Customer Spotlight:
People's views and experiences of water
Wave two

Report for Ofwat and CCW
April 2024

Savanta:

Contents

Research aims and methodology

CCW, the statutory consumer organisation which represents the interests of water and sewerage customers in England and Wales, and **Ofwat**, the economic regulator of the water and wastewater sectors in England and Wales, jointly commissioned this research to understand and monitor people's views of water and the water sector across a broad range of measures including understanding, satisfaction, trust and engagement with services, and environmental awareness and behaviours.

The research was conducted 4 – 18 December 2023. Savanta surveyed 2,399 adults 18+ via an online survey. 2,095 respondents were based in England and 304 were based in Wales. The sample was weighted to be nationally representative of adults in England and Wales by gender, age (including gender and age interlocked), region, ethnicity and SEG.

This report also draws comparisons to Wave 1 of the Customer Spotlight research conducted 23 November – 14 December 2021, in which Savanta surveyed 2,951 adults aged 18+ via an online survey. 2,116 respondents were based in England and 507 respondents were based in Wales. The sample was weighted to be nationally representative of adults in England and Wales by gender, age, region, ethnicity and SEG.

Please also note that due to rounding, answer options may not add up to a sum equal of individual statements.

Where results are compared to Wave 1, statistically significant **increases** or **decreases** are indicated by an up or down arrow or box as below:

Key Findings: Changes since Wave 1

There has been a fall in both satisfaction with water and wastewater services and trust in companies to deliver on a range of activities since Wave 1:

Satisfaction

Six in ten (58%) report being satisfied with the **quality of water services** received (vs. 65% in Wave 1)

Just under half (49%) report being satisfied with the **quality of the wastewater and drainage services** received (vs. 56% in Wave 1)

Trust

Two in five (40%) agree that water providers are more interested in **profits** than providing a good service (vs. 33% in Wave 1)

Three in ten (31%) agree that they provide a **good service** (vs. 39% in 2021)

One in five (22%) agree that their services offer **value for money** (vs. 29% in Wave 1)

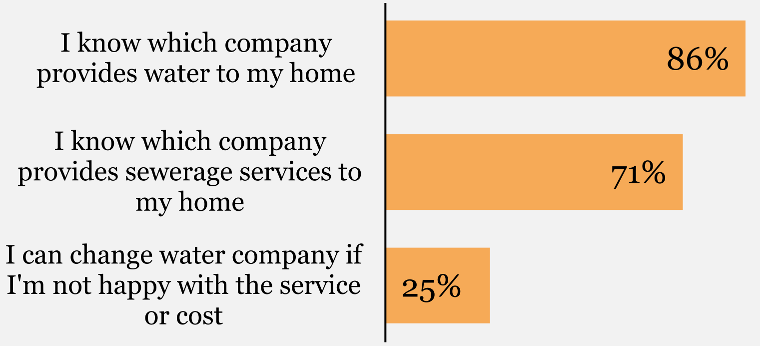
Environmental issues

Less than a quarter (23%) agree that they trust water providers to **do what's right** for the environment (vs. 31% in Wave 1)

One in five (21%) agree that providers **act in the interests** of the environment (vs. 27% in Wave 1)

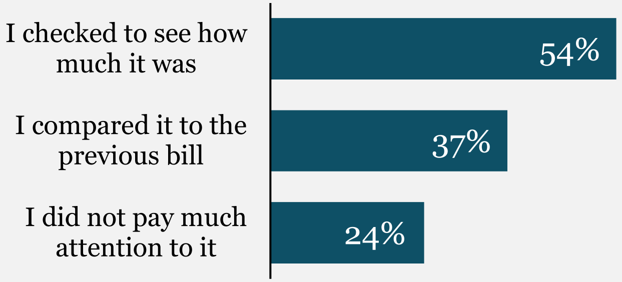
Customer Spotlight Wave 2: Key metrics

Respondents' **understanding** of the water industry



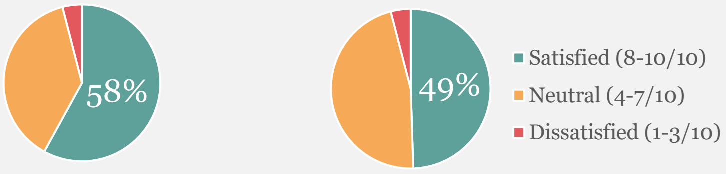
% agreeing with each statement (selecting strongly agree/agree)

Respondents' **engagement** with household water bills



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

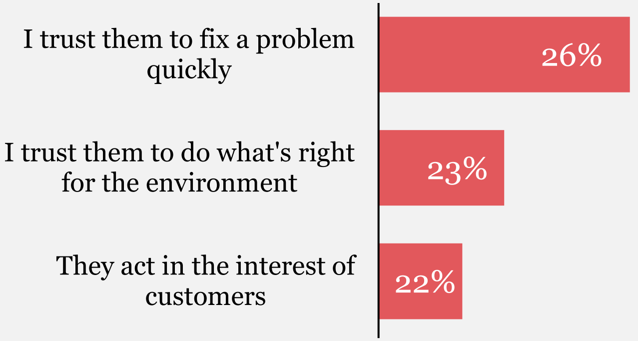
Respondents' **satisfaction** with their water provider



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

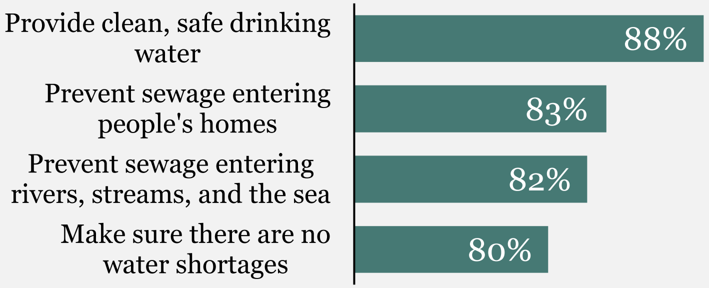
Satisfaction with the quality of the **wastewater and drainage services** received

Respondents' **trust** in their water provider



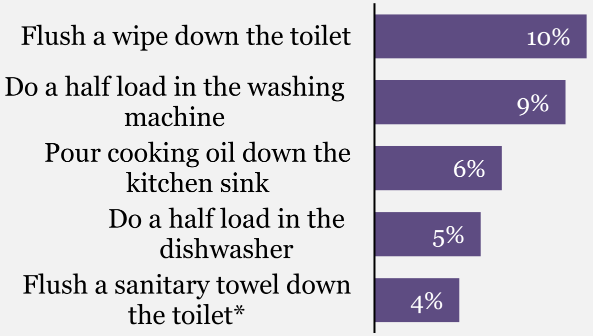
% selecting 8-10/10

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



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

Respondents' **environmental behaviours**

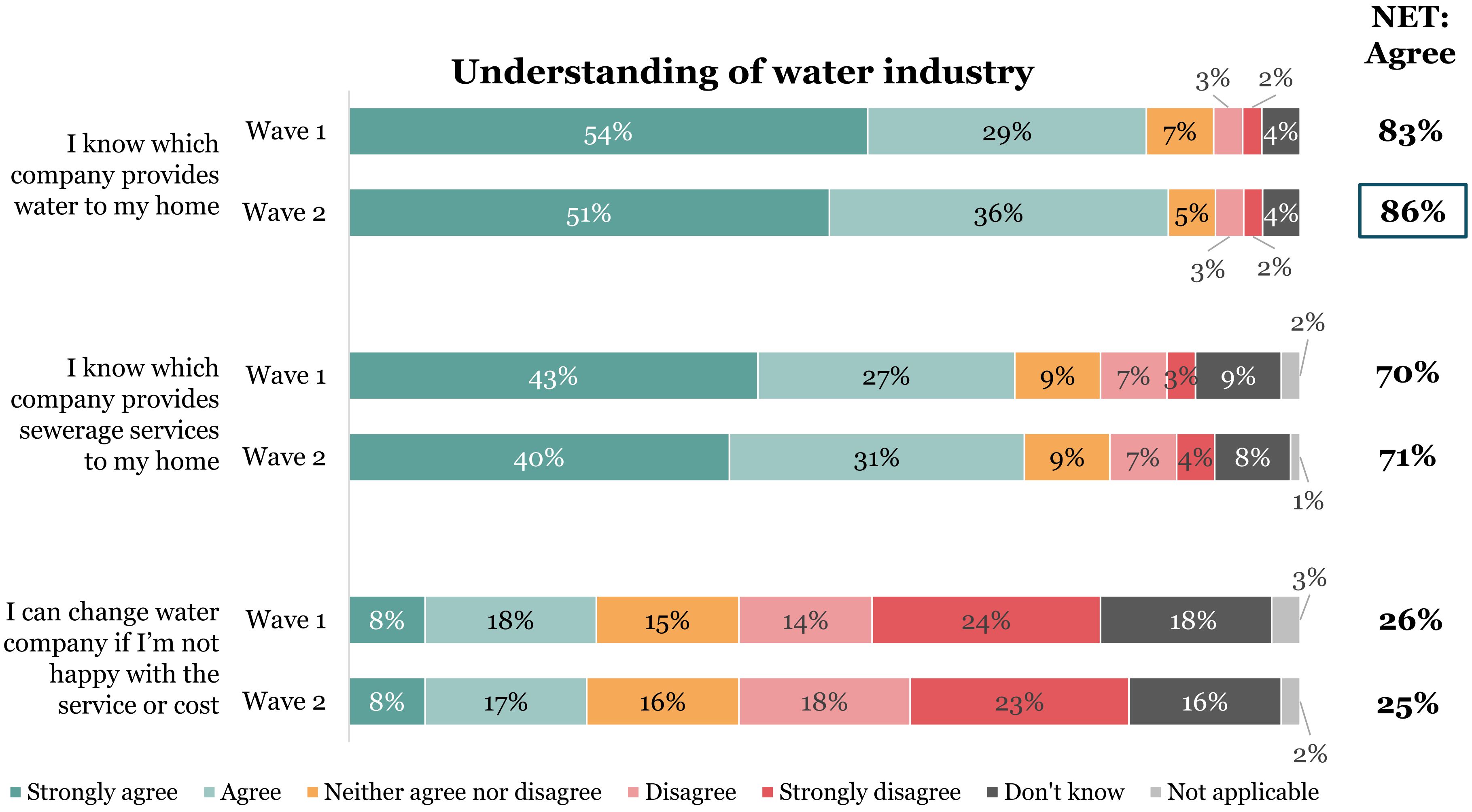


% doing this most of the time or every time

*Only asked of respondents who identify as female aged 54 and under.

