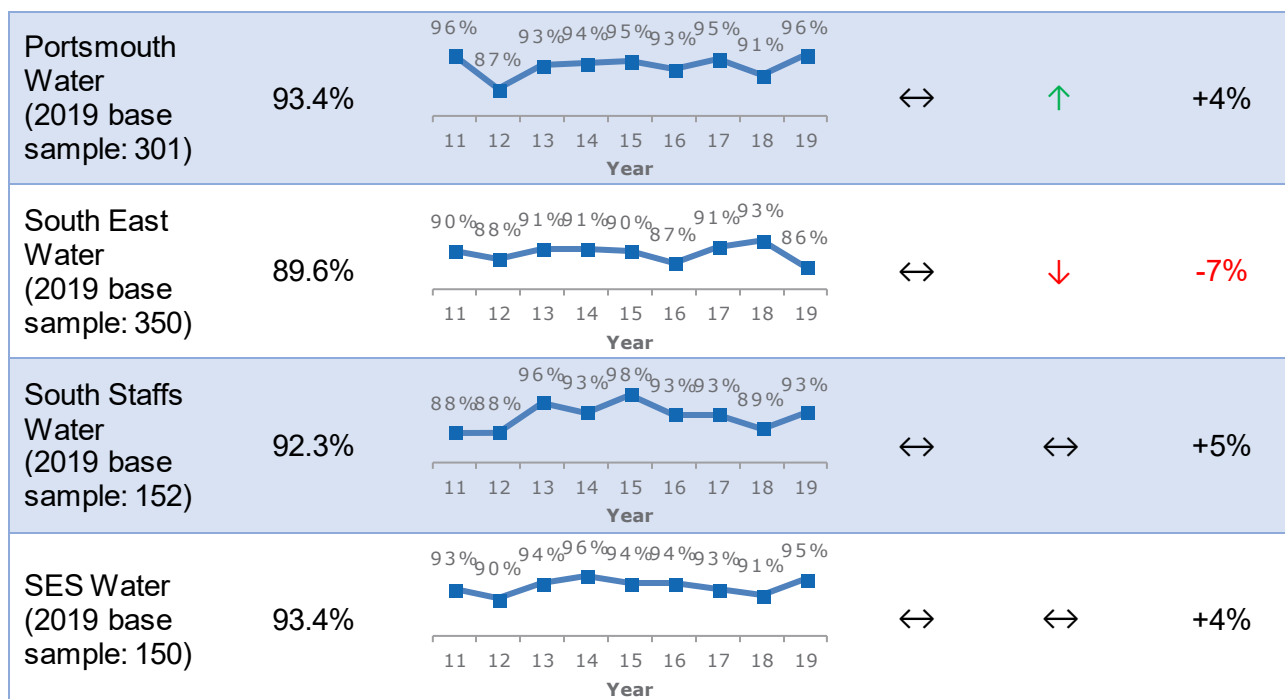
Table 44: Overall satisfaction with water supply – WaSCs

Satisfaction with water supply	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	91.9%		↔	n/a	+1%
Total WaSCs (2019 base sample: 4003)	92.0%		↔	91%	+2%
Anglian Water (2019 base sample: 400)	91.4%		↔	↔	+1%

Dŵr Cymru Welsh Water (2019 base sample: 400)	95.0%		↔	↔	0%
Hafren Dyfrdwy (2019 base sample: 200)	92.7%		n/a	↔	-1%
Northumbrian Water (2019 base sample: 200)	94.4%		↔	↔	+1%
Severn Trent (2019 base sample: 701)	93.0%		↔	↔	+3%
South West Water (2019 base sample: 200)	91.2%		↑	↔	+2%
Southern Water (2019 base sample: 401)	88.9%		↓	↔	+1%
Thames Water (2019 base sample: 200)	89.1%		↓	↓	+3%
United Utilities (2019 base sample: 700)	92.6%		↔	↔	+3%
Wessex Water (2019 base sample: 200)	92.6%		↓	↔	+2%
Yorkshire Water (2019 base sample: 401)	94.0%		↔	↔	-1%

Table 45: Overall satisfaction with water supply – WoCs

Satisfaction with water supply	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year																				
Industry (2019 base sample: 6310)	91.9%	<table><caption>Industry Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>92%</td><td>91%</td><td>94%</td><td>94%</td><td>93%</td><td>92%</td><td>92%</td><td>90%</td><td>91%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	92%	91%	94%	94%	93%	92%	92%	90%	91%	↔	n/a	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	92%	91%	94%	94%	93%	92%	92%	90%	91%																
Total WoCs (2019 base sample: 2307)	91.6%	<table><caption>Total WoCs Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>91%</td><td>89%</td><td>93%</td><td>93%</td><td>93%</td><td>91%</td><td>92%</td><td>91%</td><td>91%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	91%	89%	93%	93%	93%	91%	92%	91%	91%	↔	91%	0%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	91%	89%	93%	93%	93%	91%	92%	91%	91%																
Affinity Water Central (2019 base sample: 150)	90.1%	<table><caption>Affinity Water Central Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>88%</td><td>88%</td><td>91%</td><td>95%</td><td>93%</td><td>89%</td><td>91%</td><td>85%</td><td>90%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	88%	88%	91%	95%	93%	89%	91%	85%	90%	↔	↔	+5%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	88%	88%	91%	95%	93%	89%	91%	85%	90%																
Affinity Water East (2019 base sample: 151)	90.2%	<table><caption>Affinity Water East Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>92%</td><td>84%</td><td>89%</td><td>97%</td><td>92%</td><td>91%</td><td>91%</td><td>90%</td><td>87%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	92%	84%	89%	97%	92%	91%	91%	90%	87%	↔	↔	-3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	92%	84%	89%	97%	92%	91%	91%	90%	87%																
Affinity Water South East (2019 base sample: 151)	89.7%	<table><caption>Affinity Water South East Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>89%</td><td>91%</td><td>89%</td><td>91%</td><td>88%</td><td>91%</td><td>87%</td><td>91%</td><td>89%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	89%	91%	89%	91%	88%	91%	87%	91%	89%	↔	↔	-3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	89%	91%	89%	91%	88%	91%	87%	91%	89%																
Bournemouth Water (2019 base sample: 152)	93.6%	<table><caption>Bournemouth Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>96%</td><td>87%</td><td>95%</td><td>94%</td><td>95%</td><td>95%</td><td>91%</td><td>95%</td><td>94%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	96%	87%	95%	94%	95%	95%	91%	95%	94%	↔	↔	-1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	96%	87%	95%	94%	95%	95%	91%	95%	94%																
Bristol Water (2019 base sample: 300)	93.3%	<table><caption>Bristol Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>93%</td><td>90%</td><td>95%</td><td>94%</td><td>95%</td><td>89%</td><td>95%</td><td>97%</td><td>94%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	93%	90%	95%	94%	95%	89%	95%	97%	94%	↑	↔	-3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	93%	90%	95%	94%	95%	89%	95%	97%	94%																
Cambridge Water (2019 base sample: 150)	95.1%	<table><caption>Cambridge Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>96%</td><td>92%</td><td>96%</td><td>94%</td><td>93%</td><td>98%</td><td>95%</td><td>96%</td><td>96%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	96%	92%	96%	94%	93%	98%	95%	96%	96%	↔	↑	0%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	96%	92%	96%	94%	93%	98%	95%	96%	96%																
Essex & Suffolk Water (2019 base sample: 150)	92.1%	<table><caption>Essex & Suffolk Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>93%</td><td>91%</td><td>95%</td><td>91%</td><td>92%</td><td>93%</td><td>89%</td><td>91%</td><td>91%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	93%	91%	95%	91%	92%	93%	89%	91%	91%	↓	↔	0%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	93%	91%	95%	91%	92%	93%	89%	91%	91%																
Hartlepool Water (2019 base sample: 150)	94.7%	<table><caption>Hartlepool Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>96%</td><td>91%</td><td>95%</td><td>98%</td><td>96%</td><td>94%</td><td>93%</td><td>96%</td><td>93%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	96%	91%	95%	98%	96%	94%	93%	96%	93%	↔	↔	-3%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	96%	91%	95%	98%	96%	94%	93%	96%	93%																



5.3 Confidence in the long-term supply of water

In 2016 a new question was added to Water Matters to find out how confident customers feel 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. The findings at national level are shown in Figure 36. This is followed by Table 46 and Table 47 which shows perceptions by WaSC and then by WoC.

Figure 36: Confidence in the long-term supply of water

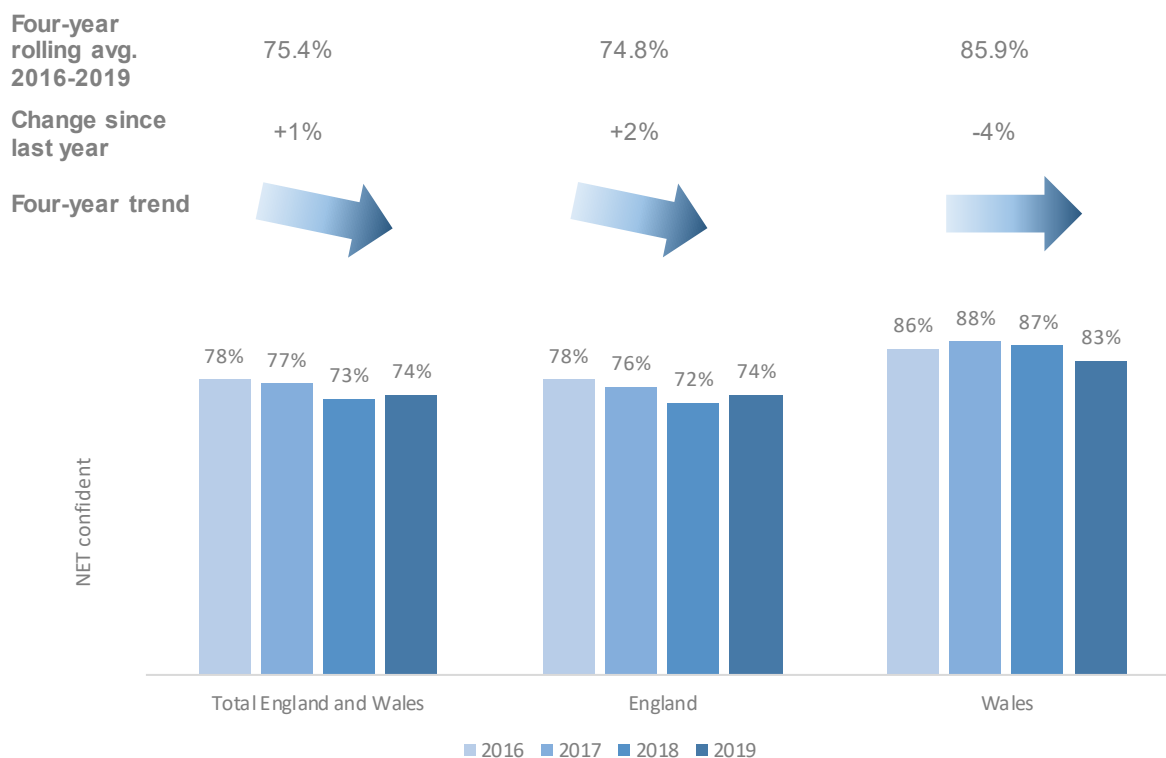


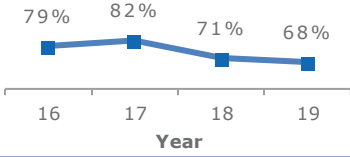
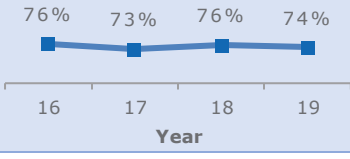

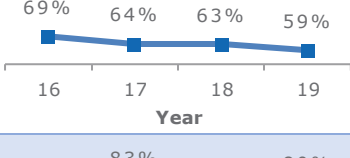

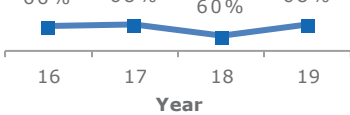
Table 46: Confidence in the long-term supply of water – WaSCs

Confidence in the long-term supply of water	Four-year rolling company average	Four-year company trend	Four-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	75.4%	<p>78% 77% 73% 74%</p> <p>16 17 18 19</p> <p>Year</p>	↓	n/a	+1%
Total WaSCs (2019 base sample: 4003)	76.6%	<p>80% 77% 74% 76%</p> <p>16 17 18 19</p> <p>Year</p>	↓	76%	+2%
Anglian Water (2019 base sample: 400)	74.0%	<p>74% 78% 73% 70%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↓	-3%
Dŵr Cymru Welsh Water (2019 base sample: 400)	86.2%	<p>86% 88% 87% 83%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	-4%
Hafren Dyfrdwy (2019 base sample: 200)	81.2%	<p>83% 79%</p> <p>16 17 18 19</p> <p>Year</p>	n/a	↔	-4%
Northumbrian Water (2019 base sample: 200)	86.6%	<p>85% 88% 85% 87%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	+2%
Severn Trent (2019 base sample: 701)	78.1%	<p>83% 81% 74% 75%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	0%
South West Water (2019 base sample: 200)	78.8%	<p>83% 77% 75% 80%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+6%
Southern Water (2019 base sample: 401)	67.1%	<p>74% 63% 64% 68%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↓	+4%
Thames Water (2019 base sample: 200)	66.9%	<p>73% 65% 64% 66%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↓	+2%

