⁻he voice for water consumers (corff sy'n rhoi **ll**ais i ddefnyddwyr dŵr

Water, water everywhere?

Water & Wastewater Resilience Report 2019/20



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Overview

Within this report, we consider the resilience of both the water service and sewerage service, by looking at the performance of companies over the 2019-20 period in the key service areas that can have a big impact on consumers.

These are water usage, sewer flooding, leakage, supply interruptions, metering, and water quality. The report gives an overview of performance in the sector, identifying poor performing companies as well as examples of good practice that can be shared across the industry. The data contained within this report has been supplied directly to us by companies, unless otherwise stated¹. All company specific data is included in the appendices of this report for reference.

Key Highlights

- Daily water usage has reduced, but only slightly by 1% – this is a small step in the right direction, but there is still a big challenge for companies, with water resources under increasing pressure. Companies need to engage meaningfully with consumers, explaining the bigger picture message on climate change and population growth to encourage consumers to take steps to use water more efficiently.
- Performance in sewer flooding, both inside and outside the home, has declined, with incidents increasing over the last year by 14% and 15% respectively. We want to see companies taking a more proactive approach to sewer flooding - building resilience into their wastewater systems to prevent incidents from happening, rather than relying on responding well when it does occur.

- The amount of water lost through leakage on a per property, per day basis, reduced last year by 8%; this was a 7% reduction to the overall lekage level. While it's disappointing to see the same companies as last year among the worst performers, it's encouraging to see that improvements have been made overall, with only one company missing their target. We know that customers feel strongly about a lack of action on leakage, so we hope to see innovative approaches to ensure companies achieve future improvements to performance.
- The average amount of time that consumers were left without water reduced by 11% in 2019-20, to 11 minutes 45 seconds². By 2024-25, all companies have a target of 5 minutes, so there is still a lot of work to do on being better prepared for extreme weather events. Being able to prevent and manage these incidents effectively is important, so the least amount of disruption is caused to customers.
- The quality of drinking water across Wales and England remains very high. The Drinking Water Inspectorate's report³ indicates that the Compliance Risk Index has improved across both England and Wales over the last year. Although quality is high, we know not all consumers are happy with the quality of their drinking water. Companies need to ensure they do everything they can to address consumers' concerns.

Complaints performance for each of the companies are covered in different reports; these can be found here.

- ^{1.} The actual data submitted to CCW has been validated. CCW then normalised the data based on year end connection values, other organisations may publish information which is normalised differently.
- ² Supply interruptions are measured as the average supply interruption greater than 3 hours.
- ³ http://www.dwi.gov.uk/about/ annual-report/2019/index.html

Introduction

In recent years it has been hard not to notice the impact that climate change is having on the weather and, as a consequence, on our water and wastewater services. We have recently experienced how quickly the weather can change, from a long period of comparatively dry weather to one of the wettest winters on record. February 2020 was the wettest on record⁴, with a number of large storms in quick succession followed by an extremely dry Spring and the driest May on record for England and Wales. Resilience is about being prepared for these extremes in weather patterns, and reacting quickly when they do happen.



United Utilities - Following damage to a water main in the Eden Valley area of Cumbria, during storm Ciara in February 2020, the company used its fleet of alternative supply vehicles to keep supplies running for as long as possible during repairs. Although up to 8,000 households ultimately experienced a loss of supply for some duration of time – the time they were off supply was minimised, and interruptions were avoided entirely for a further 10,000 households. The company was very proactive in delivering water, and compensated customers as appropriate.

Dŵr Cymru Welsh Water communicated effectively and proactively with its customers during Storms Ciara and Denis when it was faced with multiple challenges in the provision of water and wastewater services, such as the shutting down of key water supply assets, localised flooding of communities, and landslides. Most notably Dŵr Cymru managed to maintain supply, whilst limiting interruptions and communicating effectively with the community and vulnerable customers, despite the extended period their water works was out of operation. The company received positive feedback from customers during the incident.

We expect companies to be able to cope with the impact that climate change is having, to be prepared for sudden changes, and to prevent disruptions to consumers' water and wastewater services. In 2019-20, we have seen scenarios where water companies have been able to react and respond positively to incidents.