Understanding of the water industry and its services

A large majority say they know which company provides water to their home, which has increased since Wave 1



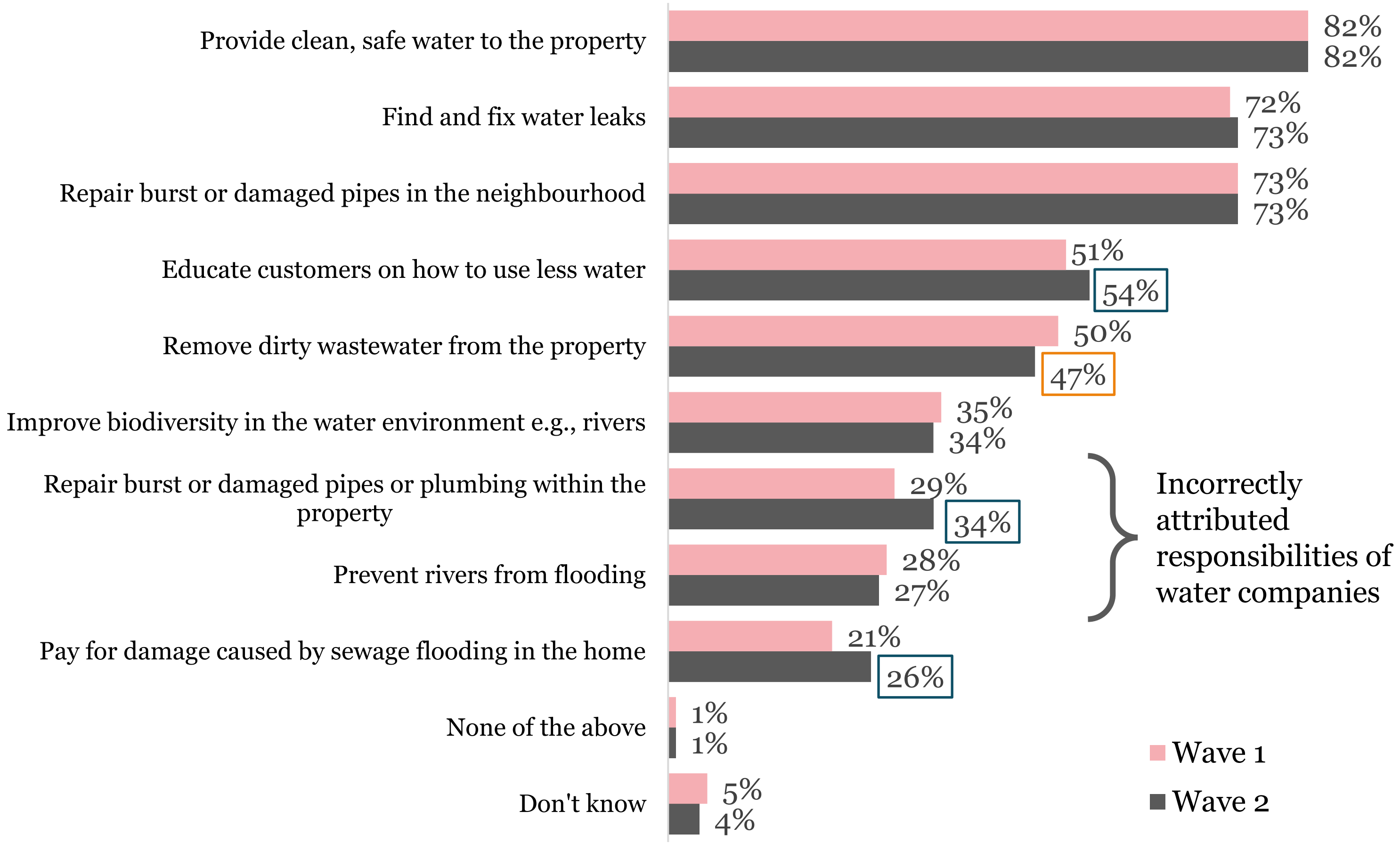
Water bill payers are more likely to **understand** how water companies operate.

This includes **changing water company**, with water bill payers more likely than non-bill payers to disagree that they can change water company (45% vs. 26%), whilst non-water bill payers are more likely to say they **don't know** (21% vs. 15%).

Q20. To what extent do you agree or disagree with the following statements. Base: All respondents (n=2,399) / Wave 1 (n=2,623)

Providing water, fixing leaks and repairing burst pipes continue to be seen as water companies' main responsibilities

Understanding of water companies' responsibilities

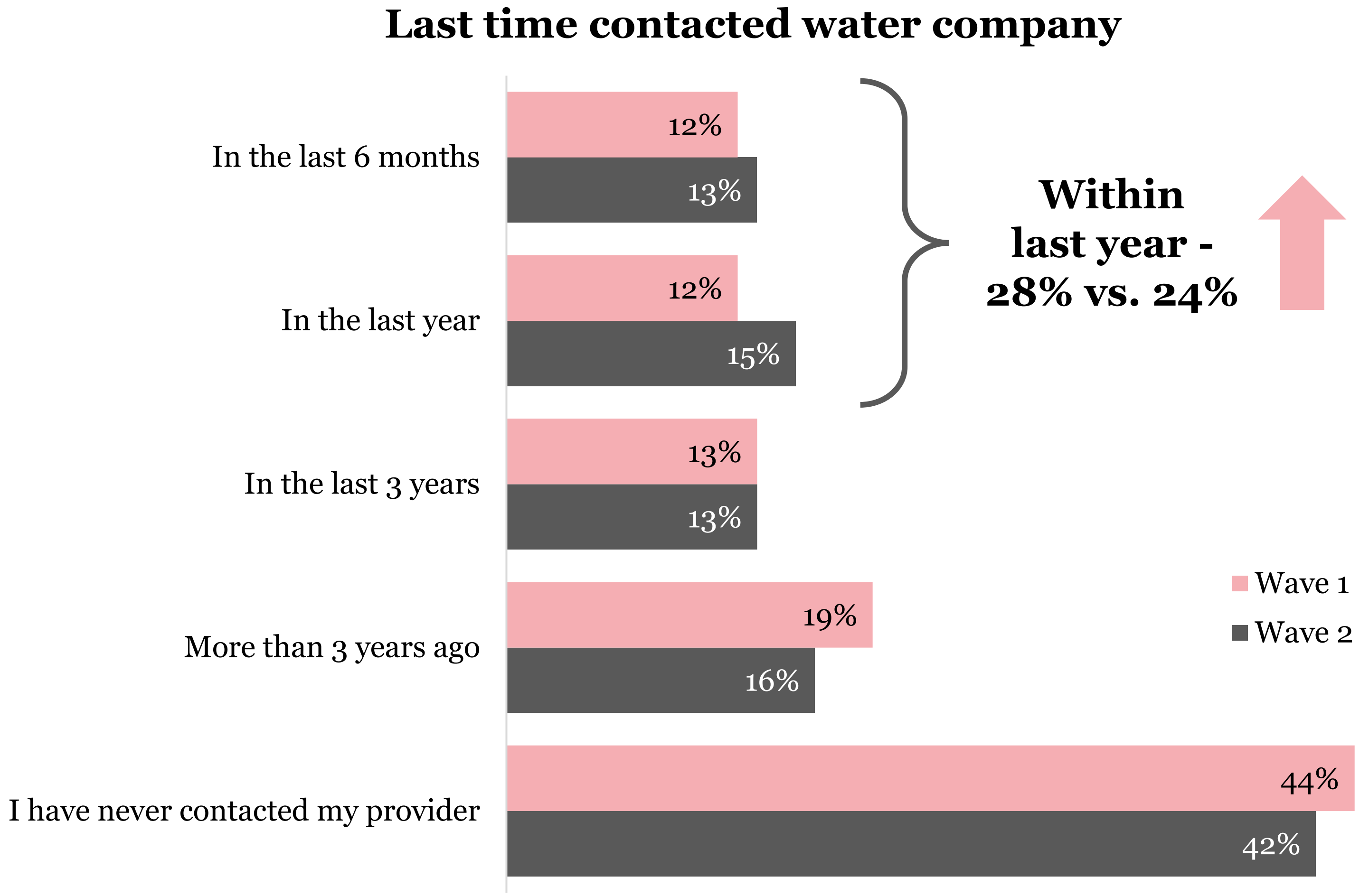


Respondents are more likely than Wave 1 to **correctly** say that water providers educate customers on how to use less water. However, they are less likely to say water providers remove dirty wastewater from the home.

Moreover, respondents are more likely to **incorrectly** say that water providers repair burst or damaged pipes or plumbing within the property.

