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The voice for water consumers
Llais defnyddwyr dŵr

Water Matters:
Highlights Report 2021



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Foreword

We are living in changing times. Last year, our Water Matters Highlights report focussed on how the Covid-19 pandemic shaped people’s experiences of their water and wastewater services, and what companies needed to do in response - especially in relation to providing greater support for those who were struggling.

This year, the picture has continued to change. People’s financial situations are becoming even more precarious as inflation increases to its highest levels in four decades and the cost of living rises. The Water Matters survey data reflects these circumstances.

In the middle of so much uncertainty, it is vital that water companies focus on delivering their basic services really well, providing people with practical support, financial assistance and clear communications. We want services to continue to improve so, this year, we’ve decided to look at Water Matters data with these themes in mind. We’ll be using this data to work with companies, to share best practice and encourage improvement.

One of our four long-term objectives is affordability. The need for a single water affordability scheme that consistently helps people who are struggling to pay – regardless of where they live – has never been more critical. This year, one in ten people in England, and one in eight in Wales, felt that their water and sewerage charges were unaffordable. This is a

significant increase on last year, when around one in fourteen people overall were struggling to pay.

More worrying still, subsequent research suggests that this position has worsened since the Water Matters survey was carried out. This suggests that people’s financial situations are worsening and highlights the need for water companies to be agile in their responses.

In addition to offering people financial support, companies also need to provide other assistance when needed. This is especially true for the small number of people that experience extreme service failures such as sewer flooding, or are repeatedly suffering from low pressure or interruptions to their water supply.

Finally, as part of their basic operations, it is vital that companies are proactive about communicating clearly with people about what services they offer, any work that they plan to carry out, and what is happening during any unplanned incidents.

Foreword	3
Overview of Water Matters	4-7
Introduction	8-9
Affordability and our End Water Poverty campaign	10-11
End sewer flooding misery	12-13
Don’t let people suffer in silence	14-15
People and the environment	17-19
To sum up	20-21

Overview of Water Matters results

This is the eleventh year of Water Matters. Over this time, there has been an upwards trend in several key metrics, including value for money and perceptions of affordability. This suggests that people generally retain positive views of their water and sewerage services. This year, however, the results reflect rapidly changing circumstances. We have set out some of the highlights from this year's report below. The full set of results is in our [data report here](#).

- At 91%, satisfaction with overall water services remained very high in 2021. This has been consistent over the last eleven years.
- Satisfaction levels for different aspects of water supply service, including the quality, safety and reliability of the water supply and water pressure, ranged from 96% - 85%, apart from 'hardness/softness' of water which is consistently lower (63% satisfied in 2021). These are significant¹ reductions for all measures since last year.
- Overall satisfaction with sewerage services decreased significantly in 2021. 78% of people were satisfied with their sewerage services, compared to 85% in 2020. The eleven-year trend changed from flat to downward.
- Satisfaction with different elements of sewerage services, maintaining sewers and drains, reducing smells, cleaning wastewater and minimising sewer flooding, ranged from 74% - 55%. Satisfaction has decreased significantly since 2020, in all of these areas.
- Satisfaction with value for money decreased from 76% to 75% for water services in 2021; and from 78% to 76% for sewerage services.
- In 2021, 62% of people perceived their charges to be fair, which was a significant decrease on 2020 (69%).
- Overall, 76% of people agreed that their charges were affordable. This was significantly fewer than 82% in 2020. Around one in ten people felt that their bills were unaffordable.
- In 2021, 58% said their household finances were unchanged over the last year, a significant decrease from 2020 (63%). Over one third said they had got worse and the remaining 9% said they had got better.
- 71% of people were confident that their water supply will be available in the longer term without restriction, which was a significant decrease on 2020 (75%).

- 63% of people agreed that their water company cares about the services that they provide – which is significantly lower than 71% in 2020.
- People's trust in water companies over the last eleven years increased. However, the mean score in 2021 is 7.33, which is the lowest score since 2011².
- 69% would be likely to contact their water company if they had a problem with their bill, which has reduced from 73% last year. However, the number of people who said they actually contacted their companies increased by 1% to 19% in 2021.
- 78% of those that contacted their water company in the previous 12 months, were satisfied with the contact which is the same as in 2020.
- Awareness of the extra help offered to people in vulnerable circumstances through water companies' Priority Services Registers increased, from 43% in 2020 to 48%.
- Average awareness of the financial support offered by WaterSure/WaterSure Wales³ has increased significantly over eleven years, from 7% in 2011 to 13% in 2021.
- Overall satisfaction with customer services (relating to frequency and content of bills, meter reading, and payments) decreased slightly from 80% in 2020 to 78% in 2021.
- People's satisfaction with their overall experience of water and/or sewerage services (including the provision of services as well as charges, customer service and billing) dropped to 84% from 88% in 2020. This is the lowest level since the question was introduced in 2017.
- 50% of people said that the communication from their water company was good. This is significantly lower than 54% in 2020.



