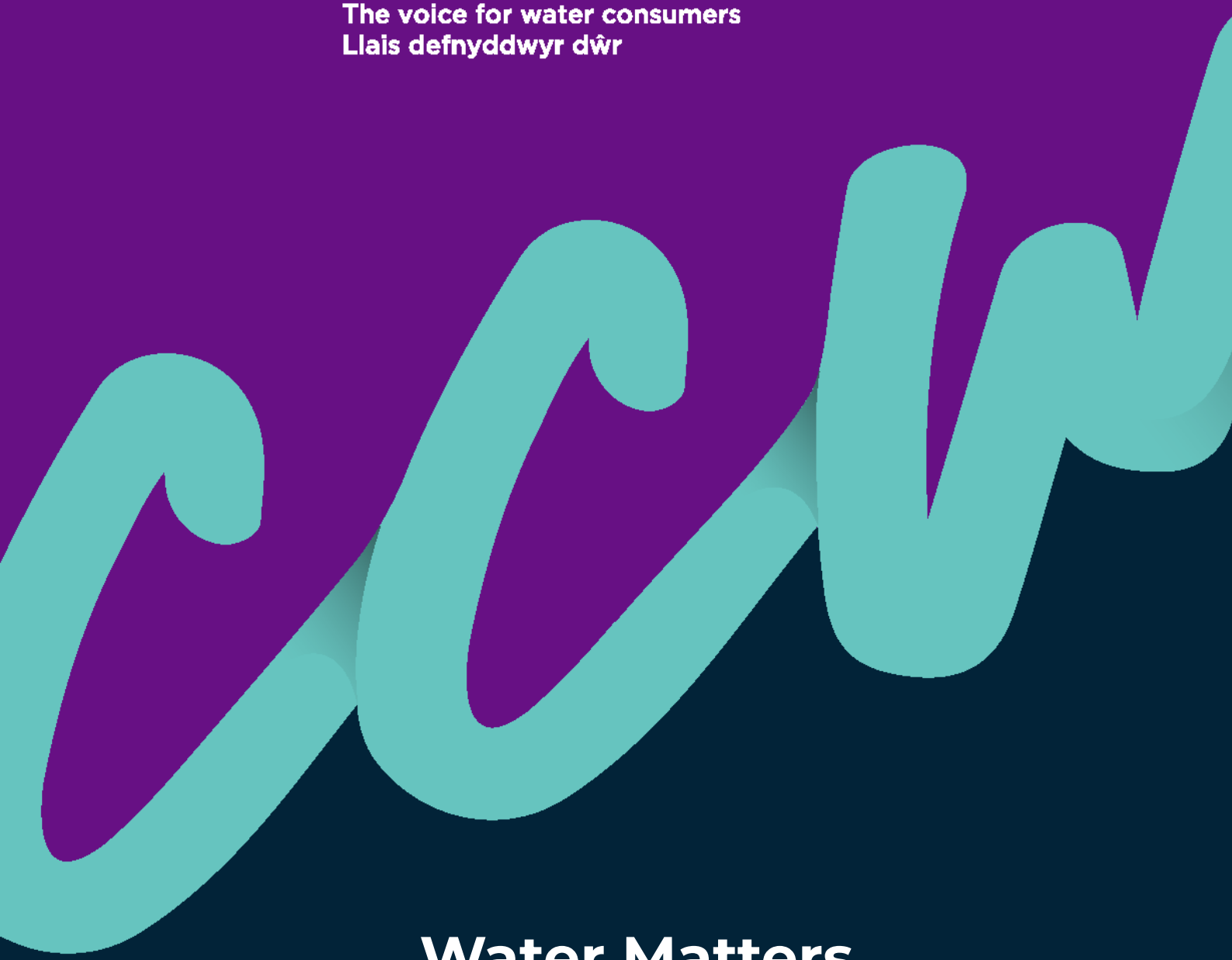




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The voice for water consumers
Llais defnyddwyr dŵr



Water Matters May 2024

HOUSEHOLD CUSTOMERS' VIEWS ON THEIR WATER AND
SEWERAGE SERVICES

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Executive Summary

Since 2011, the Water Matters survey in its current format 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 – although we have been asking customers for their views on some of these issues since 2006.

Overview of methodology:

- This year's survey consisted of 4,952 telephone interviews with household water bill payers.
- Fieldwork was undertaken between 26th June 2023 and 25th January 2024. For this reason, although published in 2024, the data below refers to 2023.
- A minimum of 200 interviews were carried out with each Water & Sewerage Company (WaSC) and 150 with each Water only Company (WoC)¹.
- All companies were given the opportunity to boost their sample. In 2023, 5 WaSCs and 1 WoC opted for this, and their sample size is larger as a result².

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 8 companies that supply just water; and by each water company³. This includes ten-year trend analysis⁴ to determine the direction of travel – upward trend, flat or downward trend – for each measure.

¹ Affinity Water were assigned 250 interviews.

² 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.

³ The views of customers of specific water companies are in the data report which follows.

⁴ Trends are analysed over the last ten years from 2014. Some shorter trends exist (5 years, 7 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.

Key Findings

Satisfaction with water and sewerage services

In 2023, 89% of customers in England and Wales were satisfied with their water supply; satisfaction has shown a downward trend over the past ten years (Figure 1).

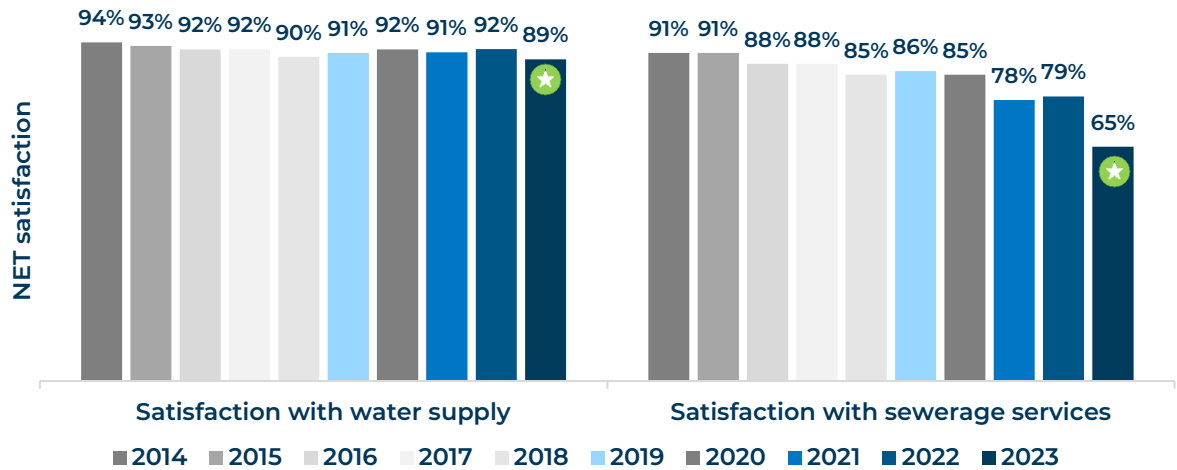
- Overall satisfaction with water supply was significantly higher in Wales compared to England in 2022 (92% vs. 89% for water respectively).
- Satisfaction levels for different aspects of water supply service ranged from 94%-84%, apart from 'hardness/softness' of water which was significantly lower (60% satisfied in 2023). Satisfaction with most aspects of water supply has decreased significantly since 2022: colour and appearance of tap water, safety of drinking water, water pressure, taste and smell of tap water and hardness/softness and water pressure. Satisfaction with reliability of water supply has also decreased (by 1% - not significant) and remains the highest rated aspect.

Satisfaction with individual sewerage elements continues to perform worse than satisfaction with water services

- In 2023, 65% of customers in England and Wales were satisfied with their sewerage services, significantly lower than in 2022.
- Satisfaction with different elements of sewerage services ranged from 59%-35% (maintaining sewers and drains, reducing smells, minimising sewer flooding and cleaning wastewater). There has been a significant decrease in satisfaction with all attributes in 2023.
 - Reducing smells from sewage treatment works (down to 59% from 73%)
 - Maintenance of sewerage pipes and treatment works (down to 59% from 74%)
 - Cleaning waste water properly before releasing it back into the environment (down to 35% from 53%)
 - Minimising sewer flooding (down to 43% from 61%)
- Customers were more satisfied with their energy services (gas and electricity) and their water service, than they were with their sewerage service.

Figure 1. Overall satisfaction with water and sewerage services⁵

10-year rolling avg. 2014 – 2023	91.6%	83.4%
Change since last year	-3%	-14%
10-year trend	↓	↓



* Significant difference between 2022-2023 for satisfaction with Water supply and Sewerage services

Care and trust

Only half of customers believe that water companies care about the services they provide.

- 50% of customers across England and Wales agreed that their water company cares about the services they provide, significantly lower than in 2022 (64%). The overall ten-year trend for England and Wales is downward (Figure 2).
- Customers in Wales were significantly more likely (60%) than those in England (50%) to agree that their company cares and the 10 year trend is a static one for customers in Wales (downward for customers in England).

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

- 2023 saw a significant decrease for Trust in water from 7.21⁶ in 2022 to 6.37 (Figure 2), the lowest score since monitoring began.
- Trust shows a downward trend in England over time for the first time since monitoring began and the significant drops have impacted the trend for Wales as well – previously upward, the trend is now static.

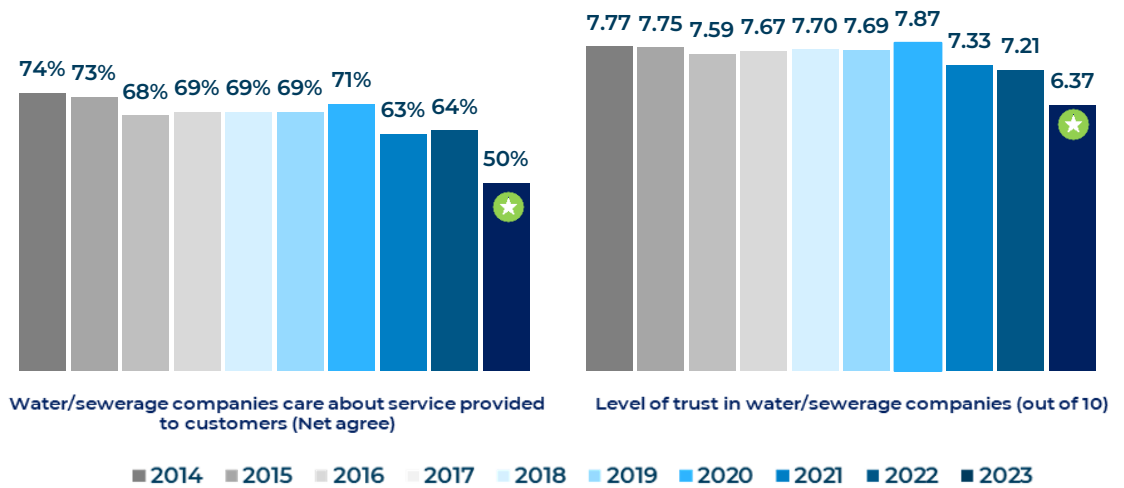
⁵ The rolling ten-year averages are calculated based on the total valid base of weighted data at each time point. The ten-year trends are assessed using the Mann-Kendall method (Mann 1945, Kendall 1975). The Mann-Kendall analysis is applied to exponentially smoothed, transformed data rather than the raw data.

⁶ 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.

- Trust was significantly higher in Wales than in England (6.93 vs. 6.34 respectively).
- Water companies were less trusted than energy companies (6.37 vs. 6.52 respectively).

Figure 2: Care and trust in water/sewerage companies

10-year rolling avg. 2014 – 2023	66.9%	7.49
Change since last year	-14%	-0.84
10-year trend	↓	↓



★ Significant difference between 2022-2023 for Care and Trust

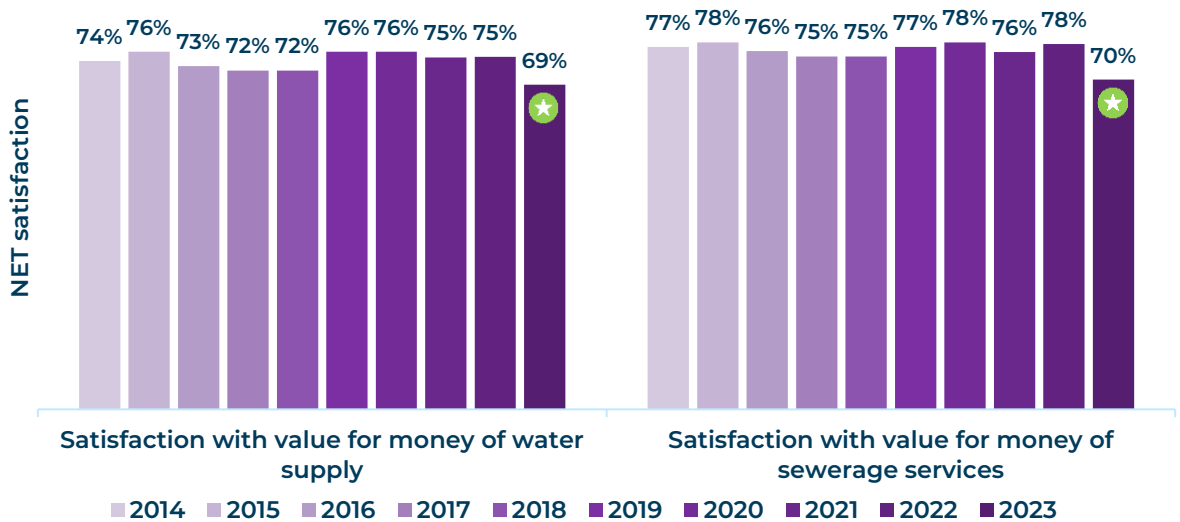
Value for money

Satisfaction with value for money of water and sewerage services has decreased significantly.

- 69% of customers in England and Wales were satisfied with the value for money of their water services, decreasing significantly since 2022 (75%). The ten-year trend is static (Figure 3).
- 70% of customers in England and Wales were satisfied with the value for money of their sewerage services and this decreased significantly since 2022 (78%). The ten-year trend is static (Figure 3).

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

10-year rolling avg. 2014 – 2023	73.7%	75.8%
Change since last year	-6%	-8%
10-year trend	↔	↔



★ Significant difference between 2022-2023 for satisfaction with value for money of water supply and sewerage services

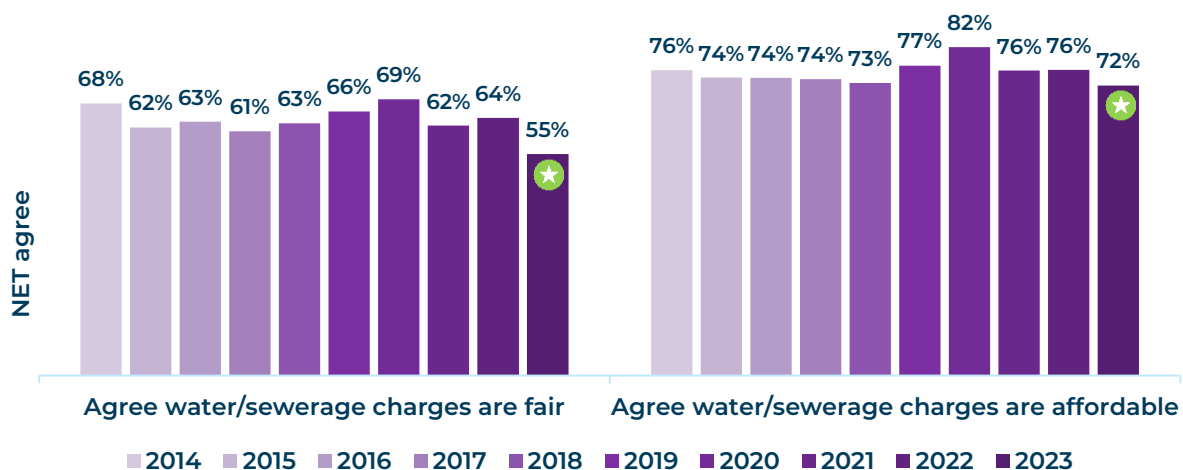
Fairness and affordability of charges

Perceptions of fairness and affordability of charges for water/sewerage have decreased significantly since 2022.