Our annual Water Matters research - which tracks customers' perceptions of the services they receive - has shown that 74% of customers in England and Wales are confident that longer-term water supply will be available without restriction. We wanted to gain a better understanding of customers' views on this issue, so we also asked them why they feel the way they do. Many of the 74% of

⁴ https://www.metoffice.gov.uk/about-us/press-office/news/weather-and-climate/2020/2020-winter-february-stats

^{5.} https://nrfa.ceh.ac.uk/sites/default/files/HS_202005.pdf

^{6.} https://www.ccwater.org.uk/wp-content/uploads/2020/08/Water-Matters-Highlights-report-2019-2020.pdf

⁷ https://www.nic.org.uk/wp-content/uploads/Anticipate-React-Recover-28-May-2020.pdf



respondents who were confident about the longterm availability of supplies appear to be poorly informed about the state of water resources in the UK. For example, they cite, as a reason for their view, that it rains a lot, that they have never had any problems or that they live near a river or reservoir.

People generally base their views on their lived experiences. If there is no problem with their water supply, then they have no apparent need to inform themselves of the related issues. Companies need to understand what influences consumers' views and perceptions in this area if they are to raise awareness of the challenges they face and what they are doing to address these. Companies need to engage meaningfully on these issues if they want to encourage their customers to take positive steps to use water more efficiently.

A report⁷ published in May 2020 by the National Infrastructure Commission sets out that events causing widespread disruption and damage, such as the 'Beast from the East' in 2018 and flooding during the winter of 2019-20, will only increase with climate change. The report reiterates the longstanding message that a proactive approach to resilience is required. Companies need to adapt to these challenges, develop long-term resilience plans and carry out stress tests to ensure systems are resilient.

Looking back over the 2015-2020 price control period, there have been improvements to the water industry's overall performance. Leakage, supply interruptions, internal sewer flooding and external sewer flooding have all seen reductions. However, the performance measure that remains one of the biggest challenges for companies is reducing personal water usage, which has actually seen a 2% increase since 2015-16. With water shortages more likely in the future, the water sector needs to take significant and immediate action on this.

2020-21 will see the start of the new five-year price control period. Based on the companies' performance commitments on leakage, water use and supply interruptions, we expect to see big steps forward in resilience. With the performance commitment definitions changing for these same three metrics from 2020-21, this will be the final year that we are able to make comparisons between companies on the current definitions. We hope that going forward, the new definitions will ensure that we receive more consistent and reliable data from the companies, making it easier to make company comparisons.

Water Usage

Our changing climate and growing population are increasing the pressure on our water resources. A report published by the Committee on Climate Change⁸, suggests that if nothing is done about water availability in England and Wales, by 2050 there could be a potential gap of up to of 2.7 billion litres of water per day.

This year, the average amount of water that a person uses each day has gone down to 142 litres per person per day (I/p/d), from 143 I/p/d in 2018-19°; a decrease of 1%. Although slight, this is the first decrease in average water use since 2014-15. There was eight companies whose performance was better than the average in 2019-20: Hartlepool, Southern, South Staffs, Severn Trent, Cambridge, Yorkshire, Anglian and United Utilities.

Best Performers

Hartlepool - 126 l/p/d Southern - 127 l/p/d South Staffs - 128 l/p/d

Worst Performers

Dŵr Cymru Welsh Water - 160 l/p/d Affinity – 155 l/p/d Essex & Suffolk – 155 l/p/d



⁸ www.ukclimaterisk.org/wp-content/uploads/2020/07/Updated-projections-of-future-water-availability_HRW.pdf

^{9.} This is the weighted average based on connections

Over the last five years, there has been little movement on water usage, with an increase of 2%. Between now and 2024-25, companies are set to reduce water use by 517 million litres per day. Although some companies have started to take steps in the right direction, we are still concerned that not enough work is being done to encourage a reduction in personal water use. It could be that companies are not doing enough to help consumers use less water, or that the message is just not getting through.

Research carried out by CCW¹⁰ highlights the need to explain the bigger picture on climate change and population growth, in order to effect any meaningful change in consumers' views and behaviour around water use. This can help consumers to understand why they need to save water before telling them how. There needs to be a clear message that we all need to take action to help reduce the risk of water shortages in the future.