¹ The significance of a change will depend on the size of the sample being analysed. Hence, smaller changes will be significant if a sample is large but not significant if a sample is small.

² People rated trust on a scale from 1 to 10, where 1 is 'do not trust them at all' to 10 'completely trust them'. The figures reported are the average of all trust scores.

³ WaterSure is a system set up to provide a reduction in charges for people on a low income and whose water is supplied by a meter. WaterSure Wales was previously known as Welsh Water Assist.

Table 1: Views in England and Wales in 2021

Measure	England	Wales
Satisfaction with overall water services	91%	93%
Satisfaction with overall sewerage services	77%	86%
Satisfaction with value for money of water services	75%	79%
Satisfaction with value for money of sewerage services	75%	83%
Perceive charges to be fair	62%	62%
Agree charges are affordable	76%	77%
Consider financial situation has got worse over last 12 months	34%	36%
Confident water supply will be available in long-term without restriction	71%	81%
Agree their water company cares	63%	73%
Level of trust in water company	7.30	7.76
Likely to contact if they have a problem with their bill	70%	67%
Actually contacted the company in the previous 12 months	19%	16%
Satisfaction with contact that was made in the last twelve months	78%	80%
Awareness of Priority Services Register	48%	47%
Awareness of WaterSure/WaterSure Wales	13%	15%
Overall satisfaction with customer services	78%	81%
Satisfaction with overall experience of water and sewerage services	84%	91%
Say that communication from company is good	50%	53%



Introduction

We have looked at the Water Matters data in the context of the themes of the following CCW strategic priorities:

- End Water Poverty campaign
- End Sewer Flooding Misery campaign
- Repeat service failures, the focus of our Don't Let People Suffer In Silence campaign
- People and the environment

Specifically, we wanted to understand how the Water Matters data can develop our understanding of people's views, as well as helping us deliver improvements in these key areas.

In general, people's views and perceptions of water company services have been consistent over time, with only small changes in year-on-year figures and often no change in the direction of long-term trends. However, the Covid-19 pandemic and increases in the cost of living have affected people's lives. Many of the long-term trends have stayed the same in 2021 and it may be too soon to understand if there are any long-term changes in people's opinions. However, this year has seen significant drops in many key metrics.

Although these changes may be short-lived and, in some cases, do not affect the long-term trend, they are pronounced in places and reflect what people are thinking at the moment. If companies want to improve perceptions, there is no room for complacency. They will need to be proactive in addressing people's concerns as personal circumstances continue to change.

Water customers are not alone in expressing their dissatisfaction with services. Ofgem's research into [Customer perceptions of the energy market](#) for Q4 of 2021-22 was conducted in January this year. This found that people's overall satisfaction with energy, at 70%, had reduced by 2% on the previous quarter. There was also a significant increase in the proportion of people who had affordability concerns, at 41%, up by 8% on the previous quarter.

Awareness of the financial support provided by WaterSure and the WaterSure Wales schemes has increased and, at 13%, is at its highest ever level