- In 2023, 55% of customers in England and Wales agreed that the charges they pay are fair, a significant decrease since 2022 (64%).
- More customers agreed that their charges are affordable than fair, 72% in England and Wales in 2023 (Figure 4). However, the proportion of customers agreeing that their charges are affordable has decreased significantly since last year (76%).

Figure 4: Fairness and affordability of water/sewerage charges

10-year rolling avg. 2014 – 2023	63.4%	75.7%
Change since last year	-9%	-4%
10-year trend	↔	↔



★ Significant difference between 2022-2023 for agreement that water and/or sewerage charges are fair and affordable

Change in financial situation over the last year

Just under half of customers say their financial situation had got worse since last year.

- In 2023, 48% say their household finances have got worse over the last year, a significant decrease from 2022 (53%). Two-fifths said they had remained unchanged (42%) and the remaining 10% said they had got better (a significant increase since 2022 – 7%).
- A similar proportion of customers in Wales said their financial situation had got worse over the last year compared with England (47% in Wales compared with 48% in England).

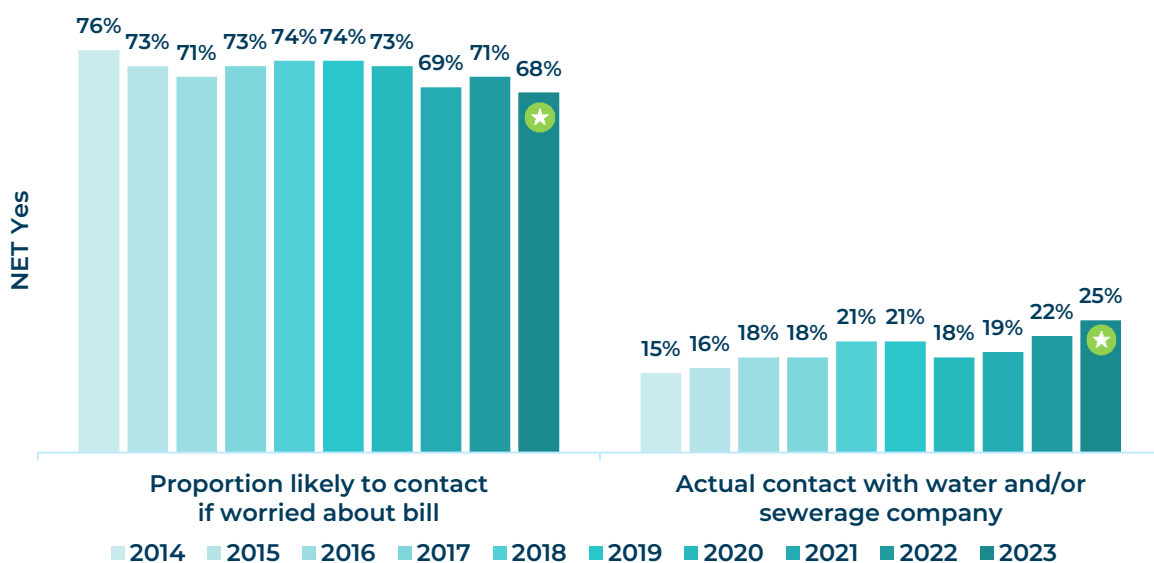
Contact with water companies

The ten-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.

- Slightly over two-thirds of customers (68%) 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 76% in 2014.
- Despite this, actual contact is increasing. One quarter of customers (25%) in England and Wales contacted their water/sewerage company in 2023, a significant increase since 2022 (22%). The main reason for contact was a billing enquiry.
- In 2023, 74% of customers in England and Wales who contacted their water/sewerage company in the last year were satisfied with how it went overall. Satisfaction with specific aspects of contact handling ranges from 79% to 67% (including ease of contact, quality of information, knowledge/ professionalism, resolution and kept informed), scores for attributes were lower than 2022 and, although these are not significant drops, the overall trend for all attributes is downward

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

10-year rolling avg. 2014 – 2023	72.0%	19.4%
Change since last year	-3%	+3%
10-year trend	↓	↑



★ Significant difference between 2022-2023 for likelihood to contact and actual contact with water and/or sewerage company

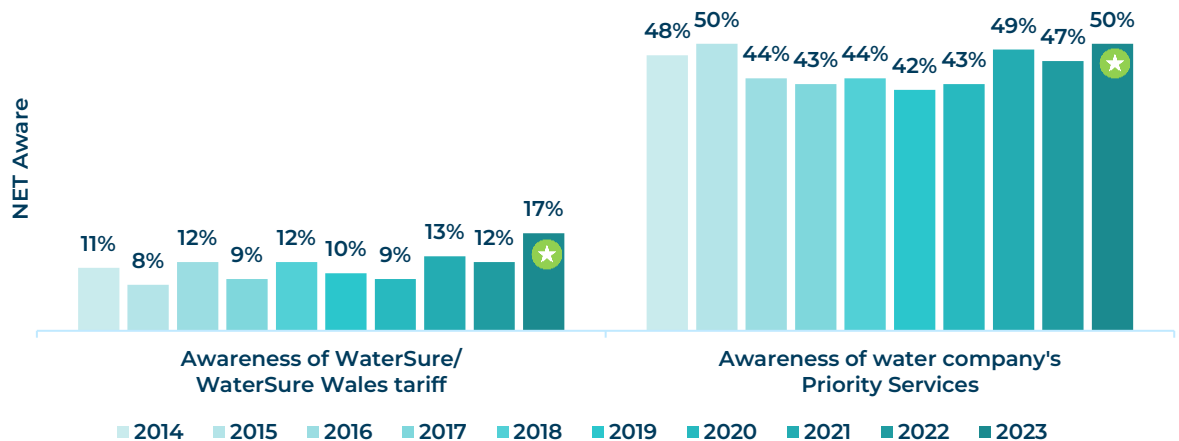
Awareness of WaterSure support tariff⁷ and Priority Services

Awareness of WaterSure/WaterSure Wales has decreased this year, but the overall trend remains upward, and the ten-year trend is flat for awareness of Priority Services.

- Awareness of the WaterSure tariff has increased significantly to 17% in England and Wales, from 12% in 2022 and the ten year trend is flat.
- 50% of customers in England and Wales were aware of Priority Services. This has increased significantly since 2022 (47%), and the ten year trend is a flat one.
- 45% were aware that their water company offers reduced bills to some households, whose sometimes struggle to pay their bills because of their financial circumstances, a significant increase since 2022 (37%).

Figure 6: Awareness of WaterSure and Priority Services

10-year rolling avg. 2014 – 2023	11.0%	46.1%
Change since last year	+5%	+3%
10-year trend	↔	↔



★ Significant difference between 2022-2023 for awareness of WaterSure and Priority Services

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, fewer than half said they are good.

- Across England and Wales, 47% of customers said that the communications from their companies are good, significantly lower than in 2022 (51%). 23% of these said the main reason for having this view is that they're informed of disruptions/interruptions.

⁷ 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.

- On the other hand, 23% of customers said that the communications are poor and 33% of these say this is because they don't recall any communication/ correspondence apart from their bill.

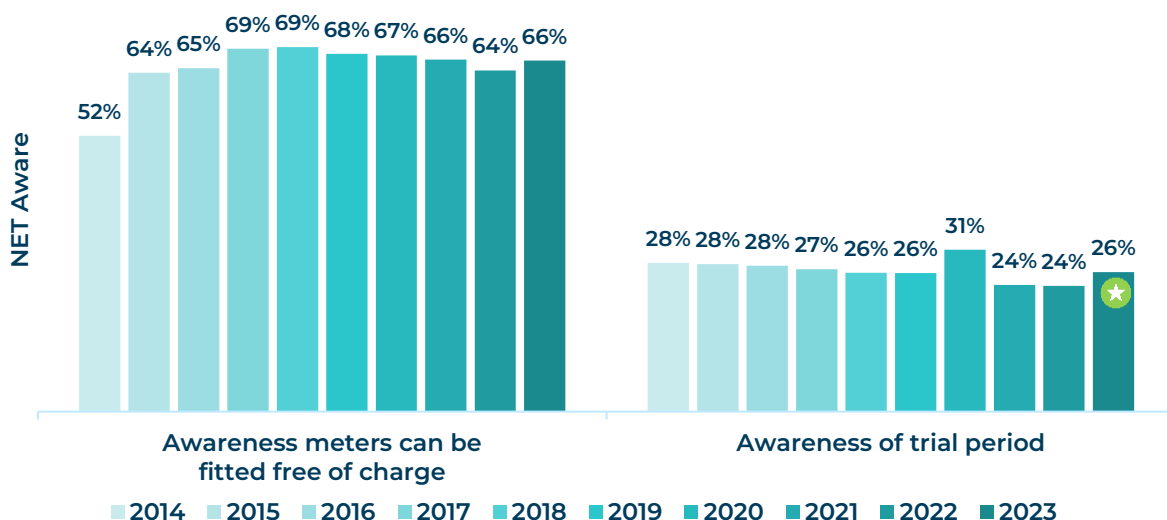
Water meters

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.⁸⁹

- Less than two-thirds of unmetered customers in England and Wales were aware of the free meter scheme (66%), a slight decrease since 2022 (though not significant); the Ten-year trend shows increasing awareness of the free meter scheme (Figure 7).
- However, only 26% of customers in England and Wales were aware of the trial period, significantly higher than 2022.

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

10-year rolling avg. 2014 – 2023	64.7%	26.8%
Change since last year	+2%	+3%
10-year trend	↔	↓



★ Significant difference between 2022-2023 for awareness of trial period

8 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.

9 Historical figures may have changed due to 'Not stated' responses being removed from the base.

Satisfaction with customer services/overall experience

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

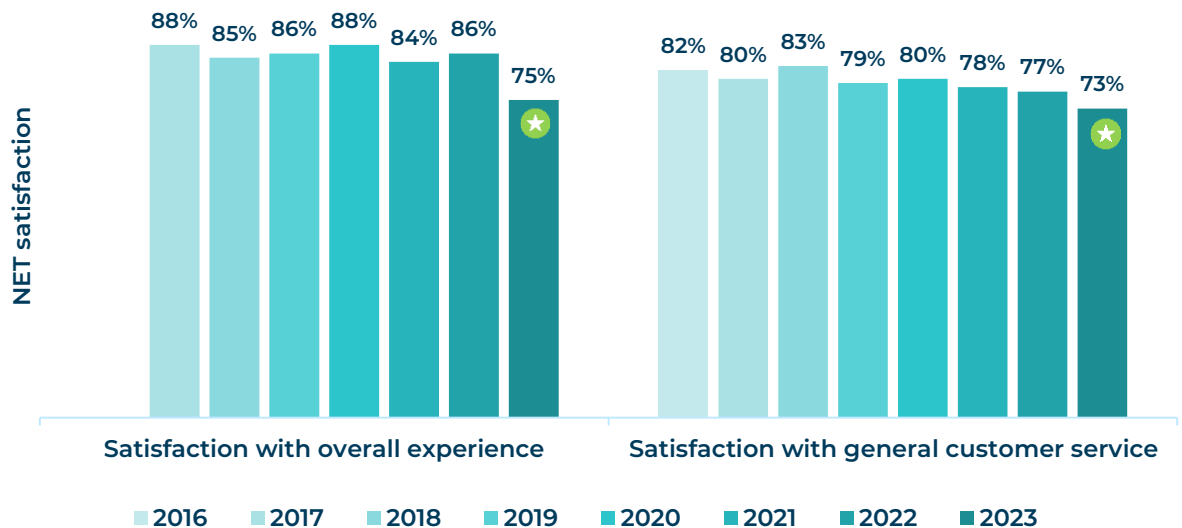
- When asked to consider customer services more generally, including the frequency and content of bills, meter readings and payment options, 73% of customers in England and Wales were satisfied, a significant decrease since 2022 (77%).
- The main reason for dissatisfaction continues to be the lack of communication/information.

The trend for satisfaction with overall experience is now downward, and there have been decreases in performance in 2023.

- 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, 75% of customers in England and Wales were satisfied, a significant decrease since 2022 (86%).

Figure 8: Satisfaction with customer services/overall experience

7/8-year rolling avg. 2016/7 – 2023	84.6%	78.9%
Change since last year	-11%	-5%
7/8-year trend	↓	↓



★ Significant difference between 2022-2023 for satisfaction with overall experience and general customer service

Recommend water company

A question was introduced in 2023 asking consumers whether they would recommend their water company to someone else or not. Over seven in ten respondents said they would recommend their water company. This was a simplified version of a previous

ten point scale question (omitted since 2021), therefore comparisons with previous years are not possible.

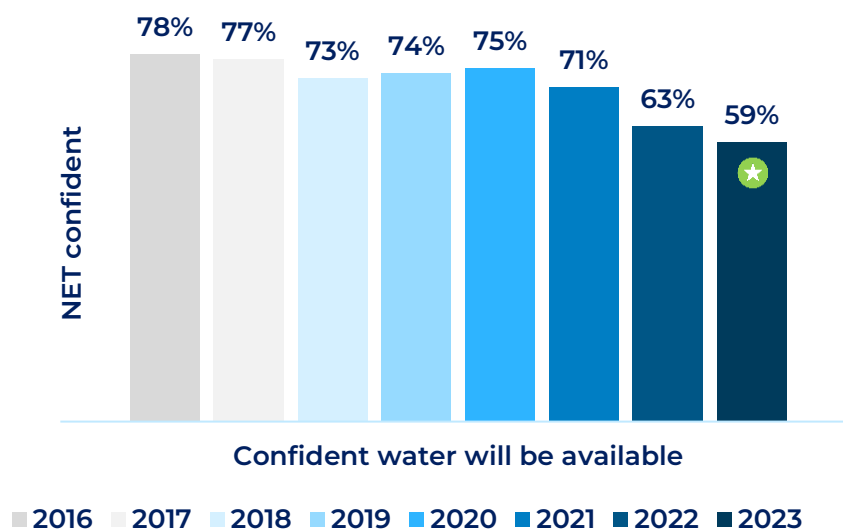
Views on the longer term availability and accessibility of water

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

- Three-fifths of customers in England and Wales were 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 (59%), a significant decrease since 2022 (63%). (Figure 9).
- Of customers who were confident that the water supply will be available, over one quarter said this is because they have never had a problem with water shortages (26%), while one in six mentioned that they have never had a hosepipe ban before (19%). However, one in eight (13%) of customers confident that the water supply will be available, say that there could be a ban or that they don't know what will happen in the future.
- Customers not confident that the water supply will be available said this is because they have already experienced or thought they would experience restrictions (48%), there will be less water in the future due to climate change (26%) or that the companies should spend more on new infrastructure (19%).

Figure 9: Confident water will be available

8-year rolling avg. 2016 – 2023	71.2%
Change since last year	-3%
8-year trend	↓



★ Significant difference between 2022-2023 for confidence water will be available

Protecting the environment

One-third of customers were satisfied with how much their water company does to protect the environment.

New questions were added in 2022 to measure how satisfied customers are with what their water company does to protect the environment and why.

- Only one-third of customers (33%) were satisfied with how much their water company does to protect the environment, a significant decrease since 2022 (45%).
- Customers in Wales were significantly more satisfied than in England (41% compared to 33%).
- Two-fifths said their rating was because there is too much pollution/sewage is put into water (40%).