Companies need to ensure they provide practical advice and support to consumers who are willing to play a part in saving water. A lot of companies provide home water efficiency audits, offer water saving devices and give hints and tips on reducing water – but they need to engage more with consumers on this as people can have different motivations. Making the link between water saving and bill savings may appeal to some, for others it will be through helping them to understand how important this could be for the future of our water resources and our natural environment.



As part of **Anglian's** long-term water demand strategy the company has plans to upgrade and install 760,000 smart meters in homes and businesses over the next five years¹¹. This follows a successful trial in Newmarket; where the whole town's consumption reduced by 8% over 12 months following the introduction of metering.



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ing-customers-see-the-bigger-picture/ er-efficiency-initiative-coming-to-the-east/ Covid-19 is likely to play a part in the water usage figures we see next year. We know that recent demand has increased by nearly a third above normal daily averages¹² as a result of both the pandemic and the warm weather experienced in April and May. With more people working from home, and not going away during the summer months, there has been an increase to water use in the home. As we found out when we asked our online community, WaterVoice¹³, people were washing their hands, cleaning the house, doing the laundry, and putting the dishwasher on, more during the Covid-19 lockdown than they would do normally.

The National Framework¹⁴ launched by the Environment Agency in March 2020, brings together industry, regulators and government with the ambition of transforming the way we plan, use and look after our water supplies in England. Regional plans, created by five regional groups will set out how supply and demand will be balanced over the longer term. There is a planning assumption that personal water use can be reduced to 110 litres of water per person per day by 2050, alongside further significant reductions in leakage. However, these water savings alone do not close the gap between our future needs and available supplies, particularly in the already water stressed areas - it will still be necessary to develop new supplies and transfer water across regions. It's the responsibility of water companies to use the framework to work collaboratively, to ensure resilient water supplies.

Water Usage by Non-Household Customers

There is also potential for greater water efficiency among business customers, who use a third of all the water consumed in England¹⁵. Around 80% of business customers use a similar or lesser amount to household customers, so the messaging and practical support for water efficiency could also be effective here. With the remaining 20% of these customers accounting for nearly 90% of this consumption, there is a big opportunity for them to contribute to bringing overall water usage down. Retailers need to ensure that they are targeting their customers with the right messaging, advice and support in order to achieve this.

- ^{12.} https://utilityweek.co.uk/water-firmssee-demand-rise-third-lockdown/
- ^{13.} https://www.ccwater.org.uk/wp-content/ uploads/2020/07/WaterVoice-June-Report.pdf
- ^{14.} https://www.gov.uk/government/publications/ meeting-our-future-water-needs-a-nationalframework-for-water-resources
- ^{15.} https://www.mosl.co.uk/news/details/big-ideas--the-water-report-interview-with-sarah-mcmath

Metering

In 2019-20, all companies increased the number of households who have been metered to 57%, a 3% increase from 2018-19. It tends to be the case that household customers with measured bills use less water than those customers on unmeasured bills. This year, customers on unmeasured bills used an average of 166 litres per person per day, compared to 126 litres per person per day for measured customers¹⁶.

Although metering is a useful tool to help encourage lower water use by helping customers understand their usage, it needs to be used in conjunction with other measures, such as water labelling and messaging leading to behaviour change, in order to achieve the reduction that is needed. Water labelling refers to the labelling of fittings, fixtures and appliances to give an indication of how water efficient the product is. We support the option of making this mandatory, as it will help consumers make an informed decision when chosing a washing machine, or dishwasher for example, so they have an opportunity to pick a more water efficient product.

Metering is not, on its own, the single solution to reducing overall water use. However, used in the most effective way, there are a number of other benefits to using meters, particularly smart ones. Companies are starting to invest in and trial smart meters to assist with reducing leakage and detecting any other abnormalities in their network.





Although **Thames Water** still has a long way to go on the leakage front, it has now installed almost 450,000 smart meters across the network. This has helped the company to monitor water usage patterns and spot where leaks are occurring. This has been particularly focussed on customer supply pipes, prompting the company to write to the customer if they detect a potential leak, explaining what could be happening and giving them options to fix it. It seems that customers have been very quick to react to fix the leaks, which has assisted with the company's 14% overall leakage level reduction over 2019-20.