United Utilities (2019 base sample: 700)	77.1%	<p>81% 79% 71% 78%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+7%
Wessex Water (2019 base sample: 200)	79.8%	<p>79% 83% 80% 77%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-3%
Yorkshire Water (2019 base sample: 401)	84.1%	<p>83% 85% 83% 86%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	+2%

Table 47: Confidence in the long-term supply of water – WoCs

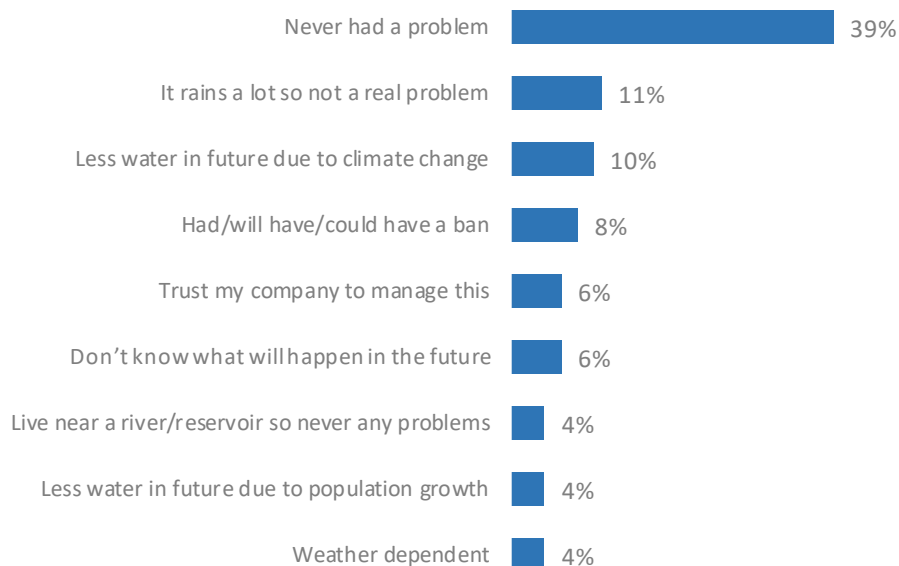
Confidence in the long-term supply of water	Four-year rolling company average	Four-year company trend	Four-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	75.4%	<p>78% 77% 73% 74%</p> <p>16 17 18 19</p> <p>Year</p>	↓	n/a	+1%
Total WoCs (2019 base sample: 2307)	71.1%	<p>72% 73% 69% 69%</p> <p>16 17 18 19</p> <p>Year</p>	↔	69%	0%
Affinity Water Central (2019 base sample: 150)	65.4%	<p>67% 70% 61% 63%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+2%
Affinity Water East (2019 base sample: 151)	69.8%	<p>74% 70% 70% 65%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	-5%
Affinity Water South East (2019 base sample: 151)	64.8%	<p>69% 63% 64% 63%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	0%
Bournemouth Water (2019 base sample: 152)	80.0%	<p>89% 79% 77% 76%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↔	-2%
Bristol Water (2019 base sample: 300)	77.4%	<p>70% 80% 79% 81%</p> <p>16 17 18 19</p> <p>Year</p>	↑	↑	+1%

Cambridge Water (2019 base sample: 150)	74.9%	 <p>79% 82% 71% 68%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-3%
Essex & Suffolk Water (2019 base sample: 150)	74.6%	 <p>76% 73% 76% 74%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	-2%
Hartlepool Water (2019 base sample: 150)	87.6%	 <p>88% 89% 87% 86%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	-1%
Portsmouth Water (2019 base sample: 301)	77.0%	 <p>76% 77% 76% 78%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	+2%
South East Water (2019 base sample: 350)	63.7%	 <p>69% 64% 63% 59%</p> <p>16 17 18 19</p> <p>Year</p>	↓	↓	-4%
South Staffs Water (2019 base sample: 152)	79.8%	 <p>79% 83% 77% 80%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↑	+4%
SES Water (2019 base sample: 150)	65.5%	 <p>66% 68% 60% 68%</p> <p>16 17 18 19</p> <p>Year</p>	↔	↔	+7%

5.4 Reasons for confidence/lack of confidence in longer-term water supply

In 2019, a new question was added to understand more about respondents' confidence, or lack of it, in the long-term availability of water supply without restriction. This is shown below in Figure 37.

Figure 37: Reasons for confidence / lack of confidence



Footnote: Reasons which are below 4% are not shown.

5.5 Water supply and bottled water

In 2019, a new question was added to understand availability to collect bottled water from a distribution station if water supply was unexpectedly turned off. This is shown below in Figure 38 and by water company in Table 48 and Table 49. Respondents were also asked in what circumstances, if any, they may need help collecting bottled water to see what awareness there was of the potential to be affected by transient circumstances which may change things temporarily. This data is shown in Figure 39.

Figure 38: Availability to collect bottled water from a local distribution station in the unlikely event water supply was cut off

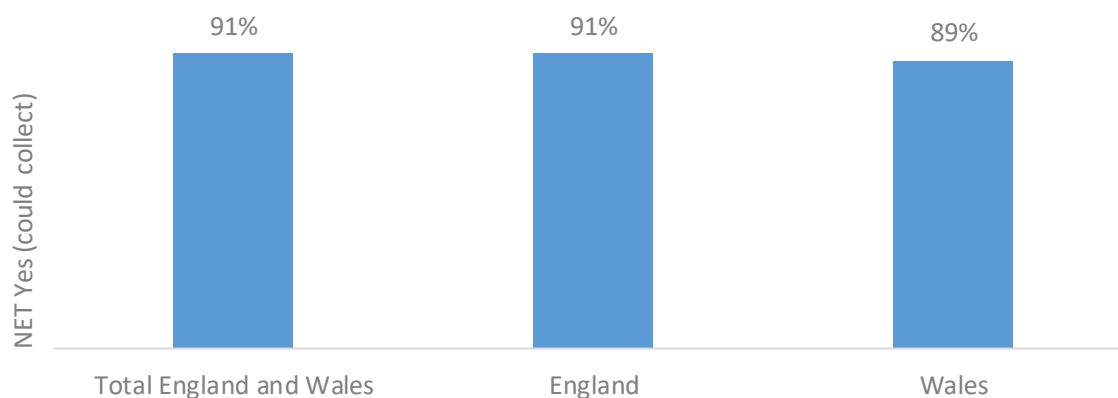


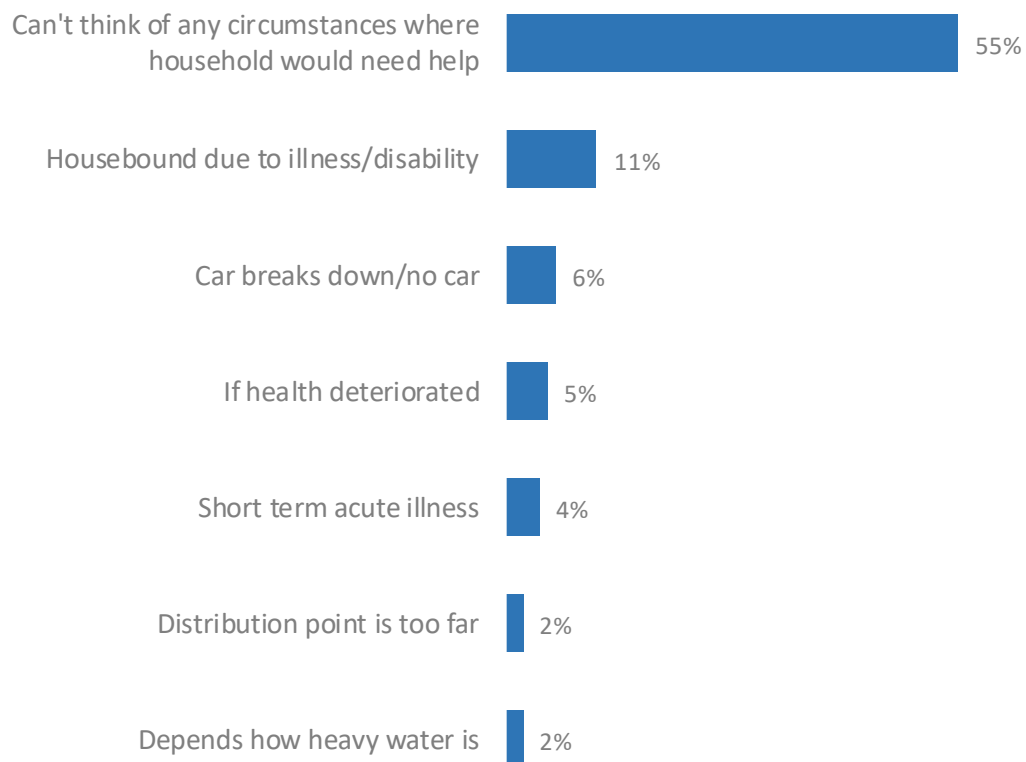
Table 48: Availability to collect bottled water – WaSCs

NET Yes	2019 average
Industry (2019 base sample: 6310)	91%
Total WaSCs (2019 base sample: 4003)	90%
Anglian Water (2019 base sample: 400)	90%
Dŵr Cymru Welsh Water (2019 base sample: 400)	89%
Hafren Dyfrdwy (2019 base sample: 200)	91%
Northumbrian Water (2019 base sample: 200)	88%
Severn Trent (2019 base sample: 701)	92%
South West Water (2019 base sample: 200)	91%
Southern Water (2019 base sample: 401)	91%
Thames Water (2019 base sample: 200)	89%
United Utilities (2019 base sample: 700)	91%
Wessex Water (2019 base sample: 200)	94%
Yorkshire Water (2019 base sample: 401)	89%

Table 49: Availability to collect bottled water – WoCs

NET Yes	2019 average
Industry (2019 base sample: 6310)	91%
Total WoCs (2019 base sample: 2307)	92%
Affinity Water Central (2019 base sample: 150)	92%
Affinity Water East (2019 base sample: 151)	87%
Affinity Water South East (2019 base sample: 151)	89%
Bournemouth Water (2019 base sample: 152)	91%
Bristol Water (2019 base sample: 300)	92%
Cambridge Water (2019 base sample: 150)	91%
Essex & Suffolk Water (2019 base sample: 150)	89%
Hartlepool Water (2019 base sample: 150)	94%
Portsmouth Water (2019 base sample: 301)	90%
South East Water (2019 base sample: 350)	93%
South Staffs Water (2019 base sample: 152)	91%
SES Water (2019 base sample: 150)	95%

Figure 39: Circumstance when might require help collecting bottled water



Footnote: Reasons below 2% are not shown.

Chapter 6: Views on sewerage services

This chapter presents customer satisfaction with different aspects of their sewerage service including reducing smells from sewage treatment works, maintenance of sewerage pipes and treatment works, the cleaning of wastewater before it is put back into rivers or the sea and the management of sewer flooding so that it is minimal. Respondents were then asked to rate their overall satisfaction with sewerage services.

6.1 Satisfaction with aspects of sewerage service

Figure 40 and Figure 41 shows the national trends for satisfaction with the four key aspects of sewerage service. This is followed by Figure 42 which compares satisfaction between England and Wales in 2019, Table 50 and Table 51 which show satisfaction in 2019 for each WaSC and WoC respectively, and finally

Table 52 and Table 53 which highlight the nine-year trends for WaSCs and WoCs.

