

April 2022

# Customer spotlight

People's views and  
experiences of water

A joint report from CCW and Ofwat

**ofwat**

**CCW**

The voice for water consumers  
Llais defnyddwyr dŵr

## Foreword

This is the first piece of research that we have developed together in a joint programme of work focused on customers.

The research establishes a benchmark of people's views across water and other utilities, and across a broad range of measures including affordability, satisfaction and engagement with and awareness of services, and environmental awareness and behaviours.

### The headline findings include:

- some households are struggling to pay bills;
- mixed awareness of water companies and what they do;
- a minority believe that companies act in the best interests of customers, the environment, and communities;
- low awareness of water saving as an environmental activity.

The research highlights several areas where water companies need to do more to reach out to customers and build relationships with them. As the regulator and the customer voice for water, we want people to have confidence – even though they may not have immediate concerns for their water companies to

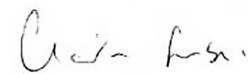
resolve – that their water company will be responsive to them should they need it. At the moment, not all customers trust companies to do this.

The cost of household bills is a key concern for many households. The current economic climate suggests that things are going to become harder for many households, and we found that many who are already struggling only expect things to get worse. This survey was conducted in late 2021, before the full extent of cost of living increases in spring 2022 were known. Some household bills are rising substantially and we know they will continue to rise. Some customers will not see a rise in their water bills this year, and for others the increase will be modest compared to other bills. But the overall increase in the cost of living means water companies must do all they can to reach out to their customers to make sure they are getting financial support to as many of those who need it as possible.

The findings from this research will support our activities. For Ofwat, this will inform our customer policy work, which is focused on affordability and vulnerability in relation to household customers. We are also considering the case for a new customer-focused licence condition to incentivise good customer service.

And for CCW this will provide insight to inform our campaign to End Water Poverty, connecting people and the water environment, and our 'Be in the Know' campaign. All of these areas have been identified as priorities for CCW to take forward on behalf of customers.

We plan to rerun this survey in the next few years to see how people's views have changed and will be monitoring progress between now and then.



**Dr Claire Forbes, Senior Director of Corporate Communications, Ofwat**

**Mike Keil, Director of Policy, Research and Campaigns, CCW**



# Introduction

This report provides an overview of what customers in England and Wales know, want and do in relation to the water sector and water usage. The data set out in this report allows us to better understand and monitor people's views and experiences. It is an important step towards improving services for water customers.

## The findings are taken from research commissioned jointly by CCW and Ofwat. This research includes:

- An online survey of 2,951 respondents in total, conducted by Savanta from 23 November to 14 December 2021.
- The sample includes 2,116 respondents in England and 507 respondents in Wales.
- The data was weighted to be nationally representative.
- A booster sample of 328 participants from ethnic minority communities in England and Wales.
- A telephone survey of 100 'digitally disenfranchised' respondents, conducted by Savanta between 4 and 18 October 2021. This was not a nationally representative sample. It was to capture the views of people who are less comfortable using online tools and would therefore be less represented in the online survey sample.

This is the first time CCW and Ofwat have conducted a comprehensive audit of people's knowledge, satisfaction, trust, priorities and behaviour. This data provides a benchmark for future years.

## We set out below key findings from this research, looking at:

- paying bills;
- understanding of the water sector;
- satisfaction;
- perceptions of companies and trust;
- priorities; and
- environmental behaviours.

A more detailed overview of the findings from this survey is included in a report by Savanta. Full data tables can be downloaded from Ofwat's website.

