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The voice for water consumers
Llais defnyddwyr dŵr

Water Matters

Household customers' views on their
water & sewerage services 2021

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CCW: Water Matters 2021 – Foreword

This is the eleventh year of Water Matters, our annual survey tracking people's views and perceptions of water companies' performance and services. Over this time, there have been positive trends in several key metrics, including satisfaction with value for money and perceptions of affordability. However, the latest results reflect people's changing financial and personal circumstances and shows more negative views since last year's data.

Although general levels of satisfaction remain strong, the number of people who say that their bills are affordable has reduced from 82% to 76% and around one in ten now say their bills are unaffordable. There have also been significant drops in many individual aspects of water and sewerage services, such as satisfaction with pressure, minimising sewer flooding, and cleaning up wastewater before returning it to the environment.

Declining satisfaction could be because companies are not reacting to customer needs quickly enough. However, we have highlighted in the past¹ how satisfaction with a service doesn't necessarily reflect a company's actual performance in that area. People's views often reflect wider pressures they are under and companies need to consider this in the way they engage with their customers. An important part of this is providing clear, empathetic and effective communications to customers.

We know that there is a lot more that companies can do on communications. This year's Water Matters data shows only 50% of people in England and 53% in Wales feel that companies communicate well about their services, plans and the availability of extra help. It is vital for companies to get their communications right, given the current climate and the fact that more people and saying their bills are unaffordable.

There is some good news. We were pleased to see that more people say that they have reached out to their company, when they have a query or concern, suggesting that more customers are prepared to engage with companies about issues that matter to them. There have also been significant increases in awareness of WaterSure and WaterSure Wales², which are the tariffs that cap the bills of vulnerable people in certain circumstances.

We want to see these positive scores grow further and we will be working with companies to help them improve the way they engage with their customers as part of our campaigns, to end water poverty, to end sewer flooding misery and to improve services to the worst served customers. We will also draw on the Water Matters data when we work with companies to help them improve their communications about their environmental work.

We have explained how Water Matters data underpins our campaigns in this year's Highlights report [to add link on publication]. Companies need to make the most of every opportunity to communicate clearly, proactively reaching out to those that need help, and, in time, this should help to increase their customers' satisfaction.

¹ [Under pressure: the gap between performance and expectations](#)

² Previously known as Welsh Water Assist.

Executive Summary

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

Overview of methodology:

- This year's survey consisted of 5,410 telephone interviews with household water bill payers.
- Fieldwork was undertaken between 4th October 2021 and 24th March 2022.
- A minimum of 200 interviews were carried out with each Water & Sewerage Company (WaSC) and 150 with each Water only Company (WoC).
- All companies were given the opportunity to boost their sample. In 2021, 6 WaSCs and 1 WoC opted for this and their sample size is larger as a result³.

There are few notable amendments to the number of interviews conducted this wave, driven by changes in ownerships for some WoCs:

- South West Water requested that we report on their customers and Bournemouth customers as one entity.
- Due to the re-branding of Hartlepool Water to Anglian Water, the same approach was taken with this company.
- The number of interviews achieved within each company overall were proportionate to the number of connections for each of the two areas that made up each company
- Bournemouth Water customers accounted for 20% of the interviews for South West Water (n=80) and South West Water accounted for 80% (n=320).
- Hartlepool customers accounted for 3% of the interviews within the Anglian total (n=10) and Anglian Water for 97% (n=341).

Customers' views are described for England and Wales; for England and Wales separately; for the 11 companies that supply water and sewerage services and the 10 companies that supply just water; and by each water company⁴. This includes eleven-year trend analysis⁵ to determine the direction of travel – upward trend, flat or downward trend – for each measure.

Key Findings

Satisfaction with water and sewerage services

Satisfaction with water services has remained very high in 2021, however satisfaction with individual aspects has decreased significantly.

- In 2021, 91% of customers in England and Wales are satisfied with their water supply; satisfaction has been consistent over the last eleven years (Figure 1)⁶.
- Overall satisfaction with water supply is higher in Wales compared to England in 2021 (93% vs. 91% for water respectively). This difference is not significant.

³ Companies are given the opportunity to boost their sample size, as the larger the sample size, the smaller the confidence interval/margin of error (i.e. the surer a company can be that the data truly reflects the opinions of their customers). However, if companies choose to boost, this means that the number of interviews in their area will be out of proportion to their overall size within the population. Since data is weighted, based on total household water connections, the final samples are still representative at national levels.

⁴ The views of customers of specific water companies are in the data report which follows.

⁵ Trends are analysed over the last eleven years from 2011. Some shorter trends exist (6 years, 8 years). Trend analysis is only conducted when data exists for all the previous years when the question format, routing & text has remained the same over each period.

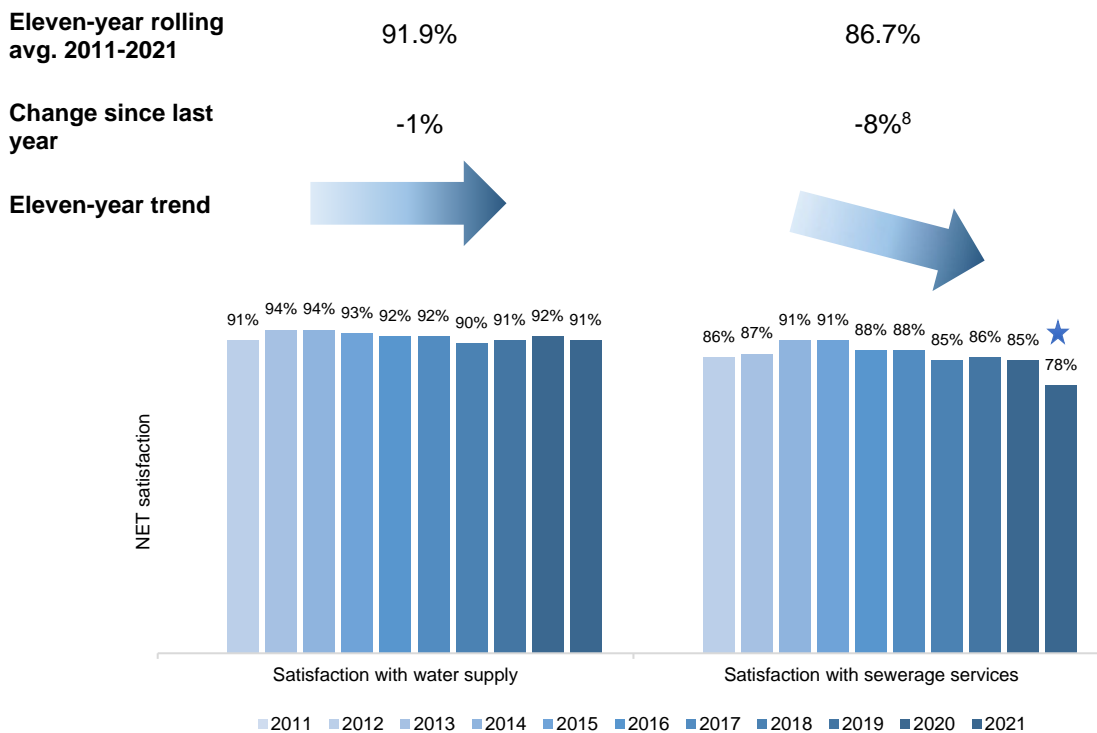
⁶ Only 10 individual years of trend analysis is shown on each chart.

- Satisfaction levels for different aspects of water supply service range from 96%-85%, apart from 'hardness/softness' of water which is consistently lower (63% satisfied in 2021). Satisfaction with all aspects of water supply has decreased significantly for all attributes since 2020.

Satisfaction with sewerage services has decreased significantly in 2021.

- In 2021, 78% of customers in England and Wales are satisfied with their sewerage services. Satisfaction has decreased significantly since 2020 (Figure 1). The eleven-year trend for overall satisfaction with sewerage services is downward (previously flat).
- Satisfaction with different elements of sewerage services ranges from 74%-55% (maintaining sewers and drains, reducing smells, cleaning wastewater and minimising sewer flooding). Eleven-year trends for satisfaction with aspects of sewerage services are flat for reducing smells from sewage treatment works and maintenance of sewerage pipes & treatment works, but show a downward satisfaction trend for minimising sewer flooding and cleaning waste water properly before releasing it back into the environment.

Figure 1. Overall satisfaction with water and sewerage services⁷



★ Significant difference between 2020 and 2021 data.

⁷ The rolling eleven-year averages are calculated based on the total valid base of weighted data at each time point. The eleven-year trends are assessed using the Mann-Kendall method (Mann 1945, Kendall 1975). The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data.

⁸ Graph figures are rounded to the nearest 1%, whereas the year-on-year change figure is calculated to the exact percent figure – e.g. 2020 = 85.2646158607483% and 2021 = 77.5291239237991%; therefore the percentage change is -7.7354919369492% which is then rounded to 8%.

Care and trust

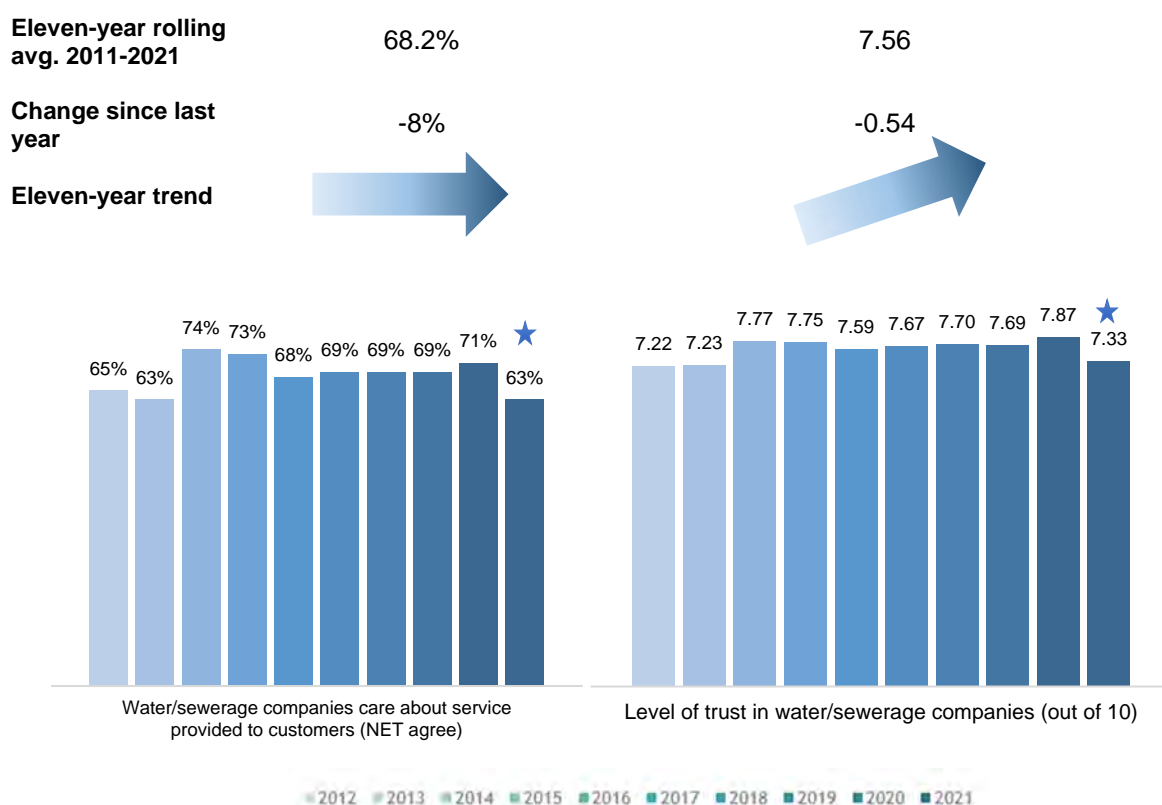
Just over six in ten customers believe that water companies care about the services they provide; a significant decrease since 2020.

- 63% of customers across England and Wales agree that their water company cares about the services they provide, which is significantly lower than in 2020 (71%). The overall eleven-year trend for England and Wales remains flat (Figure 2).
- Customers in Wales are significantly more likely (73%) than those in England (63%) to agree that their company cares. In 2021, there has been a significant decrease for customers in England (63% 2021 vs 70% 2020) and Wales agreeing that their company cares (73% 2021 vs. 81% 2020).

Customers' trust in water companies has decreased significantly since 2020.

- Trust in water companies has increased over the last eleven years, however the mean score in 2021 is the same as in 2011 at 7.33⁹ (Figure 2), the lowest score since 2014.
- Despite this, Trust shows an improving trend in both England and Wales, although significant decreases are evident from 2020 to 2021 (Figure 2).
- Trust is significantly higher in Wales than in England (7.76 vs. 7.30 respectively).

Figure 2: Care and trust in water/sewerage companies



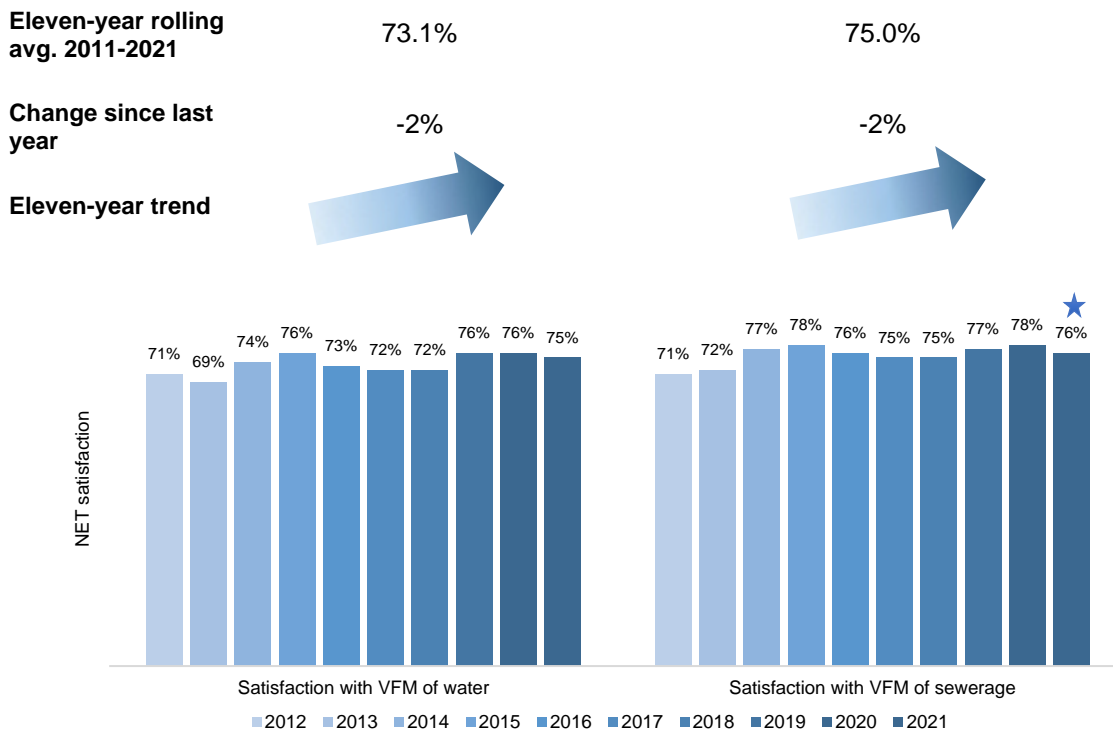
⁹ Question is rated on a scale from 1 to 10, where 1 is 'do not trust them at all' to 10 'completely trust them'. The figure reported here is an average of all trust scores.

Value for money

Satisfaction with value for money of water remains unchanged for 2021, however satisfaction with sewerage services has decreased significantly.

- 75% of customers in England and Wales are satisfied with the value for money of their water services. The eleven-year trend is an upward one (Figure 3).
- 76% of customers in England and Wales are satisfied with the value for money of their sewerage services but this decreased significantly since 2020 (78%). The eleven-year trend is an upward one (Figure 3).

Figure 3: Satisfaction with value for money of water and sewerage services

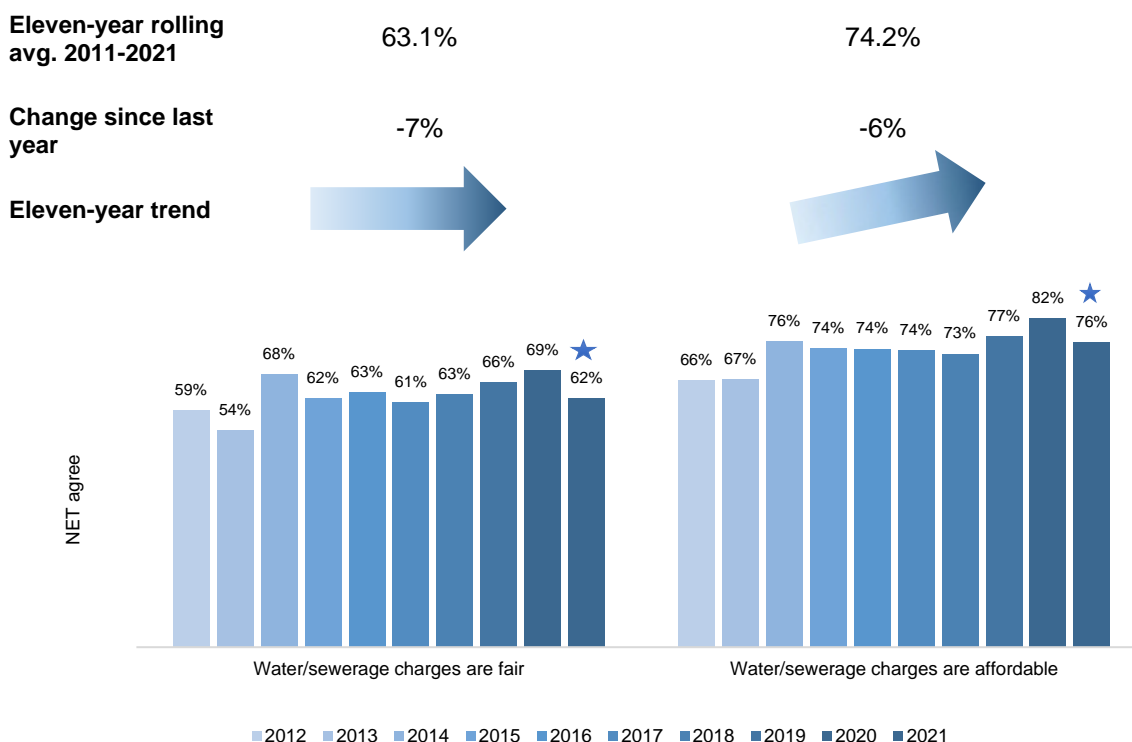


Fairness and affordability of charges

Perceptions of fairness and affordability of charges for water/sewerage have worsened in 2021.

- In 2021, 62% of customers in England and Wales agree that the charges they pay are fair, a significant decrease since 2020 (69%).
- More customers agree that their charges are affordable than fair, 76% in England and Wales in 2021 (Figure 4), a significant decrease since 2020 (82%).

Figure 4: Fairness and affordability of water/sewerage charges



★ Significant difference between 2020 and 2021 data.

Change in financial situation over the last year

Over one third of customers say their financial situation had got worse since last year.

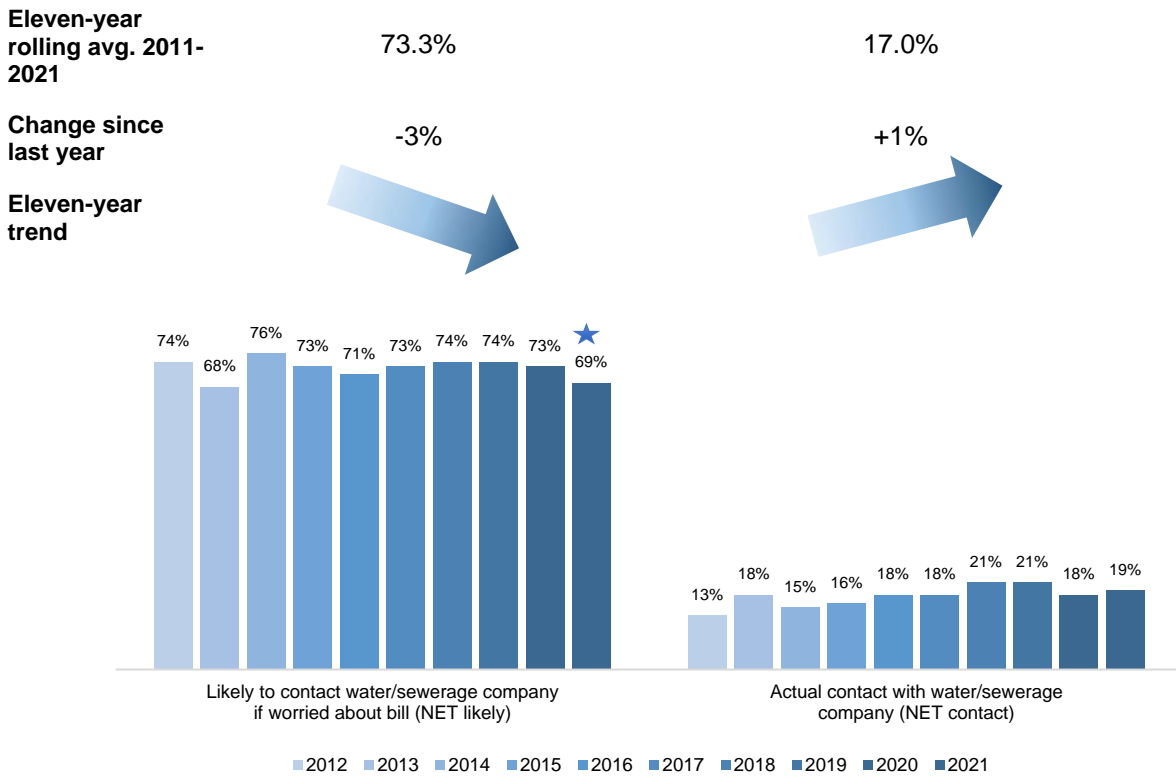
- In 2021, 58% say their household finances were unchanged over the last year, a significant decrease from 2020 (63%). Over one third say they had got worse (34%) and the remaining 9% said they had got better.
- More customers in Wales say their financial situation had got worse over the last year (36% compared with 34% in England).

Contact with water companies

The eleven-year trend for likelihood to contact your water company if worried about the bill is a downward trend, though actual contact is an upward trend over the same period.

- Almost seven in ten customers (69%) in England and Wales would be likely to contact their supplier if they had a problem with their bill (Figure 5). However, over the last ten years, likelihood to contact has fallen significantly from 82% in 2011.
- Fewer than one in five customers (19%) in England and Wales contacted their water/sewerage company in 2021. The main reason for contact was a billing enquiry.
- In 2021, 78% of customers in England and Wales who contacted their water/sewerage company in the last year are satisfied with how it went overall. Satisfaction with specific aspects of contact handling ranges from 84% to 71% (including ease of contact, quality of information, knowledge/ professionalism, resolution and kept informed).

Figure 5: Likelihood to contact if worried about bill and level of actual contact with water/sewerage company



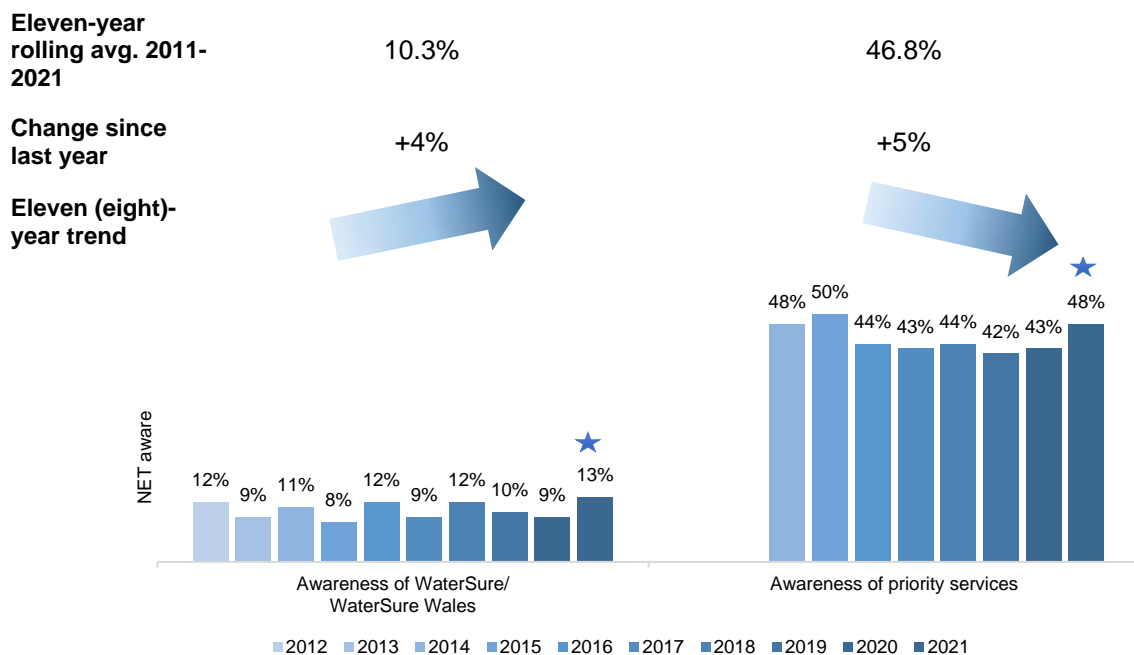
★ Significant difference between 2020 and 2021 data.

Awareness of WaterSure support tariff¹⁰ and Priority Services

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

- Awareness of the WaterSure tariff has increased significantly to 13% in England and Wales.
- 48% of customers in England and Wales are aware of Priority Services. This has increased significantly since 2020 (43%), however the eight-year trend shows a downward trend overall.
- Over one third (37%) are aware that their water company offers reduced bills to some households, whose sometimes struggle to pay their bills because of their financial circumstances.

Figure 6: Awareness of WaterSure and Priority Services¹¹



★ Significant difference between 2020 and 2021 data.

Communication about services, plans and additional services

When asked how well their water/water and sewerage company communicates with them about its services and plans and the availability of support such as WaterSure and Priority or additional services, half say they are good.

- Across England and Wales, 50% of customers say that the communications from their companies are good, significantly lower than in 2020 (54%). 26% of these say the main reason for having this view is that information comes with their bill.
- On the other hand, 23% of customers say that the communications are poor and 32% say this is because they don't recall any communication/correspondence apart from their bill.

¹⁰ WaterSure is a system set up to provide a reduction in charges for customers on a low income and whose water is supplied by a meter.

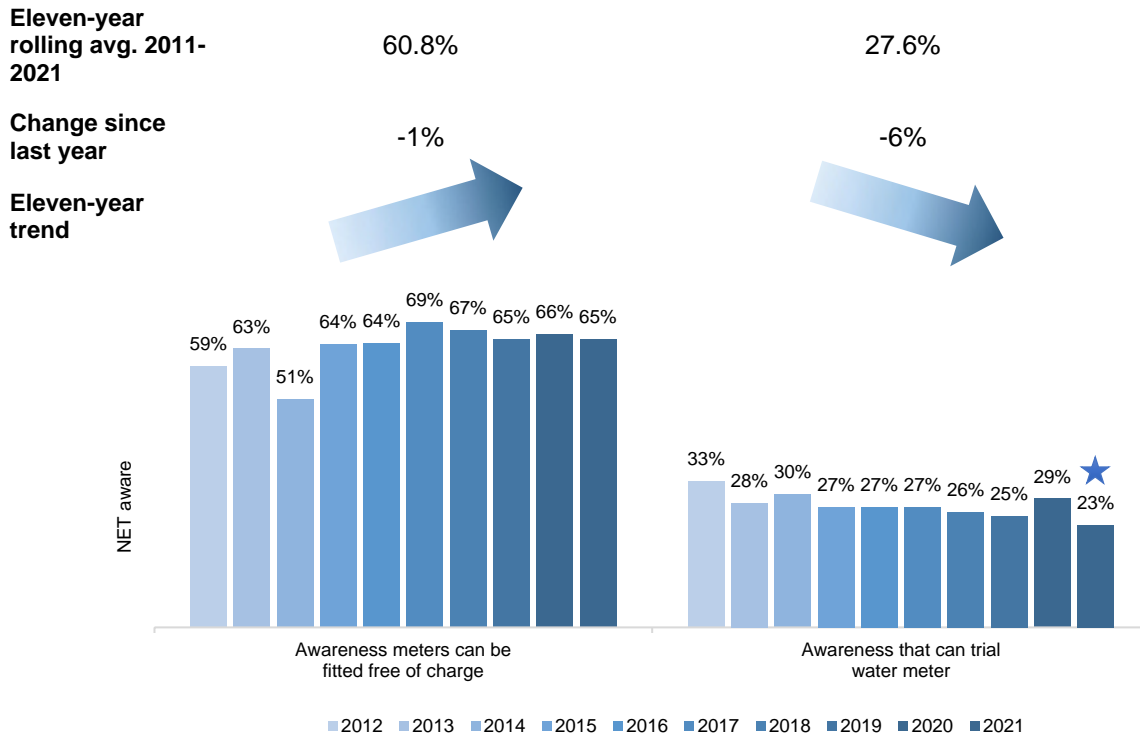
¹¹ The trend for awareness of priority services is measured over seven years, from 2014 due to a change in question wording.

Water meters

Awareness of the free meter scheme has increased since 2011; however, only a minority of customers are aware that a meter can be fitted on a trial basis.¹²

- Two-thirds of unmetered customers in England and Wales are aware of the free meter scheme (65%), a slight decrease since 2020; the eleven-year trend shows increasing awareness of the free meter scheme (Figure 7).
- However, only 23% of customers in England and Wales are aware of the 24-month trial period, a significant decrease since 2020 (29%).

Figure 7: Awareness meters can be fitted for free and can be trialed



★ Significant difference between 2020 and 2021 data.

¹² Awareness is measured only in water company areas where the free meter trial scheme has not been discontinued due to universal metering programmes, and only amongst customers from households that do not already have a water meter.

Satisfaction with customer services/overall experience

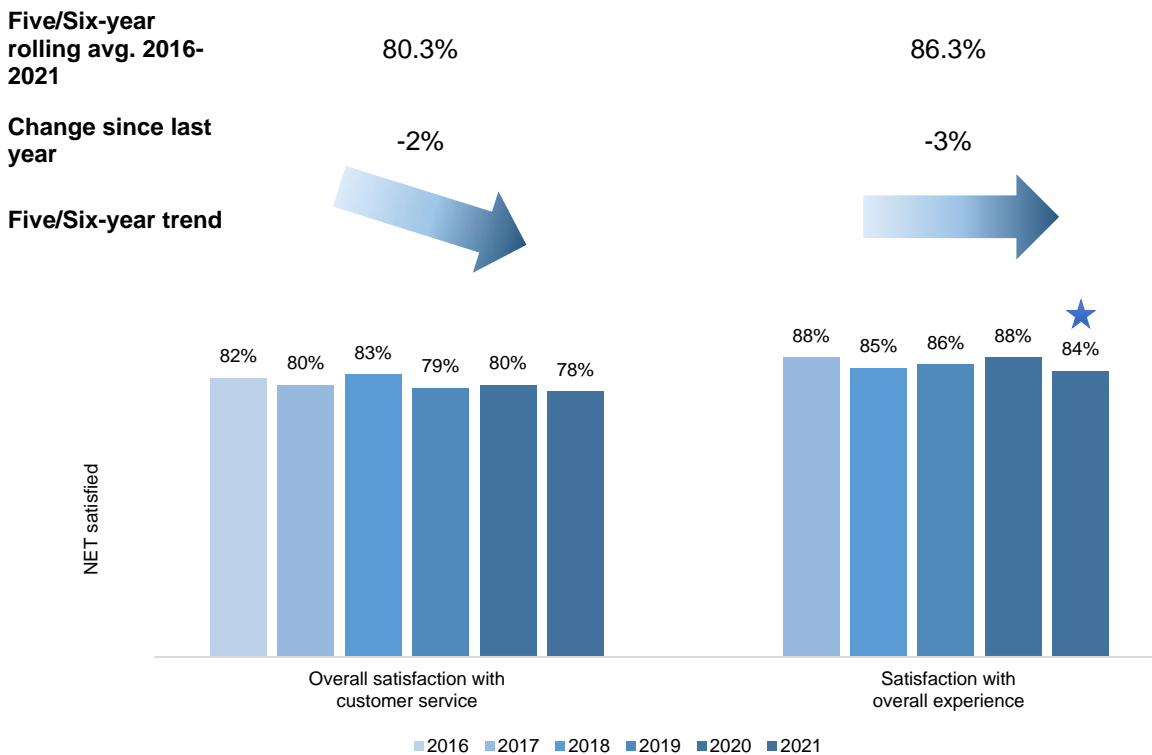
Overall satisfaction with customer services has fallen over the last six years.

- When asked to consider customer services more generally, including the frequency and content of bills, meter readings and payment options, 78% of customers in England and Wales are satisfied, a slight decrease since 2020 (80%).
- The main reason for dissatisfaction continues to be the lack of communication/information.

The trend for satisfaction with overall experience remains static since the question was introduced, but there have been drops in performance in 2021.

- When asked to think about their overall experience of water and/or sewerage service, including the provision of services, as well as charges, customer services and billing, 84% of customers in England and Wales are satisfied, a significant decrease since 2020 (88%), the lowest proportion since the question was introduced.

Figure 8: Satisfaction with customer services/overall experience



★ Significant difference between 2020 and 2021 data.

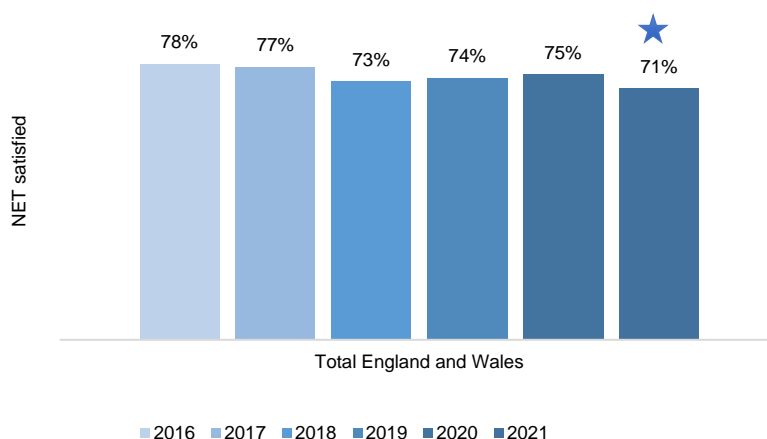
Views on the longer term availability and accessibility of water

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

- Seven in ten customers in England and Wales are confident that in the longer term their water supply will be available without restriction, that is, not subject to hosepipe bans or other restrictions on use (71%), a significant decrease since 2020 (75%). (Figure 9).
- Of customers who are confident that the water supply will be available, over one quarter say this is because they have never had a problem with water shortages (27%), while one in six mentioned that they have never had a hosepipe ban before (18%).
- Customers who are not confident that the water supply will be available say this is because they have already experienced or thought they would experience restrictions (36%), or there will be less water in the future due to climate change (31%).

Figure 9: Confident water will be available

Six-year rolling avg. 2016-2021 74.6%
Change since last year -4%
Six-year trend



★ Significant difference between 2020 and 2021 data.

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

Just under two-fifths of customers are promoters, i.e. very likely to recommend their water/sewerage company in 2021.

- Customers were asked hypothetically how likely they would be to recommend their water/water and sewerage company to friends or family. Just under four in ten (37%) are very likely to recommend their supplier (scores of 9 or 10), a significant decrease since 2020 (45%).
- The industry NPS¹³ is +11, with customers in Wales significantly more likely to score 9 or 10 and be classed as 'promoters' (a net promoter score of +40 compared to +10 in England).
- Scores range from -19 to +40 across WaSCs and from -15 to +20 across WoCs. Six companies score a negative NPS (Southern, Thames, Affinity Central, Affinity East, Affinity South East and South East).

Table 1: NPS by company

WaSC	NPS Score	WoC	NPS Score
Anglian	20	Affinity Central	-12
Dŵr Cymru	40	Affinity East	-3
Hafren Dyfrdwy	32	Affinity South East	-5
Northumbrian	30	Bristol	16
Severn Trent	21	Cambridge	9
South West	7	Essex & Suffolk	3
Southern	-19	Portsmouth	11
Thames	-9	South East	-15
United Utilities	18	South Staffs	20
Wessex	16	SES	2
Yorkshire	26		

Environmental behaviours

New questions have been added this year to find out the effort consumers put into engaging with environmental issues. Consumers were asked which of the following activities they put *most* effort into (top priority and then second):

- Recycling at home
- Reducing carbon footprint
- Saving energy at home
- Saving water at home

Consumers prioritised putting effort into recycling at home (63% first, 16% second), followed by saving energy at home (17% first, 40% second). Two fifths of consumers say they put effort into water saving at home (11% first, 29% second). Effort reducing their carbon footprint was least prioritised (9% first, 15% second).

When asked the behaviour receiving the *least* effort, reducing their carbon footprint was least engaged with (64%). Less than one fifth say they put least effort into saving water (17%) or saving energy (14%). Recycling at home was mentioned by only 5%.

¹³ Those giving scores of 0 to 6 are classified as Detractors, 7 to 8 Passives and 9 to 10 as Promoters. An overall Net Promoter Score (NPS) is arrived at by subtracting the proportion of Detractors from the proportion of Promoters.

Key differences in views between customers in England and Wales

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

Table 2: England and Wales significant differences in 2021

Key measures	England		Wales	
	%/n	10-year trend	%/n	10-year trend
Care about services provided	63%	↔	73%	↑
Level of trust	7.30	↑	7.76	↑
Satisfaction with value for money of sewerage services	75%	↑	83%	↑
Aware meters can be fitted free of charge	65%	↑	72%	↑
Overall satisfaction with sewerage services	77%	↓	86%	↔
Confidence in longer term water supply ¹⁴	71%	↓	81%	↔
Overall experience of water/sewerage company ¹⁵	84%	↔	91%	↔

- There are also significant differences between most individual attributes about water and sewerage:
 - Colour and appearance
 - Safety of drinking water
 - Water pressure
 - Taste and smell
 - Hardness/softness
 - Reducing smells from sewage treatment works
 - Maintenance of sewerage pipes
 - Cleaning waste water
 - Minimising sewer flooding

¹⁴ Six-year trend.

¹⁵ Five-year trend.

Methodology

Telephone research was conducted with a random sample of households across England and Wales. Respondents were responsible, either solely or jointly, for paying their household's water bill. Quota controls were set according to the 2011 Census but adjusted based on the bill payer profile found in the online survey conducted by DJS Research in 2014.

Fieldwork took place between 4th October 2021 and 24th March 2022. This included a pilot survey of 50 customers to review interview length and routing. A total of 5,410 interviews took place which were an average of 19 minutes and 36 seconds long.

