Customer spotlight: People's views and experiences of water

Prepared for CCW and Ofwat
April 2022

Savanta:

Research aims and methodology

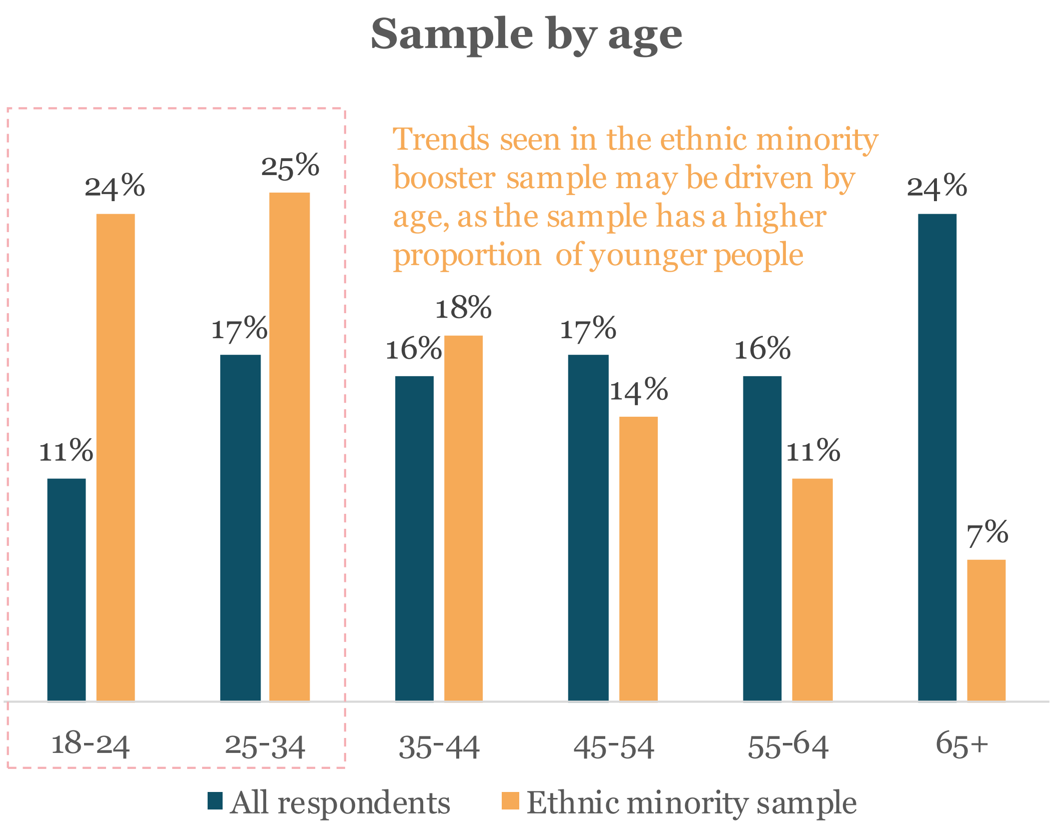
CCW, the statutory consumer organisation which represents the interests of water and sewerage consumers in England and Wales, and **Ofwat**, the economic regulator of the water and wastewater sectors in England and Wales, jointly commissioned this research to develop insights on consumers' knowledge, actions and behaviour to inform communications and policy work.

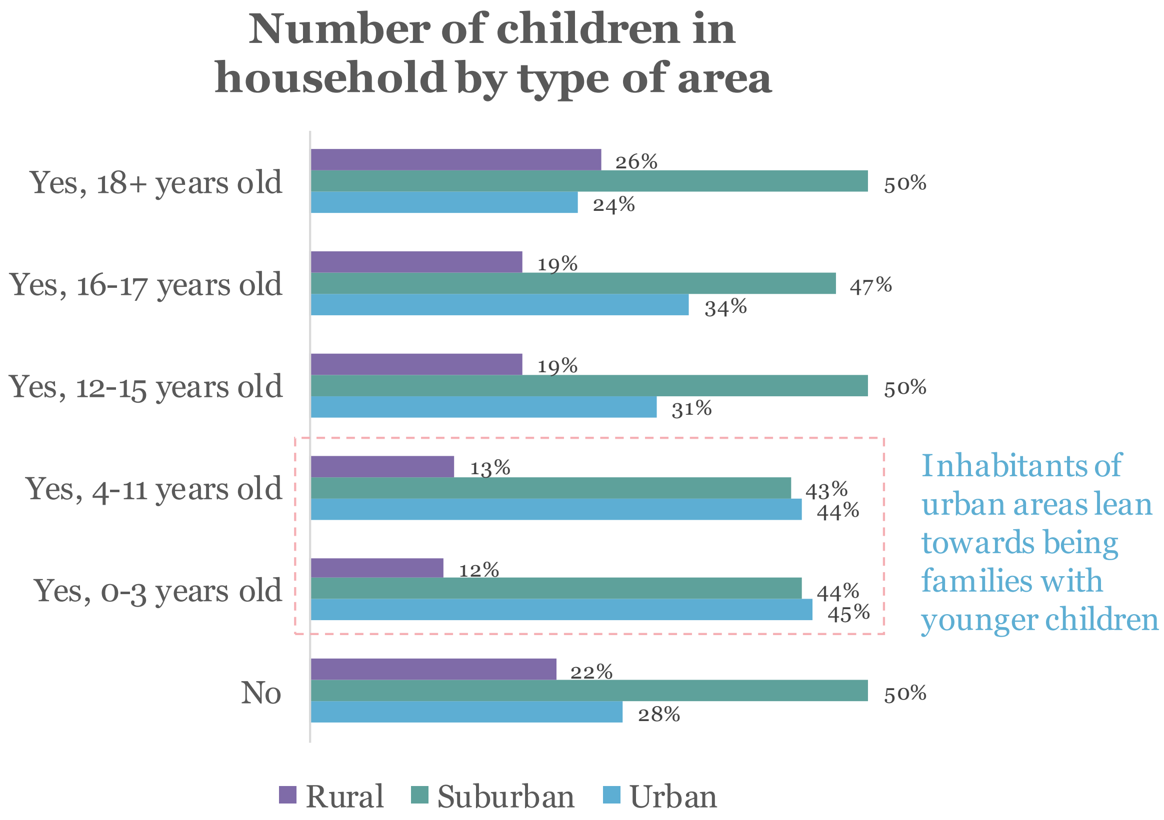
From the 23rd November to the 14th December, Savanta surveyed 2,951 respondents via an online survey. 2,116 respondents were based in England and 507 respondents were based in Wales. The sample was weighted to be nationally representative. An additional boost sample of 328 participants from ethnic minority communities was surveyed at the same time to ensure analysis could be conducted to understand this audience’s view. Throughout the report the main data sample is used to report findings however, where the ethnic minority data is referred to this includes the ethnic minority booster sample and the ethnic minority respondents from the main survey, making a total base of 600 respondents.

A telephone survey, which was not nationally representative, was conducted from the 4th to the 18th October with 100 ‘digitally disenfranchised’ respondents who were defined as those being less comfortable using online tools and would therefore be less represented in the online survey sample.

Observations on the sample

While we have pulled out various aspects of the data, there were several drivers to any sample, for example:

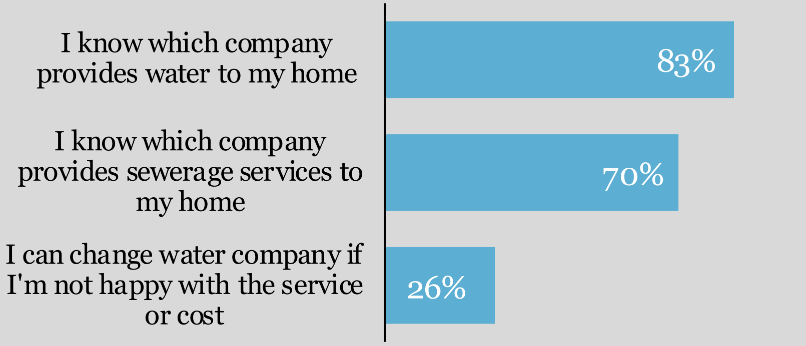




Age. How old are you? Base: All respondents (n=2,623), Ethnic minority respondents (n=600)
RURAL/URBAN. How would you describe the area you live in? Base: All respondents (n=2,623)

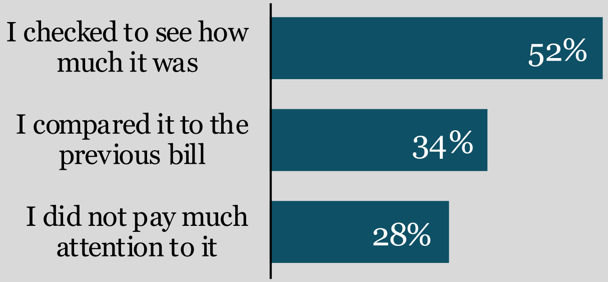
Customer spotlight: People's views and experiences of water

Consumers' **understanding** of the water industry



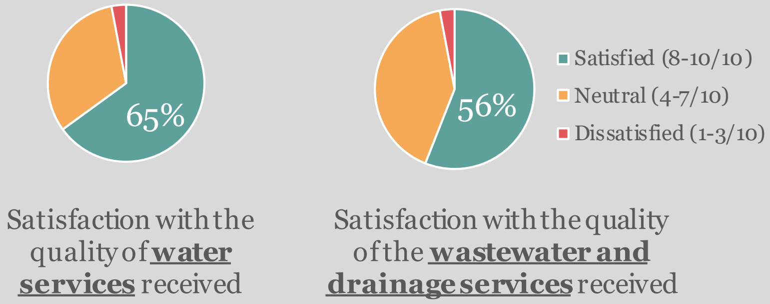
% agreeing with each statement (selecting strongly agree/agree)

Consumer's **engagement** with household water bills

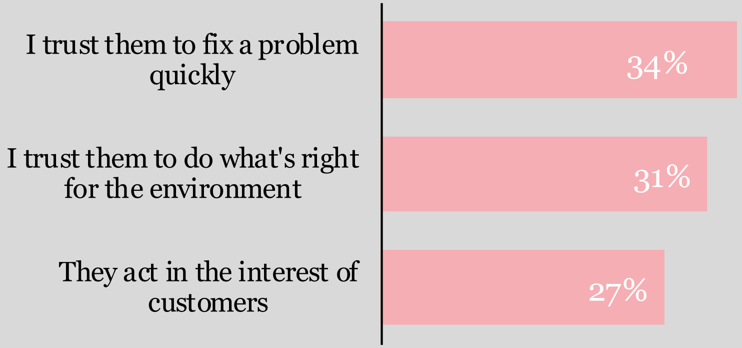


Showing top three results, other responses were selected by less than 10% of consumers

Consumers' **satisfaction** with their water provider

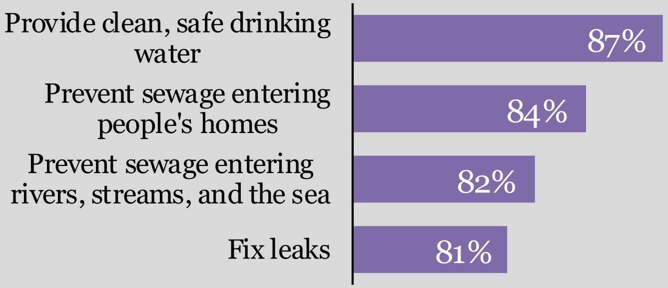


Consumers' **trust** in their water provider



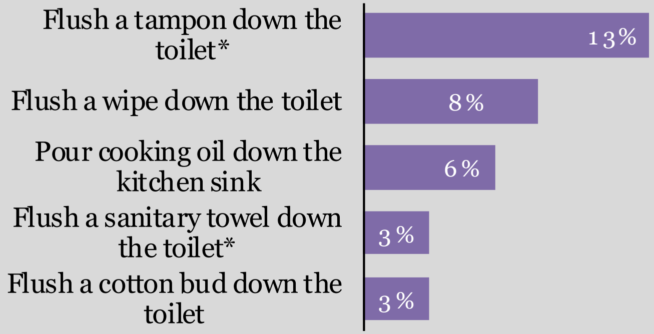
% selecting 8-10/10

Consumers' **priorities** for their water provider to focus on in the future



% believing each statement is an important future priority for water companies (selecting 8-10/10)

Consumer **behaviours**



% doing this most of the time or every time

*Only asked of women aged under 55.

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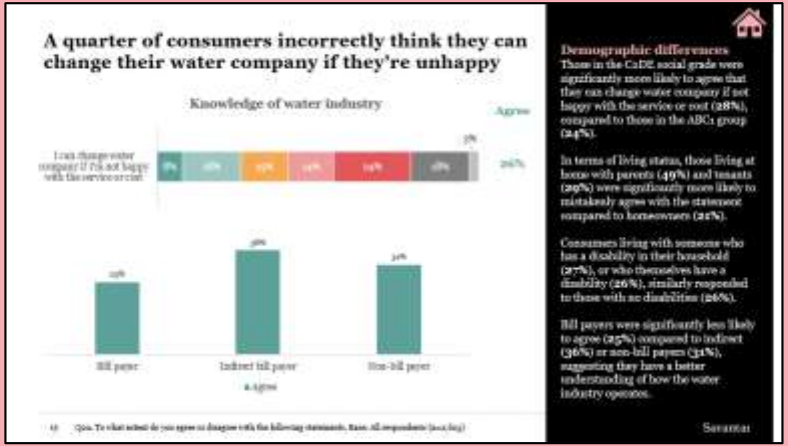
A note on the sub-group analysis in this report

This report features analysis by these factors to provide the views of consumers from all walks of life. We have highlighted the differences by these factors in this report where they are significantly different to one another…

Region	Age
Gender	Socio-Economic Grade (SEG)*
Household composition	Disability
Bill paying	Digital (dis)enfranchisement
Water metering	Ethnicity

In addition to that, we have provided an analysis by key demographic factors for 'key indicator' questions. These questions collectively provide a view on people's views and experiences of water, and it is therefore important to see if the results differ by key audience groups (or not).

'Key indicator' slides feature a black bar on the right-hand side which includes analysis by each of the key audience groups, entitled 'demographic differences'. We have included an example below of what these slides look like so you can look out for these as you read through the report.



*In this report we will compare ABC1 (higher SEG/more affluent people) with C2DE (lower SEG/less affluent people)

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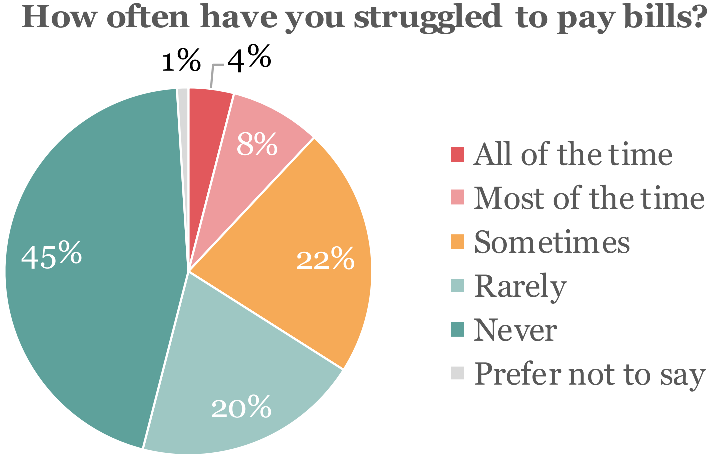
Contents

1. Financial circumstances in England and Wales

A third struggle to pay their bills at least some of the time and a similar proportion think their financial situation will worsen next year



One in eight (**12%**) have struggled to pay their bills most or all of the time in the last 12 months. A further fifth (**22%**) have sometimes experienced this.

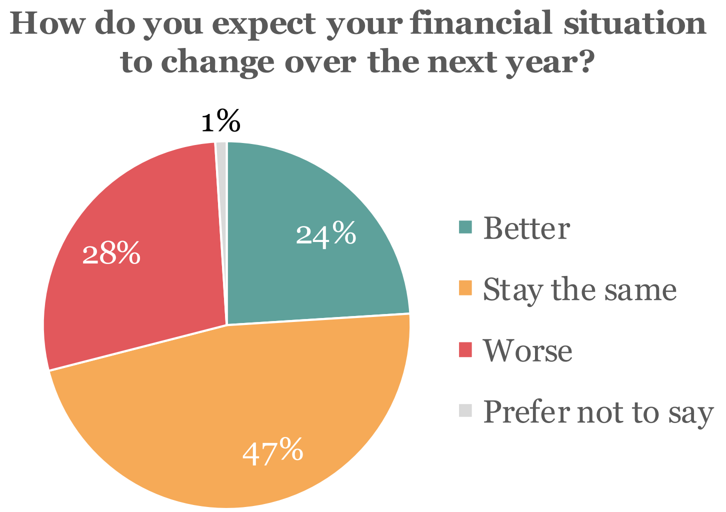
Conversely, two thirds (**65%**) have rarely or never experienced struggling with bills in the last 12 months. This is higher for males (**73%**) than females (**58%**). Younger consumers were also much more likely to have struggled with bills: only **47%** of 18-34 year olds have rarely or never experienced this, compared to **84%** of 55+ year olds.

Those who have a water meter were significantly less likely to have struggled all or most of the time, when compared to those who do not have a water meter (**10%** vs **14%**).

A broadly equal proportion of those in England and Wales think their financial situation will improve over the next year (**24%**) as think it'll worsen (**28%**).

However, this is not the same across all groups within the population: **56%** of digitally disenfranchised respondents and **41%** of those living with a disability say they expect their financial situation to get worse over the next year.

Conversely, some of the most optimistic groups were those in London (**38%**) and 18-34-year-olds (**40%**).



Q5. Thinking about your finances over the last year, how often, if at all, have you struggled to pay bills? Base: Bill payers (n=2,327)
Q6. Thinking about your financial situation over the next year, do you expect it to get… Base: All respondents (n=2,623), Digitally disenfranchised respondents (100)

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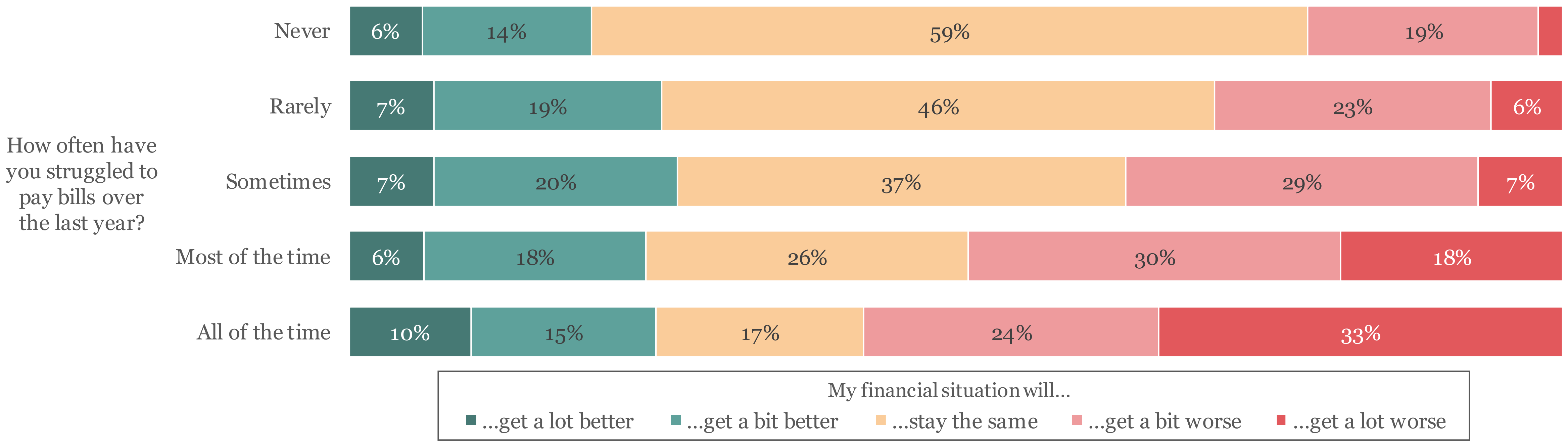
The more that consumers currently struggle to pay bills, the more likely they are to believe their financial situation will worsen in the future



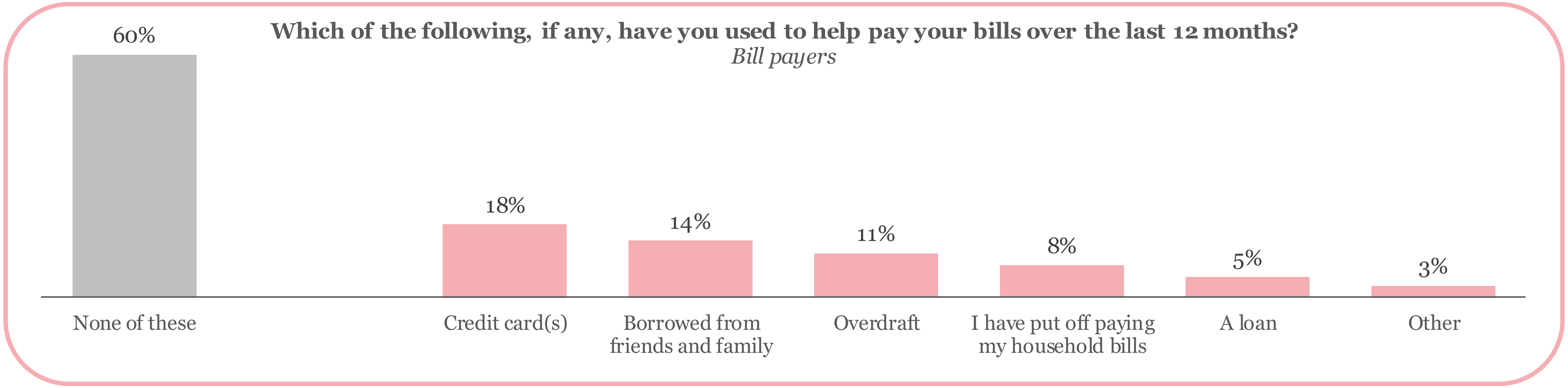
Regardless of how frequently consumers currently struggle to pay their bills, optimism about the future is both comparable and limited. One in five (**20%**) of those who currently never struggle with their bills believe their financial situation will improve, compared to one in four (**26%**) of those who struggle all of the time.

Pessimism about their financial future is much more prevalent among those who are currently struggling to pay their bills. Over half (**57%**) of those that experience this 'all of the time' expect their situation to worsen, compared to only one in five (**21%**) of those who never currently find themselves in this situation.

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q5. Thinking about your finances over the last year, how often, if at all, have you struggled to pay bills? Base: Bill payers (n=2,327)
Q6. Thinking about your financial situation over the next year, do you expect it to get... Base: All respondents (n=2,623)

In order to pay their bills, two in five bill payers have had to access additional financial credit



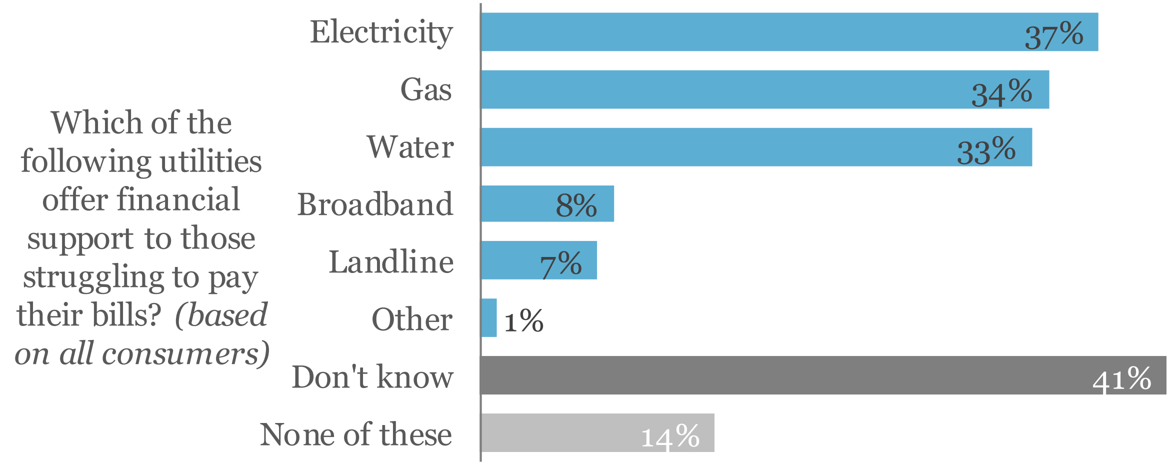
Three in five (**60%**) bill payers have not used any of the above forms of credit to pay their bills. This figure is higher for consumers in rural locations (**66%**), those who own their own homes (**71%**) and 55+ year olds (**78%**).

Using credit cards (**18%**) and borrowing from friends and family (**14%**) were the most common forms of credit used to pay bills. Among ethnic minority respondents, these figures were higher: **23%** and **20%** respectively.

Those that have struggled 'all of the time' to pay bills in the last 12 months were more likely to have used credit cards (**35%**), borrowed from friends and family (**55%**), used their overdraft (**30%**) and put off paying other bills (**41%**).

Q7 . Which of the following, if any, have you used to help pay your bills over the last 12 months? Base: All respondents (n=2,623), Bill payers (n=2,327)

Just under half (45%) were aware that utilities providers offer financial support to those struggling to pay bills

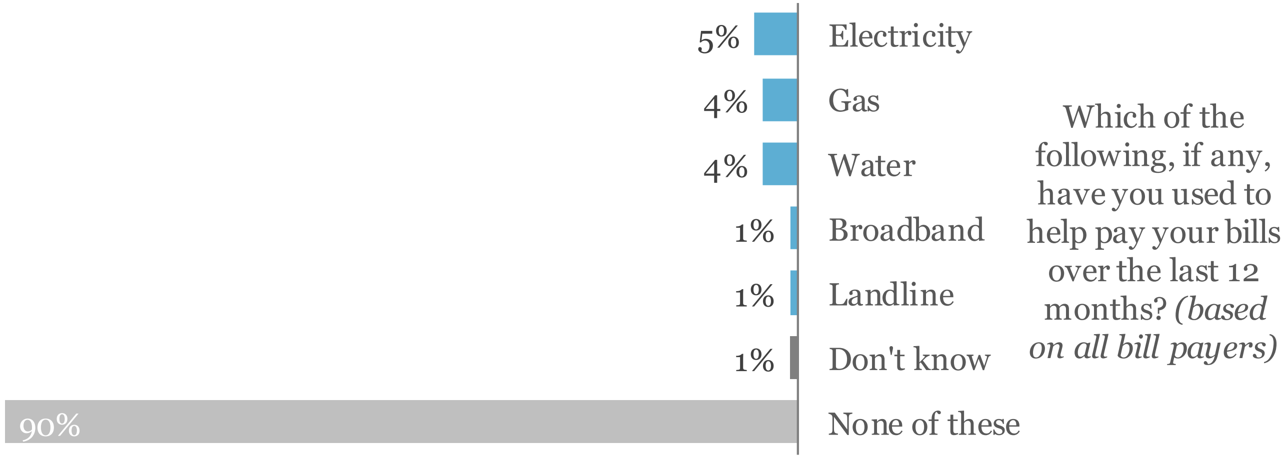


Just under half (**45%**) of the public were aware of financial support being offered by at least one utility provider. This falls to **28%** among those who do not currently pay the bills in their home.

The proportion of consumers that were aware of electricity (**37%**), gas (**34%**) and water (**33%**) providers offering financial support is similar, and considerably higher than broadband (**8%**) or landline (**7%**) providers. Those who have requested water meters to be fitted in their homes (**40%**), those in single-adult households (**42%**) and those who said they struggled to pay their bill all the time over the last year (**42%**) were more likely to be aware that water providers offer this.

One in ten (**9%**) of bill payers say that they have utilised help from one of these five utilities to help pay their bills over the last 12 months. Electricity (**5%**), gas (**4%**) and water (**4%**) were the most common sources of help.