Data coming through from smart meters will give companies an idea of usage patterns, and help to detect customer-side leaks. We continue to press companies to really understand consumers and their usage to provide targeted communications and help with reducing their water use.

Over the 2020-25 period, companies will invest £650 million in installing at least 2 million new water meters to help consumers reduce consumption. We expect companies to use the insights they gain from this to drive a step change in reducing leakage and consumption.

^{16.} This is the weighted average based on connections.

Leakage

Tackling leakage is key to reducing the amount of water that is wasted across England and Wales. Companies need to be able to quickly spot and respond to leaks, to minimise the water escaping from pipes. Consumers become frustrated when leaks are left unrepaired, and this can weaken the impact of company messaging around water efficiency. Fixing leaks - particularly visible leaks - needs to be a high priority for water companies to help reinforce messages to consumers to value water.

Over the next five years, water companies have committed to reducing leakage by 16%, which is equal to 461million litres per day¹⁷. If companies are successful with this, it will help improve consumers' perceptions of the water companies and motivate consumers to waste less water. Innovation is key here – companies need to find new methods in order to achieve the reductions that are required.

All companies, except Southern Water, have achieved their annual leakage targets for 2019-20. Southern had a five year target (2015-2020), and has confirmed that it has missed this.



Portsmouth Water has seen big improvements in its leakage performance, which the company puts down to investment in new technology¹⁸. By investing in acoustic loggers to listen to the flow of water, the company can identify the location of a leak and take action to fix it more quickly. By doing this, the company has been able to reduce its overall leakage level from 28.1 Ml/d in 2018-19 to 23.6 Ml/d in 2019-20.

Best Performers

Bristol - 68 l/p/d Portsmouth - 73 l/p/d Essex & Suffolk - 77 l/p/d

Worst Performers

Thames - 152 l/p/d United Utilities - 132 l/p/d Hafren Dyfrdwy - 121 l/p/d

Leakage per property, per day

We report leakage on a litres per property, per day basis (litres/property/day), as this provides a better basis for comparing companies' relative leakage performance.

2019-20 has seen an 8% reduction in leakage per property, with an overall average of 112 litres/ property/day, a big jump down from 121 litres/ property/day the previous year. Bristol Water and Essex and Suffolk remain in the top three best performers for the second year; with 68 litres/ property/day and 77 litres/property/day respectively. Joining them is Portsmouth Water, which has seen a significant reduction over the last two years with 73 litres/property/day – this is a 30 litre improvement on its performance in 2017-18.



It is disappointing to see that 2018-19's worst performers on leakage remain in the bottom three this year: Thames (152 litres/property/day), United Utilities (132 litres/property/day) and Hafren Dyfrdwy (121 litres/property/day). Although Thames remains the worst performer, it has successfully achieved its target for 2019-20 and has delivered a 15% reduction; a 26 litres per property, per day improvement on its performance in one year. We welcome this significant improvement and hope Thames Water continues to drive leakage down over the next five years.

United Utilities has over achieved its target, by 16.5 Ml/d, but they remain as the second worst performer for both leakage measures – litres/ property/day, and overall leakage level.

We have also seen a 16% reduction from Hafren Dyfrdwy over 2019-20, and welcome plans to reduce leakage in the next five years. However, we have concerns over the resilience risk particularly in its Powys area. In addition to the company's plan to make improvements on leakage, we now need to know how the company plans to think of innovative ways to improve its operational performance for consumers.

 ^{19.} For South West Water, the total leakage data is based on calendar year. Leakage per property served is based on financial year to align with data provided to WaterUK for the Discover Water website. For all other companies, both overall leakage and leakage per property served is based on financial year.
^{20.} https://www.water.org.uk/wp-content/uploads/2019/04/Public-Interest-Commitment-2.pdf

^{17.} https://www.water.org.uk/wp-content/uploads/2018/11/A-Manifesto-for-Water.pdf ^{18.} https://utilityweek.co.uk/portsmouth-cuts-leakage-lowest-level/

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Industry Overall Leakage Levels

Overall Leakage Levels

The overall leakage level has reduced by 7%, from 3,169 Megalitres per day (MI/d) in 2018-19 to 2,950 MI/d in 2019-20¹⁹. The biggest reductions were seen by Affinity Water (-17%), Portsmouth Water (-16%) and Hafren Dyfrdwy (-16%). This was a positive improvement for Affinity as last year we highlighted its increase in leakage. There are a couple of companies who have seen an increase this year: Hartlepool (+4%) and Bournemouth (+0.2%). Both of these companies have amongst the lowest levels of overall leakage but the increase does demonstrate that companies should not become complacent with their good performance.