For inclusivity, customers without landlines (i.e. customers who describe themselves as not having a landline or only using their landline for broadband purposes) continue to be represented in the research, with 1,927 interviews achieved in 2021.

At company level, CCW commissioned 200 interviews for each of the 11 WaSCs, and 150 for the 10 WoCs which equates to 4,000 interviews (4,009 were achieved). As in previous years, each water company was given the opportunity to boost interview numbers and seven companies did so:

- Anglian Water (150 additional interviews)
- Bristol Water (150 additional interviews)
- Dŵr Cymru Welsh Water (200 additional interviews)
- South West (200 additional interviews)
- Southern Water (200 additional interviews)
- United Utilities (500 additional interviews)
- Yorkshire Water (300 additional interviews)

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

As a result of the large sample size for England and Wales we can be 95% confident that the sample result reflects the actual population result to within the margin of error shown in Table 3.

There are few notable amendments to the number of interviews conducted this wave, driven by changes in ownerships for some WoCs:

- South West Water requested that we report on their customers and Bournemouth customers as one entity.
- Due to the re-branding of Hartlepool Water to Anglian Water, the same approach was taken with this company.
- The number of interviews achieved within each company overall were proportionate to the number of connections for each of the two areas that made up each company
- Bournemouth Water customers accounted for 20% of the interviews for South West Water (n=80) and South West Water accounted for 80% (n=320).
- Hartlepool customers accounted for 3% of the interviews within the Anglian total (n=10) and Anglian Water for 97% (n=341).

The questionnaire is similar to those used in previous years, although it omits a few questions asked in previous surveys and includes a small number of new questions. This ensures that the

survey addresses emerging issues as well as ongoing ones that may be of interest to water customers.

The findings for each WaSC and WoC are reported here on a question-by-question basis; they are also published on CCW's website¹⁶ on a company-by-company basis.

Analysis

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

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

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

Table 3: Statistical reliability

	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	5,410	0.80	1.22	1.33
England	4,810	0.85	1.29	1.41
Wales	600	2.40	3.67	4.00
Company sample sizes	700	2.22	3.39	3.70
	500	2.63	4.02	4.38
	400	2.94	4.49	4.90
	350	3.14	4.80	5.24
	300	3.39	5.19	5.66
	200	4.16	6.35	6.93
	150	4.80	7.33	8.00
Metered households	3,117	1.05	1.61	1.75
Unmetered households	2,205	1.25	1.91	2.08
Sample size 150: Affinity Water Central, Affinity Water East, Affinity Water South East, Cambridge Water, Essex & Suffolk Water, Portsmouth Water, South East Water, South Staffs Water, SES Water				
Sample size 200: Hafren Dyfrdwy, Northumbrian Water, Severn Trent, Thames Water, Wessex Water				
Sample size 300: Bristol Water				
Sample size 350: Anglian Water				
Sample size 400: Dŵr Cymru (Welsh Water), South West Water, Southern Water				
Sample size 500: Yorkshire Water				
Sample size 700: , United Utilities				

Significant differences between England and Wales, and 2021 cf. 2020 data are highlighted on national charts with a star.

¹⁶ <https://www.ccwater.org.uk/households/company-performance/>

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

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

The SEC classifications used are:

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

Water Matters has been a company level survey for eleven years, and to get full value from this data, trend analysis has been conducted across eleven years. Where 'don't know' responses are excluded from reported percentages, the rolling eleven-year averages are calculated using the total valid base (which excludes 'don't know' responses or respondents who refused to answer) of weighted data at each time point to properly account for the changes in proportions of respondents answering each question. Where questions are reported with 'don't know' responses (e.g. awareness questions) the rolling eleven-year averages are based on the total sample size for the industry, nation or company as appropriate. Due to limited space on individual company charts, the decision has been taken to only show ten years of individual figures, however 2011 has not been removed from any trend calculations.

For consistency in approach to trend analysis between 2011 and 2021, the eleven-year trends are analysed using the Mann-Kendall method (Mann 1945¹⁷, Kendall 1975¹⁸). This statistical technique identifies significant upward or downward trends in the reported proportions for each of the key measures. The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data. The raw data is transformed using the arcsine square root transformation to prevent forecasts from passing the lower (0%) or upper (100%) bounds. The smoothing process then produces a weighted average of the year in question and all years preceding (using a conservative smoothing parameter, $\alpha=0.5$) to smooth any spikes or troughs in the reported proportions. The smoothed data determines whether a longer-term increasing or decreasing trend exists (indicated by trend arrows on the charts) which is determined by using a Mann-Kendall test (Gilbert 1987¹⁹). Eleven-year trend analyses are only conducted when data exists for all of the previous ten years and when the question format, routing and text has remained the same over this entire period.

¹⁷Mann, H.B. 1945. Non-parametric tests against trend, *Econometrica* 13:163-171.

¹⁸Kendall, M.G. 1975. *Rank Correlation Methods*, 4th edition, Charles Griffin, London.

¹⁹Gilbert, Richard O. *Statistical Methods for Environmental Pollution Monitoring*. United States: N. p., 1987

Changes in 2021

Questions about environmental behaviours have been included for the first time this year.

Questions removed this year:

- Comparisons with other utility providers (Trust, Care).
- Whether customers can pick up water from a local distribution centre, and in what circumstances help might be needed to do this.
- Previously we asked if customers were aware of schemes offered by their water company which provide lower charges for customers who struggle to afford their bills, and to name these. We have changed this to now simply ask if customers are aware these sorts of schemes are provided.

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

Due to rounding, summed percentages may be $\pm 1\%$ different from summing individual proportions. For example, in Figure 1, the year-on-year difference for Total England and Wales is shown as 8%. Actual figures are 85.27% in 2020 (shown as 85%) and 77.53% in 2021 (shown as 78%). Although the difference could be shown as 7%, it is actually 7.74% and shown as an 8% change.

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

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

The base sample sizes reported in the WaSC and WoC analysis tables include 'don't know' responses consistent with the layout of previous Water Matters reports. The actual base sizes for each question will vary slightly from these as they exclude 'don't know' answers; in nearly all cases the numbers of 'don't know' responses excluded is so small that there is no difference from the margin of error for the full sample size. Open response questions display coded responses where they are greater than 5% only and are based on all responses.

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

- \uparrow in green indicates a significant upward eleven-year trend, or where the eleven-year average for a specific company is significantly higher than the eleven-year average for aggregate WaSCs or WoCs, or where there has been a significant increase since 2020.
- \downarrow in red indicates a significant downward eleven-year trend, or where the eleven-year average for a company is significantly lower than the aggregate for all WaSCs or WoCs, or where there has been a significant fall since 2020.
- \leftrightarrow in black indicates a flat trend where there is no significant change over eleven years, or no difference in the eleven-year company average to the aggregate average for all WaSCs or WoCs, or no significant difference between 2020 and 2021 findings.

Chapter 1: Care and trust

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

1.1 Care about service provision

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

Figure 10: Care about service provision

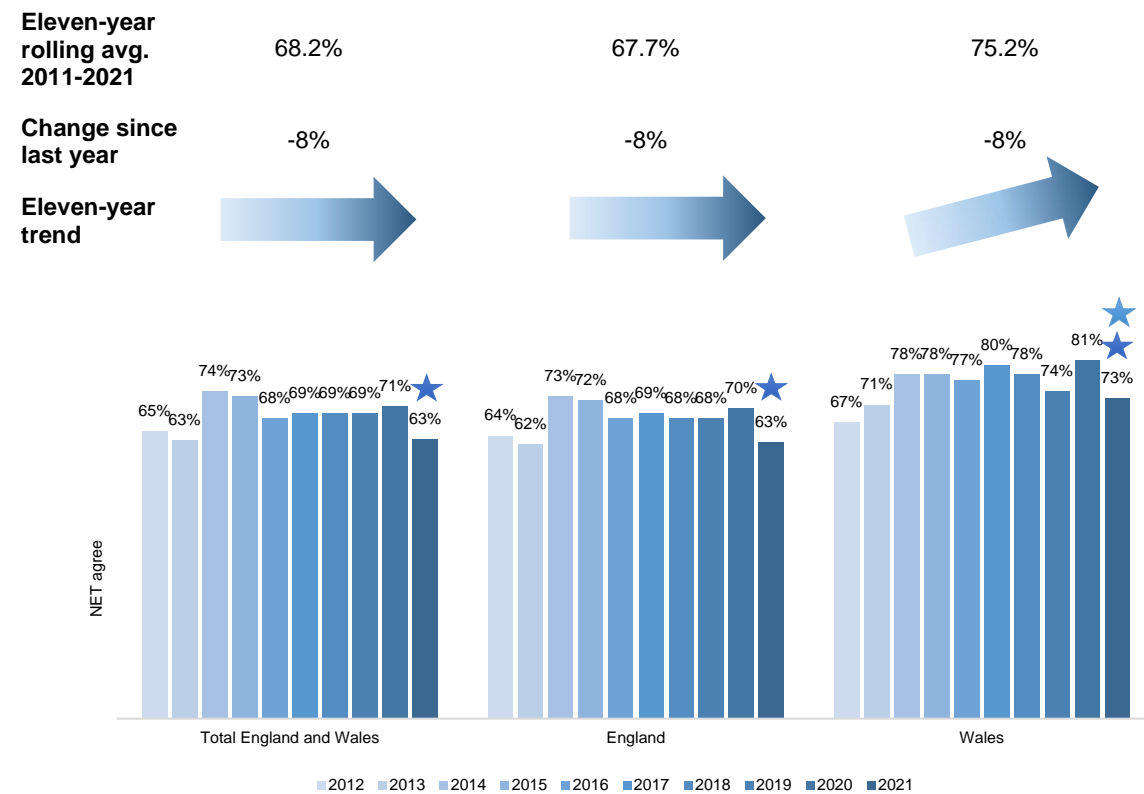


Table 4: Care about service provision – WaSCs

Water companies care about service provided to customers	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	68.2%	<p>65% 63% 74% 73% 68% 69% 69% 69% 71% 63%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	n/a	-8%
Total WaSCs (2021 base sample: 3753)	68.6%	<p>65% 63% 74% 73% 70% 69% 69% 69% 71% 64%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	64%	-8%
Anglian Water (2021 base sample: 351)	69.3%	<p>67% 59% 75% 77% 68% 73% 69% 69% 71% 69%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%
Dŵr Cymru Welsh Water (2021 base sample: 400)	75.1%	<p>67% 71% 78% 78% 76% 79% 79% 75% 81% 72%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↑	-9%
Hafren Dyfrdwy (2021 base sample: 200)	72.7%	<p>72% 69% 75% 75%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	+1%
Northumbrian Water (2021 base sample: 200)	74.5%	<p>70% 72% 78% 77% 79% 73% 75% 71% 76% 73%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	-3%
Severn Trent (2021 base sample: 200)	70.4%	<p>61% 65% 75% 72% 74% 69% 72% 74% 76% 66%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-10%
South West Water (2021 base sample: 400)	63.5%	<p>57% 61% 67% 66% 66% 62% 62% 62% 71% 63%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-8%
Southern Water (2021 base sample: 401)	62.1%	<p>69% 58% 68% 68% 67% 61% 62% 62% 62% 49%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↓	-14%
Thames Water (2021 base sample: 200)	61.4%	<p>66% 55% 66% 67% 61% 61% 60% 60% 60% 53%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↓	-7%

United Utilities (2021 base sample: 701)	69.5%	<p>64% 65% 78% 75% 69% 69% 70% 70% 72% 65%</p> <p>Year</p>	↔	↔	-7%
Wessex Water (2021 base sample: 200)	73.5%	<p>78% 66% 78% 77% 74% 74% 70% 75% 80% 64%</p> <p>Year</p>	↔	↔	-16%
Yorkshire Water (2021 base sample: 500)	72.4%	<p>63% 66% 80% 75% 72% 74% 76% 75% 76% 71%</p> <p>Year</p>	↑	↑	-5%

Table 5: Care about service provision – WoCs

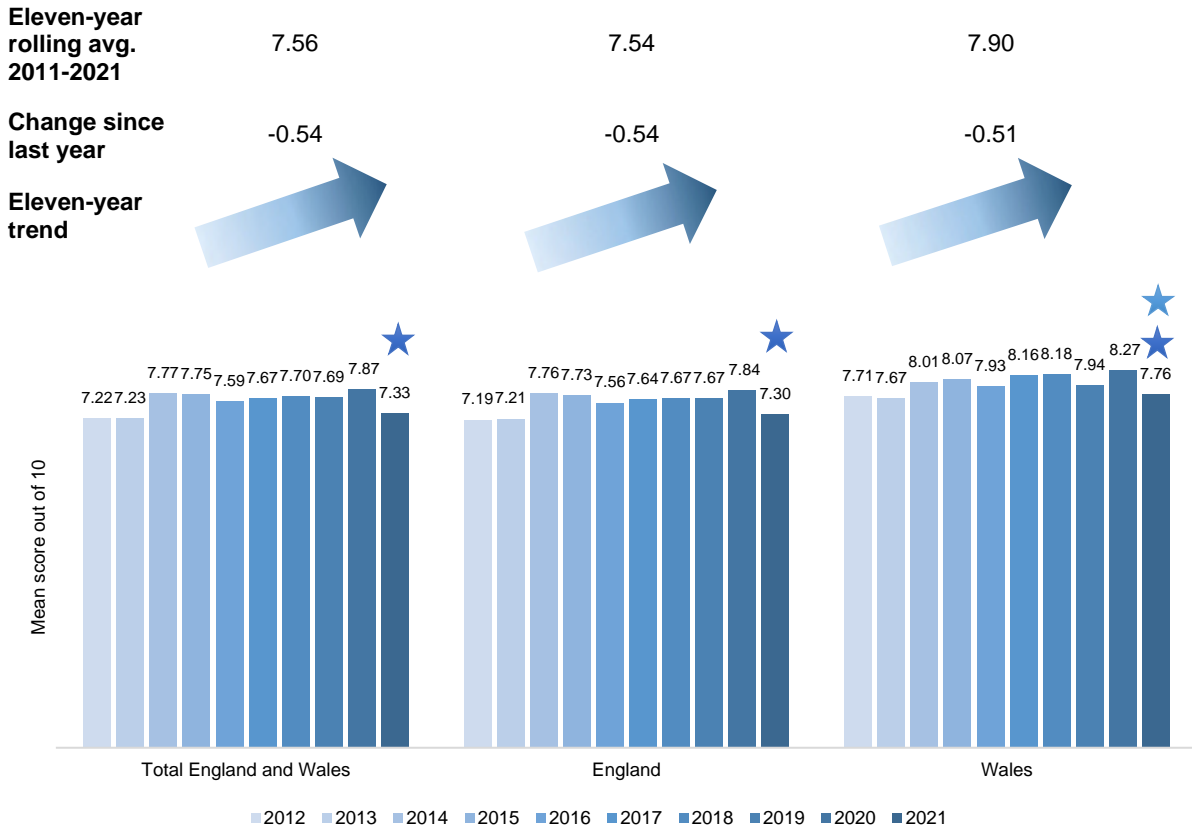
Water companies care about service provided to customers	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	68.2%	<p>65% 63% 74% 73% 68% 69% 69% 69% 71% 63%</p> <p>Year</p>	↔	n/a	-8%
Total WoCs (2021 base sample: 1657)	66.5%	<p>62% 61% 72% 71% 64% 71% 66% 67% 68% 60%</p> <p>Year</p>	↔	60%	-8%
Affinity Water Central (2021 base sample: 154)	61.3%	<p>54% 49% 68% 66% 60% 66% 61% 65% 66% 56%</p> <p>Year</p>	↔	↔	-10%
Affinity Water East (2021 base sample: 150)	66.7%	<p>59% 64% 71% 68% 62% 67% 63% 71% 72% 61%</p> <p>Year</p>	↔	↔	-10%
Affinity Water South East (2021 base sample: 150)	63.4%	<p>65% 53% 72% 66% 64% 68% 61% 67% 63% 52%</p> <p>Year</p>	↔	↓	-11%
Bristol Water (2021 base sample: 300)	75.7%	<p>77% 72% 77% 77% 65% 81% 74% 82% 80% 75%</p> <p>Year</p>	↑	↑	-5%

Cambridge Water (2021 base sample: 150)	72.3%	<p>70% 74% 85% 77% 72% 65% 74% 68% 72% 64%</p> <p>Year</p>	↓	↔	-8%
Essex & Suffolk Water (2021 base sample: 150)	67.4%	<p>66% 68% 67% 66% 68% 67% 69% 64% 74% 64%</p> <p>Year</p>	↔	↔	-10%
Portsmouth Water (2021 base sample: 150)	70.3%	<p>59% 71% 82% 73% 74% 68% 74% 67% 72% 62%</p> <p>Year</p>	↔	↔	-10%
South East Water (2021 base sample: 151)	62.3%	<p>62% 57% 69% 70% 59% 72% 60% 60% 61% 52%</p> <p>Year</p>	↔	↓	-8%
South Staffs Water (2021 base sample: 150)	69.2%	<p>64% 67% 72% 81% 62% 80% 68% 69% 69% 63%</p> <p>Year</p>	↔	↔	-6%
SES Water (2021 base sample: 151)	64.7%	<p>62% 63% 77% 72% 68% 66% 61% 67% 57% 55%</p> <p>Year</p>	↔	↔	-2%

1.2 Trust in water/sewerage companies

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

Figure 11: Trust in water/sewerage companies



- ★ Significant difference between 2020 and 2021 data
- ★ Significant difference between England and Wales 2021

Table 6: Trust in water/sewerage companies – WaSCs

Level of trust in water companies	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	7.56		↑	n/a	-0.54
Total WaSCs (2021 base sample: 3753)	7.57		↑	7.39	-0.47
Anglian Water (2021 base sample: 351)	7.64		↑	↑	-0.22

Dŵr Cymru Welsh Water (2021 base sample: 400)	7.90	<p>Year</p>	↑	↑	-0.55
Hafren Dyfrdwy (2021 base sample: 200)	7.86	<p>Year</p>	↔	↑	-0.01
Northumbrian Water (2021 base sample: 200)	7.87	<p>Year</p>	↔	↑	-0.46
Severn Trent (2021 base sample: 200)	7.66	<p>Year</p>	↑	↑	-0.43
South West Water (2021 base sample: 400)	7.21	<p>Year</p>	↑	↔	-0.51
Southern Water (2021 base sample: 401)	7.15	<p>Year</p>	↔	↓	-0.78
Thames Water (2021 base sample: 200)	7.21	<p>Year</p>	↔	↓	-0.34
United Utilities (2021 base sample: 701)	7.61	<p>Year</p>	↑	↔	-0.64
Wessex Water (2021 base sample: 200)	7.84	<p>Year</p>	↑	↔	-0.87
Yorkshire Water (2021 base sample: 500)	7.77	<p>Year</p>	↑	↑	-0.38

Table 7: Trust in water companies – WoCs

Level of trust in water companies	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year																						
Industry (2021 base sample: 5410)	7.56	<table border="1"> <caption>Industry Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.22</td><td>7.23</td><td>7.77</td><td>7.75</td><td>7.59</td><td>7.67</td><td>7.70</td><td>7.69</td><td>7.87</td><td>7.33</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.22	7.23	7.77	7.75	7.59	7.67	7.70	7.69	7.87	7.33	↑	n/a	-0.54
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.22	7.23	7.77	7.75	7.59	7.67	7.70	7.69	7.87	7.33																	
Total WoCs (2021 base sample: 1657)	7.53	<table border="1"> <caption>Total WoCs Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.14</td><td>7.28</td><td>7.78</td><td>7.83</td><td>7.46</td><td>7.69</td><td>7.61</td><td>7.74</td><td>7.91</td><td>7.08</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.14	7.28	7.78	7.83	7.46	7.69	7.61	7.74	7.91	7.08	↑	7.08	-0.83
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.14	7.28	7.78	7.83	7.46	7.69	7.61	7.74	7.91	7.08																	
Affinity Water Central (2021 base sample: 154)	7.39	<table border="1"> <caption>Affinity Water Central Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>6.90</td><td>7.11</td><td>7.74</td><td>7.68</td><td>7.46</td><td>7.39</td><td>7.41</td><td>7.81</td><td>7.82</td><td>6.94</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	6.90	7.11	7.74	7.68	7.46	7.39	7.41	7.81	7.82	6.94	↑	↔	-0.88
Year	12	13	14	15	16	17	18	19	20	21																	
Score	6.90	7.11	7.74	7.68	7.46	7.39	7.41	7.81	7.82	6.94																	
Affinity Water East (2021 base sample: 150)	7.51	<table border="1"> <caption>Affinity Water East Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.13</td><td>7.38</td><td>7.85</td><td>7.22</td><td>7.54</td><td>7.83</td><td>7.59</td><td>7.59</td><td>7.82</td><td>7.10</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.13	7.38	7.85	7.22	7.54	7.83	7.59	7.59	7.82	7.10	↔	↔	-0.72
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.13	7.38	7.85	7.22	7.54	7.83	7.59	7.59	7.82	7.10																	
Affinity Water South East (2021 base sample: 150)	7.29	<table border="1"> <caption>Affinity Water South East Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.36</td><td>6.83</td><td>7.46</td><td>7.54</td><td>7.34</td><td>7.31</td><td>7.59</td><td>7.30</td><td>7.78</td><td>6.63</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.36	6.83	7.46	7.54	7.34	7.31	7.59	7.30	7.78	6.63	↑	↓	-1.15
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.36	6.83	7.46	7.54	7.34	7.31	7.59	7.30	7.78	6.63																	
Bristol Water (2021 base sample: 300)	7.75	<table border="1"> <caption>Bristol Water Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.37</td><td>7.66</td><td>7.73</td><td>7.81</td><td>7.32</td><td>8.05</td><td>8.12</td><td>8.15</td><td>8.22</td><td>7.48</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.37	7.66	7.73	7.81	7.32	8.05	8.12	8.15	8.22	7.48	↑	↑	-0.74
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.37	7.66	7.73	7.81	7.32	8.05	8.12	8.15	8.22	7.48																	
Cambridge Water (2021 base sample: 150)	7.77	<table border="1"> <caption>Cambridge Water Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.78</td><td>7.47</td><td>8.19</td><td>7.71</td><td>7.63</td><td>7.90</td><td>8.11</td><td>7.99</td><td>7.73</td><td>7.46</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.78	7.47	8.19	7.71	7.63	7.90	8.11	7.99	7.73	7.46	↑	↑	-0.27
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.78	7.47	8.19	7.71	7.63	7.90	8.11	7.99	7.73	7.46																	
Essex & Suffolk Water (2021 base sample: 150)	7.58	<table border="1"> <caption>Essex & Suffolk Water Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.43</td><td>7.38</td><td>7.63</td><td>7.93</td><td>7.48</td><td>7.55</td><td>7.59</td><td>7.59</td><td>8.14</td><td>7.29</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.43	7.38	7.63	7.93	7.48	7.55	7.59	7.59	8.14	7.29	↑	↔	-0.86
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.43	7.38	7.63	7.93	7.48	7.55	7.59	7.59	8.14	7.29																	
Portsmouth Water (2021 base sample: 150)	7.71	<table border="1"> <caption>Portsmouth Water Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>7.13</td><td>7.59</td><td>8.19</td><td>7.67</td><td>7.64</td><td>8.20</td><td>7.80</td><td>7.87</td><td>8.10</td><td>7.07</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	7.13	7.59	8.19	7.67	7.64	8.20	7.80	7.87	8.10	7.07	↔	↔	-1.03
Year	12	13	14	15	16	17	18	19	20	21																	
Score	7.13	7.59	8.19	7.67	7.64	8.20	7.80	7.87	8.10	7.07																	
South East Water (2021 base sample: 151)	7.28	<table border="1"> <caption>South East Water Trust Scores (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Score</th><td>6.82</td><td>6.83</td><td>7.66</td><td>7.87</td><td>7.21</td><td>7.44</td><td>7.39</td><td>7.36</td><td>7.60</td><td>6.63</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Score	6.82	6.83	7.66	7.87	7.21	7.44	7.39	7.36	7.60	6.63	↔	↓	-0.97
Year	12	13	14	15	16	17	18	19	20	21																	
Score	6.82	6.83	7.66	7.87	7.21	7.44	7.39	7.36	7.60	6.63																	

South Staffs Water (2021 base sample: 150)	7.73	<table border="1"> <thead> <tr> <th>Year</th> <th>Value</th> </tr> </thead> <tbody> <tr><td>12</td><td>7.33</td></tr> <tr><td>13</td><td>7.69</td></tr> <tr><td>14</td><td>7.75</td></tr> <tr><td>15</td><td>8.19</td></tr> <tr><td>16</td><td>7.62</td></tr> <tr><td>17</td><td>8.02</td></tr> <tr><td>18</td><td>7.57</td></tr> <tr><td>19</td><td>7.87</td></tr> <tr><td>20</td><td>8.00</td></tr> <tr><td>21</td><td>7.25</td></tr> </tbody> </table>	Year	Value	12	7.33	13	7.69	14	7.75	15	8.19	16	7.62	17	8.02	18	7.57	19	7.87	20	8.00	21	7.25	↔	↔	-0.75
Year	Value																										
12	7.33																										
13	7.69																										
14	7.75																										
15	8.19																										
16	7.62																										
17	8.02																										
18	7.57																										
19	7.87																										
20	8.00																										
21	7.25																										
SES Water (2021 base sample: 151)	7.43	<table border="1"> <thead> <tr> <th>Year</th> <th>Value</th> </tr> </thead> <tbody> <tr><td>12</td><td>6.81</td></tr> <tr><td>13</td><td>7.24</td></tr> <tr><td>14</td><td>7.90</td></tr> <tr><td>15</td><td>7.61</td></tr> <tr><td>16</td><td>7.26</td></tr> <tr><td>17</td><td>7.82</td></tr> <tr><td>18</td><td>7.52</td></tr> <tr><td>19</td><td>7.58</td></tr> <tr><td>20</td><td>7.63</td></tr> <tr><td>21</td><td>7.23</td></tr> </tbody> </table>	Year	Value	12	6.81	13	7.24	14	7.90	15	7.61	16	7.26	17	7.82	18	7.52	19	7.58	20	7.63	21	7.23	↑	↔	-0.39
Year	Value																										
12	6.81																										
13	7.24																										
14	7.90																										
15	7.61																										
16	7.26																										
17	7.82																										
18	7.52																										
19	7.58																										
20	7.63																										
21	7.23																										

Chapter 2: Value for money, fairness and affordability

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

2.1 Value for money of water services

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

Figure 12: Satisfaction with value for money of water services

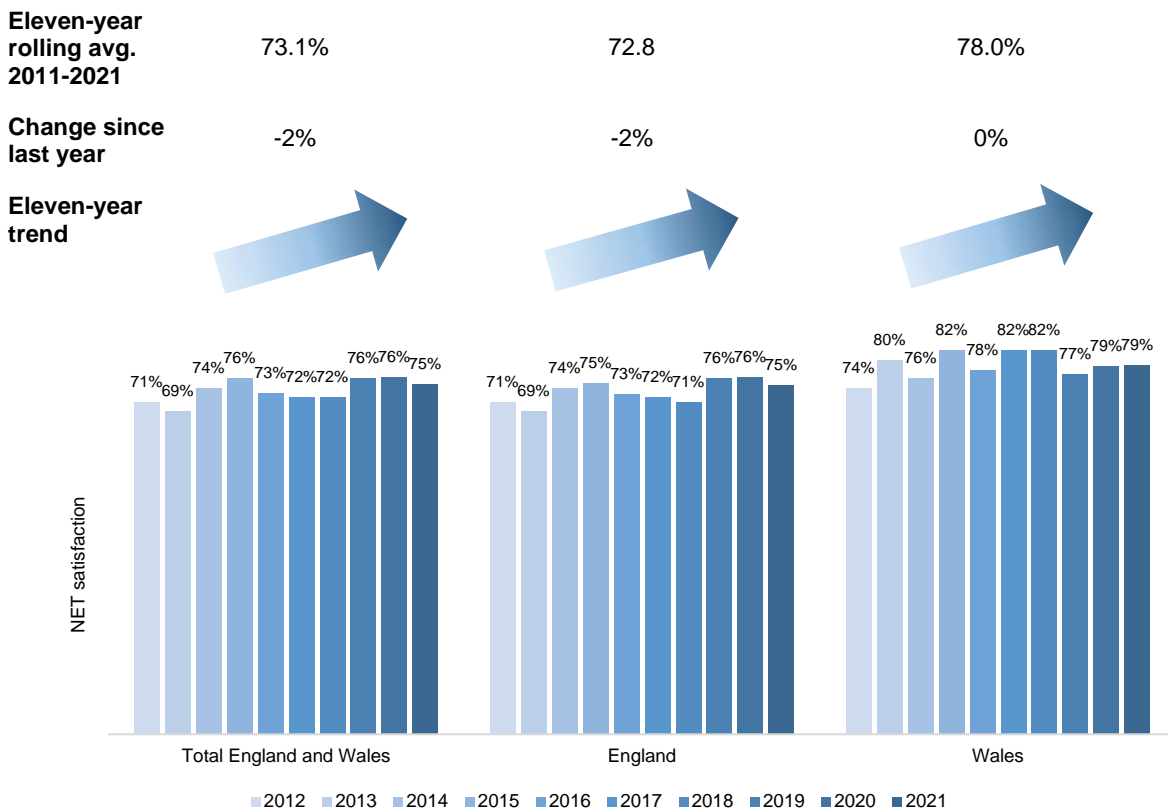


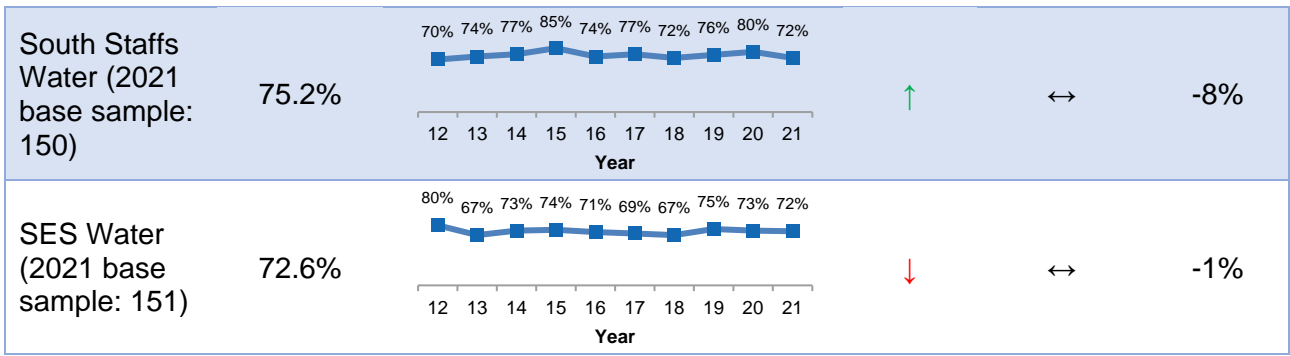
Table 8: Satisfaction with value for money of water services - WaSCs

Satisfaction with value for money of water services	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	73.1%		↑	n/a	-2%
Total WaSCs (2021 base sample: 3753)	73.2%		↑	76%	-1%

Anglian Water (2021 base sample: 351)	73.8%	<p>69% 71% 74% 77% 73% 79% 72% 74% 76% 76%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	0%
Dŵr Cymru Welsh Water (2021 base sample: 400)	78.1%	<p>74% 81% 75% 82% 78% 82% 82% 77% 79% 79%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	1%
Hafren Dyfrdwy (2021 base sample: 200)	76.0%	<p>76% 77% 79% 72%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-6%
Northumbrian Water (2021 base sample: 200)	78.6%	<p>74% 78% 77% 77% 84% 78% 75% 79% 79% 81%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	2%
Severn Trent (2021 base sample: 200)	76.0%	<p>71% 72% 77% 75% 78% 72% 78% 78% 84% 80%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	-4%
South West Water (2021 base sample: 400)	57.8%	<p>53% 51% 56% 58% 65% 54% 56% 65% 72% 66%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↓	-6%
Southern Water (2021 base sample: 401)	67.0%	<p>68% 68% 70% 66% 72% 61% 62% 67% 70% 66%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↓	-4%
Thames Water (2021 base sample: 200)	70.8%	<p>79% 63% 70% 74% 70% 66% 65% 75% 70% 75%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	5%
United Utilities (2021 base sample: 701)	71.2%	<p>66% 64% 75% 73% 68% 73% 71% 76% 77% 71%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↓	-6%
Wessex Water (2021 base sample: 200)	74.8%	<p>73% 74% 78% 76% 75% 76% 75% 79% 76% 76%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	0%
Yorkshire Water (2021 base sample: 500)	77.4%	<p>71% 73% 78% 82% 79% 76% 77% 79% 77% 79%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	2%

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

Satisfaction with value for money of water services	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	73.1%	<p>71% 69% 74% 76% 73% 72% 72% 76% 76% 75%</p> <p>Year</p>	↑	n/a	-2%
Total WoCs (2021 base sample: 1657)	72.8%	<p>69% 70% 75% 79% 70% 72% 70% 76% 76% 71%</p> <p>Year</p>	↔	71%	-4%
Affinity Water Central (2021 base sample: 154)	69.8%	<p>64% 62% 74% 78% 69% 63% 65% 77% 72% 69%</p> <p>Year</p>	↔	↔	-3%
Affinity Water East (2021 base sample: 150)	72.0%	<p>71% 77% 78% 71% 67% 71% 64% 75% 74% 68%</p> <p>Year</p>	↓	↔	-6%
Affinity Water South East (2021 base sample: 150)	69.4%	<p>70% 63% 72% 72% 72% 66% 71% 70% 66% 68%</p> <p>Year</p>	↔	↔	2%
Bristol Water (2021 base sample: 300)	75.0%	<p>71% 72% 70% 82% 62% 77% 75% 80% 84% 77%</p> <p>Year</p>	↔	↔	-7%
Cambridge Water (2021 base sample: 150)	76.0%	<p>79% 75% 80% 81% 75% 74% 68% 78% 74% 74%</p> <p>Year</p>	↓	↔	0%
Essex & Suffolk Water (2021 base sample: 150)	71.9%	<p>66% 72% 75% 70% 67% 71% 71% 76% 77% 73%</p> <p>Year</p>	↔	↔	-4%
Portsmouth Water (2021 base sample: 150)	79.8%	<p>75% 88% 79% 81% 79% 79% 77% 77% 82% 79%</p> <p>Year</p>	↔	↑	-3%
South East Water (2021 base sample: 151)	70.4%	<p>71% 64% 72% 83% 67% 74% 69% 70% 70% 66%</p> <p>Year</p>	↔	↔	-4%

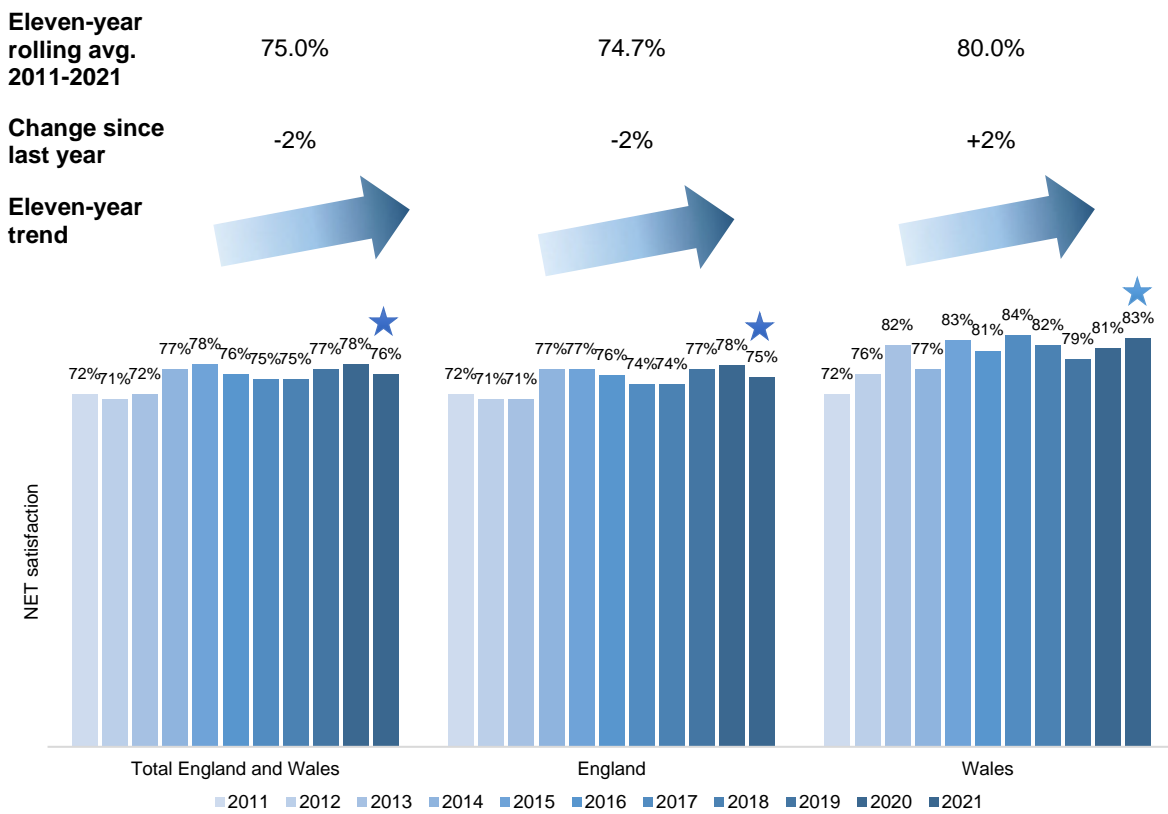


2.2 Value for money of sewerage services

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

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

Figure 13: Satisfaction with value for money of sewerage services



- ★ Significant difference between 2020 and 2021 data
- ★ Significant difference between England and Wales 2021

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

Satisfaction with value for money of sewerage services	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	75.0%	<p>71% 72% 77% 78% 76% 75% 75% 77% 78% 76%</p> <p>Year</p>	↑	n/a	-2%
Total WaSCs (2021 base sample: 3753)	75.6%	<p>72% 72% 77% 78% 77% 75% 75% 78% 78% 77%</p> <p>Year</p>	↑	77%	-1%
Anglian Water (2021 base sample: 351)	75.0%	<p>69% 72% 76% 80% 76% 78% 74% 75% 76% 78%</p> <p>Year</p>	↑	↔	2%
Dŵr Cymru Welsh Water (2021 base sample: 400)	80.2%	<p>77% 83% 76% 83% 81% 84% 83% 79% 81% 84%</p> <p>Year</p>	↑	↑	2%
Hafren Dyfrdwy (2021 base sample: 200)	79.6%	<p>76% 81% 81% 80%</p> <p>Year</p>	↔	↔	0%
Northumbrian Water (2021 base sample: 200)	80.8%	<p>77% 80% 80% 79% 84% 78% 78% 84% 81% 83%</p> <p>Year</p>	↔	↑	2%
Severn Trent (2021 base sample: 200)	77.9%	<p>73% 74% 79% 79% 80% 75% 79% 80% 87% 81%</p> <p>Year</p>	↑	↔	-6%
South West Water (2021 base sample: 400)	57.4%	<p>52% 54% 53% 61% 60% 58% 57% 66% 67% 65%</p> <p>Year</p>	↑	↓	-2%
Southern Water (2021 base sample: 401)	70.1%	<p>68% 74% 72% 69% 73% 68% 63% 74% 71% 68%</p> <p>Year</p>	↓	↓	-3%
Thames Water (2021 base sample: 200)	73.1%	<p>78% 67% 76% 76% 78% 69% 70% 75% 72% 70%</p> <p>Year</p>	↔	↓	-1%

Wessex Water (2021 base sample: 200)	77.3%		↑	↔	-4%	
Yorkshire Water (2021 base sample: 500)	79.4%		↑	↑	4%	

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

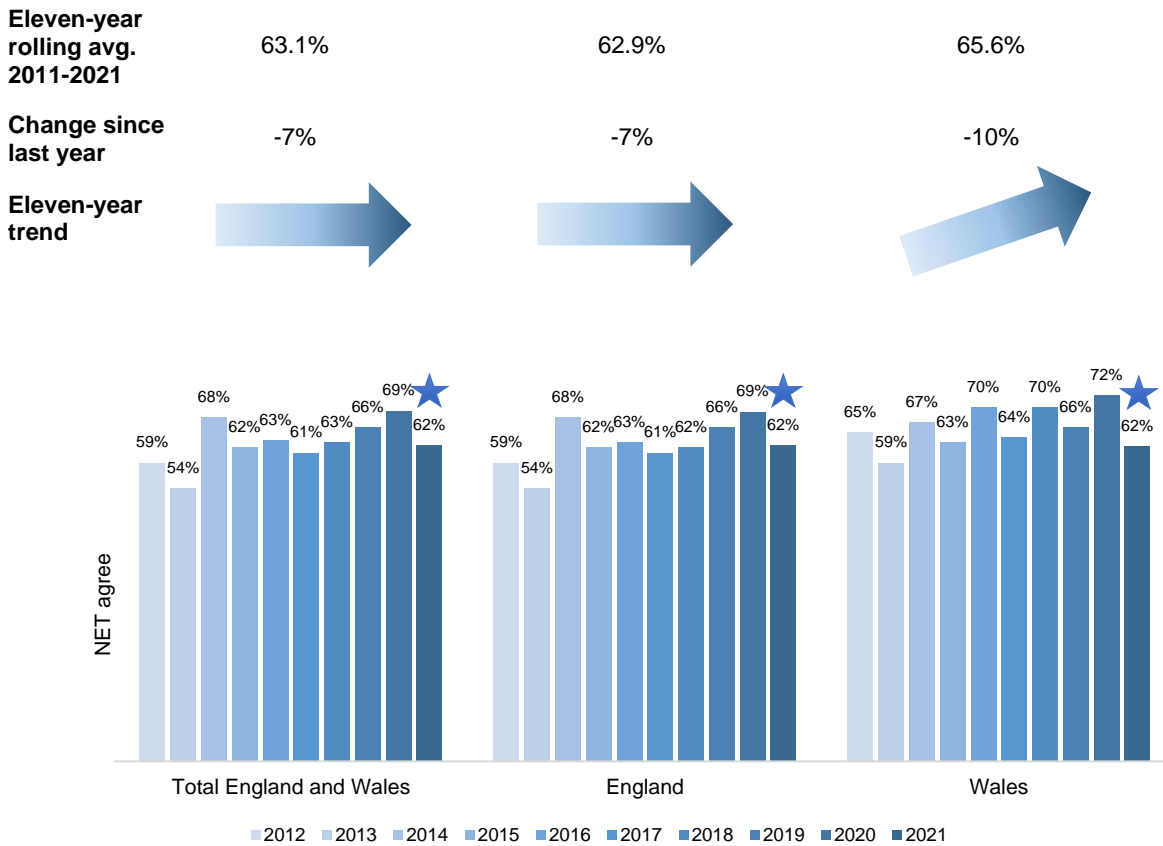
Satisfaction with value for money of sewerage services	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	75.0%		↑	n/a	-2%
Total WoCs (2021 base sample: 1657)	73.0%		↑	70%	-6%
Affinity Water Central (2021 base sample: 154)	72.1%		↔	↔	-10%
Affinity Water East (2021 base sample: 150)	72.4%		↔	↔	-6%
Affinity Water South East (2021 base sample: 150)	65.8%		↓	↓	0%
Bristol Water (2021 base sample: 300)	76.6%		↔	↑	-1%
Cambridge Water (2021 base sample: 150)	74.4%		↔	↔	-4%

Essex & Suffolk Water (2021 base sample: 150)	70.9%	<p>61% 71% 74% 70% 70% 72% 66% 74% 76% 78%</p> <p>Year</p>	↑	↑	2%
Portsmouth Water (2021 base sample: 150)	72.1%	<p>69% 78% 77% 73% 74% 74% 69% 65% 81% 60%</p> <p>Year</p>	↔	↓	-21%
South East Water (2021 base sample: 151)	70.3%	<p>71% 63% 73% 78% 65% 74% 73% 69% 71% 66%</p> <p>Year</p>	↔	↔	-5%
South Staffs Water (2021 base sample: 150)	76.3%	<p>66% 74% 80% 83% 75% 82% 76% 75% 83% 73%</p> <p>Year</p>	↑	↔	-10%
SES Water (2021 base sample: 151)	71.6%	<p>78% 67% 73% 76% 73% 66% 64% 76% 69% 72%</p> <p>Year</p>	↓	↔	3%

2.3 Fairness of charges

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

Figure 14: Fairness of charges



★ Significant difference between 2020 and 2021 data.