A fifth (**20%**) of those who have struggled to pay bills 'all of the time' in the last 12 month report receiving financial support from their water supplier. One in ten (**11%**) of bill payers on the Priority Services Register have also received this.



Q8. To the best of your knowledge which of the following utilities, if any, offer financial support to those struggling to pay their bills? Base: All respondents (n=2,623)
Q9. Which of the following utilities, if any, have you received financial support from during the last 12 months? Base: Bill payers (n=2,327)

Key insights into the financial circumstances of consumers in England and Wales

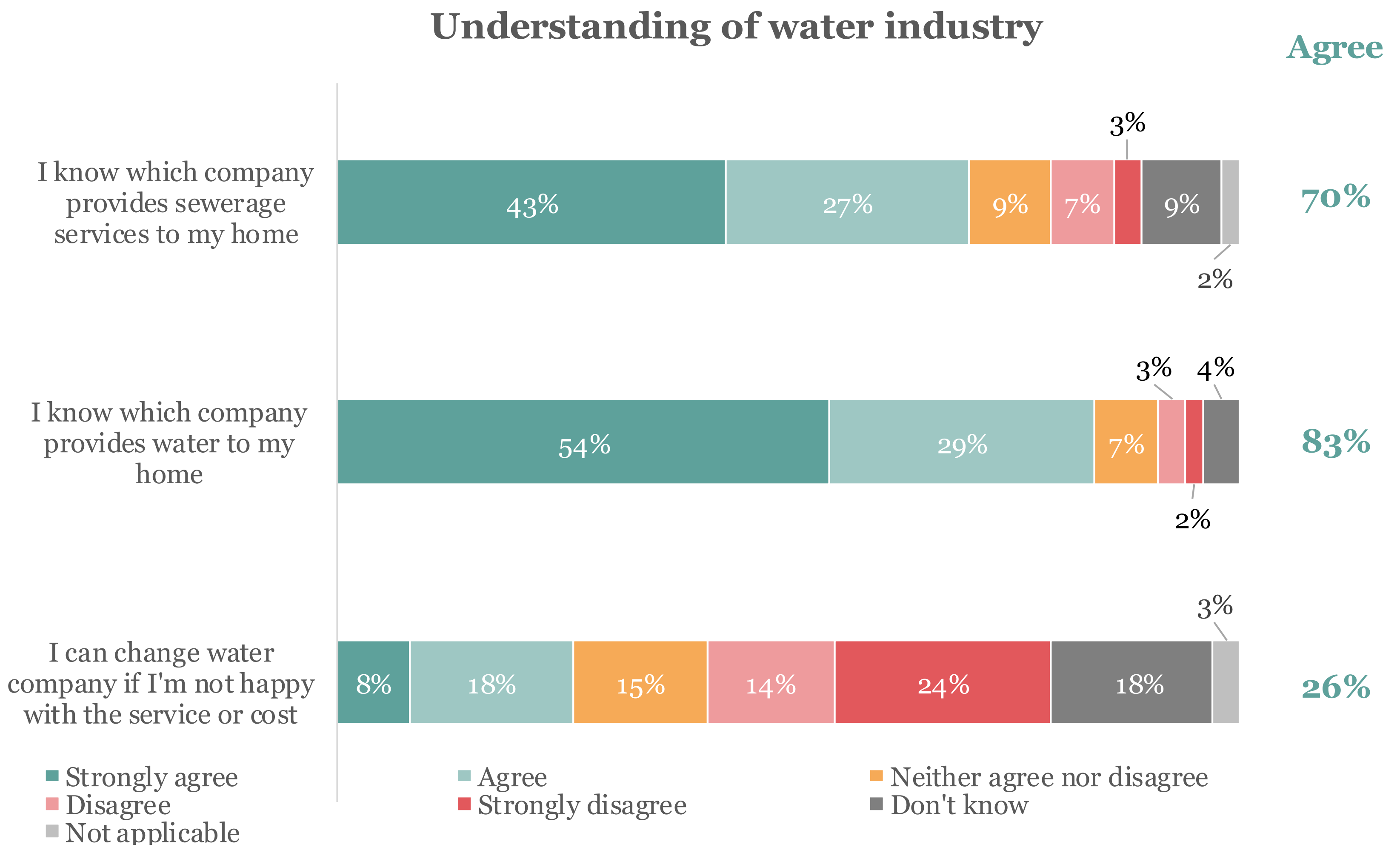
- A third of people (**34%**) struggle to pay their bills at least some of the time, and a similar proportion (**28%**) think their financial situation will worsen over the coming year.

- Just under half (**45%**) of people were aware that utility companies offer support to those who are struggling financially. However, only a third (**33%**) were aware that water companies offer such support.

- However, more bill payers who have struggled all of the time to pay bills over the last year used credit cards to pay their bills (**35%**) than accessed financial support from the water company (**20%**).

2. How well do consumers understand their water provider?

A significant majority say they know which company provides water to their home



Demographic differences

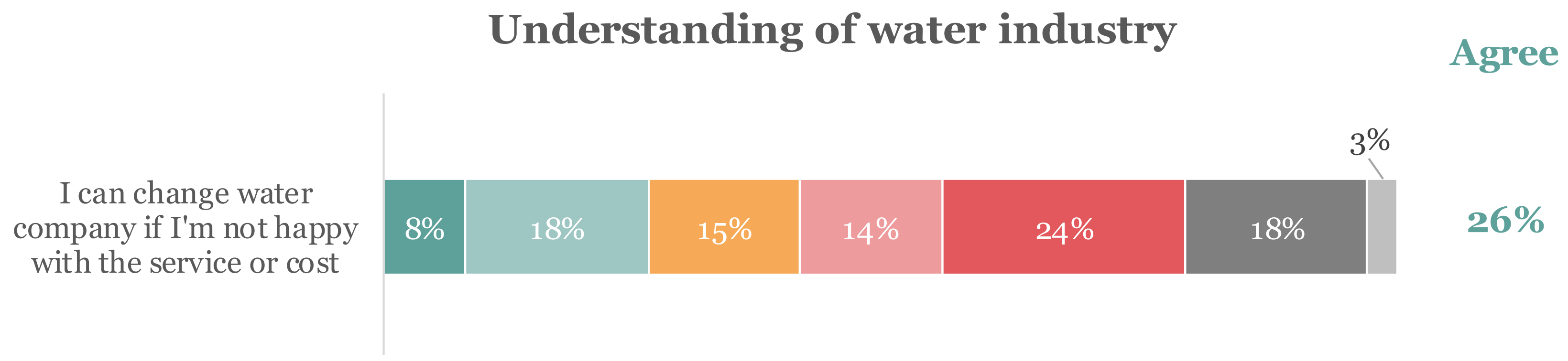
Women (**28%**) were slightly more likely to say they can change water company if not happy compared to men (**25%**). Younger age groups (18-34: **37%** and 35-54: **28%**) were significantly more likely to agree with the statement compared to those aged 55+ (**17%**).

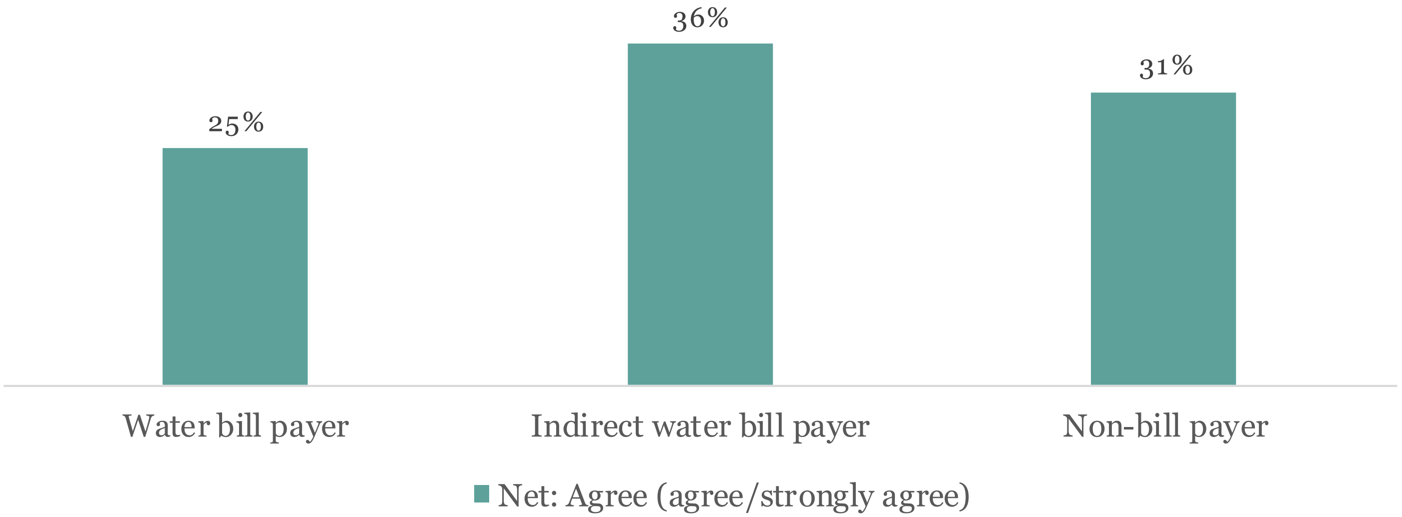
Women (**82%**) were slightly less likely to say they knew which company provides water to their home compared to men (**84%**). Older age groups (35-54: **86%** and 55+: **94%**) were significantly more likely to know their water supplier compared to those aged 18-34 (**65%**).

Men (**75%**) were significantly more likely to say they know which company provides sewerage services to their home compared to women (**66%**). Older age groups (35-54: **73%** and 55+: **89%**) were significantly more likely to know who their sewerage supplier was compared to those aged 18-34 (**42%**).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

A quarter of consumers incorrectly think they can change their water company if they're unhappy





Demographic differences

Those in the C2DE social grade were significantly more likely to agree that they can change water company if not happy with the service or cost (**28%**), compared to those in the ABC1 group (**24%**).

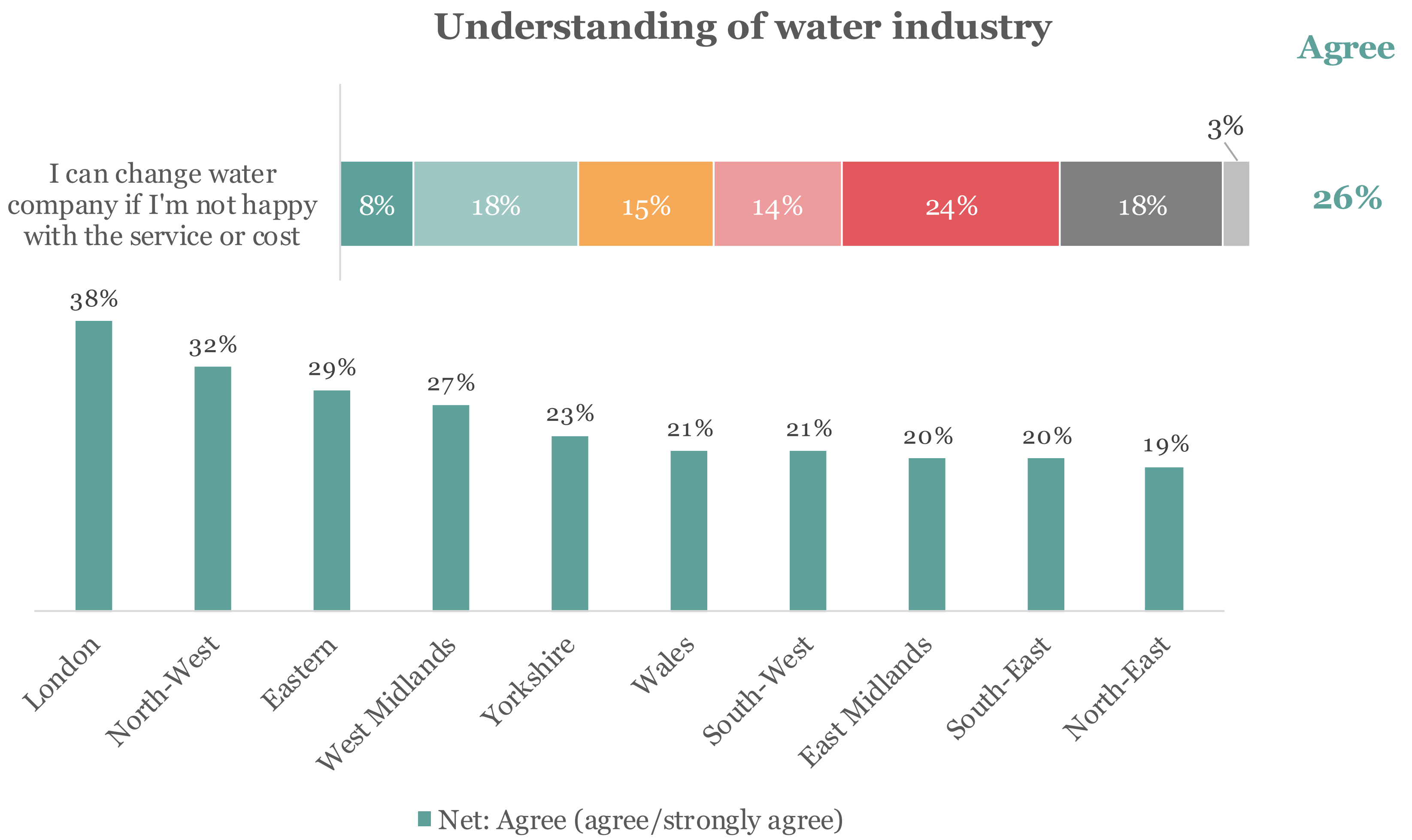
In terms of living status, those living at home with parents (**46%**) and tenants (**29%**) were significantly more likely to mistakenly agree with the statement compared to homeowners (**21%**).

Consumers living with someone who has a disability in their household (**27%**), or who themselves have a disability (**26%**), similarly responded to those with no disabilities (**26%**).

Water bill payers were significantly less likely to agree (**25%**) compared to indirect (**36%**) or non-bill payers (**31%**), suggesting they have a better understanding of how the water industry operates.

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

Around 2 in 5 in London incorrectly believe they can change their water company if dissatisfied



Demographic differences

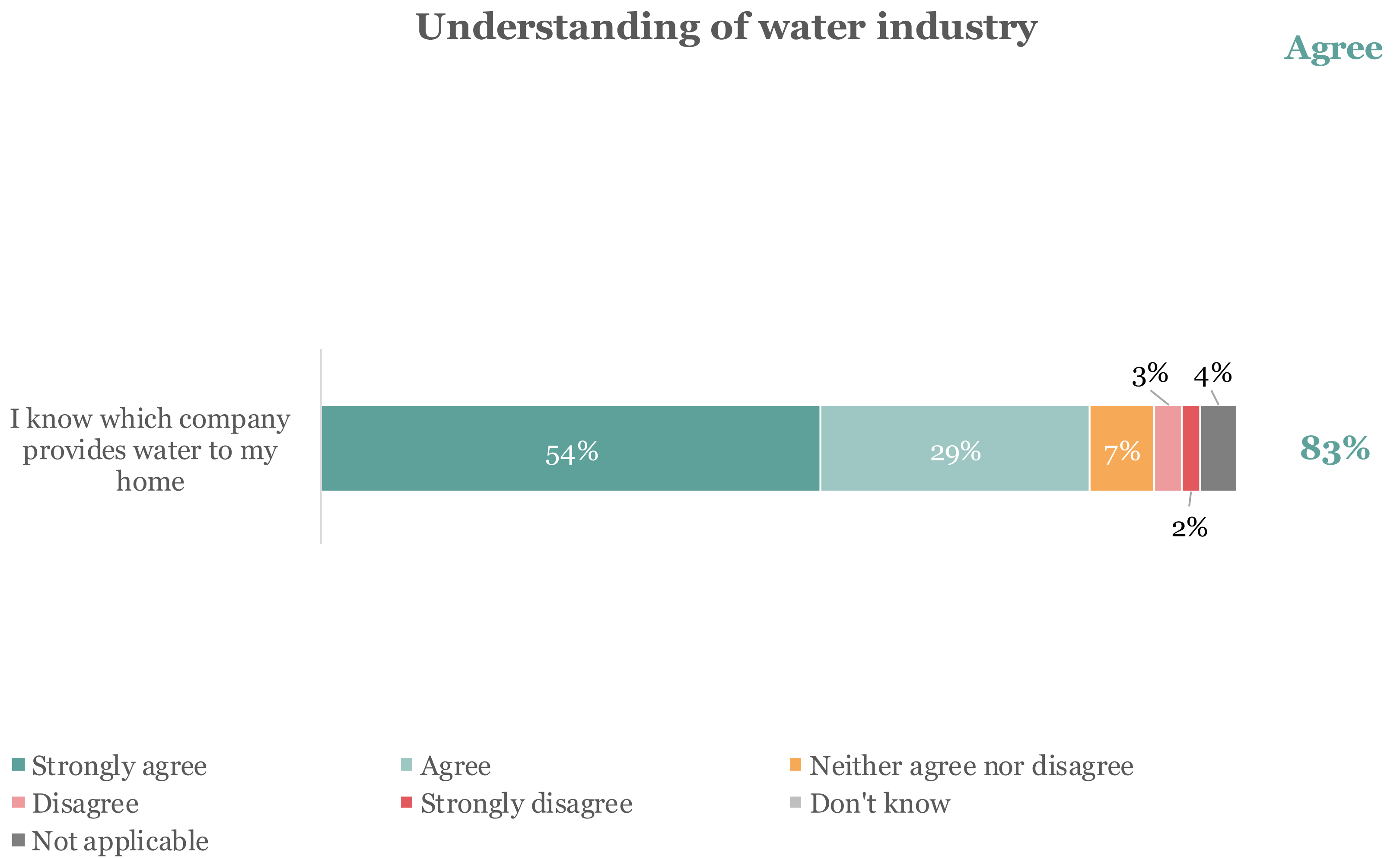
Consumers living in London* (**38%**) and the North-West (**32%**) were most likely to think they can change their water company. Followed by those living in Eastern (**29%**) and West-Midlands (**27%**). Those based in Yorkshire & Humberside (**23%**), Wales (**21%**), South-West (**21%**), East Midlands (**20%**), South-East (**20%**) and North-East (**19%**) were less likely to agree with the statement compared to the total average.

Those with a water meter (**25%**) were slightly less likely to agree with the statement compared to those without a water meter (**26%**).

Consumers living in urban (**34%**) and suburban (**24%**) areas were significantly more likely to agree compared to those living in rural areas (**20%**). Those without access to a garden (**31%**) were also more likely to agree with the statement compared to those with access to a garden (**25%**).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)
*London-based consumers are more likely to be non-bill payers (19%) than the average for England and Wales (14%)

Homeowners were the best informed when it came to knowing which company provides their water



Demographic differences

Water bill payers were significantly more likely to know which company provides water to their home (**89%**) compared to non-bill payers (**65%**) or indirect bill payers (**58%**).

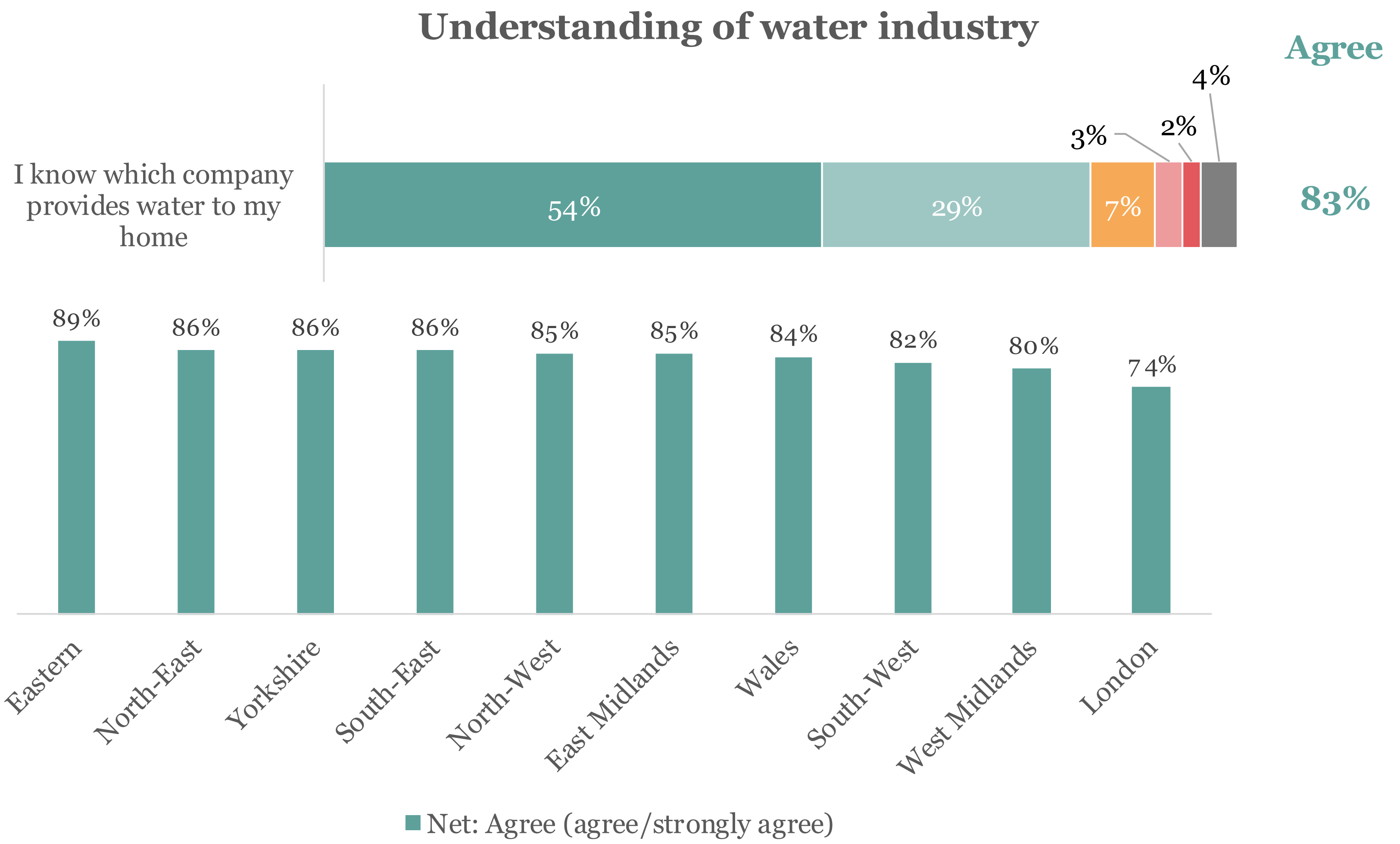
Those in the ABC1 social grade were significantly more likely to agree with the statement (**87%**), compared to those in the C2DE group (**79%**).

In terms of living status, those living at home with parents were significantly less likely to agree with the statement (**55%**) compared to tenants (**80%**) and homeowners (**91%**).

Consumers with a disability (**85%**) or who are living with someone who has a disability in their household (**82%**), similarly responded as those with no disabilities (**83%**).

 Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

Consumers living in urban areas were significantly less likely to know who their water supplier is



Demographic differences

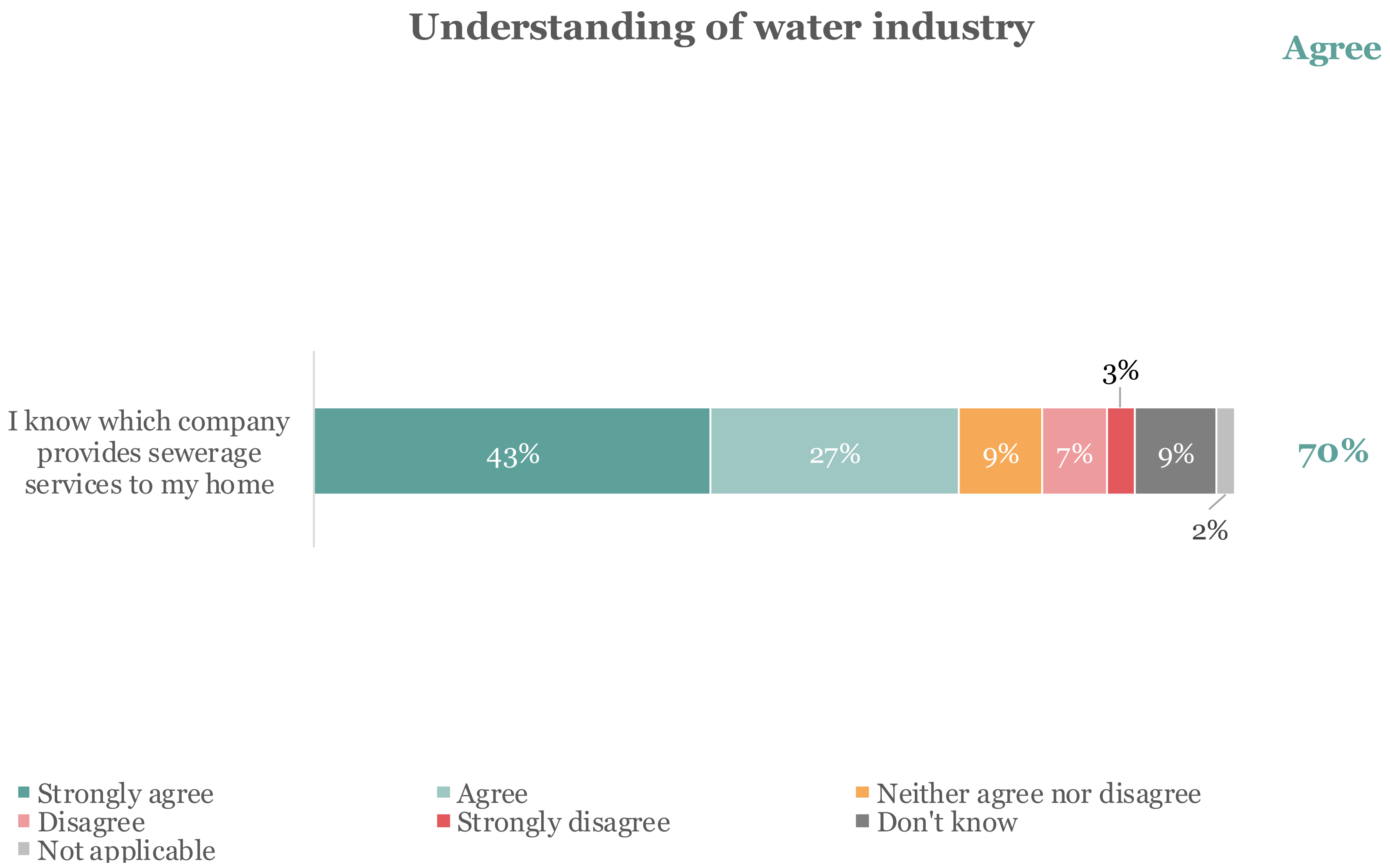
People in the following regions were more likely than average to know which company provides their water: Eastern (**89%**), North-East (**86%**), Yorkshire & Humberside (**86%**), South-East (**86%**), North-West (**85%**), East Midlands (**85%**) and Wales (**84%**). Only South-West (**82%**), West-Midlands (**80%**) and London (**74%**) were less likely to agree with the statement compared to the total average.

Those with a water meter (**91%**) were 10 percentage points more likely to know who their water supplier is, compared to those without a water meter (**81%**).

Consumers living in urban areas (**76%**) were significantly less likely to know who their water supplier is compared to those living in rural (**89%**) and suburban areas (**85%**). Those with access to a garden (**85%**) were also significantly more likely to agree with the statement compared to those without access to a garden (**75%**).

 Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

Significantly fewer consumers know who supplies sewerage services to their home compared to water overall



Demographic differences

Water bill payers (**77%**) and non-bill payers (**48%**) were significantly more likely to say they know which company provides their sewerage services compared to indirect bill payers (**36%**).

Those in the ABC1 social grade were significantly more likely to agree with the statement (**77%**), compared to those in the C2DE group (**62%**).

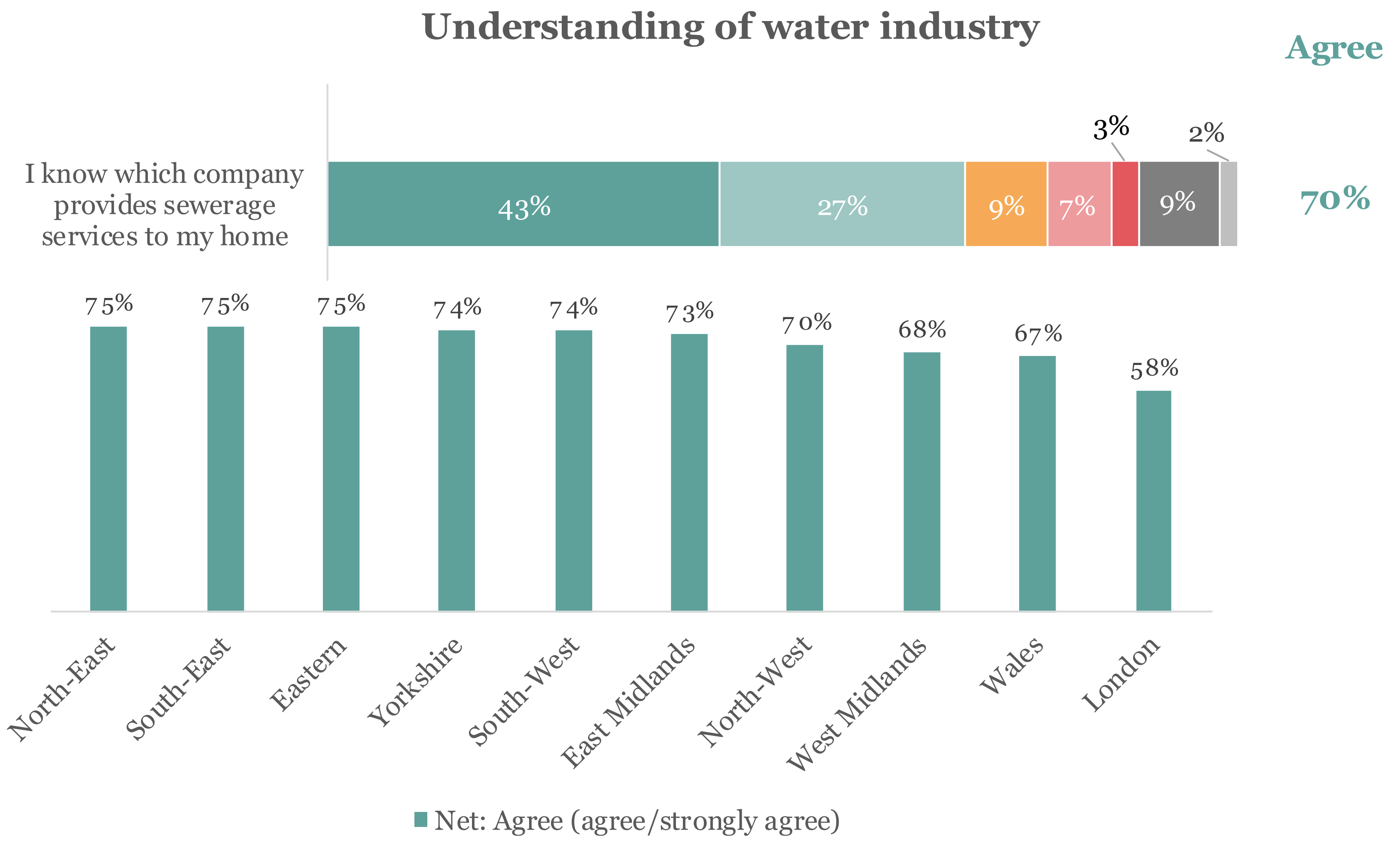
Those living at home with parents were significantly less likely to agree with the statement (**34%**) compared to tenants (**62%**) and homeowners (**83%**).

Consumers with a disability (**73%**) or who are living with someone who has a disability in their household (**67%**), similarly responded as those with no disabilities (**71%**).

Those who are satisfied with their wastewater and drainage services were significantly more likely to know who their provider is (**80%** vs. **51%**).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

London scored the lowest in terms of regional knowledge of who provides sewerage services



Demographic differences

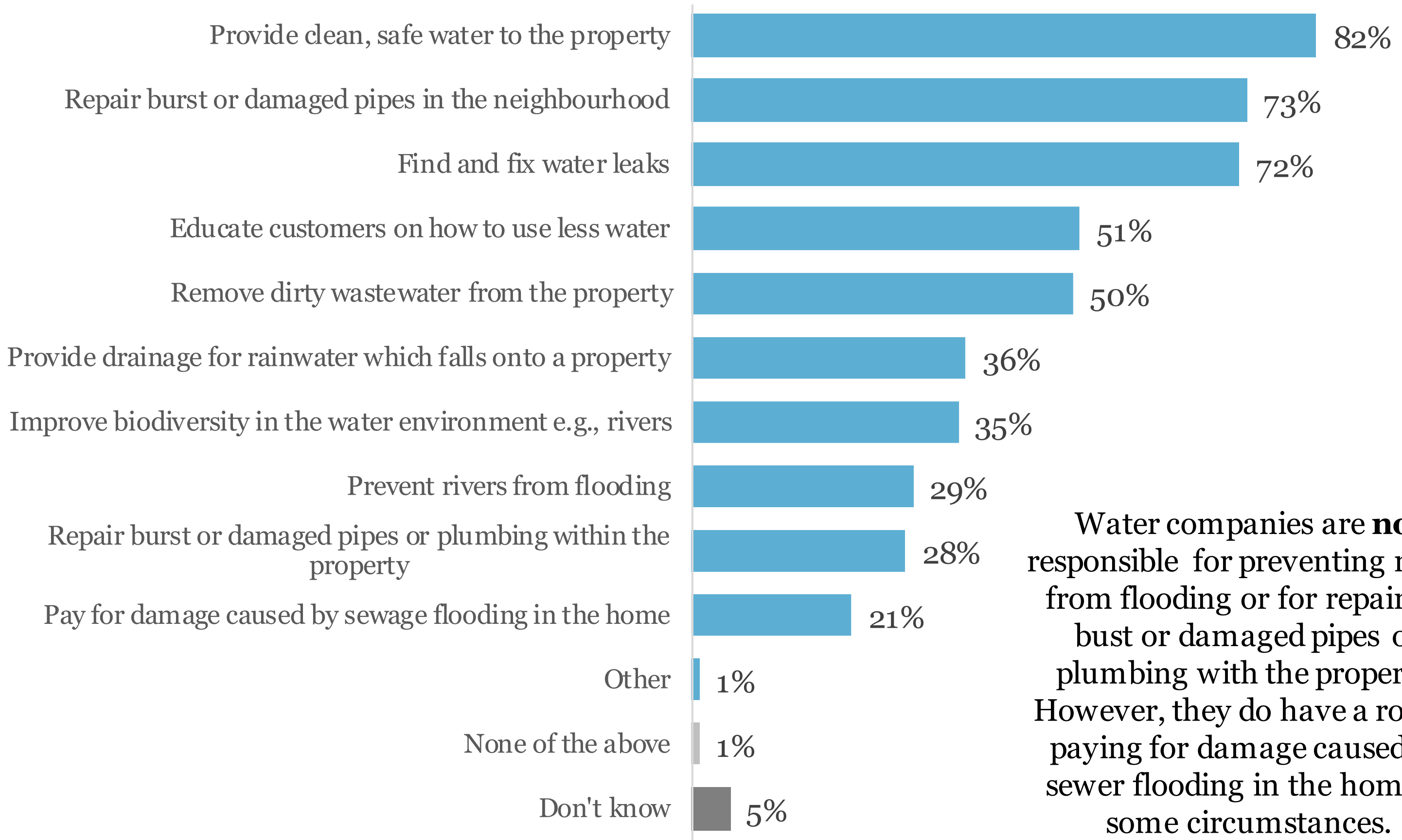
70% or more said they know which company provides sewerage services to their home in the following regions: North-East (**75%**), South-East (**75%**), Eastern (**75%**), Yorkshire & Humberside (**74%**), South-West (**74%**), East Midlands (**73%**), North-West (**70%**). Only consumers living in London (**58%**), Wales (**67%**) and the West-Midlands (**68%**) were less likely to agree with the statement compared to the total average.

Those with a water meter (**81%**) were significantly more likely to say they know who supplies their sewerage services compared to those without a water meter (**66%**). Consumers living in urban areas (**61%**) were significantly less likely to agree with the statement compared to those living in suburban (**75%**) and rural areas (**75%**). Those without access to a garden (**61%**) were also less likely to agree with the statement compared to those with access to a garden (**72%**).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,623)

Providing water, repairing pipes and fixing leaks were seen as water companies' main activities

Understanding of water companies' responsibilities



Water companies are **not** responsible for preventing rivers from flooding or for repairing bust or damaged pipes or plumbing with the property. However, they do have a role in paying for damage caused by sewer flooding in the home in some circumstances.

Over **95%** of digitally disenfranchised respondents attribute providing clean, safe water to the property and finding/fixing leaks to water companies; in contrast only over **60%** of ethnic minority respondents attribute the same activities to water companies.

Water bill payers were significantly more likely to associate the majority of the activities listed with water companies compared to non-bill payers.

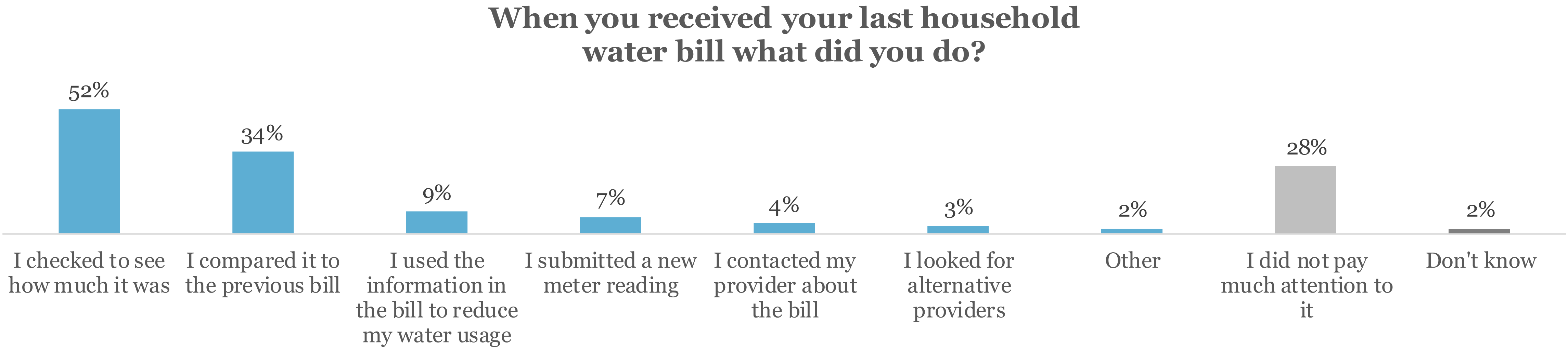
Q21. Which of the following do you think water companies do? Base: All respondents (n=2,623), Digitally disenfranchised respondents (n=100) and Ethnic minority respondents (n=600)

Key insights into consumers' understanding of their water providers

- The majority (**83%**) claim to know which company provides their water. Around a quarter (**26%**) believe, incorrectly, that they can change their water company if unsatisfied.
- A smaller majority (**70%**) were aware of which company provides their sewerage services.
- In general, water bill payers had a better understanding of who provides their water compared to indirect and non-bill payers.

3. How engaged are consumers with water companies?

Around three in ten did not pay much attention to their last household water bill



Younger age groups were more likely to say they did not pay attention to their last bill.

Those who said they did not pay much attention to their last bill tended to be younger (18-34: **31%**, 35-54: **30%**), and in the C2DE socio-economic grades (**33%**).

They were also less likely to have a water meter (**35%**) or access to a garden (**34%**) and were more likely to be tenants (**33%**).

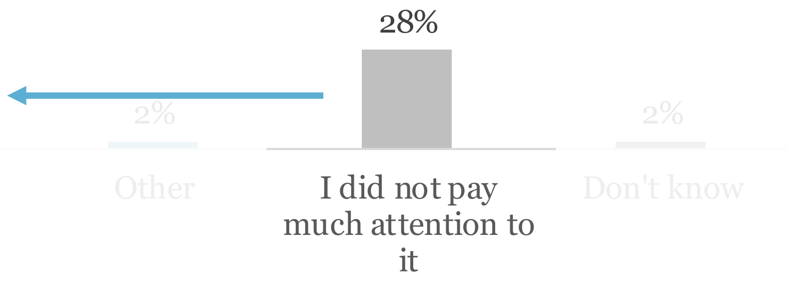
Ethnic minority respondents were slightly more likely to pay attention to the bill (**76%** vs an average of **72%**) and their most common actions were to check how much it was (**48%**) and compare it to the previous bill (**33%**).

Q25. When you received your last household water bill, which of the following did you do? Base: All water bill payers (n=2,086), Ethnic minority respondents (n=600)

A quarter of those who didn't pay attention to their last bill said it was because it was a fixed cost that doesn't change

Why did you not pay much attention to your last water bill?

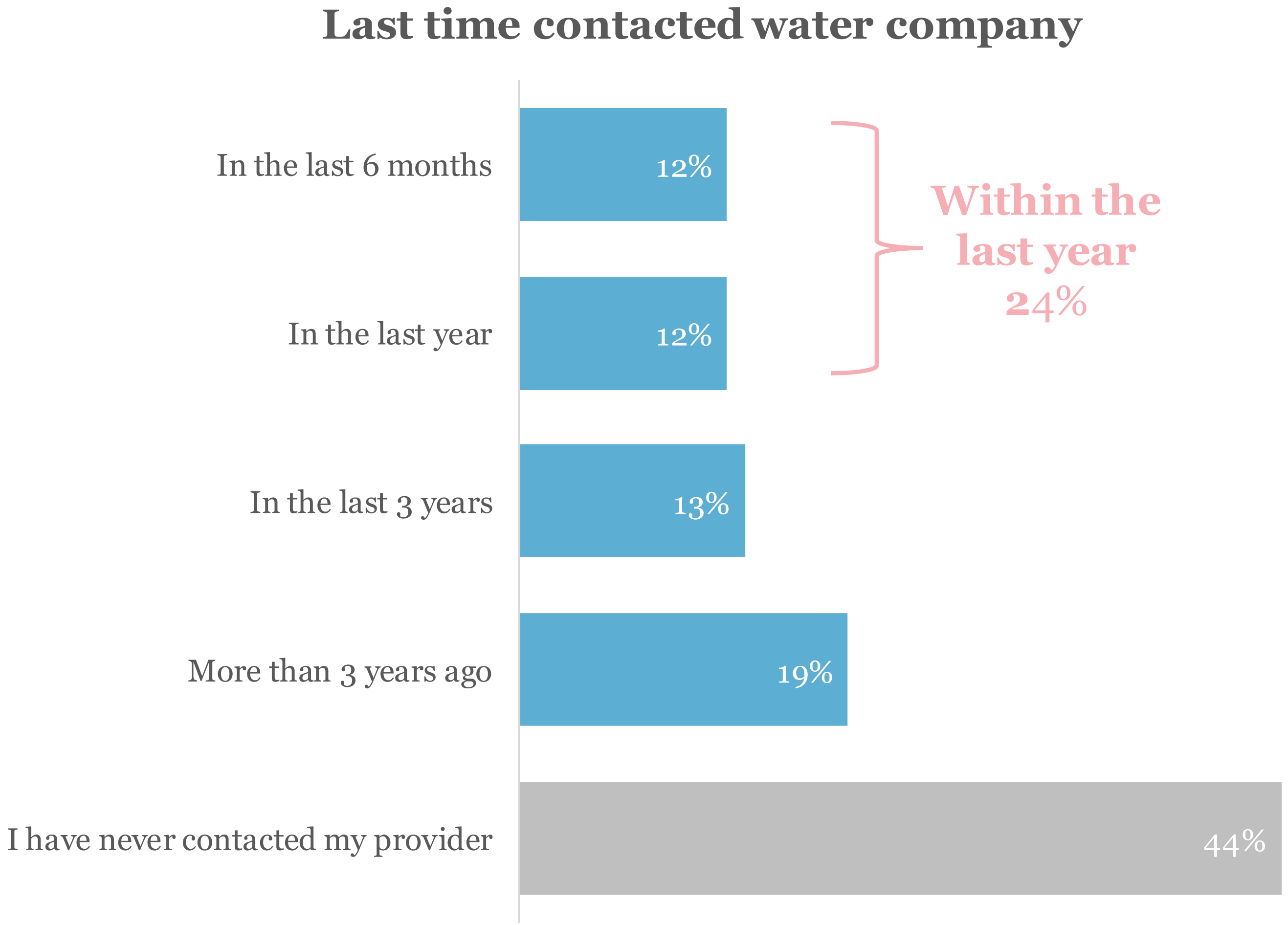
Reason	%
It's always the same / fixed cost	24%
I pay it by direct debit / standing order	11%
It has to be paid either way	11%
I just pay it	8%
Seems correct / okay	4%
Someone else pays them / don't pay them	4%
Don't need to / no point	4%



Reasons stated by less than 4% not shown in table

Q25. When you received your last household water bill, which of the following did you do? Base: All water bill payers (n=2,086)
Q26. Why did you not pay much attention to your last water bill? (Coded) Base: Respondents who didn't pay much attention to last household water bill (n=581)

Those struggling financially were more likely to have been in touch with their provider during the last year



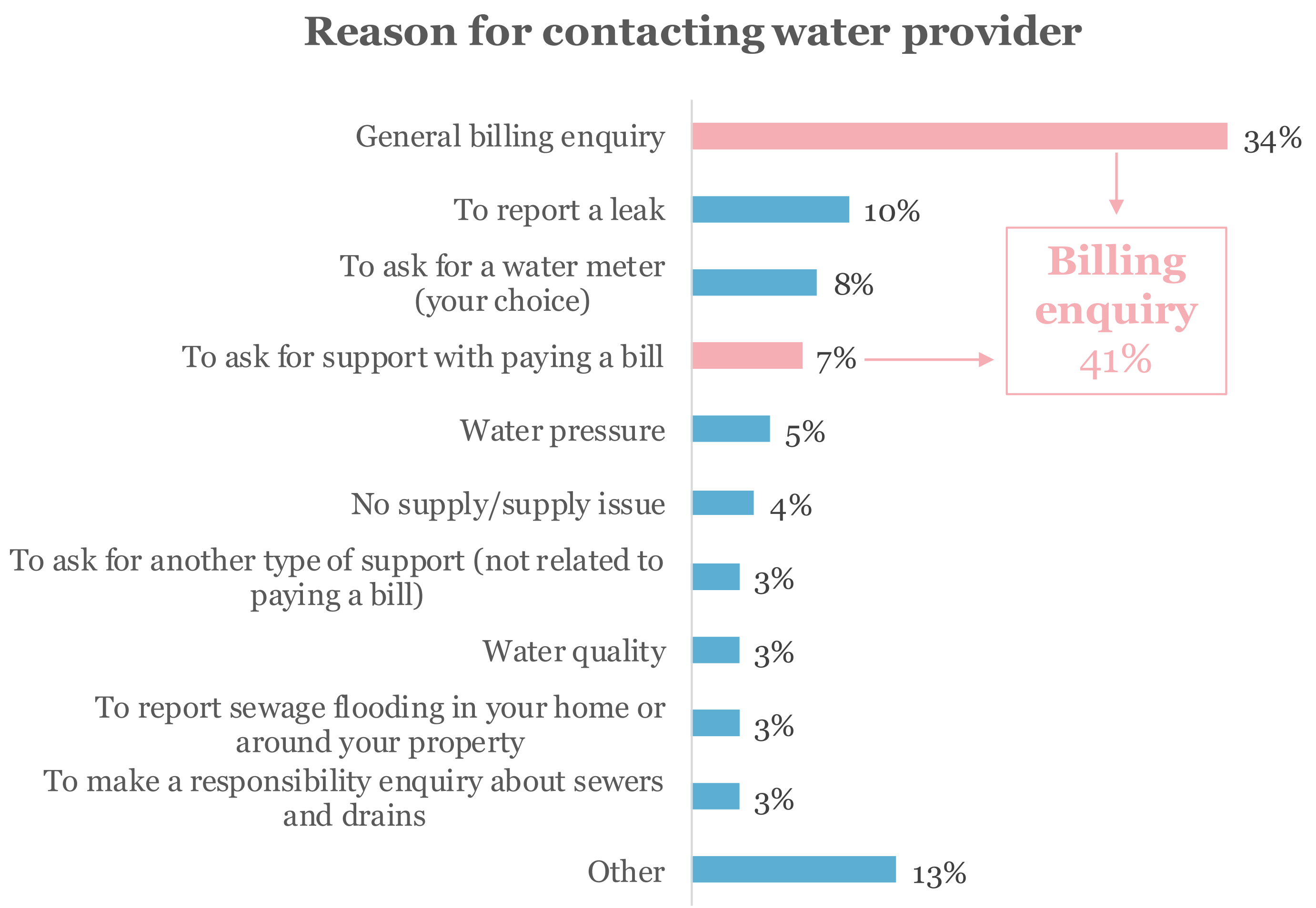
Younger age groups were significantly more likely to have contacted their water provider within the last year (18-34: **31%**, 35-54: **25%**). As were those in the C2DE social group (**27%**), those who have struggled to pay their bills 'all of the time' over the last year (**47%**) and those who have borrowed money to pay bills over the last 12 months (**33%**).

The ethnic minority respondents were the most likely audience to have contacted their water provider within the last year (**34%**) compared to those who are digitally disenfranchised (**20%**), or those based in Wales (**26%**) or England (**24%**).

Those with a water meter were significantly more likely to contact their water provider (**28%**) compared to those without a water meter (**20%**).

Q27 . When was the last time you contacted your water company? Base: All respondents (n=2,623), Ethnic minority respondents (n =600) and Digitally disenfranchised respondents (n=100)

Those who struggled to pay their bills most often over the last year were more likely to contact their water company with a billing enquiry



Younger consumers were more likely to have been in touch regarding a billing request (18-54: **48%**), as were those in the C2DE social group (**48%**), those who have struggled to pay their bills over the last year most of the time (**63%**) and those who have borrowed money to pay bills over the last 12 months (**47%**).

Ethnic minority respondents (**47%**) were most likely to have contacted their water provider with a billing-related request, compared to those who are digitally disenfranchised (**35%**), or those based in Wales (**41%**) or England (**41%**).

Options selected by less than 3% not shown in the graph

Q28. Why did you contact your provider? Base: Respondents who have contacted their provider before (n=1,488), Ethnic minority respondents (n=600) and Digitally disenfranchised respondents (n=100)

Savanta:

A quarter recall receiving direct mail and a fifth recall receiving an email from their water provider

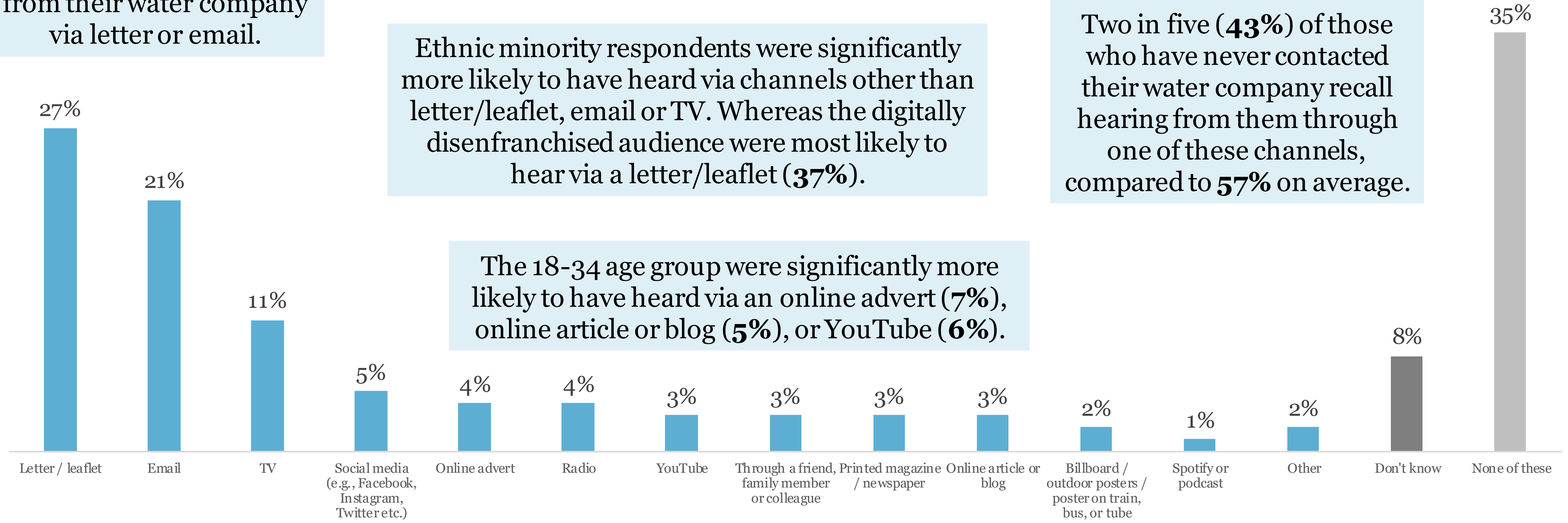
Channels through which respondents have seen or heard from their water company in the last year

Water bill payers were more likely to have heard from their water company via letter or email.

Ethnic minority respondents were significantly more likely to have heard via channels other than letter/leaflet, email or TV. Whereas the digitally disenfranchised audience were most likely to hear via a letter/leaflet (**37%**).

Two in five (**43%**) of those who have never contacted their water company recall hearing from them through one of these channels, compared to **57%** on average.