A new question about availability of water in the local area was added in 2023. Just under half of customers said that there is plenty of water available, with a further one third (35%) saying there are moderate levels of water available. Customers in Wales were significantly more likely to say there is plenty of water available than those in England (67% vs. 46% respectively).

Over half of customers had made a conscious decision to use less water and fewer or shorter showers were the actions taken.

Questions about water usage were also asked during the pilot period in 2023 (later removed due to length of interview). Customers were asked whether they had made a conscious decision to use less water and over half said they had (53%).

Customers were also asked what actions they had taken to reduce water usage: taking showers instead of baths was cited most frequently (30%), followed by spending less time in the shower (23%) and having water butts in the garden (21%).

Around three in ten said the main reason for doing things differently was to save money/reduce their bills, whereas one fifth mentioned helping the environment and being generally more aware of their water usage (21% each).

Over half of customers were aware of campaigns to use water wisely (55%).

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 1.

Table 1: England and Wales significant differences in 2023

Measures	England %/n	England 10-year trend	Wales %/n	Wales 10-year trend
Care about services provided	50%	↓	60%	↔
Level of trust	6.34	↓	6.93	↔
Aware meters can be fitted free of charge	66%	↔	74%	↑
Overall satisfaction with water supply	89%	↓	93%	↓
Overall satisfaction with sewerage services	64%	↓	73%	↓
Confidence in longer term water supply ¹⁰	59%	↓	70%	↓
Overall experience of water/sewerage company ¹¹	75%	↓	80%	↔
Would not recommend water company	19%	n/a	8%	n/a
The feeling that your contact had been or would be resolved	72%	↓	82%	↓
Satisfaction with what water company does to protect the environment	32%	n/a	41%	n/a

There were also significant differences between England and Wales, with higher scores for Wales across most individual attributes about water and sewerage:

- Water pressure
- Taste and smell of tap water
- Hardness/softness of water
- Reducing smells from sewage treatment works
- Maintenance of sewerage pipes and treatment works
- Cleaning waste water properly before releasing it back into the environment
- Minimising sewer flooding
- Perception that there is plenty of water available in the local area

¹⁰ Eight-year trend.

¹¹ Seven-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 on the demographic profile of respondents, which were set to ensure that the profile of respondents was similar to that achieved in previous years to ensure comparability of data.

Fieldwork took place between 26th June 2023 and 25th January 2024. This included a pilot survey of 50 customers to review interview length and routing. A total of 4,952 interviews took place which were an average of 21 minutes and 2 seconds long.

At company level, CCW commissioned 200 interviews for each of the 11 WaSCs, 250 for Affinity Water and 150 for the remaining 7 WoCs which equates to 3,500 interviews (3,502 were achieved). As in previous years, each water company was given the opportunity to boost interview numbers and six companies did so:

- 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 (200 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 2.

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 website¹² on a company-by-company basis.

¹² <https://www.ccwater.org.uk/households/company-performance/>

Analysis

Full data tables are set out below: these are split into three chapters, each exploring a different strand of CCW's [Forward Work Programme](#).

Analysis has been undertaken at total sample level (England and Wales combined), by nation (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 nation, for each water company and for metered and unmetered households.

Table 2: Statistical reliability

	Sample size	10% or 90% ±	30% or 70% ±	50% ±
Total	4,952	0.84	1.28	1.39
England	4,352	0.89	1.36	1.49
Wales	600	2.40	3.67	4.00
Company sample sizes	700	2.22	3.39	3.70
	400	2.94	4.49	4.90
	300	3.39	5.19	5.66
	250	3.72	5.68	6.20
	200	4.16	6.35	6.93
	150	4.80	7.33	8.00

Sample size 150: Cambridge Water, Essex & Suffolk Water, Portsmouth Water, SES Water, South East Water, South Staffs Water

Sample size 200: Anglian Water, Hafren Dyfrdwy, Northumbrian Water, Severn Trent, Thames Water, Wessex Water

Sample size 250: Affinity Water

Sample size 300: Bristol Water

Sample size 400: Dŵr Cymru (Welsh Water), South West Water, Southern Water, Yorkshire Water

Sample size 700: United Utilities

Significant differences between England and Wales, and 2023 cf. 2022 data are highlighted on national charts with a star.

Sample quotas were set for each water company, based on gender, age and socio-economic classification (SEC) within each region that the water company was situated. Targets were based on an average of the numbers achieved over the previous five years surveys to ensure comparability.

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 thirteen years, but trend analysis has been limited to ten years. Where 'don't know' responses are excluded from reported percentages, the rolling ten-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 account properly 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 ten-year averages are based on the total sample size for the water industry in England and Wales, nation (England or Wales) or company as appropriate.

For consistency in approach to trend analysis between 2014 and 2023, the ten-year trends are analysed using the Mann-Kendall method (Mann 1945¹³, Kendall 1975¹⁴). 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 1987¹⁵). Ten-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.

Changes in 2023

- Likelihood to recommend water companies has been re-introduced as a simple Yes/No question rather than the previous 10-point scale.
- Questions have been introduced which build on the emphasis of water saving actions.
 - What actions currently taken
 - Whether this has been a conscious decision or always practiced
 - Awareness of using water wisely campaigns

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

¹⁴Kendall, M.G. 1975. *Rank Correlation Methods*, 4th edition, Charles Griffin, London.

¹⁵Gilbert, Richard O. *Statistical Methods for Environmental Pollution Monitoring*. United States: N. p., 1987

Interpreting the ten-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 7, the year-on-year difference for awareness that meters can be trialled for up to 2 years before deciding whether to go back to a rateable value is shown as 3%. Actual figures are 23.76% in 2022 (shown as 24%) and 26.32% in 2023 (shown as 26%). Although the difference could be shown as 2% (26% minus 24%), it is actually 2.56% and shown as a 3% 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 3% only and are based on all responses.

Where questions haven't been asked of the total sample, base sizes are displayed, e.g. reasons why dissatisfied with customer service.

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

- \uparrow in green indicates a significant upward ten-year trend, or where the ten-year average for a specific company is significantly higher than the ten-year average for aggregate WaSCs or WoCs, or where there has been a significant increase since 2022.
- \downarrow in red indicates a significant downward ten-year trend, or where the ten-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 2022.
- \leftrightarrow in blue indicates a flat trend where there is no significant change over ten years, or no difference in the ten-year company average to the aggregate average for all WaSCs or WoCs, or no significant difference between 2022 and 2023 findings.

Chapter 1: A Trusted Water Sector

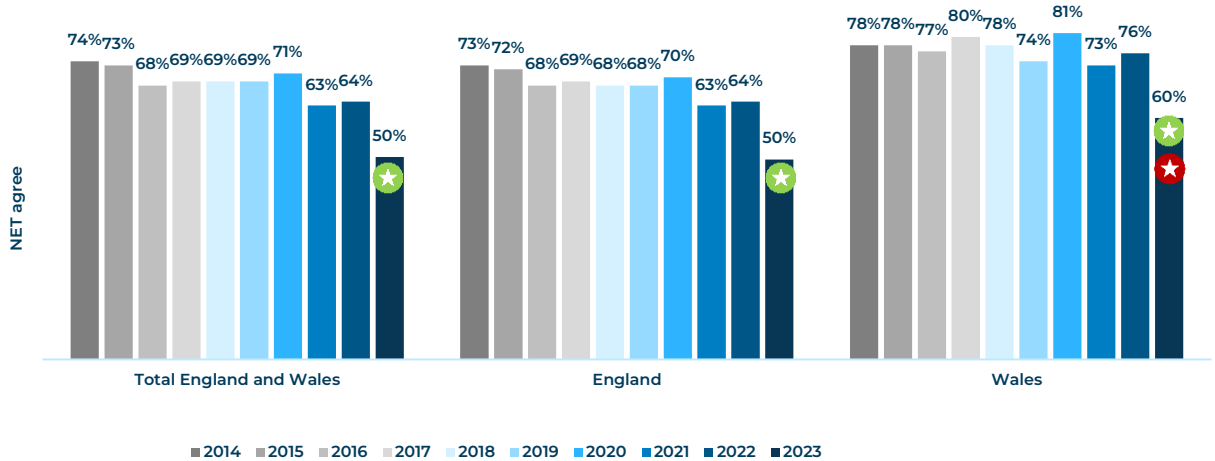
This part of the data report covers customer perceptions of how much water companies care about the services they provide, the level of trust they have in their water company and their likelihood to recommend their water and/or sewerage company to friends and family.

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. Ten-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 3 and Table 4, which follow.

Figure 10: Care about service provision

10-year rolling avg. 2014 – 2023	66.9%	66.3%	75.4%
Change since last year	-14%	-14%	-16%
10-year trend	↓	↓	↔



★ Significant difference between 2022-2023 data in England, Wales and in Total

★ Significant difference between England & Wales 2023

Table 3: Care about service provision – WaSCs

Companies care about service provided to customers	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	66.9%	<p>74% 73% 68% 69% 69% 69% 71% 63% 64% 50%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-14%
Total WaSCs (2023 base sample: 3,417)	67.4%	<p>74% 73% 70% 69% 69% 69% 71% 64% 66% 51%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	51%	-15%
Anglian Water (2023 base sample: 200)	68.6%	<p>75% 77% 68% 73% 69% 69% 71% 69% 63% 54%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-9%
Dŵr Cymru Welsh Water (2023 base sample: 400)	75.4%	<p>78% 78% 76% 79% 79% 75% 81% 72% 76% 60%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-16%
Hafren Dyfrdwy (2023 base sample: 200)	70.9%	<p>72% 69% 75% 75% 74% 62%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-12%
Northumbrian Water (2023 base sample: 201)	73.0%	<p>78% 77% 79% 73% 75% 71% 76% 73% 68% 59%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↑	-9%
Severn Trent (2023 base sample: 200)	70.3%	<p>75% 72% 74% 69% 72% 74% 76% 66% 70% 56%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-14%
South West Water (2023 base sample: 400)	61.9%	<p>67% 66% 66% 62% 62% 62% 71% 63% 63% 43%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-20%
Southern Water (2023 base sample: 400)	58.3%	<p>68% 68% 67% 61% 62% 62% 62% 49% 49% 37%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↓	-12%
Thames Water (2023 base sample: 200)	58.6%	<p>66% 67% 61% 61% 60% 60% 60% 53% 60% 40%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↓	-20%

Companies care about service provided to customers	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	69.0%	<p>78% 75% 69% 69% 70% 70% 72% 65% 70% 52%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-18%
Wessex Water (2023 base sample: 200)	71.3%	<p>78% 77% 74% 74% 70% 75% 80% 64% 68% 53%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-15%
Yorkshire Water (2023 base sample: 400)	71.7%	<p>80% 75% 72% 74% 76% 75% 76% 71% 65% 54%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-12%

Table 4: Care about service provision – WoCs

Companies care about service provided to customers	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	66.9%	<p>74% 73% 68% 69% 69% 69% 71% 63% 64% 50%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-14%
Total WoCs (2023 base sample: 1,535)	64.7%	<p>72% 71% 64% 71% 66% 67% 68% 60% 59% 49%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	49%	-10%
Affinity Water (2023 base sample: 250)	61.4%	<p>69% 66% 60% 66% 61% 65% 66% 56% 57% 48%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-10%
Bristol Water (2023 base sample: 300)	73.5%	<p>77% 77% 65% 81% 74% 82% 80% 75% 70% 55%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-14%
Cambridge Water (2023 base sample: 151)	68.1%	<p>85% 77% 72% 65% 74% 68% 72% 64% 58% 50%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-8%

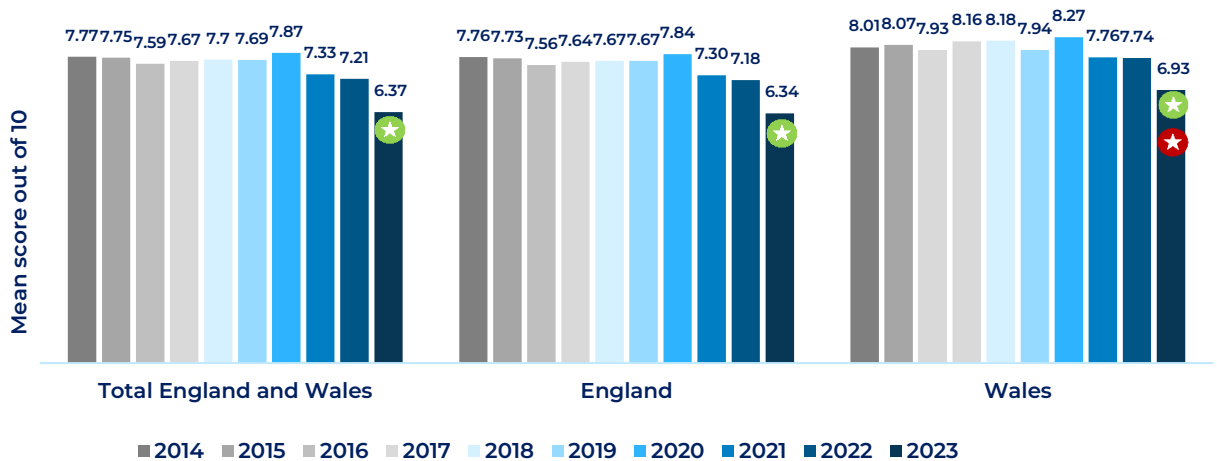
Companies care about service provided to customers	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year																						
Essex & Suffolk Water (2023 base sample: 150)	66.1%	<table border="1"> <caption>Ten-year company trend for Essex & Suffolk Water</caption> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>14</td><td>67%</td></tr> <tr><td>15</td><td>66%</td></tr> <tr><td>16</td><td>68%</td></tr> <tr><td>17</td><td>67%</td></tr> <tr><td>18</td><td>69%</td></tr> <tr><td>19</td><td>64%</td></tr> <tr><td>20</td><td>74%</td></tr> <tr><td>21</td><td>64%</td></tr> <tr><td>22</td><td>65%</td></tr> <tr><td>23</td><td>56%</td></tr> </tbody> </table>	Year	Percentage	14	67%	15	66%	16	68%	17	67%	18	69%	19	64%	20	74%	21	64%	22	65%	23	56%	↔	↔	-9%
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Portsmouth Water (2023 base sample: 150)	66.7%	<table border="1"> <caption>Ten-year company trend for Portsmouth Water</caption> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>14</td><td>82%</td></tr> <tr><td>15</td><td>73%</td></tr> <tr><td>16</td><td>74%</td></tr> <tr><td>17</td><td>68%</td></tr> <tr><td>18</td><td>74%</td></tr> <tr><td>19</td><td>67%</td></tr> <tr><td>20</td><td>72%</td></tr> <tr><td>21</td><td>62%</td></tr> <tr><td>22</td><td>56%</td></tr> <tr><td>23</td><td>39%</td></tr> </tbody> </table>	Year	Percentage	14	82%	15	73%	16	74%	17	68%	18	74%	19	67%	20	72%	21	62%	22	56%	23	39%	↓	↓	-17%
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South East Water (2023 base sample: 150)	59.2%	<table border="1"> <caption>Ten-year company trend for South East Water</caption> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>14</td><td>69%</td></tr> <tr><td>15</td><td>70%</td></tr> <tr><td>16</td><td>59%</td></tr> <tr><td>17</td><td>72%</td></tr> <tr><td>18</td><td>60%</td></tr> <tr><td>19</td><td>60%</td></tr> <tr><td>20</td><td>61%</td></tr> <tr><td>21</td><td>52%</td></tr> <tr><td>22</td><td>50%</td></tr> <tr><td>23</td><td>41%</td></tr> </tbody> </table>	Year	Percentage	14	69%	15	70%	16	59%	17	72%	18	60%	19	60%	20	61%	21	52%	22	50%	23	41%	↓	↓	-10%
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South Staffs Water (2023 base sample: 150)	67.6%	<table border="1"> <caption>Ten-year company trend for South Staffs Water</caption> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>14</td><td>72%</td></tr> <tr><td>15</td><td>81%</td></tr> <tr><td>16</td><td>62%</td></tr> <tr><td>17</td><td>80%</td></tr> <tr><td>18</td><td>68%</td></tr> <tr><td>19</td><td>69%</td></tr> <tr><td>20</td><td>69%</td></tr> <tr><td>21</td><td>63%</td></tr> <tr><td>22</td><td>59%</td></tr> <tr><td>23</td><td>52%</td></tr> </tbody> </table>	Year	Percentage	14	72%	15	81%	16	62%	17	80%	18	68%	19	69%	20	69%	21	63%	22	59%	23	52%	↓	↔	-7%
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SES Water (2023 base sample: 150)	63.0%	<table border="1"> <caption>Ten-year company trend for SES Water</caption> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr><td>14</td><td>77%</td></tr> <tr><td>15</td><td>72%</td></tr> <tr><td>16</td><td>68%</td></tr> <tr><td>17</td><td>66%</td></tr> <tr><td>18</td><td>61%</td></tr> <tr><td>19</td><td>67%</td></tr> <tr><td>20</td><td>57%</td></tr> <tr><td>21</td><td>55%</td></tr> <tr><td>22</td><td>51%</td></tr> <tr><td>23</td><td>57%</td></tr> </tbody> </table>	Year	Percentage	14	77%	15	72%	16	68%	17	66%	18	61%	19	67%	20	57%	21	55%	22	51%	23	57%	↓	↔	+6%
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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 5 and Table 6, which follow.