Table 12: Fairness of charges – WaSCs

Agree charges are fair	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	63.1%	59% 54% 68% 62% 63% 61% 63% 66% 69% 62%	↔	n/a	-7%
Total WaSCs (2021 base sample: 3753)	63.2%	59% 54% 68% 62% 64% 61% 63% 66% 69% 63%	↔	63%	-6%
Anglian Water (2021 base sample: 351)	64.0%	57% 54% 68% 64% 64% 67% 62% 65% 72% 67%	↑	↔	-5%

Dŵr Cymru Welsh Water (2021 base sample: 400)	65.5%	<p>65% 59% 67% 63% 70% 64% 71% 66% 72% 62%</p> <p>Year</p>	↑	↔	-10%
Hafren Dyfrdwy (2021 base sample: 200)	64.2%	<p>61% 63% 71% 62%</p> <p>Year</p>	↔	↔	-9%
Northumbrian Water (2021 base sample: 200)	68.1%	<p>64% 63% 76% 66% 73% 64% 63% 60% 72% 71%</p> <p>Year</p>	↔	↑	0%
Severn Trent (2021 base sample: 200)	65.8%	<p>58% 59% 69% 64% 69% 58% 68% 69% 77% 68%</p> <p>Year</p>	↑	↔	-8%
South West Water (2021 base sample: 400)	42.9%	<p>43% 29% 46% 39% 46% 39% 38% 50% 57% 51%</p> <p>Year</p>	↑	↓	-6%
Southern Water (2021 base sample: 401)	60.8%	<p>60% 57% 68% 53% 67% 62% 60% 59% 61% 56%</p> <p>Year</p>	↓	↓	-6%
Thames Water (2021 base sample: 200)	61.7%	<p>65% 53% 67% 60% 58% 61% 61% 65% 62% 61%</p> <p>Year</p>	↔	↔	-1%
United Utilities (2021 base sample: 701)	60.9%	<p>54% 48% 68% 62% 59% 60% 62% 65% 68% 58%</p> <p>Year</p>	↔	↔	-10%
Wessex Water (2021 base sample: 200)	65.8%	<p>71% 57% 69% 65% 67% 67% 62% 65% 76% 66%</p> <p>Year</p>	↑	↔	-10%
Yorkshire Water (2021 base sample: 500)	68.0%	<p>59% 59% 71% 67% 71% 65% 69% 75% 72% 66%</p> <p>Year</p>	↔	↔	-6%

Table 13: Fairness of charges - WoCs

Agree charges are fair	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year																						
Industry (2021 base sample: 5410)	63.1%	<table border="1"> <caption>Industry Fairness Trend (2012-2021)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>12</td><td>59%</td></tr> <tr><td>13</td><td>54%</td></tr> <tr><td>14</td><td>68%</td></tr> <tr><td>15</td><td>62%</td></tr> <tr><td>16</td><td>63%</td></tr> <tr><td>17</td><td>61%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>66%</td></tr> <tr><td>20</td><td>69%</td></tr> <tr><td>21</td><td>62%</td></tr> </tbody> </table>	Year	Fairness %	12	59%	13	54%	14	68%	15	62%	16	63%	17	61%	18	63%	19	66%	20	69%	21	62%	↔	n/a	-7%
Year	Fairness %																										
12	59%																										
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14	68%																										
15	62%																										
16	63%																										
17	61%																										
18	63%																										
19	66%																										
20	69%																										
21	62%																										
Total WoCs (2021 base sample: 1657)	62.9%	<table border="1"> <caption>Total WoCs Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>68%</td></tr> <tr><td>12</td><td>60%</td></tr> <tr><td>13</td><td>54%</td></tr> <tr><td>14</td><td>67%</td></tr> <tr><td>15</td><td>62%</td></tr> <tr><td>16</td><td>61%</td></tr> <tr><td>17</td><td>62%</td></tr> <tr><td>18</td><td>60%</td></tr> <tr><td>19</td><td>67%</td></tr> <tr><td>20</td><td>69%</td></tr> </tbody> </table>	Year	Fairness %	11	68%	12	60%	13	54%	14	67%	15	62%	16	61%	17	62%	18	60%	19	67%	20	69%	↔	69%	+2%
Year	Fairness %																										
11	68%																										
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14	67%																										
15	62%																										
16	61%																										
17	62%																										
18	60%																										
19	67%																										
20	69%																										
Affinity Water Central (2021 base sample: 154)	59.5%	<table border="1"> <caption>Affinity Water Central Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>62%</td></tr> <tr><td>12</td><td>54%</td></tr> <tr><td>13</td><td>53%</td></tr> <tr><td>14</td><td>62%</td></tr> <tr><td>15</td><td>57%</td></tr> <tr><td>16</td><td>59%</td></tr> <tr><td>17</td><td>58%</td></tr> <tr><td>18</td><td>55%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>69%</td></tr> </tbody> </table>	Year	Fairness %	11	62%	12	54%	13	53%	14	62%	15	57%	16	59%	17	58%	18	55%	19	68%	20	69%	↔	↔	+1%
Year	Fairness %																										
11	62%																										
12	54%																										
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15	57%																										
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18	55%																										
19	68%																										
20	69%																										
Affinity Water East (2021 base sample: 150)	62.5%	<table border="1"> <caption>Affinity Water East Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>71%</td></tr> <tr><td>12</td><td>59%</td></tr> <tr><td>13</td><td>56%</td></tr> <tr><td>14</td><td>70%</td></tr> <tr><td>15</td><td>61%</td></tr> <tr><td>16</td><td>61%</td></tr> <tr><td>17</td><td>59%</td></tr> <tr><td>18</td><td>57%</td></tr> <tr><td>19</td><td>65%</td></tr> <tr><td>20</td><td>67%</td></tr> </tbody> </table>	Year	Fairness %	11	71%	12	59%	13	56%	14	70%	15	61%	16	61%	17	59%	18	57%	19	65%	20	67%	↔	↔	+2%
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Affinity Water South East (2021 base sample: 150)	59.3%	<table border="1"> <caption>Affinity Water South East Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>69%</td></tr> <tr><td>12</td><td>66%</td></tr> <tr><td>13</td><td>47%</td></tr> <tr><td>14</td><td>66%</td></tr> <tr><td>15</td><td>57%</td></tr> <tr><td>16</td><td>63%</td></tr> <tr><td>17</td><td>52%</td></tr> <tr><td>18</td><td>50%</td></tr> <tr><td>19</td><td>58%</td></tr> <tr><td>20</td><td>65%</td></tr> </tbody> </table>	Year	Fairness %	11	69%	12	66%	13	47%	14	66%	15	57%	16	63%	17	52%	18	50%	19	58%	20	65%	↓	↔	+7%
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Bristol Water (2021 base sample: 300)	70.6%	<table border="1"> <caption>Bristol Water Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>71%</td></tr> <tr><td>12</td><td>63%</td></tr> <tr><td>13</td><td>61%</td></tr> <tr><td>14</td><td>79%</td></tr> <tr><td>15</td><td>61%</td></tr> <tr><td>16</td><td>81%</td></tr> <tr><td>17</td><td>71%</td></tr> <tr><td>18</td><td>72%</td></tr> <tr><td>19</td><td>76%</td></tr> <tr><td>20</td><td>74%</td></tr> </tbody> </table>	Year	Fairness %	11	71%	12	63%	13	61%	14	79%	15	61%	16	81%	17	71%	18	72%	19	76%	20	74%	↑	↔	-2%
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Essex & Suffolk Water (2021 base sample: 150)	67.5%	<table border="1"> <caption>Essex & Suffolk Water Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>69%</td></tr> <tr><td>12</td><td>70%</td></tr> <tr><td>13</td><td>56%</td></tr> <tr><td>14</td><td>72%</td></tr> <tr><td>15</td><td>67%</td></tr> <tr><td>16</td><td>67%</td></tr> <tr><td>17</td><td>66%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>77%</td></tr> <tr><td>20</td><td>69%</td></tr> </tbody> </table>	Year	Fairness %	11	69%	12	70%	13	56%	14	72%	15	67%	16	67%	17	66%	18	63%	19	77%	20	69%	↔	↔	-8%
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Portsmouth Water (2021 base sample: 150)	62.2%	<table border="1"> <caption>Portsmouth Water Fairness Trend (2011-2020)</caption> <thead> <tr><th>Year</th><th>Fairness %</th></tr> </thead> <tbody> <tr><td>11</td><td>73%</td></tr> <tr><td>12</td><td>55%</td></tr> <tr><td>13</td><td>58%</td></tr> <tr><td>14</td><td>63%</td></tr> <tr><td>15</td><td>58%</td></tr> <tr><td>16</td><td>58%</td></tr> <tr><td>17</td><td>57%</td></tr> <tr><td>18</td><td>61%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>72%</td></tr> </tbody> </table>	Year	Fairness %	11	73%	12	55%	13	58%	14	63%	15	58%	16	58%	17	57%	18	61%	19	68%	20	72%	↔	↔	+3%
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South East Water (2021 base sample: 151)	72.4%		↔	↔	-11%
South Staffs Water (2021 base sample: 150)	68.3%		↔	↔	+4%
SES Water (2021 base sample: 151)	61.4%		↔	↔	+2%
South Staffs Water (2021 base sample: 151)	66.4%		↔	↔	+11%
SES Water (2021 base sample: 150)	63.0%		↓	↔	0%

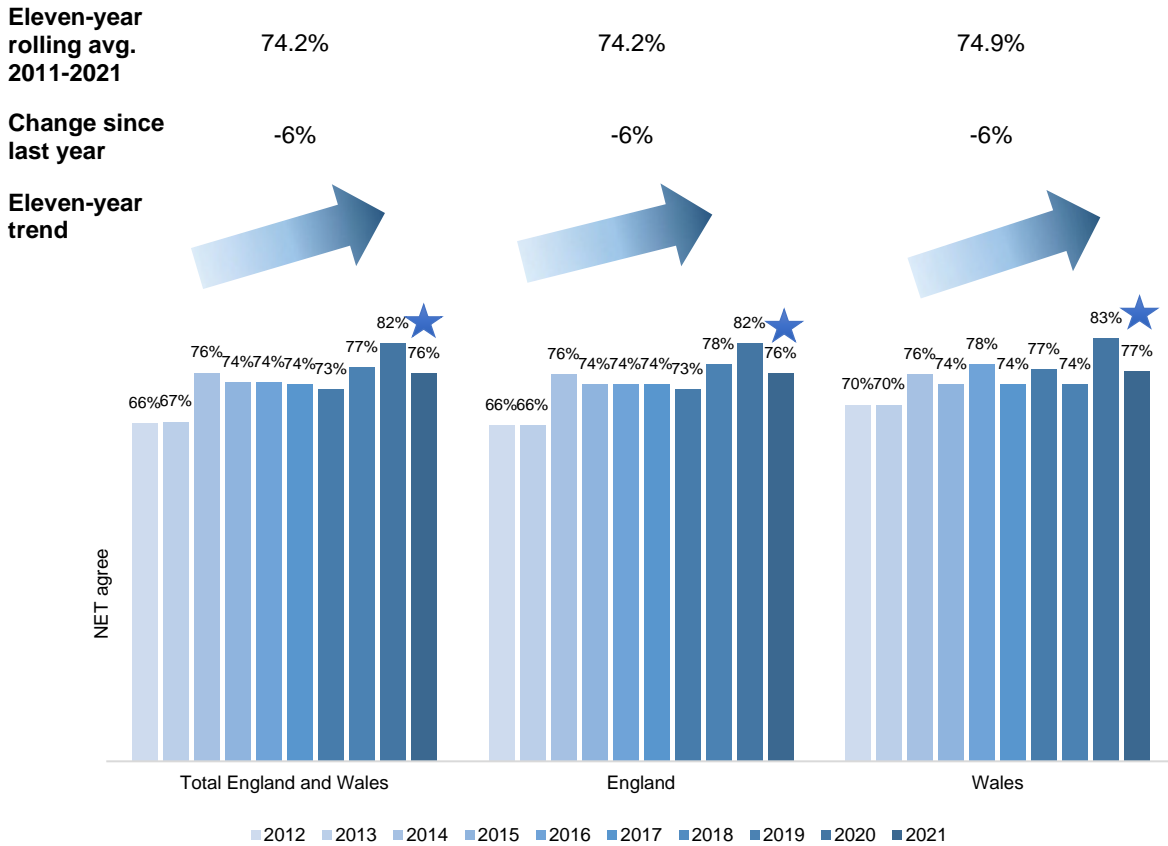
2.4 Affordability of charges

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

Prior to 2019, affordability of water and sewerage charges was also reported separately for WoCs (affordability of water charges, affordability of sewerage charges, with a third question asking about affordability of the total charges – introduced in 2013). The questions regarding water charges and sewerage charges were dropped in 2019 and data for WoCs is only presented at a total level.²⁰

²⁰ In previous years the vast majority of people gave the same response across all 3 measures; and if they didn't then two-thirds of the time the water bill and the overall/combined rating matched, which shows that water was much more on their mind than sewerage when answering for overall affordability. Therefore, any statistical changes won't be because of this change.

Figure 15: Affordability of water and sewerage charges



★ Significant difference between 2020 and 2021 data.

Table 14: Affordability of water and sewerage charges – WaSCs

Agree charges are affordable	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	74.2%	66% 67% 76% 74% 74% 74% 73% 77% 82% 76%	↑	n/a	-6%
Total WaSCs (2021 base sample: 3753)	74.0%	66% 66% 76% 74% 75% 74% 74% 77% 82% 76%	↑	n/a	-6%
Anglian Water (2021 base sample: 351)	75.1%	65% 67% 78% 78% 75% 81% 73% 76% 84% 77%	↑	↔	-7%
Dŵr Cymru Welsh Water (2021 base sample: 400)	74.8%	70% 70% 75% 73% 78% 74% 77% 74% 83% 77%	↑	↔	-6%

Hafren Dyfrdwy (2021 base sample: 200)	76.3%	<p>74% 75% 81% 75%</p>	↔	↔	-7%
Northumbrian Water (2021 base sample: 200)	78.6%	<p>73% 71% 84% 74% 83% 81% 75% 74% 85% 81%</p>	↔	↔	-4%
Severn Trent (2021 base sample: 200)	75.2%	<p>64% 70% 74% 77% 78% 75% 77% 77% 85% 80%</p>	↑	↔	-5%
South West Water (2021 base sample: 400)	60.6%	<p>56% 48% 58% 61% 62% 61% 57% 66% 75% 67%</p>	↑	↓	-8%
Southern Water (2021 base sample: 401)	73.0%	<p>64% 69% 79% 68% 77% 71% 70% 78% 82% 72%</p>	↑	↔	-10%
Thames Water (2021 base sample: 200)	71.2%	<p>69% 64% 72% 67% 69% 69% 71% 76% 76% 76%</p>	↔	↔	↔
United Utilities (2021 base sample: 701)	73.5%	<p>65% 62% 78% 76% 73% 73% 74% 80% 83% 74%</p>	↑	↔	-9%
Wessex Water (2021 base sample: 200)	77.3%	<p>78% 66% 80% 80% 80% 78% 76% 79% 87% 74%</p>	↑	↔	-13%
Yorkshire Water (2021 base sample: 500)	77.6%	<p>65% 70% 80% 79% 77% 76% 76% 83% 82% 79%</p>	↔	↔	-3%

Table 15: Affordability of water and sewerage charges – WoCs

Agree total charges are affordable	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WoC average	Change since last year																						
Industry (2021 base sample: 5410)	74.2%	<table border="1"> <caption>Industry Eight-year Company Trend</caption> <thead> <tr><th>Year</th><th>Value (%)</th></tr> </thead> <tbody> <tr><td>12</td><td>66%</td></tr> <tr><td>13</td><td>67%</td></tr> <tr><td>14</td><td>76%</td></tr> <tr><td>15</td><td>74%</td></tr> <tr><td>16</td><td>74%</td></tr> <tr><td>17</td><td>74%</td></tr> <tr><td>18</td><td>73%</td></tr> <tr><td>19</td><td>77%</td></tr> <tr><td>20</td><td>82%</td></tr> <tr><td>21</td><td>76%</td></tr> </tbody> </table>	Year	Value (%)	12	66%	13	67%	14	76%	15	74%	16	74%	17	74%	18	73%	19	77%	20	82%	21	76%	↑	n/a	-6%
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Total WoCs (2021 base sample: 1657)	75.5%	<table border="1"> <caption>Total WoCs Eight-year Company Trend</caption> <thead> <tr><th>Year</th><th>Value (%)</th></tr> </thead> <tbody> <tr><td>13</td><td>69%</td></tr> <tr><td>14</td><td>77%</td></tr> <tr><td>15</td><td>77%</td></tr> <tr><td>16</td><td>73%</td></tr> <tr><td>17</td><td>75%</td></tr> <tr><td>18</td><td>71%</td></tr> <tr><td>19</td><td>79%</td></tr> <tr><td>20</td><td>83%</td></tr> <tr><td>21</td><td>75%</td></tr> </tbody> </table>	Year	Value (%)	13	69%	14	77%	15	77%	16	73%	17	75%	18	71%	19	79%	20	83%	21	75%	↑	n/a	-8%		
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Affinity Water Central (2021 base sample: 154)	73.5%	<table border="1"> <caption>Affinity Water Central Eight-year Company Trend</caption> <thead> <tr><th>Year</th><th>Value (%)</th></tr> </thead> <tbody> <tr><td>13</td><td>66%</td></tr> <tr><td>14</td><td>72%</td></tr> <tr><td>15</td><td>76%</td></tr> <tr><td>16</td><td>71%</td></tr> <tr><td>17</td><td>77%</td></tr> <tr><td>18</td><td>65%</td></tr> <tr><td>19</td><td>78%</td></tr> <tr><td>20</td><td>83%</td></tr> <tr><td>21</td><td>75%</td></tr> </tbody> </table>	Year	Value (%)	13	66%	14	72%	15	76%	16	71%	17	77%	18	65%	19	78%	20	83%	21	75%	↑	↔	-8%		
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Affinity Water East (2021 base sample: 150)	73.7%	<table border="1"> <caption>Affinity Water East Eight-year Company Trend</caption> <thead> <tr><th>Year</th><th>Value (%)</th></tr> </thead> <tbody> <tr><td>13</td><td>64%</td></tr> <tr><td>14</td><td>78%</td></tr> <tr><td>15</td><td>72%</td></tr> <tr><td>16</td><td>76%</td></tr> <tr><td>17</td><td>76%</td></tr> <tr><td>18</td><td>71%</td></tr> <tr><td>19</td><td>80%</td></tr> <tr><td>20</td><td>79%</td></tr> <tr><td>21</td><td>70%</td></tr> </tbody> </table>	Year	Value (%)	13	64%	14	78%	15	72%	16	76%	17	76%	18	71%	19	80%	20	79%	21	70%	↑	↔	-9%		
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South Staffs Water (2021 base sample: 150)	76.2%	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>13</td><td>67%</td></tr> <tr><td>14</td><td>79%</td></tr> <tr><td>15</td><td>85%</td></tr> <tr><td>16</td><td>75%</td></tr> <tr><td>17</td><td>79%</td></tr> <tr><td>18</td><td>72%</td></tr> <tr><td>19</td><td>75%</td></tr> <tr><td>20</td><td>83%</td></tr> <tr><td>21</td><td>70%</td></tr> </tbody> </table>	Year	Percentage	13	67%	14	79%	15	85%	16	75%	17	79%	18	72%	19	75%	20	83%	21	70%	↑	↔	-13%
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19	75%																								
20	83%																								
21	70%																								
SES Water (2021 base sample: 151)	76.4%	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>13</td><td>73%</td></tr> <tr><td>14</td><td>86%</td></tr> <tr><td>15</td><td>76%</td></tr> <tr><td>16</td><td>75%</td></tr> <tr><td>17</td><td>72%</td></tr> <tr><td>18</td><td>72%</td></tr> <tr><td>19</td><td>80%</td></tr> <tr><td>20</td><td>81%</td></tr> <tr><td>21</td><td>73%</td></tr> </tbody> </table>	Year	Percentage	13	73%	14	86%	15	76%	16	75%	17	72%	18	72%	19	80%	20	81%	21	73%	↑	↔	-8%
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19	80%																								
20	81%																								
21	73%																								

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

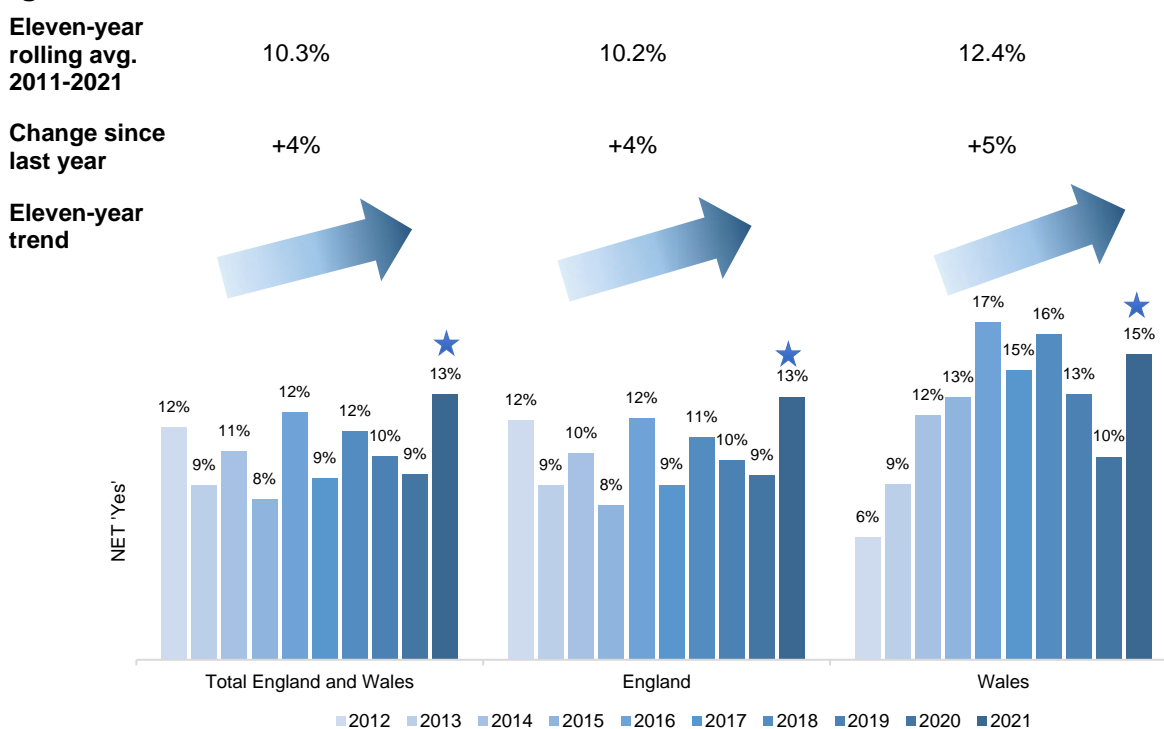
Chapter 3: Awareness of WaterSure support tariff, Priority Services and metering options

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

3.1 Awareness of WaterSure/WaterSure Wales

The WaterSure tariff is provided by all companies in England and Wales. It aims to help customers in genuine financial hardship who struggle to afford their water charges by capping their annual charge so it is no more than the average metered bill for the company that serves them. Customers must first meet a number of criteria to be eligible for WaterSure. To understand awareness of the WaterSure social tariff, customers were asked if they had ever heard of it or were subscribed to it. Figure 16 shows awareness and take-up across England and Wales, and for each nation over the last ten years. This is followed by Table 16 and Table 17, which show awareness and take-up for WaSCs and for WoCs respectively.

Figure 16: Awareness of WaterSure/WaterSure Wales



★ Significant difference between 2020 and 2021 data.

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

Table 16: Awareness of WaterSure/ WaterSure Wales – WaSCs

Awareness of WaterSure/ WaterSure Wales	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year																						
Industry (2021 base sample: 5410)	10.3%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>12</td><td>9</td><td>11</td><td>8</td><td>12</td><td>9</td><td>12</td><td>10</td><td>9</td><td>13</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	12	9	11	8	12	9	12	10	9	13	↑	n/a	+4%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	12	9	11	8	12	9	12	10	9	13																	
Total WaSCs (2021 base sample: 3753)	10.4%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>11</td><td>9</td><td>11</td><td>9</td><td>13</td><td>9</td><td>12</td><td>10</td><td>9</td><td>13</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	11	9	11	9	13	9	12	10	9	13	↑	n/a	+5%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	11	9	11	9	13	9	12	10	9	13																	
Anglian Water (2021 base sample: 351)	12.9%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>10</td><td>14</td><td>11</td><td>13</td><td>17</td><td>11</td><td>15</td><td>11</td><td>11</td><td>17</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	10	14	11	13	17	11	15	11	11	17	↑	↑	+6%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	10	14	11	13	17	11	15	11	11	17																	
Dŵr Cymru Welsh Water (2021 base sample: 400)	12.6%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>6</td><td>9</td><td>13</td><td>13</td><td>18</td><td>15</td><td>17</td><td>14</td><td>10</td><td>15</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	6	9	13	13	18	15	17	14	10	15	↑	↔	+5%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	6	9	13	13	18	15	17	14	10	15																	
Hafren Dyfrdwy (2021 base sample: 200)	13.3%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td></td><td></td><td></td><td></td><td></td><td></td><td>11</td><td>12</td><td>13</td><td>16</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)							11	12	13	16	↔	↔	+3%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)							11	12	13	16																	
Northumbrian Water (2021 base sample: 200)	8.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>4</td><td>9</td><td>11</td><td>9</td><td>12</td><td>6</td><td>8</td><td>10</td><td>6</td><td>11</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	4	9	11	9	12	6	8	10	6	11	↑	↔	+5%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	4	9	11	9	12	6	8	10	6	11																	
Severn Trent (2021 base sample: 200)	8.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>7</td><td>6</td><td>9</td><td>7</td><td>10</td><td>7</td><td>10</td><td>10</td><td>7</td><td>10</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	7	6	9	7	10	7	10	10	7	10	↑	↔	+3%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	7	6	9	7	10	7	10	10	7	10																	
South West Water (2021 base sample: 400)	18.5%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>25</td><td>19</td><td>18</td><td>17</td><td>20</td><td>18</td><td>17</td><td>19</td><td>15</td><td>15</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	25	19	18	17	20	18	17	19	15	15	↓	↔	0%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	25	19	18	17	20	18	17	19	15	15																	
Southern Water (2021 base sample: 401)	13.6%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>36</td><td>14</td><td>12</td><td>10</td><td>14</td><td>10</td><td>14</td><td>11</td><td>10</td><td>13</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	36	14	12	10	14	10	14	11	10	13	↔	↔	+3%
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Awareness (%)	36	14	12	10	14	10	14	11	10	13																	
Thames Water (2021 base sample: 200)	11.6%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>23</td><td>5</td><td>10</td><td>8</td><td>15</td><td>9</td><td>14</td><td>11</td><td>10</td><td>18</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	23	5	10	8	15	9	14	11	10	18	↑	↔	+8%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	23	5	10	8	15	9	14	11	10	18																	

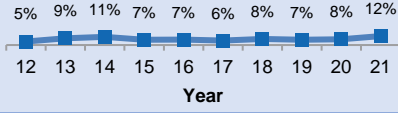
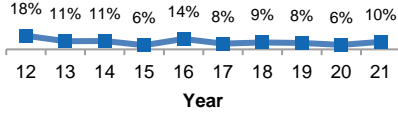
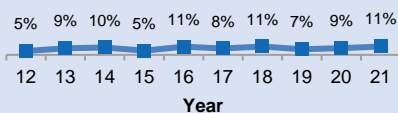
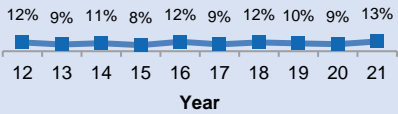
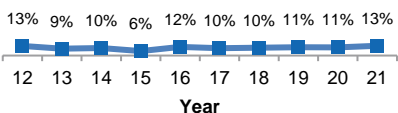
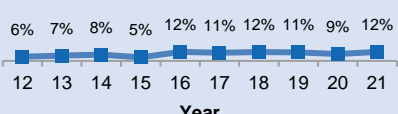
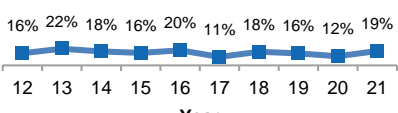
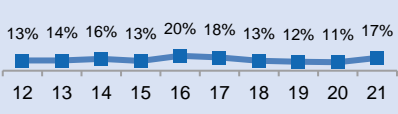
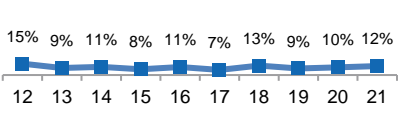
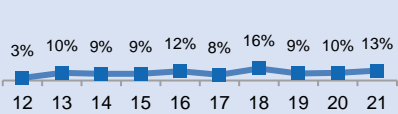
United Utilities (2021 base sample: 701)	7.9%		↔	↔	+4%
Wessex Water (2021 base sample: 200)	10.0%		↔	↔	+4%
Yorkshire Water (2021 base sample: 500)	8.4%		↑	↔	+3%

Table 17: Awareness of WaterSure – WoCs

Awareness of WaterSure	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	10.3%		↑	n/a	+4%
Total WoCs (2021 base sample: 1657)	10.1%		↑	n/a	+2%
Affinity Water Central (2021 base sample: 154)	9.0%		↑	↔	+3%
Affinity Water East (2021 base sample: 150)	17.1%		↓	↑	+7%
Affinity Water South East (2021 base sample: 150)	14.5%		↔	↔	+6%
Bristol Water (2021 base sample: 300)	9.9%		↑	↔	+1%
Cambridge Water (2021 base sample: 150)	10.0%		↑	↔	+3%

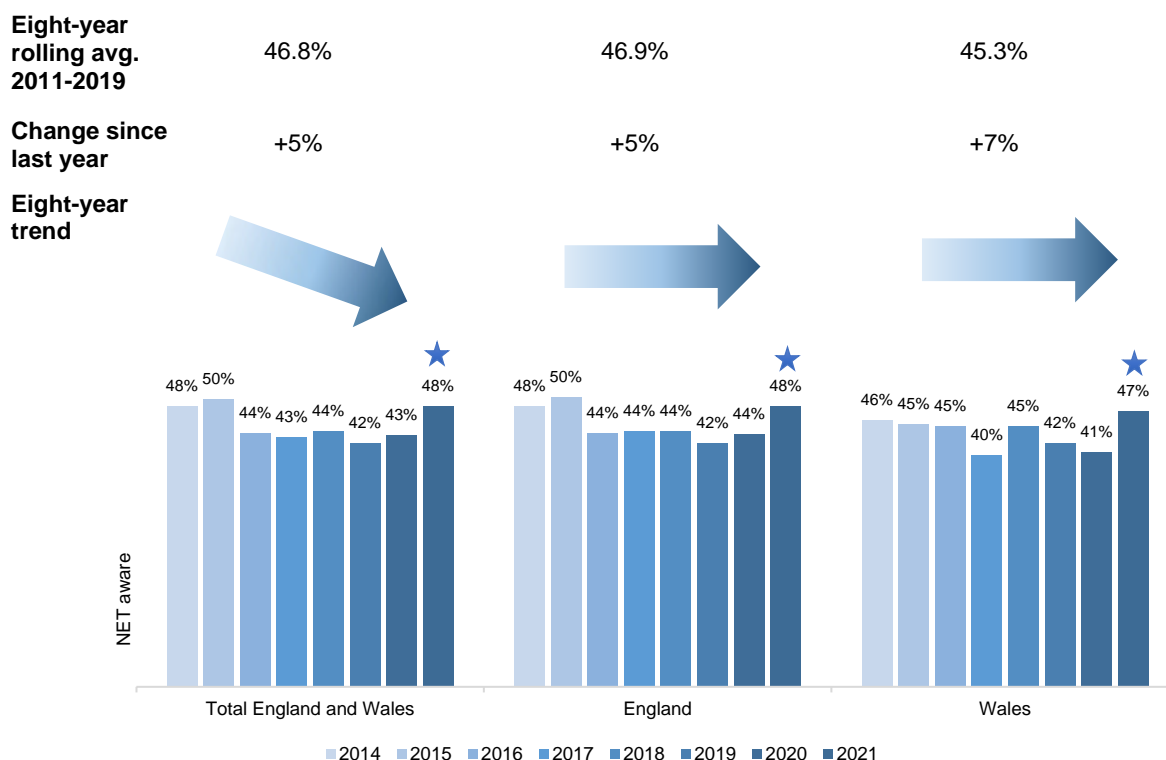
Essex & Suffolk Water (2021 base sample: 150)	11.2%		↔	↔	+4%
Portsmouth Water (2021 base sample: 151)	9.0%		↔	↔	+4%
South East Water (2021 base sample: 151)	10.2%		↔	↔	-2%
South Staffs Water (2021 base sample: 150)	9.8%		↑	↔	+5%
SES Water (2021 base sample: 151)	10.6%		↔	↔	+1%

3.2 Awareness of Priority Services

Respondents were asked if they were aware of any additional services provided by their water company, such as: large print or Braille bills for people who need them, passwords to check that company callers are genuine, liaison with customers on dialysis who need a constant supply of water, and records of households which may need bottled water delivered in the event of disruption to water supplies. The question wording changed in 2014 to its current form²¹ so eight years of data is shown.

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

Figure 17: Awareness of Priority Services



★Significant difference between 2020 and 2021 data.