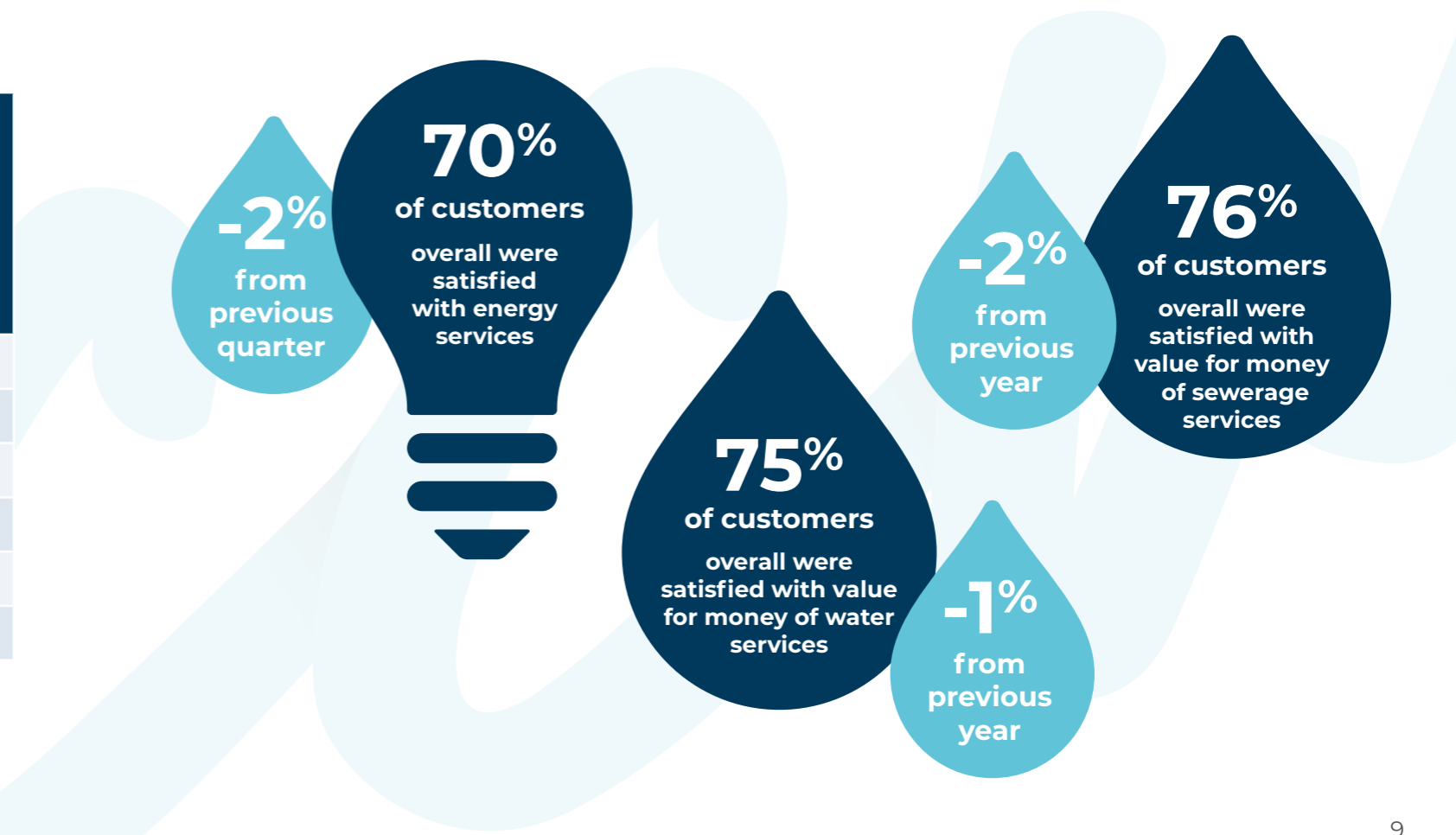
across England and Wales. Companies should build on the [positive communications we have seen to date](#) and continue to improve the way they tell people about the support that is available.

In the past, we have highlighted how the scores relating to 'trust' and 'care' are indicators of how people engage with their water companies. The figures in table 2 suggest that companies can do more to prevent a further decline in their relationship with their customers. In the current, changeable climate, companies need to be prepared to think differently to keep up with changes in customers' needs and priorities. This includes providing meaningful financial support during these challenging times, as well as high quality, reliable services and clear information about what further help and advice is available to people, and when.

Table 2: Comparison with last year

Measure	2020	2021	Long-term trend
Satisfaction with value for money of water services	76%	75%	↘
Satisfaction with value for money of sewerage services	78%	76%	↘
Agree that water and/or sewerage charges are fair	69%	62%	→
Agree that water and/or sewerage charges are affordable	82%	76%	↘
Water and sewerage companies care about service provided to people	71%	63%	→
Level of trust in water companies*	7.87	7.33	↘

* This figure is at its lowest level since 2014.



Affordability and our End Water Poverty campaign

With the cost of living rising, especially in relation to energy bills and increases in inflation, it is not surprising that the number of people concerned about being able to afford their water bills has significantly increased among people of all socio-economic groups since last year.

When we compare Water Matters data with other research, it shows affordability is changing, and getting worse over time. In Water Matters, 34% of people in England and 36% of people in Wales said that their household finances had worsened over the last year. This compares with 27% in England and 23% in Wales who said this last year. By way of comparison, Ofwat's research, [Cost of living - water customers' experiences](#), was undertaken immediately after the date that Water Matters fieldwork finished. This found that 42% of people across England and Wales reported that their financial situation was worse compared to a year earlier, indicating that people's perceptions of affordability are worsening.

This is why it is important for companies to get the right support mechanisms in place and communicate effectively with people about their options. The challenge will be for companies to ensure that they continue to offer help to those most in need and increase this support where they can. As part of our End Water Poverty campaign, we are working with companies to implement a single water affordability scheme across England and Wales; and to create a fairer system for anyone who is struggling to pay their water bills.