Figure 11: Trust in water/sewerage companies

10-year rolling avg. 2014 – 2023	7.49	7.47	7.90
Change since last year	-0.84	-0.84	-0.81
10-year trend	↓	↓	↔



★ Significant difference between 2022-2023 data in England, Wales and in Total

★ Significant difference between England & Wales 2023

Table 5: Trust in water/sewerage companies – WaSCs

Level of trust in water companies	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	7.49	<p>7.77 7.75 7.59 7.67 7.70 7.69 7.87 7.33 7.21 6.37</p>	↓	n/a	-0.84
Total WaSCs (2023 base sample: 3,417)	7.51	<p>7.77 7.73 7.62 7.67 7.72 7.67 7.86 7.39 7.27 6.38</p>	↓	6.38	-0.89
Anglian Water (2023 base sample: 200)	7.59	<p>7.90 7.79 7.60 7.93 7.72 7.69 7.89 7.66 7.30 6.45</p>	↓	↔	-0.85

Level of trust in water companies	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Dŵr Cymru Welsh Water (2023 base sample: 400)	7.91	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>8.03</td><td>8.06</td><td>7.93</td><td>8.15</td><td>8.20</td><td>7.95</td><td>8.30</td><td>7.75</td><td>7.74</td><td>6.94</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	8.03	8.06	7.93	8.15	8.20	7.95	8.30	7.75	7.74	6.94	↔	↔	-0.81
Year	14	15	16	17	18	19	20	21	22	23																	
Score	8.03	8.06	7.93	8.15	8.20	7.95	8.30	7.75	7.74	6.94																	
Hafren Dyfrdwy (2023 base sample: 200)	7.65	<table border="1"> <tr><th>Year</th><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.97</td><td>7.78</td><td>7.85</td><td>7.84</td><td>7.66</td><td>6.83</td></tr> </table>	Year	18	19	20	21	22	23	Score	7.97	7.78	7.85	7.84	7.66	6.83	↓	↔	-0.83								
Year	18	19	20	21	22	23																					
Score	7.97	7.78	7.85	7.84	7.66	6.83																					
Northumbrian Water (2023 base sample: 201)	7.88	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>8.18</td><td>8.15</td><td>7.95</td><td>8.01</td><td>7.96</td><td>7.96</td><td>8.16</td><td>7.70</td><td>7.81</td><td>6.90</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	8.18	8.15	7.95	8.01	7.96	7.96	8.16	7.70	7.81	6.90	↓	↔	-0.91
Year	14	15	16	17	18	19	20	21	22	23																	
Score	8.18	8.15	7.95	8.01	7.96	7.96	8.16	7.70	7.81	6.90																	
Severn Trent (2023 base sample: 200)	7.61	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.85</td><td>7.69</td><td>7.70</td><td>7.60</td><td>7.79</td><td>7.74</td><td>8.04</td><td>7.61</td><td>7.54</td><td>6.57</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.85	7.69	7.70	7.60	7.79	7.74	8.04	7.61	7.54	6.57	↔	↔	-0.97
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.85	7.69	7.70	7.60	7.79	7.74	8.04	7.61	7.54	6.57																	
South West Water (2023 base sample: 400)	7.15	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.16</td><td>7.25</td><td>7.29</td><td>7.27</td><td>7.19</td><td>7.56</td><td>7.72</td><td>7.21</td><td>7.00</td><td>6.14</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.16	7.25	7.29	7.27	7.19	7.56	7.72	7.21	7.00	6.14	↔	↔	-0.86
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.16	7.25	7.29	7.27	7.19	7.56	7.72	7.21	7.00	6.14																	
Southern Water (2023 base sample: 400)	6.94	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.35</td><td>7.28</td><td>7.37</td><td>7.31</td><td>7.13</td><td>7.38</td><td>7.31</td><td>6.53</td><td>6.26</td><td>5.44</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.35	7.28	7.37	7.31	7.13	7.38	7.31	6.53	6.26	5.44	↓	↓	-0.82
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.35	7.28	7.37	7.31	7.13	7.38	7.31	6.53	6.26	5.44																	
Thames Water (2023 base sample: 200)	7.04	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.35</td><td>7.40</td><td>7.31</td><td>7.17</td><td>7.57</td><td>7.04</td><td>7.20</td><td>6.86</td><td>6.72</td><td>5.79</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.35	7.40	7.31	7.17	7.57	7.04	7.20	6.86	6.72	5.79	↓	↓	-0.93
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.35	7.40	7.31	7.17	7.57	7.04	7.20	6.86	6.72	5.79																	
United Utilities (2023 base sample: 700)	7.64	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>8.00</td><td>7.80</td><td>7.72</td><td>7.77</td><td>7.66</td><td>7.86</td><td>8.09</td><td>7.45</td><td>7.41</td><td>6.62</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	8.00	7.80	7.72	7.77	7.66	7.86	8.09	7.45	7.41	6.62	↓	↔	-0.79
Year	14	15	16	17	18	19	20	21	22	23																	
Score	8.00	7.80	7.72	7.77	7.66	7.86	8.09	7.45	7.41	6.62																	
Wessex Water (2023 base sample: 200)	7.75	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.94</td><td>7.97</td><td>7.75</td><td>7.86</td><td>8.08</td><td>8.19</td><td>8.31</td><td>7.43</td><td>7.46</td><td>6.53</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.94	7.97	7.75	7.86	8.08	8.19	8.31	7.43	7.46	6.53	↔	↔	-0.93
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.94	7.97	7.75	7.86	8.08	8.19	8.31	7.43	7.46	6.53																	
Yorkshire Water (2023 base sample: 400)	7.75	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Score</th><td>7.89</td><td>8.05</td><td>7.72</td><td>7.99</td><td>7.94</td><td>8.06</td><td>8.06</td><td>7.68</td><td>7.50</td><td>6.63</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Score	7.89	8.05	7.72	7.99	7.94	8.06	8.06	7.68	7.50	6.63	↔	↔	-0.87
Year	14	15	16	17	18	19	20	21	22	23																	
Score	7.89	8.05	7.72	7.99	7.94	8.06	8.06	7.68	7.50	6.63																	

Table 6: Trust in water companies – WoCs

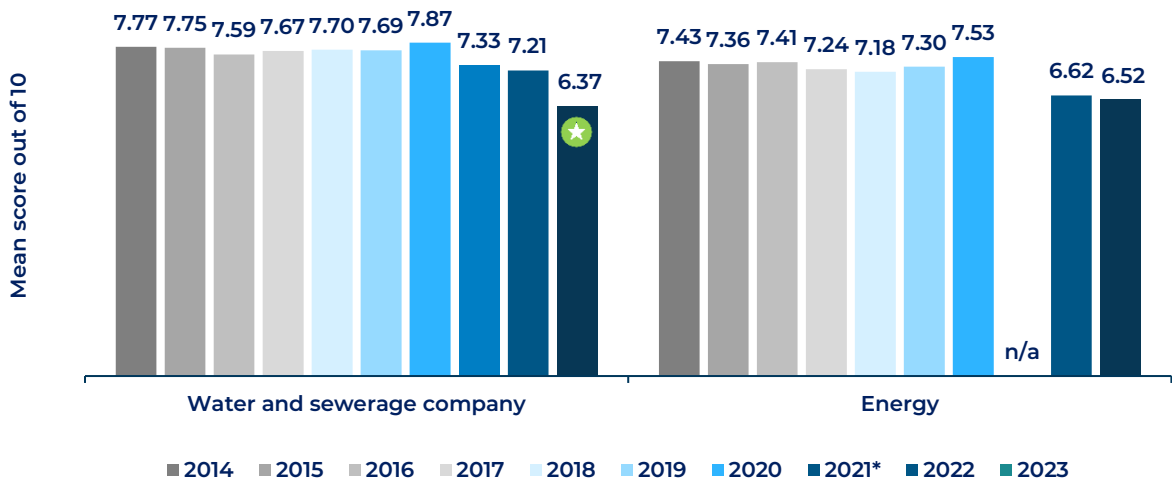
Level of trust in water companies	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	7.49	<p>7.77 7.75 7.59 7.67 7.70 7.69 7.87 7.33 7.21 6.37</p> <p>Year</p>	↓	n/a	-0.84
Total WoCs (2023 base sample: 1,535)	7.44	<p>7.78 7.83 7.46 7.69 7.61 7.74 7.91 7.08 7.01 6.33</p> <p>Year</p>	↓	6.33	-0.68
Affinity Water (2023 base sample: 250)	7.34	<p>7.74 7.65 7.46 7.41 7.43 7.77 7.82 6.93 6.86 6.35</p> <p>Year</p>	↓	↔	-0.51
Bristol Water (2023 base sample: 300)	7.70	<p>7.73 7.81 7.32 8.05 8.12 8.15 8.22 7.48 7.54 6.54</p> <p>Year</p>	↔	↔	-1.00
Cambridge Water (2023 base sample: 151)	7.64	<p>8.19 7.71 7.63 7.90 8.11 7.99 7.73 7.46 7.34 6.37</p> <p>Year</p>	↓	↔	-0.98
Essex & Suffolk Water (2023 base sample: 150)	7.53	<p>7.63 7.93 7.48 7.55 7.59 7.59 8.14 7.29 7.23 6.93</p> <p>Year</p>	↓	↔	-0.30
Portsmouth Water (2023 base sample: 150)	7.53	<p>8.19 7.67 7.64 8.20 7.80 7.87 8.10 7.07 6.85 5.89</p> <p>Year</p>	↓	↔	-0.97
South East Water (2023 base sample: 150)	7.12	<p>7.66 7.87 7.21 7.44 7.39 7.36 7.60 6.63 6.58 5.49</p> <p>Year</p>	↓	↓	-1.09
South Staffs Water (2023 base sample: 150)	7.60	<p>7.75 8.19 7.62 8.02 7.57 7.87 8.00 7.25 7.17 6.52</p> <p>Year</p>	↓	↔	-0.65
SES Water (2023 base sample: 150)	7.43	<p>7.90 7.61 7.26 7.82 7.52 7.58 7.63 7.23 7.07 6.72</p> <p>Year</p>	↓	↔	-0.35

1.3 Level of trust compared to gas/electricity companies

Reintroduced in 2022 after a one year break, a comparative question was asked about the level of trust in gas and/or electricity companies on the same 1 to 10 scale. National level trends are shown comparing mean scores with water and sewerage companies in Figure 12 below.

Figure 12: Level of trust in water/sewerage and gas/electricity companies

10-year rolling avg. 2014 – 2023	7.49	7.17
Change since last year	-0.84	-0.10
10-year trend	↓	↔

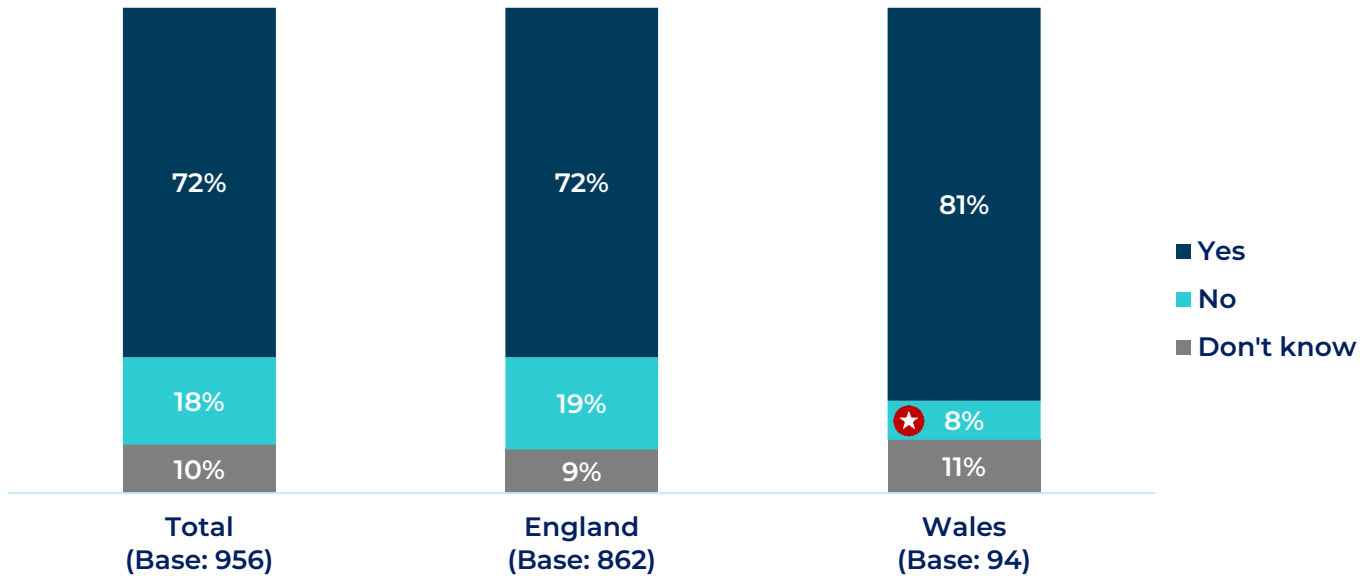


★ Significant difference for water and sewerage company between 2022-2023

1.4 Recommend water company

A question was introduced in 2023 asking consumers whether they would recommend their water company to someone else. The results are shown in Figure 13. The question was only included in the pilot period of fieldwork – therefore base sizes are lower.