It is encouraging to see companies finally making an improvement on leakage, compared to the static performance we have seen over the last eight years. Water Companies have also agreed to work together to achieve WaterUK's five Public Interest Commitments (PIC)²⁰; a number of goals to encourage companies to play a wider part in society. One of these is to triple the rate of sectorwide leakage reduction by 2030. We challenge companies to use innovation and trial new methods for tackling leakage, as we know this will help the industry to meet the leakage PIC and achieve the ambitious targets they're set to hit by 2024-25.

Supply Interruptions

Being able to cope with extreme and unpredictable weather - more frequent due to climate change – is more important than ever before. We have been pushing companies to be better prepared and more able to manage a range of potential events, which in turn will help to prevent long periods of time where consumers are left without a water supply.

Companies need to build resilience and invest in their networks to reduce the risk of interruptions happening in the future. They should ensure they understand their networks better to be able to manage incidents more effectively and prevent consumers experiencing a disruption to their water supply. The ability to manage disruption should include providing excellent support to customers, particularly those who are in need of the extra help. Although there have been some significant weather events in 2019-20, we've been fortunate not to have experienced a repeat of the 'Beast from the East'. Water UK has led the work on reviewing lessons learnt from this incident regarding water supplies²¹ - working with companies on their own internal approaches to managing extreme events. Companies need to plan and be ready for all possible eventualities, as we saw earlier this year with Covid-19. Companies responded very well to this, and adapted quickly to operating differently under these unusual circumstances.

Ofwat has set all companies a target to reduce supply interruptions to no more than an average of 5 minutes²² by 2024-25. With five companies already below this target, we question whether this is stretching enough to drive continuous improvement and ensure that these companies don't get complacent.

^{21.} https://www.water.org.uk/wp-content/uploads/2019/10/Water-UK-Freeze-thaw-4-10-2019.pdf
^{22.} Supply interruptions are measured as the average supply interruption greater than 3 hours.

Best Performers

Hartlepool - 0 mins SES - 1 min 25 secs South Staffs - 2 mins 14 secs

In 2019-20, the average amount of time that consumers were without water decreased from 13 minutes 14 seconds in 2018-19 to 11 minutes 45 seconds; a reduction of 11%. However, looking at longer term performance, other than 2017-18, performance in this area has remained static over the last five years.

The big increase for Anglian Water (+110%), was mainly caused by a three-day water outage in the Leighton Buzzard area. The incident exposed a number of issues with the network that the company has already taken remedial action on. We were pleased to note the work done during the incident to protect consumers in vulnerable circumstances and to promote the Priority Services Register to those who would benefit. However, three days is a long time to be without



Supply Interruptions - Industry Average



Worst Performers

Thames – 22 mins 3 secs Anglian- 19 mins 2 secs Hafren Dyfrdwy - 16 mins 53 secs

a supply of water. This is an example of where companies should be building resilience into their network, in order to prevent a disruption like this from impacting consumers.

Thames and Hafren Dyfrdwy were also amongst the worst performers for supply interruptions in 2018-19. Although Hafren Dyfrdwy have seen a reduction of -42% for 2019-20, this repeat poor performance is not acceptable for consumers, particularly as being left without water causes great inconvenience. We expect both Thames and Hafren Dyfrdwy to be reviewing their plans, operational response and staff training to ensure that any weak spots are identified, and improvements are put in place in order to bring these numbers significantly down. This is something that we will continue to monitor, and report on next year.



2019-20

Sewer Flooding

Sewer flooding can be devastating for those customers who are unfortunate to experience it. It can happen inside the home, or outside people's properties, and can be caused by a number of situations such as heavy rainfall and flooding, or a blockage in the system.