Last year's Water Matters data helped us to identify several groups that were significantly more likely to have affordability concerns than the rest of the customer base, including households with disabled people living in them and those from minority ethnic communities. As the pressures on people's budget increase, this year's data shows us that households that are already feeling the pinch – those that feel they are financially worse off in comparison with last year – are also more likely to have affordability concerns.

Reassuringly, the awareness of WaterSure and WaterSure Wales has increased, from 9% last year to 13% in England and from 10% to 15% in Wales. This is a significant increase and the 11-year upwards trend for this issue is encouraging. Awareness of water companies' priority services, which provide extra help for people in vulnerable circumstances, increased significantly from 44% to 48% in England and from 41% to 47% in Wales.

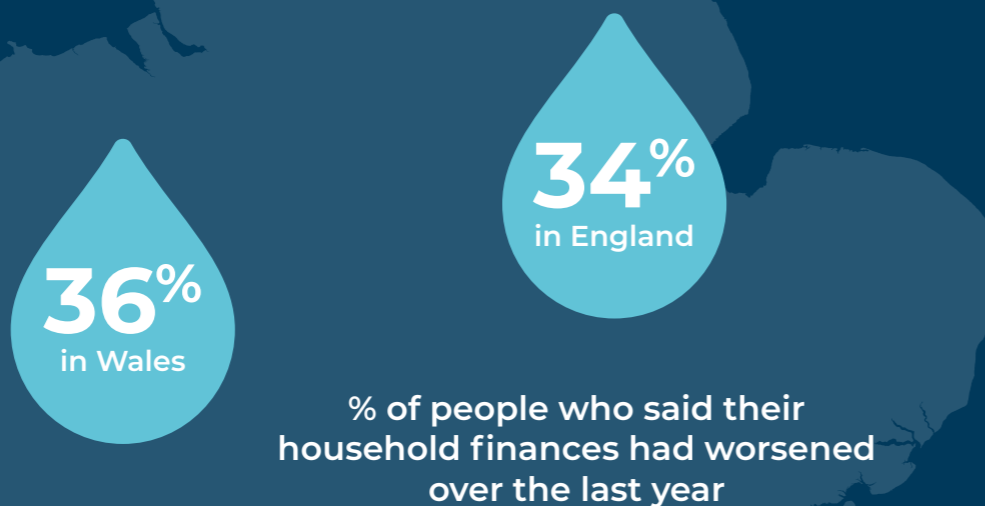
We welcome the actions that companies have taken to raise awareness of the help that is available to people, and companies can build on

this to drive improvements in awareness across the customer base - particularly for those people who have the greatest affordability concerns.

The data shows affordability concerns are growing at pace and progress has been made to raise awareness of current support. The need for a single water affordability scheme has never been more pressing. Not only would it provide comprehensive support, it would also be a fairer scheme and easier to publicise under a single brand for people across England and Wales.

Table 3: Views on affordability

Group	Feel that charges are unaffordable	
	2020	2021
Higher managerial/administrative/professional ⁴	4%	7%
Intermediate occupation	8%	10%
Routine and manual occupation	9%	12%
Unemployed/ never worked/ student	11%	22%
Disabled and/or with a disabled person living in the household	11%	17%



Awareness of water companies' priority services, which provide extra help for people in vulnerable circumstances, increased:



⁴ Higher managerial covers occupations such as finance managers, teachers and social workers. Intermediate covers occupations such as retail and restaurant managers, nursery nurse, call-centre agent. Routine manual covers occupations such as HGV drivers, machinists and bar staff.

End Sewer Flooding Misery

Companies are working to adapt to post-pandemic challenges and it is vital that, as part of this, they don't lose sight of people who are suffering from extreme service failures.

Through our End Sewer Flooding Misery campaign, we are focussing on making sure that companies provide more support for those who suffer from sewer flooding.