Figure 13: Recommend water company



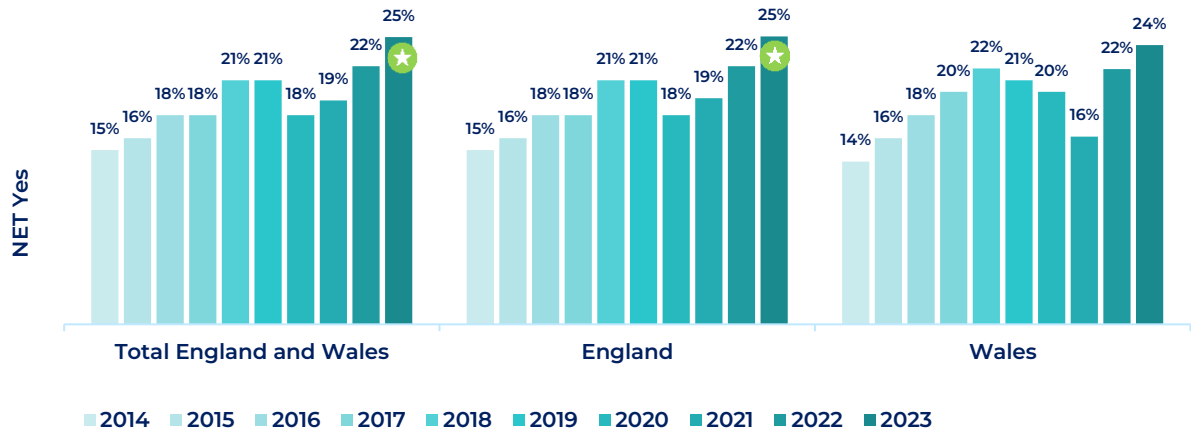
* Significant difference for saying 'No' between England & Wales 2023

1.5 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 14 shows contact trends for England and Wales and for each nation. This is followed by contact trends for each WaSC in Table 7 and for each WoC in 8.

Figure 14: Contact with the water/sewerage company

10-year rolling avg. 2014 – 2023	19.4%	19.4%	19.2%
Change since last year	+3%	+3%	+2%
10-year trend	↑	↑	↑



★ Significant difference between 2022-2023 data in England and in Total

Table 7: Contact with the water/sewerage company - WaSCs

Contact with your water and/or sewerage company	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	19.4%		↑	n/a	+3%
Total WaSCs (2023 base sample: 3,417)	19.6%		↑	25%	+3%
Anglian Water (2023 base sample: 200)	20.5%		↔	↔	-1%
Dŵr Cymru Welsh Water (2023 base sample: 400)	19.2%		↑	↔	+3%
Hafren Dyfrdwy (2023 base sample: 200)	21.4%		↔	↓	-5%
Northumbrian Water (2023 base sample: 201)	16.2%		↑	↓	-4%

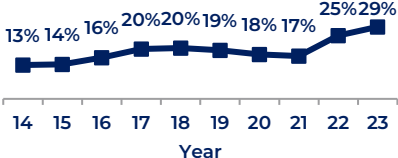
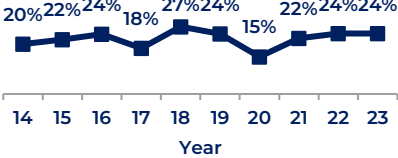
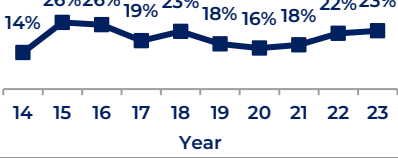
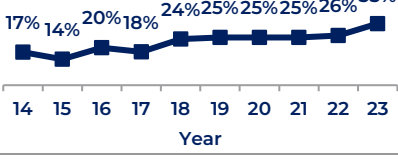
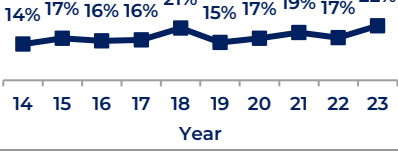
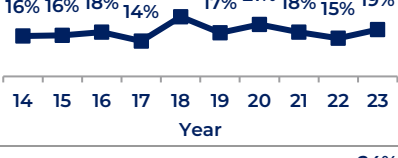

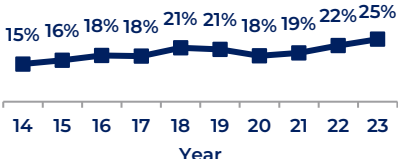
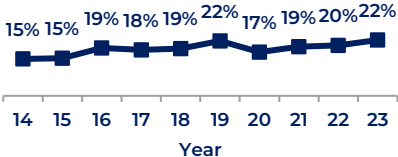
Contact with your water and/or sewerage company	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Severn Trent (2023 base sample: 200)	19.1%		↑	↔	+4%
South West Water (2023 base sample: 400)	21.9%		↔	↔	0%
Southern Water (2023 base sample: 400)	20.5%		↔	↔	+1%
Thames Water (2023 base sample: 200)	22.7%		↑	↑	+6%
United Utilities (2023 base sample: 700)	17.2%		↑	↔	+5%
Wessex Water (2023 base sample: 200)	17.6%		↔	↓	+3%
Yorkshire Water (2023 base sample: 400)	19.2%		↑	↔	+2%

Table 8: Contact with the water/sewerage company – WoCs

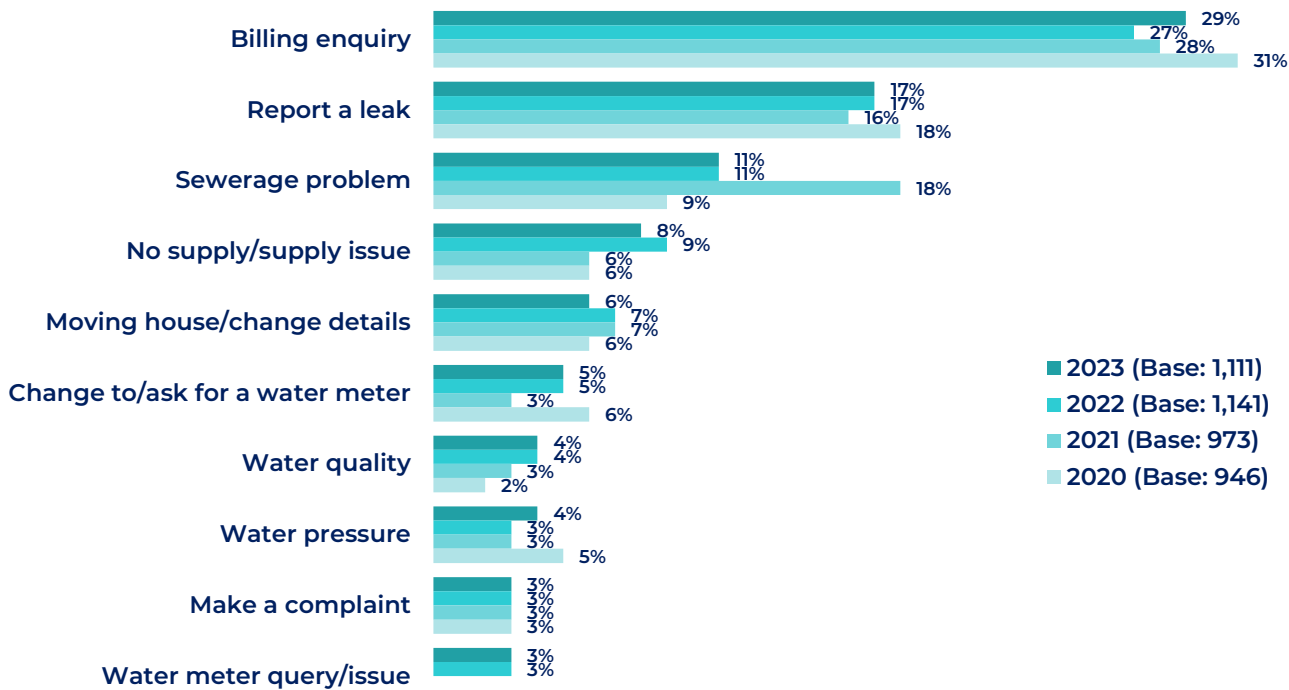
Contact with your water and/or sewerage company	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	19.4%		↑	n/a	+3%
Total WoCs (2023 base sample: 1,535)	18.5%		↑	22%	+2%

Contact with your water and/or sewerage company	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Affinity Water (2023 base sample: 250)	19.5%		↑	↔	-5%
Bristol Water (2023 base sample: 300)	16.7%		↔	↔	+6%
Cambridge Water (2023 base sample: 151)	19.0%		↑	↔	-2%
Essex & Suffolk Water (2023 base sample: 150)	18.7%		↑	↔	+1%
Portsmouth Water (2023 base sample: 150)	17.1%		↔	↔	+7%
South East Water (2023 base sample: 150)	20.7%		↔	↑	+9%
South Staffs Water (2023 base sample: 150)	15.6%		↑	↔	+4%
SES Water (2023 base sample: 150)	17.5%		↑	↔	+1%

1.6 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 15 shows the main reasons over the past 4 years.

Figure 15: Reason for contact



Footnote: Reasons for contact below 3% for 2023 are not shown.

1.7 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 16 and Figure 17 show national trends for the last ten years for each aspect of contact. This is followed by Figure which compares 2023 satisfaction between England and Wales, and Table 9 and Table 10 which show 2023 satisfaction with aspects of service for each WaSC and each WoC respectively, and Table 11 and Table 12 which highlight the ten-year trends by WaSC and by WoC.

Figure 16: Satisfaction with aspects of contact

10-year rolling avg. 2014 – 2023	80.8%	79.4%	83.5%
Change since last year	-1%	-3%	0%
10-year trend	↓	↓	↓

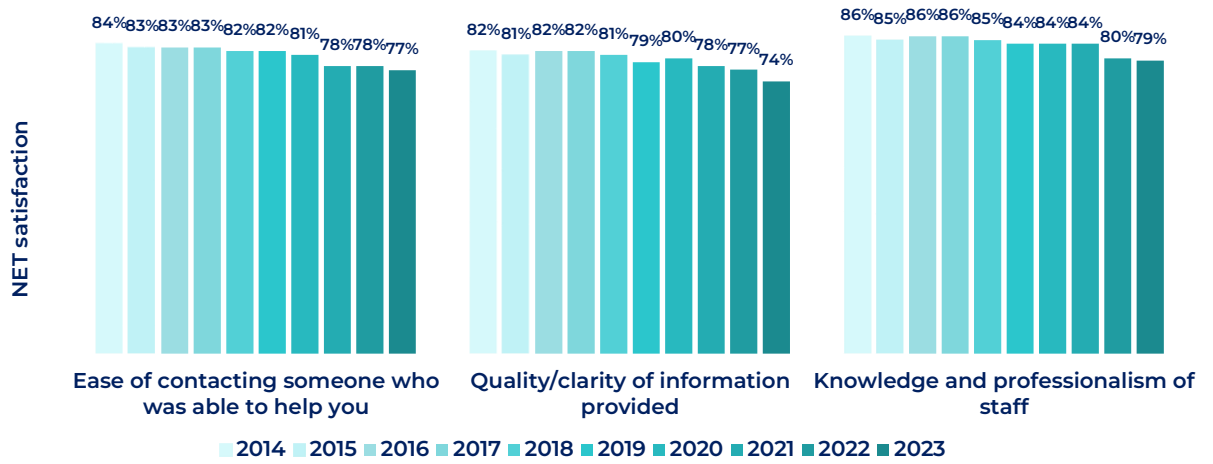


Figure 17: Satisfaction with aspects of contact

10-year rolling avg. 2014 – 2023	78.2%	73.3%
Change since last year	-2%	-2%
10-year trend	↓	↓

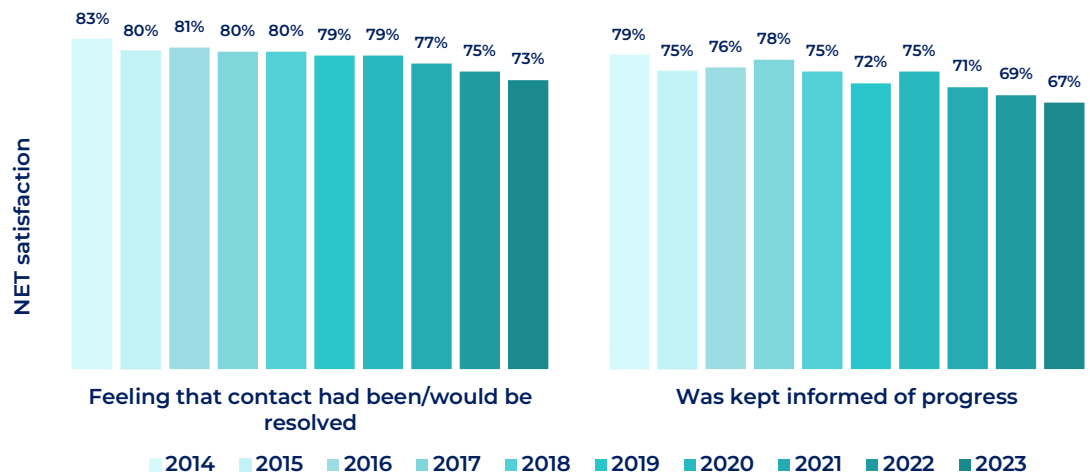
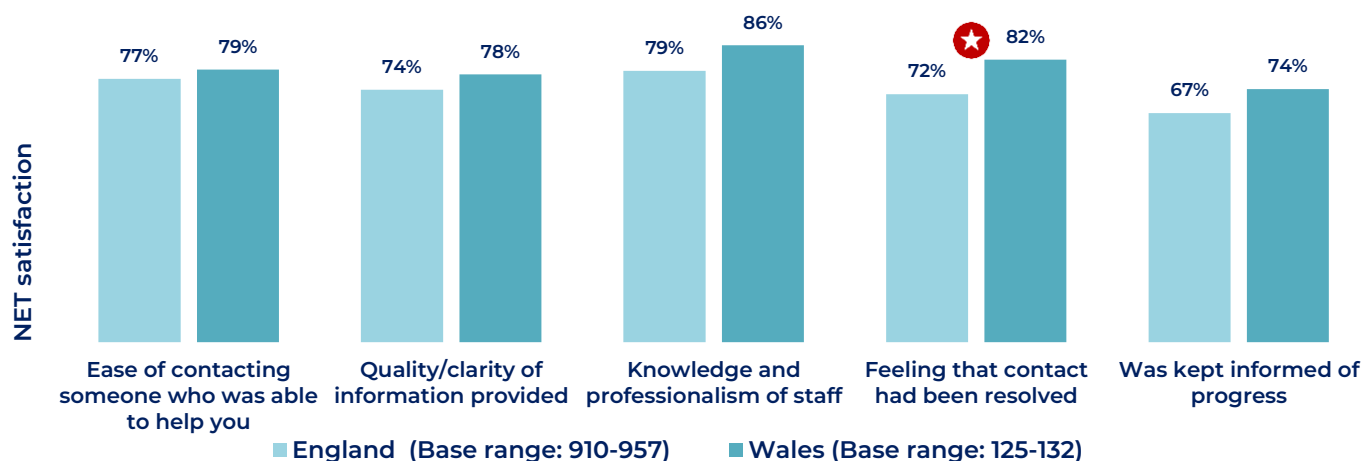


Figure 18: Satisfaction with aspects of contact by nation



★ Significant difference between England & Wales 2023

Table 9: Satisfaction with aspects of contact in 2023 – WaSCs

Satisfaction with aspects of contact (2023 data only) ¹⁶	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 (2023 base range: 1035-1088)	77%	74%	79%	73%	67%
Total WaSCs (2023 base range: 735-774)	77%	73%	79%	73%	68%
Anglian Water (2023 base range: 48-50)	86%	80%	82%	77%	78%
Dŵr Cymru Welsh Water (2023 base range: 91-94)	80%	78%	87%	84%	75%
Hafren Dyfrdwy (2023 base range: 31-38)	74%	70%	78%	62%	56%
Northumbrian Water (2023 base range: 31-32)	94%	94%	94%	100%	88%
Severn Trent (2023 base range: 54-57)	75%	74%	80%	77%	67%
South West Water (2023 base range: 90-95)	71%	72%	81%	73%	61%
Southern Water (2023 base range: 83-88)	58%	59%	64%	51%	49%
Thames Water (2023 base range: 61-64)	70%	60%	68%	63%	57%
United Utilities (2023 base range: 139-146)	78%	80%	86%	74%	74%
Wessex Water (2023 base range: 35-37)	78%	76%	78%	73%	71%
Yorkshire Water (2023 base range: 82-93)	88%	82%	89%	81%	77%

¹⁶ Companies with the highest levels of perceived performance are highlighted in green text whilst lowest levels are highlighted in red. Caution low base sizes for some companies.