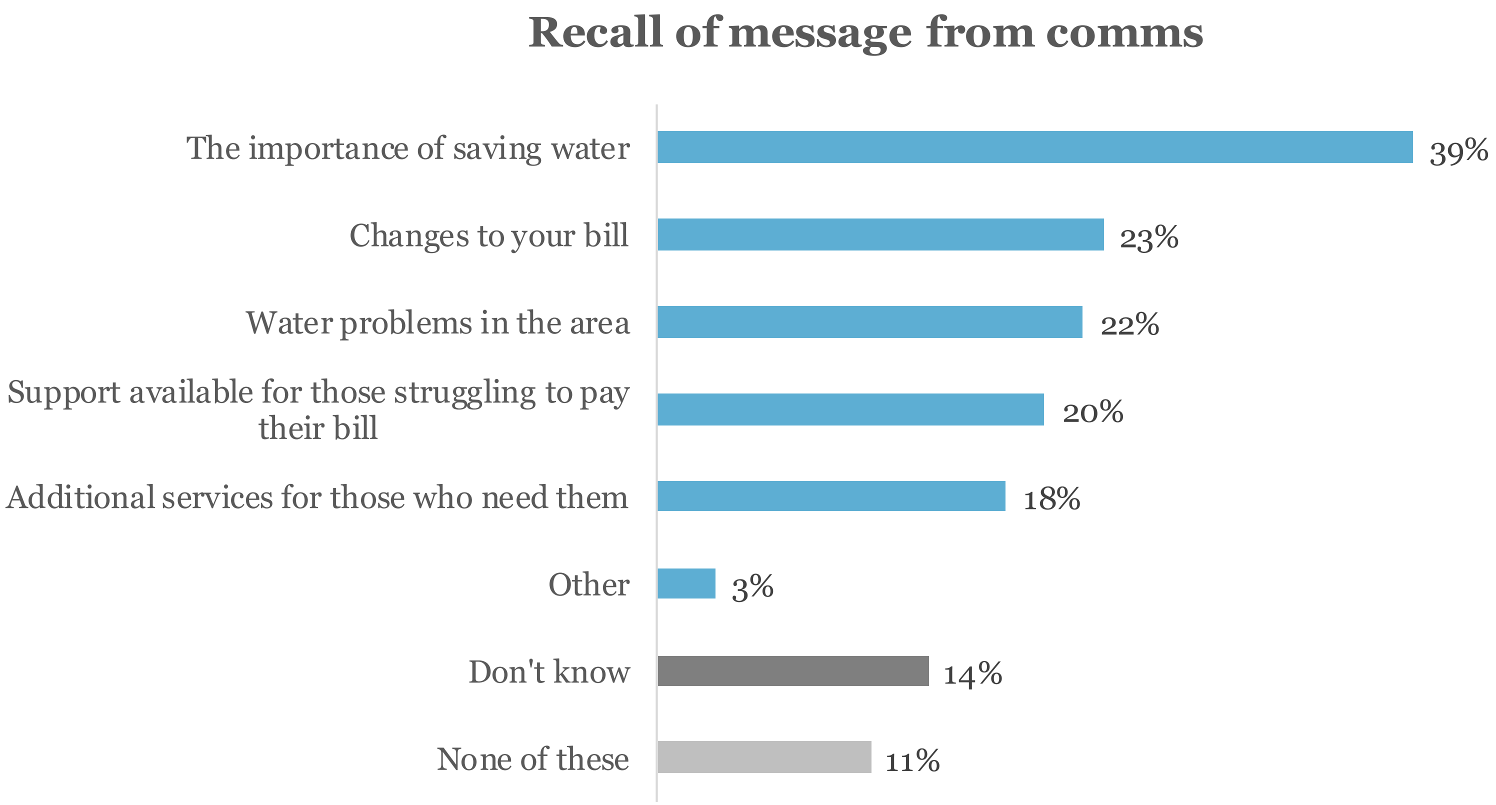
The 18-34 age group were significantly more likely to have heard via an online advert (**7%**), online article or blog (**5%**), or YouTube (**6%**).



Q31. Through which of the following have you seen or heard from your water company in the last 12 months? Base: All respondents (n=2,623), Digitally disenfranchised respondents (n=99), Ethnic minority respondents (n=600)

Savanta:

The importance of saving water was the best remembered subject of communications



Water bill payers (**42%**), men (**42%**) and those aged 55+ (**44%**), and those in the ABC1 social group (**44%**) were significantly more likely to have heard from their water provider regarding the importance of saving water.

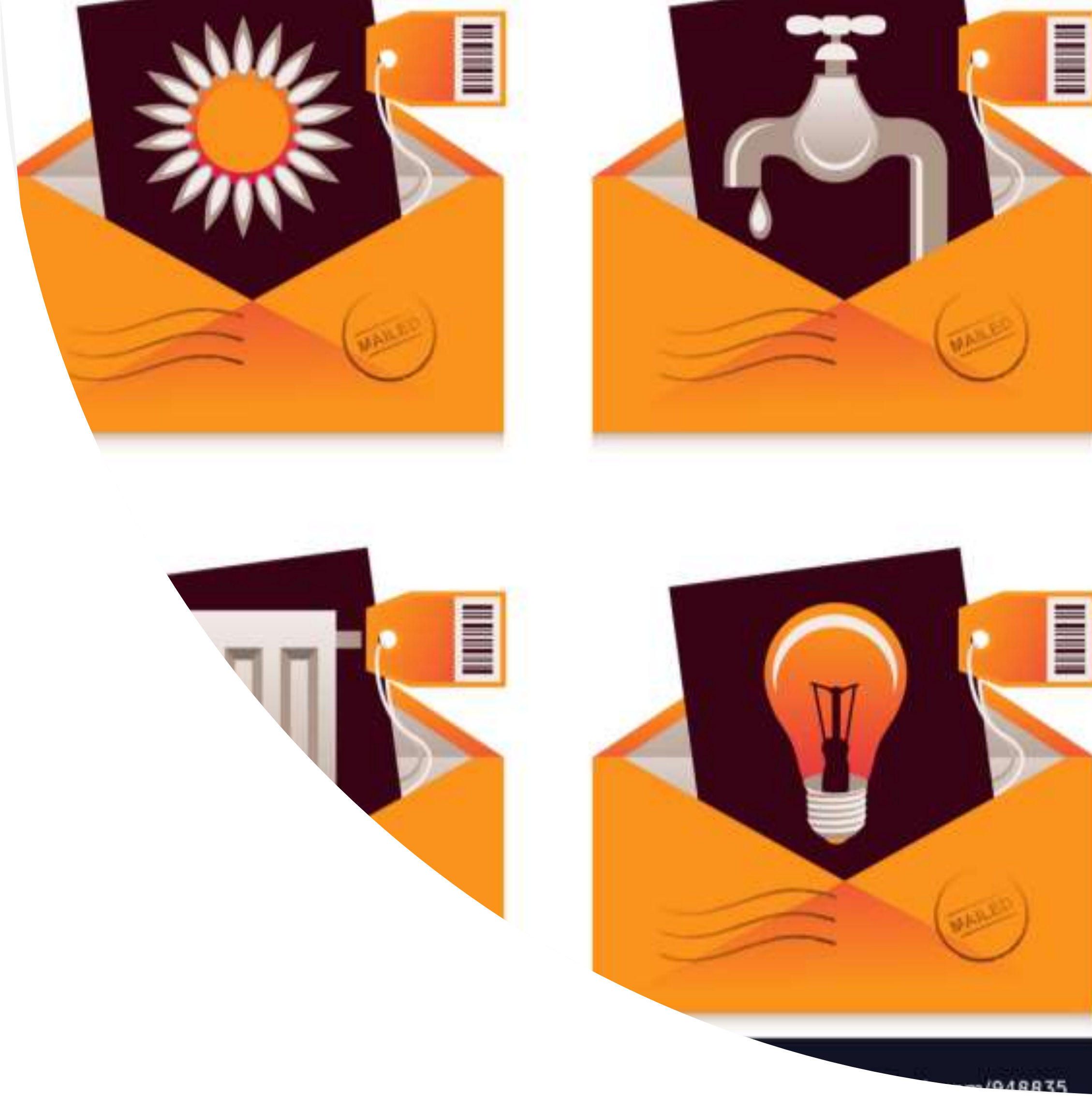
Almost two thirds (**63%**) of digitally disenfranchised respondents remember a communication regarding the importance of saving water from their water company compared to **45%** of ethnic minority respondents.

Those with a water meter were significantly more likely to recall the importance of saving water being a message (**43%**), compared to those without a meter (**36%**).

Q32. Can you recall any mention of the following in the communication you saw or heard? Base: Respondents who have seen or heard from their water company in last 12 months (n=1,484), Digitally disenfranchised respondents (n=62), Ethnic minority respondents (n=350)

Key insight into consumer engagement with water companies

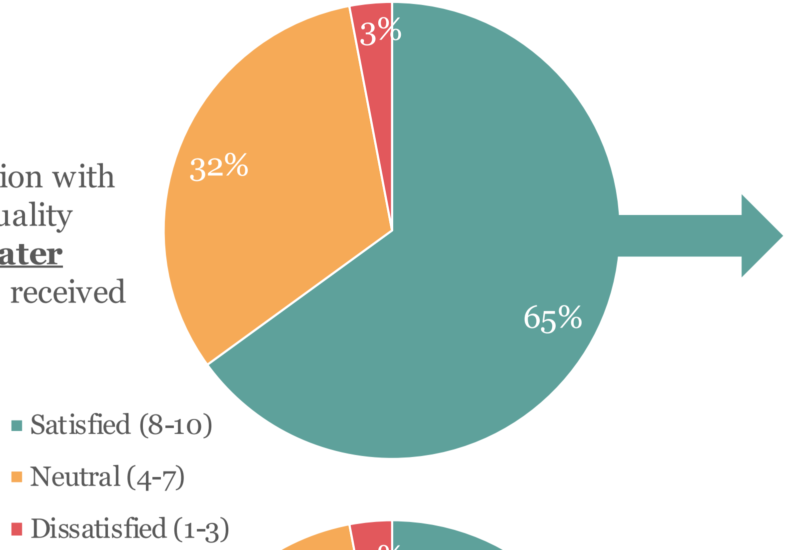
- Three in ten (**28%**) bill payers did not pay much attention to their last water bill. Younger people and people in the less affluent socio-economic grades tend to pay less attention to their bill.
- A quarter (**24%**) have contacted their water provider in the last year, with the most common reason being billing enquiries.
- A similar proportion recall receiving direct mail (**27%**) while slightly fewer recall email correspondence (**21%**).
- The importance of saving water was the best remembered message (**39%**), metered customers were more likely to recall this (**43%**) compared to unmetered customers (**36%**).

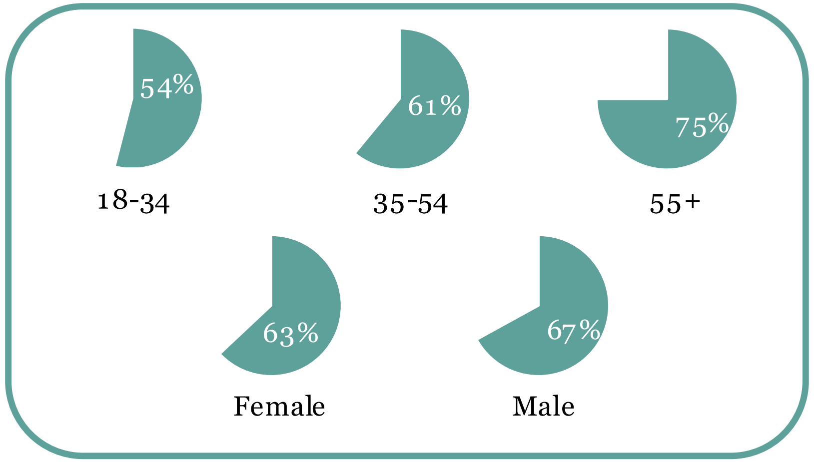


4. How satisfied are consumers with their water providers and the services they receive?

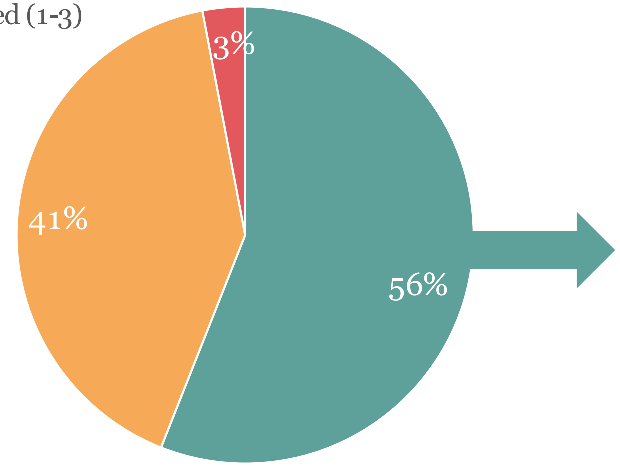
Satisfaction with both water and wastewater / drainage services increases with age

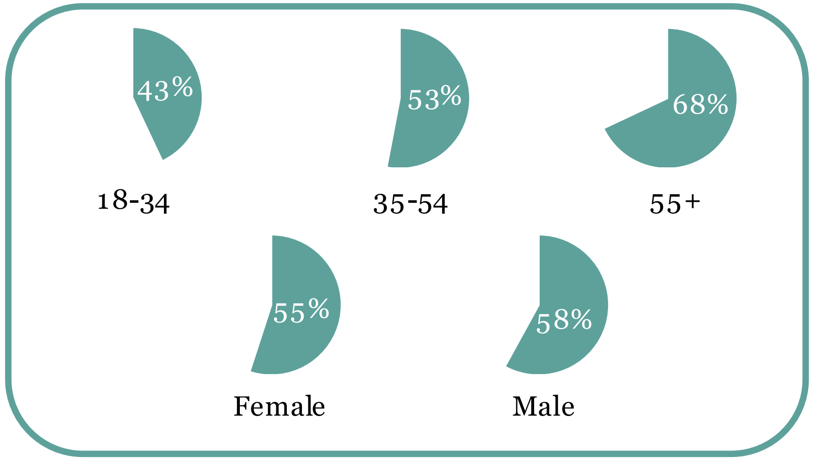
Satisfaction with the quality of **water services** received





Satisfaction with the quality of the **wastewater and drainage services** received





Due to rounding, answer options may not add up to a sum equal of the individual statements

Demographic differences

Around two thirds of women (**63%**) and men (**67%**) were satisfied with the quality of water services they received.

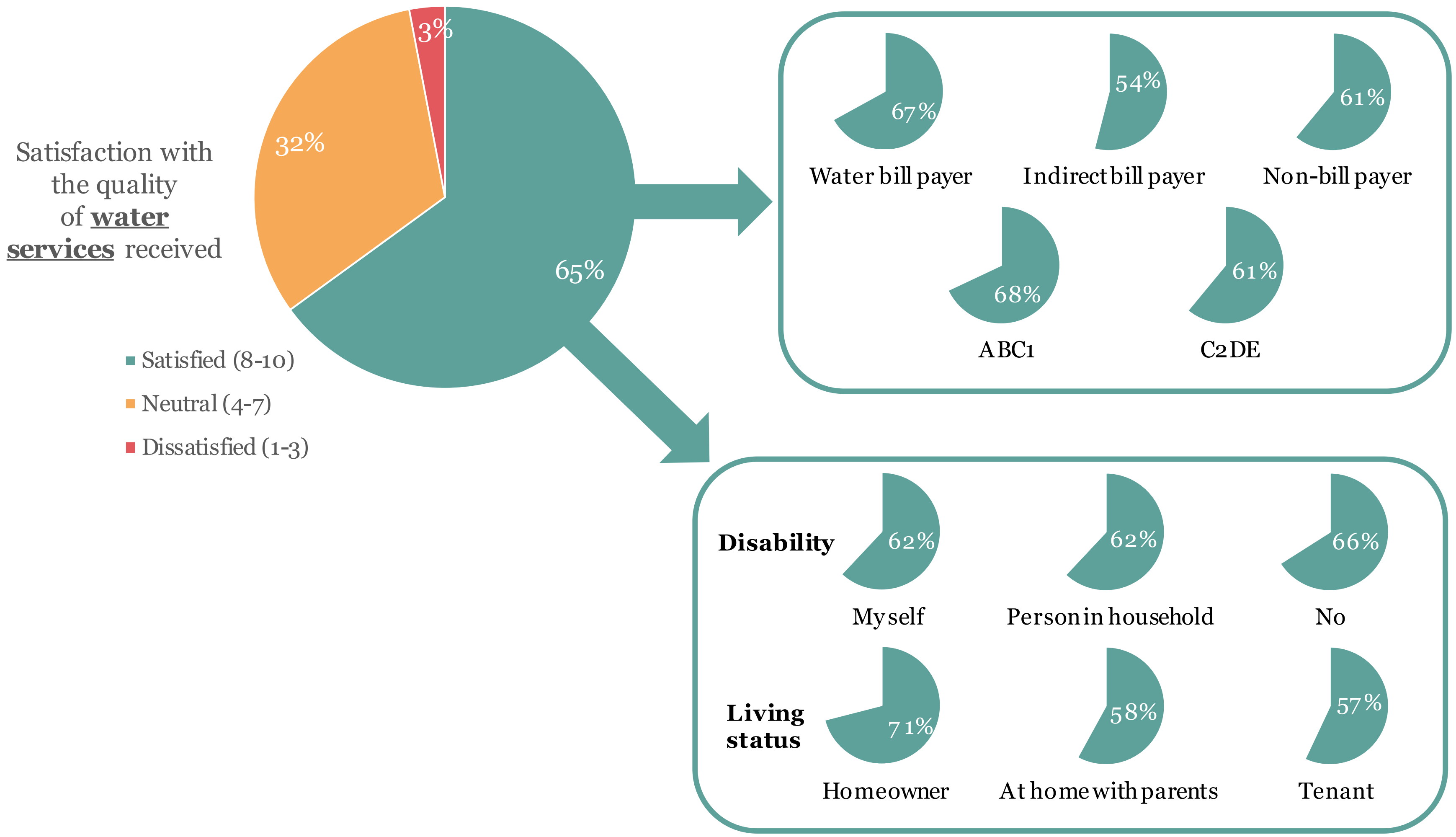
For wastewater and drainage services, just over half of both women (**55%**) and men (**58%**) were similarly satisfied with the services they receive.

In terms of age, the older the age group, the greater the satisfaction with each service. For water services those aged 55+ (**75%**) were significantly more satisfied compared to both younger age groups, and those aged 35-54 (**61%**) were significantly more satisfied compared to those aged 18-34 (**54%**).

The same is true for wastewater and drainage services with those aged 55+ (**68%**) being significantly more satisfied compared to both younger age groups, and those aged 35-54 (**53%**) being significantly more satisfied compared to those aged 18-34 (**43%**).

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623)

Bill payers were more satisfied than non-bill payers with the quality of water services



Due to rounding, answer options may not add up to a sum equal of the individual statements

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623)

Demographic differences

Water bill payers (**67%**) were significantly more satisfied with the quality of water services they receive compared to indirect (**54%**) and non-bill payers (**61%**).

The ABC1 (**68%**) social group were also significantly more satisfied compared to the C2DE (**61%**) group.

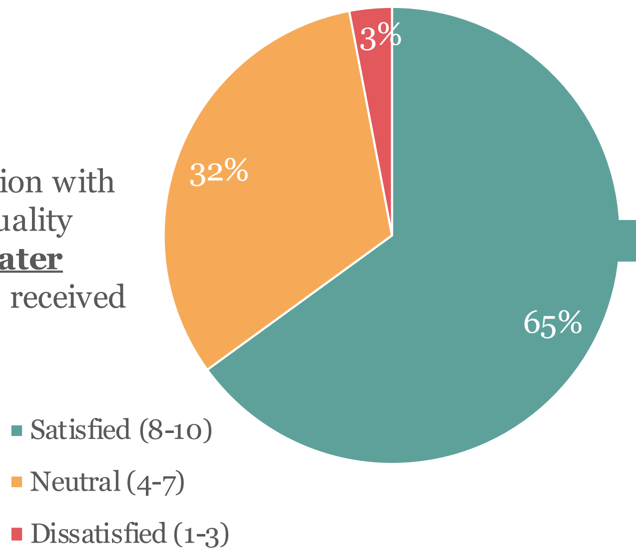
There were no significant differences in terms of water quality satisfaction when it came to disability.

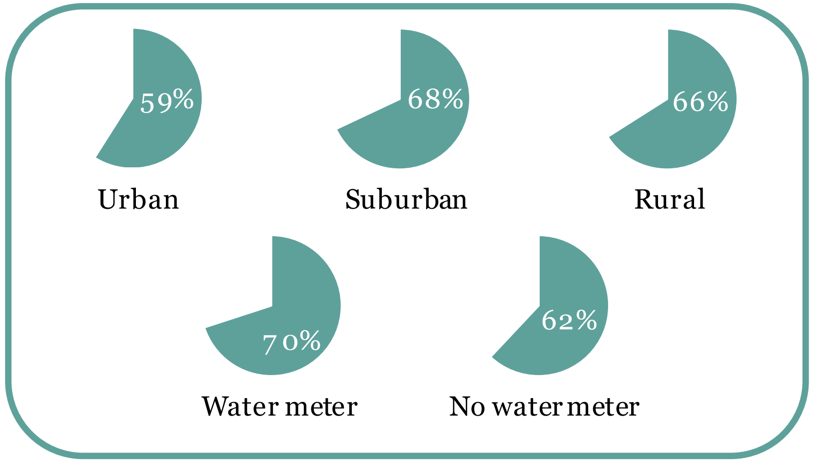
Homeowners (**71%**) were significantly more satisfied with the quality of their water services compared to those living at home with parents (**58%**) or tenants (**57%**).

Savanta:

Those living in urban areas were much less satisfied with the quality of water services

Satisfaction with the quality of **water services** received





Due to rounding, answer options may not add up to a sum equal of the individual statements

Demographic differences

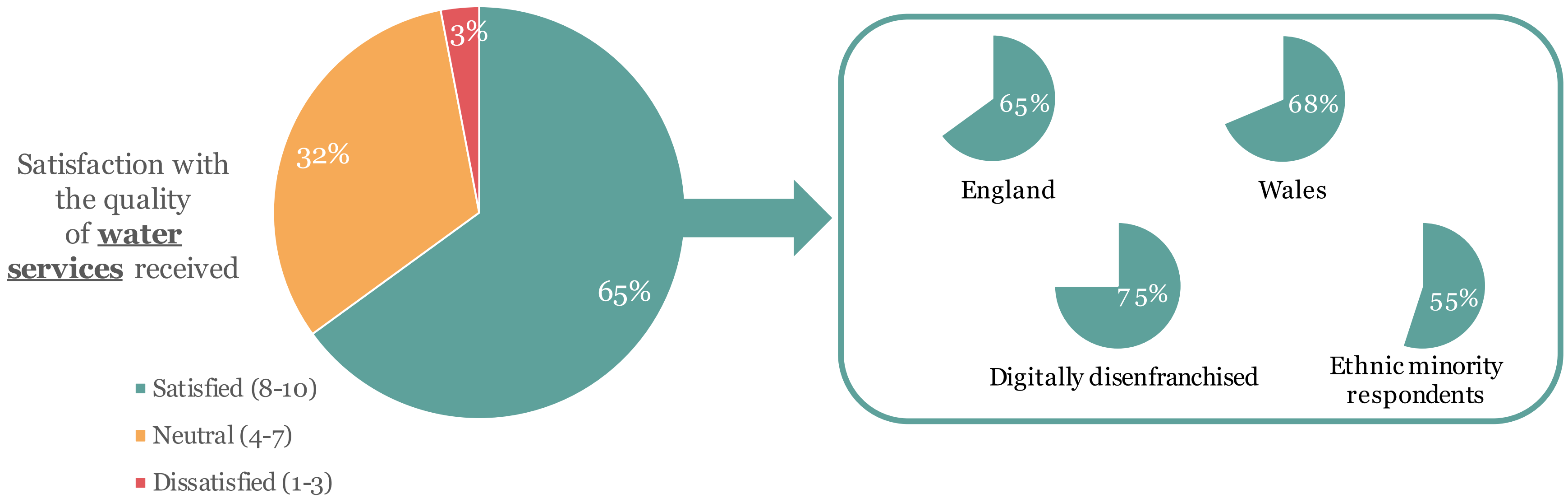
Those living in urban areas (**59%**) were significantly less likely to be satisfied with the quality of water services received compared to those living in suburban (**68%**) and rural areas (**66%**). Those with access to a garden (**67%**) were significantly more satisfied compared to those who do not have access to a garden (**53%**).

Those with a water meter (**70%**) were significantly more satisfied than those without (**62%**).

London (**57%**) and the South-East (**56%**) were less satisfied with the quality of water services compared to the overall average. For the other regions however, at least two thirds were satisfied with northern regions being the most satisfied (North-West: **74%**, Yorkshire and Humberside: **71%**, North-East: **69%**, Wales: **69%**, South-West: **66%**, Eastern: **66%**, West-Midlands: **65%**, East-Midlands: **65%**).

 Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623)

Three quarters of digitally disenfranchised consumers were satisfied with their water services



Other audiences

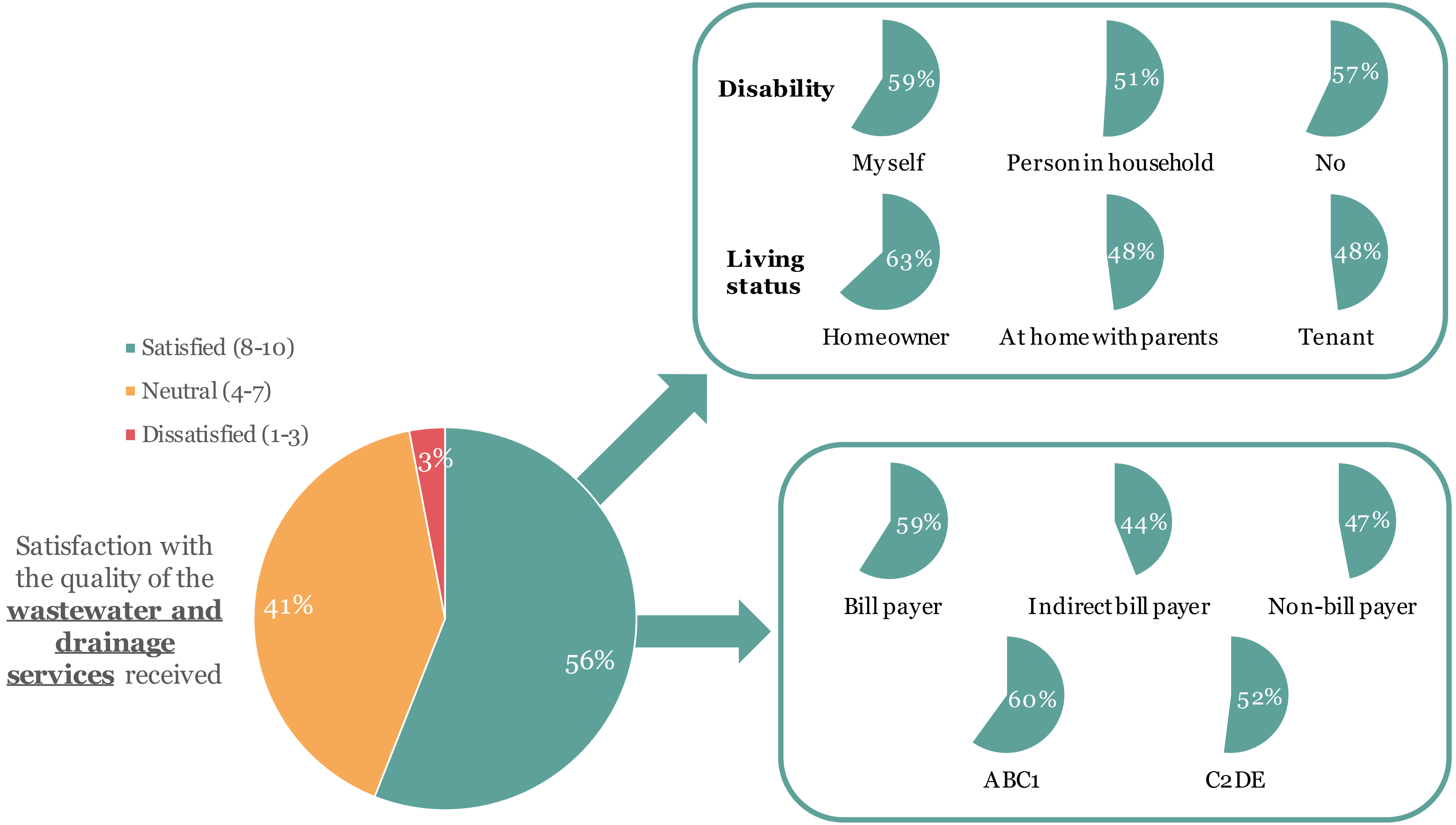
In England **65%** of consumers were satisfied with the quality of water services they received, 3 percentage points less than those in Wales (**68%**).

Three quarters of the digitally disenfranchised audience were satisfied with the quality of their water services however, in contrast just over half of ethnic minority respondents were satisfied (**55%**).