Q21. Which of the following services do you think water companies provide? Base: All respondents (n=2,399) / Wave 1 (n=2,623)

More respondents are contacting their water company than in Wave 1, with those who are struggling financially driving this increase



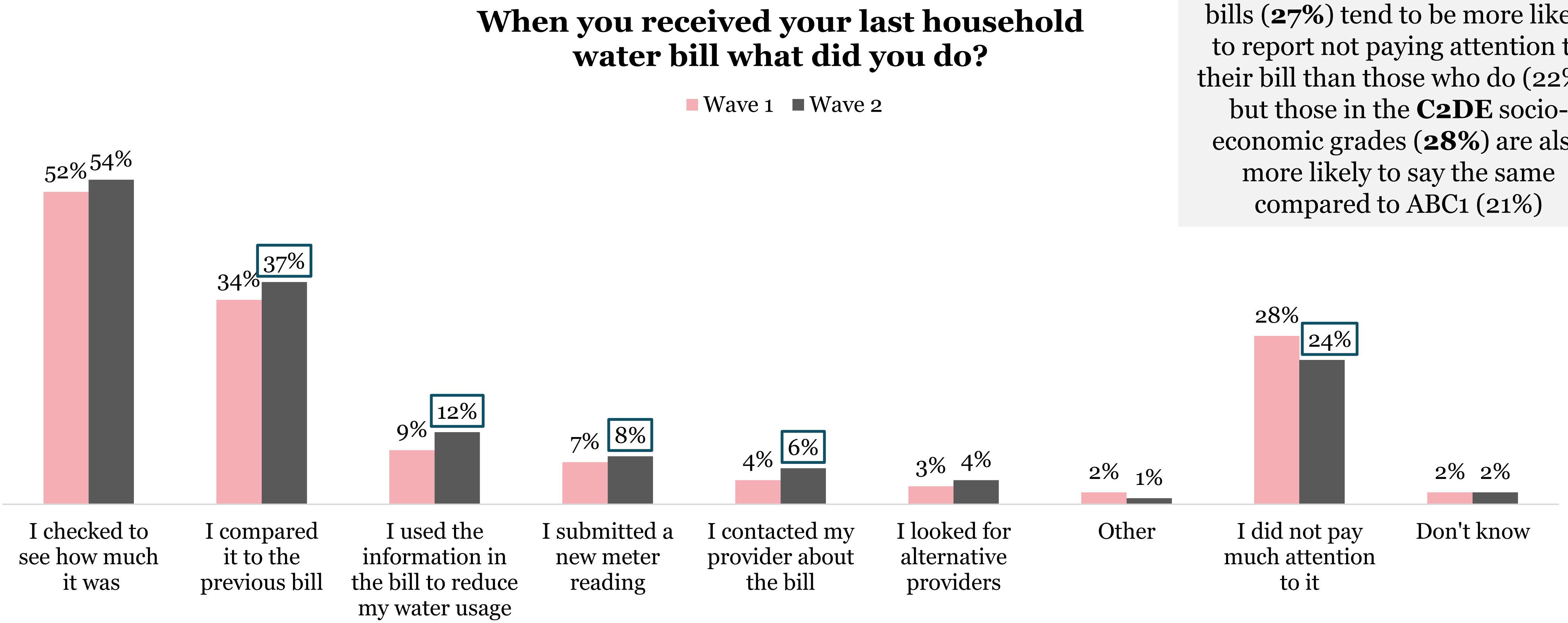
The increase in those contacting their water company is largely driven by those who have borrowed money to pay bills over the last 12 months (**39% vs. 32% in Wave 1**) and those who expect their financial situation to worsen in the next 12 months (**32% vs. 26% in Wave 1**)

Those with a water meter are also significantly more likely to have contacted their water provider (**34%**) compared to those without a water meter (**21%**)

Q27. When was the last time you contacted your water company, if at all? Base: All respondents (n=2,399) / Wave 1 (n=2,623)

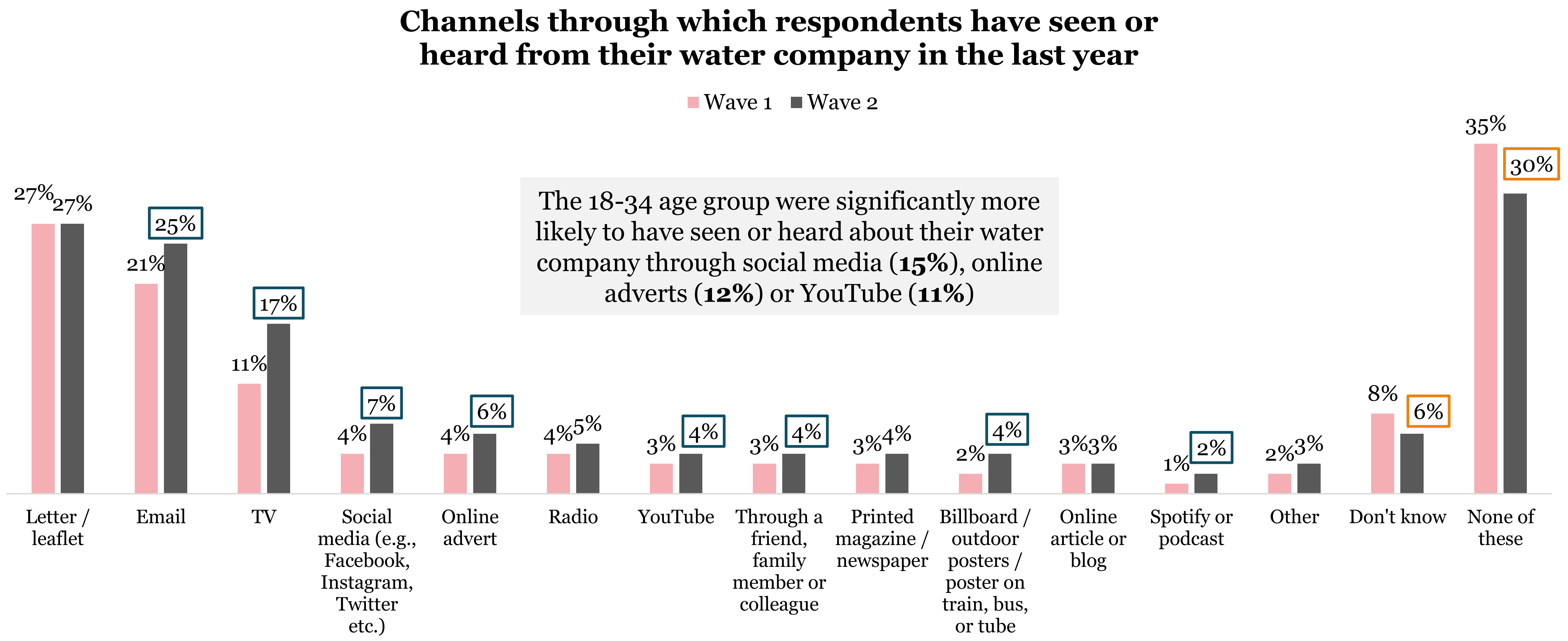
Water bill payers are paying more attention to their bills than in Wave 1, including checking and comparing it to previous bills, using it to reduce water usage, and contacting their provider

Those who **never struggle** to pay bills (**27%**) tend to be more likely to report not paying attention to their bill than those who do (22%), but those in the **C2DE** socio-economic grades (**28%**) are also more likely to say the same compared to ABC1 (21%)



Q25. When you received your last household water bill, which, if any, of the following did you do? Base: All water bill payers (n=1,945) / Wave 1 (n=2,086)

Respondents are more likely to remember seeing or hearing about their water company across several channels compared to Wave 1, including email, TV and social media



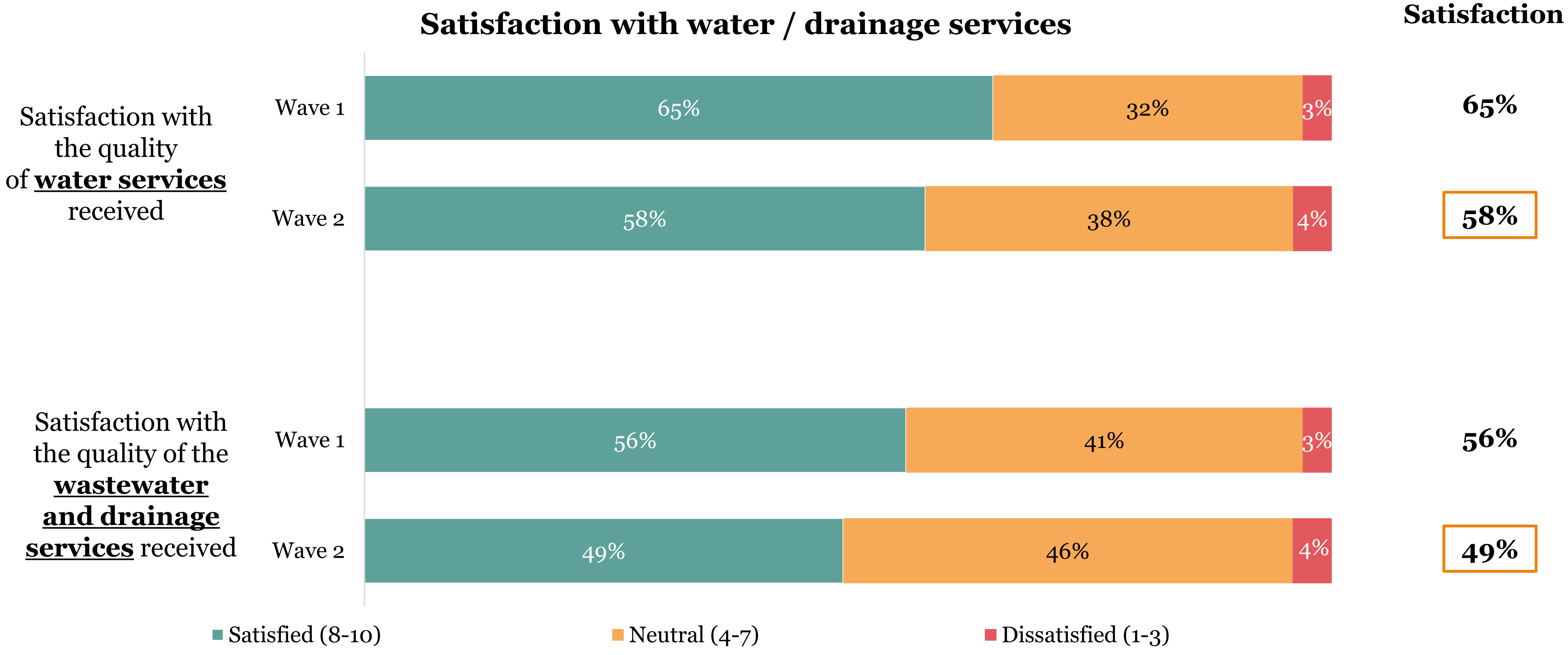
Q31. Through which of the following have you seen or heard from your water company in the last 12 months? Base: All respondents (n=2,399) / Wave 1 (n=2,623)