Table 18: Awareness of Priority Services – WaSCs

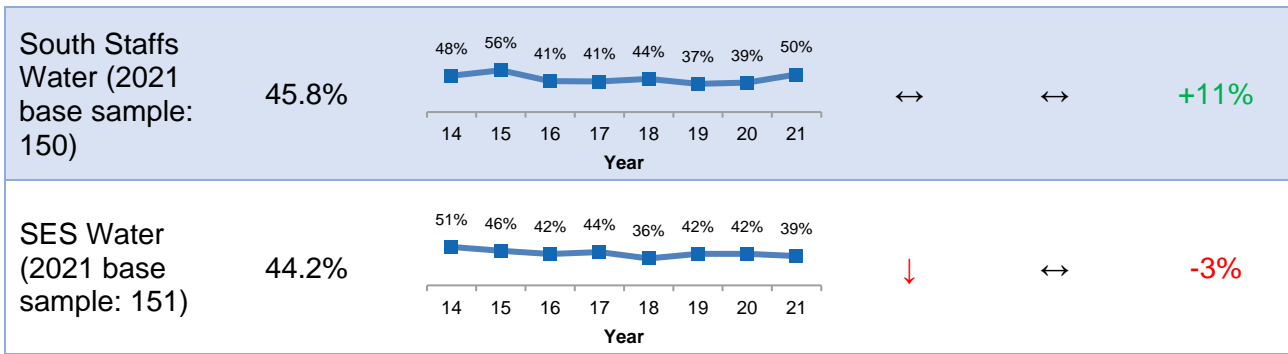
Awareness of Priority services	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	46.8%		↓	n/a	+5%
Total WaSCs (2021 base sample: 3753)	46.7%		↓	n/a	+7%

²¹ Data previously shown from 2011 but removed in 2019 to reflect more accurate trends.

Anglian Water (2021 base sample: 351)	48.9%	<p>Year</p>	↓	↔	+12%
Dŵr Cymru Welsh Water (2021 base sample: 400)	45.2%	<p>Year</p>	↔	↔	+7%
Hafren Dyfrdwy (2021 base sample: 200)	45.3%	<p>Year</p>	↔	↔	+5%
Northumbrian Water (2021 base sample: 200)	45.8%	<p>Year</p>	↔	↔	+10%
Severn Trent (2021 base sample: 200)	47.2%	<p>Year</p>	↔	↔	+10%
South West Water (2021 base sample: 400)	52.2%	<p>Year</p>	↓	↔	+11%
Southern Water (2021 base sample: 401)	44.8%	<p>Year</p>	↓	↔	+8%
Thames Water (2021 base sample: 200)	41.9%	<p>Year</p>	↔	↔	+6%
United Utilities (2021 base sample: 701)	49.5%	<p>Year</p>	↔	↔	+1%
Wessex Water (2021 base sample: 200)	49.4%	<p>Year</p>	↓	↔	+5%
Yorkshire Water (2021 base sample: 500)	47.1%	<p>Year</p>	↓	↔	+5%

Table 19: Awareness of Priority Services – WoCs

Awareness of Priority services	Six-year rolling company average	Six-year company trend	Six-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	46.8%	<p>48% 50% 44% 43% 44% 42% 43% 48%</p> <p>14 15 16 17 18 19 20 21</p> <p>Title</p>	↓	n/a	+5%
Total WoCs (2021 base sample: 1657)	47.4%	<p>50% 52% 43% 44% 46% 43% 47% 45%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	n/a	-2%
Affinity Water Central (2021 base sample: 154)	42.3%	<p>41% 48% 37% 41% 40% 39% 43% 38%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-6%
Affinity Water East (2021 base sample: 150)	50.6%	<p>51% 53% 42% 44% 50% 48% 52% 57%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	+4%
Affinity Water South East (2021 base sample: 150)	49.4%	<p>56% 54% 51% 43% 41% 44% 47% 51%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	+4%
Bristol Water (2021 base sample: 300)	53.4%	<p>55% 53% 52% 48% 52% 44% 55% 57%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	+2%
Cambridge Water (2021 base sample: 150)	50.1%	<p>50% 59% 52% 43% 46% 54% 43% 46%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↔	+3%
Essex & Suffolk Water (2021 base sample: 150)	50.3%	<p>50% 54% 44% 48% 49% 49% 50% 45%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-5%
Portsmouth Water (2021 base sample: 151)	51.2%	<p>49% 54% 49% 51% 51% 48% 47% 56%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	+9%
South East Water (2021 base sample: 151)	47.8%	<p>59% 52% 42% 41% 50% 40% 49% 40%</p> <p>14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↔	-8%



3.3 Awareness of water companies' offer of reduced bills

Prior to 2021, respondents were asked if they are aware of the specific names of any other company specific schemes designed to provide lower charges for customers who struggle to pay their bills. Awareness of the names of the schemes was relatively low, and the question was rephrased this year to “Are you aware that your water company offers reduced bills to some households who, due to their financial circumstances, would sometimes struggle to pay their bills?”, with a simplified yes/no response. Figure 18 shows the proportion of customers who are aware of company specific social tariff schemes at national levels and for England and for Wales. This is followed by Table 20 and Table 21, which show awareness for each WaSC and for each WoC respectively.

Figure 18: Awareness of water companies' offer of reduced bills

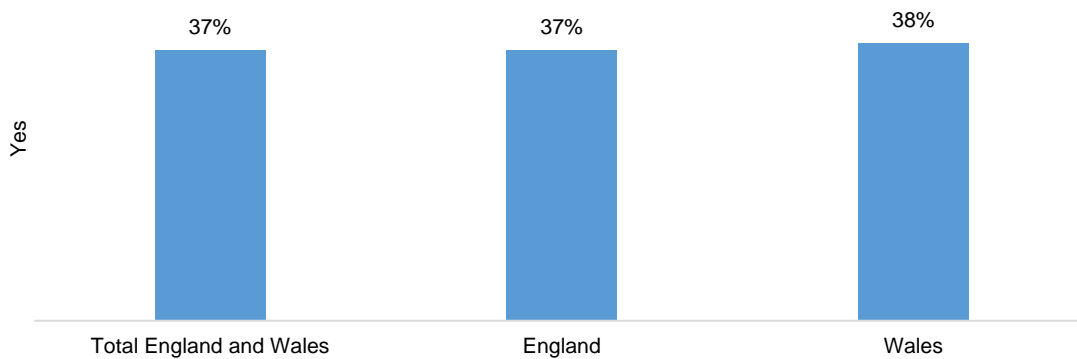


Table 20: Awareness of water companies' offer of reduced bills – WaSCs

Awareness of offer of reduced bills	Yes
Industry (2021 base sample: 4486)	37%
Total WaSCs(2021 base sample: 3304)	36%
Anglian Water (2021 base sample: 348)	44%
Dŵr Cymru Welsh Water (2021 base sample: 398)	38%
Hafren Dyfrdwy (2021 base sample: 200)	37%
Northumbrian Water (2021 base sample: 200)	34%
Severn Trent (2021 base sample: 399)	36%
South West Water (2021 base sample: 399)	44%
Southern Water (2021 base sample: 0) ²²	-
Thames Water (2021 base sample: 158)	34%
United Utilities (2021 base sample: 701)	35%
Wessex Water (2021 base sample: 200)	41%
Yorkshire Water (2021 base sample: 500)	32%

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

Awareness of offer of reduced bills	Yes
Industry (2021 base sample: 4486)	37%
Total WoCs (2021 base sample: 1182)	40%
Affinity Water Central (2021 base sample: 12) ²⁰	25%
Affinity Water East (2021 base sample: 142)	42%
Affinity Water South East (2021 base sample: 149)	50%
Bristol Water (2021 base sample: 300)	41%
Cambridge Water (2021 base sample: 133)	41%
Essex & Suffolk Water (2021 base sample: 146)	39%
Portsmouth Water (2021 base sample: 151)	40%
South East Water (2021 base sample: 0) ²⁰	-
South Staffs Water (2021 base sample: 149)	41%
SES Water (2021 base sample: 0) ²⁰	-

3.4 Awareness of free water meter trial schemes

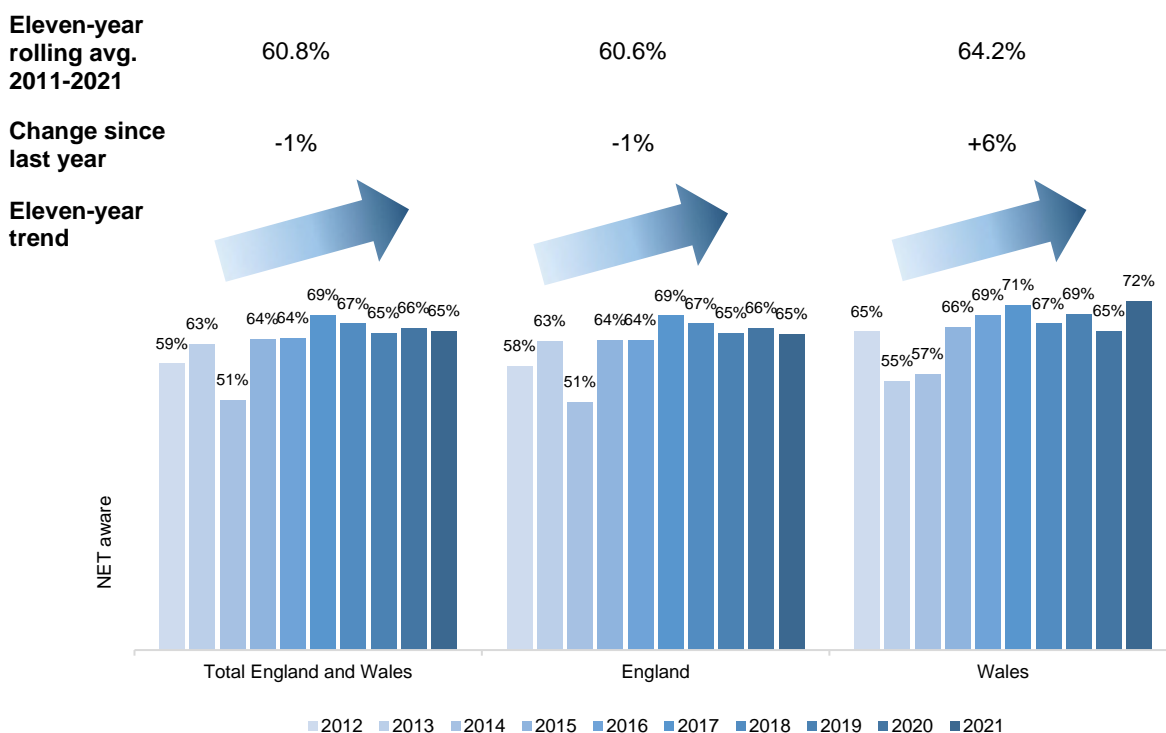
Unless they live in a water company area where universal metering schemes are in place, customers who do not have a water meter at their property can ask their water company to fit a water meter. This would be at no cost to the customer provided the installation is fairly straightforward.

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

²² Due to a routing oversight in the programming phase of the project, some water companies have not been asked this question. Base sizes at a Total level, and for the nations of England and Wales are robust and, therefore, trackability will not be affected at main category levels. Marked companies will be included going forwards.

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

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



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

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

Awareness that water meters can be fitted free of charge	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	60.8%	59% 63% 51% 64% 64% 69% 67% 65% 66% 65%	↑	n/a	-1%
Total WaSCs (2021 base sample: 3753)	60.4%	58% 62% 51% 63% 64% 69% 66% 64% 64% 65%	↑	n/a	↔
Anglian Water (2021 base sample: 351)	66.7%	65% 72% 73% 71% 67% 71% 69% 69% 71% 67%	↑	↔	-4%

Dŵr Cymru Welsh Water (2021 base sample: 400)	64.1%	<p>Year</p>	↑	↑	+7%
Hafren Dyfrdwy (2021 base sample: 200)	69.7%	<p>Year</p>	↔	↔	-3%
Northumbrian Water (2021 base sample: 200)	58.8%	<p>Year</p>	↑	↔	+6%
Severn Trent (2021 base sample: 200)	58.6%	<p>Year</p>	↑	↔	-2%
South West Water (2021 base sample: 400) ²³	75.8%	<p>Year</p>	↔	↑	+13%
Thames Water (2021 base sample: 200)	52.6%	<p>Year</p>	↔	↓	-5%
United Utilities (2021 base sample: 701)	64.5%	<p>Year</p>	↑	↑	+5%
Wessex Water (2021 base sample: 200)	66.5%	<p>Year</p>	↑	↔	-12%
Yorkshire Water (2021 base sample: 500)	59.7%	<p>Year</p>	↑	↔	-3%

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

²³ Percentage changes for lower base sizes do tend to be more noticeable even if only one or two respondents have a different response to previous data. Please consider this when interpreting results.

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

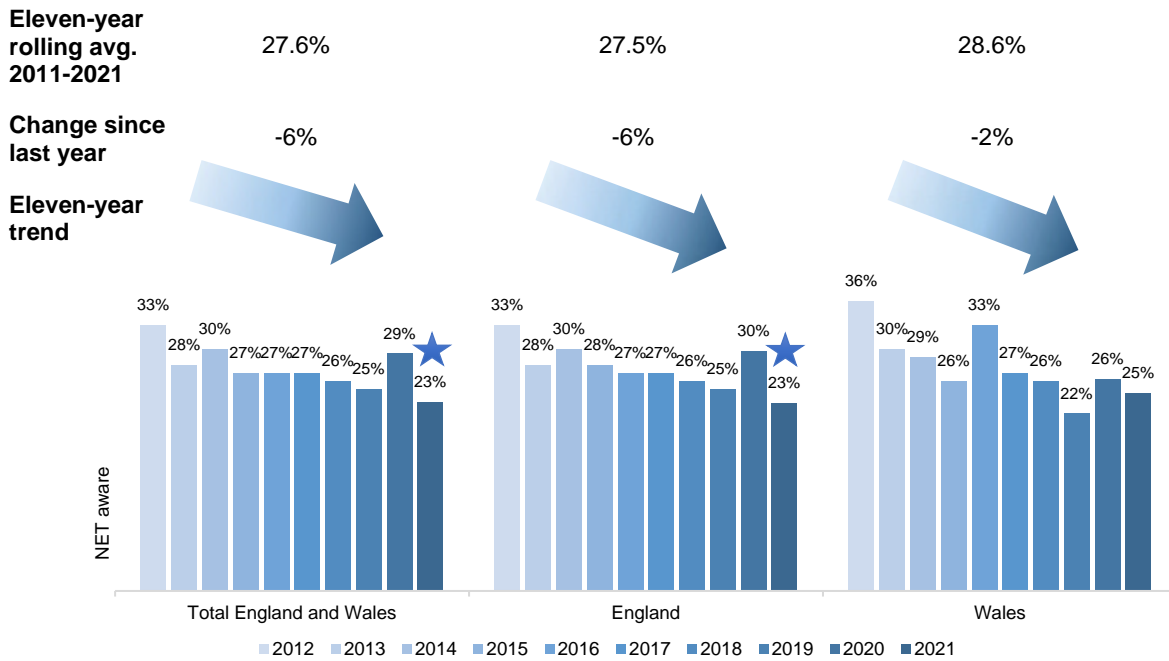
Awareness that water meters can be fitted free of charge	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year																						
Industry (2021 base sample: 5410)	60.8%	<table border="1"> <caption>Industry Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>59%</td><td>63%</td><td>51%</td><td>64%</td><td>64%</td><td>69%</td><td>67%</td><td>65%</td><td>66%</td><td>65%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	59%	63%	51%	64%	64%	69%	67%	65%	66%	65%	↑	n/a	-1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	59%	63%	51%	64%	64%	69%	67%	65%	66%	65%																	
Total WoCs (2021 base sample: 1657)	62.6%	<table border="1"> <caption>Total WoCs Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>63%</td><td>67%</td><td>52%</td><td>65%</td><td>64%</td><td>69%</td><td>72%</td><td>68%</td><td>74%</td><td>71%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	63%	67%	52%	65%	64%	69%	72%	68%	74%	71%	↑	n/a	-3%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	63%	67%	52%	65%	64%	69%	72%	68%	74%	71%																	
Affinity Water Central (2021 base sample: 154)	58.0%	<table border="1"> <caption>Affinity Water Central Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>64%</td><td>69%</td><td>50%</td><td>59%</td><td>53%</td><td>65%</td><td>66%</td><td>65%</td><td>77%</td><td>75%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	64%	69%	50%	59%	53%	65%	66%	65%	77%	75%	↑	↔	-2%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	64%	69%	50%	59%	53%	65%	66%	65%	77%	75%																	
Affinity Water East (2021 base sample: 150)	65.0%	<table border="1"> <caption>Affinity Water East Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>61%</td><td>76%</td><td>60%</td><td>62%</td><td>56%</td><td>67%</td><td>70%</td><td>78%</td><td>73%</td><td>67%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	61%	76%	60%	62%	56%	67%	70%	78%	73%	67%	↔	↔	-7%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	61%	76%	60%	62%	56%	67%	70%	78%	73%	67%																	
Bristol Water (2021 base sample: 300)	66.7%	<table border="1"> <caption>Bristol Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>67%</td><td>70%</td><td>58%</td><td>72%</td><td>66%</td><td>70%</td><td>70%</td><td>75%</td><td>79%</td><td>77%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	67%	70%	58%	72%	66%	70%	70%	75%	79%	77%	↑	↔	-2%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	67%	70%	58%	72%	66%	70%	70%	75%	79%	77%																	
Cambridge Water (2021 base sample: 150)	62.7%	<table border="1"> <caption>Cambridge Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>54%</td><td>59%</td><td>53%</td><td>69%</td><td>65%</td><td>60%</td><td>73%</td><td>63%</td><td>73%</td><td>75%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	54%	59%	53%	69%	65%	60%	73%	63%	73%	75%	↑	↔	+2%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	54%	59%	53%	69%	65%	60%	73%	63%	73%	75%																	
Essex & Suffolk Water (2021 base sample: 150)	67.6%	<table border="1"> <caption>Essex & Suffolk Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>67%</td><td>70%</td><td>63%</td><td>75%</td><td>76%</td><td>69%</td><td>76%</td><td>64%</td><td>77%</td><td>63%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	67%	70%	63%	75%	76%	69%	76%	64%	77%	63%	↑	↔	-14%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	67%	70%	63%	75%	76%	69%	76%	64%	77%	63%																	
Portsmouth Water (2021 base sample: 151)	61.4%	<table border="1"> <caption>Portsmouth Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>46%</td><td>62%</td><td>44%</td><td>63%</td><td>65%</td><td>72%</td><td>73%</td><td>71%</td><td>69%</td><td>74%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	46%	62%	44%	63%	65%	72%	73%	71%	69%	74%	↑	↔	+5%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	46%	62%	44%	63%	65%	72%	73%	71%	69%	74%																	
South Staffs Water (2021 base sample: 150)	61.9%	<table border="1"> <caption>South Staffs Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Percentage</th><td>64%</td><td>63%</td><td>43%</td><td>62%</td><td>63%</td><td>70%</td><td>73%</td><td>64%</td><td>71%</td><td>70%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	64%	63%	43%	62%	63%	70%	73%	64%	71%	70%	↑	↔	-2%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	64%	63%	43%	62%	63%	70%	73%	64%	71%	70%																	

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

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

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

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



★ Significant difference between 2020 and 2021 data

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

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

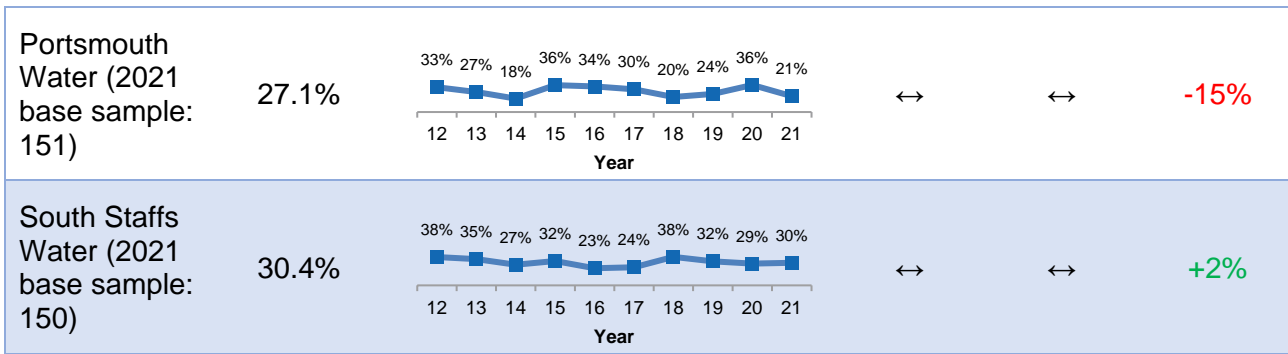
Awareness of the 24-month trial period for a water meter	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year																						
Industry (2021 base sample: 5410)	27.6%	<table border="1"> <caption>Industry Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>33</td><td>28</td><td>30</td><td>27</td><td>27</td><td>27</td><td>26</td><td>25</td><td>29</td><td>23</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	33	28	30	27	27	27	26	25	29	23	↓	n/a	-6%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	33	28	30	27	27	27	26	25	29	23																	
Total WaSCs (2021 base sample: 3753)	27.5%	<table border="1"> <caption>Total WaSCs Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>33</td><td>28</td><td>30</td><td>28</td><td>27</td><td>28</td><td>26</td><td>24</td><td>30</td><td>23</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	33	28	30	28	27	28	26	24	30	23	↓	n/a	-7%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	33	28	30	28	27	28	26	24	30	23																	
Anglian Water (2021 base sample: 351)	37.4%	<table border="1"> <caption>Anglian Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>44</td><td>45</td><td>46</td><td>31</td><td>45</td><td>30</td><td>33</td><td>32</td><td>45</td><td>30</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	44	45	46	31	45	30	33	32	45	30	↔	↔	-15%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	44	45	46	31	45	30	33	32	45	30																	
Dŵr Cymru Welsh Water (2021 base sample: 400)	28.7%	<table border="1"> <caption>Dŵr Cymru Welsh Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>37</td><td>29</td><td>30</td><td>26</td><td>34</td><td>27</td><td>26</td><td>22</td><td>26</td><td>24</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	37	29	30	26	34	27	26	22	26	24	↓	↔	-2%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	37	29	30	26	34	27	26	22	26	24																	
Hafren Dyfrdwy (2021 base sample: 200)	26.8%	<table border="1"> <caption>Hafren Dyfrdwy Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>30</td><td>31</td><td>23</td><td>24</td><td>34</td><td>28</td><td>20</td><td>21</td><td>23</td><td>23</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	30	31	23	24	34	28	20	21	23	23	↔	↔	+6%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	30	31	23	24	34	28	20	21	23	23																	
Northumbrian Water (2021 base sample: 200)	25.3%	<table border="1"> <caption>Northumbrian Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>30</td><td>26</td><td>26</td><td>23</td><td>17</td><td>20</td><td>20</td><td>21</td><td>26</td><td>20</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	30	26	26	23	17	20	20	21	26	20	↓	↔	-6%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	30	26	26	23	17	20	20	21	26	20																	
South West Water (2021 base sample: 400)	38.5%	<table border="1"> <caption>South West Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>57</td><td>52</td><td>42</td><td>48</td><td>40</td><td>36</td><td>35</td><td>25</td><td>33</td><td>25</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	57	52	42	48	40	36	35	25	33	25	↓	↔	-8%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	57	52	42	48	40	36	35	25	33	25																	
Thames Water (2021 base sample: 200)	23.1%	<table border="1"> <caption>Thames Water Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>28</td><td>20</td><td>25</td><td>28</td><td>26</td><td>24</td><td>27</td><td>15</td><td>27</td><td>11</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	28	20	25	28	26	24	27	15	27	11	↔	↓	-16%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	28	20	25	28	26	24	27	15	27	11																	
United Utilities (2021 base sample: 701)	30.9%	<table border="1"> <caption>United Utilities Awareness Data (2012-2021)</caption> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Awareness (%)</th><td>35</td><td>31</td><td>36</td><td>32</td><td>27</td><td>37</td><td>27</td><td>31</td><td>32</td><td>30</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Awareness (%)	35	31	36	32	27	37	27	31	32	30	↔	↑	-2%
Year	12	13	14	15	16	17	18	19	20	21																	
Awareness (%)	35	31	36	32	27	37	27	31	32	30																	

Wessex Water (2021 base sample: 200)	31.6%		↔	↔	-5%
Yorkshire Water (2021 base sample: 500)	27.6%		↔	↔	-6%

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

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

Awareness of the 24-month trial period for a water meter	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	27.6%		↓	n/a	-6%
Total WoCs (2021 base sample: 1657)	27.7%		↔	n/a	-3%
Affinity Water Central (2021 base sample: 154)	26.4%		↓	↓	-15%
Affinity Water East (2021 base sample: 150)	30.2%		↓	↔	-12%
Bristol Water (2021 base sample: 300)	29.2%		↔	↔	+3%
Cambridge Water (2021 base sample: 150)	26.4%		↔	↔	+1%
Essex & Suffolk Water (2021 base sample: 150)	27.9%		↔	↔	-15%

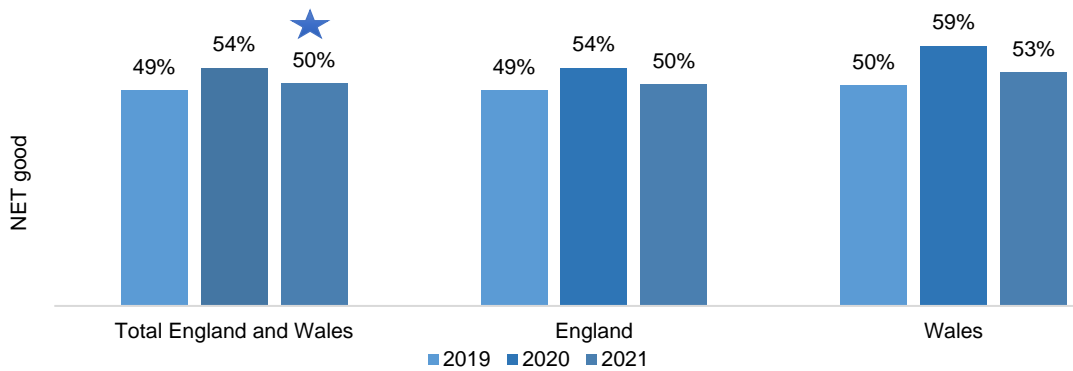


Footnote: All customers of South East Water and Affinity Water South East, as well as some customers of Affinity Water Central and Affinity Water East were excluded from this question because of the companies' compulsory metering schemes

3.6 Communication about services, plans and additional services

A new question was added in 2019 to understand perceptions about how well water companies communicate about their services and plans, and availability of things such as WaterSure and Priority/additional services. Figure 21 shows national level data, and Table 26 and Table 27 show this for each WaSC and for each WoC respectively.

Figure 21: Perceptions of communications from water companies about services and plans²⁴



★ Significant difference between 2020 and 2021 data

²⁴ Trend data not available – only have data for 2 years

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

NET good	Two-year company trend NET Good	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	<p>49% 54% 50%</p> <p>19 20 21</p> <p>Year</p>	n/a	-4%
Total WaSCs (2021 base sample: 3753)	<p>49% 55% 51%</p> <p>19 20 21</p> <p>Year</p>	n/a	-4%
Anglian Water (2021 base sample: 351)	<p>49% 55% 59%</p> <p>19 20 21</p> <p>Year</p>	↔	+4%
Dŵr Cymru Welsh Water (2021 base sample: 400)	<p>50% 60% 53%</p> <p>19 20 21</p> <p>Year</p>	↔	-6%
Hafren Dyfrdwy (2021 base sample: 200)	<p>52% 50% 50%</p> <p>19 20 21</p> <p>Year</p>	↔	0%
Northumbrian Water (2021 base sample: 200)	<p>61% 52% 52%</p> <p>19 20 21</p> <p>Year</p>	↔	+1%
Severn Trent (2021 base sample: 200)	<p>50% 58% 46%</p> <p>19 20 21</p> <p>Year</p>	↔	-12%
South West Water (2021 base sample: 400)	<p>50% 62% 54%</p> <p>19 20 21</p> <p>Year</p>	↔	-8%
Southern Water (2021 base sample: 401)	<p>41% 44% 49%</p> <p>19 20 21</p> <p>Year</p>	↔	+5%
Thames Water (2021 base sample: 200)	<p>39% 50% 45%</p> <p>19 20 21</p> <p>Year</p>	↔	-5%

United Utilities (2021 base sample: 701)		↔	-4%
Wessex Water (2021 base sample: 200)		↔	-6%
Yorkshire Water (2021 base sample: 500)		↔	-4%

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

NET good	Two-year company trend NET Good	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)		n/a	-4%
Total WoCs (2021 base sample: 1657)		n/a	-2%
Affinity Water Central (2021 base sample: 154)		↔	+5%
Affinity Water East (2021 base sample: 150)		↔	+4%
Affinity Water South East (2021 base sample: 150)		↔	+1%
Bristol Water (2021 base sample: 300)		↔	-4%

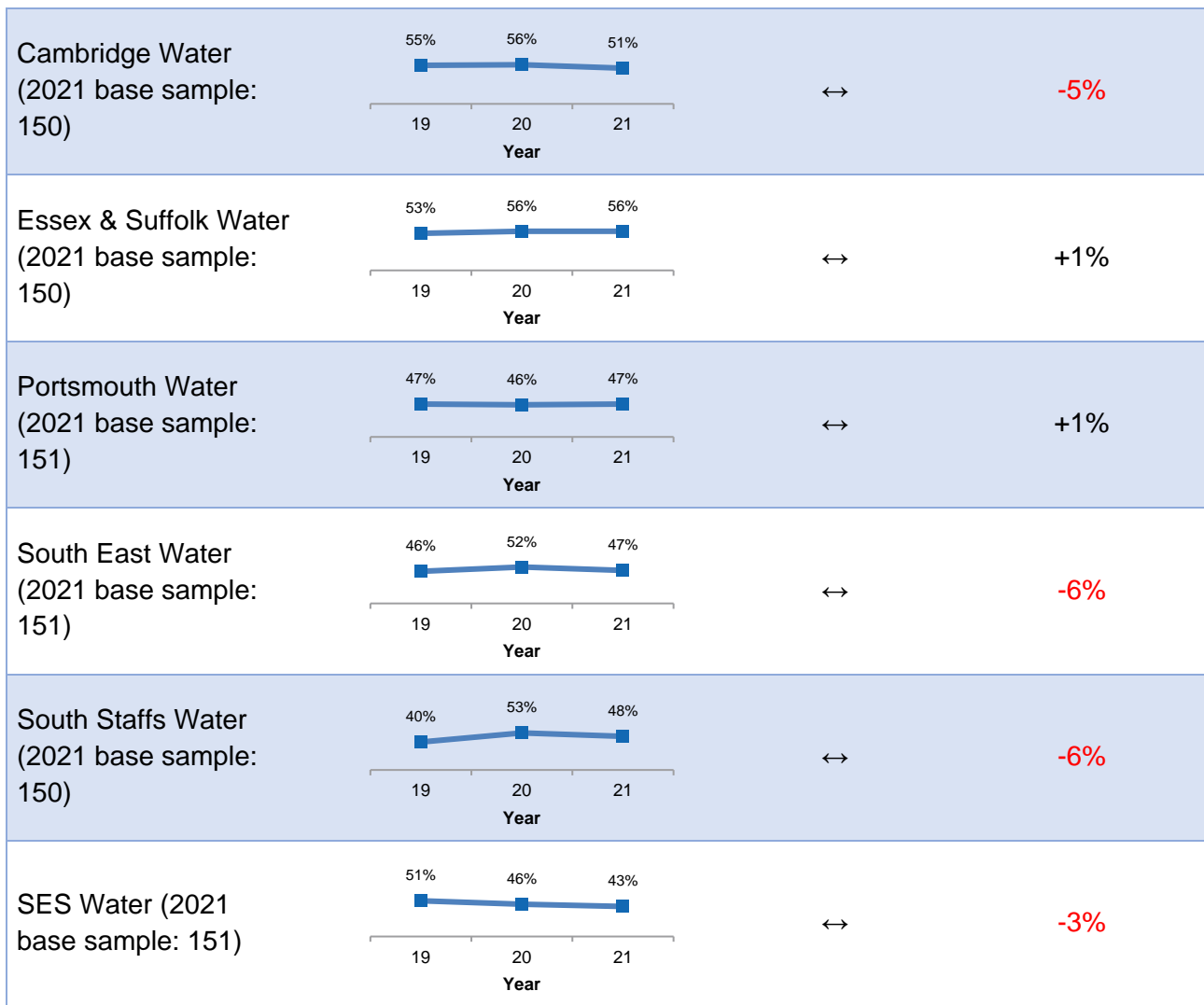
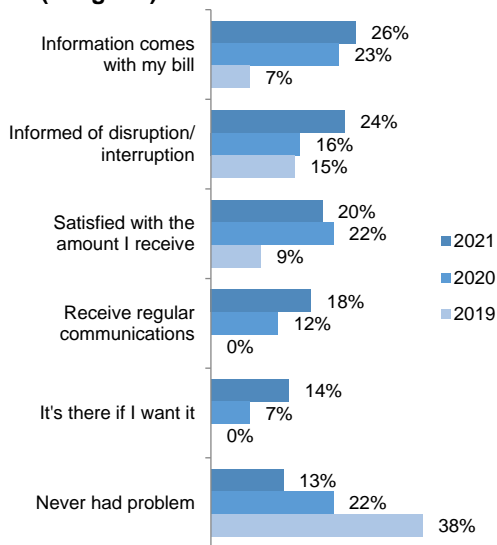


Figure 22 details the main reasons (unprompted) why respondents gave their rating, with the main positive and negative comments shown at a total level.

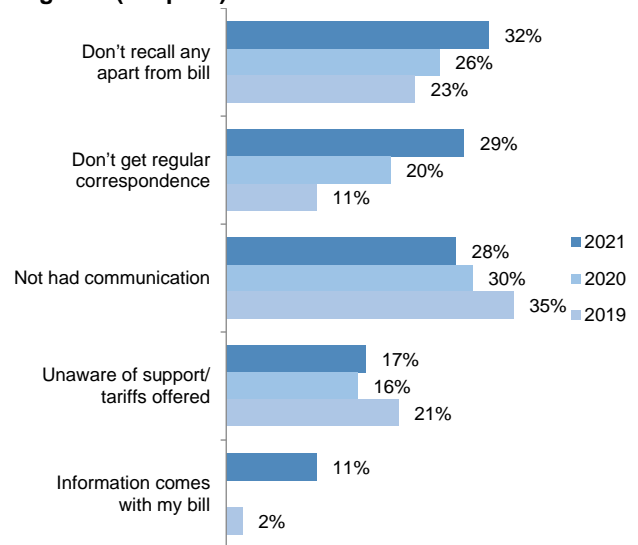
Figure 22 Reasons for rating how well communicate on services and plans

Positive (net good)



*All others mentioned by less than 5%

Negative (net poor)



*All others mentioned by less than 10%

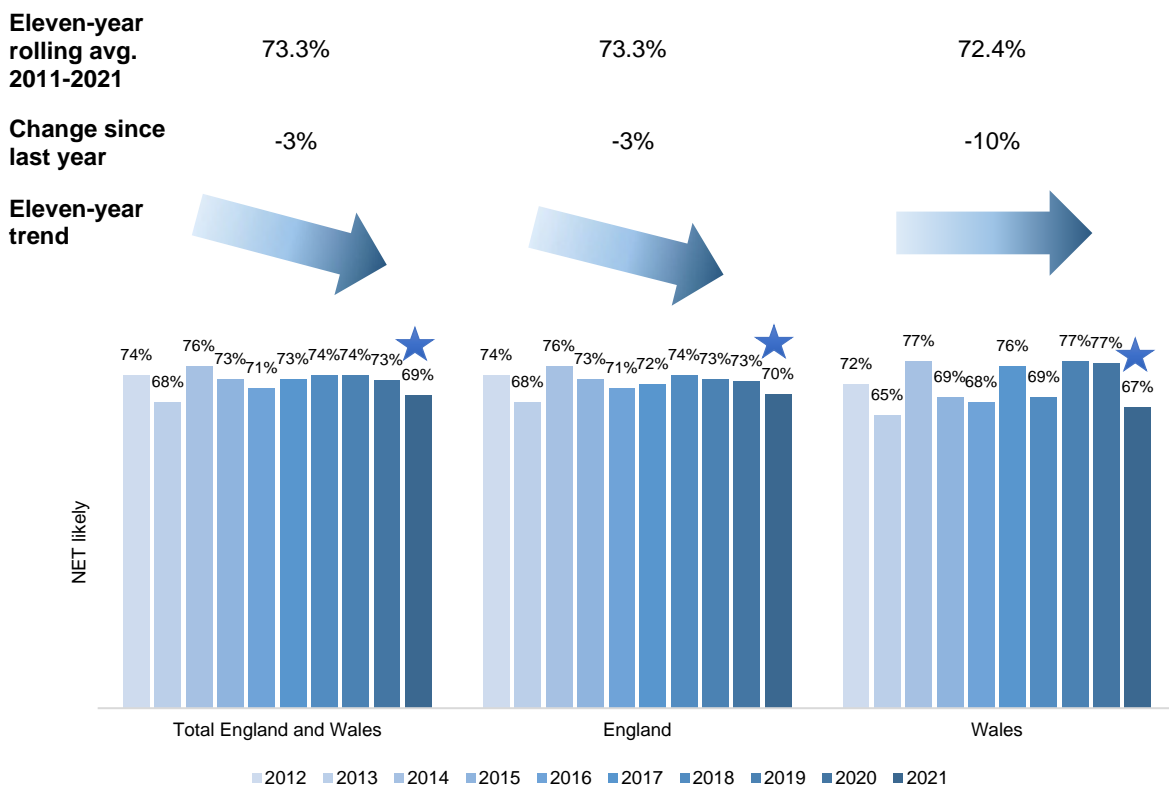
Chapter 4: Contacting water companies and satisfaction with customer service

This chapter presents views on customer contact with their water/sewerage company. Questions range from the likelihood of making contact where worried about a bill, to satisfaction with any contact made in the 12 months prior to this survey, identifying the reason for contact and satisfaction with elements of the contact and overall satisfaction with customer services in general.