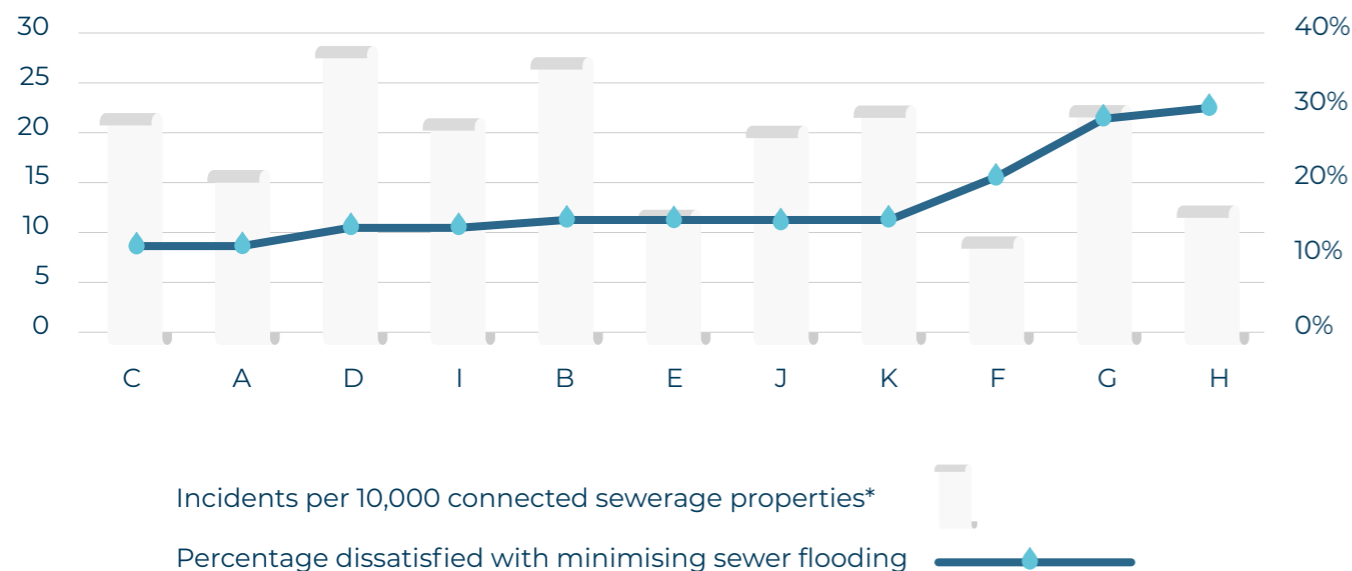
In Water Matters this year, there has been a drop in satisfaction with how water companies tackle sewer flooding, from 77% in England and 80% in Wales to 63% and 72% respectively. This is not surprising in a year when there have been some significant real-life flooding events. For example, people in the south east of England where some of these events occurred are significantly more

likely to be very dissatisfied on this issue. In England, the eleven-year trend in satisfaction is downwards, although it is flat in Wales.

The chart below compares people's perceptions of water companies' performance on tackling sewer flooding to the actual number of sewer flooding events per company. This suggests that there is not a direct link between a single company's actual performance on this issue and how people perceive their performance. Instead, people's perceptions are based on wider factors, including broader sectoral performance.

In reality, the number of people who are directly affected by sewer flooding events is a relatively small percentage of the population. Those who do not experience sewer flooding will form their opinions of a company's performance based on a range of factors. Media coverage and word of mouth play a part in this but company communications, and direct engagement through local events, play an important part in informing people. In turn, this may help to drive views on satisfaction by showing the value of the services water companies provide.

Perceptions of sewer flooding compared to number of events



* Based on figures reported by companies as part of their yearly data submissions to CCW.



To be effective, companies need to understand the people that they serve and how their communication needs differ across different customer groups. Companies may benefit from looking into other ways that people form opinions on sensitive topics, and using them proactively to share important messages.

Good service on sewer flooding is not just a case of reducing the number of physical incidents. Transparency and clear communication are a vital part of water companies' basic services. This means that water companies must engage with people, to show that they care and to encourage them to rely on and trust the water company as a source of comprehensive support, assistance and information.

In general, people do not want to be overwhelmed with information. One way that companies could improve trust is by making sure that people know exactly how they can access clear information, when they most need it and as easily as possible. For some people, such as customers in vulnerable

circumstances or those who find it difficult to go online, this may mean creating more tailored routes of information, so all consumers have access to support and services that are accessible and inclusive to all. CCW's [Vulnerability Manifesto](#) sets out how we are working with companies to remove the barriers that prevent some people from accessing non-financial assistance.

We are also campaigning to improve the support and communication provided to victims of sewer flooding, especially those who have suffered repeat flooding. Both our Water Matters research and our recent joint report with Ofwat '[Customer Experiences of Sewer Flooding](#)' suggests there is a lot of work to be done in this area. We are working with companies to improve the support people receive after being flooded by sewage and, as part of this, will we will work with the companies to share learning points and adopt better support measures for victims.

Don't Let People Suffer in Silence

Satisfaction with water pressure was 86% in England and 90% in Wales. Over eleven years, the trend in England has been downwards while the trend in Wales has been upwards.