Flooding inside the home

This year, 3,713 properties were flooded internally; this was an increase of 14% from 3,252 properties in 2018-19²³. Over the last five years there has been an overall 11% reduction in the total number of properties flooded internally; but an increase of 14% in a single year is unacceptable for consumers. It has been a wet year, with a number of large storms, but we expect companies to be working towards protecting customers from the impact of climate change. Companies should be able to better predict these extreme and more common weather events, and manage them to prevent sewer flooding from occurring. Only Wessex, Southern and Thames have seen fewer incidents during 2019-20; all other companies have seen an increase in the number of internal flooding incidents.

Best Performers*

Wessex – 0.57 **Anglian** – 0.67 Northumbrian - 0.97

Worst Performers*

United Utilities – 2.99 **Yorkshire** – 1.75 **Thames** – 1.63

X

Flooding outside the home

Incidents of external flooding have also increased by 15%, from 23,489 in 2018-19, to 27,127 in 2019-20. Similarly to internal flooding, this has decreased over the last five years by 22%, but an increase of 15% in one year is significant. All companies, except for Northumbrian and South West Water, saw an increase to the number of external flooding incidents. Northumbrian has seen a 41% reduction over 2019-20. The company has undertaken a review of how it responds to flooding incidents, focusing on its preparations before heavy rainfall impacts the sewerage system; this has helped the company to protect customers from external flooding.



Worst Performers*

Southern – 24.28 Hafren Dyfrdwy - 18.79 Yorkshire - 17.83

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Internal Sewer Flooding Incidents





External Sewer Flooding Incidents



It is disappointing to see that performance in this area is still dependent on the weather over the course of the year. We will be looking to companies to build more resilience into their wastewater systems to ensure they are able to cope with the increased likelihood of more extreme weather patterns in the future. We would like to see companies demonstrating that they are working closely with other organisations who have responsibility for flooding, using natural solutions to managing rain water to keep it out of sewers and reducing blockages.

By next year's report, new guidance published by Ofwat will have helped to improve the consistency of sewer flooding data reported and make it easier for us to carry out comparisons of performance across companies.

By the end of 2022, water and sewerage companies in England and Wales have agreed to produce Drainage and Wastewater Management Plans. These are the new way to plan for the future of drainage, wastewater and environmental water quality. The plans will provide the basis for more collaborative and integrated long-term planning by organisations that have interests and / or responsibilities relating to drainage, flooding and protection of the environment. These plans will hopefully lead to better solutions to flooding and lower costs to water customers. We are working with companies on the development of these plans, which will require companies to work with other organisations and customers to ensure that there is a collaborative approach to resolving flooding issues.

We are also working with a wide range of organisations to help consumers reduce the number of blockages caused by inappropriate items flushed down the toilet and kitchen sink. The aim of this is to reduce the number of customers' homes flooded with sewage as well as protecting the environment. The industry has made positive steps to raise awareness and coordinate a national campaign on the issue of sewer misuse. Anglian Water, supported by United Utilities, held a workshop in January 2020 bringing together a wide range of organisations to look at ways to tackle the problem, raise awareness, change customer behaviour and develop products that will not cause blockages. This was a step in the right direction but we are concerned that this project will not move forward as we hoped.

The industry needs to continue to inform consumers, at a national and local level, of what can and can't be flushed down the toilet, which could help to prevent sewer blockages from occurring. We are very pleased with the progress of the "Fine to Flush" testing process for wet wipes, which has helped manufacturers and retailers develop products that can be safely flushed without causing blockages. We look forward to working with Water UK to develop a strategy that will take forward a national campaign for sewer misuse issues that is backed up by a long term plan and properly funded.

Drinking Water Quality

The recent Covid-19 outbreak gave us all a reminder of how important it is to have clean water at the turn of a tap at any time of the day or night – providing us with the ability to wash our hands regularly, maintain general cleanliness and keep hydrated.

Consumers need to be able to trust the quality of their drinking water. Drinking Water across England and Wales is regulated by the Drinking Water Inspectorate (DWI) and stringently tested by water companies to ensure compliance with the standards outlined in The Water Supply (Water Quality) Regulations 2016 (England), 2018 (Wales).

Each year the DWI publishes a report²⁴ for England and Wales which reviews whether water companies and local authorities have taken the appropriate action to maintain confidence in drinking water quality and to safeguard public health. The performance of the water industry is measured by the Compliance Risk Index. This measures the risk where there has been a compliance failure by the company – based on the significance of the failure, the proportion of consumers potentially affected and an assessment of the company's response. Companies should be aiming for the lowest score possible.