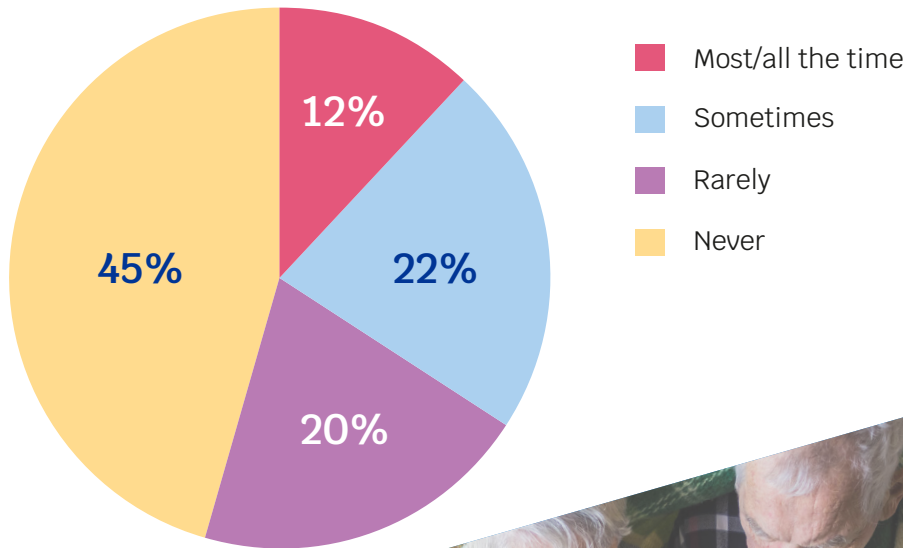


# Paying bills

The last few years have been challenging. The increase in cost of living means that this will continue to be a difficult time for many people financially.

Many people are struggling to pay bills. More than a third of household bill payers (34%) struggle to pay bills fairly frequently. 4% of customers struggle all of the time and 8% struggle most of the time.

## Customers told us that they struggle to pay bills...



Base: Bill payers (2,327).

Almost one in three people (28%) predict their financial situation will get worse over the coming year. This prediction is higher among those who are currently struggling – 57% of those who struggle ‘all of the time’ expect their financial situation will worsen, compared to 21% of people who never struggle.

Some people are relying on credit cards, overdrafts and borrowing money from friends and family to pay household bills. Many people who struggle ‘all of the time’ are in this position:

- More than half (55%) of this group have borrowed money from friends and family in the last year.
- 35% of this group have used credit cards to pay bills, with 30% using their overdraft.
- More than four in ten (41%) have put off paying bills.

A third of people are aware of water companies offering financial support for those struggling to pay bills. This rises to four in ten (39%) for those struggling to pay all or most of the time. About a third (34%) of people struggling to pay bills all of the time report receiving financial help from water companies over the last year. Overall, 4% of bill payers report receiving this type of help.



**55%** of those who struggle ‘all the time’ have borrowed money from friends and family

**28%** predict their financial situation will get worse over the coming year



**Only 4%** received financial help from water companies over the last year

# Understanding of the water sector

## Knowledge of how the water sector works is mixed:

- Most people (83%) report knowing who provides water to their home, but only 54% of people are certain that they know this.
- Seven in ten (70%) report knowing which company provides sewerage services to their home – although only 43% of people are certain of this.

However, fewer than four in ten (38%) know that they cannot change their water company if they are not happy with the service or cost. Only 24% of people are definite about this.

## Some customers have very little contact with their water company and do not engage with their bills:

- 44% have never contacted their company, and 19% have not contacted their company within the last three years.
- Almost three in ten bill payers (28%) report not paying much attention to their last bill. For example, they did not check to see how much it was or compare it to their previous bill.
- When asked about seeing or hearing from their water company via a wide range of channels, (including letter/leaflet, email, social media), more than four in ten (43%) cannot remember seeing or hearing from their water company at all over the last year.

**83%** of people know who provides water to their home



**38%** know that they cannot change their water company if they are not happy with the service or cost

**44%** have never contacted their company



**7/10** people say they know which company provides sewerage services to their home



**Almost 1/3** reported not paying much attention to their last bill

**43%** could not remember seeing or hearing from their water company at all over the last year



# Satisfaction

Just over 7 in 10 (71%) people would recommend their water provider to a family member or friend. This is in line with the proportion who would recommend their electricity provider (71%) and gas provider (72%). A higher proportion would recommend their broadband provider (76%). 17% would not recommend their water provider. This rises to 26% of people who struggle to pay bills all or most of the time.



**71%**  
Water



**72%**  
Gas



**76%**  
Broadband

People are more likely to report satisfaction with water services than with wastewater and drainage services. Two-thirds (65%) of people are satisfied with water services – giving a score of between 8-10 out of ten. The equivalent figure for wastewater and drainage services is 56%. Conversely, very few report being dissatisfied with these services (a score of 1-3 out of ten).

Bill payers are more satisfied with water services than non-bill payers (67% compared to 61%). Satisfaction is lower among those who pay bills indirectly, for example as part of rent (54%).