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623), Respondents based in England (n=2,116), Respondents based in Wales (n=507), Digitally disenfranchised respondents (n=100) and Ethnic minority respondents (n=600)

Bill payers had higher satisfaction with the quality of wastewater and drainage services they receive than indirect or non-bill payers



Demographic differences

Water bill payers (**59%**) were significantly more satisfied with the quality of wastewater and drainage services they receive compared to indirect (**44%**) and non-bill payers (**47%**).

The ABC1 (**60%**) social group were also significantly more satisfied compared to the C2DE (**52%**) group.

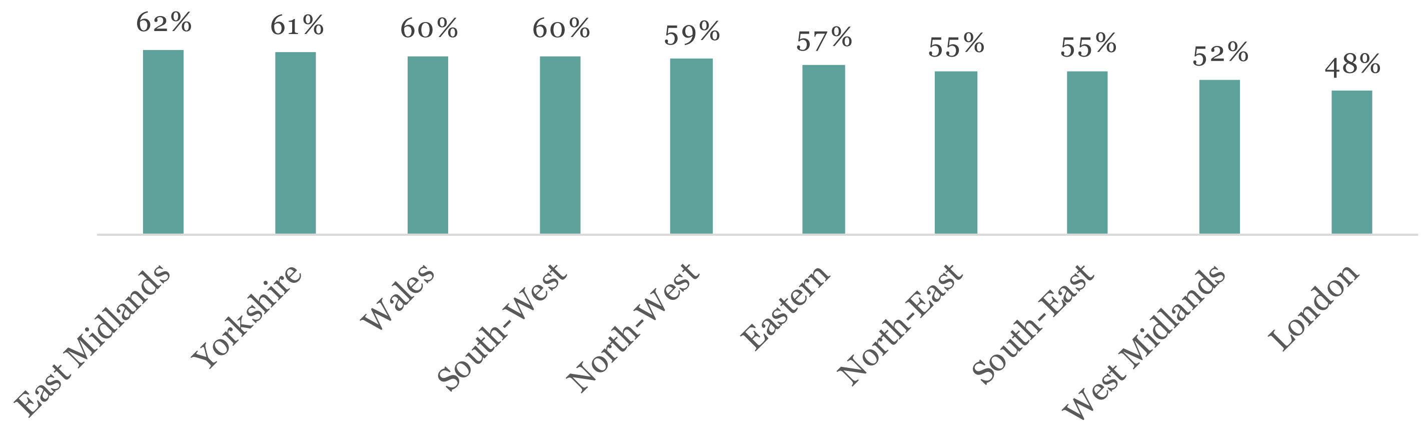
Those with a disability (**59%**) were significantly more likely to be satisfied with the quality of their wastewater and drainage service compared to those who have another person in their household who has a disability (**51%**).

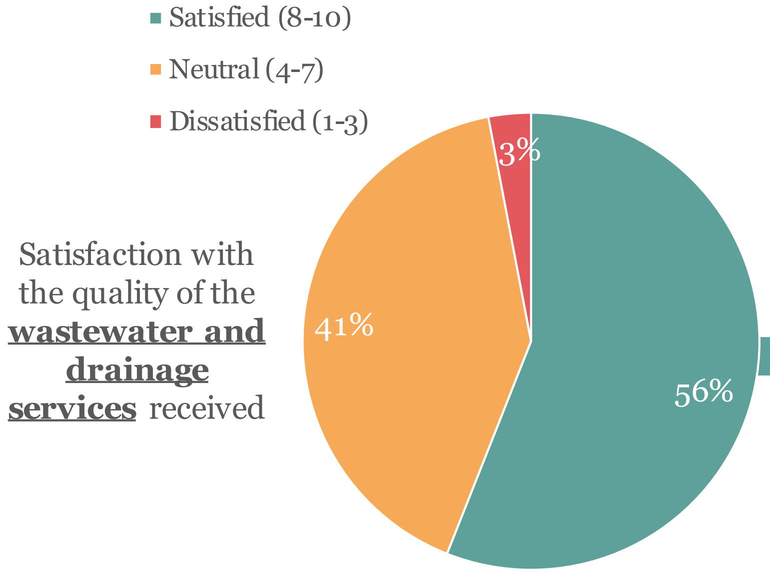
Homeowners (**63%**) were significantly more satisfied with the quality of their wastewater services compared to those living at home with parents (**48%**) or tenants (**48%**).

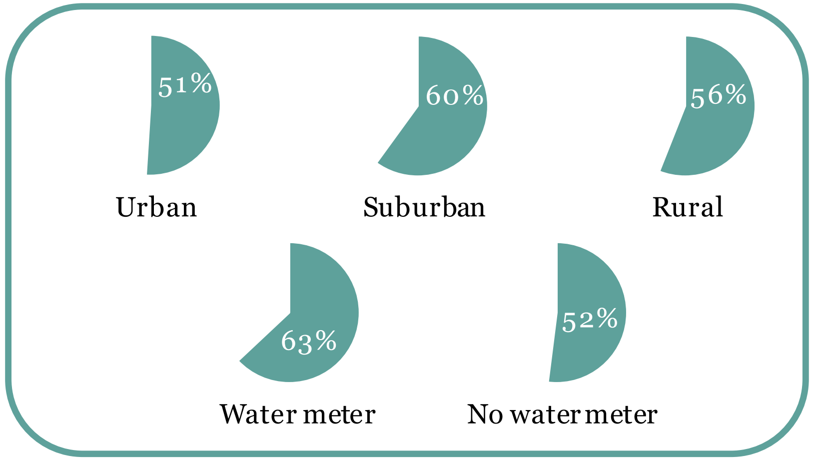
Due to rounding, answer options may not add up to a sum equal of the individual statements

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623)

Urban regions again had the lowest satisfaction







Due to rounding, answer options may not add up to a sum equal of the individual statements

Demographic differences

Those living in urban areas (**51%**) were significantly less likely to be satisfied with the quality of wastewater services received compared to those living in suburban (**60%**) and rural areas (**56%**).

Those with access to a garden (**58%**) were significantly more satisfied compared to those who do not (**45%**).

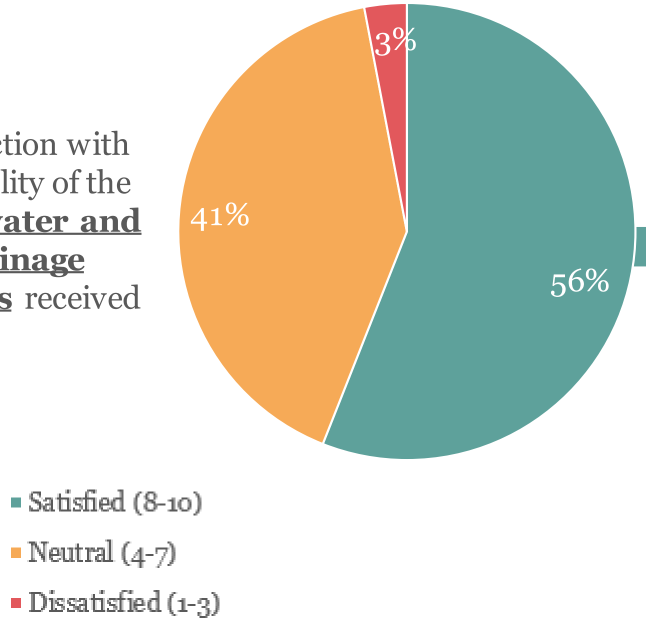
Those with a water meter (**63%**) were significantly more satisfied than those without (**52%**).

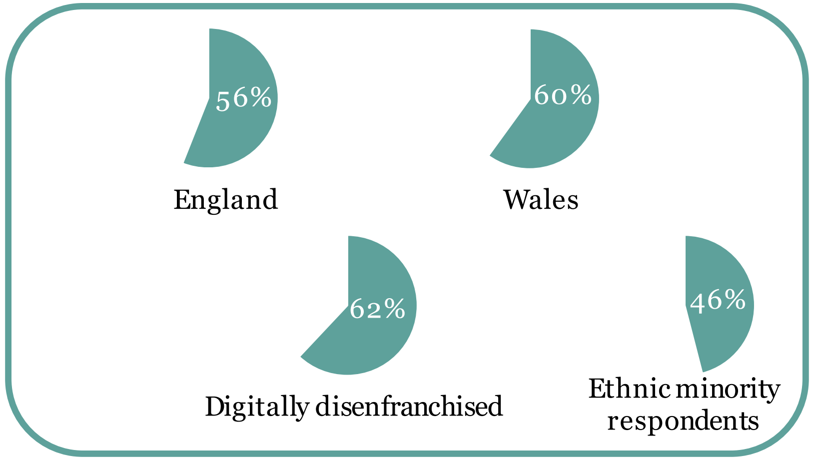
London (**48%**) again had the lowest satisfaction with the quality of wastewater and drainage services, followed by West Midlands (**52%**), South-East (**55%**) and North-East (**55%**). East-Midlands (**62%**) and Yorkshire & Humberside (**61%**) had the highest satisfaction followed by Wales (**60%**), South-West (**60%**), North-West (**59%**) and Eastern (**57%**).

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623)

Less than half of ethnic minority respondents were satisfied with the quality of wastewater and drainage services they receive

Satisfaction with the quality of the **wastewater and drainage services** received





Other audiences

In England **56%** of consumers were satisfied with the quality of wastewater and drainage services they received, 4 percentage points less than those in Wales (**60%**).

Two thirds (**62%**) of the digitally disenfranchised audience were satisfied with the quality of their wastewater services however, in contrast just under half of ethnic minority respondents were satisfied (**46%**).

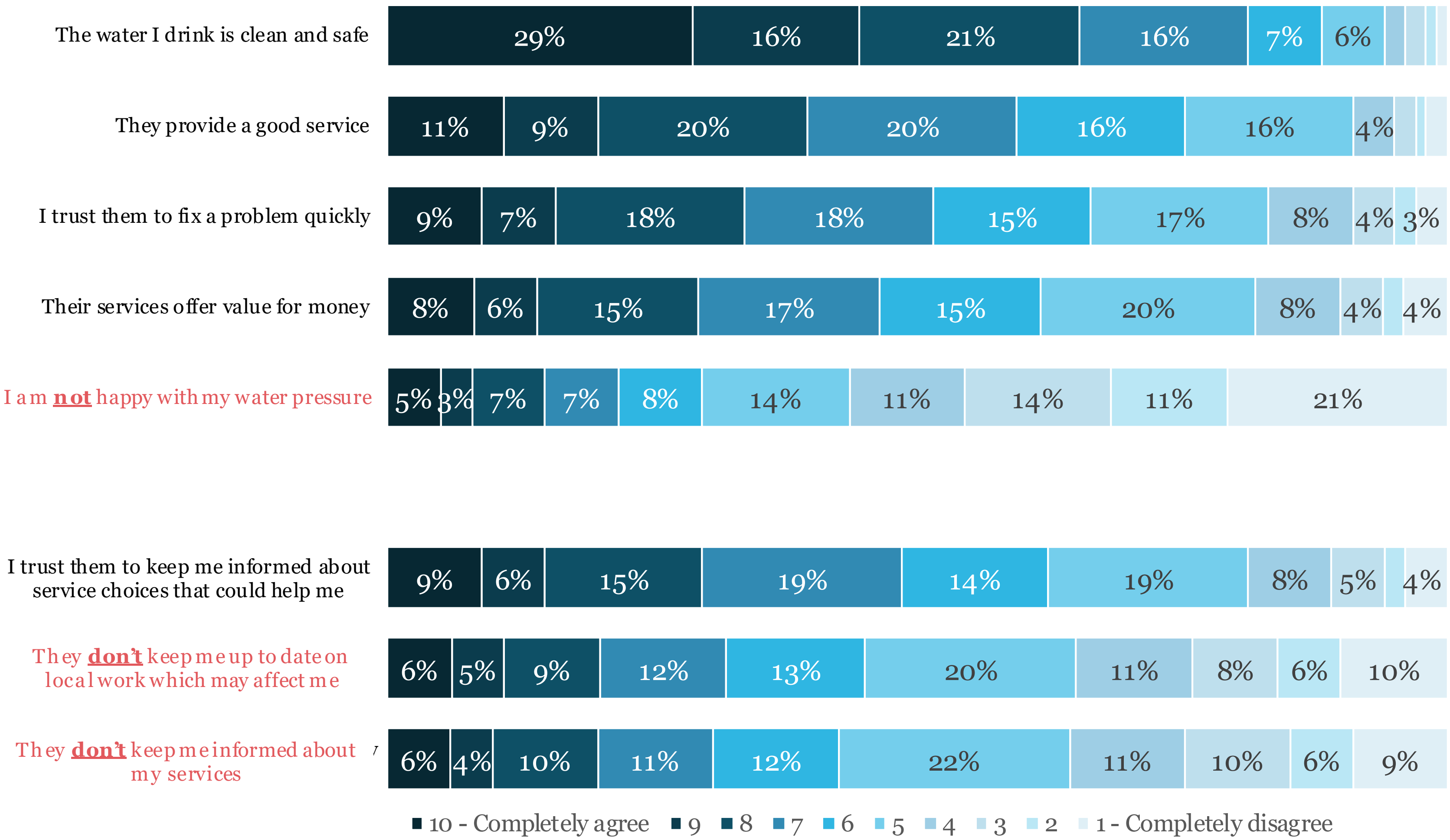
Due to rounding, answer options may not add up to a sum equal of the individual statements

Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2,623), Respondents based in England (n=2,116), Respondents based in Wales (n=507), Digitally disenfranchised respondents (n=100) and Ethnic minority respondents (n=600)

Two thirds score their water's cleanliness and safety at least eight out of ten but significantly fewer feel they are kept well up to date

Service

Communications



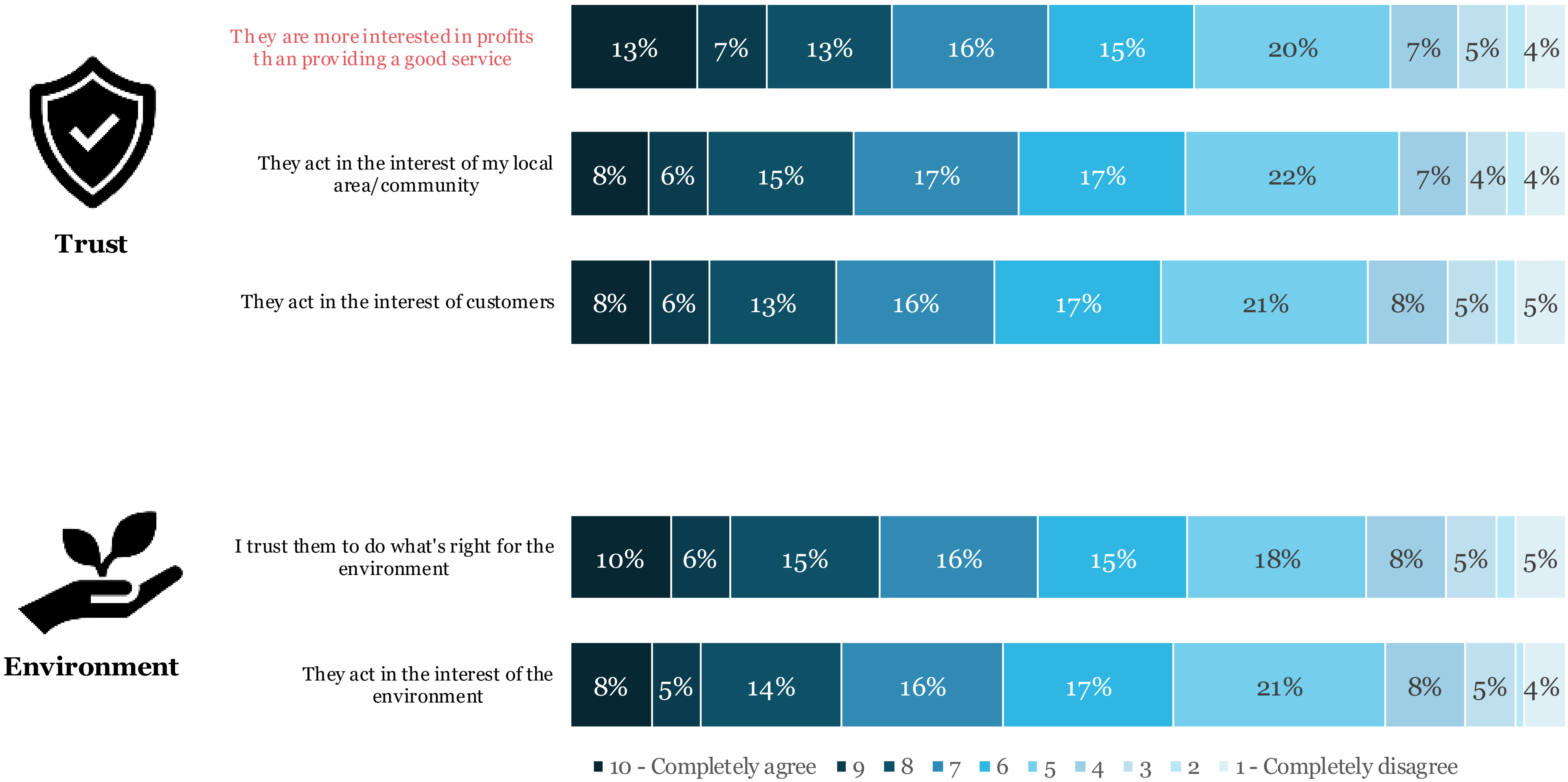
The majority (**65%** rating 8-10 out of 10) believe that the water they drink is clean and safe. However, fewer believe they receive a good service (**40%**), trust their provider to fix a problem quickly (**34%**) or that their services offer value for money (**29%**). Relatively few were unhappy with their water pressure (**14%**).

Views on communications were more muted. **31%** trust their provider to keep them informed about service choices that could help them but **19%** actively believe they are not kept up to date about services.

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2,623)
Note: Areas written in red are negative and so high scores/agreement should be interpreted as negative sentiment.

Fewer than one in three consumers score water providers at least eight out of ten for acting in the interests of them or the environment



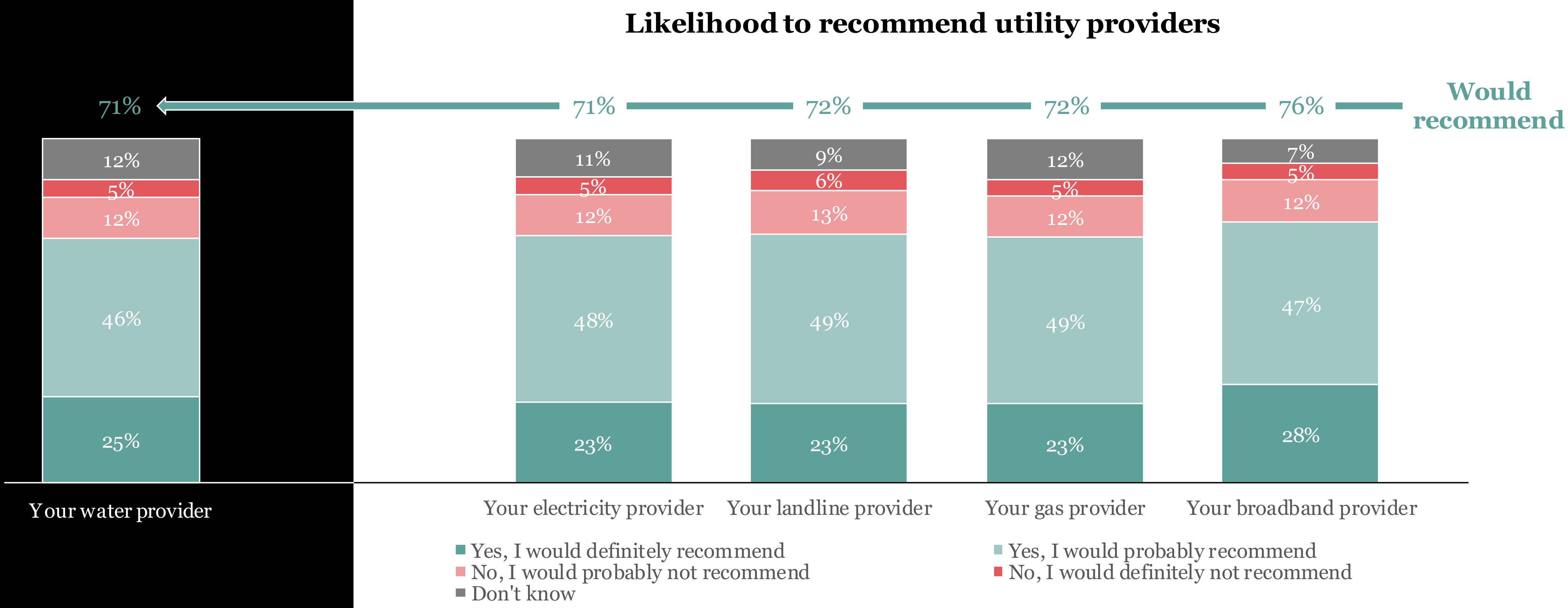
A substantial minority (**33%** rating 8-10 out of 10) believe water companies are more interested in profits than providing a good service. Fewer consumers agree that they act in the interest of the local area/community (**29%**) or consumers (**27%**).

Less than a third (**31%**) trust water companies to do what's right for the environment, with closer to a quarter saying they act in the interest of the environment (**27%**).

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2,623)
Note: Areas highlighted in red are negative and so high scores/agreement should be interpreted as negative sentiment.

Seven in ten would recommend their water provider to a family or friend, which is in line with most other utilities

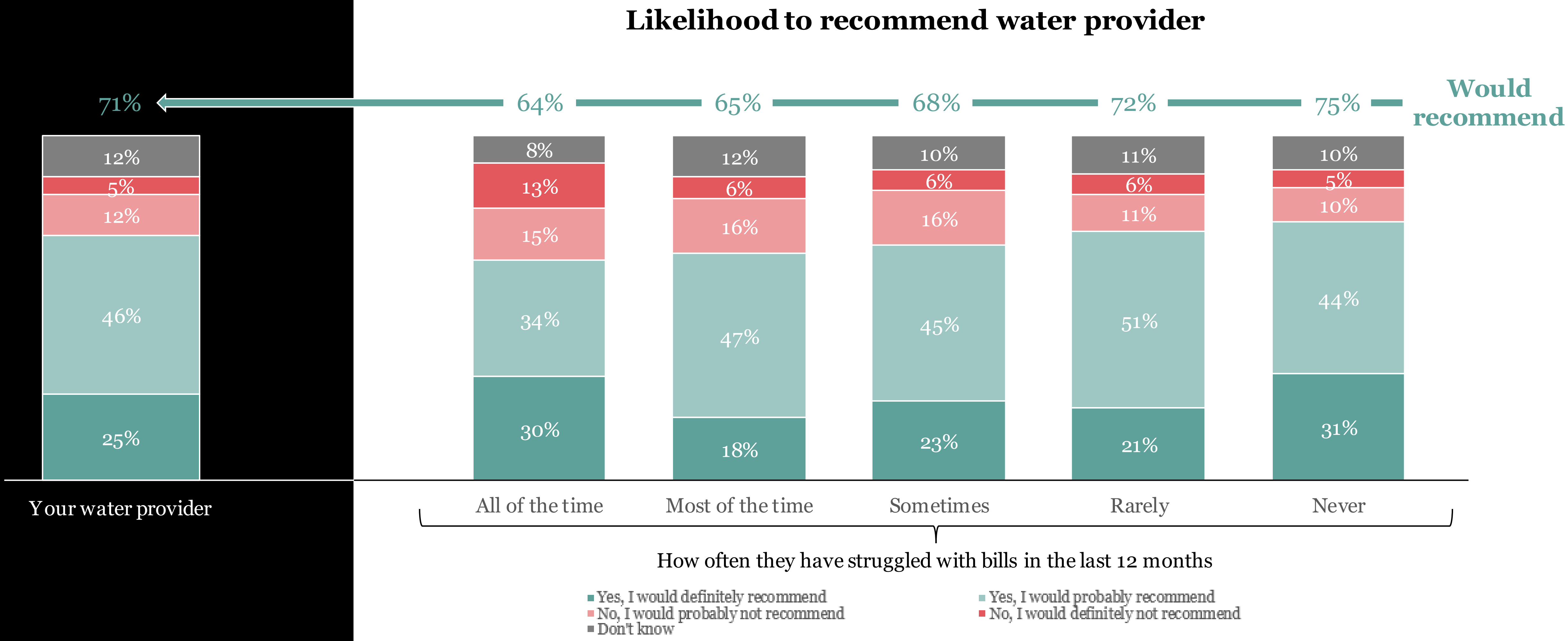


Due to rounding, answer options may not add up to a sum equal of the individual statements

Q24. Would you recommend your provider for the services they provide to a family member or friend? Base: All respondents excluding NA (n=2,186-2,565)

Savanta:

Those that have struggled to pay their bills in the last 12 months were less likely to recommend their water provider



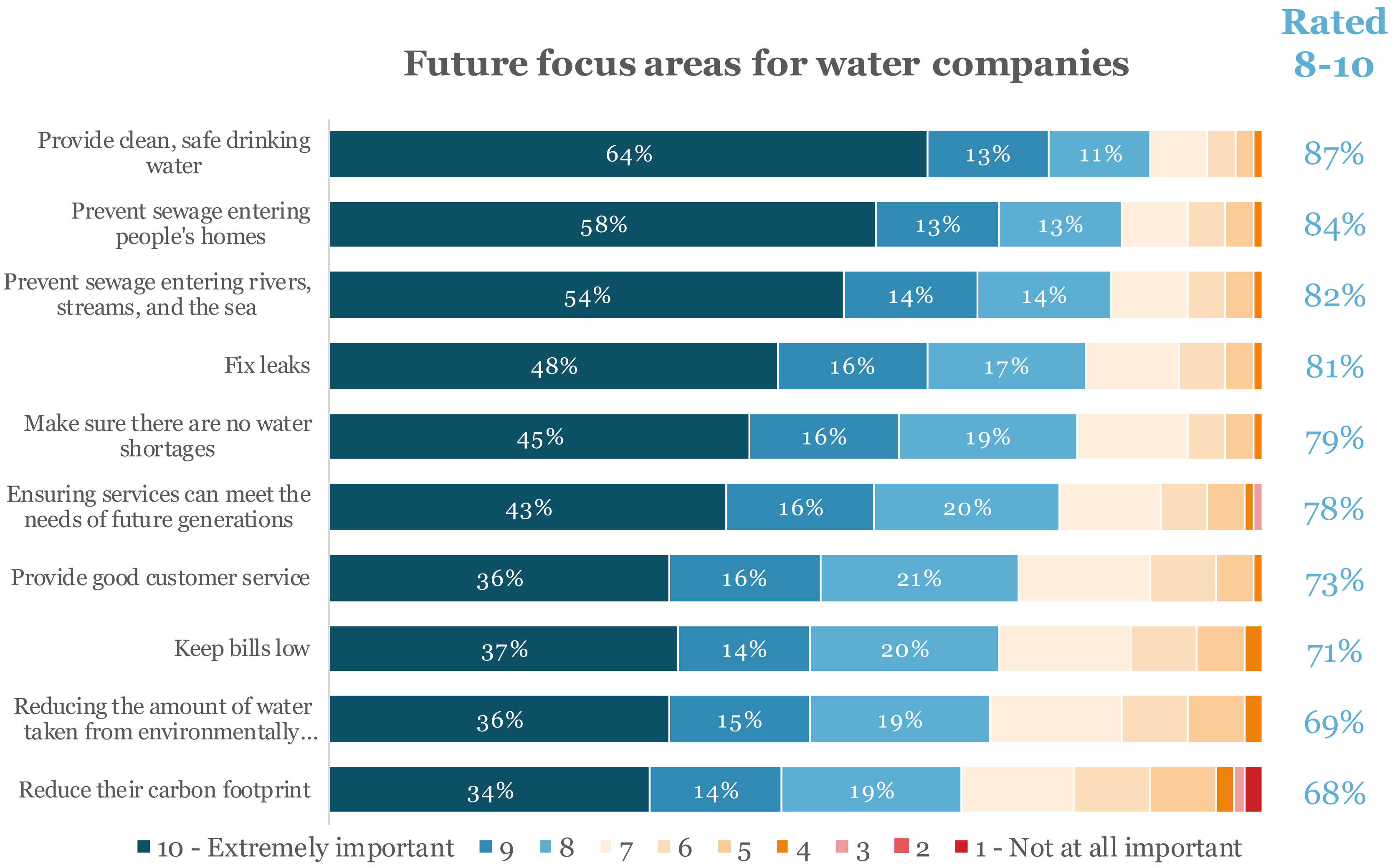
Q24. Would you recommend your provider for the services they provide to a family member or friend? Base: All respondents excluding NA (n=2,529)

Key insights into consumer satisfaction with their water providers and the services they receive

- Two thirds (**65%**) were happy with the water services they receive but only **40%** believe they receive a good service.
- Overall, seven in ten (**71%**) would recommend their water provider, which is similar to the corresponding proportion for other utilities.
- In contrast, just over half (**56%**) were happy with the wastewater and drainage services.
- Fewer still, under a third (**31%**), trust their provider to keep them informed about service choices that could help them.
- A similar proportion (**31%**) trust their provider to do what is right for the environment, with only a quarter (**27%**) saying they act in the interest of the environment.
- More people, (**33%** rating 8-10 out of 10) believe water companies are more interested in profits than providing a good service.