Figure 40: Satisfaction with aspects of sewerage service (1)

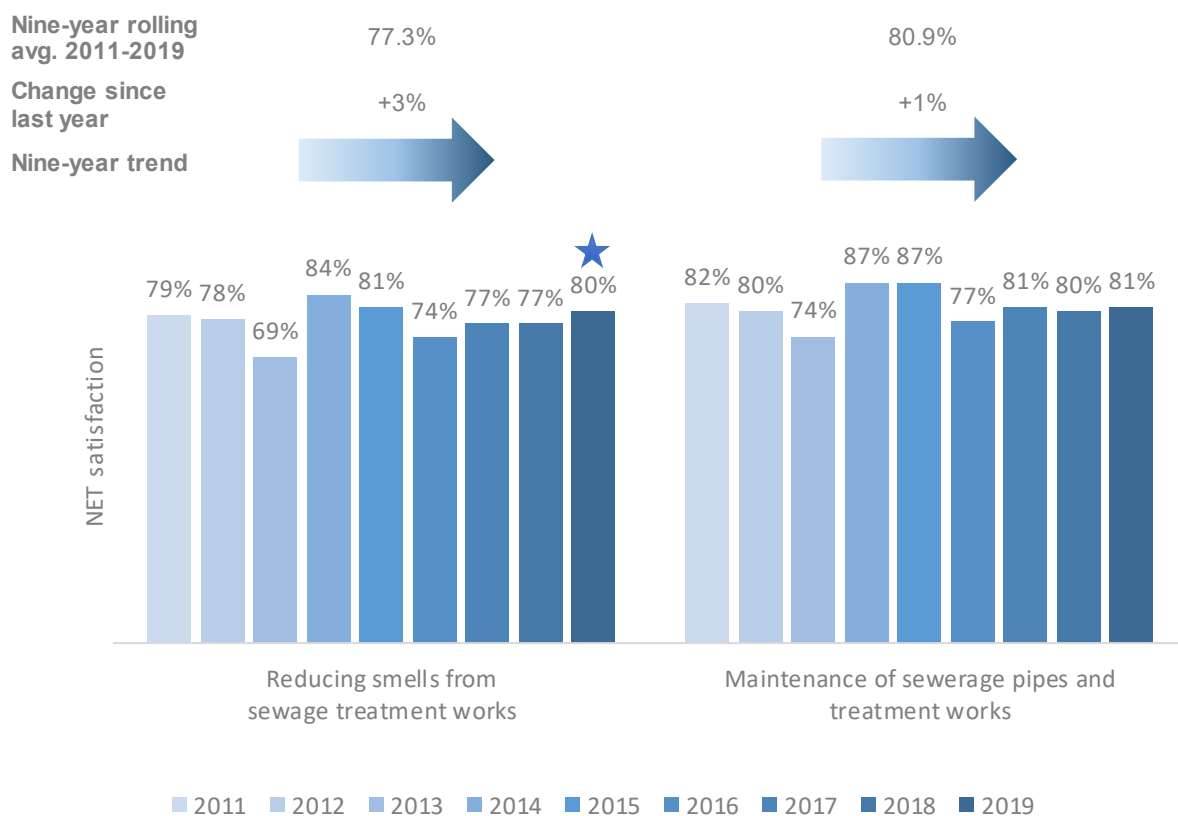


Figure 41: Satisfaction with aspects of sewerage service (2)

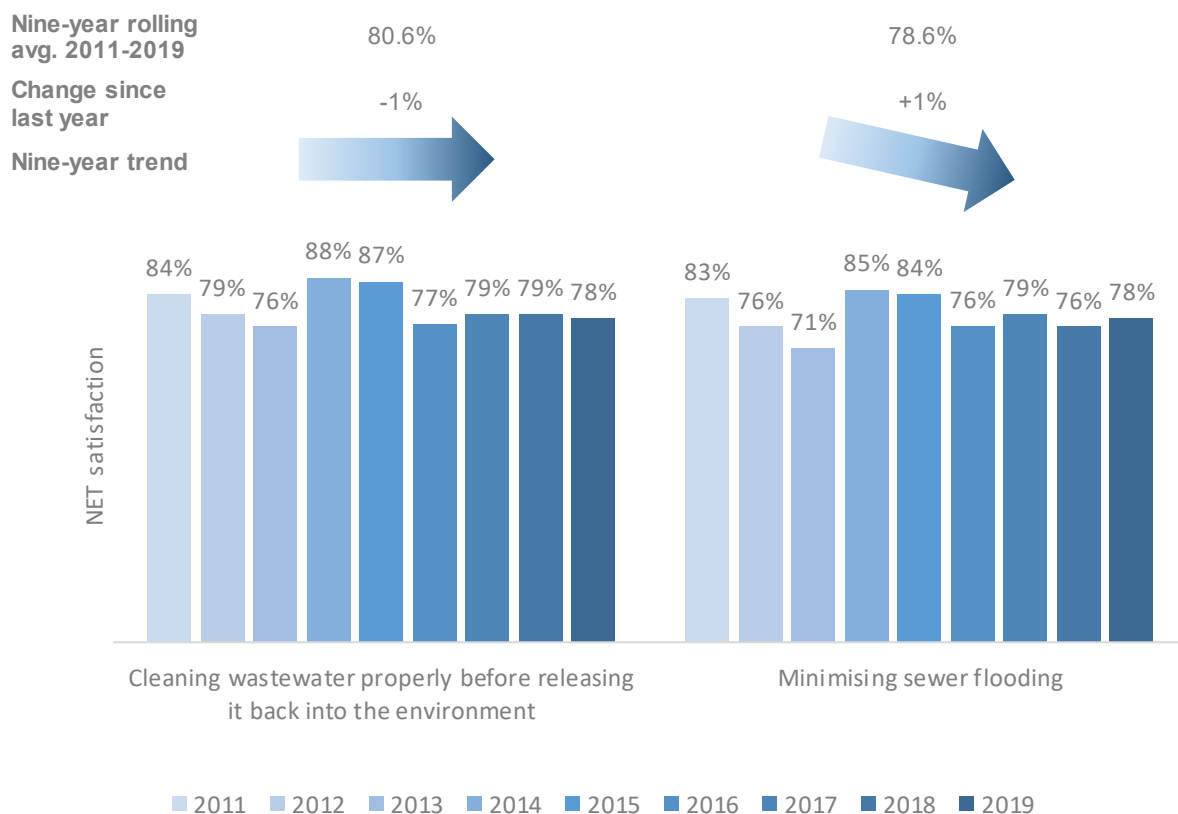


Figure 42: Satisfaction with aspects of sewerage service by nation

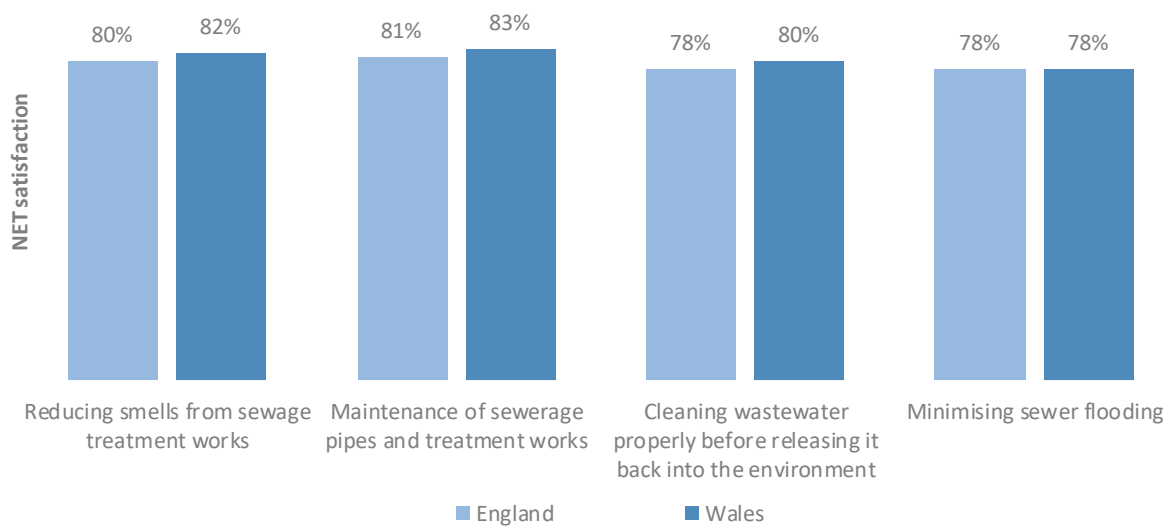


Table 50: Satisfaction with aspects of sewerage service in 2019 – WaSCs

Satisfaction with aspects of sewerage (2019 data only)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2019 base sample: 6310)	80%	81%	78%	78%
Total WaSCs (2019 base sample: 4003)	81%	82%	79%	78%
Anglian Water (2019 base sample: 400)	75%	82%	79%	77%
Dŵr Cymru Welsh Water (2019 base sample: 400)	82%	82%	80%	77%
Hafren Dyfrdwy (2019 base sample: 200)	83%	85%	81%	83%
Northumbrian Water (2019 base sample: 200)	82%	87%	82%	81%
Severn Trent (2019 base sample: 701)	83%	83%	83%	81%
South West Water (2019 base sample: 200)	81%	79%	75%	72%
Southern Water (2019 base sample: 401)	73%	76%	70%	72%
Thames Water (2019 base sample: 200)	81%	77%	69%	73%
United Utilities (2019 base sample: 700)	79%	83%	81%	78%
Wessex Water (2019 base sample: 200)	89%	89%	82%	85%
Yorkshire Water (2019 base sample: 401)	85%	85%	87%	83%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red.

Table 51: Satisfaction with aspects of sewerage service in 2019 – WoCs

Satisfaction with aspects of sewerage (2019 data only)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2019 base sample: 6310)	80%	81%	78%	78%
Total WoCs (2019 base sample: 2307)	78%	79%	75%	77%
Affinity Water Central (2019 base sample: 150)	74%	75%	75%	80%
Affinity Water East (2019 base sample: 151)	83%	81%	85%	80%
Affinity Water South East (2019 base sample: 151)	83%	84%	71%	72%
Bournemouth Water (2019 base sample: 152)	77%	83%	80%	81%
Bristol Water (2019 base sample: 300)	84%	84%	79%	83%
Cambridge Water (2019 base sample: 150)	79%	86%	87%	74%
Essex & Suffolk Water (2019 base sample: 150)	77%	84%	78%	85%
Hartlepool Water (2019 base sample: 150)	84%	85%	85%	88%
Portsmouth Water (2019 base sample: 301)	72%	75%	65%	69%
South East Water (2019 base sample: 350)	78%	73%	69%	68%
South Staffs Water (2019 base sample: 152)	85%	83%	82%	78%
SES Water (2019 base sample: 150)	82%	79%	66%	62%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red. 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.

Table 52: Satisfaction with aspects of sewerage service – WaSC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of sewerage (Nine-year trend data)	Reducing smells from sewage treatment works		Maintenance of sewerage pipes and treatment works		Cleaning wastewater properly before releasing back		Minimising sewer flooding	
Industry (2019 base sample: 6310)	↔	77.3%	↔	80.9%	↔	80.6%	↓	78.6%
Total WaSCs (2019 base sample: 4003)	↔	77.6%	↔	81.2%	↔	80.9%	↔	79.0%
Anglian Water (2019 base sample: 400)	↔	76.2%	↔	81.8%	↓	82.9%	↔	80.1%
Dŵr Cymru Welsh Water (2019 base sample: 400)	↔	82.2%	↔	84.7%	↔	84.7%	↔	82.5%
Northumbrian Water (2019 base sample: 200)	↔	81.8%	↔	86.2%	↔	85.1%	↔	83.0%
Severn Trent (2019 base sample: 701)	↔	81.1%	↔	82.6%	↔	83.9%	↔	80.8%
South West Water (2019 base sample: 200)	↑	75.5%	↔	78.3%	↔	75.8%	↓	72.3%
Southern Water (2019 base sample: 401)	↔	75.3%	↓	80.0%	↓	77.0%	↓	76.2%
Thames Water (2019 base sample: 200)	↔	73.3%	↔	76.1%	↓	73.7%	↓	74.4%
United Utilities (2019 base sample: 700)	↔	76.6%	↔	81.8%	↔	82.9%	↔	80.3%
Wessex Water (2019 base sample: 200)	↔	79.9%	↔	84.6%	↔	82.8%	↔	80.9%
Yorkshire Water (2019 base sample: 401)	↔	78.5%	↔	82.3%	↔	82.7%	↔	79.8%

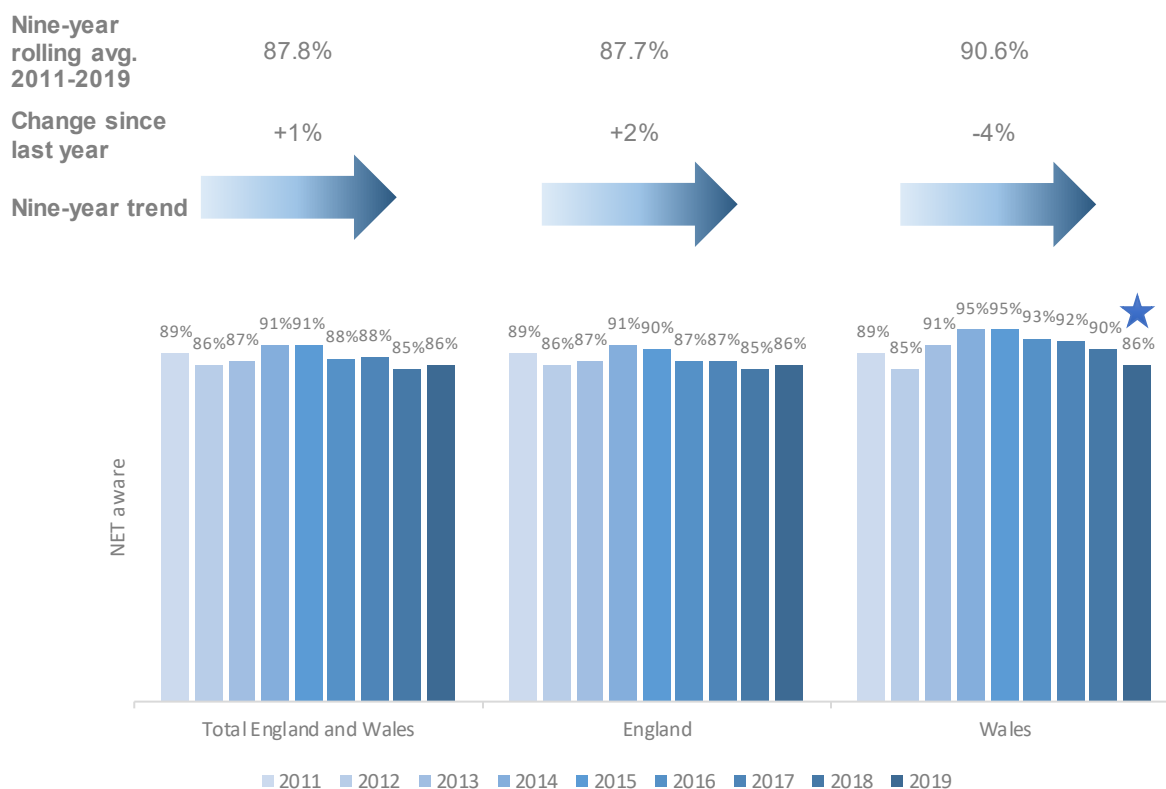
Table 53: Satisfaction with aspects of sewerage service – WoC nine-year trends (arrows) and nine-year rolling averages (figures)