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

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

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



★ Significant difference between 2020 and 2021 data

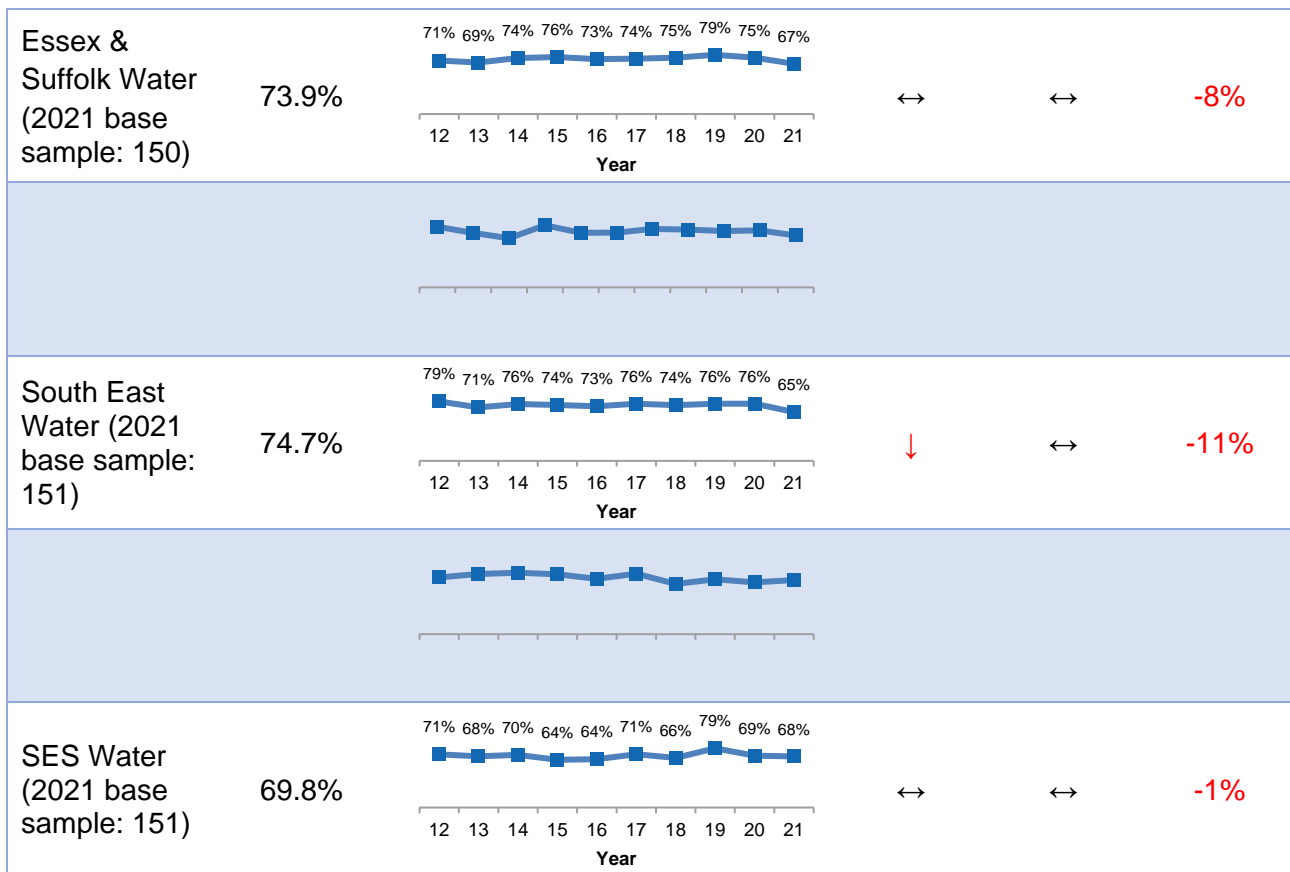
Table 28: Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

Likely to contact if worried about bill	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year																							
Industry (2021 base sample: 5410)	73.3%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>74%</td><td>68%</td><td>76%</td><td>73%</td><td>71%</td><td>73%</td><td>74%</td><td>74%</td><td>73%</td><td>69%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	74%	68%	76%	73%	71%	73%	74%	74%	73%	69%	↓	n/a	-3%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	74%	68%	76%	73%	71%	73%	74%	74%	73%	69%																		
Total WaSCs (2021 base sample: 3753)	73.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>74%</td><td>67%</td><td>76%</td><td>72%</td><td>71%</td><td>72%</td><td>74%</td><td>73%</td><td>73%</td><td>70%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	74%	67%	76%	72%	71%	72%	74%	73%	73%	70%	↓	n/a	-3%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	74%	67%	76%	72%	71%	72%	74%	73%	73%	70%																		
Anglian Water (2021 base sample: 351)	75.5%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>73%</td><td>68%</td><td>78%</td><td>77%</td><td>74%</td><td>72%</td><td>77%</td><td>74%</td><td>78%</td><td>74%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	73%	68%	78%	77%	74%	72%	77%	74%	78%	74%	↑	↔	-4%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	73%	68%	78%	77%	74%	72%	77%	74%	78%	74%																		
Dŵr Cymru Welsh Water (2021 base sample: 400)	72.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>72%</td><td>64%</td><td>77%</td><td>68%</td><td>68%</td><td>76%</td><td>68%</td><td>78%</td><td>77%</td><td>67%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	72%	64%	77%	68%	68%	76%	68%	78%	77%	67%	↔	↔	-10%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	72%	64%	77%	68%	68%	76%	68%	78%	77%	67%																		
Hafren Dyfrdwy (2021 base sample: 200)	72.8%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>72%</td><td>64%</td><td>77%</td><td>68%</td><td>68%</td><td>76%</td><td>68%</td><td>80%</td><td>72%</td><td>74%</td><td>66%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	72%	64%	77%	68%	68%	76%	68%	80%	72%	74%	66%	↔	↔	-8%
Year	12	13	14	15	16	17	18	19	20	21																		
Value	72%	64%	77%	68%	68%	76%	68%	80%	72%	74%	66%																	
Northumbrian Water (2021 base sample: 200)	72.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>69%</td><td>67%</td><td>77%</td><td>67%</td><td>75%</td><td>71%</td><td>69%</td><td>71%</td><td>78%</td><td>68%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	69%	67%	77%	67%	75%	71%	69%	71%	78%	68%	↔	↔	-11%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	69%	67%	77%	67%	75%	71%	69%	71%	78%	68%																		
Severn Trent (2021 base sample: 200)	74.2%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>77%</td><td>70%</td><td>78%</td><td>75%</td><td>71%</td><td>75%</td><td>67%</td><td>76%</td><td>73%</td><td>71%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	77%	70%	78%	75%	71%	75%	67%	76%	73%	71%	↓	↔	-2%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	77%	70%	78%	75%	71%	75%	67%	76%	73%	71%																		
South West Water (2021 base sample: 400)	74.9%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>81%</td><td>74%</td><td>75%</td><td>74%</td><td>69%</td><td>80%</td><td>73%</td><td>73%</td><td>77%</td><td>67%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	81%	74%	75%	74%	69%	80%	73%	73%	77%	67%	↓	↔	-10%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	81%	74%	75%	74%	69%	80%	73%	73%	77%	67%																		
Southern Water (2021 base sample: 401)	75.4%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>78%</td><td>73%</td><td>81%</td><td>77%</td><td>65%</td><td>72%</td><td>79%</td><td>76%</td><td>71%</td><td>70%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	78%	73%	81%	77%	65%	72%	79%	76%	71%	70%	↓	↔	-1%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	78%	73%	81%	77%	65%	72%	79%	76%	71%	70%																		
Thames Water (2021 base sample: 200)	70.6%	<table border="1"> <tr><th>Year</th><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><th>Value</th><td>75%</td><td>62%</td><td>72%</td><td>68%</td><td>72%</td><td>65%</td><td>79%</td><td>68%</td><td>64%</td><td>72%</td></tr> </table>	Year	12	13	14	15	16	17	18	19	20	21	Value	75%	62%	72%	68%	72%	65%	79%	68%	64%	72%	↓	↔	+7%	
Year	12	13	14	15	16	17	18	19	20	21																		
Value	75%	62%	72%	68%	72%	65%	79%	68%	64%	72%																		

United Utilities (2021 base sample: 701)	72.6%		↔	↔	-8%
Wessex Water (2021 base sample: 200)	76.1%		↓	↔	-6%
Yorkshire Water (2021 base sample: 500)	73.6%		↔	↔	-2%

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

Likely to contact if worried about bill	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	73.3%		↓	n/a	-3%
Total WoCs (2021 base sample: 1657)	73.3%		↓	n/a	-5%
Affinity Water Central (2021 base sample: 154)	71.0%		↔	↔	↔
Affinity Water East (2021 base sample: 150)	73.5%		↓	↔	-5%
Affinity Water South East (2021 base sample: 150)	72.9%		↓	↔	-7%
Bristol Water (2021 base sample: 300)	73.1%		↓	↔	-10%
Cambridge Water (2021 base sample: 150)	72.9%		↔	↔	-3%



4.2 Prevalence of customers contacting their water company

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

Table 30, and for each WoC in Table 31.

Figure 24: Contact with the water/sewerage company

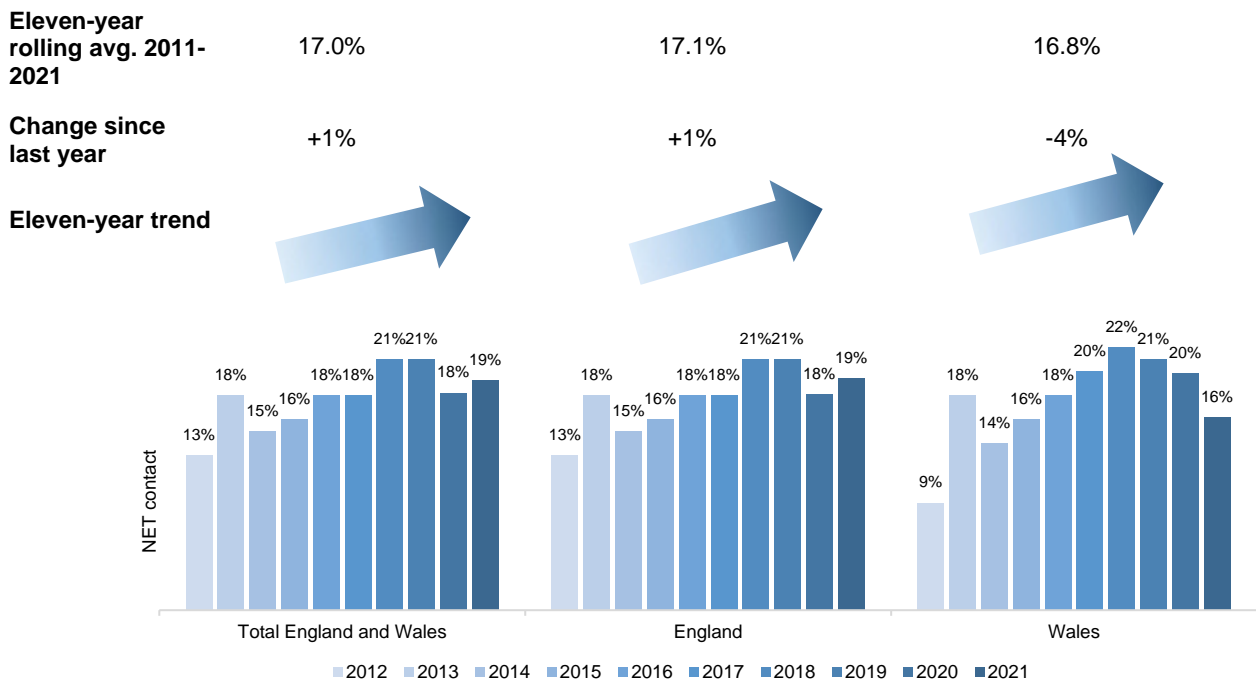


Table 30: Contact with the water/sewerage company - WaSCs

Contact with your water and/or sewerage company	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year																						
Industry (2021 base sample: 5410)	17.0%	<table border="1"> <caption>Industry Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>13%</td><td>18%</td><td>15%</td><td>16%</td><td>18%</td><td>18%</td><td>21%</td><td>21%</td><td>18%</td><td>19%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	13%	18%	15%	16%	18%	18%	21%	21%	18%	19%	↑	n/a	1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	13%	18%	15%	16%	18%	18%	21%	21%	18%	19%																	
Total WaSCs (2021 base sample: 3753)	17.1%	<table border="1"> <caption>Total WaSCs Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>13%</td><td>17%</td><td>15%</td><td>17%</td><td>18%</td><td>18%</td><td>22%</td><td>20%</td><td>18%</td><td>19%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	13%	17%	15%	17%	18%	18%	22%	20%	18%	19%	↑	19%	1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	13%	17%	15%	17%	18%	18%	22%	20%	18%	19%																	
Anglian Water (2021 base sample: 351)	19.0%	<table border="1"> <caption>Anglian Water Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>17%</td><td>23%</td><td>17%</td><td>22%</td><td>18%</td><td>18%</td><td>21%</td><td>21%</td><td>16%</td><td>20%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	17%	23%	17%	22%	18%	18%	21%	21%	16%	20%	↔	↔	4%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	17%	23%	17%	22%	18%	18%	21%	21%	16%	20%																	
Dŵr Cymru Welsh Water (2021 base sample: 400)	16.6%	<table border="1"> <caption>Dŵr Cymru Welsh Water Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>9%</td><td>17%</td><td>14%</td><td>15%</td><td>18%</td><td>20%</td><td>22%</td><td>20%</td><td>20%</td><td>16%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	9%	17%	14%	15%	18%	20%	22%	20%	20%	16%	↑	↔	-4%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	9%	17%	14%	15%	18%	20%	22%	20%	20%	16%																	
Hafren Dyfrdwy (2021 base sample: 200)	21.3%	<table border="1"> <caption>Hafren Dyfrdwy Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td></td><td></td><td></td><td></td><td></td><td></td><td>23%</td><td>25%</td><td>19%</td><td>18%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage							23%	25%	19%	18%	↔	↔	-1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage							23%	25%	19%	18%																	
Northumbrian Water (2021 base sample: 200)	14.6%	<table border="1"> <caption>Northumbrian Water Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>12%</td><td>17%</td><td>9%</td><td>14%</td><td>16%</td><td>15%</td><td>20%</td><td>22%</td><td>13%</td><td>18%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	12%	17%	9%	14%	16%	15%	20%	22%	13%	18%	↑	↔	5%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	12%	17%	9%	14%	16%	15%	20%	22%	13%	18%																	
Severn Trent (2021 base sample: 200)	15.7%	<table border="1"> <caption>Severn Trent Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>13%</td><td>14%</td><td>13%</td><td>14%</td><td>16%</td><td>20%</td><td>20%</td><td>19%</td><td>18%</td><td>17%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	13%	14%	13%	14%	16%	20%	20%	19%	18%	17%	↑	↔	-1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	13%	14%	13%	14%	16%	20%	20%	19%	18%	17%																	
South West Water (2021 base sample: 400)	20.2%	<table border="1"> <caption>South West Water Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>16%</td><td>24%</td><td>20%</td><td>22%</td><td>24%</td><td>18%</td><td>27%</td><td>24%</td><td>15%</td><td>22%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	16%	24%	20%	22%	24%	18%	27%	24%	15%	22%	↑	↔	7%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	16%	24%	20%	22%	24%	18%	27%	24%	15%	22%																	
Southern Water (2021 base sample: 401)	18.2%	<table border="1"> <caption>Southern Water Contact Data</caption> <thead> <tr><th>Year</th><th>12</th><th>13</th><th>14</th><th>15</th><th>16</th><th>17</th><th>18</th><th>19</th><th>20</th><th>21</th></tr> </thead> <tbody> <tr><td>Percentage</td><td>11%</td><td>19%</td><td>14%</td><td>26%</td><td>26%</td><td>19%</td><td>23%</td><td>18%</td><td>16%</td><td>18%</td></tr> </tbody> </table>	Year	12	13	14	15	16	17	18	19	20	21	Percentage	11%	19%	14%	26%	26%	19%	23%	18%	16%	18%	↔	↔	1%
Year	12	13	14	15	16	17	18	19	20	21																	
Percentage	11%	19%	14%	26%	26%	19%	23%	18%	16%	18%																	

Thames Water (2021 base sample: 200)	18.6%		↑	↑	0%
United Utilities (2021 base sample: 701)	15.4%		↑	↔	2%
Wessex Water (2021 base sample: 200)	17.0%		↑	↔	-3%
Yorkshire Water (2021 base sample: 500)	17.3%		↑	↔	-2%

Table 31: Contact with the water company – WoCs

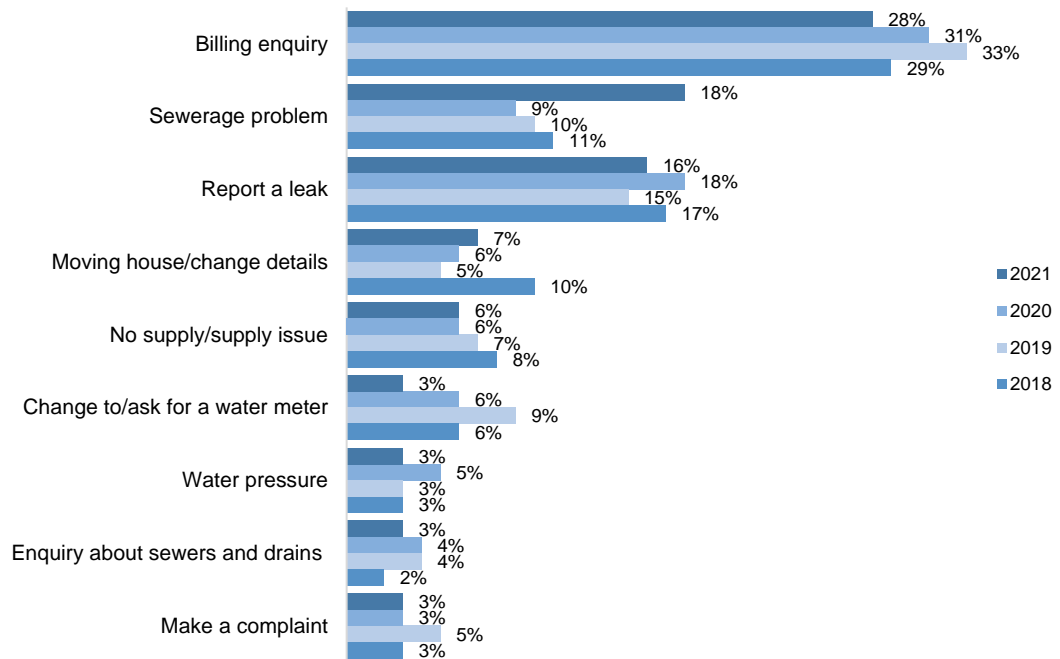
Contact with your water and/or sewerage company	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	17.0%		↑	n/a	1%
Total WoCs (2021 base sample: 1657)	16.8%		↑	19%	2%
Affinity Water Central (2021 base sample: 154)	17.9%		↑	↑	8%
Affinity Water East (2021 base sample: 150)	16.0%		↑	↓	-4%
Affinity Water South East (2021 base sample: 150)	18.8%		↔	↔	3%

Bristol Water (2021 base sample: 300)	15.6%		↑	↔	-2%
Cambridge Water (2021 base sample: 150)	17.5%		↑	↔	-3%
Essex & Suffolk Water (2021 base sample: 150)	16.7%		↑	↔	1%
Portsmouth Water (2021 base sample: 150)	15.3%		↑	↓	-4%
South East Water (2021 base sample: 151)	18.6%		↑	↔	-1%
South Staffs Water (2021 base sample: 150)	14.3%		↑	↔	6%
SES Water (2021 base sample: 151)	15.6%		↑	↔	1%

4.3 Reason for making contact with the water company

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

Figure 25: Reason for contact



Footnote: Reasons for contact below 3% for 2021, are not shown.

4.4 Satisfaction with different aspects of contact

Respondents who made contact in the last 12 months were asked to rate their satisfaction with five different aspects of contact handling – ease of contact, quality of information, knowledge of staff, the feeling that the contact would be resolved and how well the company kept them informed of progress. Figure 26 and Figure 27 show national trends for the last eleven years for each aspect of contact. This is followed by Figure 28 which compares 2021 satisfaction between England and Wales, and Table 33 which show 2021 satisfaction with aspects of service for each WaSC and each WoC respectively, and Table 34 and Table 35 which highlight the eleven-year trends by WaSC and by WoC.

Figure 26: Satisfaction with aspects of contact



Figure 27: Satisfaction with aspects of contact

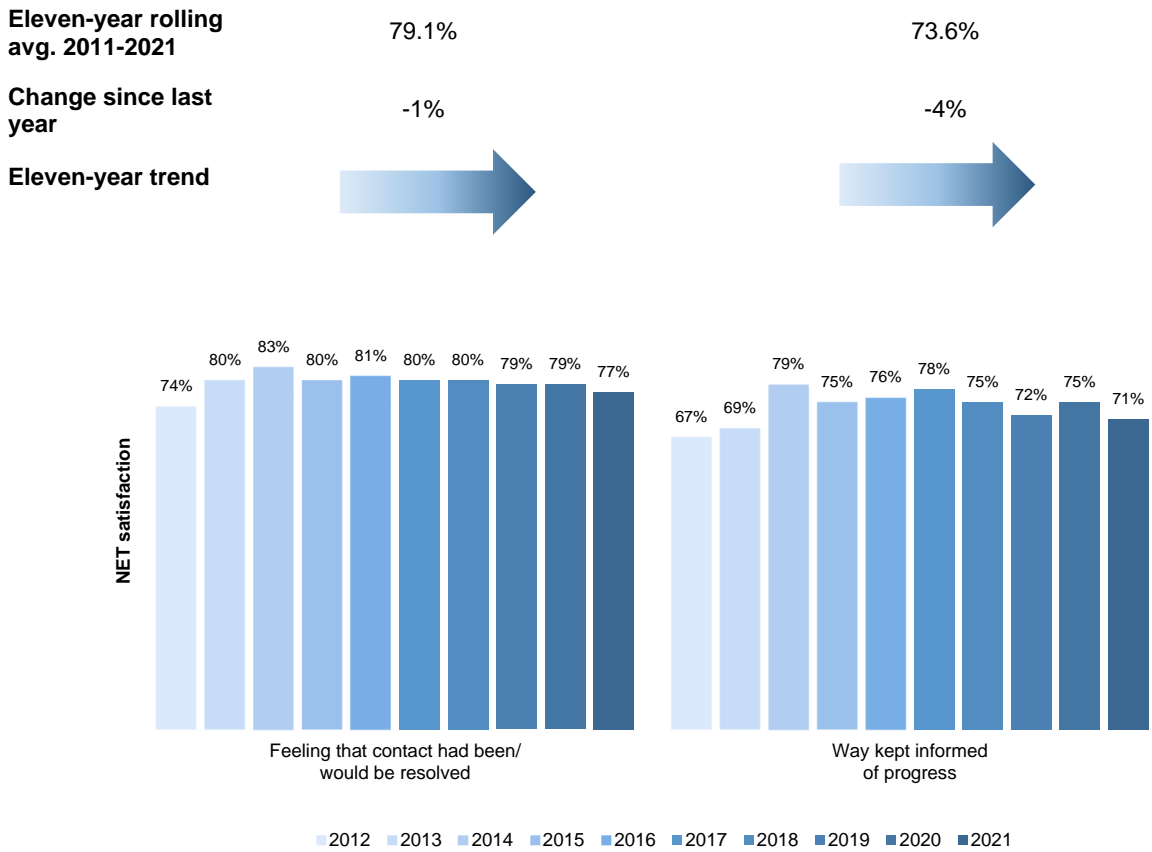


Figure 28: Satisfaction with aspects of contact by nation.

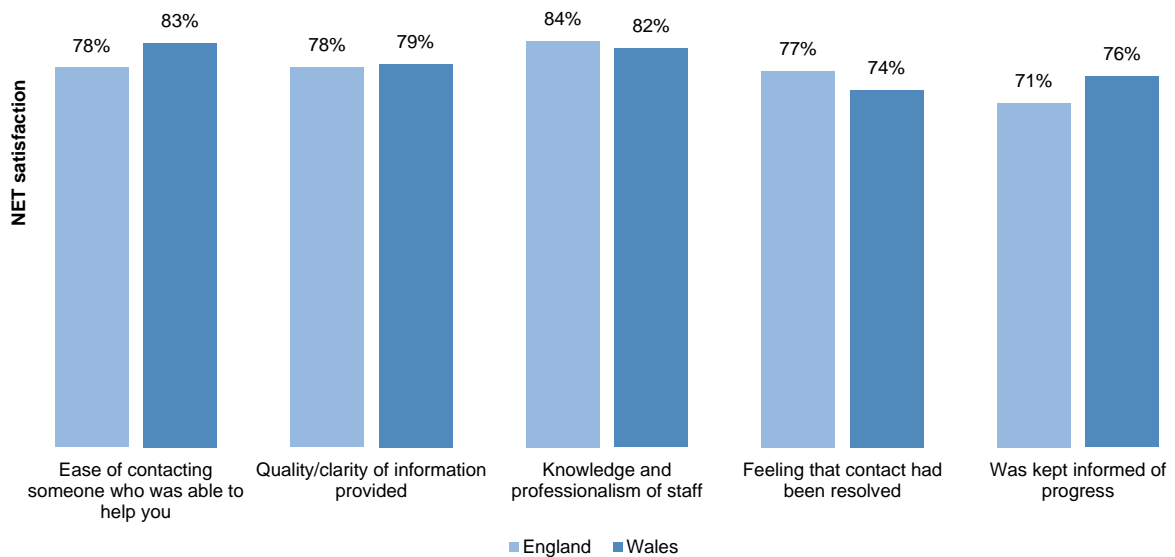


Table 32: Satisfaction with aspects of contact in 2021 – WaSCs

Satisfaction with aspects of contact (2021 data only)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professionalism of staff	Feeling that contact had been / would be resolved	Was kept informed of progress
Industry (2021 base range: 874-954)	78%	78%	84%	77%	71%
Total WaSCs (2021 base range: 624-676)	78%	78%	84%	78%	72%
Anglian Water (2021 base range: 66-69)	90%	91%	94%	91%	89%
Dŵr Cymru Welsh Water (2021 base range: 56-63)	84%	79%	82%	74%	77%
Hafren Dyfrdwy (2021 base range: 31-36)	71%	78%	88%	71%	71%
Northumbrian Water (2021 base range: 31-33)	76%	76%	78%	68%	61%
Severn Trent (2021 base range: 29-34)	82%	76%	85%	85%	79%
South West Water (2021 base range: 79-88)	76%	80%	80%	78%	66%
Southern Water (2021 base range: 63-67)	73%	70%	84%	74%	53%
Thames Water (2021 base range: 46-50)	66%	71%	82%	71%	65%
United Utilities (2021 base range: 121-129)	82%	81%	82%	77%	74%
Wessex Water (2021 base range: 30-34)	88%	85%	85%	82%	77%
Yorkshire Water (2021 base range: 71-75)	80%	81%	81%	77%	69%

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

Table 33: Satisfaction with aspects of contact 2021 – WoCs

Satisfaction with aspects of contact (2021 data only)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professionalism of staff	Feeling that contact had been / would be resolved	Was kept informed of progress
Industry (2021 base range: 874-954)	78%	78%	84%	77%	71%
Total WoCs (2021 base range: 250-278)	80%	78%	83%	75%	68%
Affinity Water Central (2021 base range: 35-41)	76%	73%	83%	71%	63%
Affinity Water East (2021 base range: 17-18)	72%	72%	83%	89%	71%
Affinity Water South East (2021 base range: 25-27)	81%	84%	81%	73%	68%
Bristol Water (2021 base range: 40-46)	85%	84%	93%	88%	80%
Cambridge Water (2021 base range: 27-29)	76%	78%	76%	75%	63%
Essex & Suffolk Water (2021 base range: 22-26)	88%	81%	80%	72%	68%
Portsmouth Water (2021 base range: 16-19)	79%	74%	76%	68%	69%
South East Water (2021 base range: 20-24)	79%	79%	75%	74%	71%
South Staffs Water (2021 base range: 23-25)	84%	84%	96%	88%	74%
SES Water (2021 base range: 21-23)	83%	83%	78%	78%	62%

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

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

Satisfaction with aspects of contact (eleven-year trend arrow)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professionalism of staff	Feeling that contact had been / would be resolved	Was kept informed of progress
Industry (2021 base range: 874-954)	↔ 81.5%	↔ 80.4%	↑ 83.8%	↔ 79.1%	↔ 73.6%
Total WaSCs (2021 base range: 624-676)	↑ 81.1%	↔ 80.3%	↑ 83.5%	↔ 79.1%	↔ 73.6%
Anglian Water (2021 base range: 66-69)	↔ 82.5%	↑ 83.8%	↑ 85.9%	↑ 82.5%	↑ 74.9%
Dŵr Cymru Welsh Water (2021 base range: 56-63)	↓ 87.9%	↓ 84.5%	↔ 87.5%	↓ 83.6%	↑ 79.4%
Hafren Dyfrdwy (2021 base range: 31-36)	↔ 80.6%	↔ 79.4%	↔ 84.9%	↔ 80.4%	↔ 75.7%

Northumbrian Water (2021 base range: 31-33)	↓	84.1%	↓	83.3%	↓	87.3%	↓	81.2%	↔	72.0%
Severn Trent (2021 base range: 29-34)	↔	84.7%	↔	83.9%	↔	88.3%	↔	81.9%	↑	76.8%
South West Water (2021 base range: 79-88)	↑	82.0%	↔	78.5%	↑	83.8%	↔	78.7%	↑	73.3%
Southern Water (2021 base range: 63-67)	↔	75.5%	↓	73.4%	↔	77.1%	↓	72.7%	↓	62.3%
Thames Water (2021 base range: 46-50)	↓	72.8%	↔	71.3%	↔	76.0%	↔	72.6%	↔	66.2%
United Utilities (2021 base range: 121-129)	↑	81.3%	↑	82.6%	↑	83.4%	↑	79.5%	↑	77.0%
Wessex Water (2021 base range: 30-34)	↔	89.5%	↔	86.2%	↔	88.1%	↓	85.3%	↔	81.4%
Yorkshire Water (2021 base range: 71-75)	↓	84.8%	↓	84.3%	↔	85.8%	↔	81.6%	↓	78.1%

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

Satisfaction with aspects of contact (eleven-year trend arrow)	Ease of contacting someone who was able to help you	Quality / clarity of information provided	Knowledge and professional-ism of staff	Feeling that contact had been/would be resolved	Was kept informed of progress					
Industry (2021 base range: 874-954)	↔	81.5%	↔	80.4%	↑	83.8%	↔	79.1%	↔	73.6%
Total WoCs (2021 base range: 250-278)	↔	82.6%	↔	80.7%	↔	84.7%	↔	79.2%	↔	73.5%
Affinity Water Central (2021 base range: 35-41)	↓	79.4%	↔	78.2%	↔	84.6%	↔	78.1%	↔	70.2%
Affinity Water East (2021 base range: 17-18)	↔	81.5%	↔	77.6%	↔	82.9%	↑	80.9%	↔	74.4%
Affinity Water South East (2021 base range: 25-27)	↑	77.8%	↔	76.9%	↑	80.9%	↔	71.5%	↔	70.5%
Bristol Water (2021 base range: 40-46)	↔	87.0%	↑	85.9%	↑	89.0%	↔	83.0%	↑	78.4%
Cambridge Water (2021 base range: 27-29)	↓	80.9%	↓	82.0%	↓	84.4%	↓	80.6%	↓	74.2%
Essex & Suffolk Water (2021 base range: 22-26)	↑	86.6%	↑	85.3%	↔	87.4%	↑	82.8%	↔	79.3%
Portsmouth Water (2021 base range: 16-19)	↔	86.1%	↔	83.2%	↔	86.3%	↔	85.5%	↓	79.8%
South East Water (2021 base range: 20-24)	↔	79.8%	↑	76.4%	↑	79.1%	↔	73.4%	↑	68.1%
South Staffs Water (2021 base range: 23-25)	↓	84.1%	↔	82.3%	↓	87.3%	↔	80.9%	↓	76.2%
SES Water (2021 base range: 21-23)	↔	84.1%	↔	79.6%	↔	81.6%	↔	79.2%	↔	69.5%

4.5 Overall satisfaction with water company contact handling

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

Figure 29: Overall satisfaction with water company contact handling

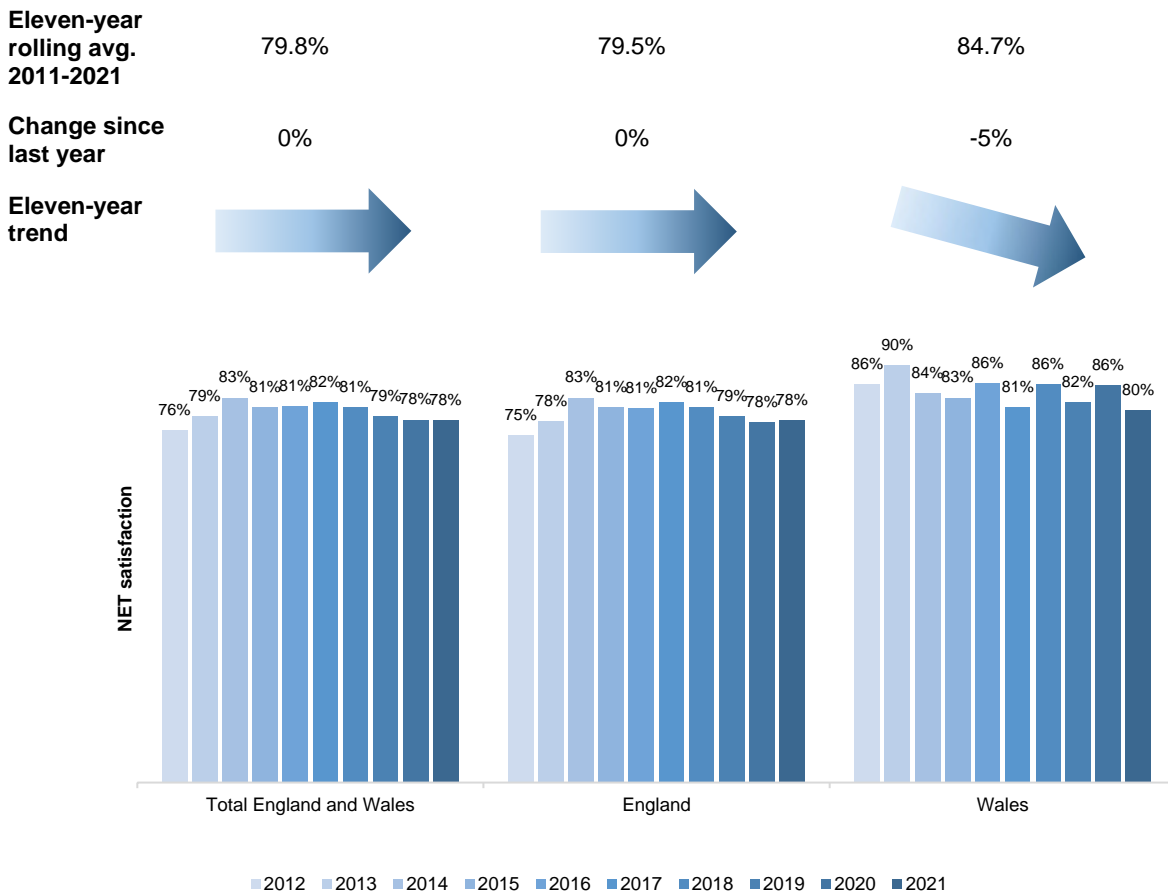


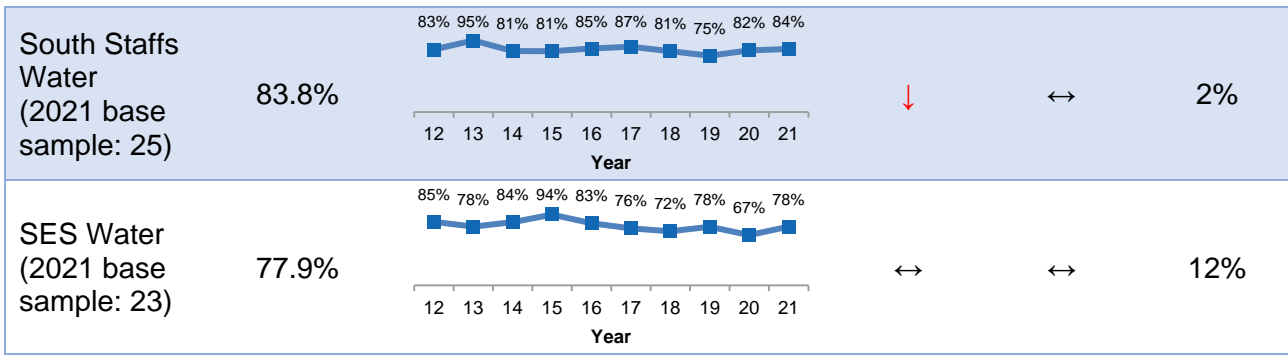
Table 36: Overall satisfaction with water company contact handling – WaSCs

Satisfaction with contact handling	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 965)	79.8%		↔	n/a	0%
Total WaSCs (2021 base sample: 684)	79.8%		↔	78%	0%

Anglian Water (2021 base sample: 69)	83.4%	<p>Year</p>	↑	↑	14%
Dŵr Cymru Welsh Water (2021 base sample: 64)	84.9%	<p>Year</p>	↓	↔	-5%
Hafren Dyfrdwy (2021 base sample: 35)	78.2%	<p>Year</p>	↔	↔	-13%
Northumbrian Water (2021 base sample: 35)	83.4%	<p>Year</p>	↓	↔	-15%
Severn Trent (2021 base sample: 34)	83.1%	<p>Year</p>	↑	↔	-3%
South West Water (2021 base sample: 88)	77.2%	<p>Year</p>	↔	↔	7%
Southern Water (2021 base sample: 68)	70.1%	<p>Year</p>	↓	↔	11%
Thames Water (2021 base sample: 50)	72.1%	<p>Year</p>	↔	↔	5%
United Utilities (2021 base sample: 129)	81.4%	<p>Year</p>	↑	↔	-12%
Wessex Water (2021 base sample: 35)	86.8%	<p>Year</p>	↔	↔	1%
Yorkshire Water (2021 base sample: 77)	83.1%	<p>Year</p>	↔	↔	-3%

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

Satisfaction with contact handling	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 965)	79.8%	<p>76% 79% 83% 81% 81% 82% 81% 79% 78% 78%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	n/a	0%
Total WoCs (2021 base sample: 281)	79.6%	<p>73% 82% 75% 85% 82% 84% 79% 78% 77% 78%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	78%	1%
Affinity Water Central (2021 base sample: 42)	77.4%	<p>79% 93% 73% 83% 77% 79% 72% 73% 70% 79%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	9%
Affinity Water East (2021 base sample: 18)	80.7%	<p>67% 79% 87% 87% 79% 90% 73% 87% 83% 78%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-6%
Affinity Water South East (2021 base sample: 28)	74.7%	<p>79% 74% 71% 68% 77% 68% 86% 79% 83% 75%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	-8%
Bristol Water (2021 base sample: 45)	85.1%	<p>57% 88% 77% 92% 84% 86% 90% 85% 91% 91%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↑	↔	1%
Cambridge Water (2021 base sample: 29)	80.1%	<p>74% 77% 86% 100% 75% 73% 91% 78% 79% 66%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↔	-14%
Essex & Suffolk Water (2021 base sample: 27)	81.3%	<p>72% 82% 68% 91% 79% 91% 90% 87% 80% 70%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-10%
Portsmouth Water (2021 base sample: 19)	84.4%	<p>50% 90% 88% 78% 90% 88% 86% 76% 96% 68%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-27%
South East Water (2021 base sample: 25)	75.3%	<p>60% 64% 68% 83% 82% 88% 74% 77% 72% 76%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	4%