Base: All respondents online nat rep sample (2,623). For question on recommending a provider: All respondents excluding those people who answered 'not applicable' (2,186-2,565).



Just over

**7/10**

customers said they would recommend their water provider to a family member or friend

**2/3**

of people are satisfied with water services



## Perceptions of companies and trust

The research includes various measures on trust in, and perceptions of, companies. There is a mixed picture when people are asked whether water companies act in their customers' or communities' interests.

**40%** agree that companies provide a good service, scoring the company at least 8 out of 10



**29%** agree that water companies offer good value for money

**27%** agree that companies act in the interests of customers...

...**11%** disagree



**27%** agree that companies act in the interests of the environment...

...**10%** disagree

**34%** trust that their water company would fix a problem quickly



**31%** agree that companies will keep them informed about service choices that could help them



**29%** agree companies act in the interest of local area/community...



...**9%** disagree

Base: All respondents online nat rep sample (2,623).

## How customers prioritise water company activities

Rated 10 out of 10

### 1. Providing clean, safe drinking water

64%

### 2. Keeping sewage out of homes

58%

### 3. Keeping sewage out of rivers

54%

### 4. Fix leaks

48%

### 5. No water shortages

45%

### 6. Services meet future needs

43%

### 7. Keep bills low

37%

### 8. Provide good customer service

37%

### 9. Less water taken from environment

36%

### 10. Reduce carbon footprint

34%

Base: All respondents online nat rep sample (2,623).

Note: The wording of some priorities have been shortened.

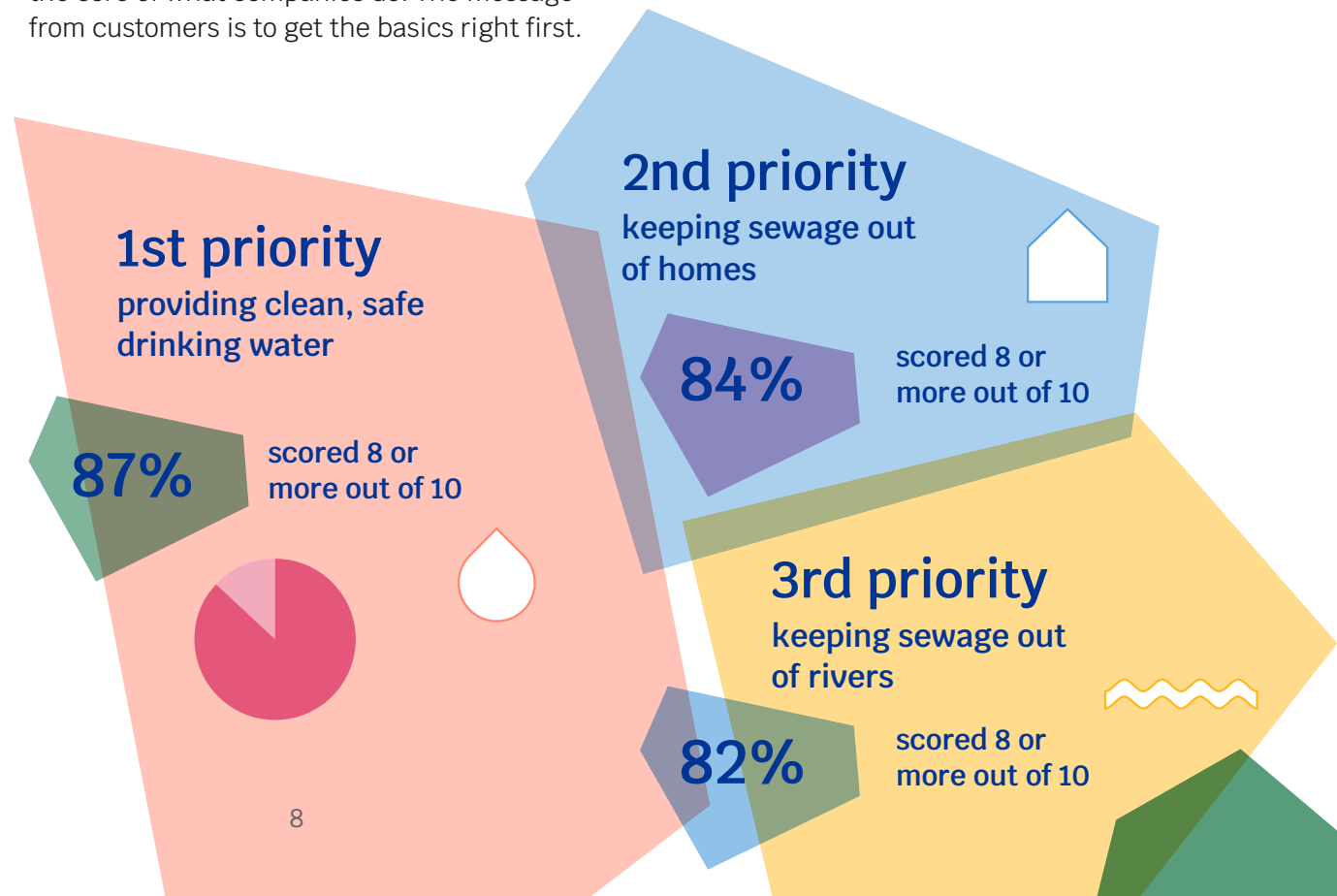
Please see Savanta report for full wording of response options.