Understanding of the water industry and its services

- **Providing water, fixing leaks** and **repairing burst pipes** are most commonly attributed as water companies' responsibilities.
- Respondents are more likely than in Wave 1 to **correctly** say that water providers **educate customers** on how to use less water. However, they are also more likely to *incorrectly* say that water providers **repair** burst or damaged pipes or plumbing within the property.
- More respondents say they **contacted their water provider** than in Wave 1, with those who are **struggling financially** driving this increase.
- This is likely linked to increases in the **cost-of-living**, with water bill payers also now **paying more attention to their bills** than in Wave 1.
  - This includes **checking and comparing** their last bill to previous bills, using their bill to **reduce water usage**, and **contacting their provider** about their bill.
- Respondents are **more likely to recall hearing about** their water provider across several channels compared to Wave 1, including email, TV and social media.

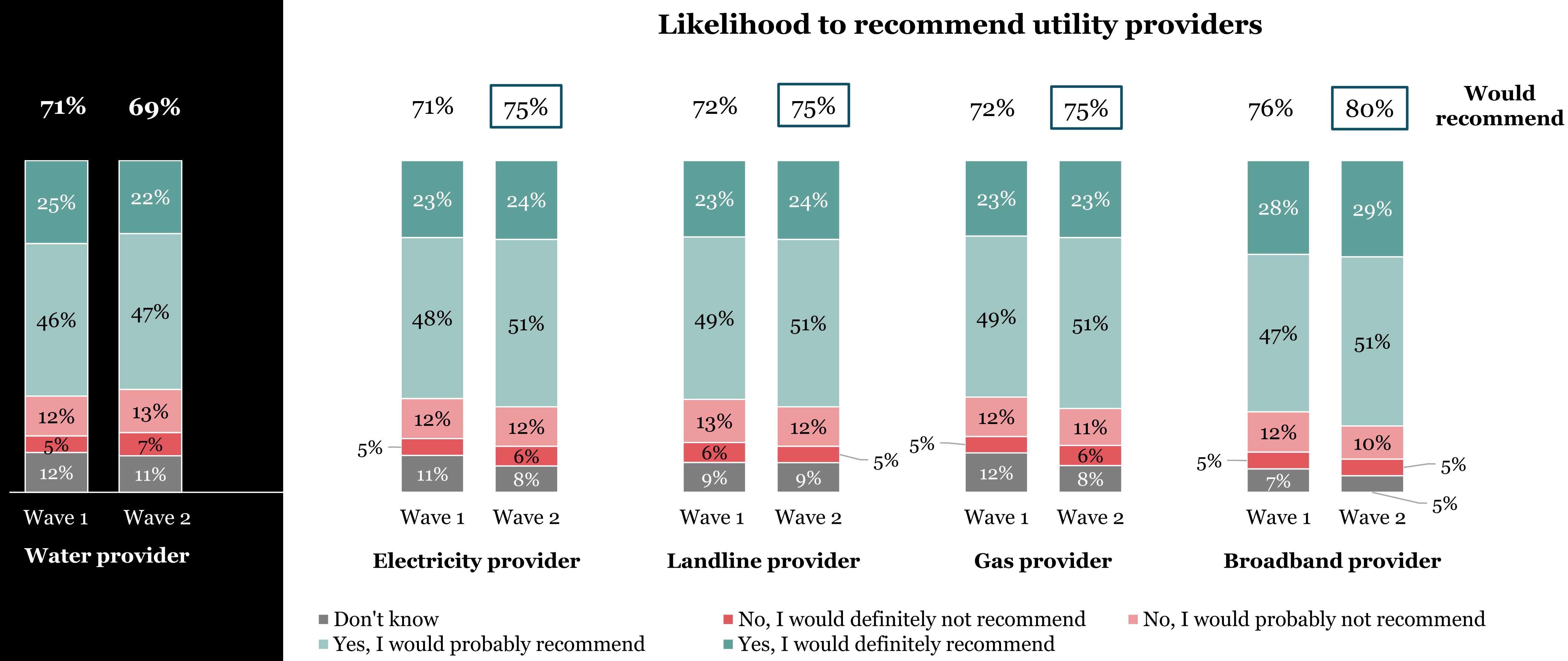
Satisfaction

Satisfaction with both water and wastewater / drainage services has decreased since Wave 1



 Q23. To what extent are you satisfied or dissatisfied with the following? Base: All respondents (n=2399) / Wave 1 (n=2,623)

Respondents are less likely to recommend their water provider to a family or friend than other utility providers, whose scores have all increased since Wave 1



Q24. Would you recommend your provider for the services they provide to a family member or friend? Base: All respondents excl. NA (n=1790-2361) / Wave 1 (n=2,186-2,565)

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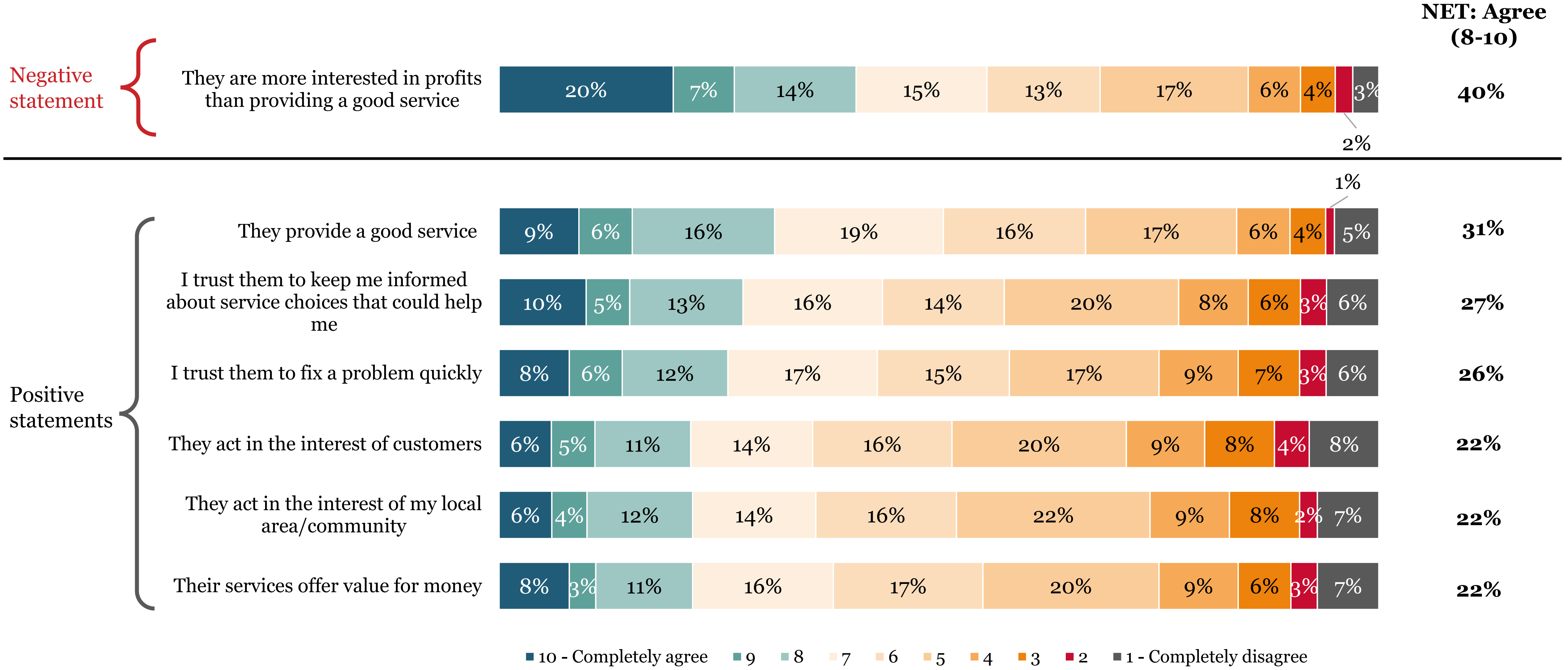
Satisfaction with water providers and the services they provide

- At an overall level, **satisfaction** with the quality of both **water** and **wastewater / drainage** services has **decreased** since Wave 1.

- Similarly, **bill payers** are **less likely** to recommend their **water provider** to a family or friend than other utility providers such as broadband, gas, landline and electricity.