This graph below reflects our research, [Under pressure: the gap between performance and expectations](#), where we set out how people's views on satisfaction do not necessarily relate to their company's actual performance. However, people who are dissatisfied with their water pressure are significantly more likely to be dissatisfied with the following:

- Contact with the water company
- Overall water services
- Value for money of both water and sewerage services

People who are dissatisfied with their water pressure are also less likely to agree that charges are fair or that communications from their companies are good and they are less likely to trust their water companies. All of which suggests that people's experience of water pressure is colouring their wider views.

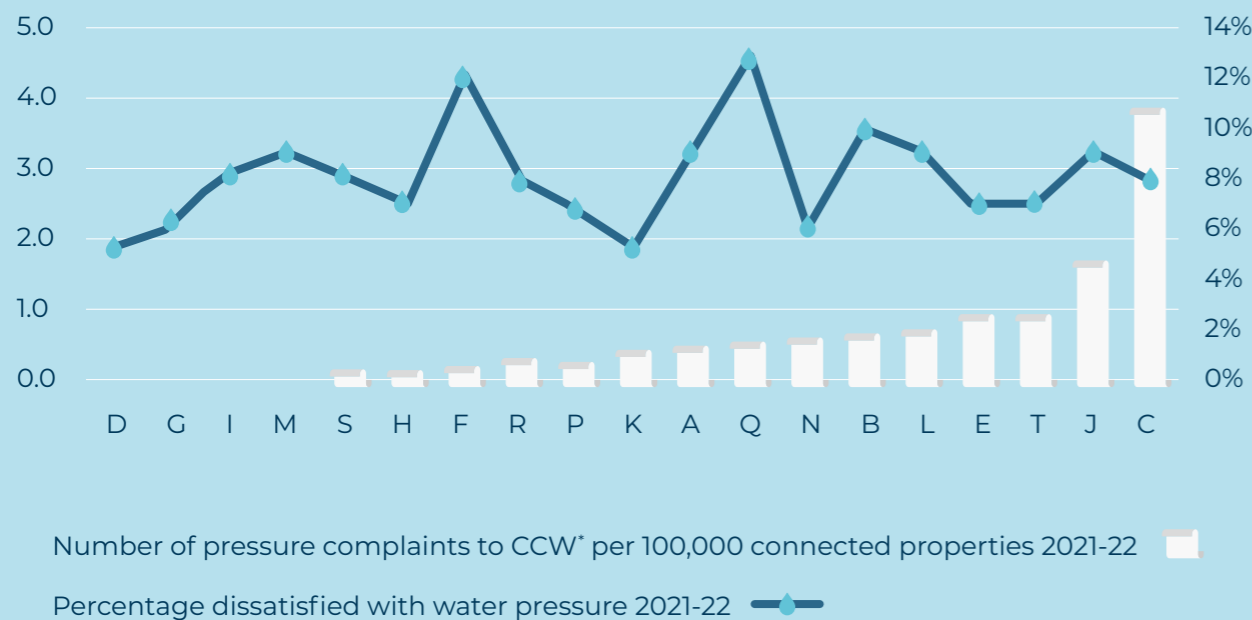
In many ways, problems with water pressure, even if they are repeated, are less likely to be urgent in the same way that, say, a sewer flooding event would be. So it seems likely that people may have not raised complaints about this issue in the same way.

People are much more likely to just put up with repeated incidents of low pressure or

supply failures. If company complacency leads to people suffering in silence, then dissatisfaction can become entrenched.

As part of our Don't Let People Suffer in Silence programme, we are encouraging people to speak up and ask for help when they are suffering. We are working with companies to agree an effective and consistent framework for recording repeated low pressure and supply interruption contacts, with a specific focus on repeat contacts. With this in mind, we will introduce questions that look at the reasons why people might not talk to their company about either poor pressure or supply interruptions.

Perceptions of pressure performance compared to number of pressure complaints to CCW*



Number of pressure complaints to CCW* per 100,000 connected properties 2021-22

Percentage dissatisfied with water pressure 2021-22

* Information taken from CCW's complaints database



People and the environment

We have explained how communicating clearly is part of a company's basic services. One area where this is particularly important is the environment.

This year's Water Matters figures show that people's satisfaction with their water company's cleaning of wastewater before releasing it back into the environment has fallen significantly, from 78% in 2020 to 55% in England, and from 80% to 66% in Wales.

The increase in dissatisfaction is likely, in part, to be influenced by media coverage and the announcement of regulatory investigations on this issue last year, including during the period of time that the Water Matters fieldwork was being carried out.

Our recent report, [Awareness and perceptions of river water quality](#), showed that companies need to do more to inform people about what role water companies play in tackling spillage from storm overflows. Run-off from roads and other sources are often bigger causes of river pollution but 35% of customers saw sewage as the biggest problem⁵.