Satisfaction with aspects of sewerage (Nine-year trend data)	Reducing smells from sewage treatment works		Maintenance of sewerage pipes and treatment works		Cleaning wastewater properly before releasing back		Minimising sewer flooding	
Industry (2019 base sample: 6310)	↔	77.3%	↔	80.9%	↔	80.6%	↓	78.6%
Total WoCs (2019 base sample: 2307)	↔	76.4%	↔	79.8%	↓	79.2%	↔	77.2%
Affinity Water Central (2019 base sample: 150)	↔	77.9%	↓	79.4%	↓	78.2%	↔	75.3%
Affinity Water East (2019 base sample: 151)	↔	77.2%	↔	79.4%	↔	80.8%	↔	80.8%
Affinity Water South East (2019 base sample: 151)	↔	78.1%	↔	80.0%	↓	77.8%	↓	77.3%
Bournemouth Water (2019 base sample: 152)	↑	70.8%	↔	80.9%	↔	80.0%	↑	79.7%
Bristol Water (2019 base sample: 300)	↔	79.8%	↔	83.7%	↔	82.0%	↔	82.6%
Cambridge Water (2019 base sample: 150)	↔	74.4%	↔	80.5%	↔	83.4%	↔	79.9%
Essex & Suffolk Water (2019 base sample: 150)	↔	73.3%	↔	78.7%	↓	78.0%	↔	75.7%
Hartlepool Water (2019 base sample: 150)	↔	84.0%	↔	85.6%	↔	85.5%	↔	85.8%
Portsmouth Water (2019 base sample: 301)	↔	75.8%	↓	79.3%	↓	75.3%	↔	74.7%
South East Water (2019 base sample: 350)	↔	75.7%	↓	77.2%	↔	77.0%	↓	75.3%
South Staffs Water (2019 base sample: 152)	↔	79.9%	↔	83.3%	↔	84.5%	↔	82.4%
SES Water (2019 base sample: 150)	↓	72.5%	↓	77.5%	↓	78.1%	↓	72.4%

6.2 Overall satisfaction with sewerage services

After rating satisfaction with different aspects of sewerage services, customers were asked for their overall level of satisfaction with their sewerage services. Figure 43 shows nine-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by Table 54 and Table 55, which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 43: Overall satisfaction with sewerage service



★ Significant difference between 2018 and 2019 data.

Table 54: Overall satisfaction with sewerage service – WaSCs

Satisfaction with sewerage service	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WaSC average	Change since last year
Industry (2019 base sample: 6310)	87.8%		↔	n/a	+1%
Total WaSCs (2019 base sample: 4003)	88.1%		↔	86%	+2%
Anglian Water (2019 base sample: 400)	87.7%		↔	↔	+3%

Dŵr Cymru Welsh Water (2019 base sample: 400)	90.7%	<table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>85%</td></tr><tr><td>13</td><td>91%</td></tr><tr><td>14</td><td>95%</td></tr><tr><td>15</td><td>96%</td></tr><tr><td>16</td><td>93%</td></tr><tr><td>17</td><td>92%</td></tr><tr><td>18</td><td>90%</td></tr><tr><td>19</td><td>85%</td></tr></table>	Year	Compliance (%)	11	90%	12	85%	13	91%	14	95%	15	96%	16	93%	17	92%	18	90%	19	85%	↔	↔	-4%
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United Utilities (2019 base sample: 700)	89.4%	<table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>90%</td></tr><tr><td>12</td><td>87%</td></tr><tr><td>13</td><td>89%</td></tr><tr><td>14</td><td>93%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>90%</td></tr><tr><td>17</td><td>89%</td></tr><tr><td>18</td><td>87%</td></tr><tr><td>19</td><td>87%</td></tr></table>	Year	Compliance (%)	11	90%	12	87%	13	89%	14	93%	15	93%	16	90%	17	89%	18	87%	19	87%	↔	↔	0%
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Wessex Water (2019 base sample: 200)	90.5%	<table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>89%</td></tr><tr><td>12</td><td>87%</td></tr><tr><td>13</td><td>90%</td></tr><tr><td>14</td><td>94%</td></tr><tr><td>15</td><td>93%</td></tr><tr><td>16</td><td>91%</td></tr><tr><td>17</td><td>90%</td></tr><tr><td>18</td><td>87%</td></tr><tr><td>19</td><td>93%</td></tr></table>	Year	Compliance (%)	11	89%	12	87%	13	90%	14	94%	15	93%	16	91%	17	90%	18	87%	19	93%	↔	↑	+6%
Year	Compliance (%)																								
11	89%																								
12	87%																								
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14	94%																								
15	93%																								
16	91%																								
17	90%																								
18	87%																								
19	93%																								
Yorkshire Water (2019 base sample: 401)	89.7%	<table><tr><th>Year</th><th>Compliance (%)</th></tr><tr><td>11</td><td>94%</td></tr><tr><td>12</td><td>85%</td></tr><tr><td>13</td><td>87%</td></tr><tr><td>14</td><td>91%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>91%</td></tr><tr><td>17</td><td>89%</td></tr><tr><td>18</td><td>88%</td></tr><tr><td>19</td><td>90%</td></tr></table>	Year	Compliance (%)	11	94%	12	85%	13	87%	14	91%	15	92%	16	91%	17	89%	18	88%	19	90%	↔	↑	+2%
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14	91%																								
15	92%																								
16	91%																								
17	89%																								
18	88%																								
19	90%																								

Table 55: Overall satisfaction with sewerage service – WoCs

Satisfaction with sewerage service ²⁶	Nine-year rolling company average	Nine-year company trend	Nine-year trend	Company average vs WoC average	Change since last year																				
Industry (2019 base sample: 6310)	87.8%	<table><caption>Industry Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>89%</td><td>86%</td><td>87%</td><td>91%</td><td>91%</td><td>88%</td><td>88%</td><td>85%</td><td>86%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	89%	86%	87%	91%	91%	88%	88%	85%	86%	↔	n/a	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	89%	86%	87%	91%	91%	88%	88%	85%	86%																
Total WoCs (2019 base sample: 2307)	86.9%	<table><caption>Total WoCs Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>89%</td><td>83%</td><td>85%</td><td>91%</td><td>91%</td><td>85%</td><td>88%</td><td>86%</td><td>86%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	89%	83%	85%	91%	91%	85%	88%	86%	86%	↔	86%	0%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	89%	83%	85%	91%	91%	85%	88%	86%	86%																
Affinity Water Central (2019 base sample: 150)	86.2%	<table><caption>Affinity Water Central Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>85%</td><td>81%</td><td>85%</td><td>89%</td><td>89%</td><td>85%</td><td>88%</td><td>87%</td><td>87%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	85%	81%	85%	89%	89%	85%	88%	87%	87%	↑	↔	0%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	85%	81%	85%	89%	89%	85%	88%	87%	87%																
Affinity Water East (2019 base sample: 151)	85.7%	<table><caption>Affinity Water East Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>88%</td><td>81%</td><td>81%</td><td>94%</td><td>89%</td><td>85%</td><td>81%</td><td>82%</td><td>89%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	88%	81%	81%	94%	89%	85%	81%	82%	89%	↔	↔	+6%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	88%	81%	81%	94%	89%	85%	81%	82%	89%																
Affinity Water South East (2019 base sample: 151)	84.7%	<table><caption>Affinity Water South East Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>81%</td><td>90%</td><td>78%</td><td>90%</td><td>88%</td><td>83%</td><td>85%</td><td>82%</td><td>84%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	81%	90%	78%	90%	88%	83%	85%	82%	84%	↔	↔	+2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	81%	90%	78%	90%	88%	83%	85%	82%	84%																
Bournemouth Water (2019 base sample: 152)	88.7%	<table><caption>Bournemouth Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>87%</td><td>83%</td><td>83%</td><td>91%</td><td>91%</td><td>94%</td><td>89%</td><td>91%</td><td>89%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	87%	83%	83%	91%	91%	94%	89%	91%	89%	↑	↔	-2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	87%	83%	83%	91%	91%	94%	89%	91%	89%																
Bristol Water (2019 base sample: 300)	89.9%	<table><caption>Bristol Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>91%</td><td>85%</td><td>88%</td><td>92%</td><td>91%</td><td>85%</td><td>93%</td><td>91%</td><td>92%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	91%	85%	88%	92%	91%	85%	93%	91%	92%	↔	↑	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	91%	85%	88%	92%	91%	85%	93%	91%	92%																
Cambridge Water (2019 base sample: 150)	88.9%	<table><caption>Cambridge Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>91%</td><td>89%</td><td>87%</td><td>94%</td><td>87%</td><td>88%</td><td>90%</td><td>88%</td><td>87%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	91%	89%	87%	94%	87%	88%	90%	88%	87%	↔	↔	-2%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	91%	89%	87%	94%	87%	88%	90%	88%	87%																
Essex & Suffolk Water (2019 base sample: 150)	86.8%	<table><caption>Essex & Suffolk Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>91%</td><td>85%</td><td>88%</td><td>86%</td><td>91%</td><td>83%</td><td>84%</td><td>86%</td><td>88%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	91%	85%	88%	86%	91%	83%	84%	86%	88%	↔	↔	+1%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	91%	85%	88%	86%	91%	83%	84%	86%	88%																
Hartlepool Water (2019 base sample: 150)	91.8%	<table><caption>Hartlepool Water Satisfaction Data (2011-2019)</caption><thead><tr><th>Year</th><th>2011</th><th>2012</th><th>2013</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th></tr></thead><tbody><tr><td>Satisfaction (%)</td><td>90%</td><td>87%</td><td>93%</td><td>98%</td><td>95%</td><td>90%</td><td>91%</td><td>93%</td><td>89%</td></tr></tbody></table>	Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	Satisfaction (%)	90%	87%	93%	98%	95%	90%	91%	93%	89%	↔	↔	-4%
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019																
Satisfaction (%)	90%	87%	93%	98%	95%	90%	91%	93%	89%																

²⁶ Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for

Portsmouth Water (2019 base sample: 301)	84.9%	<table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>85%</td></tr><tr><td>12</td><td>81%</td></tr><tr><td>13</td><td>85%</td></tr><tr><td>14</td><td>91%</td></tr><tr><td>15</td><td>88%</td></tr><tr><td>16</td><td>90%</td></tr><tr><td>17</td><td>84%</td></tr><tr><td>18</td><td>80%</td></tr><tr><td>19</td><td>80%</td></tr></table>	Year	Percentage	11	85%	12	81%	13	85%	14	91%	15	88%	16	90%	17	84%	18	80%	19	80%	↔	↓	0%
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South East Water (2019 base sample: 350)	84.9%	<table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>84%</td></tr><tr><td>12</td><td>83%</td></tr><tr><td>13</td><td>82%</td></tr><tr><td>14</td><td>92%</td></tr><tr><td>15</td><td>91%</td></tr><tr><td>16</td><td>81%</td></tr><tr><td>17</td><td>89%</td></tr><tr><td>18</td><td>82%</td></tr><tr><td>19</td><td>80%</td></tr></table>	Year	Percentage	11	84%	12	83%	13	82%	14	92%	15	91%	16	81%	17	89%	18	82%	19	80%	↔	↓	-2%
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South Staffs Water (2019 base sample: 152)	89.6%	<table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>91%</td></tr><tr><td>12</td><td>84%</td></tr><tr><td>13</td><td>89%</td></tr><tr><td>14</td><td>90%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>89%</td></tr><tr><td>17</td><td>94%</td></tr><tr><td>18</td><td>87%</td></tr><tr><td>19</td><td>90%</td></tr></table>	Year	Percentage	11	91%	12	84%	13	89%	14	90%	15	92%	16	89%	17	94%	18	87%	19	90%	↔	↔	+3%
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SES Water (2019 base sample: 150)	85.1%	<table><tr><th>Year</th><th>Percentage</th></tr><tr><td>11</td><td>88%</td></tr><tr><td>12</td><td>86%</td></tr><tr><td>13</td><td>82%</td></tr><tr><td>14</td><td>92%</td></tr><tr><td>15</td><td>92%</td></tr><tr><td>16</td><td>82%</td></tr><tr><td>17</td><td>84%</td></tr><tr><td>18</td><td>78%</td></tr><tr><td>19</td><td>82%</td></tr></table>	Year	Percentage	11	88%	12	86%	13	82%	14	92%	15	92%	16	82%	17	84%	18	78%	19	82%	↔	↔	+4%
Year	Percentage																								
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17	84%																								
18	78%																								
19	82%																								