4.6 Satisfaction with overall customer service

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

Figure 30: Satisfaction with overall customer service

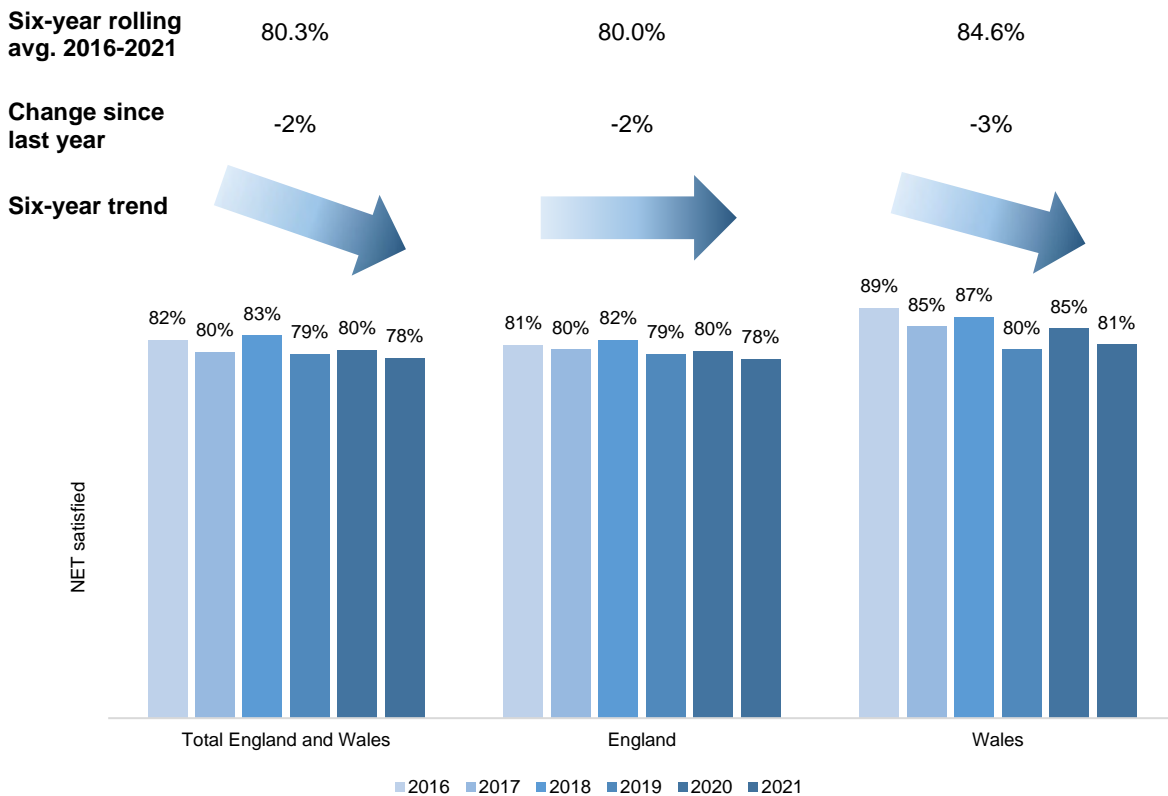


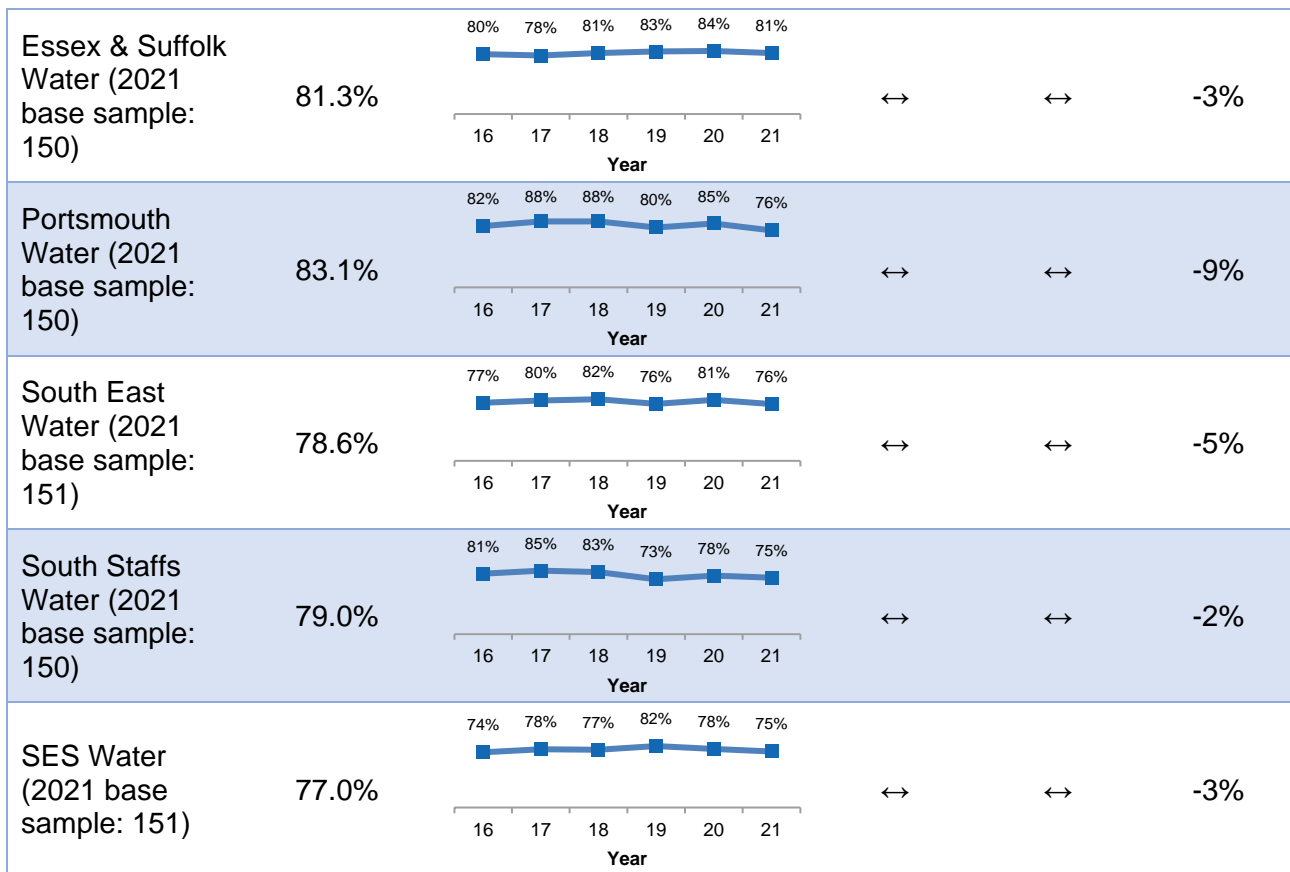
Table 38: Satisfaction with overall customer service – WaSCs

Satisfaction with overall customer service	Five-year rolling company average	Five-year company trend	Five-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	80.3%	<p>82% 80% 83% 79% 80% 78%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	n/a	-2%
Total WaSCs (2021 base sample: 3753)	80.3%	<p>83% 80% 83% 79% 80% 78%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	78%	-1%
Anglian Water (2021 base sample: 351)	80.4%	<p>81% 82% 81% 78% 78% 82%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	4%
Dŵr Cymru Welsh Water (2021 base sample: 400)	84.7%	<p>89% 86% 87% 80% 85% 81%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	↔	-4%
Hafren Dyfrdwy (2021 base sample: 200)	82.1%	<p>81% 83% 82% 83%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	1%
Northumbrian Water (2021 base sample: 200)	83.5%	<p>86% 84% 82% 79% 83% 87%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↑	4%
Severn Trent (2021 base sample: 200)	82.0%	<p>85% 79% 83% 80% 84% 80%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-4%
South West Water (2021 base sample: 400)	79.8%	<p>81% 78% 80% 76% 83% 80%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%
Southern Water (2021 base sample: 401)	75.6%	<p>78% 76% 81% 75% 72% 70%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↓	-1%
Thames Water (2021 base sample: 200)	74.9%	<p>81% 76% 78% 75% 70% 70%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	↔	1%

United Utilities (2021 base sample: 701)	80.9%		↔	↔	-4%
Wessex Water (2021 base sample: 200)	84.9%		↓	↔	-2%
Yorkshire Water (2021 base sample: 500)	82.7%		↔	↔	-1%

Table 39: Satisfaction with overall customer service – WoCs

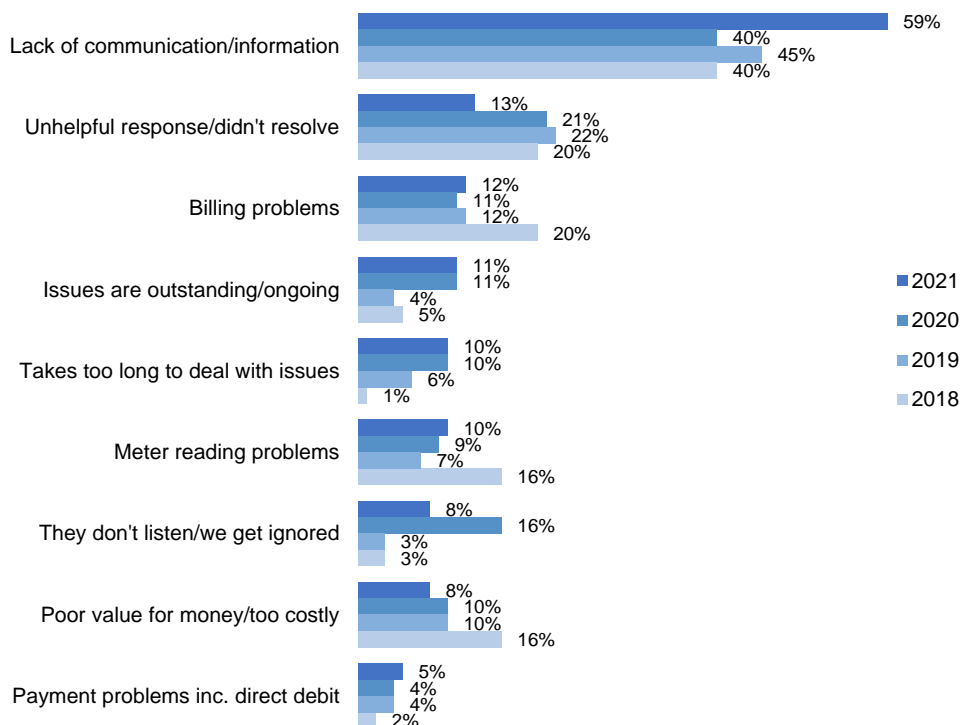
Satisfaction with overall customer service	Five-year rolling company average	Five-year company trend	Five-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	80.3%		↓	n/a	-2%
Total WoCs (2021 base sample: 1657)	80.1%		↔	78%	-4%
Affinity Water Central (2021 base sample: 154)	77.7%		↔	↔	-4%
Affinity Water East (2021 base sample: 150)	81.8%		↓	↔	-2%
Affinity Water South East (2021 base sample: 150)	79.6%		↔	↔	-4%
Bristol Water (2021 base sample: 300)	84.4%		↔	↔	-3%
Cambridge Water (2021 base sample: 150)	81.8%		↔	↔	-8%



4.7 Reasons for dissatisfaction with overall customer services

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

Figure 31: Reasons for dissatisfaction with customer services



Chapter 5: Views on water services

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

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

5.1 Satisfaction with aspects of water supply

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

This is followed by Figure 34 which compares satisfaction between England and Wales in 2021,

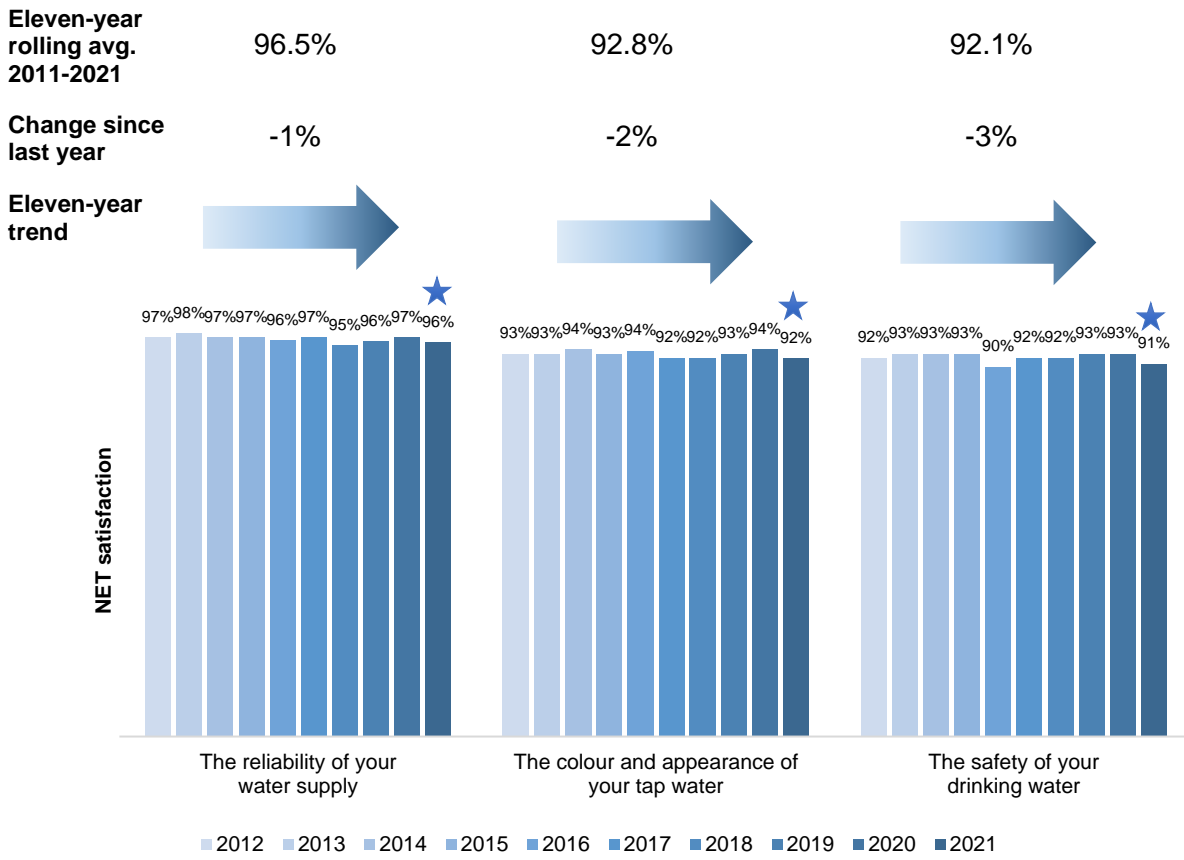
Table 40 and

Table 41 which show satisfaction in 2021 for each WaSC and WoC respectively, and finally

Table 42 and

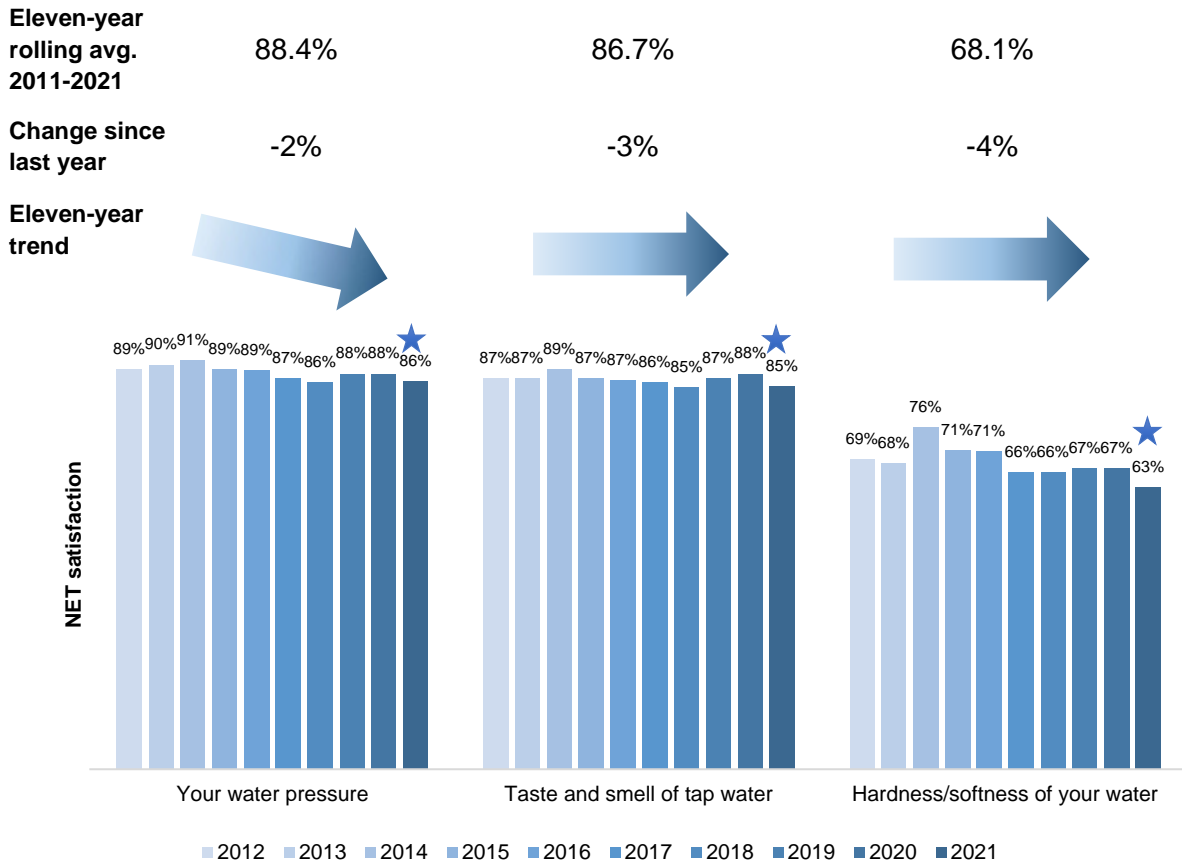
Table 43 which highlight the eleven-year trends for WaSCs and WoCs.

Figure 32: Satisfaction with aspects of water supply



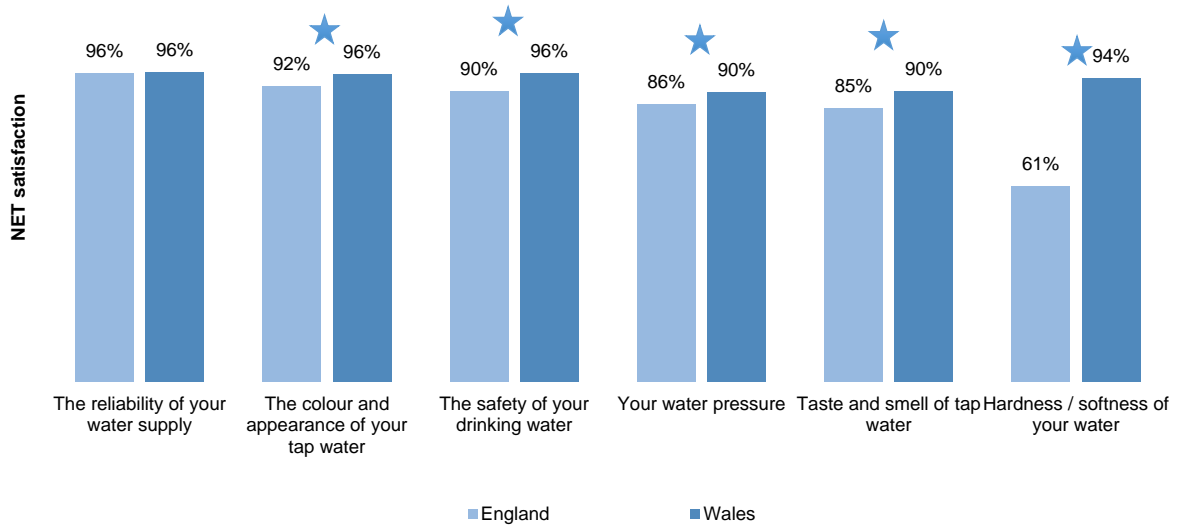
★ Significant difference between 2020 and 2021 data

Figure 33: Satisfaction with aspects of water supply



★ Significant difference between 2020 and 2021 data

Figure 34: Satisfaction with aspects of water supply by nation



★ Significant difference between England and Wales

Table 40: Satisfaction with aspects of water supply in 2021 – WaSCs

Satisfaction with aspects of water supply (2020 data only)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2021 base sample: 5410)	96%	92%	91%	86%	85%	63%
Total WaSCs (2021 base sample: 3753)	96%	92%	91%	87%	85%	66%
Anglian Water (2021 base sample: 351)	97%	93%	92%	86%	85%	46%
Dŵr Cymru Welsh Water (2021 base sample: 400)	96%	95%	96%	90%	90%	95%
Hafren Dyfrdwy (2021 base sample: 200)	96%	97%	95%	91%	94%	93%
Northumbrian Water (2021 base sample: 200)	98%	92%	92%	88%	85%	80%
Severn Trent (2021 base sample: 200)	97%	91%	93%	92%	87%	74%
South West Water (2021 base sample: 400)	96%	93%	94%	89%	89%	83%
Southern Water (2021 base sample: 401)	96%	93%	91%	89%	87%	51%
Thames Water (2021 base sample: 200)	94%	91%	87%	82%	81%	40%
United Utilities (2021 base sample: 701)	95%	89%	87%	85%	81%	78%
Wessex Water (2021 base sample: 200)	97%	92%	92%	86%	88%	59%
Yorkshire Water (2021 base sample: 500)	97%	94%	94%	87%	88%	78%

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

Table 41: Satisfaction with aspects of water supply 2021 – WoCs

Satisfaction with aspects of water supply (2020 data only)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2021 base sample: 5410)	96%	92%	91%	86%	85%	63%
Total WoCs (2021 base sample: 1657)	96%	92%	90%	85%	86%	50%
Affinity Water Central (2021 base sample: 154)	96%	91%	90%	85%	84%	39%
Affinity Water East (2021 base sample: 150)	95%	89%	85%	79%	82%	35%
Affinity Water South East (2021 base sample: 150)	97%	91%	89%	86%	86%	58%
Bristol Water (2021 base sample: 300)	99%	93%	93%	87%	87%	58%
Cambridge Water (2021 base sample: 150)	96%	97%	93%	91%	88%	42%
Essex & Suffolk Water (2021 base sample: 150)	96%	91%	87%	83%	84%	40%
Portsmouth Water (2021 base sample: 150)	97%	95%	93%	85%	86%	51%
South East Water (2021 base sample: 151)	92%	93%	88%	85%	87%	58%
South Staffs Water (2021 base sample: 150)	95%	90%	88%	85%	82%	61%
SES Water (2021 base sample: 151)	97%	95%	93%	82%	93%	57%

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

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

Satisfaction with aspects of water supply (eleven-year trend)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2021 base sample: 5410)	↔ 96.5%	↔ 92.8%	↔ 92.1%	↓ 88.4%	↔ 86.7%	↔ 68.1%
Total WaSCs (2021 base sample: 3753)	↔ 96.5%	↔ 92.9%	↔ 92.3%	↓ 88.5%	↔ 87.0%	↔ 71.2%
Anglian Water (2021 base sample: 351)	↔ 96.7%	↔ 92.8%	↔ 92.2%	↔ 87.7%	↔ 84.8%	↓ 53.1%
Dŵr Cymru Welsh Water (2021 base sample: 400)	↔ 97.7%	↔ 95.1%	↔ 95.3%	↔ 91.1%	↔ 91.1%	↔ 92.3%
Hafren Dyfrdwy (2021 base sample: 200)	↔ 98.0%	↔ 95.3%	↔ 95.1%	↔ 90.2%	↔ 92.5%	↔ 91.0%
Northumbrian Water (2021 base sample: 200)	↔ 98.1%	↔ 95.1%	↓ 94.6%	↔ 91.6%	↔ 89.7%	↔ 85.2%
Severn Trent (2021 base sample: 200)	↔ 97.0%	↔ 92.3%	↔ 92.6%	↔ 89.6%	↔ 86.2%	↔ 73.6%
South West Water (2021 base sample: 400)	↔ 96.2%	↔ 93.4%	↔ 92.4%	↔ 90.1%	↔ 86.1%	↔ 87.1%
Southern Water (2021 base sample: 401)	↓ 96.4%	↓ 91.7%	↓ 91.6%	↔ 89.2%	↔ 85.9%	↓ 56.9%
Thames Water (2021 base sample: 200)	↓ 94.6%	↓ 90.9%	↓ 88.8%	↓ 85.0%	↓ 83.9%	↓ 51.5%
United Utilities (2021 base sample: 701)	↔ 96.5%	↔ 93.5%	↔ 92.4%	↔ 88.0%	↔ 88.3%	↔ 86.2%
Wessex Water (2021 base sample: 200)	↓ 97.3%	↔ 94.0%	↑ 93.3%	↔ 89.9%	↔ 87.4%	↔ 60.3%
Yorkshire Water (2021 base sample: 500)	↔ 97.3%	↔ 94.3%	↔ 94.7%	↓ 89.9%	↑ 90.1%	↔ 80.3%

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

Satisfaction with aspects of water supply (eleven-year trend)	The reliability of water supply	Colour and appearance of tap water	Safety of drinking water	Water pressure	Taste and smell of tap water	Hardness / softness of water
Industry (2021 base sample: 5410)	↔ 96.5%	↔ 92.8%	↔ 92.1%	↓ 88.4%	↔ 86.7%	↔ 68.1%
Total WoCs (2021 base sample: 1657)	↔ 96.6%	↑ 92.3%	↔ 91.5%	↔ 87.7%	↔ 85.8%	↓ 56.9%
Affinity Water Central (2021 base sample: 154)	↑ 95.9%	↑ 90.6%	↑ 88.9%	↔ 85.4%	↔ 82.3%	↔ 44.9%
Affinity Water East (2021 base sample: 150)	↔ 97.1%	↔ 92.5%	↓ 90.3%	↓ 83.3%	↓ 86.3%	↔ 51.8%
Affinity Water South East (2021 base sample: 150)	↔ 96.5%	↑ 90.2%	↔ 91.3%	↔ 87.8%	↔ 83.8%	↔ 54.2%
Bristol Water (2021 base sample: 300)	↑ 97.2%	↑ 93.5%	↑ 92.5%	↔ 89.0%	↔ 87.6%	↓ 63.1%
Cambridge Water (2021 base sample: 150)	↔ 97.5%	↔ 94.8%	↔ 94.5%	↔ 90.9%	↔ 88.3%	↔ 52.5%
Essex & Suffolk Water (2021 base sample: 150)	↓ 97.1%	↔ 92.7%	↔ 91.6%	↓ 87.8%	↔ 87.9%	↓ 53.0%
Portsmouth Water (2021 base sample: 150)	↔ 97.6%	↔ 93.8%	↔ 92.9%	↔ 88.8%	↔ 88.4%	↔ 58.3%
South East Water (2021 base sample: 151)	↔ 96.0%	↔ 91.2%	↔ 90.8%	↓ 88.0%	↔ 83.0%	↓ 58.6%
South Staffs Water (2021 base sample: 150)	↔ 96.1%	↔ 92.2%	↔ 92.5%	↔ 88.6%	↔ 86.0%	↔ 71.3%
SES Water (2021 base sample: 151)	↔ 97.9%	↔ 94.9%	↔ 94.9%	↓ 88.7%	↔ 92.7%	↓ 67.2%

5.2 Overall satisfaction with water supply

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

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

Figure 35: Overall satisfaction with water supply

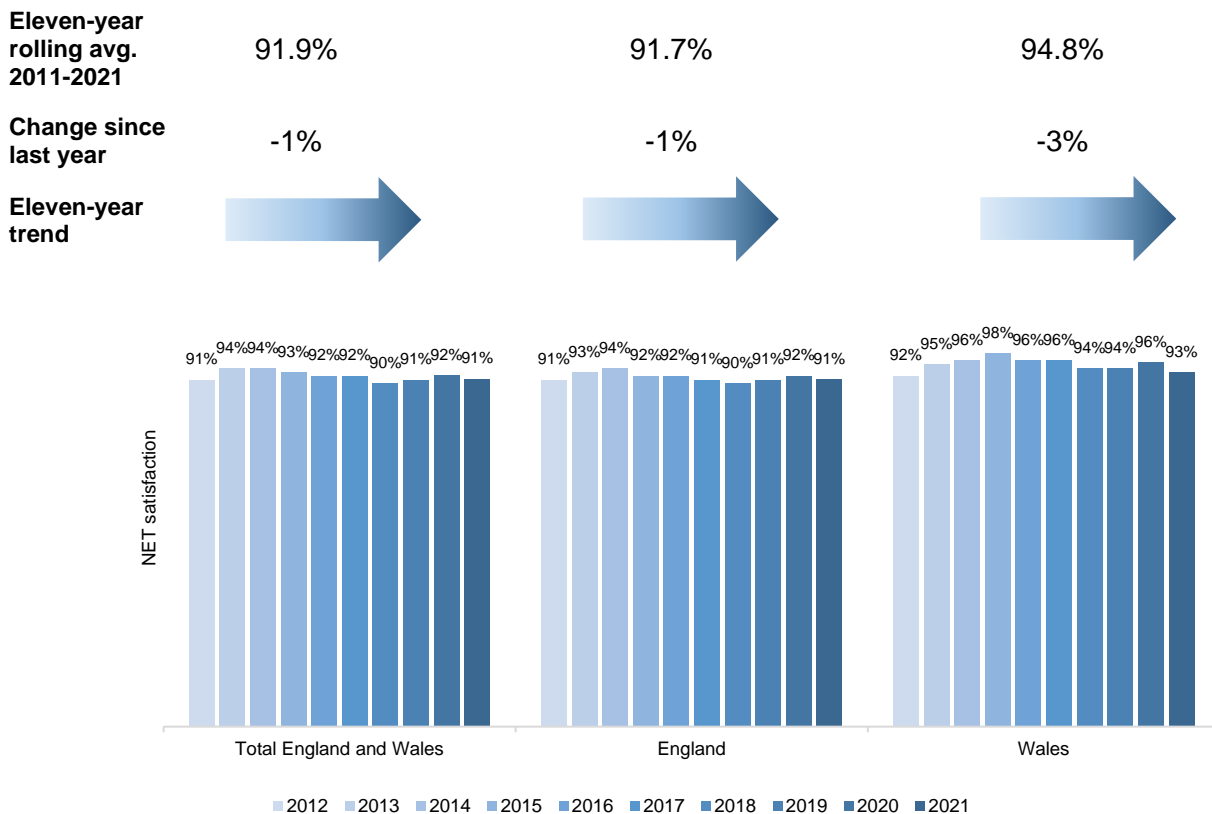


Table 44: Overall satisfaction with water supply – WaSCs

Satisfaction with water supply	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	91.9%		↔	n/a	-1%
Total WaSCs (2021 base sample: 3753)	91.9%		↔	91%	-1%
Anglian Water (2021 base sample: 351)	91.5%		↔	↔	3%

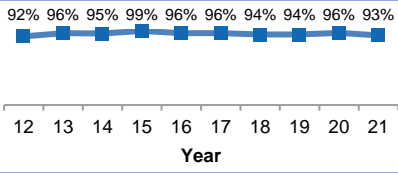
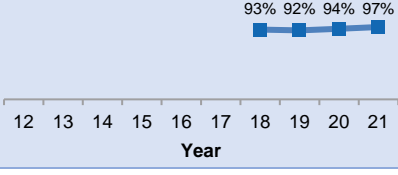
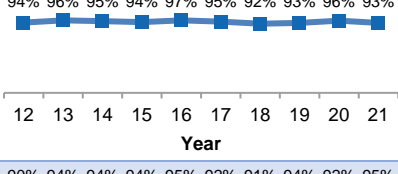
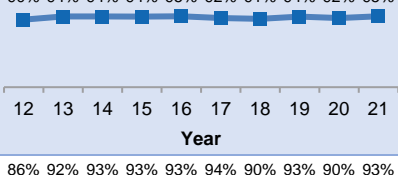
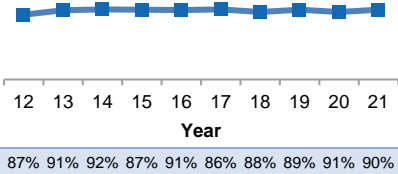
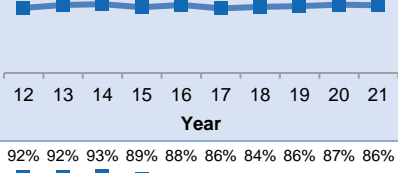
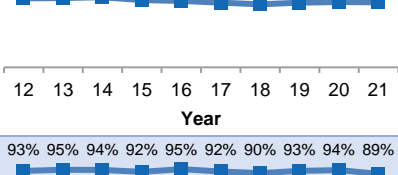
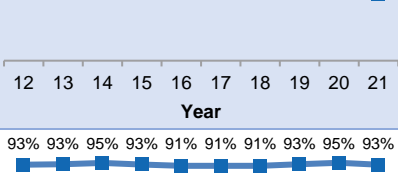
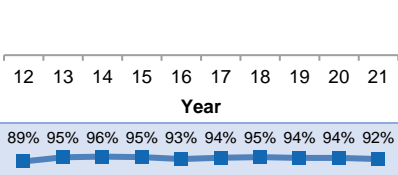
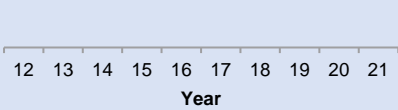
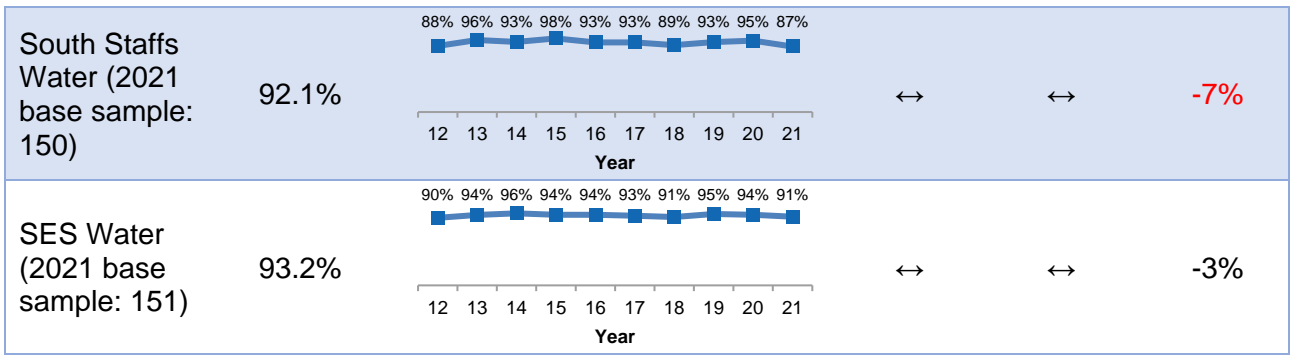
Dŵr Cymru Welsh Water (2021 base sample: 400)	94.8%		↔	↔	-3%
Hafren Dyfrdwy (2021 base sample: 200)	93.9%		n/a	↔	3%
Northumbrian Water (2021 base sample: 200)	94.4%		↔	↔	-3%
Severn Trent (2021 base sample: 200)	93.0%		↔	↑	3%
South West Water (2021 base sample: 400)	91.3%		↔	↔	3%
Southern Water (2021 base sample: 401)	89.2%		↔	↔	-1%
Thames Water (2021 base sample: 200)	88.6%		↓	↓	-1%
United Utilities (2021 base sample: 701)	92.4%		↔	↔	-5%
Wessex Water (2021 base sample: 200)	92.8%		↔	↔	-2%
Yorkshire Water (2021 base sample: 500)	93.8%		↔	↔	-2%

Table 45: Overall satisfaction with water supply – WoCs

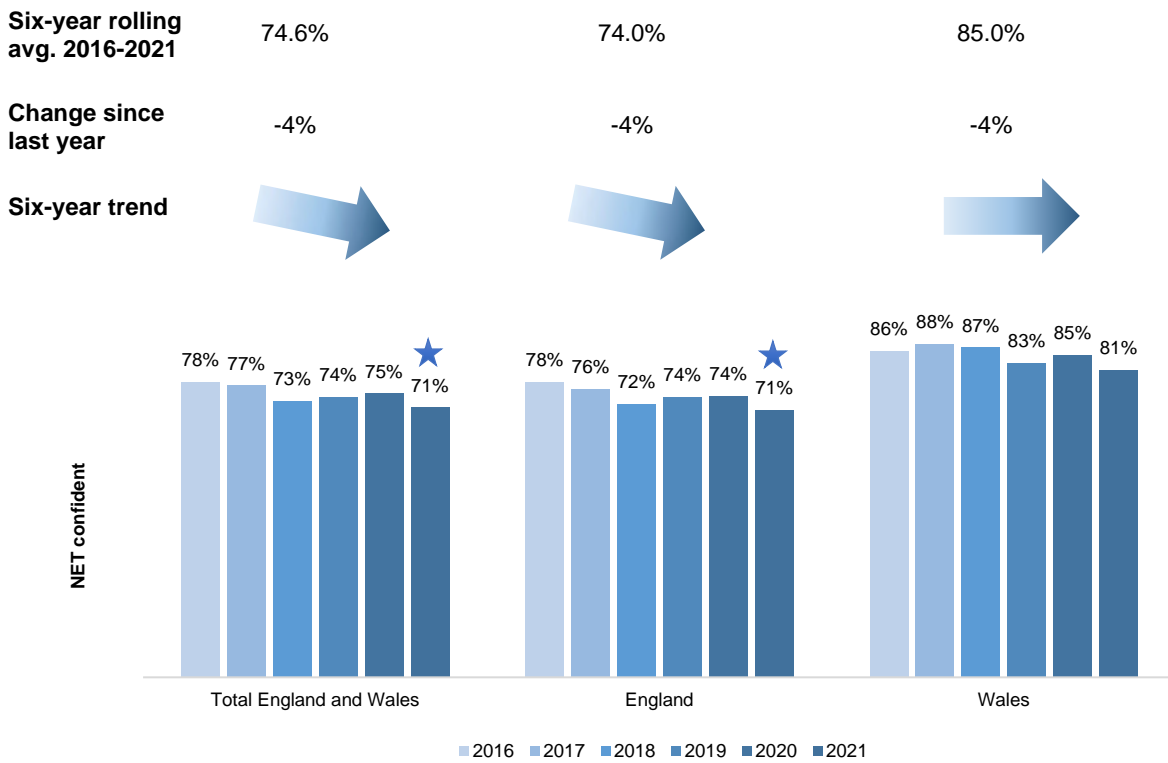
Satisfaction with water supply	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	91.9%	<p>91% 94% 94% 93% 92% 92% 90% 91% 92% 91%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	n/a	-1%
Total WoCs (2021 base sample: 1657)	91.7%	<p>89% 93% 93% 93% 91% 92% 91% 91% 93% 91%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	91%	-2%
Affinity Water Central (2021 base sample: 154)	90.7%	<p>88% 91% 95% 93% 89% 91% 85% 90% 95% 93%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-2%
Affinity Water East (2021 base sample: 150)	89.9%	<p>84% 89% 97% 92% 91% 91% 90% 87% 89% 87%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-2%
Affinity Water South East (2021 base sample: 150)	89.9%	<p>91% 89% 91% 88% 91% 87% 91% 89% 91% 89%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-2%
Bristol Water (2021 base sample: 300)	93.2%	<p>90% 95% 94% 95% 89% 95% 97% 94% 93% 92%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-1%
Cambridge Water (2021 base sample: 150)	94.5%	<p>92% 96% 94% 93% 98% 95% 96% 96% 92% 92%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	0%
Essex & Suffolk Water (2021 base sample: 150)	91.9%	<p>91% 95% 91% 92% 93% 89% 91% 91% 91% 91%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↔	0%
Portsmouth Water (2021 base sample: 150)	93.4%	<p>87% 93% 94% 95% 93% 95% 91% 96% 93% 95%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	2%
South East Water (2021 base sample: 151)	89.9%	<p>88% 91% 91% 90% 87% 91% 93% 86% 93% 90%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%



5.3 Confidence in the long-term supply of water

In 2016 a new question was added to Water Matters to find out how confident customers feel that in the longer term, their water supply will be available without restriction, i.e. not subject to hosepipe bans or other restrictions on use. The findings at national level are shown in Figure 36. This is followed by Table 46 and Table 47 which shows perceptions by WaSC and then by WoC.