In addition to this, in Water Matters, we asked customers for their views on the potential for water shortages in the future, and asked them to explain why they had that view. Awareness of issues is quite low. Of those respondents who were not confident that water will be available without restriction in the longer term, only 31% referred to climate change as a major issue while 10% mentioned population growth. We recently launched an [easy-to-use tool](#) to help people understand the pressure on water resources in their local area.

Companies have a clear role to play in caring for and maintaining the environment as part of their day-to-day business but people are generally under-informed about this work. Companies need to do everything they can to close the gap in people's understanding of these issues. We know that even when people are aware of the impact their use of water at home can have on the wider water environment, few are taking action to change their behaviours to minimise the impact they may be having.

In general, people respond better to requests for action if they see that water companies are 'doing their bit', too. For example, by tackling sewer flooding in a timely and effective way, companies can increase people's confidence in their performance and this may help to build trust. As part of this, it is vital that companies keep their customers informed about the services that they provide and action that they are taking.

We are encouraging companies to be more transparent and accountable about their environmental performance as part of our People and the Environment programme of work.

⁵ No significant difference between England and Wales.

People and the environment

In recent years, we have developed the Customer Engagement (CE) score to map how well companies engage with the people they serve on various issues.



We calculate our Customer Engagement score by following the Principal Components Analysis methodology, which creates a single score from a combination of the following measures, each with the underlying theme of engagement:

- Likelihood of contacting their water company if they are worried about paying their bill
- Awareness and/or subscription to additional help/services
- Awareness and/or subscription to WaterSure/WaterSure Wales and other special tariffs
- Awareness of their right to revert for free/meter for free
- Whether they made contact with water/wastewater company.

This year, the CE score is lower which means that, in spite of the challenging times, fewer people are engaging with their water company.

For example, this year only 69% said they would contact the company if they were in financial difficulty, compared with 73% last year. This is borne out by the numbers who have actually made contact with the company. While more say that they have contacted the company over the last year (19% up from 18%), fewer have asked about help with paying bills (only 2%, compared to 5% last year).

If people aren't reaching out for help when times are tough, it raises the question of how companies should best engage with people.



In our report, [Independent review of water affordability – one year on](#), we set out what companies have been doing to improve engagement on these issues. For example:

- Wessex Water shared [research](#) that will help companies to develop a simplified process for accessing support schemes;
- Dŵr Cymru Welsh Water and South Staffs and Cambridge Water led pilot schemes that looked at ways to make advice on customer bills more visible. Most other companies have already improved their own literature as a result of these schemes;
- All companies have taken steps to ensure that written communications are clearer.

We will continue to work towards implementing all of the recommendations of our [Affordability Review](#).