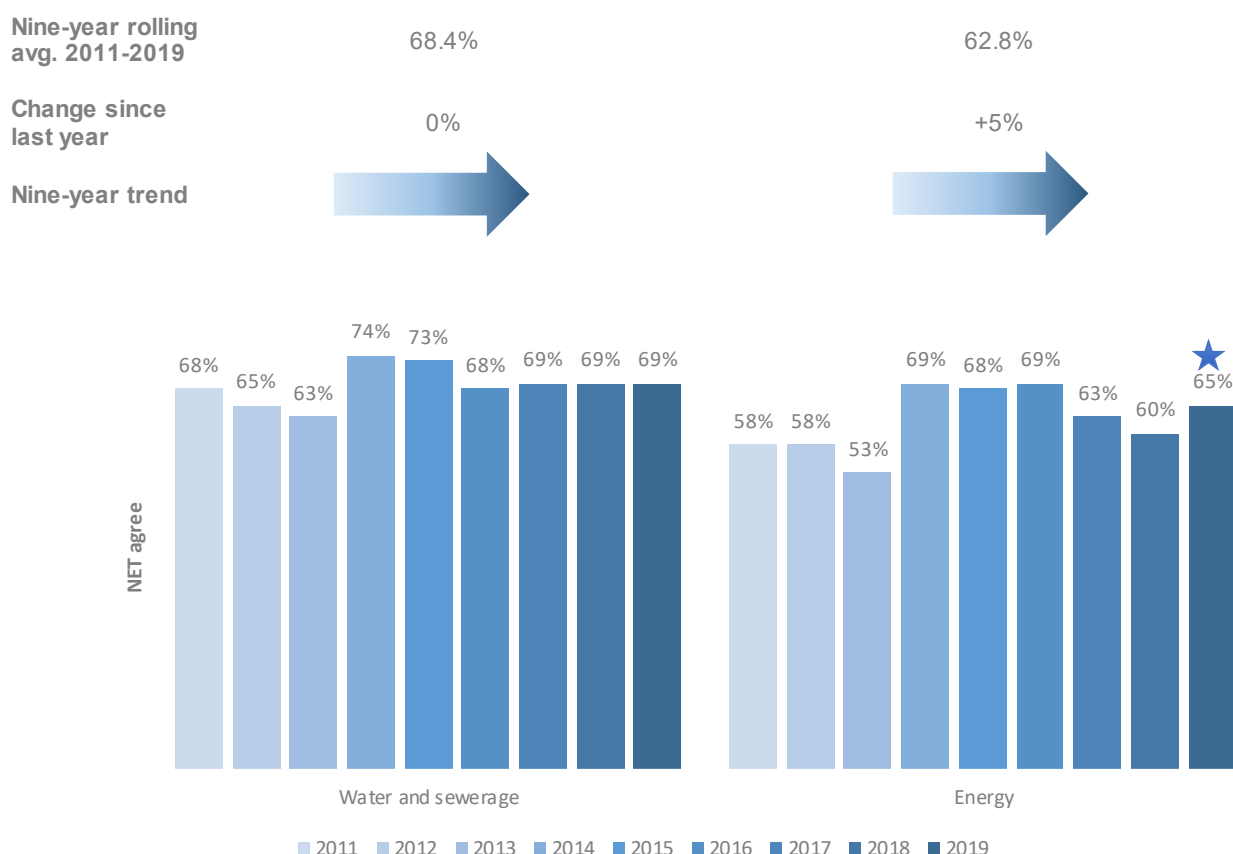
Chapter 7: Comparisons of customer views on water and sewerage companies with their views on other service providers

Respondents were asked several questions about other utility services and providers to help understand how customer perceptions of water companies compare to other service providers. This includes their views on how much companies care about the service they provide, trust in companies, views on value for money and satisfaction with the service provided.

7.1 Perceptions that water and energy companies care about the services they provide

Figure 44 shows how views on care compare between water companies and energy service providers.

Figure 44: Perceptions of how much water and energy companies care about their services

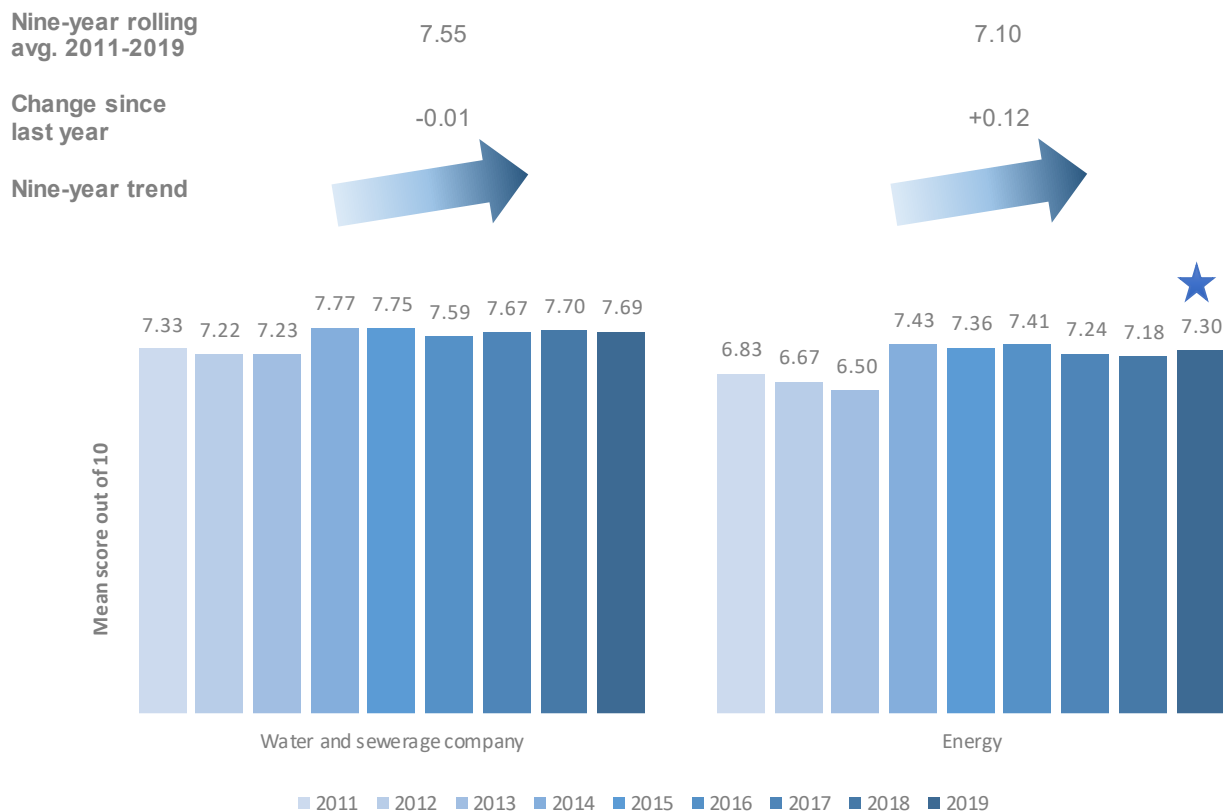


★ Significant difference between 2018 and 2019 data.

7.2 Comparison of customer trust in water and in energy 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, with 10 being complete trust and 1 being distrust.

Figure 45: Relative trust in water and in energy service providers



7.3 Comparative satisfaction with value for money of household services

As well as being asked for their views on water and sewerage services, respondents were asked to rate their satisfaction with value for money of a range of other household service providers including energy, telecoms and council services. Figure 46 and Figure 47 refer to these.

Figure 46: Comparative satisfaction with value for money of household services

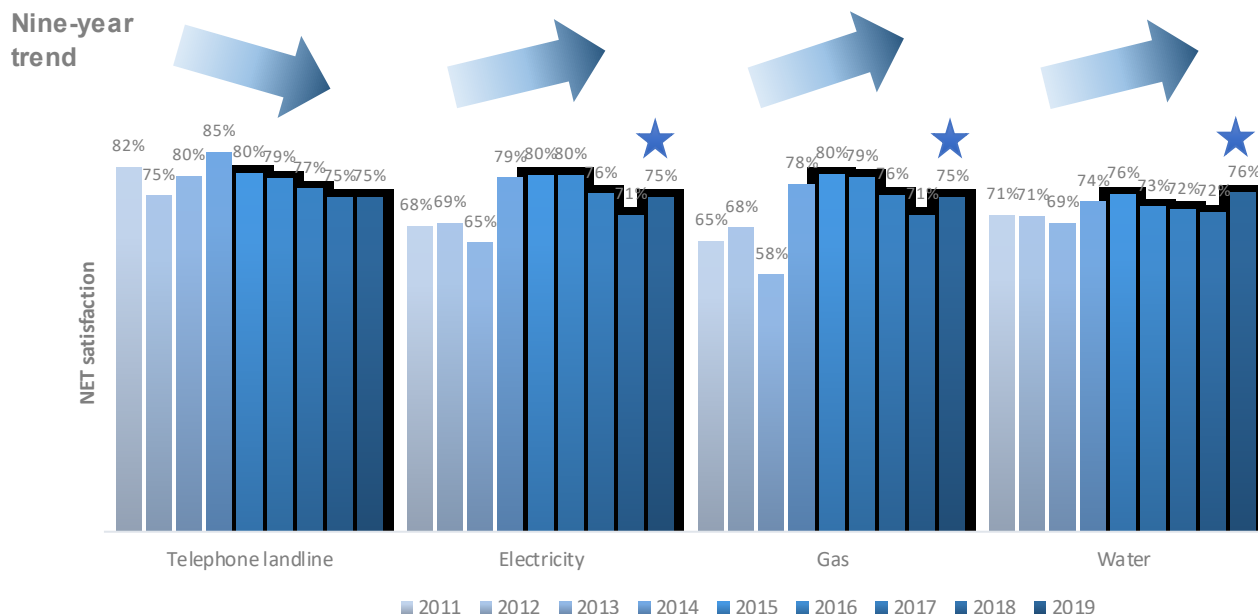
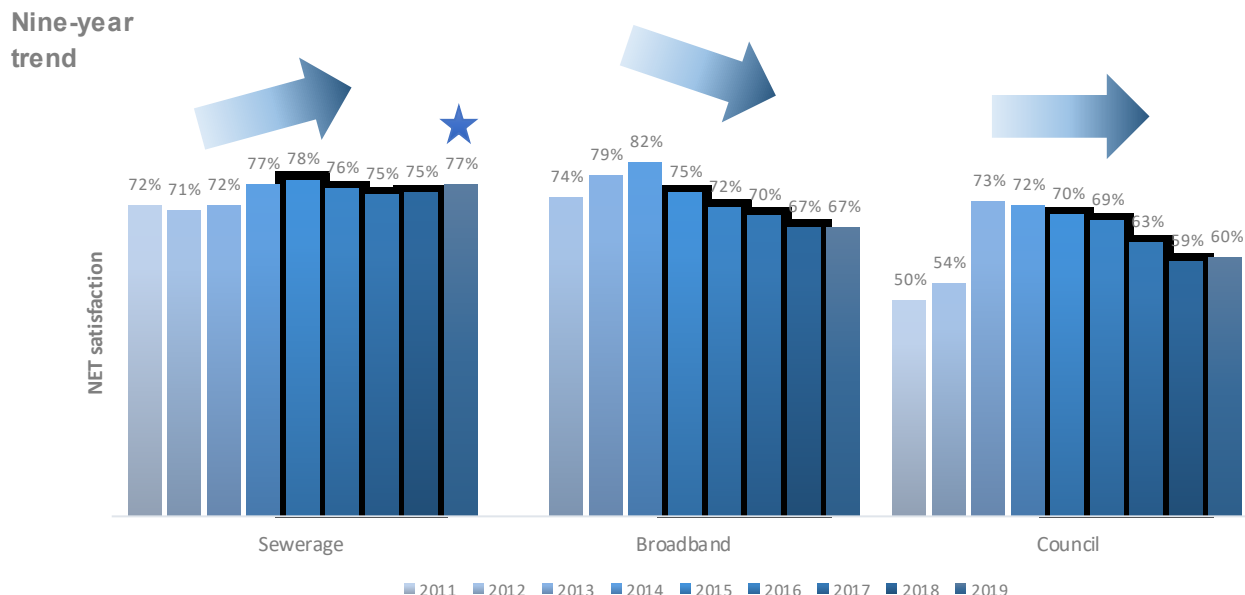


Figure 47: Comparative satisfaction with value for money of household services



7.4 Comparative satisfaction with household services

As well as being asked for their overall satisfaction with water and sewerage services, respondents were asked to rate this for a range of other household service providers including energy, telecoms and council services. Figure 48 and Figure 49 show comparative satisfaction with other household services.