Table 10: Satisfaction with aspects of contact 2023 – WoCs

Satisfaction with aspects of contact (2023 data only) ¹⁸	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 (2023 base range: 1035-1088)	77%	74%	79%	73%	67%
Total WoCs (2023 base range: 300-314)	77%	77%	80%	72%	64%
Affinity Water (2023 base range: 44-47)	85%	83%	80%	74%	73%
Bristol Water (2023 base range: 56-57)	79%	86%	84%	80%	75%
Cambridge Water (2023 base range: 25-28)	79%	82%	89%	82%	68%
Essex & Suffolk Water (2023 base range: 30-33)	81%	85%	90%	79%	73%
Portsmouth Water (2023 base range: 27-31)	70%	77%	79%	77%	67%
South East Water (2023 base range: 41-45)	71%	66%	73%	63%	45%
South Staffs Water (2023 base range: 28-29)	61%	68%	79%	59%	61%
SES Water (2023 base range: 30-31)	77%	77%	83%	74%	67%

Table 11: Satisfaction with aspects of contact – WaSC Ten-year trends (arrows) and Ten-year rolling averages (figures)

Satisfaction with aspects of contact (2023 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 (2023 base range: 1035-1088)	80.8% ↓	79.4% ↓	83.5% ↓	78.2% ↓	73.3% ↓
Total WaSCs (2023 base range: 735-774)	80.7% ↓	79.3% ↓	83.5% ↓	78.3% ↓	73.6% ↓
Anglian Water (2023 base range: 48-50)	84.0% ↔	83.8% ↔	85.4% ↔	82.1% ↔	77.3% ↑
Dŵr Cymru Welsh Water (2023 base range: 91-94)	85.7% ↓	83.7% ↔	87.4% ↔	83.3% ↓	79.2% ↔
Hafren Dyfrdwy (2023 base range: 31-38)	79.2% ↔	78.0% ↔	85.1% ↔	78.1% ↔	73.4% ↔
Northumbrian Water (2023 base range: 31-32)	85.7% ↔	84.5% ↑	87.6% ↔	83.5% ↔	76.5% ↔
Severn Trent (2023 base range: 54-57)	82.3% ↓	82.0% ↓	86.3% ↓	80.4% ↓	75.6% ↓
South West Water (2023 base range: 90-95)	80.2% ↔	77.4% ↓	83.6% ↓	78.8% ↓	72.8% ↔
Southern Water (2023 base range: 83-88)	73.5% ↔	69.5% ↔	74.8% ↔	68.5% ↔	60.7% ↓
Thames Water (2023 base range: 61-64)	72.2% ↓	69.5% ↓	75.6% ↓	71.0% ↓	64.9% ↓
United Utilities (2023 base range: 139-146)	83.4% ↔	82.9% ↔	87.0% ↔	79.7% ↔	78.6% ↔
Wessex Water (2023 base range: 35-37)	88.4% ↔	86.1% ↔	87.7% ↓	84.7% ↓	81.2% ↓

Satisfaction with aspects of contact (2023 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
Yorkshire Water (2023 base range: 82-93)	85.0% ↔	84.4% ↓	86.9% ↓	82.3% ↔	78.2% ↓

Table 12: Satisfaction with aspects of contact – WoC Ten-year trends (arrows) and Ten-year rolling averages (figures)

Satisfaction with aspects of contact (2023 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 (2023 base range: 1035-1088)	80.8% ↓	79.4% ↓	83.5% ↓	78.2% ↓	73.3% ↓
Total WoCs (2023 base range: 300-314)	81.1% ↓	79.9% ↔	83.8% ↔	77.7% ↓	72.0% ↓
Affinity Water (2023 base range: 44-47)	77.7% ↔	77.1% ↔	83.3% ↔	76.3% ↔	70.3% ↔
Bristol Water (2023 base range: 56-57)	85.8% ↔	86.5% ↔	88.5% ↑	83.2% ↔	79.5% ↔
Cambridge Water (2023 base range: 25-28)	78.7% ↓	80.6% ↓	83.8% ↓	81.2% ↔	72.4% ↓
Essex & Suffolk Water (2023 base range: 30-33)	85.5% ↔	86.3% ↔	87.8% ↔	82.5% ↔	78.0% ↓
Portsmouth Water (2023 base range: 27-31)	82.7% ↔	80.9% ↔	84.5% ↔	83.3% ↓	76.1% ↓
South East Water (2023 base range: 41-45)	79.9% ↔	75.8% ↔	79.9% ↔	72.3% ↔	66.3% ↔
South Staffs Water (2023 base range: 28-29)	79.4% ↓	78.6% ↔	82.9% ↔	74.9% ↔	69.7% ↔
SES Water (2023 base range: 30-31)	83.2% ↓	79.3% ↓	82.8% ↓	78.0% ↓	68.5% ↓

1.7 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 19 shows the ten-year trend for overall satisfaction with contact for England and Wales and for each nation. This is followed by Table 13 and Table 14 which show satisfaction by each WaSC and each WoC in turn¹⁷.

Figure 19: Overall satisfaction with water company contact handling

10-year rolling avg. 2014 – 2023	79.2%	79.0%	82.9%
Change since last year	-2%	-2%	-5%
10-year trend	↓	↓	↔

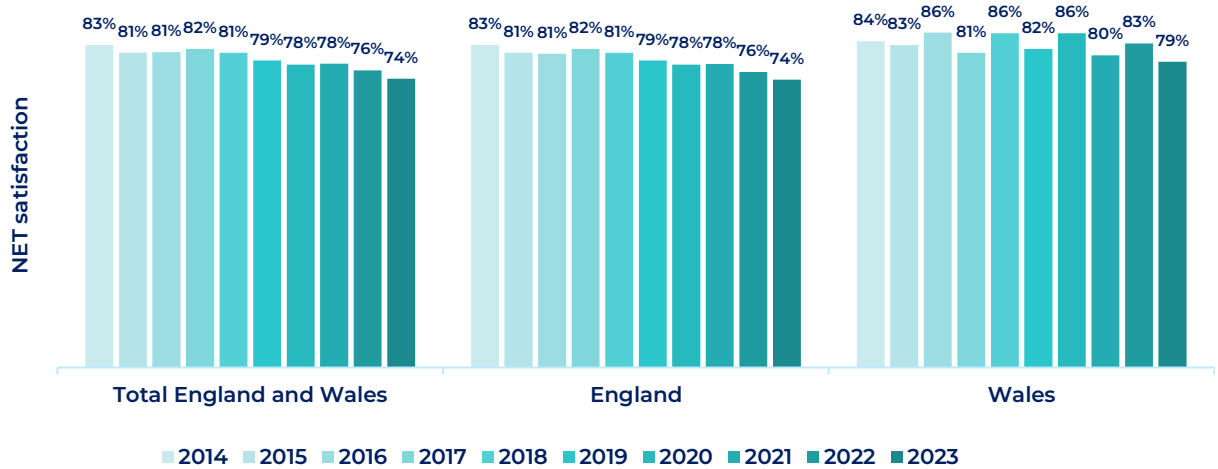


Table 13: Overall satisfaction with water company contact handling – WaSCs

Satisfaction with contact handling	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 1,105)	79.2%		↓	n/a	-2%
Total WaSCs (2023 base sample: 787)	79.4%		↓	74%	-3%
Anglian Water (2023 base sample: 49)	84.2%		↔	↔	+4%

¹⁷ Caution low base sizes for some companies.

Satisfaction with contact handling	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Dŵr Cymru Welsh Water (2023 base sample: 96)	83.0%	<table border="1"> <caption>Ten-year company trend for Dŵr Cymru Welsh Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>83%</td><td>83%</td><td>85%</td><td>80%</td><td>87%</td><td>81%</td><td>86%</td><td>81%</td><td>84%</td><td>79%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	83%	83%	85%	80%	87%	81%	86%	81%	84%	79%	↔	↔	-5%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	83%	83%	85%	80%	87%	81%	86%	81%	84%	79%																	
Hafren Dyfrdwy (2023 base sample: 38)	76.9%	<table border="1"> <caption>Ten-year company trend for Hafren Dyfrdwy</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>73%</td><td>88%</td><td>81%</td><td>69%</td><td>77%</td><td>71%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	73%	88%	81%	69%	77%	71%	↔	↔	-6%				
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Satisfaction	73%	88%	81%	69%	77%	71%																					
Northumbrian Water (2023 base sample: 32)	85.3%	<table border="1"> <caption>Ten-year company trend for Northumbrian Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>82%</td><td>86%</td><td>87%</td><td>81%</td><td>88%</td><td>76%</td><td>92%</td><td>77%</td><td>90%</td><td>94%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	82%	86%	87%	81%	88%	76%	92%	77%	90%	94%	↔	↑	+4%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	82%	86%	87%	81%	88%	76%	92%	77%	90%	94%																	
Severn Trent (2023 base sample: 57)	82.3%	<table border="1"> <caption>Ten-year company trend for Severn Trent</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>88%</td><td>82%</td><td>91%</td><td>77%</td><td>88%</td><td>82%</td><td>85%</td><td>82%</td><td>82%</td><td>74%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	88%	82%	91%	77%	88%	82%	85%	82%	82%	74%	↓	↔	-8%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	88%	82%	91%	77%	88%	82%	85%	82%	82%	74%																	
South West Water (2023 base sample: 95)	77.1%	<table border="1"> <caption>Ten-year company trend for South West Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>82%</td><td>78%</td><td>85%</td><td>81%</td><td>77%</td><td>81%</td><td>69%</td><td>76%</td><td>73%</td><td>72%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	82%	78%	85%	81%	77%	81%	69%	76%	73%	72%	↓	↔	-1%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	82%	78%	85%	81%	77%	81%	69%	76%	73%	72%																	
Southern Water (2023 base sample: 91)	67.9%	<table border="1"> <caption>Ten-year company trend for Southern Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>69%</td><td>66%</td><td>71%</td><td>70%</td><td>77%</td><td>72%</td><td>58%</td><td>69%</td><td>74%</td><td>52%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	69%	66%	71%	70%	77%	72%	58%	69%	74%	52%	↔	↓	-22%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	69%	66%	71%	70%	77%	72%	58%	69%	74%	52%																	
Thames Water (2023 base sample: 64)	71.6%	<table border="1"> <caption>Ten-year company trend for Thames Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>83%</td><td>74%</td><td>69%</td><td>80%</td><td>73%</td><td>71%</td><td>67%</td><td>72%</td><td>65%</td><td>69%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	83%	74%	69%	80%	73%	71%	67%	72%	65%	69%	↓	↔	+3%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	83%	74%	69%	80%	73%	71%	67%	72%	65%	69%																	
United Utilities (2023 base sample: 150)	81.5%	<table border="1"> <caption>Ten-year company trend for United Utilities</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>84%</td><td>73%</td><td>85%</td><td>83%</td><td>85%</td><td>91%</td><td>87%</td><td>75%</td><td>77%</td><td>77%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	84%	73%	85%	83%	85%	91%	87%	75%	77%	77%	↔	↔	0%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	84%	73%	85%	83%	85%	91%	87%	75%	77%	77%																	
Wessex Water (2023 base sample: 37)	86.6%	<table border="1"> <caption>Ten-year company trend for Wessex Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>96%</td><td>86%</td><td>86%</td><td>89%</td><td>84%</td><td>85%</td><td>88%</td><td>89%</td><td>93%</td><td>73%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	96%	86%	86%	89%	84%	85%	88%	89%	93%	73%	↔	↔	-20%
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Satisfaction	96%	86%	86%	89%	84%	85%	88%	89%	93%	73%																	
Yorkshire Water (2023 base sample: 94)	83.2%	<table border="1"> <caption>Ten-year company trend for Yorkshire Water</caption> <thead> <tr><th>Year</th><th>2014</th><th>2015</th><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th></tr> </thead> <tbody> <tr><td>Satisfaction</td><td>92%</td><td>93%</td><td>79%</td><td>85%</td><td>82%</td><td>79%</td><td>82%</td><td>79%</td><td>83%</td><td>81%</td></tr> </tbody> </table>	Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Satisfaction	92%	93%	79%	85%	82%	79%	82%	79%	83%	81%	↓	↔	-2%
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023																	
Satisfaction	92%	93%	79%	85%	82%	79%	82%	79%	83%	81%																	

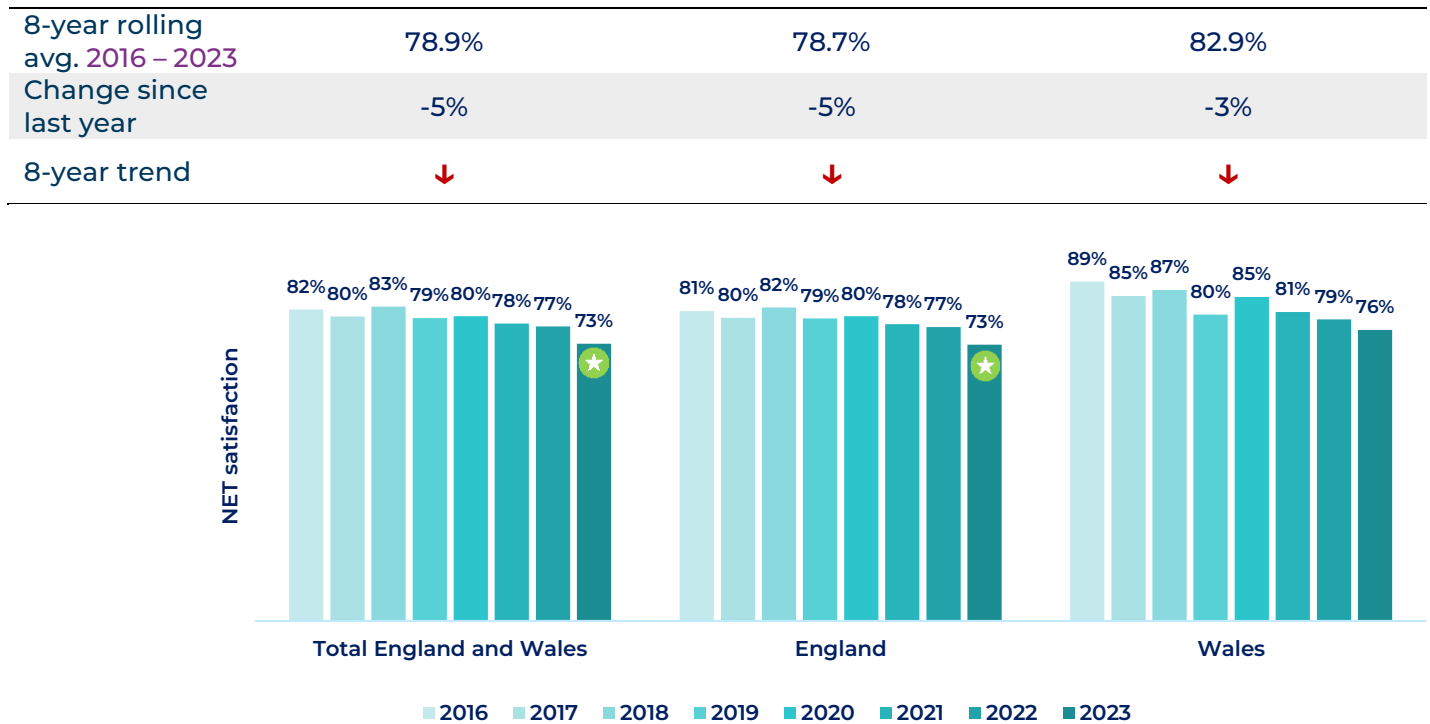
Table 14: Overall satisfaction with water company contact handling – WoCs

Satisfaction with contact handling	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 1,105)	79.2%	<p>83% 81% 81% 82% 81% 79% 78% 78% 76% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-2%
Total WoCs (2022 base sample: 318)	78.5%	<p>75% 85% 82% 84% 79% 78% 77% 78% 74% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	74%	+1%
Affinity Water (2022 base sample: 47)	76.1%	<p>73% 82% 77% 79% 73% 74% 71% 78% 75% 81%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	+6%
Bristol Water (2022 base sample: 57)	86.7%	<p>77% 92% 84% 86% 90% 85% 91% 91% 85% 84%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-1%
Cambridge Water (2022 base sample: 28)	79.8%	<p>86% 100% 75% 73% 91% 78% 79% 66% 78% 82%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	+4%
Essex & Suffolk Water (2022 base sample: 33)	81.7%	<p>68% 91% 79% 91% 90% 87% 80% 70% 81% 79%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-2%
Portsmouth Water (2022 base sample: 31)	82.7%	<p>88% 78% 90% 88% 86% 76% 96% 68% 81% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-7%
South East Water (2022 base sample: 45)	74.7%	<p>68% 83% 82% 88% 74% 77% 72% 76% 69% 62%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-6%
South Staffs Water (2022 base sample: 29)	78.3%	<p>81% 81% 85% 87% 81% 75% 82% 84% 67% 66%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-1%
SES Water (2022 base sample: 32)	76.0%	<p>84% 94% 83% 76% 72% 78% 67% 78% 58% 78%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	+20%

1.8 Satisfaction with general 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 20 below shows national figures for the last eight years. This is followed by company level figures in Table 15 and Table 16.