Perceptions and trust

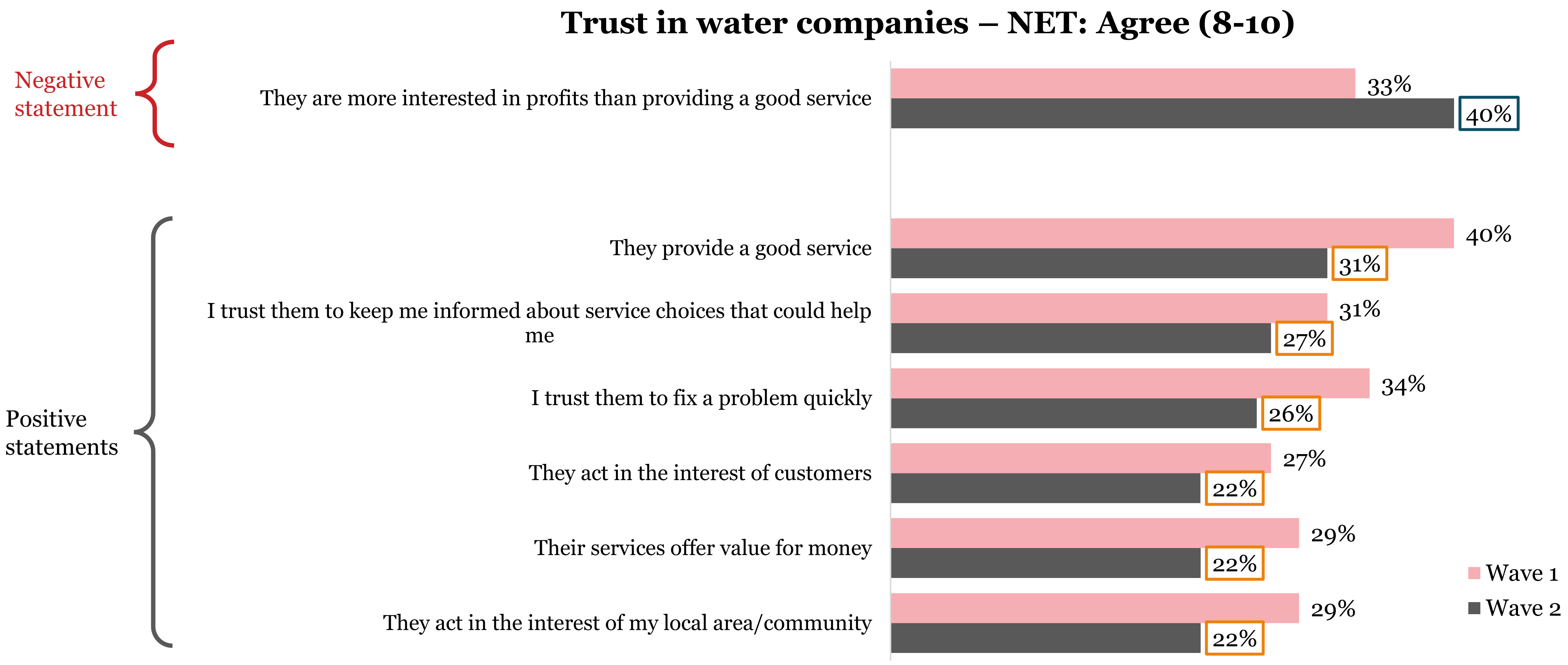
Respondents are more likely to agree that water companies are more interested in profits than providing a good service, helping keep them informed, or fixing problems quickly



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

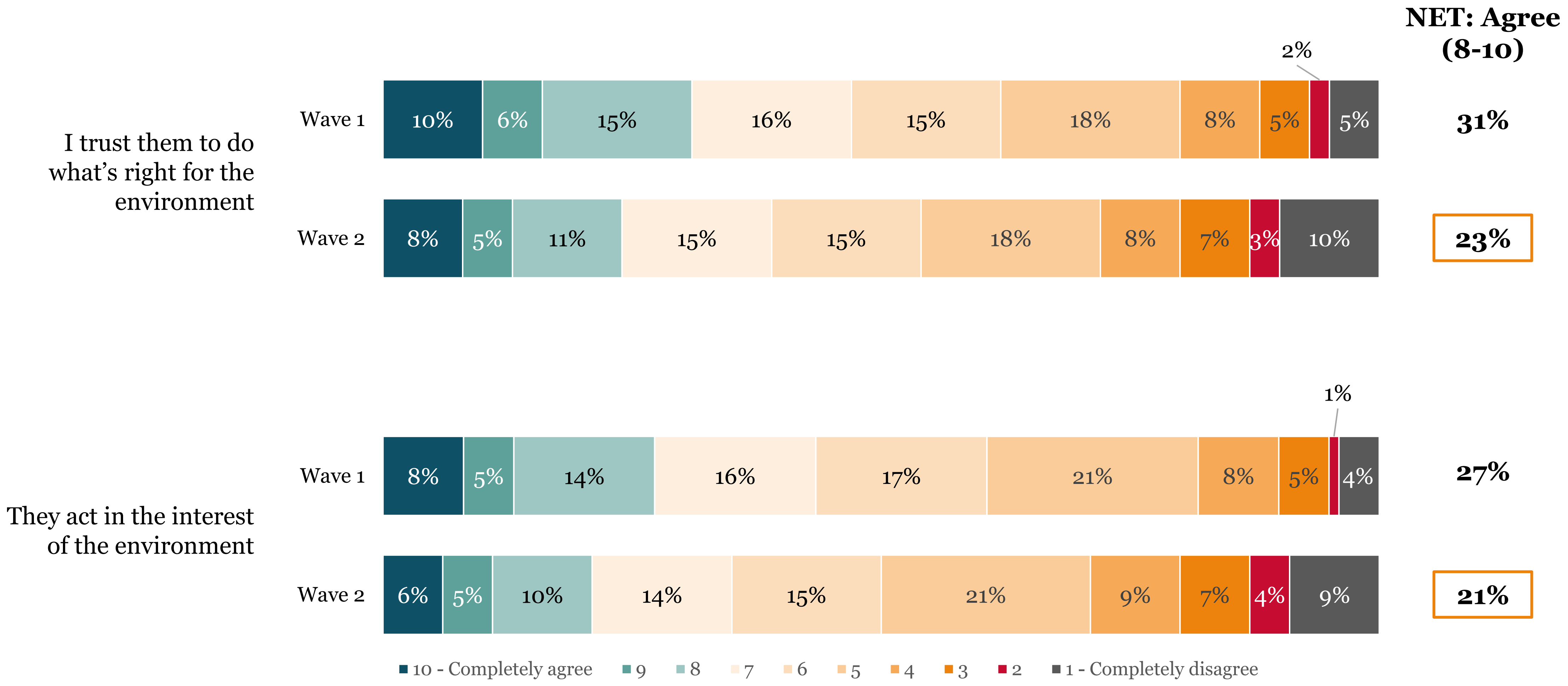
Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2399)

Perceptions of water companies have declined since Wave 1, with respondents significantly more likely to agree they are more interested in profits than providing a good service



Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2399) / Wave 1 (n=2,623)

Perceptions of water companies’ environmental credentials have also worsened since Wave 1, with less than a quarter now agreeing they trust them to do what’s right for the environment



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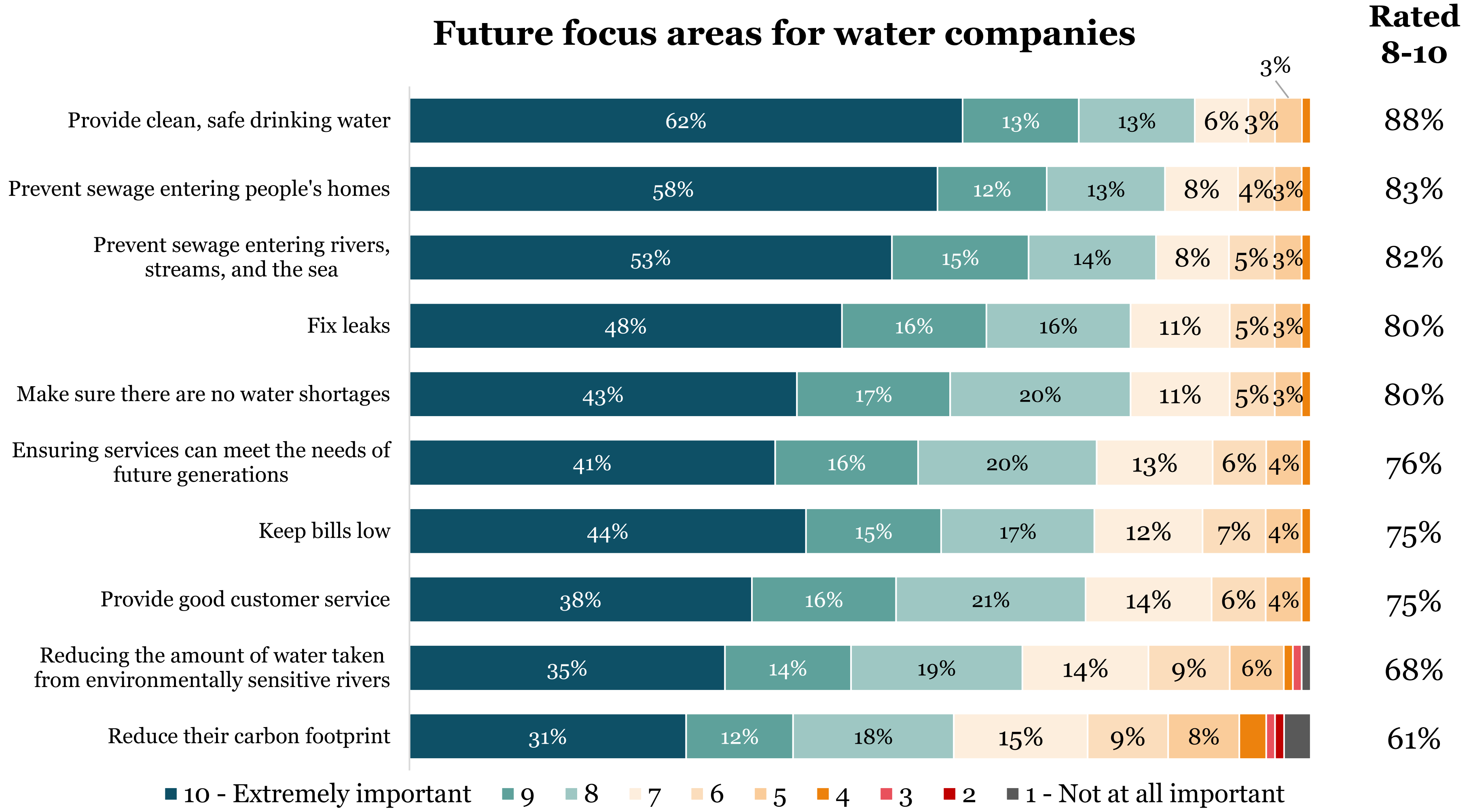
Q22. To what extent do you agree or disagree with the following statements about your water company or the services they provide on a scale from 1 to 10 where 1 is completely disagree and 10 is completely agree. Base: All respondents (n=2399) / Wave 1 (n=2,623)

Perceptions and trust

- **Perceptions** of water providers have **declined** since Wave 1, with respondents now more likely to agree that water companies are **more interested in profits** than providing a good service.
- This also includes a significant **decrease** in agreement that water companies provide a **good service in general**, trust that they will **keep customers informed** about service choices that could benefit them, and trust they will **fix a problem quickly**.
- Linked to earlier concerns around the rising **cost-of-living**, respondents are also ***less* likely** to agree that the services provided by water companies offer **value for money**.
- **Perceptions** of water companies’ **environmental credentials** have similarly declined since Wave 1.
    - Less than a quarter now agree that they trust companies to do what’s **right** for the **environment**, and just one in five agree that providers act in the **interests** of the environment.