5. Which priorities do consumers want water providers to focus on in the future?

Providing clean, safe drinking water was ranked the most important area for future focus



Due to rounding, answer options may not add up to a sum equal of the individual statements

The top two statements with the highest agreement focus on basic service deliverable such as ensuring supply and preventing disruption.

Over two thirds (**68%**) agree that water companies should plan to reduce their carbon footprint over the next 10-20 years.

Seven in ten (**71%**) think that water companies should focus on keeping bills low.

Q36. Thinking about your water company and their focus over the next 10-20 years, please rate the following on a scale from 1 to 10 according to how important they are for you, with 10 being extremely important and 1 being not at all important. Base: All respondents (n=2,623)

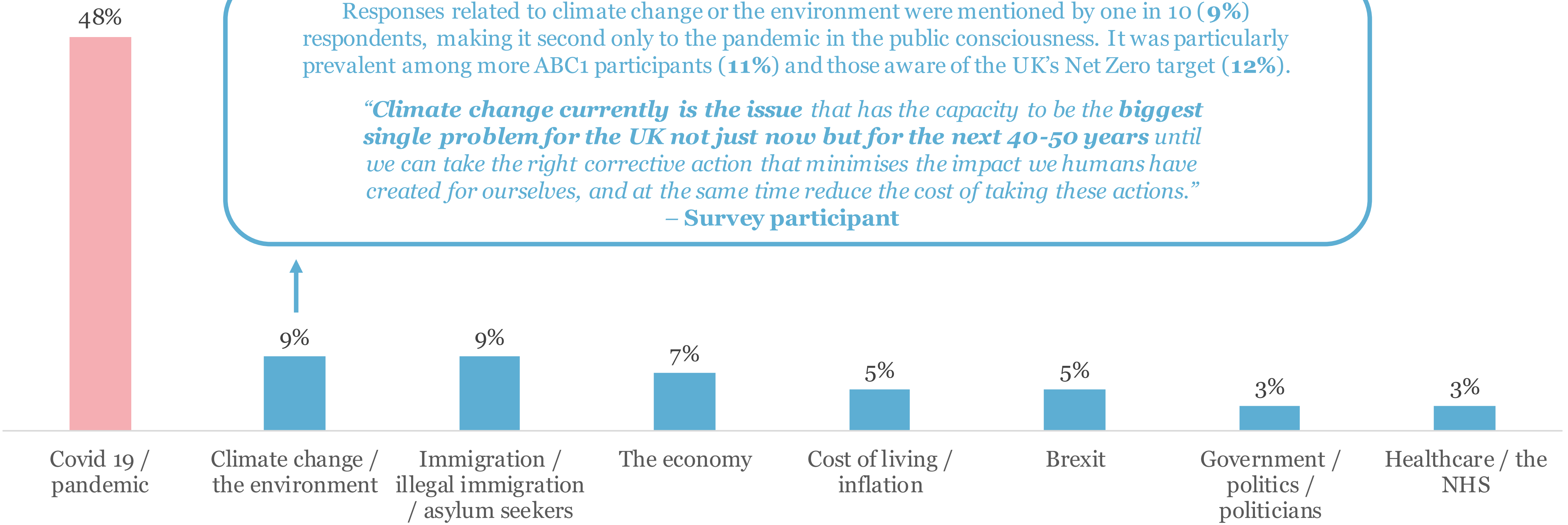
Savanta:

Climate change was the joint-second most important issue facing the UK in late 2021, second only to the COVID-19 pandemic

The most important issue facing the UK right now (spontaneous)

Responses related to climate change or the environment were mentioned by one in 10 (**9%**) respondents, making it second only to the pandemic in the public consciousness. It was particularly prevalent among more ABC1 participants (**11%**) and those aware of the UK's Net Zero target (**12%**).

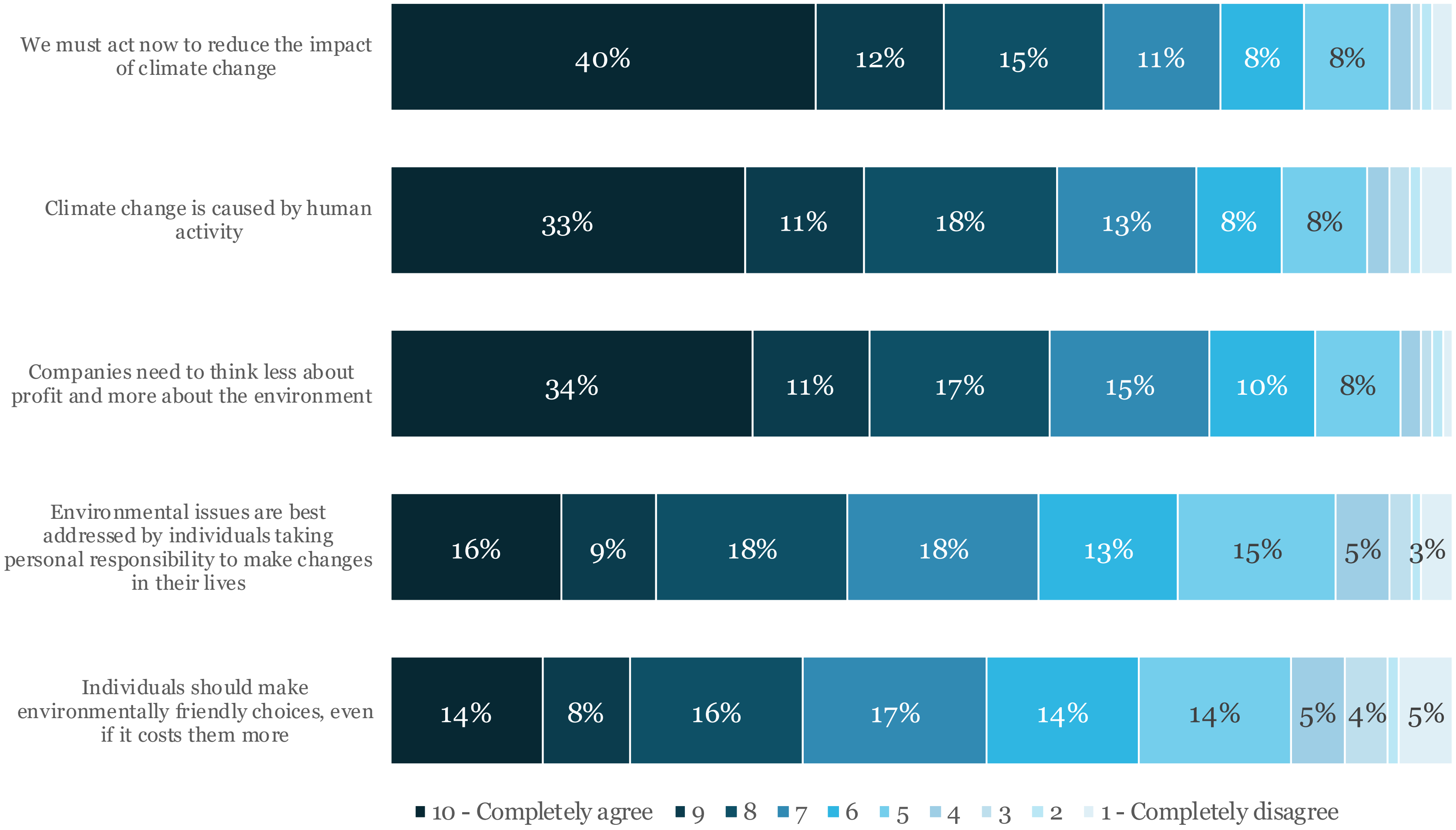
*"**Climate change currently is the issue** that has the capacity to be the **biggest single problem for the UK not just now but for the next 40-50 years** until we can take the right corrective action that minimises the impact we humans have created for ourselves, and at the same time reduce the cost of taking these actions."*
– Survey participant



Reasons stated by less than 3% not shown in table

Q3a. What do you think is the most important issue facing the UK right now? (Coded) Base: All respondents (n=2,623)

The public believe action on climate change is needed but were less emphatic about the burden being on individuals to change their lives



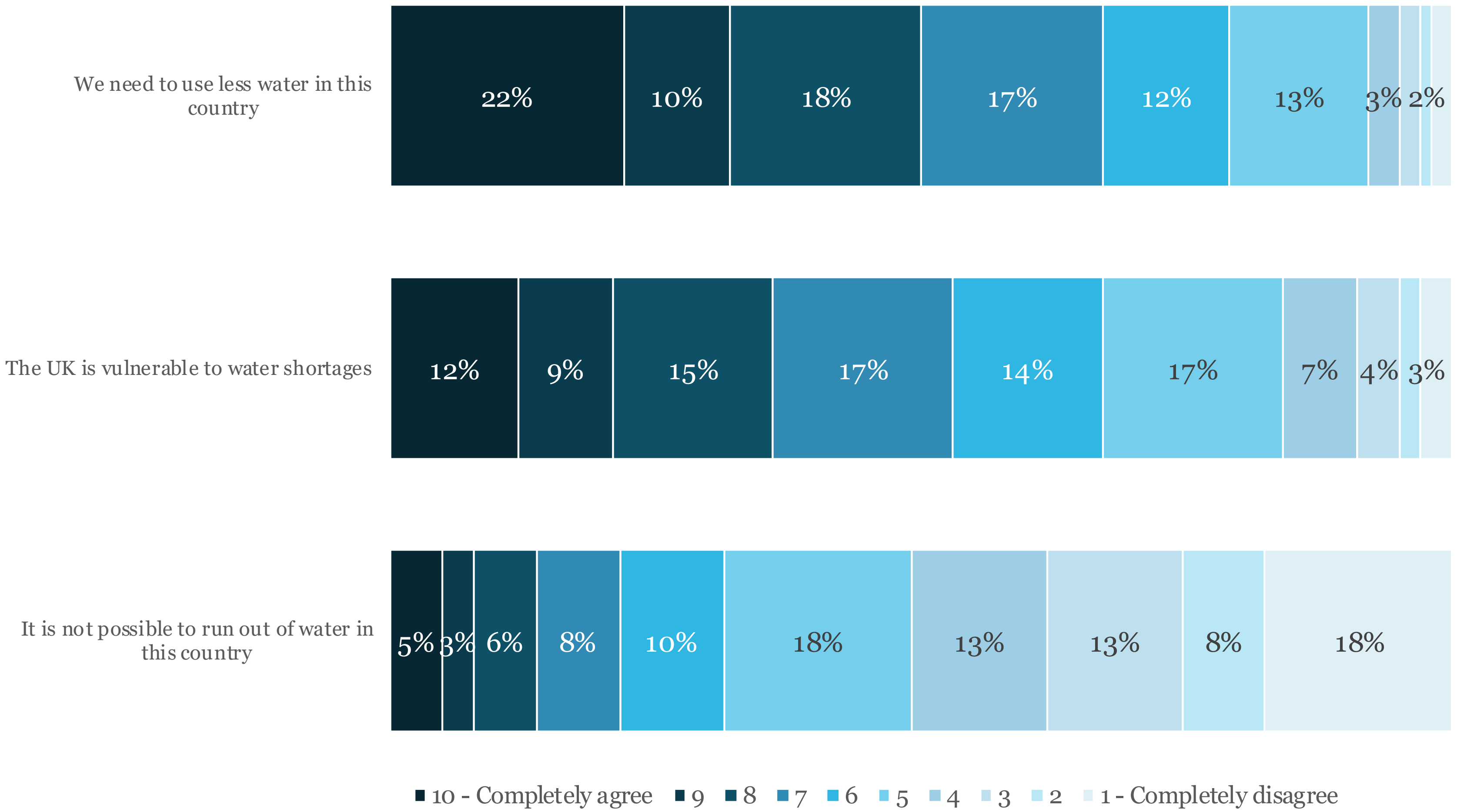
A significant majority (**67%** rating 8-10 out of 10) believe that we must act now to reduce the impact of climate change. This is higher among younger participants (18-34s = **71%**) and those aware of the term Net Zero (**73%**).

However, fewer believe that individuals should make environmentally friendly choices even if it costs more (**39%**) and the population is lukewarm on the environmental issues being best addressed by individuals taking personal responsibility to make changes to their lives (**43%**).

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q14. To what extent do you agree or disagree with the following statements about the environment? Base: All respondents (n=2,623)

Half believe that the UK should use less water, but only a third believe that it is vulnerable to water shortages



Due to rounding, answer options may not add up to a sum equal of the individual statements

Half (**50%** rating 8-10 out of 10) believe that we need to use less water in this country. This is higher for older participants (55+ = **55%**) and for those aware of the term Net Zero (**55%**).

Fewer consumers believe that the UK is vulnerable to water shortages (**35%**) but only one in seven (**14%**) actively think it is not possible to run out of water in this country.

Q14. To what extent do you agree or disagree with the following statements about the environment? Base: All respondents (n=2,623)

Key insights into the priorities that consumers want water providers to focus on in the future

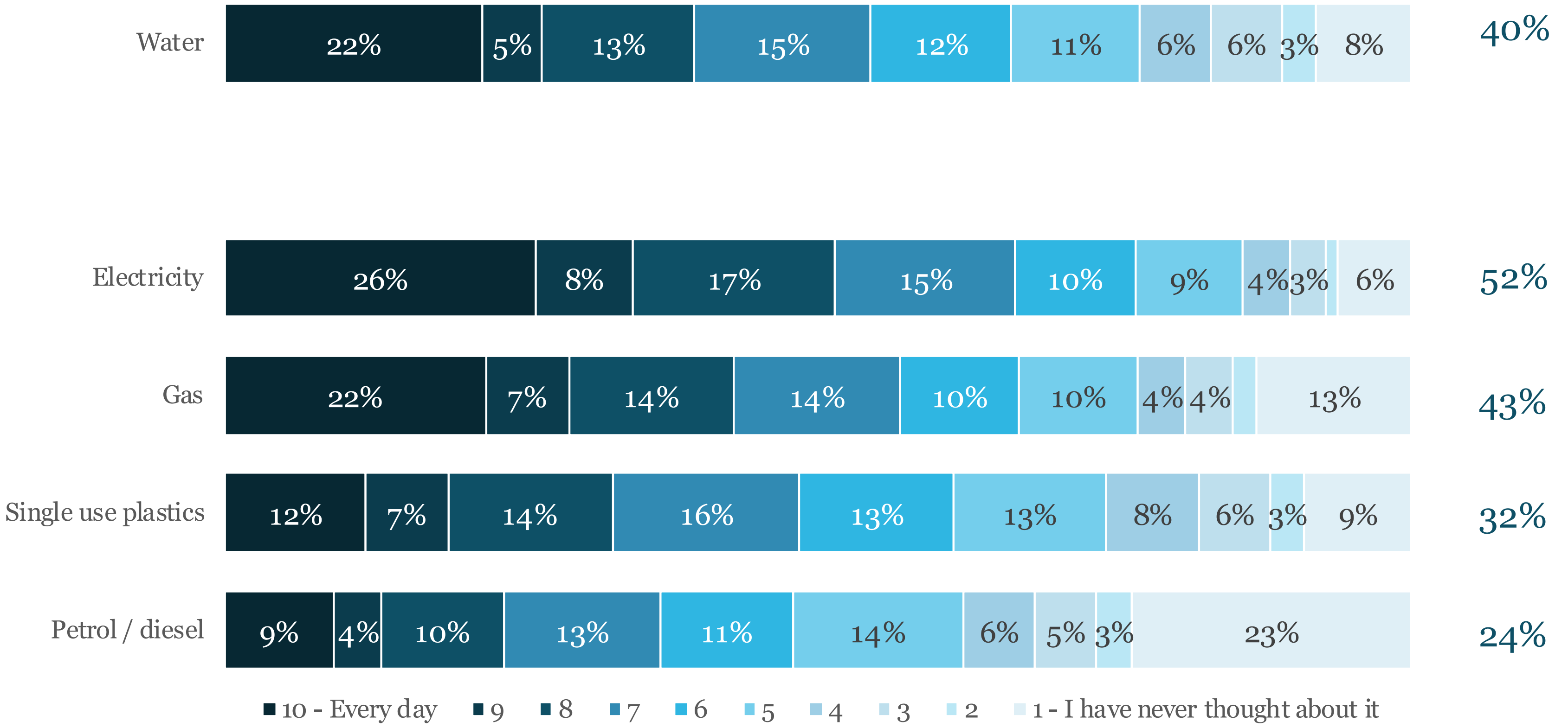
- The survey took place during the Covid-19 pandemic but has highlighted some key areas that people want the companies to focus on in the future.
- Over four fifths (**87%**) of customers want companies to focus on providing clean, safe drinking water and a similar proportion (**84%** and **82%**) want them to focus on preventing sewage entering both consumers' homes and bodies of water.
- Climate change was the joint-second most important issue facing the UK in late 2021, second only to the COVID-19 pandemic. Two thirds (**67%**) believe we must act now to reduce the impact of climate change.
- However, fewer believe that individuals should make environmentally friendly choices even if it costs more (**39%**) and the population is lukewarm on the environmental issues being best addressed by individuals taking personal responsibility to make changes to their lives (**43%**).
- Half believe that we need to use less water in this country. However, significantly fewer consumers believe that England and Wales are vulnerable to water shortages (**35%**) while one in seven (**14%**) believe we will not run out of water.

6. How do consumers think about water use and the environment?

2 in 5 think about their water usage often

How often, if at all, do you think about how much you use the following?

Rated 8-10



Due to rounding, answer options may not add up to a sum equal of the individual statements

Half of the population think about energy usage often compared to 40% for water

Water usage is the third highest commodity thought of after electricity (**52%**) and gas (**43%**).

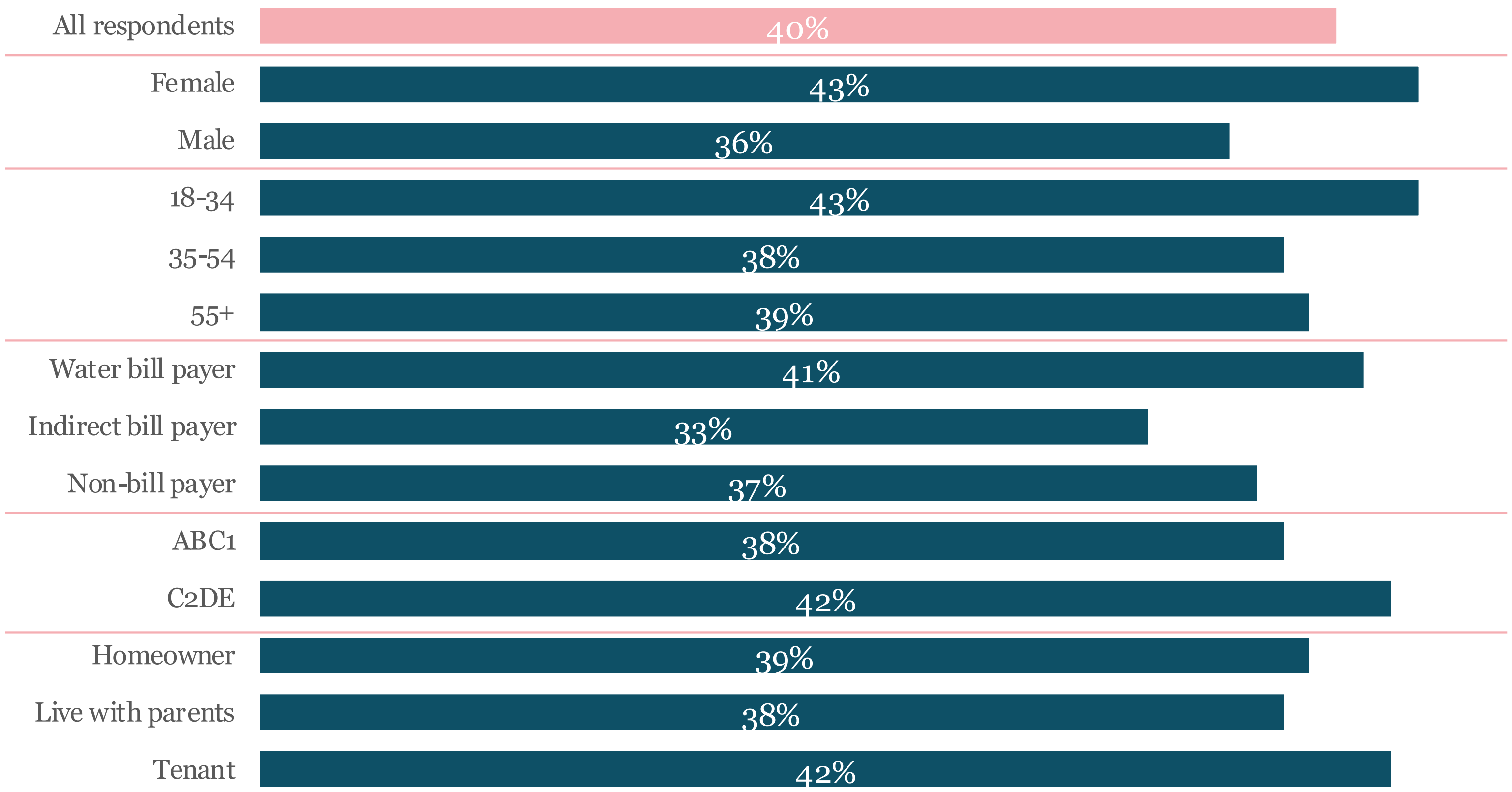
A third (**32%**) say they think about their usage of single use plastics often and a quarter (**24%**) say they think about the usage of petrol/diesel often.

Q10. How often, if at all, do you think about how much you use of the following? Base: All respondents (n=2,623)

Women thought about their water usage more often than men

How often, if at all, do you think about how much you use water?

Scored 8-10/10



Demographic differences

Women (**43%**) were significantly more likely to think about their water usage often compared to men (**36%**); as were 18-34-year-olds (**43%**) compared to older age groups.

There were no significant differences in terms of water bill payer status when it came to thinking about water usage.

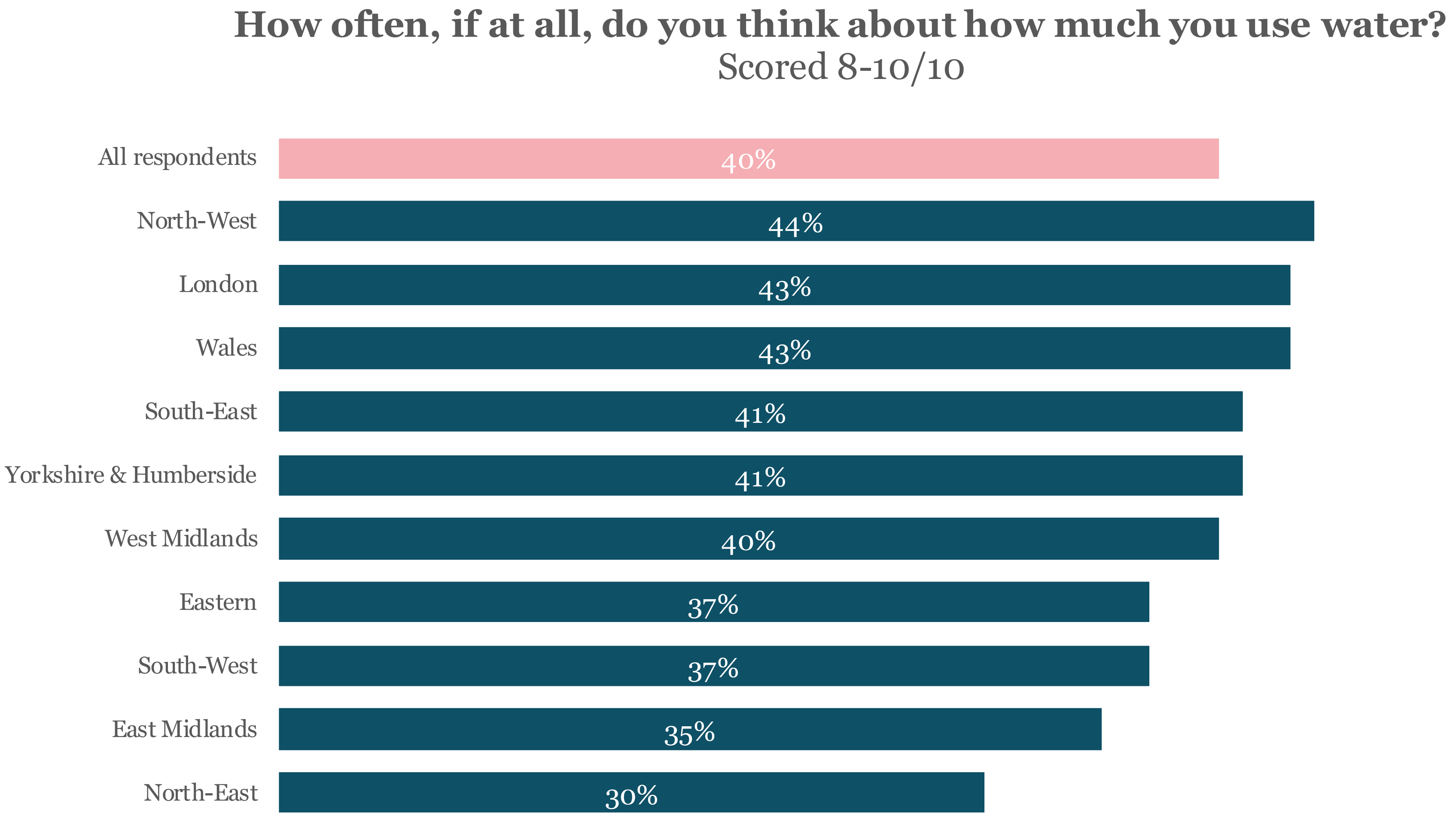
Those in the C2DE (**42%**) social group were significantly more likely to think about water usage compared to those in ABC1 (**38%**).

There were no significant differences in thinking about water usage in terms of living status or disability.

Disability	**%**
Myself	44%
Another person in my household	39%
No	39%

Q10. How often, if at all, do you think about how much you use of the following? Base: All respondents (n=2,623)

Those in the North West and those with a water meter were significantly more likely to think more often about their water usage



Demographic differences

Consumers living in the North-West (**44%**), London (**43%**) and Wales (**43%**) were most likely to think about their water usage often followed by those living in the South-East (**41%**), Yorkshire & Humberside (**41%**) and West-Midlands (**40%**). Those living in Eastern (**37%**), South-West (**37%**), East Midlands (**35%**) and North-East (**30%**) were less likely to think about their water usage often compared to the total average.