Figure 48: Comparative satisfaction with household services

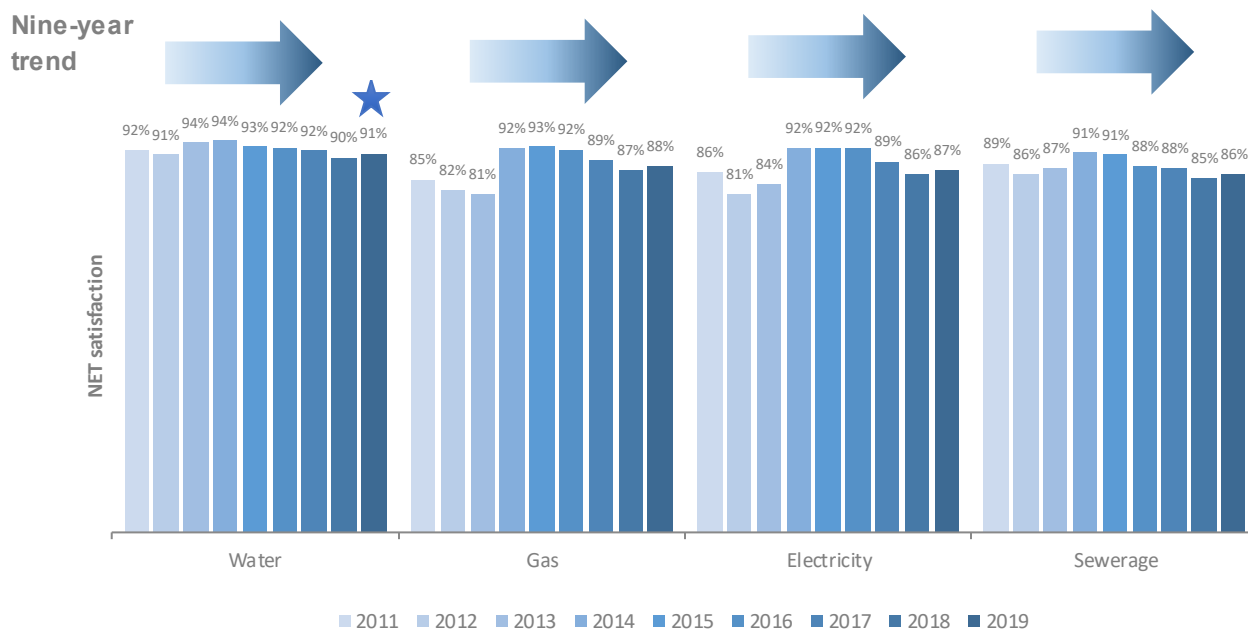
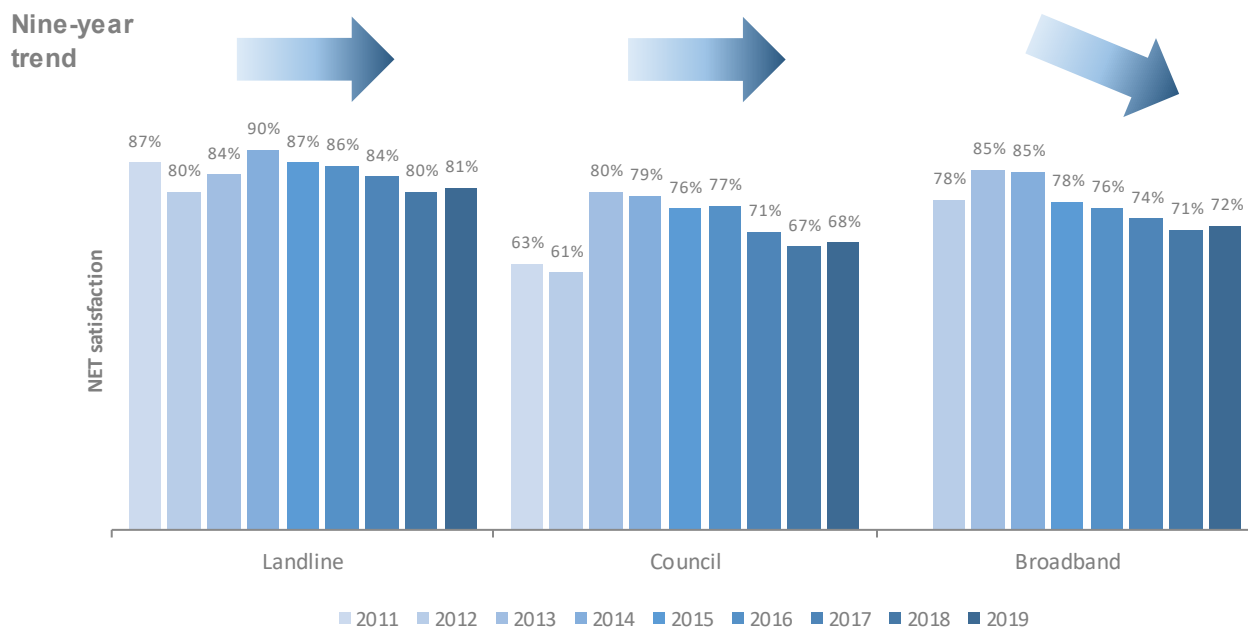


Figure 49: Comparative satisfaction with household services



Chapter 8: Overall experience measures

This final chapter covers overall experience. This is measured via a new question, which was added to the Water Matters survey in 2017, to find out, all things considered, how customers rate their overall satisfaction with their water company. Data from 2017, 2018 and 2019 is shown in Figure 50. This is followed by Table 56 and Table 57, which show satisfaction for WaSCs and for WoCs in turn.

8.1 Overall satisfaction

Figure 50: Satisfaction with overall experience of water/sewerage service provider

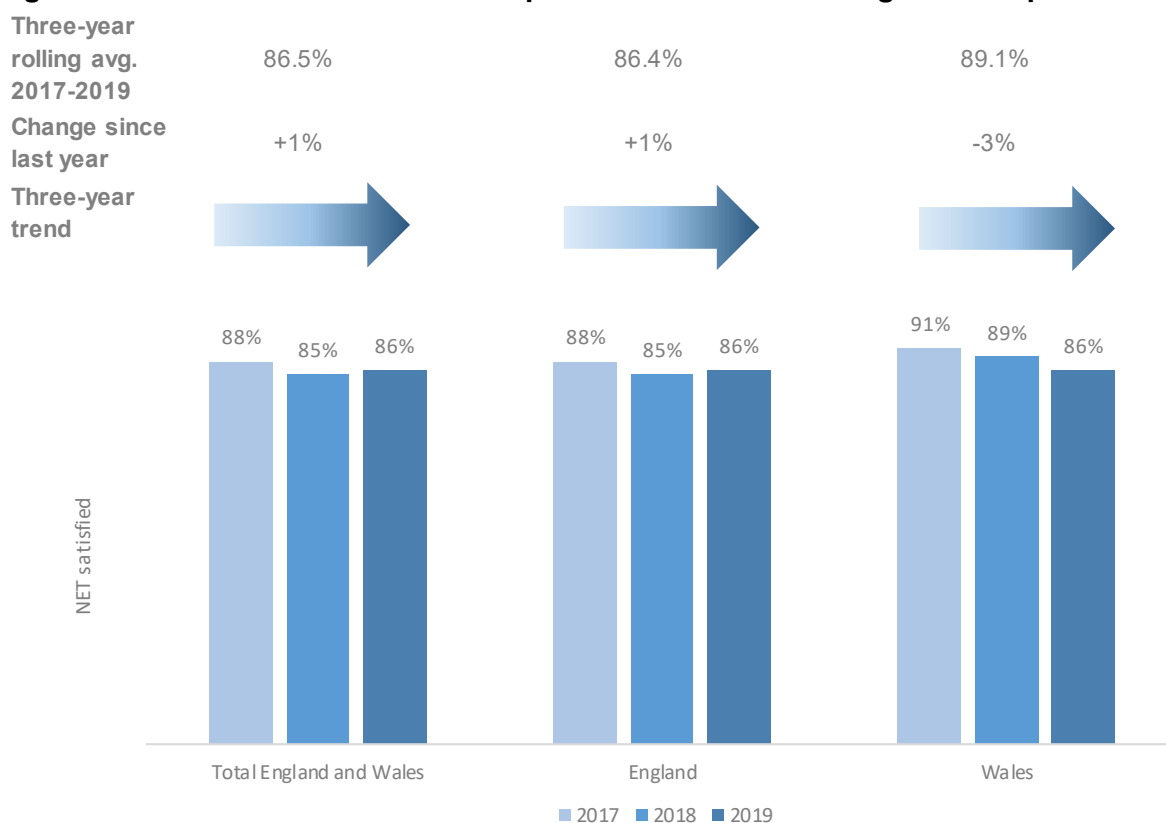


Table 56: Satisfaction with overall experience of water/sewerage service provider – WaSCs

Satisfaction with overall experience	2017	2018	2019
Industry (2019 base sample: 6310)	88%	85%	86%
Total WaSCs (2019 base sample: 4003)	88%	85%	86%
Anglian Water (2019 base sample: 400)	90%	85%	84%
Dŵr Cymru Welsh Water (2019 base sample: 400)	91%	90%	86%
Hafren Dyfrdwy (2019 base sample: 200)	n/a	87%	86%
Northumbrian Water (2019 base sample: 200)	90%	90%	91%
Severn Trent (2019 base sample: 701)	89%	87%	88%
South West Water (2019 base sample: 200)	85%	78%	80%

Southern Water (2019 base sample: 401)	79%	79%	84%
Thames Water (2019 base sample: 200)	86%	79%	78%
United Utilities (2019 base sample: 700)	88%	87%	88%
Wessex Water (2019 base sample: 200)	88%	85%	90%
Yorkshire Water (2019 base sample: 401)	91%	88%	92%

Table 57: Satisfaction with overall experience of water/sewerage service provider – WoCs

Satisfaction with overall experience	2017	2018	2019
Industry (2019 base sample: 6310)	88%	85%	86%
Total WoCs (2019 base sample: 2307)	88%	87%	87%
Affinity Water Central (2019 base sample: 150)	84%	85%	85%
Affinity Water East (2019 base sample: 151)	89%	80%	87%
Affinity Water South East (2019 base sample: 151)	83%	89%	82%
Bournemouth Water (2019 base sample: 152)	92%	92%	90%
Bristol Water (2019 base sample: 300)	93%	92%	92%
Cambridge Water (2019 base sample: 150)	92%	88%	93%
Essex & Suffolk Water (2019 base sample: 150)	85%	89%	89%
Hartlepool Water (2019 base sample: 150)	89%	89%	91%
Portsmouth Water (2019 base sample: 301)	90%	89%	89%
South East Water (2019 base sample: 350)	89%	85%	82%
South Staffs Water (2019 base sample: 152)	93%	85%	90%
SES Water (2019 base sample: 150)	89%	84%	89%

8.2 Likelihood to recommend water company

Customers were 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.

Table 58 below shows the NPS for WaSCs, followed by Table 59 for WoCs based on likelihood to recommend them as a provider of water services.

Table 58: Likelihood to recommend water company as a provider of water services – WaSCs

NPS Score	2014	2015	2016	2017	2018	2019
Anglian	25	20	17	22	18	18
Dŵr Cymru	37	38	33	38	44	38
Hafren Dyfrdwy	n/a	n/a	n/a	n/a	25	23
Northumbrian	35	31	32	40	38	37
Severn Trent	27	16	19	22	20	22
South West	-20	-7	3	-7	-10	-6
Southern	9	-2	5	-3	-7	-4
Thames	4	0	-4	1	6	-9
United Utilities	27	21	14	23	16	21
Wessex	30	25	14	28	18	33
Yorkshire	33	34	20	38	38	33

Table 59: Likelihood to recommend water company as a provider of water services – WoCs

NPS Score	2014	2015	2016	2017	2018	2019
Affinity Central	15	3	4	-4	-1	9
Affinity East	18	5	-1	12	6	19
Affinity South East	3	1	5	-5	0	-4
Bournemouth	34	29	21	24	27	33
Bristol	14	23	-1	31	24	29
Cambridge	26	25	21	17	29	17
Essex & Suffolk	12	20	14	18	25	19
Hartlepool	55	48	23	38	37	62
Portsmouth	35	19	6	33	24	35
South East	9	9	4	6	3	-1

South Staffordshire	21	43	31	27	13	24
SES	24	18	6	10	10	7

8.3 Likelihood to recommend sewerage company – WoCs

As they receive services from two different companies, customers of WoCs were also asked how likely they would be to recommend the WaSC providing their sewerage services to friends and family using the same scale of 0 to 10. This is shown in Table 60 below. **Error! Reference source not found.** shows the results WoCs by each wastewater provider.