Priorities

Providing clean, safe drinking water and preventing sewage entering homes and bodies of water are top priorities for future focus

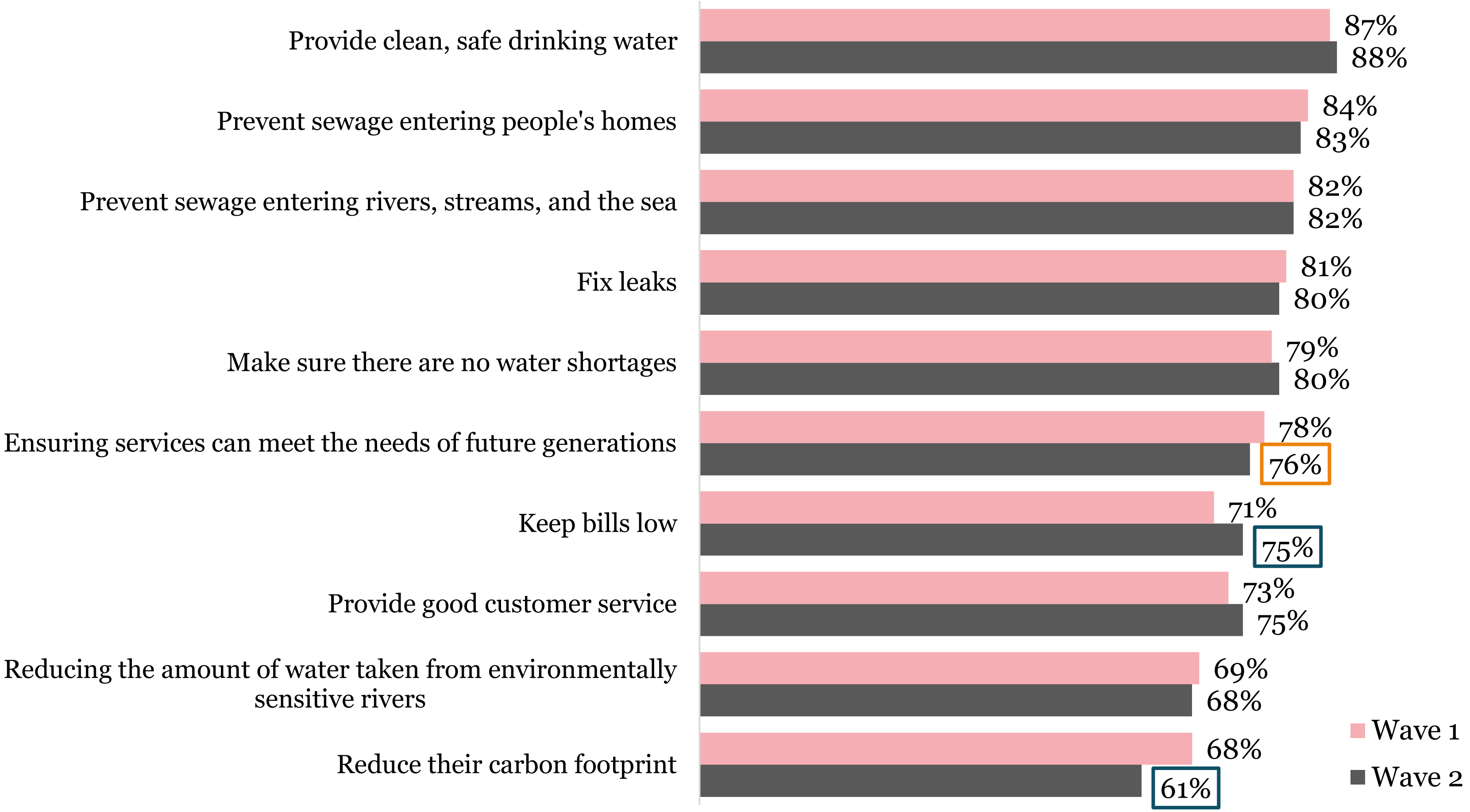


Top priorities continue to focus on **basic services** such as ensuring a clean water supply (88%), but also include waste issues such as **preventing sewage** entering both people's homes (83%) and bodies of water (82%).

Q36. Thinking about your water company and their focus over the next 10-20 years, please rate the following on a scale from 1 to 10 according to how important they are for you, with 10 being extremely important and 1 being not at all important. Base: All respondents (n=2399)

In the context of increases to the cost-of-living, reducing the cost of bills has taken priority over reducing carbon footprint and ensuring services meet the needs of future generations

Future priorities for water companies – NET: Important (8-10)



Almost three quarters (**75%**) think that water companies should focus on **keeping bills low**, up from seven in ten (**71%**) in Wave 1.

This focus on **reducing rising utility bills** has taken priority over **reducing carbon footprint**, with just six in ten (**61%**) agreeing that water companies should reduce their carbon footprint compared to almost seven in ten (**68%**) in Wave 1.

Q36. Thinking about your water company and their focus over the next 10-20 years, please rate the following on a scale from 1 to 10 according to how important they are for you, with 10 being extremely important and 1 being not at all important. Base: All respondents (n=2399) / / Wave 1 (n=2,623)

Priorities for water companies to focus on in the future

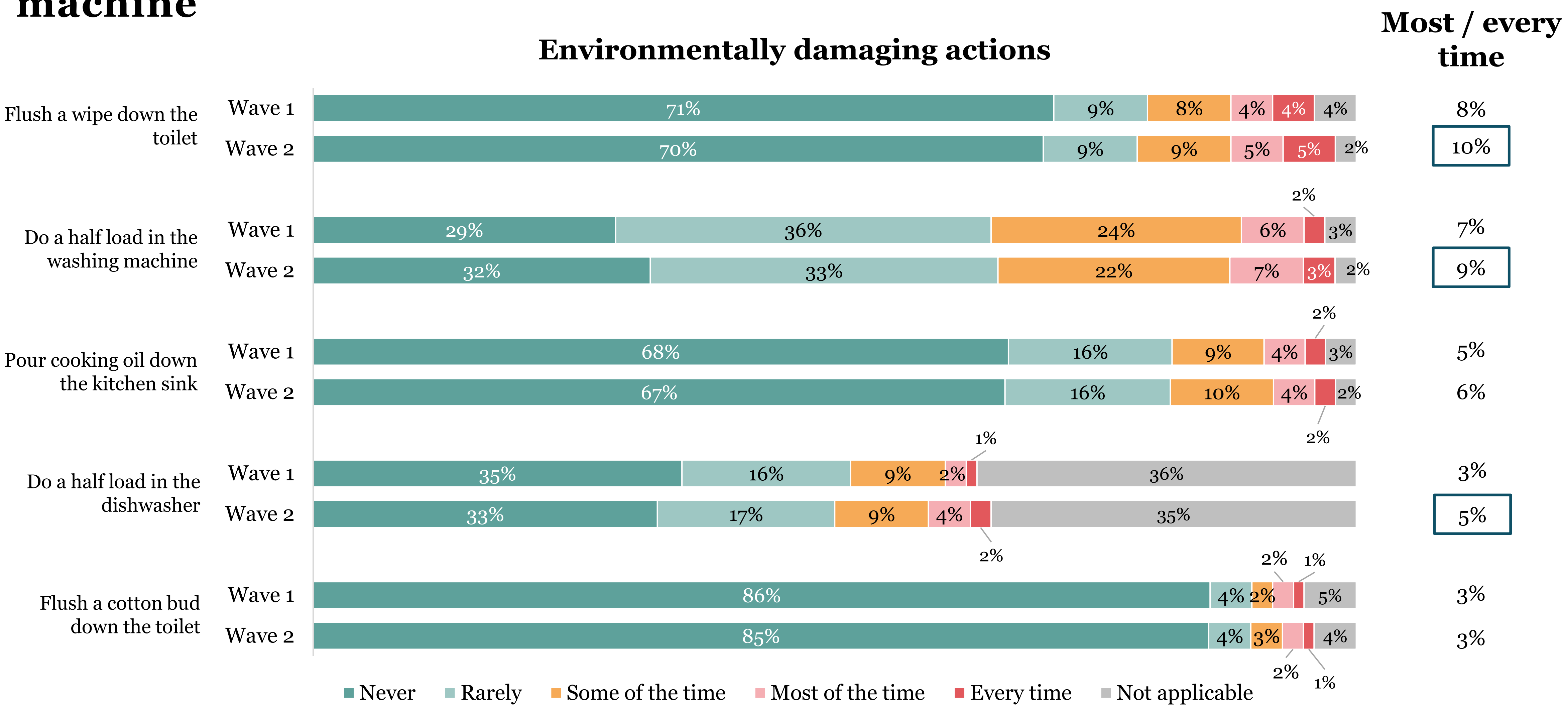
- **Basic services** like providing **clean, safe drinking water** and **preventing sewage** entering homes and bodies of water are the top priorities among respondents.