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



★ Significant difference between 2020 and 2021 data

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

Confidence in the long-term supply of water	Six-year rolling company average	Six-year company trend	Six-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	74.6%	<p>78% 77% 73% 74% 75% 71%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	n/a	-4%
Total WaSCs (2021 base sample: 3753)	75.9%	<p>80% 77% 74% 76% 76% 73%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	73%	-3%
Anglian Water (2021 base sample: 351)	73.1%	<p>74% 78% 73% 70% 73% 69%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-4%
Dŵr Cymru Welsh Water (2021 base sample: 400)	85.2%	<p>86% 88% 87% 83% 85% 81%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↑	-4%
Hafren Dyfrdwy (2021 base sample: 200)	80.9%	<p>83% 79% 80% 81%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	1%
Northumbrian Water (2021 base sample: 200)	87.1%	<p>85% 88% 85% 87% 89% 86%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↑	-3%
Severn Trent (2021 base sample: 200)	77.1%	<p>83% 81% 74% 75% 78% 72%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	↔	-5%
South West Water (2021 base sample: 400)	78.1%	<p>83% 77% 75% 80% 78% 76%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-2%
Southern Water (2021 base sample: 401)	66.0%	<p>74% 63% 64% 68% 64% 64%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	↓	0%
Thames Water (2021 base sample: 200)	67.0%	<p>73% 65% 64% 66% 66% 68%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	2%

United Utilities (2021 base sample: 701)	75.8%		↔	↔	-2%
Wessex Water (2021 base sample: 200)	79.7%		↔	↔	-1%
Yorkshire Water (2021 base sample: 500)	83.1%		↔	↔	-4%

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

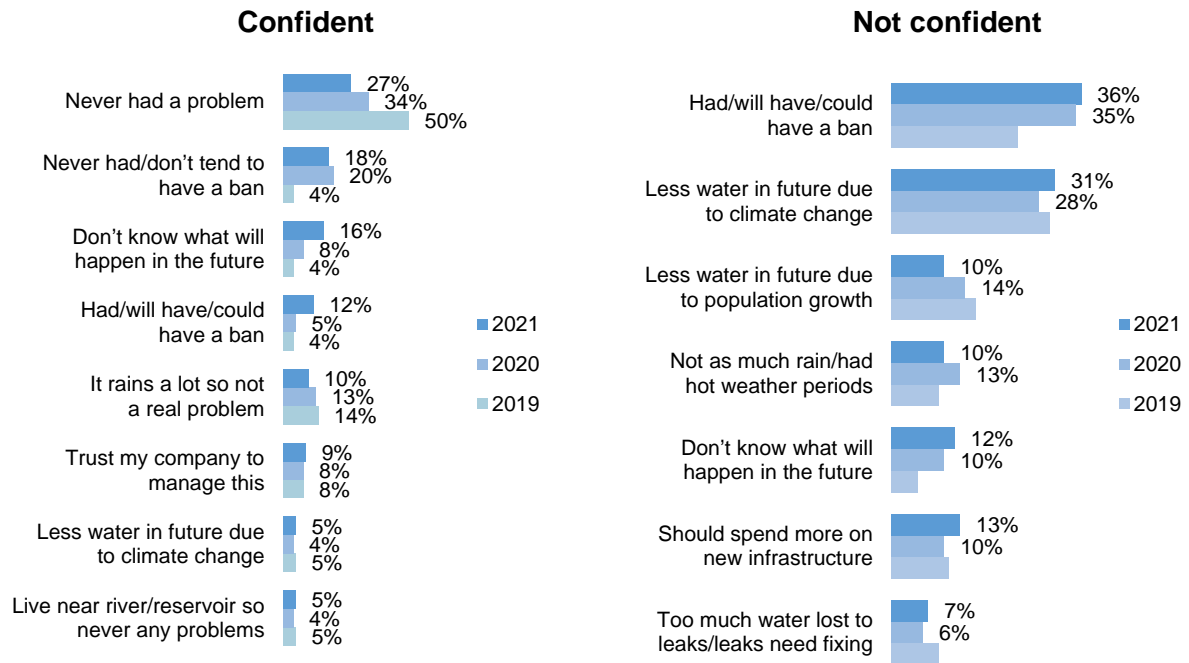
Confidence in the long-term supply of water	Six-year rolling company average	Six-year company trend	Six-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	74.6%		↓	n/a	-4%
Total WoCs (2021 base sample: 1657)	69.8%		↔	63%	-9%
Affinity Water Central (2021 base sample: 154)	65.0%		↔	↔	-6%
Affinity Water East (2021 base sample: 150)	69.7%		↔	↔	-13%
Affinity Water South East (2021 base sample: 150)	64.5%		↔	↔	-3%
Bristol Water (2021 base sample: 300)	75.1%		↔	↔	-6%
Cambridge Water (2021 base sample: 150)	69.7%		↓	↔	2%

Essex & Suffolk Water (2021 base sample: 150)	73.7%	<p>76% 73% 76% 74% 78% 66%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-11%
Portsmouth Water (2021 base sample: 150)	75.1%	<p>76% 77% 76% 78% 74% 68%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-6%
South East Water (2021 base sample: 151)	61.8%	<p>69% 64% 63% 59% 65% 50%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↓	↓	-15%
South Staffs Water (2021 base sample: 150)	79.1%	<p>79% 83% 77% 80% 84% 72%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-12%
SES Water (2021 base sample: 151)	64.9%	<p>66% 68% 60% 68% 64% 63%</p> <p>16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-1%

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

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

Figure 37: Reasons for confidence / lack of confidence



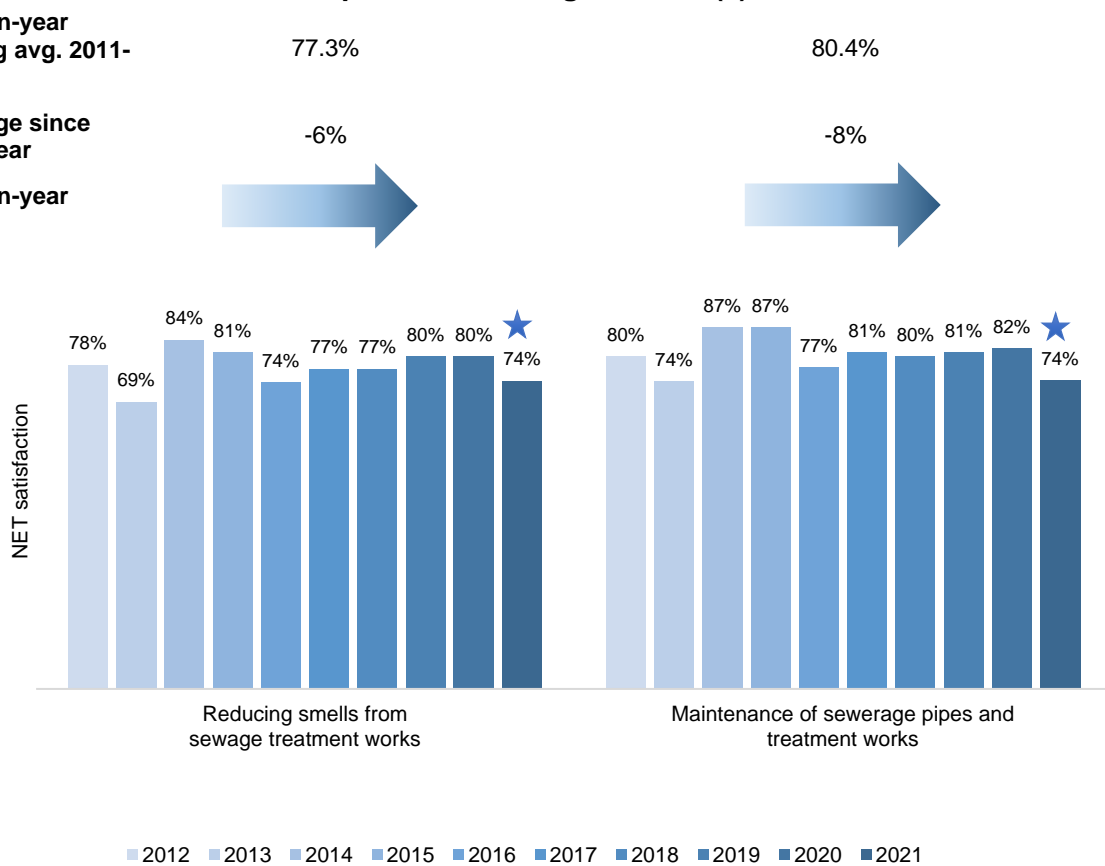
Chapter 6: Views on sewerage services

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

6.1 Satisfaction with aspects of sewerage service

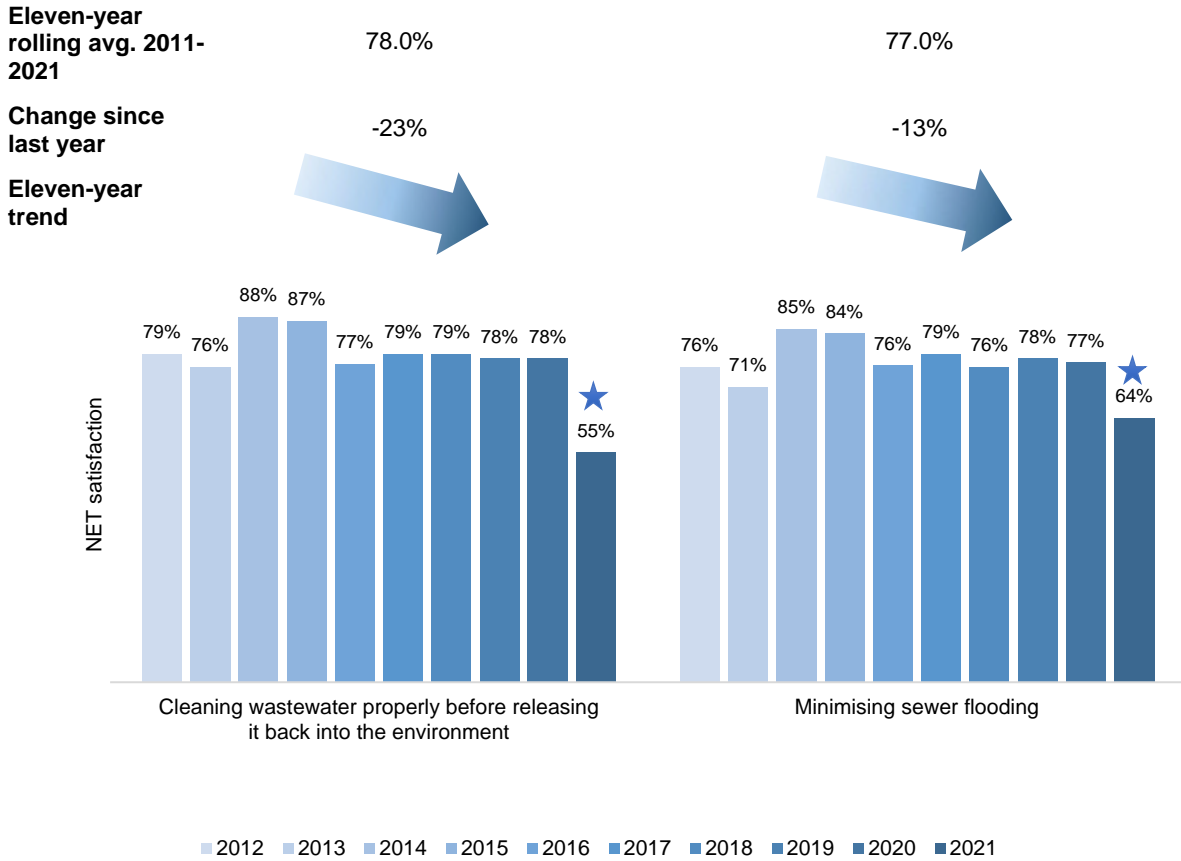
Figure 38 and Figure 39 shows the national trends for satisfaction with the four key aspects of sewerage service. This is followed by Figure 40 which compares satisfaction between England and Wales in 2020, Table 48 and Table 49 which show satisfaction in 2020 for each WaSC and WoC respectively, and finally and Table 51 which highlight the eleven-year trends for WaSCs and WoCs.

Figure 38: Satisfaction with aspects of sewerage service (1)



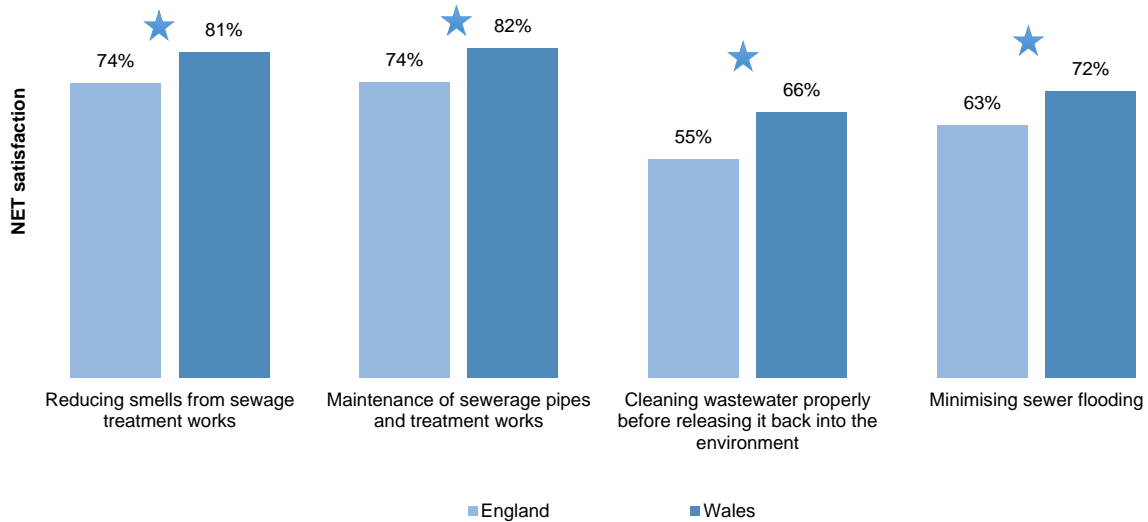
★Significant difference between 2020 and 2021 data

Figure 39: Satisfaction with aspects of sewerage service (2)



★ Significant difference between 2020 and 2021 data

Figure 40: Satisfaction with aspects of sewerage service by nation



★ Significant difference between England and Wales 2021

Table 48: Satisfaction with aspects of sewerage service in 2021 – WaSCs

Satisfaction with aspects of sewerage (2021 data only)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2021 base sample: 5410)	74%	74%	55%	64%
Total WaSCs (2021 base sample: 3753)	75%	75%	58%	65%
Anglian Water (2021 base sample: 351)	79%	78%	63%	70%
Dŵr Cymru Welsh Water (2021 base sample: 400)	82%	82%	67%	71%
Hafren Dyfrdwy (2021 base sample: 200)	79%	89%	66%	77%
Northumbrian Water (2021 base sample: 200)	86%	83%	68%	73%
Severn Trent (2021 base sample: 200)	83%	81%	67%	73%
South West Water (2021 base sample: 400)	75%	76%	54%	62%
Southern Water (2021 base sample: 401)	65%	62%	34%	51%
Thames Water (2021 base sample: 200)	60%	62%	45%	54%
United Utilities (2021 base sample: 701)	76%	77%	62%	64%
Wessex Water (2021 base sample: 200)	78%	75%	50%	66%
Yorkshire Water (2021 base sample: 500)	77%	80%	59%	68%

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

Table 49: Satisfaction with aspects of sewerage service in 2021 – WoCs

Satisfaction with aspects of sewerage (2021 data only)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2021 base sample: 5410)	74%	74%	55%	64%
Total WoCs (2021 base sample: 1657)	69%	70%	46%	57%
Affinity Water Central (2021 base sample: 154)	64%	73%	55%	60%
Affinity Water East (2021 base sample: 150)	76%	75%	52%	67%
Affinity Water South East (2021 base sample: 150)	65%	65%	31%	44%
Bristol Water (2021 base sample: 300)	77%	83%	50%	64%
Cambridge Water (2021 base sample: 150)	73%	75%	46%	58%
Essex & Suffolk Water (2021 base sample: 150)	68%	71%	47%	63%
Portsmouth Water (2021 base sample: 150)	53%	51%	17%	40%
South East Water (2021 base sample: 151)	69%	65%	40%	50%
South Staffs Water (2021 base sample: 150)	79%	71%	58%	57%
SES Water (2021 base sample: 151)	67%	57%	36%	50%

Footnote: Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red. For WoCs, satisfaction with sewerage services may encompass more than one sewerage company – for example, Bournemouth Water's sewerage services are provided by Southern Water or Wessex Water.

Table 50: Satisfaction with aspects of sewerage service – WaSC eleven-year trends (arrows) and eleven-year rolling averages (figures)

Satisfaction with aspects of sewerage (eleven-year trend data)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2021 base sample: 5410)	↔ 77.3%	↔ 80.4%	↓ 78.0%	↓ 77.0%
Total WaSCs (2021 base sample: 3753)	↔ 77.6%	↔ 80.8%	↓ 78.6%	↓ 77.5%
Anglian Water (2021 base sample: 351)	↔ 76.7%	↔ 81.3%	↓ 80.6%	↓ 78.9%
Dŵr Cymru Welsh Water (2021 base sample: 400)	↔ 82.2%	↔ 84.5%	↔ 82.6%	↔ 81.2%
Hafren Dyfrdwy (2021 base sample: 200)	↔ 83.3%	↔ 85.7%	↔ 78.6%	↔ 80.7%
Northumbrian Water (2021 base sample: 200)	↔ 82.7%	↔ 85.9%	↔ 83.8%	↔ 82.5%
Severn Trent (2021 base sample: 200)	↔ 81.5%	↔ 83.0%	↔ 82.5%	↔ 80.2%
South West Water (2021 base sample: 400)	↑ 75.8%	↔ 78.5%	↓ 73.0%	↓ 71.3%
Southern Water (2021 base sample: 401)	↓ 74.5%	↓ 78.0%	↓ 72.0%	↓ 73.2%
Thames Water (2021 base sample: 200)	↓ 72.0%	↔ 74.8%	↓ 70.6%	↓ 71.9%
United Utilities (2021 base sample: 701)	↔ 76.9%	↔ 81.6%	↔ 80.9%	↓ 78.6%
Wessex Water (2021 base sample: 200)	↔ 79.9%	↔ 83.8%	↔ 79.5%	↔ 79.0%
Yorkshire Water (2021 base sample: 500)	↔ 78.5%	↔ 82.2%	↔ 80.1%	↔ 78.6%

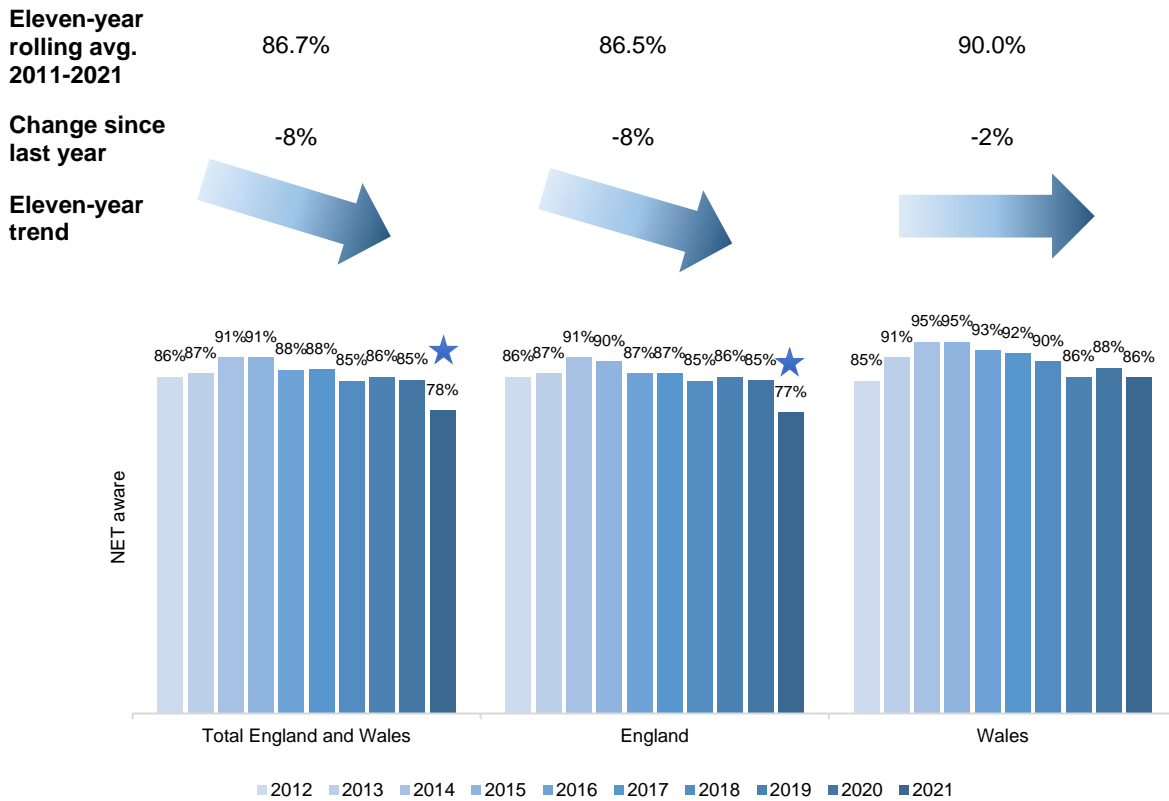
Table 51: Satisfaction with aspects of sewerage service – WoC eleven-year trends (arrows) and eleven-year rolling averages (figures)

Satisfaction with aspects of sewerage (eleven year trend data)	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2021 base sample: 5410)	↔ 77.3%	↔ 80.4%	↓ 78.0%	↓ 77.0%
Total WoCs (2021 base sample: 1657)	↔ 76.2%	↔ 79%	↓ 75.8%	↓ 75.2%
Affinity Water Central (2021 base sample: 154)	↔ 77.2%	↓ 78.7%	↓ 75.1%	↔ 73.9%
Affinity Water East (2021 base sample: 150)	↔ 77.2%	↔ 79.1%	↓ 77.4%	↓ 78.6%
Affinity Water South East (2021 base sample: 150)	↔ 76.6%	↔ 78.6%	↔ 72.6%	↓ 73.4%
Bristol Water (2021 base sample: 300)	↔ 80.0%	↔ 84.0%	↔ 78.4%	↔ 80.8%
Cambridge Water (2021 base sample: 150)	↔ 74.4%	↔ 80.0%	↔ 79.4%	↓ 76.9%
Essex & Suffolk Water (2021 base sample: 150)	↔ 73.3%	↔ 78.1%	↓ 75.4%	↓ 74.3%
Portsmouth Water (2021 base sample: 150)	↔ 73.9%	↓ 77.0%	↓ 68.3%	↓ 71.2%
South East Water (2021 base sample: 151)	↔ 75.8%	↓ 76.2%	↓ 73.3%	↓ 73.1%
South Staffs Water (2021 base sample: 150)	↔ 79.9%	↔ 81.9%	↔ 81.9%	↔ 79.4%
SES Water (2021 base sample: 151)	↔ 72.4%	↓ 75.5%	↓ 72.8%	↓ 69.9%

6.2 Overall satisfaction with sewerage services

After rating satisfaction with different aspects of sewerage services, customers were asked for their overall level of satisfaction with their sewerage services. Figure 41 shows eleven-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by Table 52 and which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 41: Overall satisfaction with sewerage service



★ Significant difference between 2020 and 2021 data

Table 52: Overall satisfaction with sewerage service – WaSCs

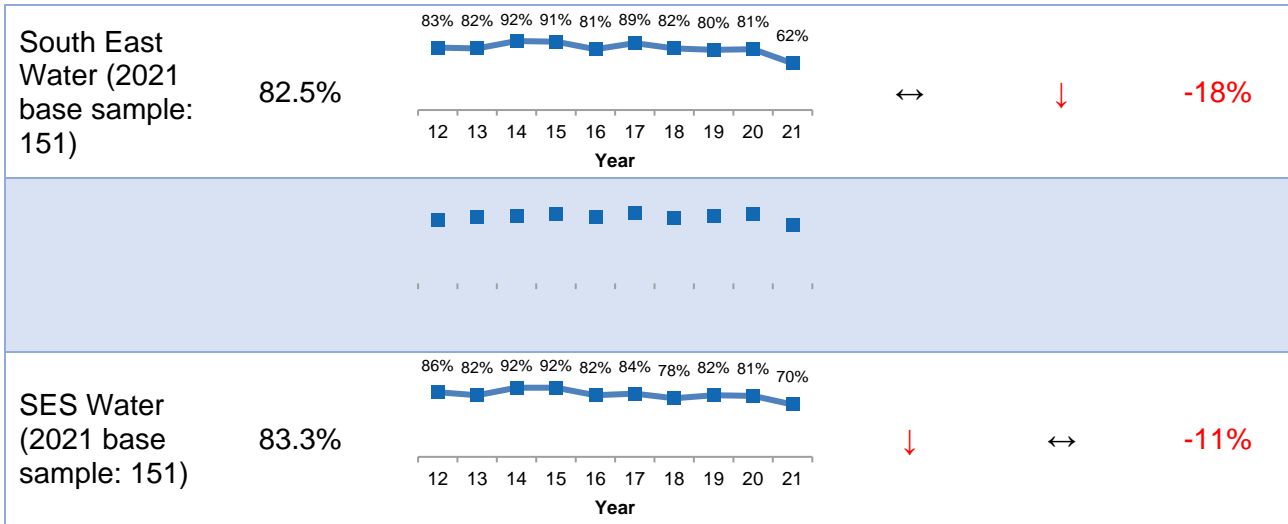
Satisfaction with sewerage service	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WaSC average	Change since last year
Industry (2021 base sample: 5410)	86.7%		↓	n/a	-8%
Total WaSCs (2021 base sample: 3753)	87.0%		↓	82%	-6%
Anglian Water (2021 base sample: 351)	87.0%		↔	↔	-3%

Dŵr Cymru Welsh Water (2021 base sample: 400)	90.0%	<p>85% 91% 95% 96% 93% 92% 90% 85% 88% 86%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	-2%
Hafren Dyfrdwy (2021 base sample: 200)	87.7%	<p>90% 89% 88% 84%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%
Northumbrian Water (2021 base sample: 200)	90.2%	<p>90% 91% 90% 92% 92% 92% 90% 91% 89% 84%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-6%
Severn Trent (2021 base sample: 200)	89.8%	<p>91% 92% 92% 93% 89% 86% 88% 91% 90% 86%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↑	-5%
South West Water (2021 base sample: 400)	82.6%	<p>77% 87% 89% 85% 81% 82% 77% 85% 84% 79%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-5%
Southern Water (2021 base sample: 401)	82.5%	<p>78% 86% 91% 85% 89% 83% 86% 83% 81% 63%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↓	-18%
Thames Water (2021 base sample: 200)	81.8%	<p>86% 84% 88% 86% 83% 84% 76% 79% 78% 66%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↓	-12%
United Utilities (2021 base sample: 701)	88.6%	<p>87% 89% 93% 93% 90% 89% 87% 87% 87% 82%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↔	-5%
Wessex Water (2021 base sample: 200)	89.0%	<p>87% 90% 94% 93% 91% 90% 87% 93% 87% 78%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↔	↔	-9%
Yorkshire Water (2021 base sample: 500)	88.8%	<p>85% 87% 91% 92% 91% 89% 88% 90% 85% 84%</p> <p>12 13 14 15 16 17 18 19 20 21</p> <p>Year</p>	↓	↑	-1%

Table 53: Overall satisfaction with sewerage service – WoCs

Satisfaction with sewerage service ²⁵	Eleven-year rolling company average	Eleven-year company trend	Eleven-year trend	Company average vs WoC average	Change since last year
Industry (2021 base sample: 5410)	86.7%	<p>86% 87% 91% 91% 88% 88% 85% 86% 85% 78%</p> <p>Year</p>	↓	n/a	-8%
Total WoCs (2021 base sample: 1657)	87.0%	<p>83% 85% 91% 91% 85% 88% 86% 86% 85% 71%</p> <p>Year</p>	↓	71%	-14%
Affinity Water Central (2021 base sample: 154)	84.6%	<p>81% 85% 89% 89% 85% 88% 87% 87% 82% 73%</p> <p>Year</p>	↔	↔	-10%
Affinity Water East (2021 base sample: 150)	84.8%	<p>81% 81% 94% 89% 85% 81% 82% 89% 86% 76%</p> <p>Year</p>	↔	↔	-10%
Affinity Water South East (2021 base sample: 150)	82.2%	<p>90% 78% 90% 88% 83% 85% 82% 84% 80% 62%</p> <p>Year</p>	↔	↓	-17%
Bristol Water (2021 base sample: 300)	89.1%	<p>85% 88% 92% 91% 85% 93% 91% 92% 91% 79%</p> <p>Year</p>	↔	↑	-12%
Cambridge Water (2021 base sample: 150)	87.2%	<p>89% 87% 94% 87% 88% 90% 88% 87% 86% 74%</p> <p>Year</p>	↓	↔	-12%
Essex & Suffolk Water (2021 base sample: 150)	85.7%	<p>85% 88% 86% 91% 83% 84% 86% 88% 88% 74%</p> <p>Year</p>	↓	↔	-14%
Portsmouth Water (2021 base sample: 150)	81.4%	<p>81% 85% 91% 88% 90% 84% 80% 80% 78% 54%</p> <p>Year</p>	↔	↓	-24%

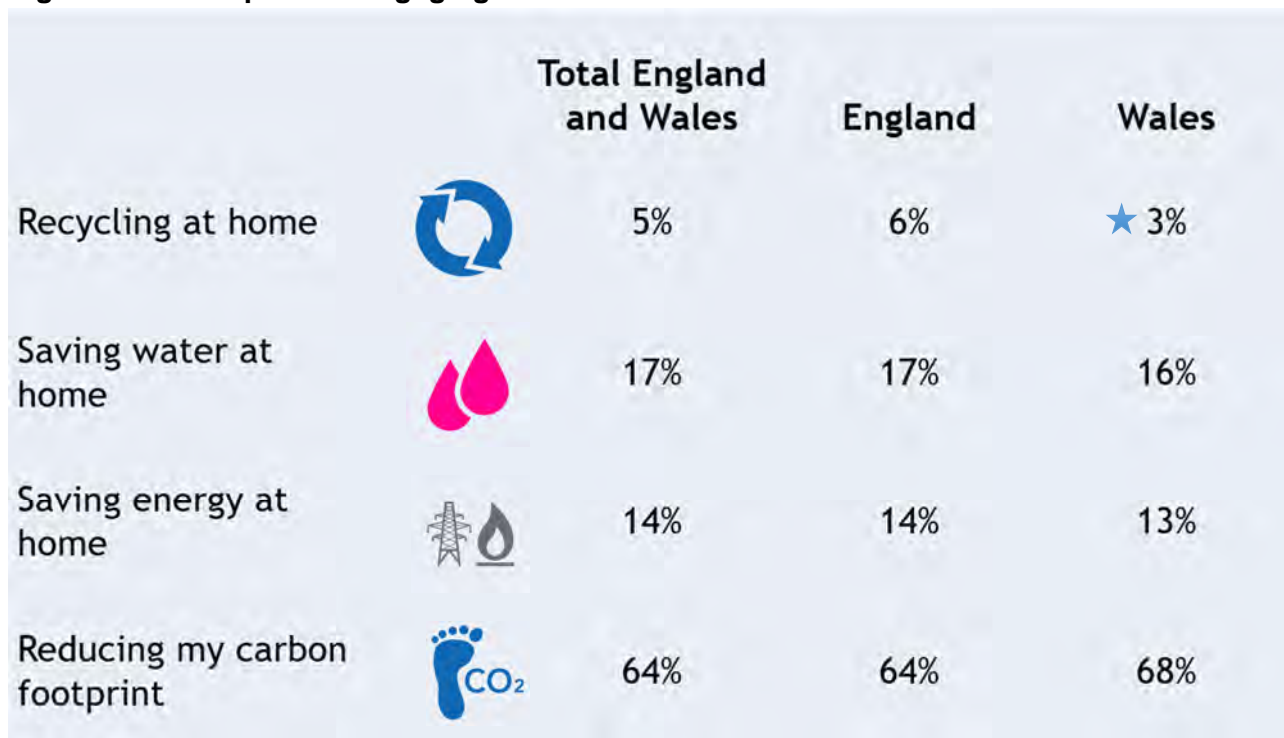
²⁵ Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for



Chapter 7: Environmental behaviours

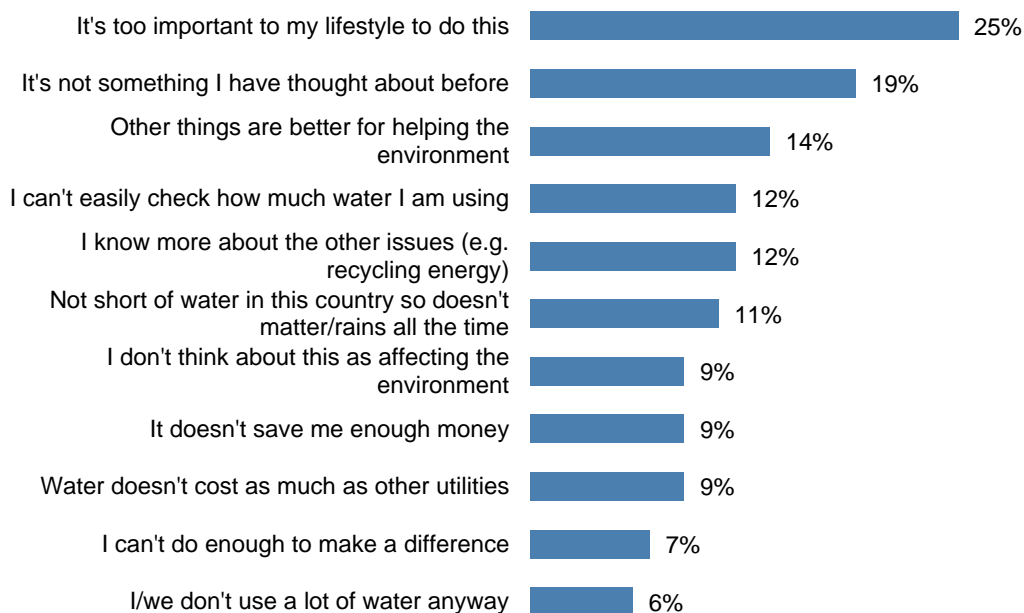
This chapter covers the subject of environmental behaviours. This is measured via new questions, added to the Water Matters survey in 2021, to find out the effort consumers put into engaging with environmental issues. Figure 44 shows the results for the behaviour receiving the least effort for England and Wales, and for England and for Wales individually, followed by Figure 43 which shows the reason why less effort was put into water saving (if this was the case).

Figure 42: Effort put into engaging with environmental issues – lowest effort



★ Significant difference between England and Wales 2021

Figure 43: Why put least effort into saving water



Chapter 8: Overall experience measures

This final chapter covers overall experience. This is measured via a new question, which was added to the Water Matters survey in 2017, to find out, all things considered, how customers rate their overall satisfaction with their water company. Data from 2017-2021 is shown in Figure 44. This is followed by Table 54 and which show satisfaction for WaSCs and for WoCs in turn.