Figure 20: Satisfaction with general customer service



★ Significant difference between 2022-2023 data in England and in Total

Table 15: Satisfaction with general customer service – WaSCs

Satisfaction with general customer service	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	78.9%		↓	n/a	-5%
Total WaSCs (2023 base sample: 3,417)	79.1%		↓	73%	-5%
Anglian Water (2023 base sample: 200)	80.2%		↔	↑	+2%

Satisfaction with general customer service	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
Dŵr Cymru Welsh Water (2023 base sample: 400)	83.0%	<table border="1"> <caption>Eight-year company trend for Dŵr Cymru Welsh Water</caption> <thead> <tr> <th>Year</th> <th>Satisfaction (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>89%</td></tr> <tr><td>17</td><td>86%</td></tr> <tr><td>18</td><td>87%</td></tr> <tr><td>19</td><td>80%</td></tr> <tr><td>20</td><td>85%</td></tr> <tr><td>21</td><td>81%</td></tr> <tr><td>22</td><td>79%</td></tr> <tr><td>23</td><td>76%</td></tr> </tbody> </table>	Year	Satisfaction (%)	16	89%	17	86%	18	87%	19	80%	20	85%	21	81%	22	79%	23	76%	↓	↔	-3%
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Northumbrian Water (2023 base sample: 201)	82.3%	<table border="1"> <caption>Eight-year company trend for Northumbrian Water</caption> <thead> <tr> <th>Year</th> <th>Satisfaction (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>86%</td></tr> <tr><td>17</td><td>84%</td></tr> <tr><td>18</td><td>82%</td></tr> <tr><td>19</td><td>79%</td></tr> <tr><td>20</td><td>83%</td></tr> <tr><td>21</td><td>87%</td></tr> <tr><td>22</td><td>84%</td></tr> <tr><td>23</td><td>73%</td></tr> </tbody> </table>	Year	Satisfaction (%)	16	86%	17	84%	18	82%	19	79%	20	83%	21	87%	22	84%	23	73%	↔	↔	-10%
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United Utilities (2023 base sample: 700)	80.2%	<table border="1"> <caption>Eight-year company trend for United Utilities</caption> <thead> <tr> <th>Year</th> <th>Satisfaction (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>80%</td></tr> <tr><td>17</td><td>79%</td></tr> <tr><td>18</td><td>85%</td></tr> <tr><td>19</td><td>80%</td></tr> <tr><td>20</td><td>83%</td></tr> <tr><td>21</td><td>78%</td></tr> <tr><td>22</td><td>81%</td></tr> <tr><td>23</td><td>75%</td></tr> </tbody> </table>	Year	Satisfaction (%)	16	80%	17	79%	18	85%	19	80%	20	83%	21	78%	22	81%	23	75%	↔	↔	-6%
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22	81%																						
23	75%																						
Wessex Water (2023 base sample: 200)	83.9%	<table border="1"> <caption>Eight-year company trend for Wessex Water</caption> <thead> <tr> <th>Year</th> <th>Satisfaction (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>87%</td></tr> <tr><td>17</td><td>85%</td></tr> <tr><td>18</td><td>84%</td></tr> <tr><td>19</td><td>85%</td></tr> <tr><td>20</td><td>85%</td></tr> <tr><td>21</td><td>83%</td></tr> <tr><td>22</td><td>81%</td></tr> <tr><td>23</td><td>81%</td></tr> </tbody> </table>	Year	Satisfaction (%)	16	87%	17	85%	18	84%	19	85%	20	85%	21	83%	22	81%	23	81%	↓	↑	-1%
Year	Satisfaction (%)																						
16	87%																						
17	85%																						
18	84%																						
19	85%																						
20	85%																						
21	83%																						
22	81%																						
23	81%																						
Yorkshire Water (2023 base sample: 400)	81.4%	<table border="1"> <caption>Eight-year company trend for Yorkshire Water</caption> <thead> <tr> <th>Year</th> <th>Satisfaction (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>85%</td></tr> <tr><td>17</td><td>80%</td></tr> <tr><td>18</td><td>86%</td></tr> <tr><td>19</td><td>85%</td></tr> <tr><td>20</td><td>81%</td></tr> <tr><td>21</td><td>80%</td></tr> <tr><td>22</td><td>79%</td></tr> <tr><td>23</td><td>76%</td></tr> </tbody> </table>	Year	Satisfaction (%)	16	85%	17	80%	18	86%	19	85%	20	81%	21	80%	22	79%	23	76%	↓	↔	-3%
Year	Satisfaction (%)																						
16	85%																						
17	80%																						
18	86%																						
19	85%																						
20	81%																						
21	80%																						
22	79%																						
23	76%																						

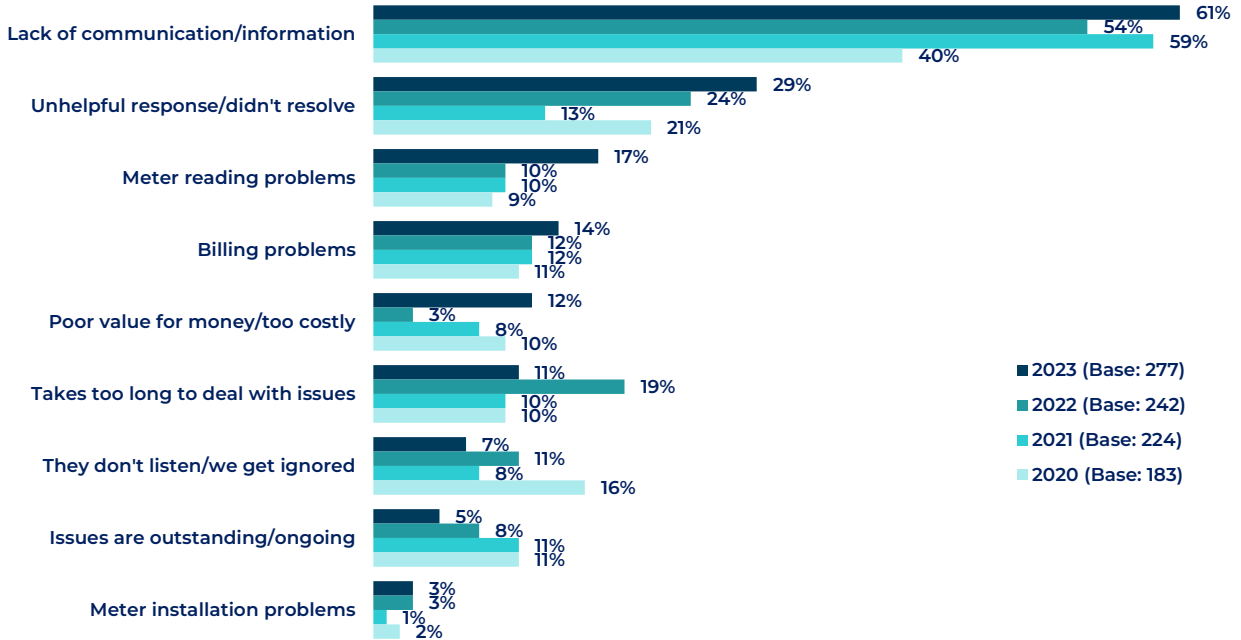
Table 16: Satisfaction with overall customer service – WoCs

Satisfaction with overall customer service	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
Industry (2023 base sample: 4,952)	78.9%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>82%</td><td>80%</td><td>83%</td><td>79%</td><td>80%</td><td>78%</td><td>77%</td><td>73%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	82%	80%	83%	79%	80%	78%	77%	73%	↓	n/a	-5%
Year	16	17	18	19	20	21	22	23															
Satisfaction	82%	80%	83%	79%	80%	78%	77%	73%															
Total WoCs (2023 base sample: 1,535)	78.3%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>78%</td><td>81%</td><td>82%</td><td>81%</td><td>82%</td><td>78%</td><td>75%</td><td>71%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	78%	81%	82%	81%	82%	78%	75%	71%	↔	71%	-4%
Year	16	17	18	19	20	21	22	23															
Satisfaction	78%	81%	82%	81%	82%	78%	75%	71%															
Affinity Water (2023 base sample: 250)	76.7%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>73%</td><td>78%</td><td>79%</td><td>83%</td><td>80%</td><td>76%</td><td>73%</td><td>72%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	73%	78%	79%	83%	80%	76%	73%	72%	↔	↔	-1%
Year	16	17	18	19	20	21	22	23															
Satisfaction	73%	78%	79%	83%	80%	76%	73%	72%															
Bristol Water (2023 base sample: 300)	84.0%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>80%</td><td>85%</td><td>87%</td><td>83%</td><td>87%</td><td>84%</td><td>85%</td><td>81%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	80%	85%	87%	83%	87%	84%	85%	81%	↔	↑	-4%
Year	16	17	18	19	20	21	22	23															
Satisfaction	80%	85%	87%	83%	87%	84%	85%	81%															
Cambridge Water (2023 base sample: 151)	79.8%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>83%</td><td>81%</td><td>83%</td><td>85%</td><td>83%</td><td>75%</td><td>81%</td><td>67%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	83%	81%	83%	85%	83%	75%	81%	67%	↔	↔	-13%
Year	16	17	18	19	20	21	22	23															
Satisfaction	83%	81%	83%	85%	83%	75%	81%	67%															
Essex & Suffolk Water (2023 base sample: 150)	80.0%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>80%</td><td>78%</td><td>81%</td><td>83%</td><td>84%</td><td>81%</td><td>77%</td><td>76%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	80%	78%	81%	83%	84%	81%	77%	76%	↔	↔	0%
Year	16	17	18	19	20	21	22	23															
Satisfaction	80%	78%	81%	83%	84%	81%	77%	76%															
Portsmouth Water (2023 base sample: 150)	80.8%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>82%</td><td>88%</td><td>88%</td><td>80%</td><td>85%</td><td>76%</td><td>76%</td><td>73%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	82%	88%	88%	80%	85%	76%	76%	73%	↓	↔	-3%
Year	16	17	18	19	20	21	22	23															
Satisfaction	82%	88%	88%	80%	85%	76%	76%	73%															
South East Water (2023 base sample: 150)	75.6%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>77%</td><td>80%</td><td>82%</td><td>76%</td><td>81%</td><td>76%</td><td>70%</td><td>64%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	77%	80%	82%	76%	81%	76%	70%	64%	↔	↓	-6%
Year	16	17	18	19	20	21	22	23															
Satisfaction	77%	80%	82%	76%	81%	76%	70%	64%															
South Staffs Water (2023 base sample: 150)	76.2%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>81%</td><td>85%</td><td>83%</td><td>73%</td><td>78%</td><td>75%</td><td>72%</td><td>63%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	81%	85%	83%	73%	78%	75%	72%	63%	↓	↓	-8%
Year	16	17	18	19	20	21	22	23															
Satisfaction	81%	85%	83%	73%	78%	75%	72%	63%															
SES Water (2023 base sample: 150)	75.9%	<table border="1"> <tr><th>Year</th><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>74%</td><td>78%</td><td>77%</td><td>82%</td><td>78%</td><td>75%</td><td>75%</td><td>70%</td></tr> </table>	Year	16	17	18	19	20	21	22	23	Satisfaction	74%	78%	77%	82%	78%	75%	75%	70%	↔	↔	-5%
Year	16	17	18	19	20	21	22	23															
Satisfaction	74%	78%	77%	82%	78%	75%	75%	70%															

1.9 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. The figures for the past three years are shown in Figure 21 below.

Figure 21: Reasons for dissatisfaction with customer services

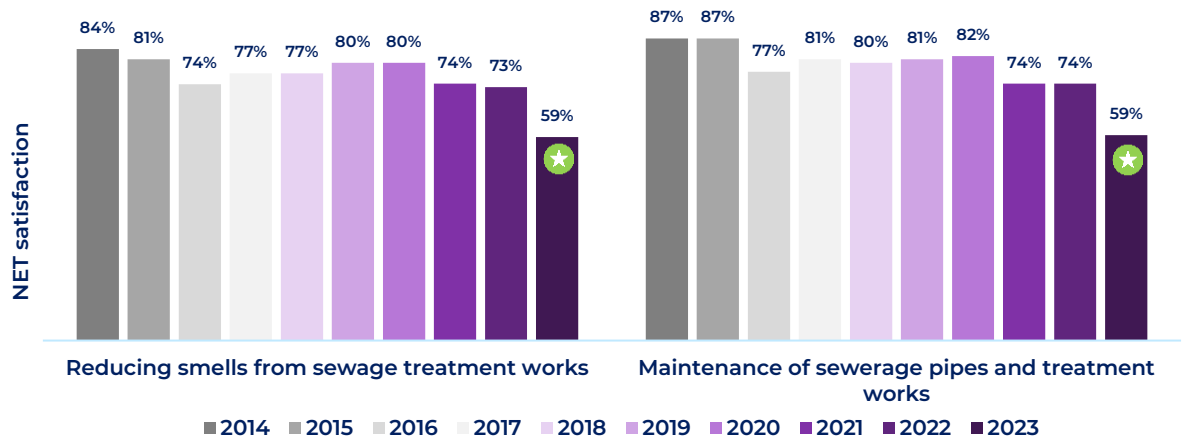


1.10 Satisfaction with aspects of sewerage service

Figure 22 and Figure 23 shows the national trends for satisfaction with the four key aspects of sewerage service. This is followed by Figure 24 which compares satisfaction between England and Wales in 2023, Tables 17 and 18 which show satisfaction in 2023 for each WaSC and WoC respectively, and finally Table 19 and Table 20 which highlight the ten-year trends for WaSCs and WoCs.