- In light of the increasing **cost-of-living**, more respondents are looking for water providers to focus on **keeping bills low** than in Wave 1.

- Meanwhile, the importance of **reducing carbon footprint** has **declined** since Wave 1, with fewer respondents saying water companies should prioritise reducing their carbon footprint.

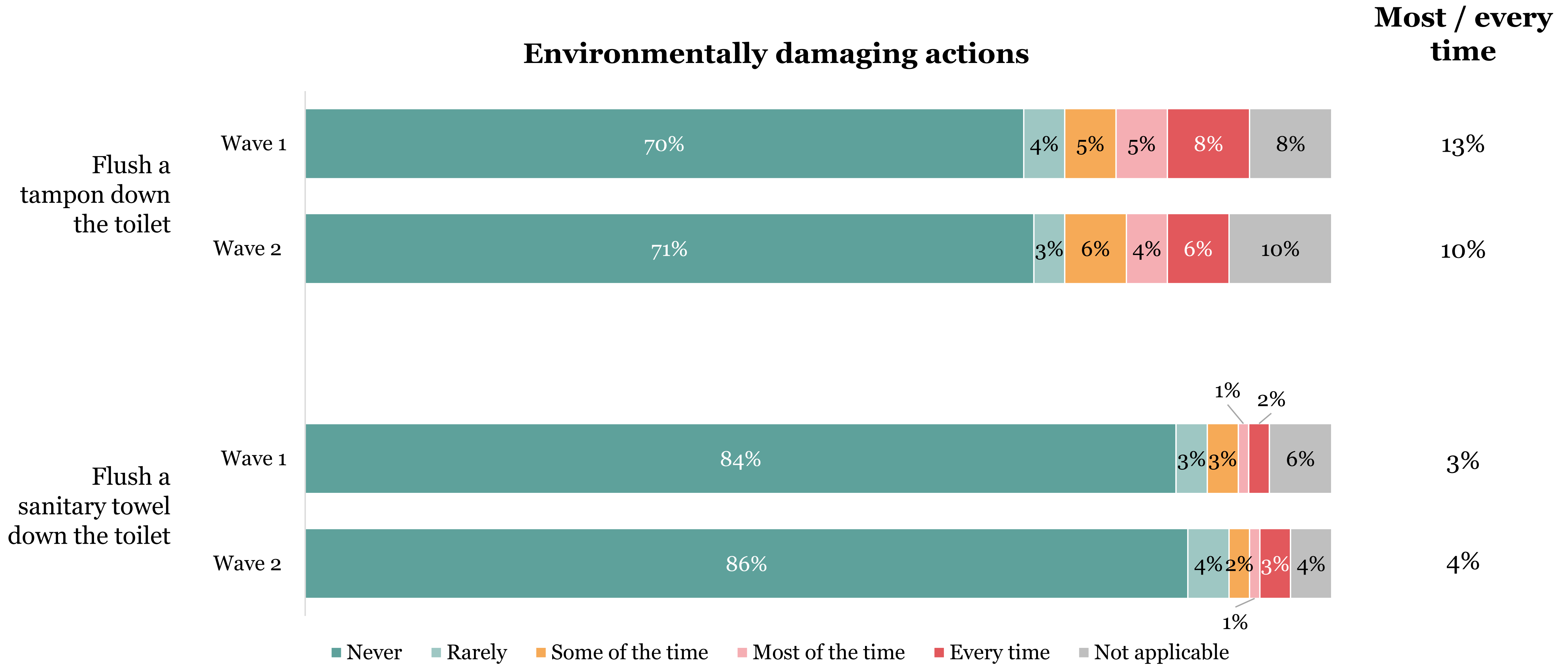
Environmental behaviours

Respondents are slightly more likely than Wave 1 to say they flush wipes down the toilet and do half loads in the dishwasher/washing machine



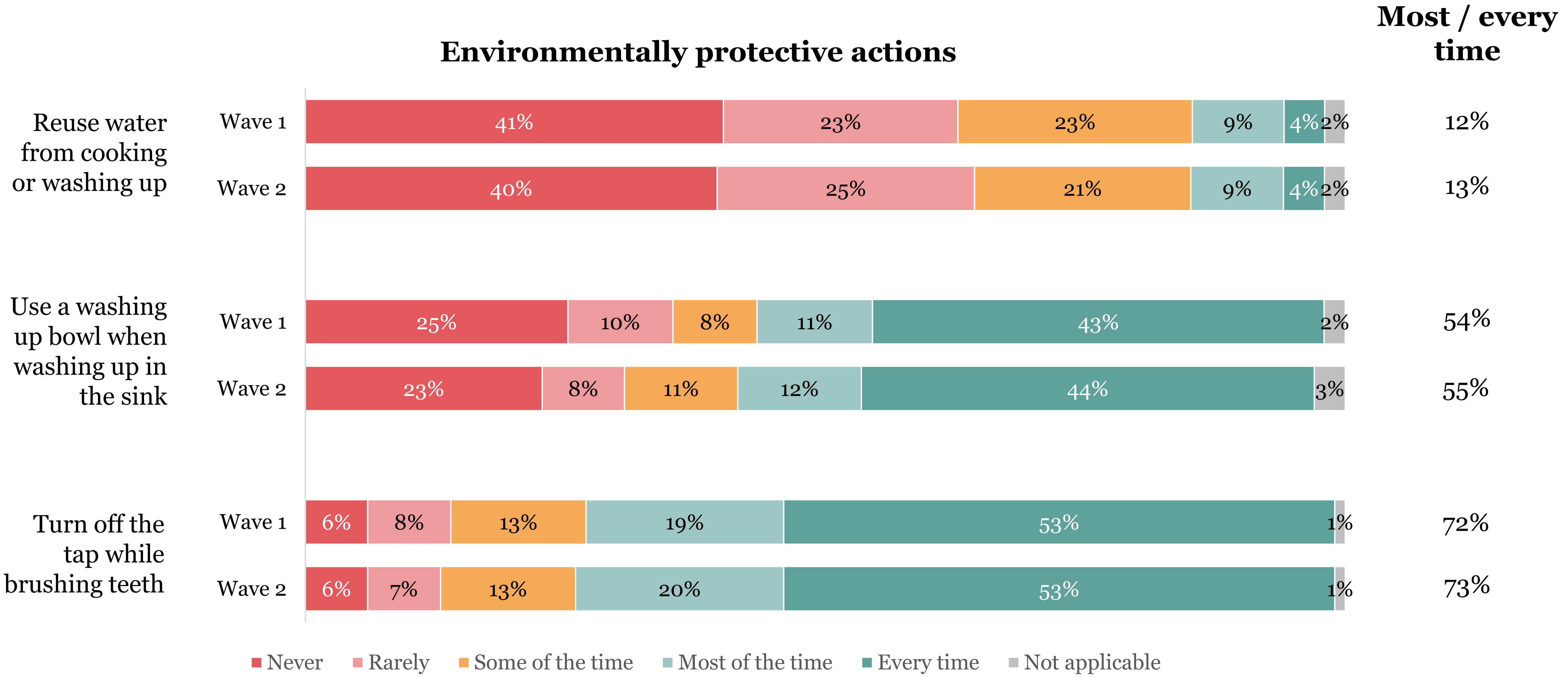
 Q11. How often, if at all, do you yourself do the following in your home? Base: All respondents (n=2,399) / Wave 1 (n=2,623)

One in ten women under 55 say they frequently flush tampons down the toilet



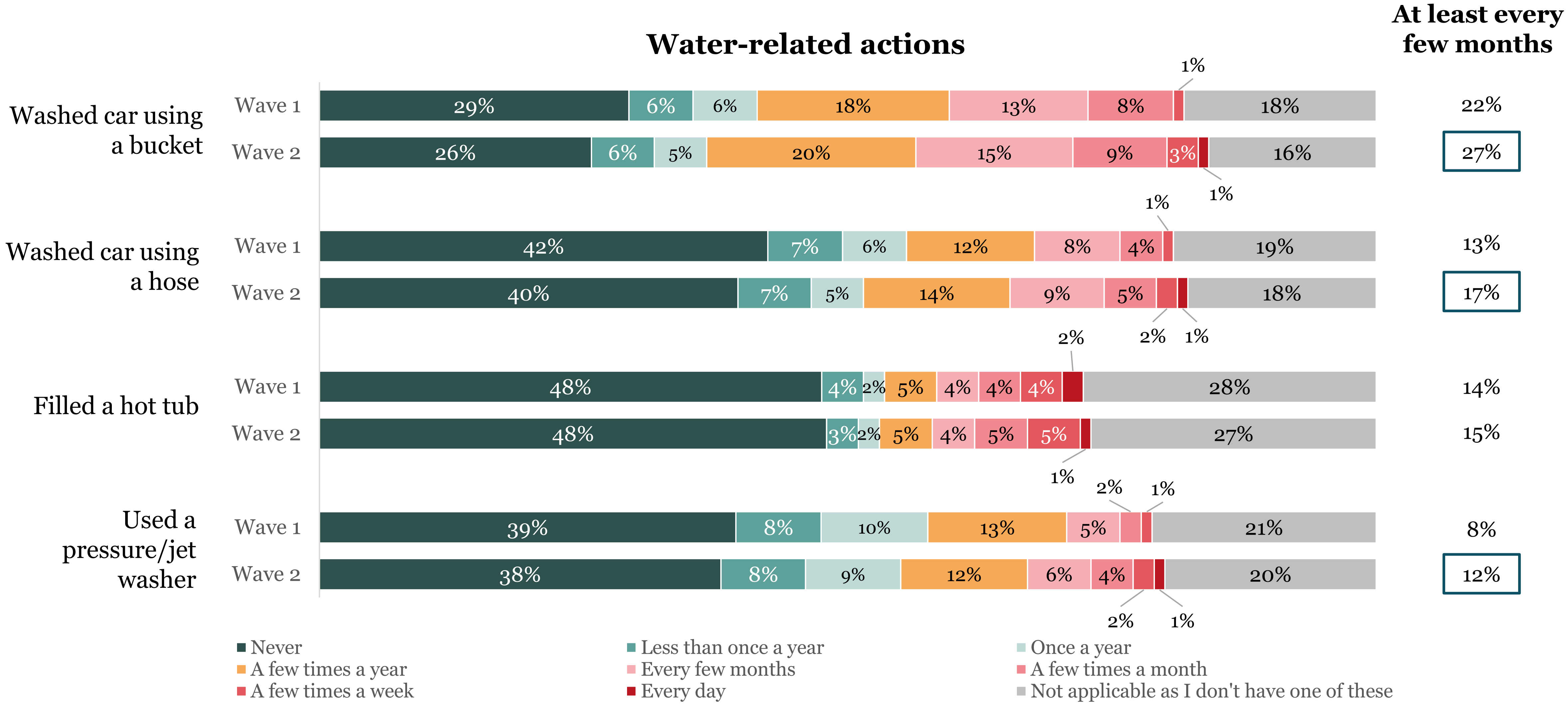
Q11. How often, if at all, do you yourself do the following in your home? Base for statements relating to sanitary towels and tampons: All female respondents aged under 55 (n=847) / Wave 1 (n=875)