## Priorities

A range of water company activities are seen as important. For each of the activities included in the research, a majority of people believe them to be very important for companies over the next 10-20 years.

People score providing clean, safe drinking water as the top priority. 87% of people give this a score of between 8-10 out of 10. For two thirds (64%), it scored 10 out of 10 for importance. It's the core of what companies do. The message from customers is to get the basics right first.

The next two priorities are keeping sewage out of homes and out of rivers. They score 10 out of 10 for importance by 58% and 54% respectively. Keeping bills low scores 10 out of 10 for 37% of people – with differences by financial circumstances. 55% of those who struggle to pay bills all of the time rate this 10 out of 10 in importance. This rises to 63% of people who expect their financial situation to get a lot worse over the coming year.





# Environmental behaviours

Many customers claim they are saving water or not doing behaviours that cause harm to the environment.

## Activities in the home

**3%** flush a cotton bud down the toilet most or every time they use one...

...compared to **13%** of women under 55 who flush tampons down the toilet most or every time

**8%** of people flush a wipe down the toilet most or every time

Breakdown by age

18-34	12%
35-54	8%
55+	5%



**72%** of people always or mostly turn off the tap when brushing their teeth

**54%** always or mostly use a bowl when washing up

**84%** rarely or never pour cooking oil down the kitchen sink



A further **8%** of people do this sometimes

## Activities outside



**8%** use a pressure or jet washer at least every few months

**28%** of people with a garden use a hosepipe monthly, or more often during the summer months



**13%** wash their car with a hose at least every few months, but people are more likely to use a bucket to wash their car than a hose

**48%** of people feel they are already doing as much as they can to save water in the home



This view can make it hard to encourage more water saving behaviours. Three in ten (30%) of this group never or rarely use a bowl when washing up.

People do not tend to see reducing water use in the home or garden as a priority activity for achieving net zero or preventing climate change. Only 9% of those familiar with the term net zero ranked using less water in the home and garden as a priority – compared to, for example, 65% who ranked recycling more as a top priority.

Base: All respondents online nat rep sample (2,623).  
All respondents with a garden online nat rep sample (2,293).  
Respondents who have heard of the term Net Zero (1,226).

## Conclusions

The findings of this report present a comprehensive overview of what customers know, want and do in relation to water.

It shows that some people have a low awareness of the sector and engage rarely or never with companies.

Low engagement can be a sign of customers being satisfied with the service they receive- meaning there is no need to contact companies. Indeed, although customers cannot choose their water company, people are as likely to recommend their company to family or friends as they are their gas and electricity providers.

However, low engagement is also a cause for concern. It may mean that customers in need of financial or priority services support are not aware that support is available for them. Engagement with customers is also needed for customers to do more to save water, and do less of the behaviours that can cause harm to the environment.

Many customers are keen to do more to save water, and recognise the role individuals can play in this. They also want companies to remain focused on the core of what they do – providing clean, safe drinking water, and preventing sewage from entering homes and rivers.

We will continue to collect this data, to see whether and how people's knowledge, actions and priorities change over time.



**CCW is the independent voice for water consumers in England and Wales. We help thousands of people resolve complaints against their water company, while providing free advice and support.**

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