Table 60: Likelihood to recommend sewerage company as a provider of sewerage services – WoCs

NPS Score	2014	2015	2016	2017	2018	2019
Affinity Central	13	0	-19	-3	3	7
Affinity East	21	3	-3	2	5	21
Affinity South East	-3	-3	-16	-9	-10	-5
Bournemouth	30	23	16	21	28	30
Bristol	14	25	-6	28	20	22
Cambridge	20	10	5	17	21	17
Essex & Suffolk	7	16	-5	14	23	20
Hartlepool	54	39	21	35	37	54
Portsmouth	25	3	4	22	0	4
South East	10	13	-22	3	-9	-4
South Staffordshire	20	39	1	20	5	20
SES	15	10	-17	-1	0	-3

Appendices

A1. Target Quotas

		Total England and Wales	England	Wales
Gender	Male	47%	47%	46%
	Female	53%	53%	54%
Age	18-29	4%	4%	4%
	30-44	1%	18%	15%
	45-59	36%	36%	37%
	60-74	27%	27%	29%
	75+	14%	14%	15%
SEC	Higher managerial, administrative & professional occupations	42%	42%	40%
	Intermediate Occupations	23%	23%	20%
	Routine & manual occupations	24%	24%	28%
	Long term unemployed/ student	11%	10%	11%

A2. Sample profile

		Unweighted		Weighted	
		No	%	No	%
Gender	Male	2982	47%	2943	47%
	Female	3328	53%	3367	53%
Age	18-29	182	3%	260	4%
	30-44	793	13%	877	14%
	45-59	2264	36%	2288	36%
	60-74	2009	32%	1880	30%
	75+	1062	17%	1005	16%
SEC	Higher managerial, administrative & professional occupations	2974	47%	2961	47%
	Intermediate Occupations	1329	21%	1342	21%
	Routine & manual occupations	1448	23%	1413	22%
	Long term unemployed/ student	428	7%	453	7%
Household Composition	With children	1256	20%	1329	21%
	Without children	4898	78%	4828	77%
Ethnicity	White	5872	96%	5699	93%
	Mixed	61	1%	108	2%
	Asian	111	2%	179	3%
	Black	46	1%	87	1%
	Other	34	1%	47	1%
Disability in household	Yes	1611	26%	1539	24%
	No	4535	72%	4607	73%
Tenure	Owner occupied	5056	80%	4692	79%
	Private rental	459	7%	517	8%
	Council tenant	307	5%	327	5%
	Housing Association tenant	279	4%	302	5%
	Leaseholder	18	<1%	17	<1%

		Unweighted		Weighted	
Meter in household	Yes	3581	57%	3550	57%
	No	2625	43%	2664	43%
Meter fitting (where meter present)	Already fitted	1604	45%	1586	45%
	Requested fitting	1247	35%	1247	35%
	Fitted as part of a metering scheme	632	18%	626	18%
Income	Less than £10,000	384	6%	363	6%
	£10,000 to £19,999	836	13%	833	13%
	£20,000 to £29,999	768	12%	752	12%
	£30,000 to £39,999	630	10%	593	9%
	£40,000 to £49,999	482	8%	500	8%
	£50,000 to £74,999	593	9%	657	10%
	£75,000 to £99,999	247	4%	275	4%
	£100,000 or more	215	3%	216	3%
Receive benefits	Yes	1131	18%	1142	18%
	No	4818	76%	4819	76%
Internet access	Yes	5693	90%	5704	90%
	No	560	9%	552	9%
Urbanicity	Urban	2312	37%	2481	39%
	Rural	1652	26%	24%	24%
	Suburban/semi-rural	2162	34%	2164	34%

A3. Questionnaire

DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH
Tel: 01663-767857 – JN 5889 V1, 2018-19

Introduction

Good morning/afternoon, my name is ... I am calling from DJS Research on behalf of the Consumer Council for Water, the **water watch dog** 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. **As a thank-you for taking part in the survey you will be entered into a prize draw where you have a chance of winning £250 as the first prize and £100 as the second prize.**

Towards the end of the survey we will also ask you a couple of questions about your employment status – this information is only collected to ensure we have a good mix of people included in the survey, it will not be used for any other purpose.

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 Society Code of Conduct.

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

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

Screener Questions

S1 DELETED		
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?		
If respondent says they pay their water will as part of their rent, code as 4.		
READ OUT		
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
I pay my water bill as part of my rent	4	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 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 A consumer organisation e.g. Passenger Focus, Energy Ombudsman Which?, Citizens Advice Market Research ----- None of the above	1	Thank and close
	2	
	3	
	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	SCREEN OUT
ASK IF CODE 5-8 AT D2. OTHERS GO TO D4a D3 Are you retired? SINGLE CODE		
Yes	1	
No	2	
Refused	86	
ASK ALL D4NEW: <u>At home</u>, do you have: READ OUT AND CODE FOR EACH a) Telephone landline, b) Access to broadband		
Yes	1	
No	2	
Don't know	86	
IF D4aa_1 (IF HAVE A LANDLINE) D4b Do you use your landline for telephone calls?		
Yes	1	
No	2	
IF D4aa_86 (DON'T KNOW) OR IF D4b_2 (DON'T USE LANDLINE FOR CALLS) D4c Do you use a mobile for telephone calls?		
Yes	1	
No	2	
MOBILE SAMPLE INCLUDES: D4aa_2 (NO TELEPHONE LANDLINE) OR D4aa_1 (TELEPHONE LANDLINE) AND D4b_2 (DON'T USE FOR TELEPHONE CALLS) AND D4c_1 (USE MOBILE FOR CALLS) OR IF D4aa_86 (DON'T KNOW) AND D4c_1 (USE MOBILE)		
READ OUT: The next few questions are about your occupation. These questions will assist with us with analysing the results by different demographics to ensure CC Water fully understand views by all household types		

ASK ALL Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job. D5 Do you (did you) work as an employee or are you (were you) self-employed? SINGLE CODE. READ OUT IF NECESSARY				
Employee	1		D6	
Self-employed with employees	2		D7	
Self-employed/freelance without employees	3		D9	
Not applicable - Long term unemployed/never worked	4		Q1a	
Not applicable - Full time student	5		Q1a	
ASK ALL EMPLOYEES (D5/1) D6 How many people work (worked) for your employer at the place where you work (worked)? READ OUT IF NECESSARY				
1-24	1			
25 or more	2		D8	
ASK ALL EMPLOYERS (D5/2) D7 How many people do (did) you employ?				
1-24	1		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		D9	
No	2			

ASK ALL EMPLOYED (D5/1-3)		
D9 What do you do for work? If you are not working now, what did you do in your last job? SINGLE CODE ONLY. DO NOT READ OUT – 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	
INTERVIEWER NOTE - IF RESPONDENT REFUSES READ OUT: I would like to reassure you that this information is only being collected to make sure we have a good mix of people included in the survey, it will not be used for any other purpose. On this basis would you be happy to tell me about the sort of work you do, or if you're not working now, what you did in your last job?		Continue – but will need to screen out once we hit the first refusal quota.

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"			
Anglian Water Services Ltd	1	Q2	
Dŵr Cymru Cyfyngedig (Welsh Water)	2		
Northumbrian Water Ltd	3		
Severn Trent Water Ltd	4		
South West Water Ltd	5		
Southern Water Services Ltd	6		
Thames Water Utilities Ltd	7		
United Utilities Water Plc (North West Water)	8		
Wessex Water Services Ltd	9		
Yorkshire Water Services Ltd	10		

Water only companies		Q3	
Bournemouth Water Plc	11		
Bristol Water Plc	12		
Cambridge Water Company Plc	13	Q3	
Cholderton & District Water Company Ltd	14		

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 Staffordshire Water Plc	21		
SES Water (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		

Hafren Dyfrydwy	26	Go to Q3	

Stated water company differs from sample	25	Go to Q1b	
Don't know	85	Go to Q1b	

ASK IF DON'T KNOW/STATED COMPANY DIFFERS AT Q1A OTHERS GO TO FILTER AT Q2			
Q1b Is your postcode <insert from sample>?			
Yes, same as sample	1	GO TO Q1c	
Incorrect – Enter correct postcode (first part and first digit of second part)	2		

IF CODE 2 AT Q1b POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE			
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2			
Q1c In your area, your water company is likely to be [insert name of water company]. Does that sound right?			
Yes	1	GO BACK AND CODE Q1A THEN TO FILTER AT Q2 CLOSE	
No	2		

ASK IF CODES 1-10 AT Q1A. OTHERS GO TO FILTER AT Q3		
Q2 And 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	GO TO Q6 CLOSE
Have septic tank	2	
Different company provides my sewerage services	3	
Don't know	85	GO TO Q6
Q1a2 AND Q1a3 DELETED		
ASK IF CODES 11-24 or 26 AT Q1a. OTHERS GO TO FILTER AT Q6		
Q3 Do you have a septic tank?		
Yes	1	Q6
No	2	Go to Q4 if codes 11-24 at Q1a. Go to Q5a if code 26 at Q1a (Hafren)
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, or 2 at Q3 if Hafren = water company at Q1a. 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 IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS		
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	
Hafren Dyfrdwy	12	Q5b
Stated company differs to sample	11	Q5b
Don't know	85	
Scripting note: If water company is Hafren and sewerage company is not either Hafren or Welsh Water, close.		
IF Q4_2 (NO) OR Q5A_85 (DON'T KNOW) OR Q5_11 (STATED COMPANY DIFFERS TO SAMPLE) REFER TO SAMPLE AND ASK:		
Q5b Is your postcode <insert postcode from sample>?		

Yes, same as sample Incorrect – Enter correct postcode (first part and first digit of second part)	1 2	Q5c
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	
Q7a – Q8c PARKED		

Company Information

ASK ALL 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 AND CODE FOR EACH AND THERE SHOULD BE 6 RESPONSE CODES FOR EACH DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (HAVE SEPTIC TANK) Q10 And the sewerage services in your area?		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	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	1	
No – gas and electricity from separate companies	2	
Don't have mains gas	3	
Don't know	85	
Q12 Thinking 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 <i>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.</i> 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 1 AT D4ab d) Your telephone landline services ASK IF CODE 1 AT D4aa e) Council services ASK ALL		
Q13a AND Q13b PARKED 2018		

<p>ASK ALL</p> <p>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</p> <p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> <p>Don't know 85</p>		
Q15 PARKED 2018		
<p>ASK ALL</p> <p>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</p> <p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> <p>Don't know 85</p>		
Q16b, Q16c, Q16d Parked		
SWW £50 GOVERNMENT CONTRIBUTION – Q PARKED		

Section B: Consumer Rights and Responsibility

<p>ASK ALL</p> <p>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</p> <p>Very likely 1</p> <p>Fairly likely 2</p> <p>Not very likely 3</p> <p>Not at all likely 4</p> <p>Don't know 85</p>		
<p>ASK IF WATER METER (CODE 1 AT Q6). OTHERS GO TO Q20</p> <p>Q19 You said earlier that your household had a water meter, which of the following apply to you? SINGLE CODE</p> <p>Your property already had meter when moved in 1</p> <p>You asked for a meter to be fitted 2</p> <p>Had no choice - water company fitted one as part of a metering scheme 3</p> <p>Other (specify) 80</p> <p>Don't know 85</p>		
<p><u>DO NOT ASK SOUTHERN WATER (Q1_6) OR SOUTH EAST WATER (Q1_20) CUSTOMERS</u></p> <p>ASK IF Q6_2/85 AND IF NOT IN CM POST CODE LIST (SEE Q20 POSTCODE EXCEL FILE SAVED IN SAMPLE & DATA FOLDER)</p> <p>Q20B – IN ADDITION, DO NOT ASK THOSE POSTCODES IN FILE TITLED Q20B ADDITIONAL POSTCODES TO EXCLUDE</p> <p>Q20 Were you aware that ...: SINGLE CODE FOR EACH STATEMENT Scale: 1=Yes, 2= No, 85= Don't know</p> <p>a) If you ask for a meter to be fitted, your water company will install one free of charge</p> <p>b) You have up to two years to decide whether you prefer the meter or would like to go back to a water rate charge for your property</p>		WILL BE ROUTED FROM POST-CODE
<p>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.</p>		
<p>ASK ALL</p> <p>Q21 Are you aware of or are you currently on [CODE 2 or 26 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</p> <p>READ OUT. SINGLE CODE</p> <p>Yes, have heard of it but do not need it 1</p> <p>Yes, have subscribed to it 2</p> <p>No, but would like to know more 3</p> <p>No, but do not need it 4</p> <p>Don't know 85</p>		
<p>ASK ALL, BRING IN RELEVANT CODES AS INDICATED</p> <p>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</p> <p>Anglian Water (Q1a/1)</p> <p>Lite social tariff</p> <p>Anglian Water Assistance Fund</p> <p>Aquacare Plus</p>		

Access to charitable trusts		
Dwr Cymru (Q1a/2)		
HelpU social tariff		
Water Direct		
Customer Assistance Fund		
Northumbrian Water (Q1a/3)		
SupportPlus Reduced Tariff Scheme		
SupportPlus Arrears Scheme		
Severn Trent Water (Q1a/4)		
Big Difference social tariff scheme		
Severn Trent Trust Fund		
Water Direct		
South West Water (Q1a/5)		
WaterCare social tariff		
Southern Water (Q1a/6)		
Essentials Social Tariff		
New Start		
Support tariff for customers metered under water metering programme		
Thames Water (Q1a/7)		
WaterSure Plus social tariff		
Charitable Trust/ Trust Fund		
Customer Assistance Fund		
Thames Water Trust Fund		
Water Direct		
United Utilities (Q1a/8)		
Help to Pay Social Tariff		
Charitable Trust/ Restart Trust Fund		
Back on Track (Previously Support Tariff)		
Payment matching scheme for arrears		
Wessex Water (Q1a/9)		
Assist social tariff		
Restart		
Restart Plus		
Yorkshire Water (Q1a/10)		
Water Support social tariff		
Yorkshire Water Community Trust		
Resolve scheme		
Water Direct		
Bournemouth Water (Q1a/11)		
WaterCare social tariff		
Bristol Water (Q1a/12)		
Assist social tariff		
Restart		
Restart Plus		
Cambridge Water (Q1a/13)		
Assure social tariff		
NewStart		
Grants for those facing severe financial difficulty		
Essex & Suffolk Water (Q1a/16)		
SupportPlus Reduced Tariff Scheme		
SupportPlus Arrears Scheme		
Affinity Water (Q1a/17,23,24)		
Li£t (pronounced Lift) social tariff		
Hartlepool (Q1a/18)		
Lite social tariff		