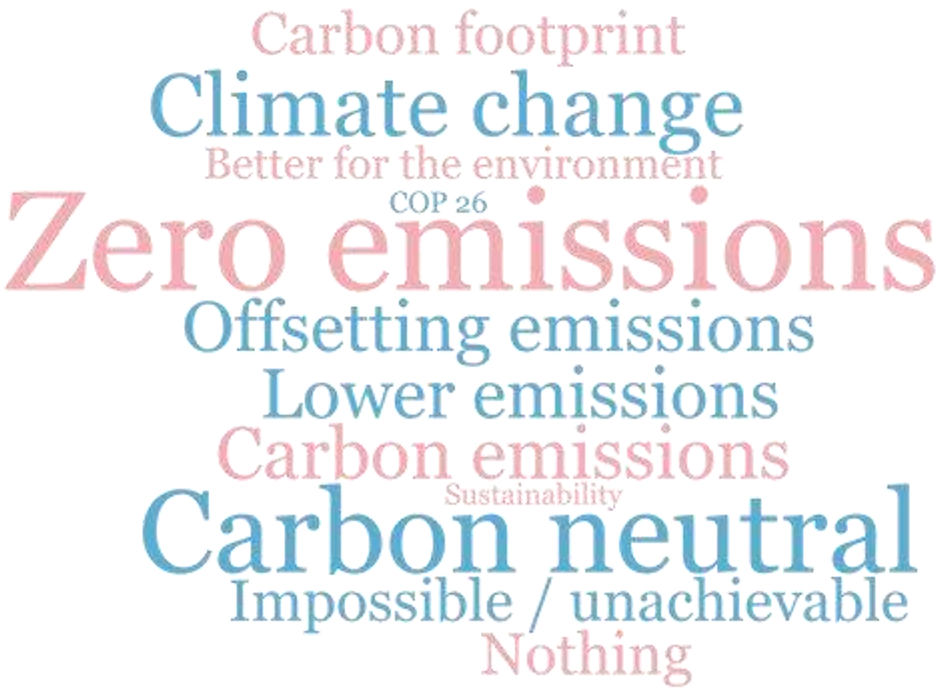
Those living in urban areas (**44%**) were significantly more likely to think about their water usage often compared to those living in suburban (**37%**) and rural areas (**39%**). There were no significant differences between those with access to a garden (**40%**) and those who do not have a garden (**38%**).

Respondents who have a water meter (**46%**) were significantly more likely to think about their water usage often compared to those who do not have a water meter (**34%**).

Q10. How often, if at all, do you think about how much you use of the following? Base: All respondents (n=2,623)

Those with a greater awareness of Net Zero were more focussed in their responses in what it brought to mind vs. tackling climate change

Associations with Net Zero (among those who know the term)

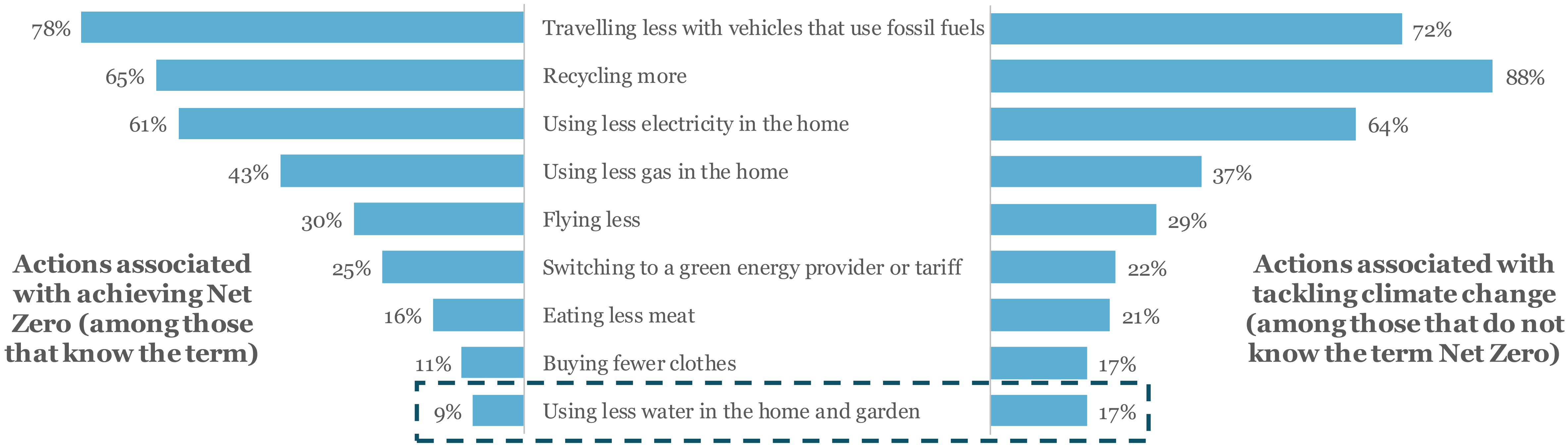


Associations with tackling climate change (among those who do not know the term)

Don't know, other and nothing not included

Q16a. When thinking about the term Net Zero, what comes to mind? (Coded) Base: Respondents who have heard of the term Net Zero (n=1,276)
Q17a. When thinking about tackling climate change, what comes to mind? (Coded) Base: Respondents who are less aware or unaware of the term Net Zero (n=1,344)

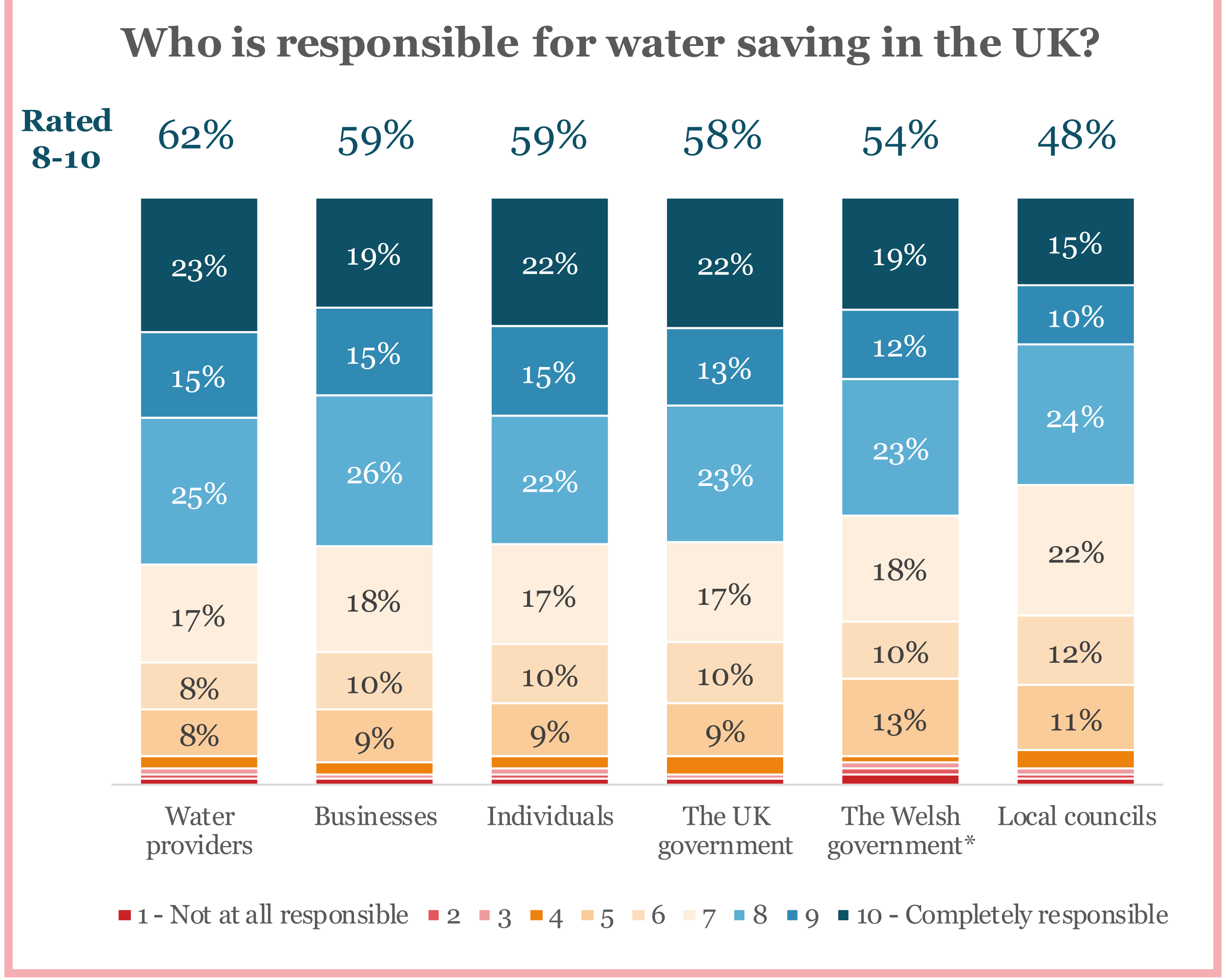
However, using less water in the home and garden is very low on the priority list for actions to achieve Net Zero and tackle climate change



Whether consumers know about the term Net Zero or not, the actions most associated with combatting climate change were decarbonising transport, recycling more and reducing electricity usage in the home. Of the options provided, the least frequently selected option was 'using less water in the home and garden', showing that it is rarely strongly linked with climate change or the Net Zero target in consumers' minds.

Q16. Top 3 Rank: When thinking about achieving Net Zero targets, which of the following come to mind? Base: Respondents who have heard of the term Net Zero (n=1,226), Q17. Top 3 Rank: When thinking about tackling climate change, which of the following come to mind? Base: Respondents who are less aware or unaware of the term Net Zero (n=1,255). Graphs exclude those who selected Don't know and None of these.

Water providers, businesses, individuals and Governments were all seen as having broadly equal responsibility for water saving



In the event of water shortages, water providers (**62%**) were seen as having the most responsibility when it comes to saving water, followed by businesses (**59%**), individuals (**59%**) and the UK government (**58%**). The Welsh government (**54%**) and local councils (**48%**) were seen as slightly less responsible overall.

Men (**65%**) were significantly more likely to say water providers were more responsible than women (**60%**), as were 35-54-year-olds (**63%**) and those aged 55+ (**67%**) compared to 18-34-year-olds (**55%**).

Those living in Eastern England were also more likely to think water providers were responsible (**70%**) as were homeowners (**66%**).

Three quarters (**74%**) of the digitally disenfranchised audience think water providers were responsible for water saving and **65%** of ethnic minority respondents think water providers were responsible for water saving.

62% in England think water providers were responsible for saving water if water shortages occur in the UK and **64%** think the same in Wales.

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q19. If water shortages occur in the UK due to climate change and population growth, which of the following groups do you think should be responsible for water saving.
Base: All respondents (n=2,623), Digitally disenfranchised respondents (n=100), Ethnic minority respondents (n=600), Respondents based in England (n=2,116) and Respondents based in Wales (n=507). *Only asked of respondents in Wales (n=507)

Key insights into how consumers think about and use water

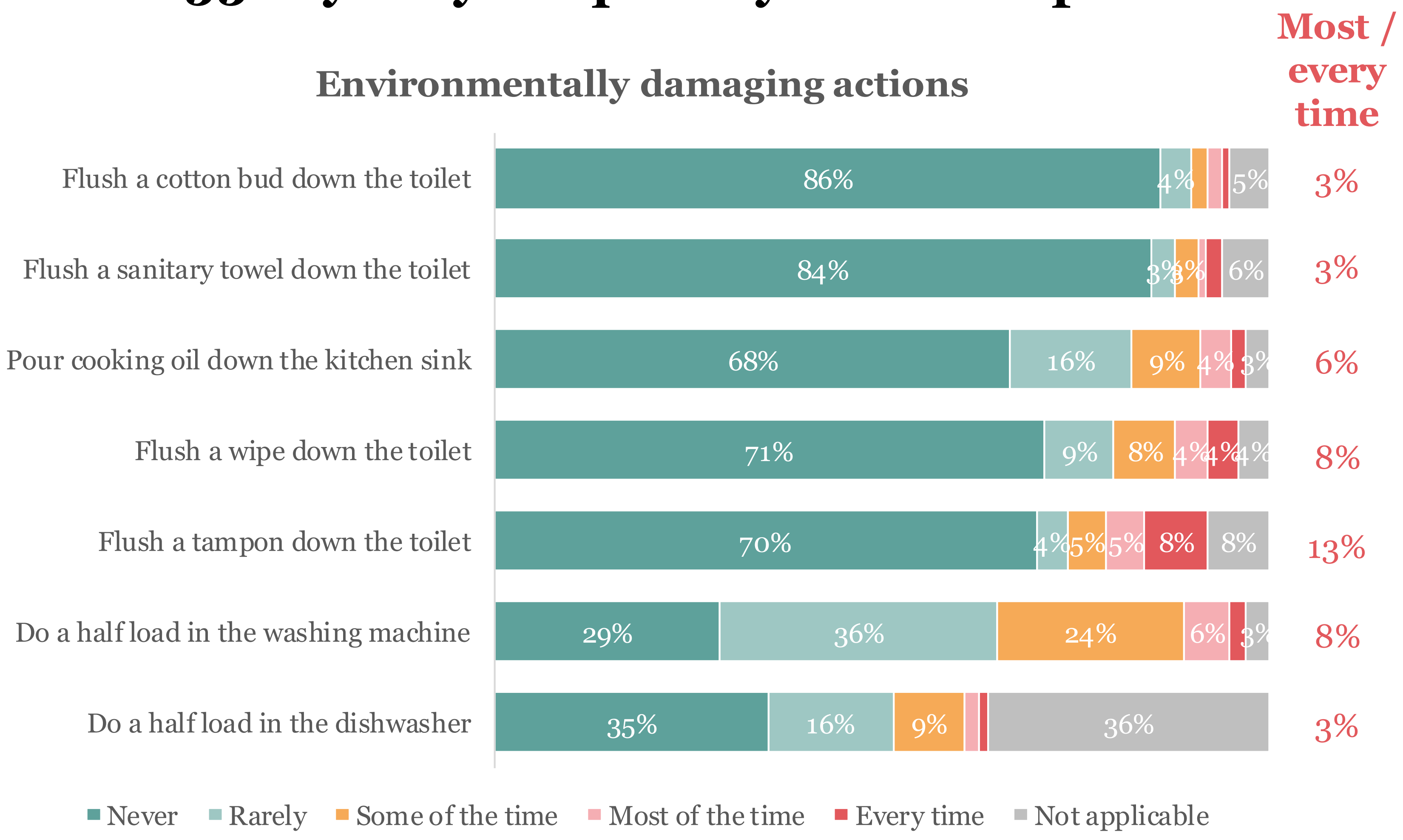
- Two in five (**40%**) think about their usage of water often. This is slightly lower than the corresponding proportion for gas (**43%**) and electricity (**52%**).

- However, consumers do not tend to link water usage with their considerations on the environment. The actions most associated with combatting climate change were decarbonising transport, recycling more and reducing electricity usage in the home. Of the options provided, the least frequently selected option was ‘using less water in the home and garden’, showing that it is rarely strongly linked with climate change or the Net Zero target in consumers' minds.

- Our data suggests that the public believe the responsibility for water sharing is not isolated to any one party. Three in five (**62%**) believe the responsibility sits with water providers, and slightly fewer believe it sits with both businesses (**59%**) and consumers (**59%**).

7. How frequently are consumers undertaking behaviours that impact the water environment?

The vast majority claim they never flush cotton buds or sanitary towels, but one in eight women under 55 say they frequently flush tampons



Non-flushable items

8% of consumers claim to frequently flush wipes, and **3%** frequently flush cotton buds down the toilet.

Incorrect disposal of cooking waste

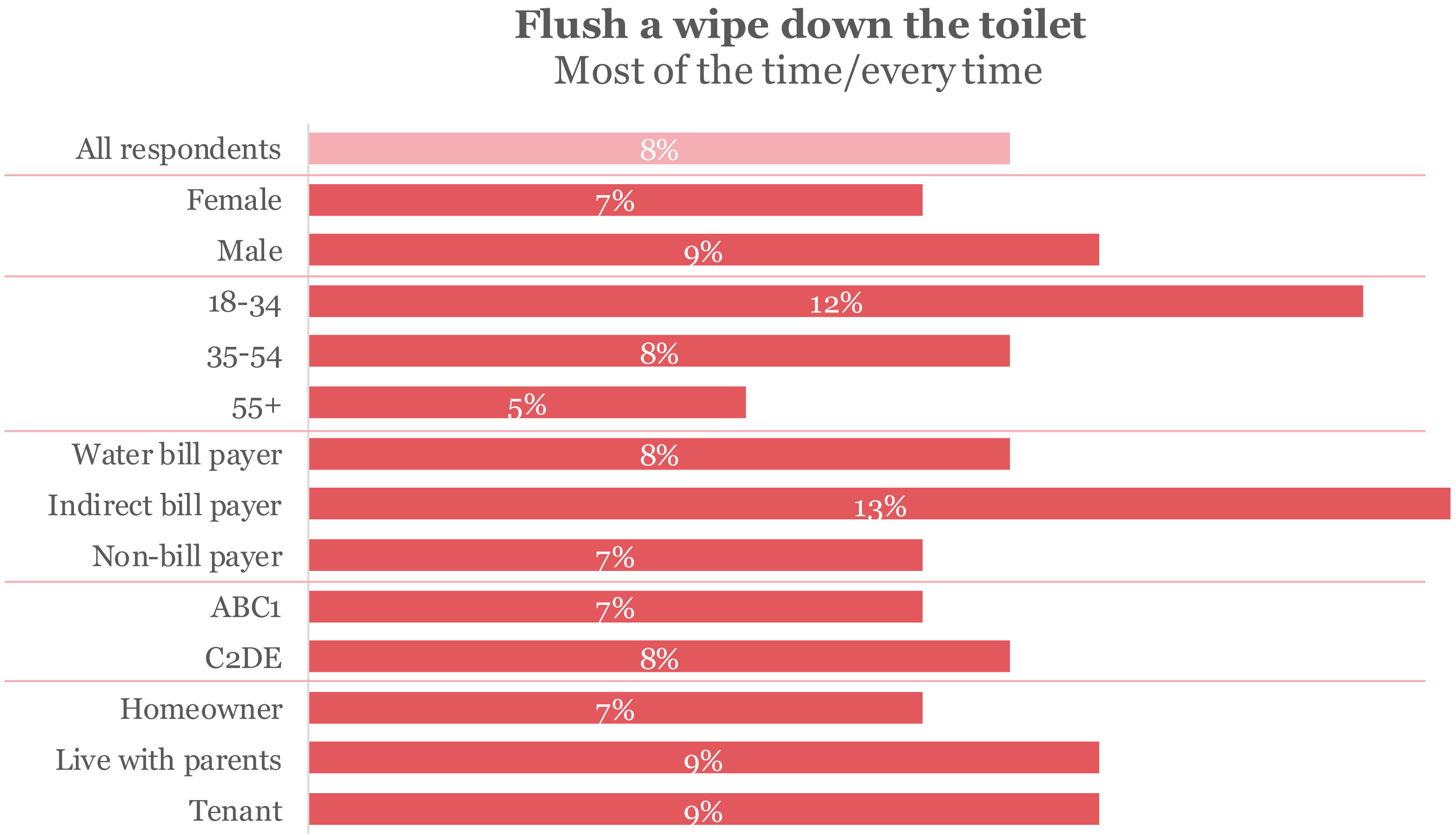
6% frequently pour cooking oil down the kitchen sink.

Inefficient machine running

8% of consumers claim to frequently do a half load in the washing machine and **3%** frequently do a half load in the dishwasher.

Q11. How often, if at all, do you yourself do the following in your home?
Base for statements relating to sanitary towels and tampons: All female respondents aged under 55 (n=875)
Base of other statements: All respondents (n=2,623)

Younger consumers were significantly more likely to flush a wipe down the toilet frequently compared to older consumers



Demographic differences

There were no significant differences between women (**7%**) or men (**9%**); younger consumers however (**12%**) were significantly more likely to flush a wipe down the toilet frequently compared to older age groups. This is likely to be linked to having children in the household: **12%** of those with children aged 0-3 years old reported flushing a wipe down the toilet most of the time or every time.

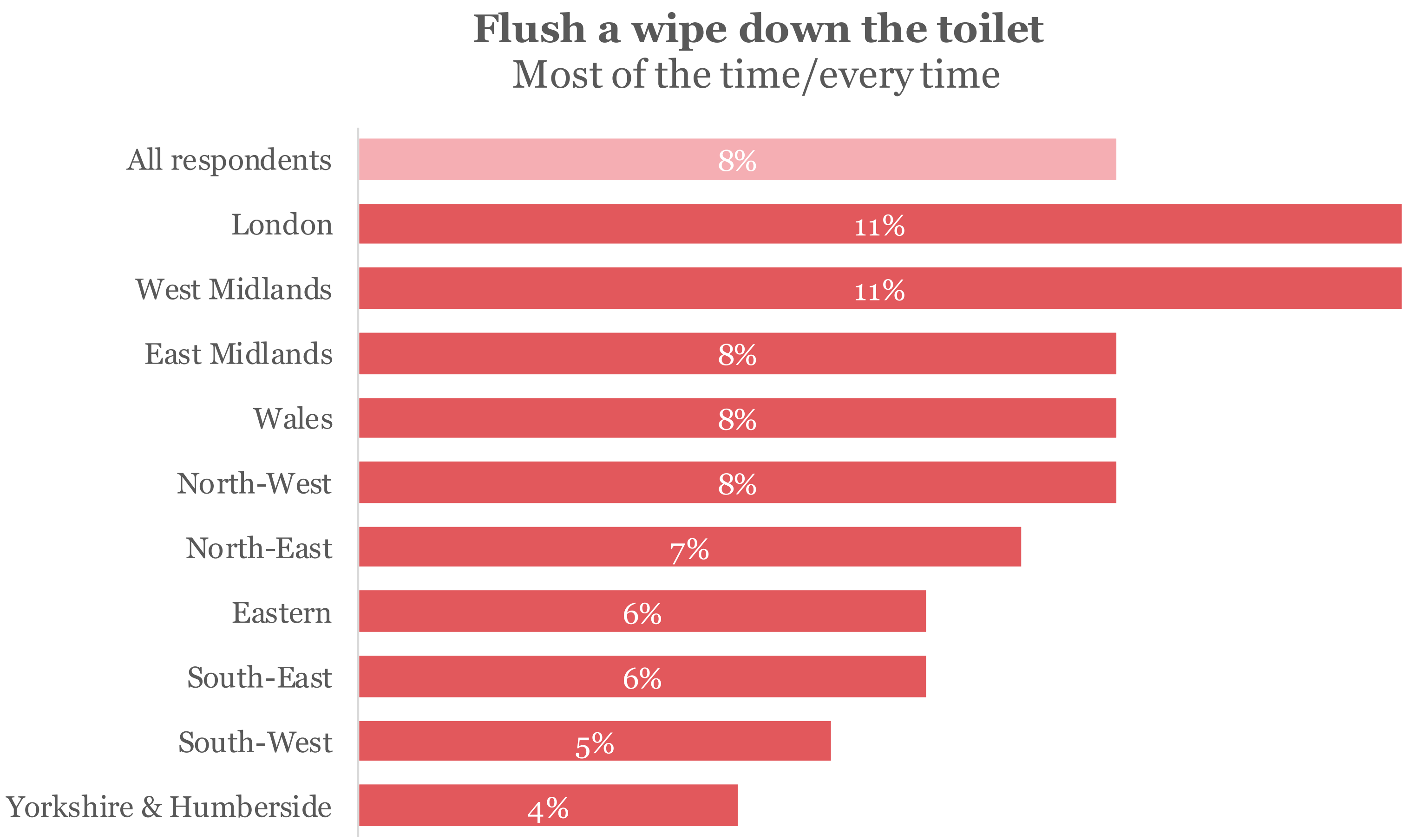
Indirect bill payers (**13%**) were significantly more likely to flush a wipe down the toilet frequently compared to bill (**8%**) and non-bill (**7%**) payers.

There were no significant differences between socio-economic grades, disability or living status.

Disability	**%**
Myself	8%
Another person in my household	7%
No disability	8%

Q11. How often, if at all, do you yourself do the following in your home? Base of other statements: All respondents (n=2,623)

Those living in urban areas were significantly more likely to flush a wipe down the toilet frequently compared to those living in other areas



Demographic differences

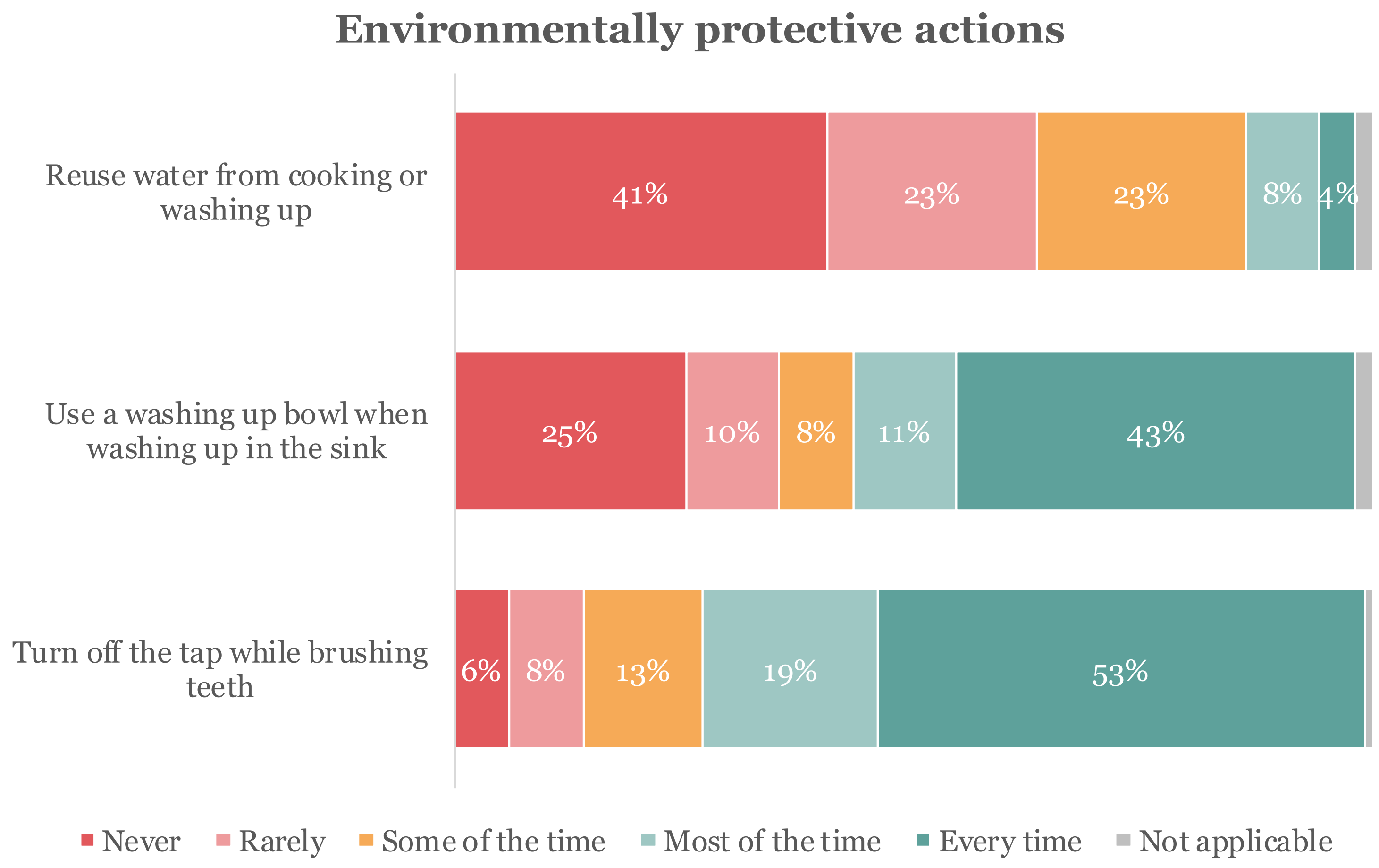
Consumers living in London (**11%**) and West Midlands (**11%**) were most likely to flush a wipe down the toilet frequently; all other regions were in line with or lower than the total average.