Three quarters of respondents claim to turn the tap off while brushing their teeth most or every time, but only one in ten reuse water from cooking or washing up



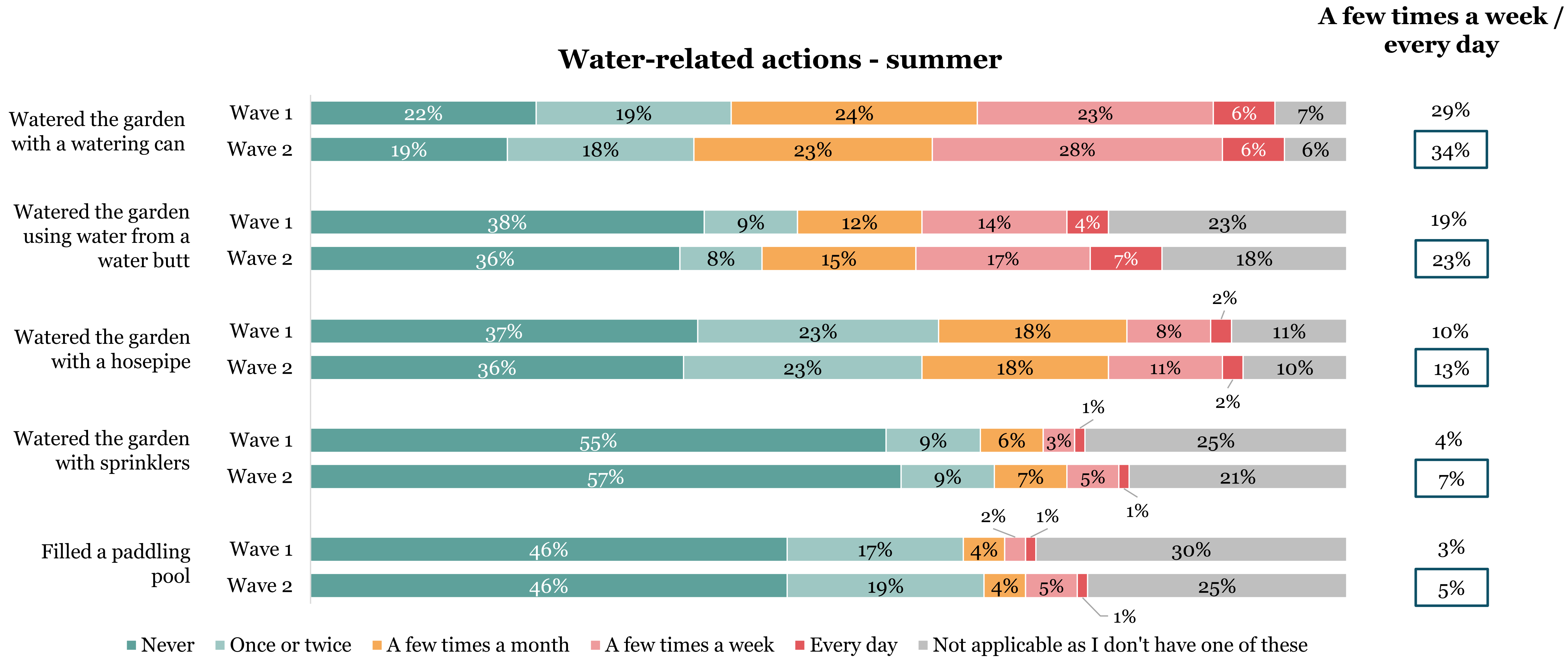
Q11. How often, if at all, do you yourself do the following in your home? Base: All respondents (n=2,399) /Wave 1 (n=2,623)

More respondents report washing their car using a bucket/hose and using pressure/jet washers than in Wave 1



Q12. How often, if at all, have you yourself done the following in or around your home, over the last 12 months? Base of other statements: All respondents (n=2,399) / Wave 1 (n=2,623)

More respondents report watering the garden with a watering can, water butt, hosepipe or sprinklers in the summer months than in Wave 1



Q12b. How often, if at all, do you yourself do the following in or around your garden during the summer months? Base: All respondents with a garden (n=2,072) / Wave 1 (n=2,293)

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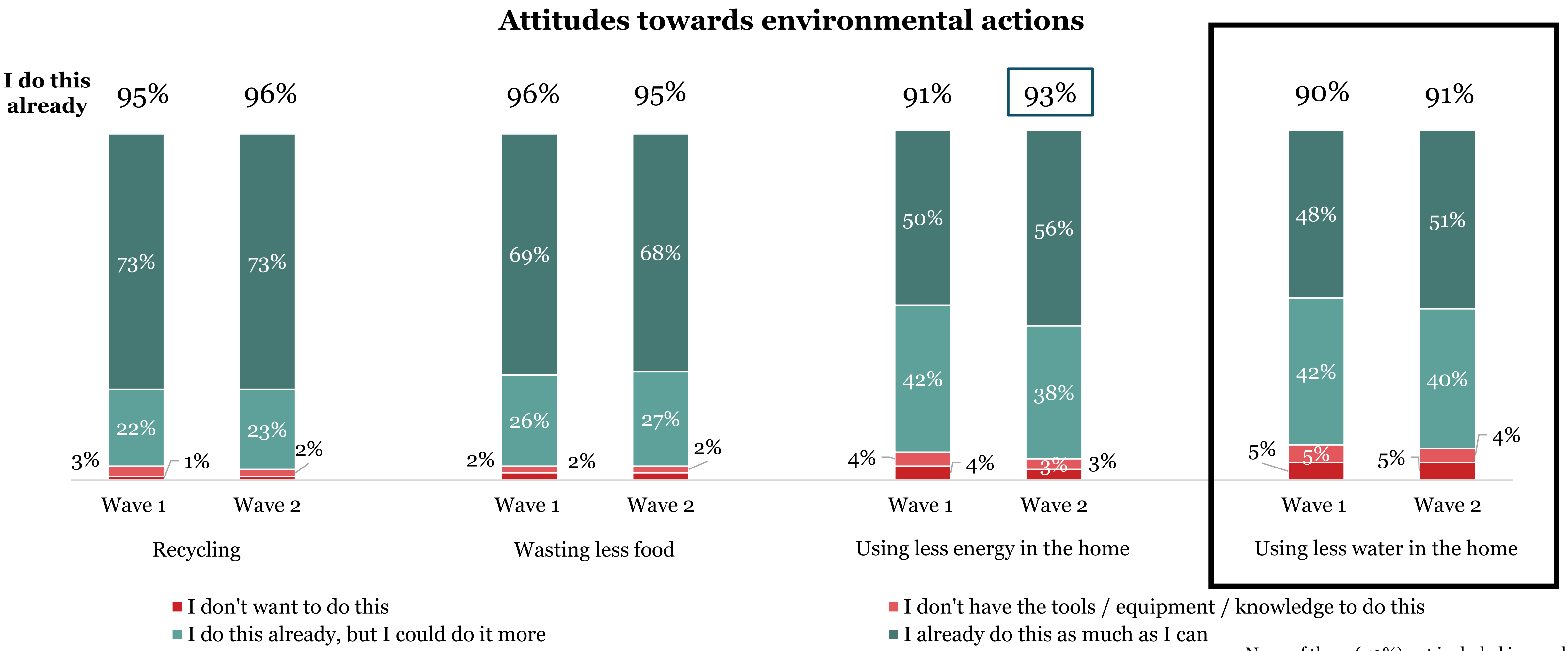
Around half of respondents say they are already using as little water as they can in the home, while two in five say they could do more



None of these (<2%) not included in graph.

Q18. Please select the response that most reflects your view for the following statements. Base: All respondents (n=2,399) / Wave 1 (n=2,623)

How respondents think about and use water / undertake behaviours that impact the water environment

- Respondents are slightly more likely than in Wave 1 to say they do **environmentally damaging actions** such as **flush wipes** down the toilet. They are also more likely to report **doing half loads** in the dishwasher/washing machine.

- Similarly, more respondents report washing their car using a **bucket/hose** and using **pressure/jet washers** than in Wave 1.

- More respondents report **watering the garden** with a watering can, water butt, hosepipe or sprinklers during the **summer months** than in Wave 1.

- Around half of respondents say they are already using **as little water as they can** in the home, though two in five say they could focus on **this more**.

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