<p>AquaCare Plus Trust Fund</p> <p>Portsmouth (Q1a/19) Helping Hand social tariff Arrears Assist Scheme</p> <p>South East Water (Q1a/20) Social Tariff Helping Hand Scheme</p> <p>South Staffs Water (Q1a/21) Assure Social Tariff South Staffs Water Charitable Trust Fund</p> <p>SES (Q1a/22) Water support social tariff Clear Start Water Direct</p> <p>Hafren Dyfrydwy (Q1a/26) Big Difference Scheme Here2Help Social Tariff</p> <p><ALL> Other (specify) No, not aware of any</p>		
Q24 PARKED		
<p>ASK ALL</p> <p>Q25 Are you aware of any additional free services (also known as priority 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</p> <p>Yes, have heard of it but do not need it 1</p> <p>Yes, have subscribed to it 2</p> <p>No, but would like to know more 3</p> <p>No, but do not need it 4</p> <p>Don't know 85</p>		
Q26 PARKED		
Q27a AND Q27b PARKED IN 2018		
<p>ASK ALL</p> <p>Q28 Have you contacted your water / water and sewerage company in the past 12 months? SINGLE CODE</p> <p>INTERVIEWER PLEASE CONFIRM</p> <p>Yes – water and sewerage company 1</p> <p>Yes – water company 2</p> <p>Yes – sewerage company 3</p> <p>No 4</p> <p>Don't know 85</p>	<p>Q29</p> <p>Q33a</p>	

ASK IF YES AT Q28 (CODES 1-3).		
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 (responsibility)	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	
Q32 AND Q33a-c PARKED		
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ3a		
Q30 Thinking about the contact you made, 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 NQ3a		
Q31 Taking everything into account, overall how satisfied or dissatisfied were you with this contact? SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

<p>ASK ALLNQ3a How well does your water company (if a WOC and codes 11-25 or Hafren and Welsh Water), or codes 1-10 (WaSC) and septic tank (Q2 code 2) OR Hafren and tank / water and sewerage company (if codes 1-10 – WaSC and Q2 code 1 or 85 (no septic tank) communicate with you about its services and plans, and the availability of things like WaterSure and Priority or additional services on a scale from 1-5 where 1 indicates that their communication is very good and 5 indicates that it is very poor.</p>		
<p>Very good</p> <p>Fairly good</p> <p>Neither good nor poor</p> <p>Fairly poor</p> <p>Very poor</p> <p>Don't know</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>85</p>	
<p>ASK NQ3/1-5</p> <p>NQ3b Why do you say that? DO NOT READ OUT. MULTICODE</p>		
<p>I don't get regular correspondence/don't hear much from them/</p> <p>The only communication I get is my bills/I don't recall any correspondence from</p> <p>them apart from my bill</p> <p>We get notified/informed of any changes/disruptions/interruptions</p> <p>I am satisfied with the communication/amount of communication I receive</p> <p>I don't need/want/care to know</p> <p>I have had no communication/correspondence</p> <p>I am not aware of any support/ programmes/ schemes/ opportunities/plans/tariffs</p> <p>they offer</p> <p>I have received correspondence from them</p> <p>The information comes with my bill</p> <p>I get more than enough/plenty information</p> <p>The communication is not clear/it is poor</p> <p>I am dissatisfied with the service I received</p> <p>I don't hear from them as much as I used to/I would like more correspondence</p> <p>from them</p> <p>I receive information regularly from them</p> <p>I only get communication/communicate when necessary</p> <p>The only communication I receive is regarding insurance</p> <p>The information is available</p> <p>They are very helpful throughout communications</p> <p>They need to improve their communication/correspondence</p> <p>They resolved our issue</p> <p>Because of the correspondence I receive</p> <p>I am satisfied with their response rate</p> <p>The service works</p> <p>Slow with information</p> <p>I would contact them personally</p> <p>I have seen the adverts on the TV</p> <p>I have had someone visit me</p> <p>Never had a problem with communication</p> <p>Other (please specify)</p> <p>Don't know</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p> <p>23</p> <p>24</p> <p>25</p> <p>26</p> <p>27</p> <p>80</p> <p>85</p>	

<p>ASK ALL</p> <p>NQ1a Thinking about customer service more generally, including the bills you get, frequency of bills, meter readings and payment options, how satisfied are you with the customer service of your [CODES 11-24 AT Q1a OR HAFREN AND WELSH WATER = 'water']/ [CODES 1-10 AT Q1a OR HAFREN AND HAFREN OR HAFREN AND SEPTIC TANK = 'water and sewerage'] company? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1</p> <p>Fairly satisfied 2</p> <p>Neither satisfied nor dissatisfied 3</p> <p>Fairly dissatisfied 4</p> <p>Very dissatisfied 5</p> <p>Don't know 85</p>		
<p>ASK IF NQ1a=4/5</p> <p>NQ1b Why do you say that you are dissatisfied with the customer service? VERBATIM COMMENT</p>		

Section C: Water on Tap

<p>ASK ALL</p> <p>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</p> <p>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.</p> <p>The colour and appearance of your tap water 1</p> <p>Taste and smell of tap water 2</p> <p>Hardness/softness of your water 3</p> <p>The safety of your drinking water 4</p> <p>The reliability of your water supply 5</p> <p>Your water pressure 6</p>		
<p>ASK ALL</p> <p>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</p> <p>Very satisfied 1</p> <p>Fairly satisfied 2</p> <p>Neither satisfied nor dissatisfied 3</p> <p>Fairly dissatisfied 4</p> <p>Very dissatisfied 5</p> <p>Don't know 85</p>		
<p>Q36b & Q37a/b PARKED</p>		
<p>ASK ALL</p> <p>NQ2 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? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very confident 1</p> <p>Fairly confident 2</p> <p>Neither confident nor unconfident 3</p> <p>Fairly unconfident 4</p> <p>Very unconfident 5</p>		

	Don't know	85	
ASK IF NQ2/1-5			
NQ2b Why do you say that? DO NOT READ OUT. MULTICODE			
Should spend more on new infrastructure (e.g. water storage/reservoirs/water network/grid)		1	
Less water in future due to climate change		4	
Less water in future due to population growth		5	
Too much water lost to leaks/leaks need fixing		6	
Trust my company to manage this		10	
It rains a lot so not a real problem		11	
Never had a problem		14	
I live near a river/reservoir so never seen/heard of any problems		15	
Other (please specify)		80	
Don't know		85	
ASK ALL			
NQ4a In the unlikely event that your water supply was off for more than a few hours, is there someone in your household who would be able to pick up bottled water from a local water company distribution station? SINGLE CODE. READ OUT IF NECESSARY			
Yes, I could do it myself		1	
Yes, someone else in the house could collect it		2	
No, there is no-one in the house who could collect it		3	
Don't know		85	
ASK ALL			
NQ4b In what circumstances, if any, do you think you might need help in collecting bottled water? DO NOT READ OUT. MULTICODE			
If car breaks down or haven't got a car		1	
Housebound: long term illness/disability/frail/old		2	
If the roads are down		3	
Full-time carer		4	
Looking after new-born baby		5	
Short term acute illness (e.g. flu)		6	
Recovering from surgery		7	
Too busy		8	
Water company's job to deliver it		9	
Don't know where the water company distribution point is		10	
The water company distribution point is too far away		11	
Wouldn't need help/can't think of any circumstances I would need help		12	
If the weather is bad/there is flooding		13	
If my health deteriorated		14	
Other (please specify)		80	
Don't know		85	

Section D: Keeping it Clean

Q38 PARKED 2018		
<p>ASK IF Q2/1 or 85 OR Q3/2 (NO SEPTIC TANK)</p> <p>Q39 How satisfied are you with your sewerage company's management of the following aspects of their sewerage service.....: READ OUT EACH STATEMENT AND SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS</p> <p><i>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.</i></p> <p>a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning wastewater properly before releasing it back into the environment d) Minimising sewer flooding</p>		
<p>ASK IF Q2/1, 85 OR Q3/2 (NO SEPTIC TANK)</p> <p>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</p> <p>Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		
Q40b PARKED		
<p>ASK ALL</p> <p>Q40c Now thinking about your overall experience of ['water and sewerage services' IF "((Q1a/1-10) and (Q2/1,85)) or ((Q1a/26) and Q5a/12)"/[ALL OTHERS 'water supply'] - including the provision of ['water and sewerage' IF "((Q1a/1-10) and (Q2/1,85)) or ((Q1a/26) and Q5a/12)"/[ALL OTHERS 'water']" as well as charges, customer services and billing - how satisfied or dissatisfied are you?</p> <p>SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		
Park Q40d		

<p>ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY</p> <p>Q41 Now, thinking about other household services you receive, how satisfied or dissatisfied are you with....?: READ OUT EACH SERVICE & SINGLE CODE</p> <p><i>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.</i></p> <p>a) Your gas service ASK IF CODE 1-2 AT Q11 b) Your electricity service ASK ALL c) Your broadband services ASK IF CODE 1 at D4ab d) Your telephone landline services ASK IF CODE 1 at D4aa e) Council services ASK ALL</p>		
<p>ASK ALL</p> <p>Q42 How much do you agree or disagree that your water [IF CODES 1-10 AT Q1A AND Q2/1, 85 OR HAFREN AND HAFREN also insert 'and sewerage'] company cares about the service it gives to customers? READ OUT IF NECESSARY. SINGLE CODE</p> <p>Strongly agree 1 Tend to agree 2 Neither agree nor disagree 3 Tend to disagree 4 Strongly disagree 5 Don't know 85</p>		
<p>ASK ALL</p> <p>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</p> <p>Strongly agree 1 Tend to agree 2 Neither agree nor disagree 3 Tend to disagree 4 Strongly disagree 5 Don't know 85</p>		
<p>ASK ALL</p> <p>Q44a How much do you trust your [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a OR HAFREN + WELSH OR HAFREN + SEPTIC TANK = '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</p> <p>Do not trust them at all 1 2 3 4 5 6 7 8 9 Trust them completely 10 Don't know 85</p>		
<p>Park Q44b, Q44c</p>		

<p>ASK ALL</p> <p>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</p> <p>Do not trust them at all</p> <p>Trust them completely</p> <p>Don't know</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>85</p>	
<p>Park Q45a, Q45b</p>		
<p>Q46 AND Q47 PARKED</p>		
<p>ASK ALL</p> <p>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) OR HAFREN AND HAFREN: and sewerage) services? SINGLE CODE ONLY</p> <p>Not at all likely to recommend</p> <p>Extremely likely to recommend</p>	<p>0</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p>	
<p>ASK ALL WoCs (Q1a/11-24 AND HAFREN + WELSH) without septic tank (Q3/2)</p> <p>Q48b</p> <p>And on the same scale, how likely would you be to recommend ['insert code given at Q5a'] to friends and family as a provider of sewerage services?</p> <p>Not at all likely to recommend</p> <p>Extremely likely to recommend</p>	<p>0</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p>	
<p>Q154 AND Q155 PARKED</p>		

Section E: Speaking up for Water Consumers

Q49 – Q54 PARKED

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

D3, D5-D9 MOVED TO FRONT		
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		
<i>[Scale: 0 = none, 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 86= refused.</i>		
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 £10,000 1 £10,000 to £19,999 2 £20,000 to £29,999 3 £30,000 to £39,999 4 £40,000 to £49,999 5 £50,000 to £74,999 6 £75,000 to £99,999 7 £100,000 or more 8 Don't know 85 Refused 86	
ASK ALL Q58 And are you/someone in your household currently receiving any benefits or tax credits? SINGLE CODE	Yes 1 No 2 Don't know 85 Refused 86	
ASK ALL Q59 What type of accommodation do you live in? READ OUT SINGLE CODE	Owner occupied 1 Private rental 2 Council tenant 3 Housing Association tenant 4 Leaseholder 5 Don't know 85 Refused 86	
ASK ALL Q60 Would you say you live in an urban or rural area? READ OUT.SINGLE CODE	Urban 1 Rural 2 Suburban/semi rural 3 Don't know 85	
ASK ALL WHO ANSWER NO/DK AT D4NEWb (D4NEW_2/2,86). PN autofill to 'Yes" (code 1) for those who are D4NEW_2/1. Q61 Do you have access to the internet?	Yes 1 No 2 Don't know 85 Refused 86	
ASK IF CODED 3 AT Q21 OR Q25. OTHERS GO TO Q63 Q62 You said you would like to know more about additional services from your water company. To find out more, you can call ['insert code given at Q1a'] on [RELEVANT NUMBER FROM TABLE BELOW].		

ASK ALL		
Q63 Would you be happy to be re-contacted for future research projects on behalf of CCWater?		
Yes	1	
No	2	

Thank you for sparing the time to take part.

This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer. Should you wish to contact the Consumer Council for Water you can call their national enquiries line on 0121 345 1000 or visit their website at www.ccwater.org.uk

Should you want to contact the MRS (the Market Research Society) to verify that DJS Research comply with the code of conduct you can call them on 0500 39 69 85.



The voice for water consumers
Y corff sy'n rhoi llais i ddefnyddwyr dŵr

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