Those living in urban areas (**12%**) were significantly more likely to flush a wipe down the toilet frequently compared to those living in suburban (**6%**) and rural areas (**5%**).

There were no significant differences between those with access to a garden (**8%**) and those who do not have a garden (**10%**); and those who have a water meter (**8%**) and those who do not have a water meter (**8%**).

Q11. How often, if at all, do you yourself do the following in your home? Base of other statements: All respondents (n=2,623)

The majority of the respondents do not reuse water from cooking or washing up, but do tend to turn the tap off while brushing their teeth



2 in 5 (**41%**) never reuse water from cooking or washing up and a quarter (**25%**) never use a washing up bowl when washing up in the sink. Just over half (**53%**) turn off the tap while brushing their teeth every time.

Younger consumers were significantly more likely to never reuse water from cooking or washing up or use a washing up bowl compared to those aged 55+.

Statement	18-34	35-54	55+
Reuse water	**48%**	**46%**	31%
Use a bowl	**31%**	**27%**	19%

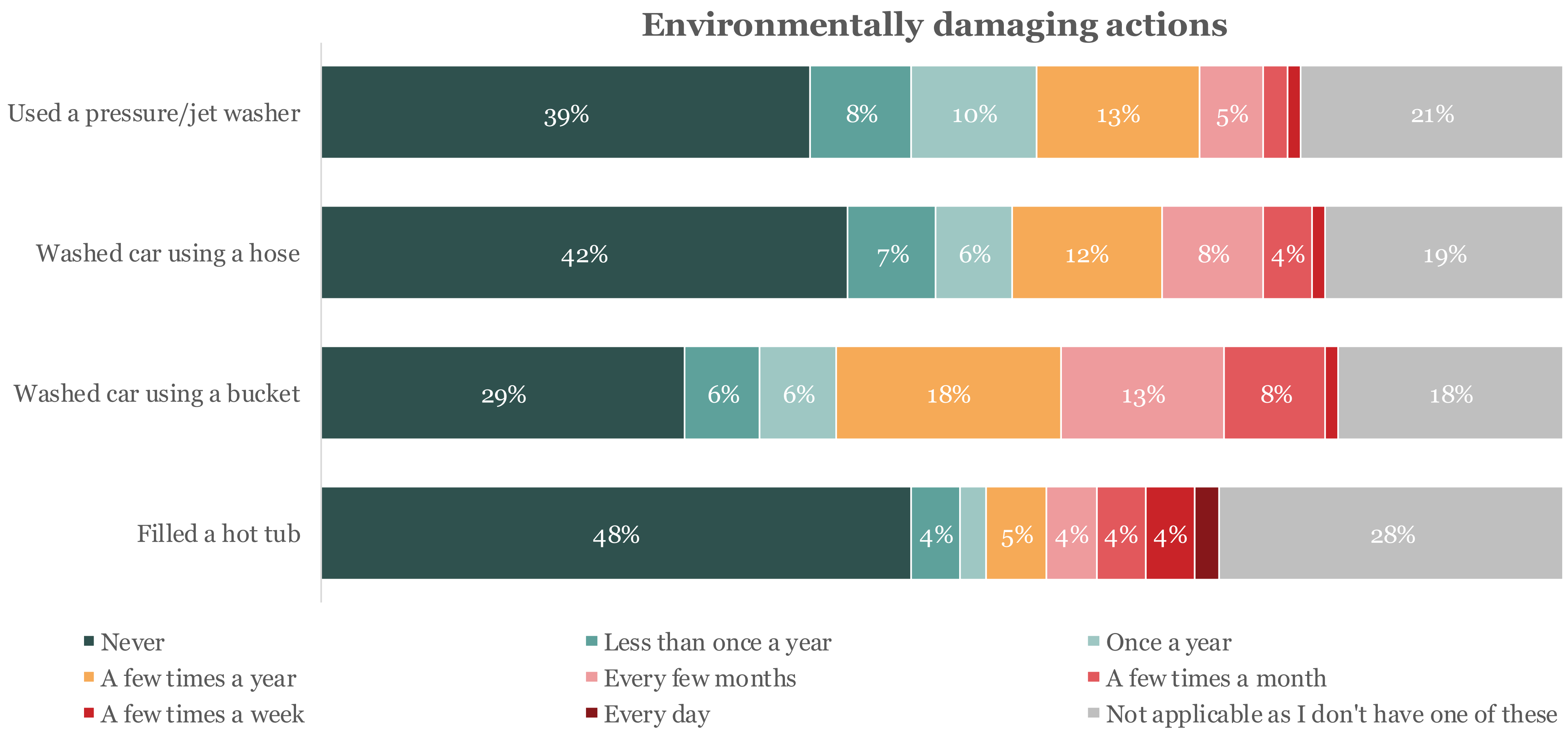
Those less aware or unaware of the term Net Zero were also significantly more likely to never reuse water or use a bowl for washing up.

Statement	Aware	Less aware / Unaware
Reuse water	36%	**45%**
Use a bowl	20%	**29%**

Ethnic minority respondents were more likely to claim to never reuse water from cooking or washing up (**48%**) or use a washing up bowl (**35%**).

Q11. How often, if at all, do you yourself do the following in your home? Base: All respondents (n=2,623) and Ethnic minority respondents (n=600)

One in five wash a car with a bucket at least ‘every few months’, compared to only one in 12 who have used a pressure/jet washer



At least ‘every few months’

8%

13%

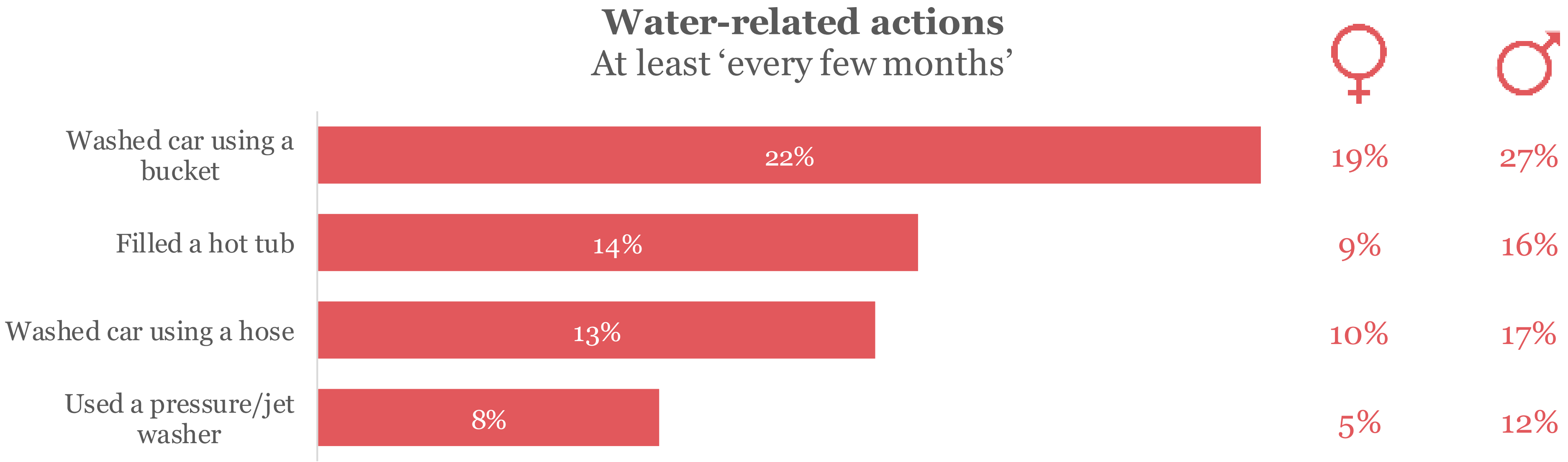
22%

14%

Due to rounding, answer options may not add up to a sum equal of the individual statements

Q12. How often, if at all, have you yourself done the following in or around your home, over the last 12 months? Base of other statements: All respondents (n=2,623)

Men were most likely to undertake those actions that use up a lot of water, such as filling a hot tub



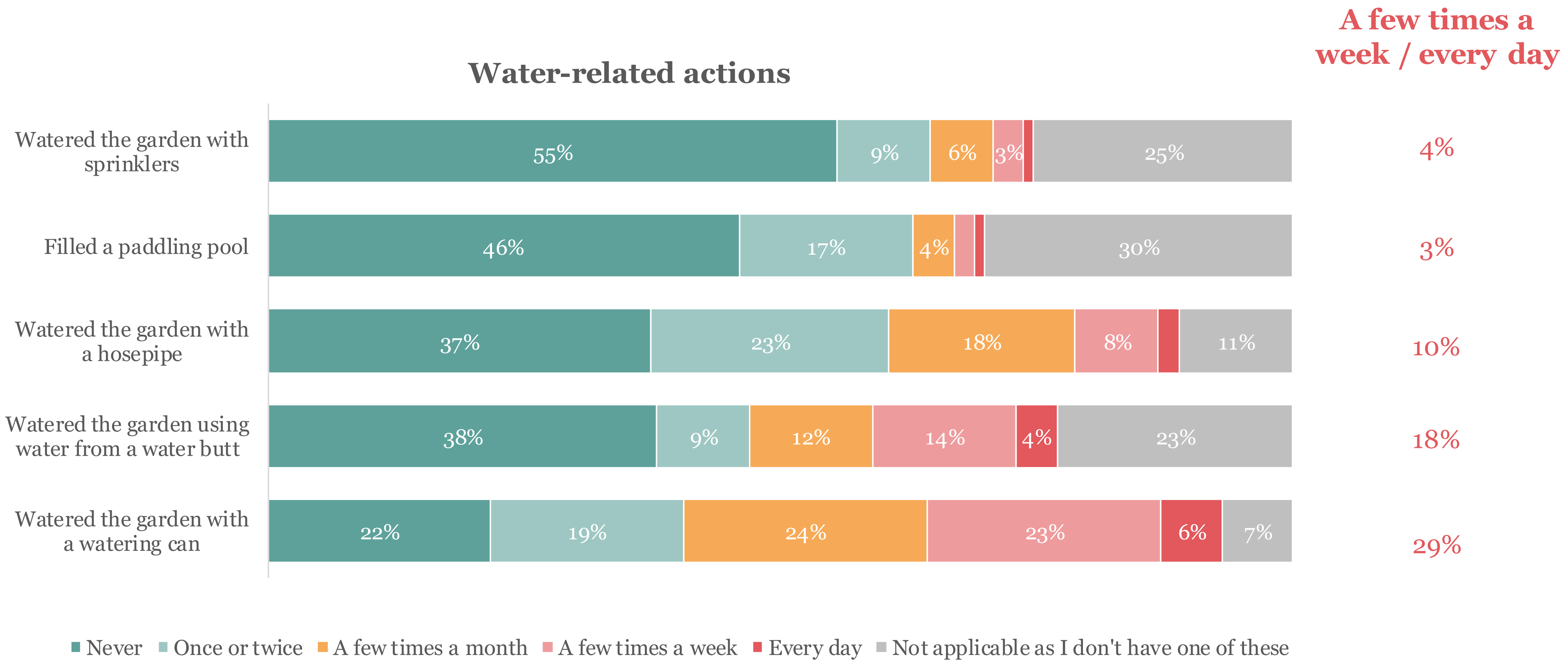
Men were more likely to score higher for doing all of the actions ‘every few months’ compared to women

Older age groups were more likely to use a bucket at least ‘every few months’ to wash a car and younger age groups were more likely to use a hose

Washed car using a ...	18-34	35-54	55+
Bucket	17%	23%	24%
Hose	15%	15%	11%

 Q12. How often, if at all, have you yourself done the following in or around your home, over the last 12 months? Base of other statements: All respondents (n=2,623)

Three times as many consumers frequently use a watering can rather than a hosepipe to water their garden



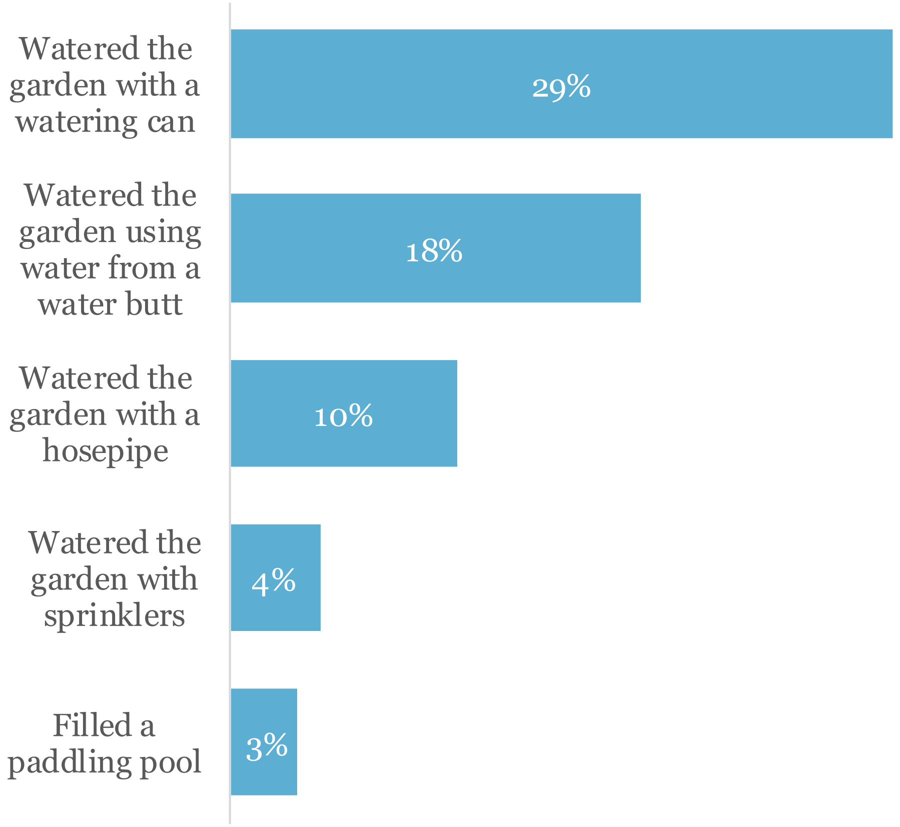
Due to rounding, answer options may not add up to a sum equal of the individual statements

Q12b. How often, if at all, do you yourself do the following in or around your garden during the summer months? Base: All respondents with a garden (n=2,293)

Savanta:

Older age groups were more likely to use a watering can or water from a water butt to water the garden

Water-related actions
A few times a week / every day



18-34	35-54	55+
23%	28%	32%
11%	16%	25%
13%	11%	8%
7%	5%	1%
5%	4%	0%

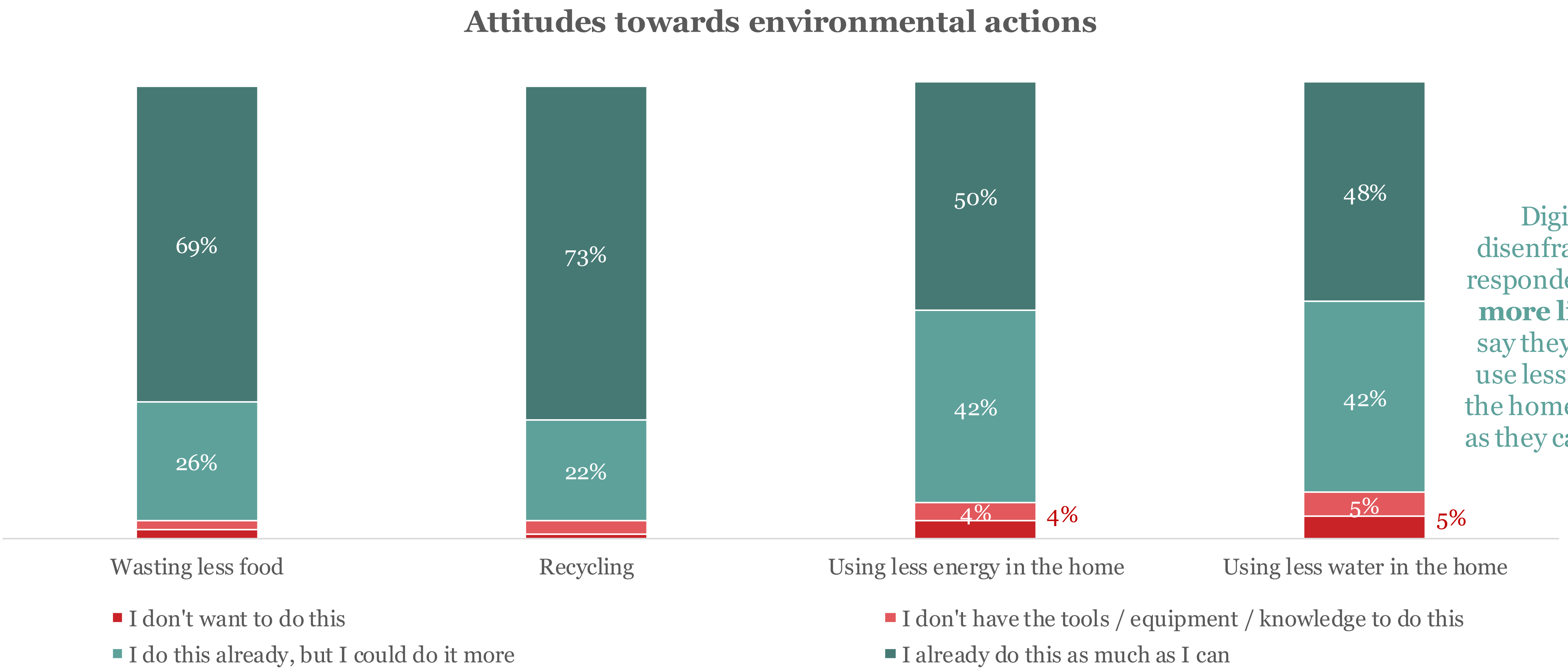
Older age groups were more likely to water the garden using a watering can or water from a water butt

Whereas younger age groups were more likely to water the garden using a hosepipe or sprinklers

Younger age groups were also more likely than older age groups to fill a paddling pool

Q12b. How often, if at all, do you yourself do the following in or around your garden during the summer months? Base: All respondents with a garden (n=2,293)

Around half of respondents say they are already using as little water as they can in the home, while two in five say they could do it more



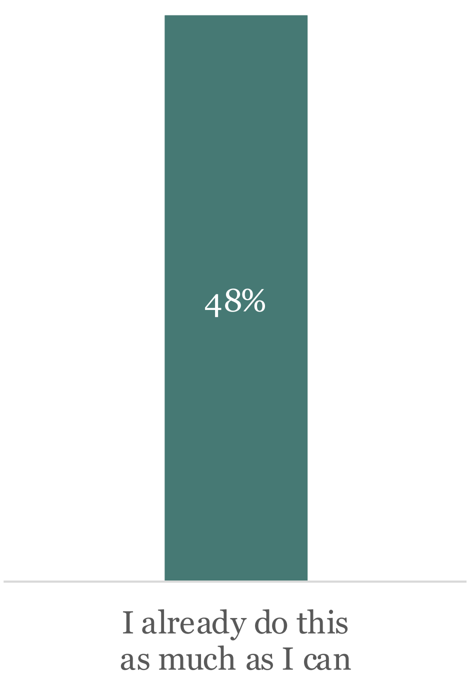
Digitally disenfranchised respondents were **more likely** to say they already use less water in the home as much as they can (**69%**)

None of these (<2%) not included in graph. Due to rounding, answer options may not add up to a sum equal of the individual statements.

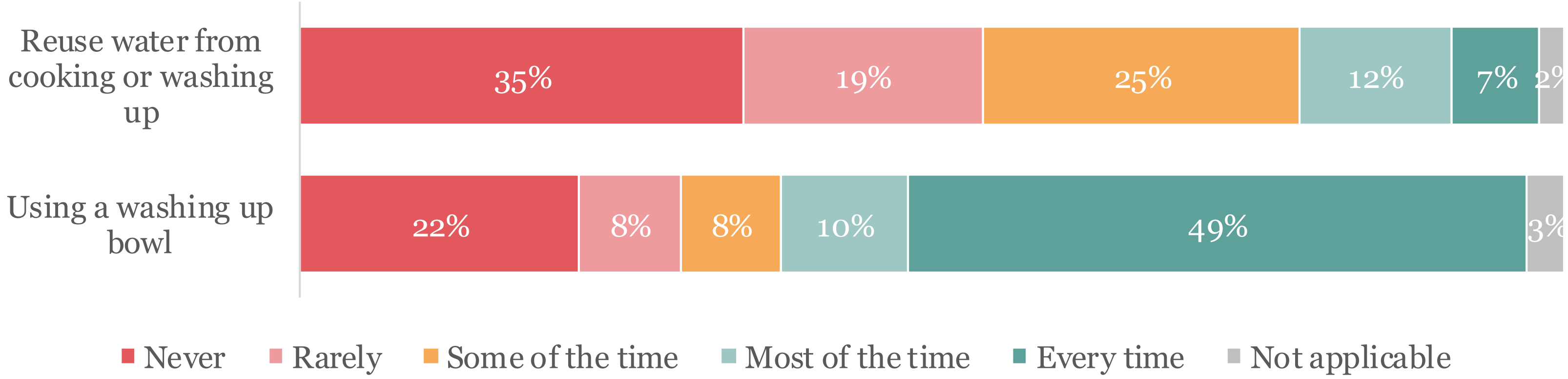
Q18. Please select the response that most reflects your view for the following statements. Base: All respondents (n=2,623) and Digitally disenfranchised respondents (n=100)

Of the respondents who said they already use as little water as they can in the home, a fifth never use a washing up bowl

Using less water in the home



Environmentally damaging actions



Over a third (**35%**) of those who say they already use as little water as they can in the home never reuse water from cooking or washing up and a fifth (**22%**) never use a washing up bowl.

When looking at those who say they already use as little water as they can in the home for the ethnic minority respondents this rises to **43%** who never reuse water from cooking or washing up and **29%** for never use a washing up bowl.

Q18. Please select the response that most reflects your view for the following statements. Base: All respondents (n=2,623) and Ethnic minority respondents (n=600)
Q11. Summary Table: How often, if at all, do you do the following in your home? Base: I already use less water in the home as much as I can (n=1,288, n=1,413)

Key insights into how consumers undertake behaviours that impact the water environment

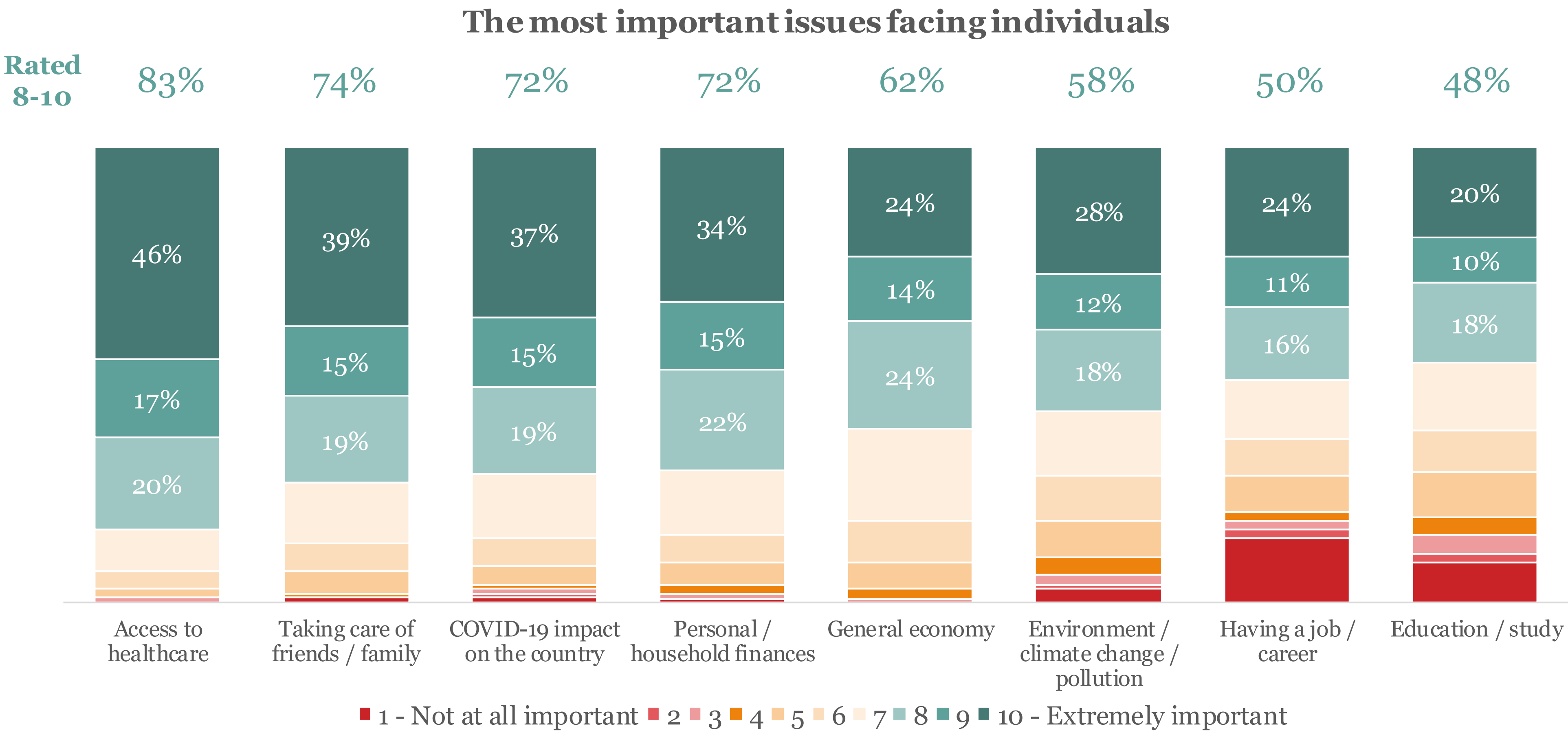
- Around half (**48%**) believe they are already doing as much as they can to save water. However, only one in five (**19%**) of this group re-use water from washing up or cooking at least most of the time and three fifths (**59%**) use a washing up bowl most or all of the time.

- In addition, only half of respondents report that they take environmentally-friendly actions such as using a washing up bowl (**43%**) or turning a tap off while brushing their teeth (**53%**) every time.

- Younger people and people in urban areas were more likely to flush a wipe down the toilet and one in eight (**13%**) women under 55 years of age report flushing a tampon most or every time.

Appendix

Healthcare, taking care of loved ones, the COVID-19 pandemic and personal finances were seen as the most important issues



When ranked by the proportion of respondents selecting eight or more out of ten for importance, 'access to healthcare' scores highest. Seven in ten also selected 'COVID-19 impact on the country', showing the heightened focus on health brought about by the pandemic. The need to 'take care of friends / family' completes the top three most important issues in the eyes of the public.

A high proportion of the public also rated economic and financial concerns as important to them. A significant majority selected at least eight out of ten for both their personal or household finances and the general economy. Consumers were more likely to see their personal finances as 'extremely' important (**34%**) than the general economy (**24%**).

Personal finances were particularly important for females (**76%** rating 8-10), 18-34 year olds (**76%**) and ethnic minority respondents (**77%**).

Q3. To what extent are the following important to you on a scale from 1 to 10 where 1 is not at all important and 10 is extremely important. Base: All respondents (n=2,623) and Ethnic minority respondents (n=600)

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