8.1 Overall satisfaction

Figure 44: Satisfaction with overall experience of water/sewerage service provider

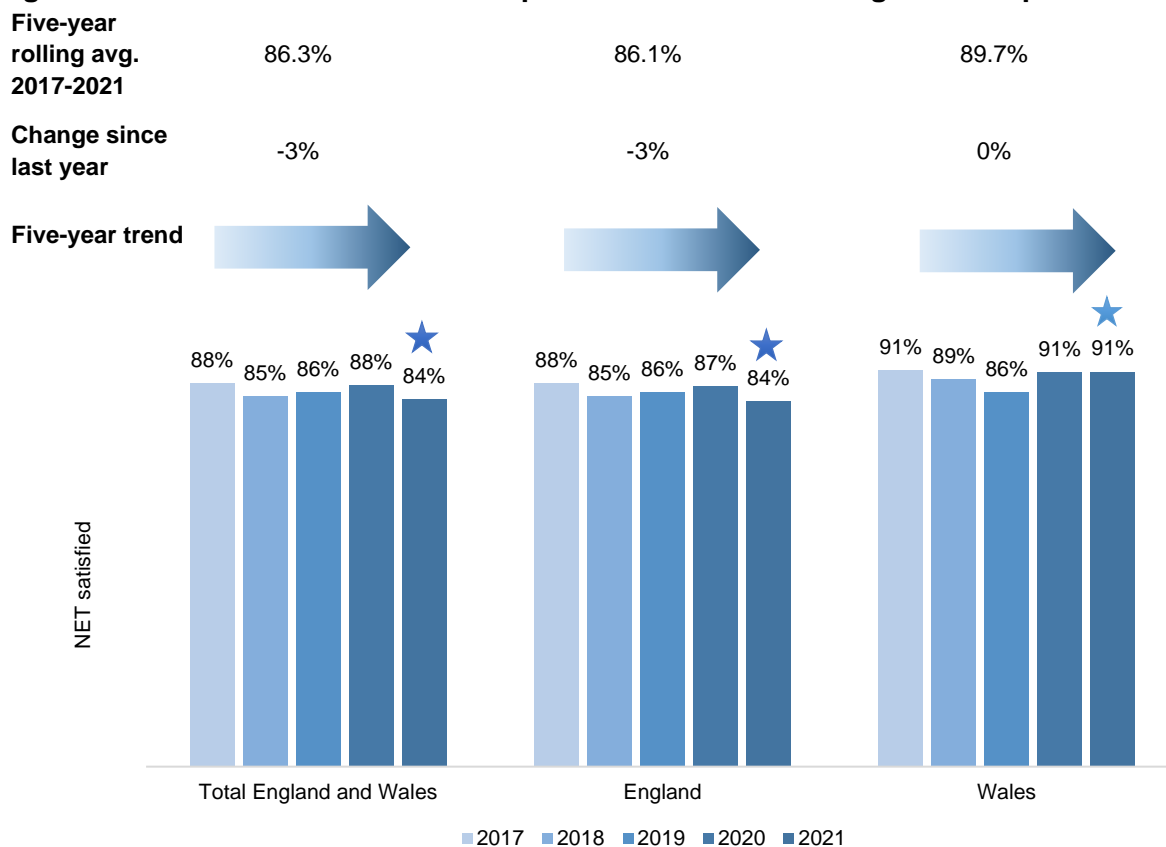


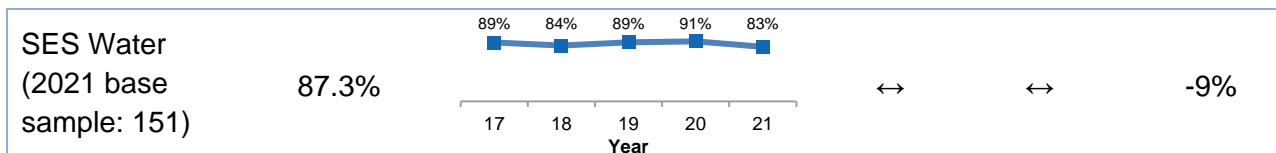
Table 54: Satisfaction with overall experience of water/sewerage service provider – WaSCs

Satisfaction with overall experience	Five-year rolling company average	Five-year company trend	Five-year trend	Company Average vs WaSC Average	Change Since Last Year
Industry (2021 base sample: 5410)	86.3%	88% 85% 86% 88% 84%	↔	n/a	-3%
Total WaSCs (2021 base sample: 3753)	86.0%	88% 85% 86% 87% 84%	↓	84%	-3%
Anglian Water (2021 base sample: 351)	86.3%	90% 85% 84% 87% 86%	↔	↔	-2%

Dŵr Cymru Welsh Water (2021 base sample: 400)	89.8%	<table border="1"> <thead> <tr> <th>Year</th> <th>Performance (%)</th> </tr> </thead> <tbody> <tr><td>17</td><td>91%</td></tr> <tr><td>18</td><td>90%</td></tr> <tr><td>19</td><td>86%</td></tr> <tr><td>20</td><td>91%</td></tr> <tr><td>21</td><td>91%</td></tr> </tbody> </table>	Year	Performance (%)	17	91%	18	90%	19	86%	20	91%	21	91%	↔	↑	0%
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Table 55: Satisfaction with overall experience of water/sewerage service provider – WoCs

Satisfaction with overall experience	Five-year rolling company average	Five-year company trend	Five-year trend	Company Average vs WaSC Average	Change Since Last Year
Industry (2021 base sample: 5410)	86.3%	<p>88% 85% 86% 88% 84%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	n/a	-3%
Total WoCs (2021 base sample: 1657)	87.4%	<p>88% 87% 87% 90% 85%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	85%	-5%
Affinity Water Central (2021 base sample: 154)	85.6%	<p>84% 85% 85% 87% 86%</p> <p>17 18 19 20 21</p> <p>Year</p>	↑	↔	0%
Affinity Water East (2021 base sample: 150)	85.2%	<p>89% 80% 87% 87% 83%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%
Affinity Water South East (2021 base sample: 150)	83.1%	<p>83% 89% 82% 83% 79%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-3%
Bristol Water (2021 base sample: 300)	91.5%	<p>93% 92% 92% 91% 90%</p> <p>17 18 19 20 21</p> <p>Year</p>	↓	↔	-1%
Cambridge Water (2021 base sample: 150)	90.3%	<p>92% 88% 93% 90% 89%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-1%
Essex & Suffolk Water (2021 base sample: 150)	87.8%	<p>85% 89% 89% 92% 85%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-7%
Portsmouth Water (2021 base sample: 150)	88.7%	<p>90% 89% 89% 93% 83%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-11%
South East Water (2021 base sample: 151)	85.8%	<p>89% 85% 82% 88% 84%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-4%
South Staffs Water (2021 base sample: 150)	88.0%	<p>93% 85% 90% 91% 81%</p> <p>17 18 19 20 21</p> <p>Year</p>	↔	↔	-9%



8.2 Likelihood to recommend water company

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

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

Table 56 below shows the NPS for WaSCs, followed by Table 57 for WoCs based on likelihood to recommend them as a provider of water services.

Table 56: Likelihood to recommend water company as a provider of water services – WaSCs

NPS Score	2014	2015	2016	2017	2018	2019	2020	2021
			17		18		19	20
Dŵr Cymru	37	38	33	38	44	38	49	40
Hafren Dyfrdwy	n/a	n/a	n/a	n/a	25	23	32	32
Northumbrian	35	31	32	40	38	37	41	30
Severn Trent	27	16	19	22	20	22	40	21
South West	-20	-7	3	-7	-10	-6	16	7
Southern	9	-2	5	-3	-7	-4	-6	-19
Thames	4	0	-4	1	6	-9	-4	-9
United Utilities	27	21	14	23	16	21	29	18
Wessex	30	25	14	28	18	33	37	16
Yorkshire	33	34	20	38	38	33	34	26

Table 57: Likelihood to recommend water company as a provider of water services – WoCs

NPS Score	2014	2015	2016	2017	2018	2019	2020	2021
Affinity Central	15	3			-1			-12
Affinity East	18	5	-1	12	6	19	7	-3
Affinity South East	3	1	5	-5	0	-4	3	-5
Bristol	14	23	-1	31	24	29	32	16
Cambridge	26	25	21	17	29	17	7	9
Essex & Suffolk	12	20	14	18	25	19	34	3
Portsmouth	35	19	6			35		

South Staffs	21	43	31	27	13	24	37	20
SES	24	18	6	10	10	7	17	2

8.3 Likelihood to recommend sewerage company – WoCs

As they receive services from two different companies, customers of WoCs were also asked how likely they would be to recommend the WaSC providing their sewerage services to friends and family using the same scale of 0 to 10. This is shown in Table 58 below shows the results WoCs by each wastewater provider.

Table 58: Likelihood to recommend sewerage company as a provider of sewerage services – WoCs

NPS Score	2014	2015	2016	2017	2018	2019	2020	2021
Affinity Central						7		-21
Affinity East		3	-3	2		21	10	-13
Affinity South East		-3	-16	-9		-5	-2	-38
Bristol		25	-6	28		22	31	10
Cambridge		10	5	17		17	8	-7
Essex & Suffolk		16	-5	14		20	32	-4
Portsmouth		3	4	22		4	19	-47
South East		13	-22	3		-4	-11	-25
South Staffs		39	1	20		20	31	9
SES		10	-17	-1		-3	6	-24

Appendices

A1. Sample profile – 2021

		Unweighted		Weighted	
		No	%	No	%
Gender ²⁶	Male	2464	46%	2475	46%
	Female	2946	54%	2935	54%
Age	18-29	95	2%	158	2%
	30-44	601	11%	688	13%
	45-59	1991	37%	2019	37%
	60-74	1747	32%	1640	30%
	75+	976	18%	936	17%
SEC	Higher managerial, administrative & professional occupations	2562	47%	2570	48%
	Intermediate Occupations	1072	20%	1078	20%
	Routine & manual occupations	1278	24%	1267	23%
	Long term unemployed/ student	372	7%	372	7%
	Refused	126	2%	123	2%
Household Composition	With children	1145	21%	1188	22%
	Without children	4209	78%	4167	77%
Ethnicity	White	5125	95%	5027	93%
	Mixed	50	1%	88	2%
	Asian	81	1%	110	2%
	Black	35	1%	79	1%
	Other	23	1%	16	1%
Disability in household	Yes	1463	27%	1411	26%
	No	3886	72%	3940	73%
Type of accommodation	Owner occupied	4566	84%	4483	83%
	Private rental	275	5%	318	6%
	Council tenant	219	4%	236	4%
	Housing Association tenant	215	4%	234	4%
	Leaseholder	25	0%	30	1%

²⁶ Unweighted figures within +/- 5% target for gender, age and SEC.

		Unweighted		Weighted	
		No	%	No	%
Meter in household	Yes	3117	58%	2999	55%
	No	2205	41%	2313	43%
Meter fitting (where meter present)	Already fitted	1361	44%	1276	43%
	Requested fitting	1066	34%	1085	36%
	Fitted as part of a metering scheme	605	19%	568	19%
Income	Up to £199 a week/Up to £10399 a year	320	6.0%	331	6.0%
	From £200 to £299 a week/ From £10400 to £15599 a year	524	10.0%	501	9.0%
	From £300 to £499 a week/ From £15600 to £25999 a year	743	14.0%	736	14.0%
	From £500 to £699/From £26000 to £36399 a year	643	12.0%	646	12.0%
	From £700 to £999 a week/ From £36400 to £51999 a year	647	12.0%	707	13.0%
	From £1000 to £1399 a week/ From £52000 to £72799 a year	458	8.0%	469	9.0%
	From £1400 to £1999 a week/ From £72800 to £103999 a year	276	5.0%	310	6.0%
	£2000 and above a week/ £104000 and above a year	212	4.0%	233	4.0%
Receive benefits	Yes	950	18%	999	18%
	No	4265	79%	4230	78%
Internet access	Yes	4985	92%	4982	92%
	No	410	8%	413	8%
Urbanicity	Urban	1563	29%	1671	31%
	Rural	1673	31%	1589	29%
	Suburban/semi-rural	2096	39%	2066	38%

A2. Questionnaire



DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH
Tel: 01663-767857 – JN 7325 V1, 2020-21

Introduction

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

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

Could you spare some time to answer some questions?

READ OUT IF NECESSARY

Survey Details

The survey should take around 20 minutes. We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict Market Research Society Code of Conduct.

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

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

Screener Questions

S1 DELETED		
ASK ALL Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: S3 In terms of how you pay your water bills, do you have sole responsibility for paying them, shared responsibility or no responsibility? If respondent says they pay their water will as part of their rent, code as 4. READ OUT		
I have sole responsibility	1	S4
I share payment of the bills	2	S4
I am not the water bill payer in my household	3	S2
I pay my water bill as part of my rent	4	S2
Other (specify)	80	S4
Don't know	85	S2
ASK IF NO/DON'T KNOW AT S1. OTHERS GO TO S2 S2 Is there somebody else in the household who is the bill payer? SINGLE CODE		
Yes	1	RETURN TO INTRO
No	2	CLOSE
Don't know	85	
ASK ALL S4 Do you or any member of your family work in....: READ OUT		
The water industry i.e. work for a water company	1	Thank and close
A consumer organisation e.g. Passenger Focus, Energy Ombudsman	2	close

	Which?, Citizens Advice	3	
	Market Research	4	D1
	None of the above	87	
ASK ALL			
D1 Please record the gender of the respondent DO NOT ASK			
	Male	1	
	Female	2	
ASK ALL			
D2 Can you please tell me your age? PROMPT WITH BANDS IF NECESSARY			
CODE AGE INTO CORRECT BANDING. SINGLE CODE			
	18-19	1	
	20-24	2	
	25-29	3	
	30-44	4	
	45-59	5	
	60-64	6	
	65-74	7	
	75+	8	
	Refused	86	SCREEN OUT
ASK IF CODE 5-8 AT D2. OTHERS GO TO D4a			
D3 Are you retired? SINGLE CODE			
	Yes	1	
	No	2	
	Refused	86	
ASK ALL			
D4NEW: At home, do you have:			
READ OUT AND CODE FOR EACH			
a) Telephone landline, b) Access to broadband			
	Yes	1	
	No	2	
	Don't know	86	
IF D4aa_1 (IF HAVE A LANDLINE)			
D4b Do you use your landline for telephone calls?			
	Yes	1	
	No	2	
IF D4aa_86 (DON'T KNOW) OR IF D4b_2 (DON'T USE LANDLINE FOR CALLS)			
D4c Do you use a mobile for telephone calls?			
	Yes	1	
	No	2	
MOBILE SAMPLE INCLUDES: D4aa_2 (NO TELEPHONE LANDLINE) OR D4aa_1 (TELEPHONE LANDLINE) AND D4b_2 (DON'T USE FOR TELEPHONE CALLS) AND D4c_1 (USE MOBILE FOR CALLS) OR IF D4aa_86 (DON'T KNOW) AND D4c_1 (USE MOBILE)			
READ OUT: The next few questions are about your occupation. These questions will assist with us with analysing the results by different demographics to ensure CC Water fully understand views by all household types			

<p>ASK ALL Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job. D5 Do you (did you) work as an employee or are you (were you) self-employed? SINGLE CODE. READ OUT IF NECESSARY</p>		
<p style="text-align: right;">Employee 1 Self-employed with employees 2 Self-employed/freelance without employees 3 Not applicable - Long term unemployed/never worked 4 Not applicable - Full time student 5</p>		<p style="text-align: right;">D6 D7 D9 Q1a Q1a</p>
<p>ASK ALL EMPLOYEES (D5/1) D6 How many people work (worked) for your employer at the place where you work (worked)? READ OUT IF NECESSARY</p>	<p style="text-align: right;">1-24 1 25 or more 2</p>	<p style="text-align: right;">D8</p>
<p>ASK ALL EMPLOYERS (D5/2) D7 How many people do (did) you employ?</p>	<p style="text-align: right;">1-24 1 25 or more 2</p>	<p style="text-align: right;">D8</p>
<p>ASK ALL EMPLOYEES (D5/1-2) D8 Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)</p>	<p style="text-align: right;">Yes 1 No 2</p>	<p style="text-align: right;">D9</p>
<p>ASK ALL EMPLOYED (D5/1-3) D9 What do you do for work? If you are not working now, what did you do in your last job? SINGLE CODE ONLY. DO NOT READ OUT – USE PROMPTS WHERE NECESSARY.</p> <p>Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer 1</p> <p>Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse 2</p> <p>Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive 3</p> <p>Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver 4</p> <p>Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant 5</p> <p>Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff 6</p> <p>Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican 7</p> <p>Traditional professional occupations such as: accountant – solicitor – medical practitioner – scientist – civil/mechanical engineer 8</p> <p>Refused 86</p> <p>INTERVIEWER NOTE - IF RESPONDENT REFUSES READ OUT: I would like to reassure you that this information is only being collected to make sure we have a good mix of people included in the survey, it will not be used for any other</p>		<p style="text-align: right;">Continue – but will need to screen out once we hit</p>

purpose. On this basis would you be happy to tell me about the sort of work you do, or if you're not working now, what you did in your last job?		the first refusal quota.
ASK ALL Q1a Who is your water company? (This may be a company which deals with your sewerage too.) SINGLE CODE		
DO NOT READ OUT COMPANY FROM SAMPLE. IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS"		
Anglian Water Services Ltd 1 Dŵr Cymru Cyfyngedig (Welsh Water) 2 Northumbrian Water Ltd 3 Severn Trent Water Ltd 4 South West Water Ltd 5 Southern Water Services Ltd 6 Thames Water Utilities Ltd 7 United Utilities Water Plc 8 Wessex Water Services Ltd 9 Yorkshire Water Services Ltd 10		Q2
----- Water only companies Bournemouth Water Plc 11 Bristol Water Plc 12 Cambridge Water Company Plc 13		Q3
----- Cholderton & District Water Company Ltd 14		CLOSE
----- Essex & Suffolk Water 16 Affinity Water South East 17 Hartlepool Water Plc (interviewer: may be known as Anglian) 18 Portsmouth Water Plc 19 South East Water Plc (including Mid Kent Water Plc) 20 South Staffordshire Water Plc 21 SES Water (Sutton & East Surrey Water Plc) 22 Affinity Water East 23 Affinity Water Central 23		Q3
----- Hafren Dyfrydwy 24		
----- Stated water company differs from sample 26 Don't know		Go to Q3
----- Don't know 25 85		Go to Q1b Go to Q1b
ASK IF DON'T KNOW/STATED COMPANY DIFFERS AT Q1A OTHERS GO TO FILTER AT Q2 Q1b Is your postcode <insert from sample>? Yes, same as sample 1 Incorrect – Enter correct postcode (first part and first digit of second part) 2		GO TO Q1c
IF CODE 2 AT Q1b POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE		
ASK IF DON'T KNOW AT Q1A OTHERS GO TO FILTER AT Q2 Q1c In your area, your water company is likely to be [insert name of water company]. Does that sound right?		GO BACK AND CODE Q1A THEN TO FILTER AT Q2

----- Yes No	1 2	CLOSE -----
ASK IF CODES 1-10 AT Q1A. OTHERS GO TO FILTER AT Q3 Q2 And do they also provide your sewerage services, or do you have a septic tank? INTERVIEWER NOTE: PLEASE CLARIFY IF ASKED. It's a tank in your garden which collects waste from toilets etc and has to be emptied by a specialist company every so often.		
Provide sewerage services Have septic tank Different company provides my sewerage services Don't know	1 2 3 85	GO TO Q6 CLOSE GO TO Q6
Q1a2 AND Q1a3 DELETED		
ASK IF CODES 11-24 or 26 AT Q1a. OTHERS GO TO FILTER AT Q6 Q3 Do you have a septic tank?		
----- Yes No	1 2	Q6 Go to Q4 if codes 11-24 at Q1a. Go to Q5a if code 26 at Q1a (Hafren)
ASK IF CODE 2 AT Q3. OTHERS GO TO FILTER AT Q6 Q4 Were you aware that your sewerage services are provided by another company?		
----- Yes No	1 2	Q5a Q5b
ASK IF CODE 1 AT Q4, or 2 at Q3 if Hafren = water company at Q1a. OTHERS GO TO FILTER AT Q5b Q5a And who is your sewerage company? ADD IF NECESSARY: the bill from your water company will also say who provides your sewerage services. SINGLE CODE IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS		
Anglian Water Services Ltd Dŵr Cymru Cyfyngedig (Welsh Water) Northumbrian Water Ltd Severn Trent Water Ltd Southern Water Services Ltd South West Water Ltd Thames Water Utilities Ltd United Utilities Water Plc Wessex Water Services Ltd ----- Yorkshire Water Services Ltd ----- Hafren Dyfrdwy ----- Stated company differs to sample Don't know	1 2 3 4 5 6 7 8 9 10 ----- 12 ----- 11 85	Q6 ----- Q5b ----- Q5b
Scripting note: If water company is Hafren and sewerage company is not either Hafren or Welsh Water, close.		
IF Q4_2 (NO) OR Q5A_85 (DON'T KNOW) OR Q5_11 (STATED COMPANY DIFFERS TO SAMPLE) REFER TO SAMPLE AND ASK: Q5b Is your postcode <insert postcode from sample>?		

	Yes, same as sample	1	
	Incorrect – Enter correct postcode (first part and first digit of second part)	2	Q5c
Q5c In your area, your sewerage company is likely to be [insert name of water company]. Does that sound right?	Yes	1	GO BACK & CODE Q5a THEN TO Q6 CLOSE
	No	2	
ASK ALL Q6 Does your household have a water meter? SINGLE CODE	Yes	1	
	No	2	
	Don't know	85	
Q7a – Q8c PARKED			

Company Information

ASK ALL Q9 Thinking now about value for money, how satisfied or dissatisfied are you with the <u>value for money</u> of the <u>water services</u> in your area? SINGLE CODE. READ OUT AND CODE FOR EACH AND THERE SHOULD BE 6 RESPONSE CODES FOR EACH			
DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (HAVE SEPTIC TANK) Q10 And the sewerage services in your area?	Very satisfied	1	
	Fairly satisfied	2	
	Neither satisfied nor dissatisfied	3	
	Fairly dissatisfied	4	
	Very dissatisfied	5	
	Don't know	85	
	Q11 PARK 2021		
	Q12 PARK 2021		
Q13a AND Q13b PARKED 2018			
ASK ALL Q14 How much do you agree or disagree that the [CODE 2 AT Q2 OR 1 AT Q3 = 'water']/[ALL OTHERS = water and sewerage] charges that you pay are fair? SINGLE CODE. READ OUT IF NECESSARY	Strongly agree	1	
	Tend to agree	2	
	Neither agree nor disagree	3	
	Tend to disagree	4	
	Strongly disagree	5	
	Don't know	85	
Q15 PARKED 2018			
ASK ALL Q16a How much do you agree or disagree that the [CODE 2 AT Q2 OR 1 AT Q3 = 'water']/[ALL OTHERS = 'water and sewerage'] charges that you pay for are affordable to you? SINGLE CODE. READ OUT IF NECESSARY	Strongly agree	1	
	Tend to agree	2	

Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	85	
Q16b, Q16c, Q16d Parked		
SWW £50 GOVERNMENT CONTRIBUTION – Q PARKED		
Q16e Has your household's financial situation changed since last year? Would you say that your household finances are...? SINGLE CODE. READ OUT		
Slightly worse		
Significantly worse		
Slightly better		
Significantly better		
Unchanged		
Don't know		

Section B: Consumer Rights and Responsibility

ASK ALL Q18 How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill? READ OUT. SINGLE CODE		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	85	
ASK IF WATER METER (CODE 1 AT Q6). OTHERS GO TO Q20 Q19 You said earlier that your household had a water meter, which of the following apply to you? SINGLE CODE		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
Had no choice - water company fitted one as part of a metering scheme	3	
Other (specify)	80	
Don't know	85	
Q20a Are you aware that your water company offers reduced bills to some households who, due to their financial circumstances, would sometimes struggle to pay their bills?		
Yes	1	
No	2	
Don't know	85	
<u>DO NOT ASK SOUTHERN WATER (Q1_6) OR SOUTH EAST WATER (Q1_20) CUSTOMERS</u> ASK IF Q6_2/85 AND IF NOT IN CM POST CODE LIST (SEE Q20 POSTCODE EXCEL FILE SAVED IN SAMPLE & DATA FOLDER) Q20B – IN ADDITION, DO NOT ASK THOSE POSTCODES IN FILE TITLED Q20B ADDITIONAL POSTCODES TO EXCLUDE		WILL BE Routed FROM POST-CODE
Q20 Were you aware that ...: SINGLE CODE FOR EACH STATEMENT Scale: 1=Yes, 2= No, 85= Don't know		
a) If you ask for a meter to be fitted, your water company will install one free of charge		
b) You have up to two years to decide whether you prefer the meter or would like to go back to a water rate charge for your property		

INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is already charged for water via a meter you cannot go back to a water rate charge.		
<p>ASK ALL</p> <p>Q21 Are you aware of or are you currently on [CODE 2 or 26 AT Q1a = 'Welsh Water Assist/WaterSure Wales' /ALL OTHERS = 'WaterSure'] tariff >? This was introduced to help people in low income groups who need to use a lot of water</p> <p>READ OUT. SINGLE CODE</p>	<p>Yes, have heard of it but do not need it 1</p> <p>Yes, have subscribed to it 2</p> <p>No, but would like to know more 3</p> <p>No, but do not need it 4</p> <p>Don't know 85</p>	
Q22 PARK 2021		
Q24 PARKED		
<p>ASK ALL</p> <p>Q25 Are you aware of any additional free services (also known as priority services) offered by your water company, such as large print or braille bills for people who need them, passwords to check that company callers are genuine, or liaison with customers on dialysis who need a constant supply of water? READ OUT. SINGLE CODE</p>	<p>Yes, have heard of it but do not need it 1</p> <p>Yes, have subscribed to it 2</p> <p>No, but would like to know more 3</p> <p>No, but do not need it 4</p> <p>Don't know 85</p>	
Q26 PARKED		
Q27a AND Q27b PARKED IN 2018		
<p>ASK ALL</p> <p>Q28 Have you contacted your water / water and sewerage company in the past 12 months? SINGLE CODE</p> <p>INTERVIEWER PLEASE CONFIRM</p>	<p>Yes – water and sewerage company 1</p> <p>Yes – water company 2</p> <p>Yes – sewerage company 3</p> <p>----- No 4</p> <p>Don't know 85</p>	<p>Q29</p> <p>----- Q33a</p>

ASK IF YES AT Q28 (CODES 1-3).		
Q29 What was your most recent contact about? DO NOT READ OUT.		
MULTICODE OK		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	
To make an enquiry about sewers and drains (responsibility)	4	
General billing enquiry	5	
Billing enquiry	6	
No supply/supply issue	7	
To report a leak	8	
To ask for a water meter	9	
Water quality	10	
Water pressure	11	
Sewerage problem	12	
Been told I will have to have a water meter (no choice)	13	
To enquire about hosepipe ban	14	
To ask about help with paying bills for people who are behind with payments	15	
To say I've moved house	16	
To ask about help with paying bills (not behind with payments)	17	
Other (please specify)	80	
Don't know	85	
Q32 AND Q33a-c PARKED		
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ3a		
Q30 Thinking about the contact you made, overall how satisfied were you with.... READ OUT EACH STATEMENT & SINGLE CODE. ROTATE STATEMENTS. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS		
Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.		
a) The ease of contacting someone who was able to help you		
b) The quality/ clarity of information provided		
c) The knowledge and professionalism of staff		
d) The feeling that your contact had been, or would be, resolved		
e) The way that the water company has kept you informed of progress with your enquiry/complaint/claim		
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO NQ3a		
Q31 Taking everything into account, overall how satisfied or dissatisfied were you with this contact? SINGLE CODE. READ OUT IF NECESSARY		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	85	

<p>ASK ALLNQ3a How well does your water company (if a WOC and codes 11-25 or Hafren and Welsh Water), or codes 1-10 (WaSC) and septic tank (Q2 code 2) OR Hafren and tank / water and sewerage company (if codes 1-10 – WaSC and Q2 code 1 or 85 (no septic tank) communicate with you about its services and plans, and the availability of help with bills, and Priority or additional services on a scale from 1-5 where 1 indicates that their communication is very good and 5 indicates that it is very poor.</p>	<p>Very good 1 Fairly good 2 Neither good nor poor 3 Fairly poor 4 Very poor 5 Don't know 85</p>	
<p>ASK NQ3/1-5 NQ3b2021 Why do you say that? DO NOT READ OUT. MULTICODE</p> <p>Never had a problem with communication 1 Kept informed of service disruptions/interruptions 2 Satisfied with the amount of communication I receive 3 Information comes with my bill 4 Not had any communication/correspondence 5 Don't recall any communication/correspondence apart from bill 6 Unaware of help with bills or additional priority services support/tariffs offered 7 Don't get regular correspondence 8 I don't need/want any 9 Already receive regular communications 10 They send me information – it's there if I want it 11 Other (please specify) 80 Don't know 85</p>		
<p>ASK ALL NQ1a Thinking about customer service more generally, including the bills you get, frequency of bills, meter readings and the different ways to pay, how satisfied are you with the customer service of your [CODES 11-24 AT Q1a OR HAFREN AND WELSH WATER = 'water'] / [CODES 1-10 AT Q1a OR HAFREN AND HAFREN OR HAFREN AND SEPTIC TANK = 'water and sewerage'] company? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		
<p>ASK IF NQ1a=4/5 NQ1b Why do you say that you are dissatisfied with the customer service? VERBATIM COMMENT</p>		

Section C: Water on Tap

<p>ASK ALL Q34 How satisfied are you with the following aspects of your water supply: READ OUT EACH STATEMENT & SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS</p> <p>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 98= not applicable.</p>		
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	The colour and appearance of your tap water	1	
	Taste and smell of tap water	2	
	Hardness/softness of your water	3	
	The safety of your drinking water	4	
	The reliability of your water supply	5	
	Your water pressure	6	
ASK ALL			
Q35 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your <u>water</u> supply? SINGLE CODE. READ OUT IF NECESSARY			
	Very satisfied	1	
	Fairly satisfied	2	
	Neither satisfied nor dissatisfied	3	
	Fairly dissatisfied	4	
	Very dissatisfied	5	
	Don't know	85	
Q36b & Q37a/b PARKED			
ASK ALL			
NQ2 How confident are you that in the longer term your water supply will be available without restriction, that is, not subject to hosepipe bans or other restrictions on use? SINGLE CODE. READ OUT IF NECESSARY			
	Very confident	1	
	Fairly confident	2	
	Neither confident nor unconfident	3	
	Fairly unconfident	4	
	Very unconfident	5	
	Don't know	85	
ASK IF NQ2/1-5			
NQ2b Why do you say that? DO NOT READ OUT. MULTICODE			
	Should spend more on new infrastructure (e.g. water storage/reservoirs/water network/grid)	1	
	Less water in future due to climate change	4	
	Less water in future due to population growth	5	
	Too much water lost to leaks/leaks need fixing	6	
	Trust my company to manage this	10	
	It rains a lot so not a real problem	11	
	Never had a problem	14	
	I live near a river/reservoir so never seen/heard of any problems	15	
	Other (please specify)	80	
	Don't know	85	
	NQ4a Park 2021		
	NQ4b Park 2021		

Section D: Keeping it Clean

Q38 PARKED 2018		
<p>ASK IF Q2/1 or 85 OR Q3/2 (NO SEPTIC TANK)</p> <p>Q39 How satisfied are you with your sewerage company's management of the following aspects of their sewerage service.....: READ OUT EACH STATEMENT AND SINGLE CODE. READ OUT IF NECESSARY. DO NOT READ OUT NUMBERS</p> <p><i>Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85 = don't know 98 = not applicable.</i></p> <p>a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning wastewater properly before releasing it back into the environment d) Minimising sewer flooding</p>		
<p>ASK IF Q2/1, 85 OR Q3/2 (NO SEPTIC TANK)</p> <p>Q40a Taking all those aspects into account, overall how satisfied or dissatisfied are you with your <u>sewerage</u> service? SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		
Q40b PARKED		
<p>ASK ALL</p> <p>Q40c Now thinking about your overall experience of ['water and sewerage services' IF "(Q1a/1-10) and (Q2/1,85)) or ((Q1a/26) and Q5a/12)"/[ALL OTHERS 'water supply'] - including the provision of ['water and sewerage' IF "(Q1a/1-10) and (Q2/1,85)) or ((Q1a/26) and Q5a/12)"/[ALL OTHERS 'water']" as well as charges, customer services and billing - how satisfied or dissatisfied are you?</p> <p>SINGLE CODE. READ OUT IF NECESSARY</p> <p>Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		
	Park Q40d	
	Q41 PARK 2021	
<p>ASK ALL</p> <p>Q42 How much do you agree or disagree that your water [IF CODES 1-10 AT Q1A AND Q2/1, 85 OR HAFREN AND HAFREN also insert 'and sewerage'] company cares about the service it gives to customers? READ OUT IF NECESSARY. SINGLE CODE</p> <p>Strongly agree 1 Tend to agree 2 Neither agree nor disagree 3 Tend to disagree 4 Strongly disagree 5 Don't know 85</p>		

Q43 PARK 2021		
ASK ALL		
Q44a How much do you trust your [CODE 2 AT Q2 OR 1 AT Q3 OR CODES 11-24 AT Q1a OR HAFREN + WELSH OR HAFREN + SEPTIC TANK = 'water'] / [ALL OTHERS = 'water and sewerage'] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all		
Do not trust them at all	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Trust them completely	10	
Don't know	85	
Park Q44b, Q44c		
Q45 PARK 2021		
Park Q45a, Q45b		
Q46 AND Q47 PARKED		
ASK ALL		
Q48a If it were possible to choose your water supplier, on a scale of 0-10, where 0 means you wouldn't be likely to recommend, and 10 means you would be extremely likely to recommend, taking everything into account, how likely would you be to recommend ['insert code given at Q1a'] to friends and family as a provider of water (WaSCs without septic tank (Q2/1, 85) OR HAFREN AND HAFREN: and sewerage) services? SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	
ASK ALL WoCs (Q1a/11-24 AND HAFREN + WELSH) without septic tank (Q3/2)		
Q48b		
And on the same scale, how likely would you be to recommend ['insert code given at Q5a'] to friends and family as a provider of sewerage services?		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	

Q154 AND Q155 PARKED		
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Section E: Speaking up for Water Consumers

Q49 – Q54 PARKED		
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NEW SECTION: Environmental behaviours

The next few questions are about environmental behaviours.

ASK ALL

NQ5a

I am going to read out some environmental behaviours that people may or may not do. Out of these four activities, which do you put most effort into doing? And which is next? SINGLE GRID (DO NOT ALLOW ATTRIBUTE TO BE CODED 1 AND 2). Interviewer: Please read out all behaviours before asking which they put the most effort into and the next most effort into

Column headings

- First
- Second

Statements

- Recycling at home
- Saving water at home
- Saving energy at home
- Reducing my carbon footprint by e.g. buying less new things, second hand, using public transport

ASK ALL

NQ5b

I am going to read out some environmental behaviours that people may or may not do. Out of these four activities, which do you put “least” effort into? SINGLE RESPONSE. READ OUT

- Recycling at home
- Saving water at home
- Saving energy at home
- Reducing my carbon footprint by e.g. buying less new things, second hand, using public transport

<p>ASK ALL NQ5c You indicated that you undertake... [INSERT RANK 1 FROM NQ5a] the most. Are any of the following reasons why you do this more than the other things? READ OUT. MULTI CODE.</p> <ul style="list-style-type: none"> • It saves me money • I don't like waste • It's a habit/I've always done it • It's easy to do • It's better for the environment/Climate change • I know more about this issue than the other things • It's the right thing to do • Something else (Please tell us why) • Don't know (DO NOT READ OUT) 	<p>1 2 3 4 5 6 7 8 80 85</p>	
<p>ASK IF SAVING WATER IS SELECTED AT NQ5b NQ5d You indicated that you make less effort to save water than for some of the other environmental behaviours. Why is this? Do not prompt. MULTI CODE</p> <ul style="list-style-type: none"> • I don't think about this as affecting the environment • Other things are better for helping the environment • It doesn't save me enough money • Water doesn't cost as much as other utilities • It's too important to my lifestyle to do this (i.e. like to be able to run the water as long as I like for showers, baths etc) 	<p>1 2 3 4</p>	

<ul style="list-style-type: none"> • I can't easily check how much water I am using • I can't do enough to make a difference • It's not something I have thought about before • We are not short of water in this country so it doesn't matter/it rains all the time • I know more about the other issues (e.g. recycling, energy) • Something else (SPECIFY) • Don't know (DO NOT READ OUT) • None of these (DO NOT READ OUT) 	5 6 7 8 9 80 85 87	
<p>NQ5e: Which of the following things, if any, would encourage you personally to save more water? READ OUT, CODE ALL THAT APPLY. ROTATE LIST</p> <ul style="list-style-type: none"> • Put me on a water meter (UNMETERED – Q6/2,85) ○ Help me understand how I can save water ○ Explain how the water everyone uses affects the environment • Increase my water charges • Restrict my water use when it is scarce (for example, introduce hosepipe bans) • Make saving water easier e.g. fit things at my home which reduce my water use by taking up less water like special taps and showers • Give me a lower bill for saving water • None of these • Don't know (Do not read out) 	1 2 3 4 5 6 7 87 80	

Section F: Background

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

D3, D5-D9 MOVED TO FRONT		
ASK ALL		
Q55 How would you describe your ethnic background? PROMPT IF NECESSARY. SINGLE CODE		
White: British	1	
White: Irish	2	
White: Any other White background	3	
Mixed: White and Black Caribbean	4	
Mixed: White and Black African	5	
Mixed: White and Asian	6	
Mixed: Any other Mixed background	7	
Asian or Asian British: Indian	8	
Asian or Asian British: Pakistani	9	
Asian or Asian British: Bangladeshi	10	
Asian or Asian British: Any other Asian background	11	
Black or Black British: Caribbean	12	
Black or Black British: African	13	
Black or Black British: Any other Black background	14	
Chinese	15	
Other (specify)	80	
Refused	86	

<p>ASK ALL</p> <p>Q56 Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do? MULTICODE OK FOR CODES 1/2</p>	<p>Yes (self) 1 Yes (other) 2 No 3 Don't know/refused 85</p>	
<p>ASK ALL</p> <p>Q57 Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household? READ OUT SINGLE CODE</p> <p>[Scale: 0 = none, 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 86= refused.</p> <p>a) Adults i.e. 18 years and over b) Children aged 6 – 17 c) Children aged 0-5</p>		
<p>ASK ALL</p> <p>Q57aNEW- Could you tell me which of the following bands your household income falls into from all sources before tax and other deductions. READ OUT. SINGLE CODE</p> <p>Up to £199 a week/Up to £10,399 a year 1 From £200 to £299 a week/From £10,400 to £15,599 a year 2 From £300 to £499 a week/From £15,600 to £25,999 a year 3 From £500 to £699/From £26,000 to £36,399 a year 4 From £700 to £999 a week/From £36,400 to £51,999 a year 5 From £1,000 to £1,399 a week/From £52,000 to £72,799 a year 6 From £1,400 to £1,999 a week/From £72,800 to £103,999 a year 7 £2,000 and above a week/£104,000 and above a year 8 Don't know 85 Refused 86</p>		
<p>ASK ALL</p> <p>Q58 And are you/someone in your household currently receiving any benefits or tax credits? SINGLE CODE</p> <p>Yes 1 No 2 Don't know 85 Refused 86</p>		
<p>ASK ALL</p> <p>Q59 What type of accommodation do you live in? READ OUT SINGLE CODE</p> <p>Owner occupied 1 Private rental 2 Council tenant 3 Housing Association tenant 4 Leaseholder 5 Don't know 85 Refused 86</p>		

ASK ALL Q60 Would you say you live in an urban or rural area? READ OUT.SINGLE CODE	Urban 1 Rural 2 Suburban/semi rural 3 Don't know 85	
ASK ALL WHO ANSWER NO/DK AT D4NEWb (D4NEW_2/2,86). PN autofill to 'Yes" (code 1) for those who are D4NEW_2/1. Q61 Do you have access to the internet?	Yes 1 No 2 Don't know 85 Refused 86	
ASK IF CODED 3 AT Q21 OR Q25. OTHERS GO TO Q63 Q62 You said you would like to know more about additional services from your water company. To find out more, you can call ['insert code given at Q1a'] on [RELEVANT NUMBER FROM TABLE BELOW].		
ASK ALL Q63 Would you be happy to be re-contacted for future research projects on behalf of CCW (Consumer Council for Water)?	Yes 1 No 2	

Thank you for sparing the time to take part.

This survey was conducted on behalf of CCW(Consumer Council for Water) and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.

Should you wish to contact CCW you can call their national enquiries line on 0121 345 1000 or visit their website at www.ccw.org.uk

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

CCW

The voice for water consumers
Llais defnyddwyr dŵr

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