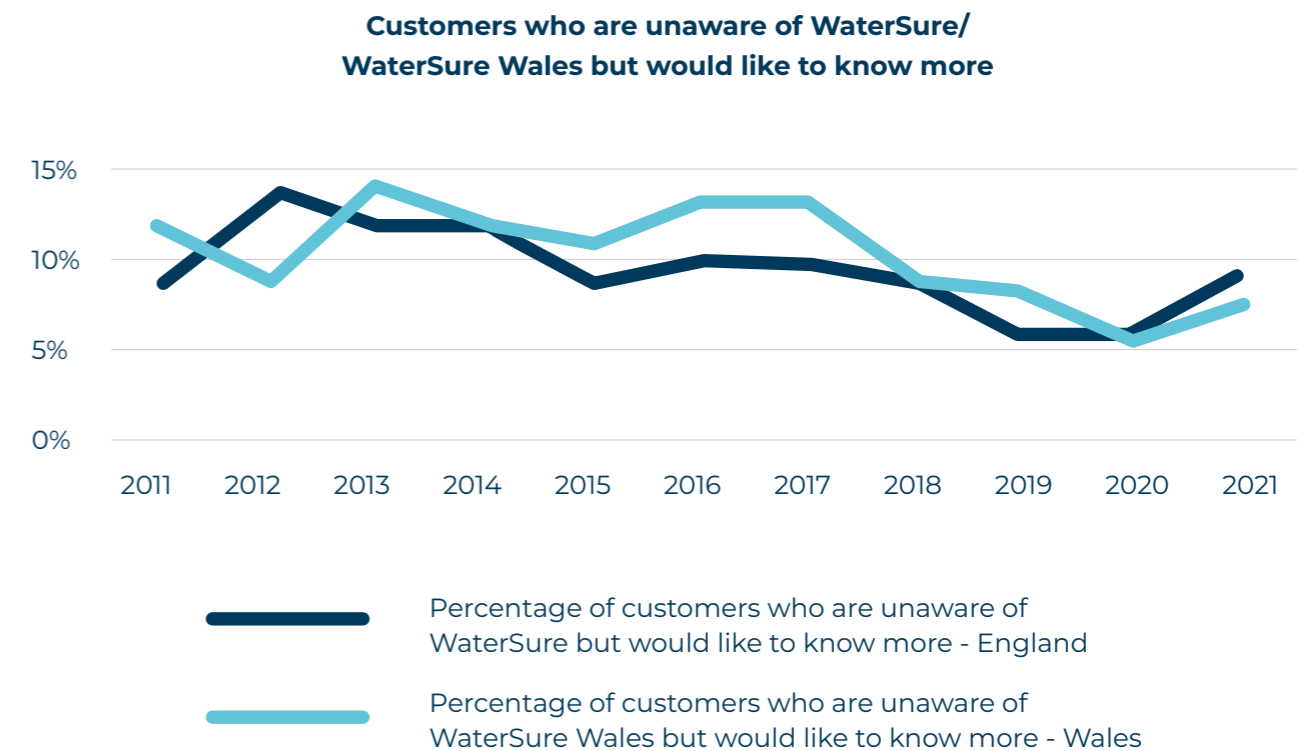
In Water Matters, we collect data about

the number of people who have not heard about WaterSure and WaterSure Wales but who want to know more. These people are likely to need support more than others.

As the chart shows, over the last eleven years, this figure has generally declined, which is good, but it increased last year. It is too early to say if this change in trend is permanent but it could be, in part, a response to the extraordinary pressures on households over

the last twelve months. We will be looking at this figure again in light of the work that we are doing with water companies to ensure that this decrease in awareness is only temporary.

Figure 3: Awareness of WaterSure/ WaterSure Wales



To sum up...

It is too soon to know how long-term trends may be affected but this year has seen some strong changes in people's views.

More people are in need of financial assistance and practical support and companies need to maintain their basic services, including keeping people informed about what help is available and what work they do to maintain consistent, reliable services. Some of the views and perceptions reflect wider concerns and not just people's direct experiences.

We will continue to work with companies to deliver the aims of the campaigns set out in our [2022 – 23 Strategy](#) and to ensure they offer the support their customers need, and that services continue to improve during these challenging times. Our 'asks' can be summarised as follows:

End Water Poverty

We are working with companies to introduce a single water affordability scheme. In addition to this, we are also working to improve the support that is already available to customers. As part of our End Water Poverty campaign, some companies have been [piloting schemes](#) aimed at helping to break down the barriers that can prevent people finding out about and accessing financial assistance and support, so that the information becomes more visible and accessible. Using local networks and deploying behavioural science are key ways that companies can improve how they offer advice.

Companies need to:

- Continue to evolve their engagement with those customers most at risk of financial vulnerability as a result of the changing economic situation, and learn from the affordability pilots that have explored this issue. As part of this, they may want to examine their company specific Water Matters data more closely, to see if it has any insights into knowledge gaps in their areas.

End Sewer Flooding Misery

We have already asked companies to commit to immediate, short-term and long-term action to improve their sewer flooding responses. We will also encourage them to adopt the recommendations in our [Customers' experiences of sewer flooding report](#).

Companies need to:

- Keep in focus the need to maintain good standards of service across all areas but especially in relation to communicating during extreme events that have the potential to have a significant physical, emotional and psychological impact. We would also like to see them sharing best practice, through a policy and best practice exchange. The Water Matters data can help provide the context for this.

Don't Let People Suffer in Silence

Part of our Don't Let People Suffer in Silence campaign, will be identifying the barriers that prevent people from making complaints about service issues such as low pressure and supply interruptions. In next year's Water Matters, we will ask additional questions to support this work and help us understand more about why people may not report the matters to their companies.

Companies need to:

- Consider how to map where problems with water pressure and supply interruptions are occurring, so that they can be proactive in identifying problems before customers are driven to making complaints.

People and the environment

The environment is an issue that many people can relate to, but they struggle to understand water companies' roles and the impact of their own behaviour. Companies have a clear role in caring for and maintaining the environment and they need to show people how they do this. If companies explain their role in a clear and transparent way, they will help people to understand the work that is being done, creating more positive perceptions of water companies and can encourage people to play their part in protecting the environment.

Companies need to:

- Provide clear explanations of their responsibilities towards the environment, and what action they are taking to fulfil these, both on their websites and as they engage with the communities they serve.

We will be working with companies to help them understand how to improve their engagement with people on the key issues affecting the environment.

Specifically, we will be talking to all sewerage companies to understand what is being done to communicate environmental performance and share good practice, so that the bar is raised overall.



The voice for water consumers
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