For 2019, the industry CRI in England and Wales was 2.87, an improvement in performance from 3.87 in 2018 and 3.56 in 2017. This is also broken down for Wales, at 3.73 and England, at 2.80. This shows that performance has improved by a greater margin in England.

South Staffs Water, Southern Water, Severn Trent Water and Affinity Water all saw significant improvements in their CRI scores. There was however noticeable deterioration in the CRI scores for Yorkshire Water, Bristol Water, Cambridge Water, South West Water, Northumbrian Water and United Utilities who are all now above the industry median. Southern



Water were also highlighted for continuing to have a significantly high CRI score of 7.66.

One of the concerns that is particularly prominent in Wales is discolouration. The number of contacts received by companies in Wales in relation to discolouration, is three times the average number of contacts received by the rest of the industry. The DWI report that while Hafren Dyfrdwy and Dŵr Cymru Welsh Water, have both shown improvements on this since 2018, Dŵr Cymru Welsh Water continues to receive the highest number of customer contacts per 1,000 population. We expect both companies to be working with the DWI and taking appropriate measures to reduce these contacts and ensure that consumers are happy with the appearance of their water.

When customers complain about the quality of their drinking water, particularly the taste, appearance and odour, companies need to do more to address customers' concerns. Investigating the source of the problem, and finding a potential solution to the dissatisfaction will help consumers have more confidence in their supply of drinking water.



Conclusion

With the impacts of both climate change and population growth, the pressure is growing on the water industry to innovate and collaborate to ensure that water and wastewater services are fully future proofed. Companies also need to respond quickly to issues here and now particularly managing more regular extreme weather events - to ensure that current consumers are also protected from poor performance.

For water services over 2019-20, we have seen improvements to performance; but this has either been marginal, or where there has been static performance and something we've been calling for for a while. The performance for wastewater services has been disappointing, with a significant increase in flooding incidents. The reality we face is that climate change is already having an impact on our water and wastewater services, and this is why the water sector needs to take action now. With the water industry being one of the leading sectors for reducing carbon emissions, we would like there to be as much emphasis and effort placed on building resilience to climate change. We have written to all water companies to call on them to produce a Climate Change Adaptation report, to give consumers confidence that their water company is taking action on one of the biggest challenges we currently face. We will be analysing all companies' reports from a consumer perspective once they are available, and plan to publish our findings.

We hope that the business plans and performance targets set over the next five years, provide enough challenge to encourage companies to strive for improved performance in both water and wastewater services. We look forward to seeing them innovate and collaborate to come up with new and improved solutions to tackle some of the issues that affect the water industry today as well as in the future. Daily water use since last year

-1%

Water Usage

A decrease in daily water use of 1% is a small step in the right direction, but there is still a long way to go. Companies need to ensure that consumers are taken along on this journey, with more regular and targeted communications, to help them appreciate the value of water in their everyday lives and use it wisely. Metering can help , but will need to sit alongside other measures to bring about the big step change that is needed over the next five years.

> External sewer flooding since last year

+15%

Sewer Flooding

Internal sewer

flooding since last year

+14%

Our concerns with the water industry's performance on sewer flooding are greater than ever, with a 14% increase to internal flooding, and a 15% increase to external flooding. Sewer flooding is something that no consumer ever wants to experience, and companies should be doing everything they can to prevent these incidents from occurring, building more resilience into their wastewater systems.



Leakage

This has seen a welcome reduction in 2019-20, both in terms of the total amount of water lost (-7%) and on a per property basis (-8%). Companies need to adapt the way they tackle leakage, innovate and share best practice to be able to achieve the targets that have been set for them over the next five years.

> Supply interruptions since last year

-11%

Supply Interruptions

Although an 11% improvement, consumers are still experiencing more interruptions than they should, and companies' performance in this area is still not good enough. Companies have a long way to go to meet much tougher future targets, and they should be preparing and testing their plans in order to mitigate any potential disruption to supplies.



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

Contact us

CCW, 1st Floor, Victoria Square House, Victoria Square, Birmingham, B2 4AJ.

0300 034 2222 in England **0300 034 3333** in Wales