Figure 22: Satisfaction with aspects of sewerage service (1)

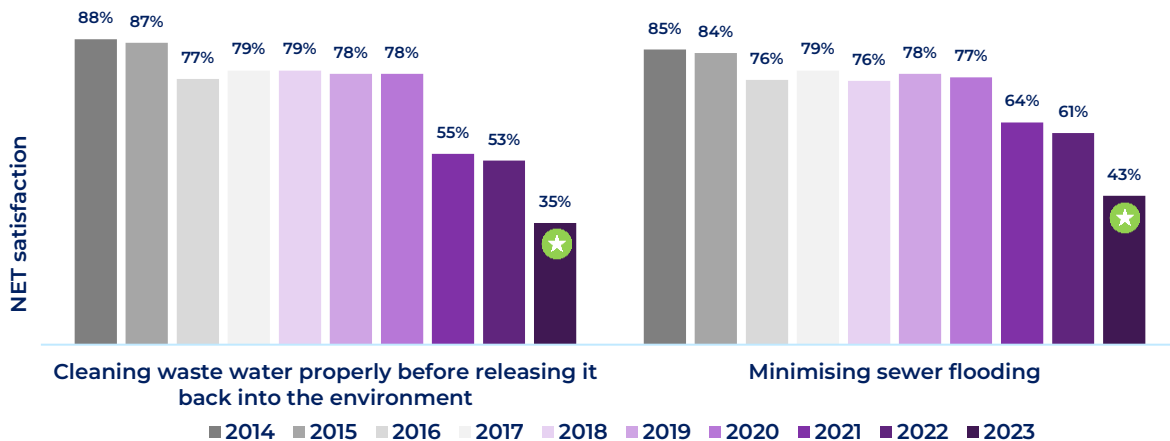
10-year rolling avg. 2014 – 2023	75.6%	78.1%
Change since last year	-15%	-15%
10-year trend	↓	↓



★ Significant difference between 2022-2023 data for Reducing smells from sewage treatment works and Maintenance of sewerage pipes and treatment works

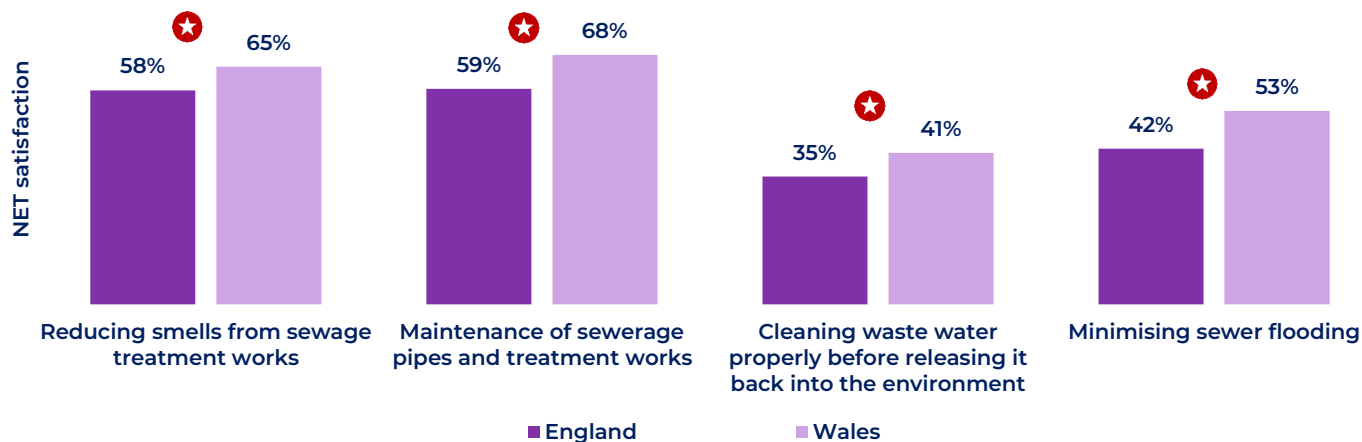
Figure 23: Satisfaction with aspects of sewerage service (2)

10-year rolling avg. 2014 – 2023	69.9%	71.6%
Change since last year	-18%	-18%
10-year trend	↓	↓



★ Significant difference between 2022-2023 data for Cleaning waste water properly and Minimising sewer flooding

Figure 24: Satisfaction with aspects of sewerage service by nation



★ Significant difference between England & Wales 2023 for Reducing smells, Maintenance of sewerage pipes, Cleaning waste water and Minimising sewer flooding

Table 17: Satisfaction with aspects of sewerage service in 2023 – WaSCs

Satisfaction with aspects of sewerage (2023 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 (2023 base sample: 4,952)	59%	59%	35%	43%
Total WaSCs (2023 base sample: 3,417)	60%	61%	36%	44%
Anglian Water (2023 base sample: 200)	58%	58%	37%	41%
Dŵr Cymru Welsh Water (2023 base sample: 400)	65%	69%	41%	53%
Hafren Dyfrdwy (2023 base sample: 200)	64%	63%	46%	53%
Northumbrian Water (2023 base sample: 201)	63%	69%	46%	54%
Severn Trent (2023 base sample: 200)	62%	58%	38%	45%
South West Water (2023 base sample: 400)	52%	54%	24%	34%
Southern Water (2023 base sample: 400)	46%	42%	18%	29%
Thames Water (2023 base sample: 200)	61%	62%	39%	43%
United Utilities (2023 base sample: 700)	60%	63%	34%	45%
Wessex Water (2023 base sample: 200)	59%	60%	35%	44%
Yorkshire Water (2023 base sample: 400)	59%	65%	40%	49%

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

Table 18: Satisfaction with aspects of sewerage service in 2023 – WoCs

Satisfaction with aspects of sewerage (2023 data only) ¹⁸	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2023 base sample: 4,952)	59%	59%	35%	43%
Total WoCs (2023 base sample: 1,535)	55%	53%	30%	37%
Affinity Water (2023 base sample: 250)	59%	53%	31%	38%
Bristol Water (2023 base sample: 300)	57%	61%	31%	38%
Cambridge Water (2023 base sample: 151)	62%	57%	17%	33%
Essex & Suffolk Water (2023 base sample: 150)	65%	65%	45%	44%

¹⁸ Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for

Satisfaction with aspects of sewerage (2023 data only) ¹⁸	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Portsmouth Water (2023 base sample: 150)	31%	32%	11%	15%
South East Water (2023 base sample: 150)	44%	42%	18%	29%
South Staffs Water (2023 base sample: 150)	61%	64%	42%	55%
SES Water (2023 base sample: 150)	54%	51%	27%	32%

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, Essex & Suffolk Water’s sewerage services are provided by Anglian Water or Thames Water.

Table 19: Satisfaction with aspects of sewerage service – WaSC ten-year trends (arrows) and ten-year rolling averages (figures)

Satisfaction with aspects of sewerage (Ten-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 (2023 base sample: 4,952)	75.6% ↓	78.1% ↓	69.9% ↓	71.6% ↓
Total WaSCs (2023 base sample: 3,417)	76.1% ↓	78.8% ↓	71.0% ↓	72.5% ↓
Anglian Water (2023 base sample: 200)	75.2% ↓	78.3% ↓	71.3% ↓	73.3% ↓
Dŵr Cymru Welsh Water (2023 base sample: 400)	80.7% ↓	83.2% ↓	75.3% ↓	77.4% ↓
Hafren Dyfrdwy (2023 base sample: 200)	79.7% ↓	80.2% ↓	70.9% ↓	74.5% ↓
Northumbrian Water (2023 base sample: 201)	81.2% ↓	84.2% ↓	77.6% ↓	79.3% ↓
Severn Trent (2023 base sample: 200)	80.1% ↔	81.0% ↓	75.8% ↓	75.7% ↓
South West Water (2023 base sample: 400)	72.9% ↔	74.6% ↓	62.2% ↓	64.0% ↓
Southern Water (2023 base sample: 400)	70.3% ↓	71.2% ↓	58.7% ↓	64.3% ↓
Thames Water (2023 base sample: 200)	70.4% ↓	73.0% ↓	63.3% ↓	66.0% ↓
United Utilities (2023 base sample: 700)	76.3% ↓	80.7% ↓	73.8% ↓	73.8% ↓
Wessex Water (2023 base sample: 200)	77.8% ↓	80.8% ↓	71.6% ↓	74.1% ↓
Yorkshire Water (2023 base sample: 400)	77.4% ↔	81.2% ↓	73.8% ↓	75.0% ↓

Table 20: Satisfaction with aspects of sewerage service – WoC ten-year trends (arrows) and ten-year rolling averages (figures)

Satisfaction with aspects of sewerage (Ten-year trend data) ¹⁹	Reducing smells from sewage treatment works	Maintenance of sewerage pipes and treatment works	Cleaning wastewater properly before releasing back	Minimising sewer flooding
Industry (2023 base sample: 4,952)	75.6% ↓	78.1% ↓	69.9% ↓	71.6% ↓
Total WoCs (2023 base sample: 1,535)	73.7% ↓	75.2% ↓	65.5% ↓	68.0% ↓
Affinity Water (2023 base sample: 250)	74.8% ↓	75.2% ↓	65.4% ↓	67.2% ↓
Bristol Water (2023 base sample: 300)	78.4% ↔	81.8% ↔	69.7% ↓	74.5% ↓
Cambridge Water (2023 base sample: 151)	73.7% ↓	77.2% ↓	67.7% ↓	68.6% ↓
Essex & Suffolk Water (2023 base sample: 150)	72.2% ↔	76.3% ↓	67.1% ↓	68.7% ↓
Portsmouth Water (2023 base sample: 150)	65.9% ↓	68.2% ↓	52.5% ↓	59.5% ↓
South East Water (2023 base sample: 150)	71.1% ↓	70.0% ↓	59.6% ↓	63.4% ↓
South Staffs Water (2023 base sample: 150)	78.8% ↓	79.9% ↓	74.8% ↓	74.8% ↓
SES Water (2023 base sample: 150)	69.4% ↔	70.8% ↓	60.6% ↓	61.3% ↓

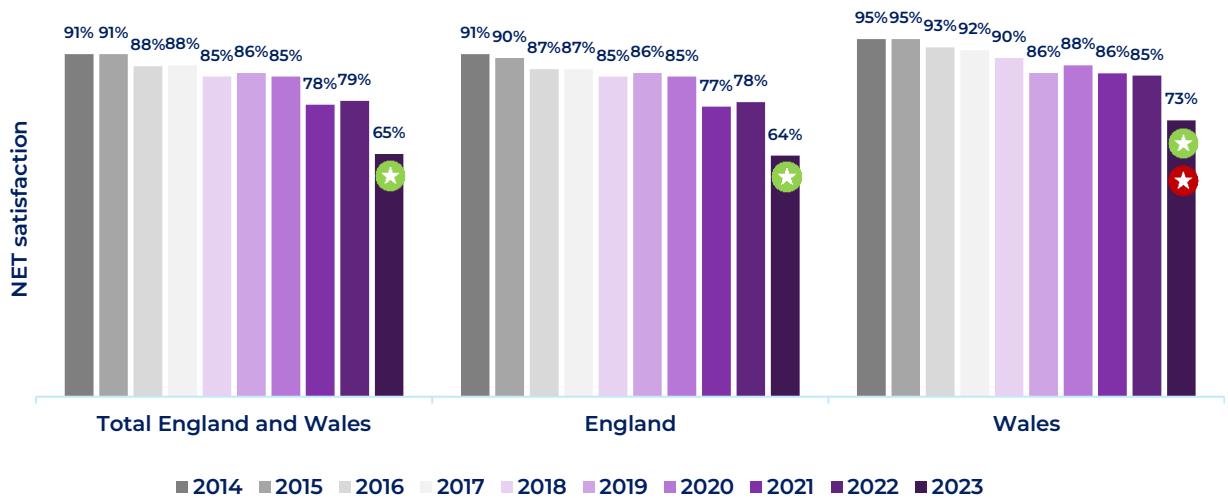
¹⁹ Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for

1.11 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 25 shows ten-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed by Table 21 and Table 22 which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 25: Overall satisfaction with sewerage service

10-year rolling avg. 2014 – 2023	83.4%	83.1%	88.4%
Change since last year	-14%	-14%	-12%
10-year trend	↓	↓	↓



★ Significant difference between 2022-2023 data in England, in Wales and in Total

★ Significant difference between England & Wales 2023

Table 21: Overall satisfaction with sewerage service – WaSCs

Satisfaction with sewerage service	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	83.4%		↓	n/a	-14%
Total WaSCs (2023 base sample: 3,417)	83.9%		↓	66%	-14%
Anglian Water (2023 base sample: 200)	84.9%		↓	↑	-13%

Satisfaction with sewerage service	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Dŵr Cymru Welsh Water (2023 base sample: 400)	88.4%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>95%</td><td>96%</td><td>93%</td><td>92%</td><td>90%</td><td>85%</td><td>88%</td><td>86%</td><td>85%</td><td>74%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	95%	96%	93%	92%	90%	85%	88%	86%	85%	74%	↓	↑	-12%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	95%	96%	93%	92%	90%	85%	88%	86%	85%	74%																	
Hafren Dyfrdwy (2023 base sample: 200)	84.6%	<table border="1"> <tr><th>Year</th><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>90%</td><td>89%</td><td>88%</td><td>84%</td><td>87%</td><td>70%</td></tr> </table>	Year	18	19	20	21	22	23	Satisfaction	90%	89%	88%	84%	87%	70%	↓	↔	-16%								
Year	18	19	20	21	22	23																					
Satisfaction	90%	89%	88%	84%	87%	70%																					
Northumbrian Water (2023 base sample: 201)	87.2%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>90%</td><td>92%</td><td>92%</td><td>92%</td><td>90%</td><td>91%</td><td>89%</td><td>84%</td><td>82%</td><td>70%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	90%	92%	92%	92%	90%	91%	89%	84%	82%	70%	↓	↔	-13%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	90%	92%	92%	92%	90%	91%	89%	84%	82%	70%																	
Severn Trent (2023 base sample: 200)	86.5%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>92%</td><td>93%</td><td>89%</td><td>86%</td><td>88%</td><td>91%</td><td>90%</td><td>86%</td><td>83%</td><td>66%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	92%	93%	89%	86%	88%	91%	90%	86%	83%	66%	↓	↔	-17%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	92%	93%	89%	86%	88%	91%	90%	86%	83%	66%																	
South West Water (2023 base sample: 400)	77.6%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>89%</td><td>85%</td><td>81%</td><td>82%</td><td>77%</td><td>85%</td><td>84%</td><td>79%</td><td>71%</td><td>52%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	89%	85%	81%	82%	77%	85%	84%	79%	71%	52%	↓	↓	-18%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	89%	85%	81%	82%	77%	85%	84%	79%	71%	52%																	
Southern Water (2023 base sample: 400)	76.4%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>91%</td><td>85%</td><td>89%</td><td>83%</td><td>86%</td><td>83%</td><td>81%</td><td>63%</td><td>62%</td><td>45%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	91%	85%	89%	83%	86%	83%	81%	63%	62%	45%	↓	↓	-16%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	91%	85%	89%	83%	86%	83%	81%	63%	62%	45%																	
Thames Water (2023 base sample: 200)	78.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>88%</td><td>86%</td><td>83%</td><td>84%</td><td>76%</td><td>79%</td><td>78%</td><td>66%</td><td>74%</td><td>65%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	88%	86%	83%	84%	76%	79%	78%	66%	74%	65%	↓	↔	-9%
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Year	14	15	16	17	18	19	20	21	22	23																	
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Yorkshire Water (2023 base sample: 400)	86.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction</th><td>91%</td><td>92%</td><td>91%</td><td>89%</td><td>88%</td><td>90%</td><td>85%</td><td>84%</td><td>83%</td><td>66%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Satisfaction	91%	92%	91%	89%	88%	90%	85%	84%	83%	66%	↓	↔	-16%
Year	14	15	16	17	18	19	20	21	22	23																	
Satisfaction	91%	92%	91%	89%	88%	90%	85%	84%	83%	66%																	

Table 22: Overall satisfaction with sewerage service – WoCs

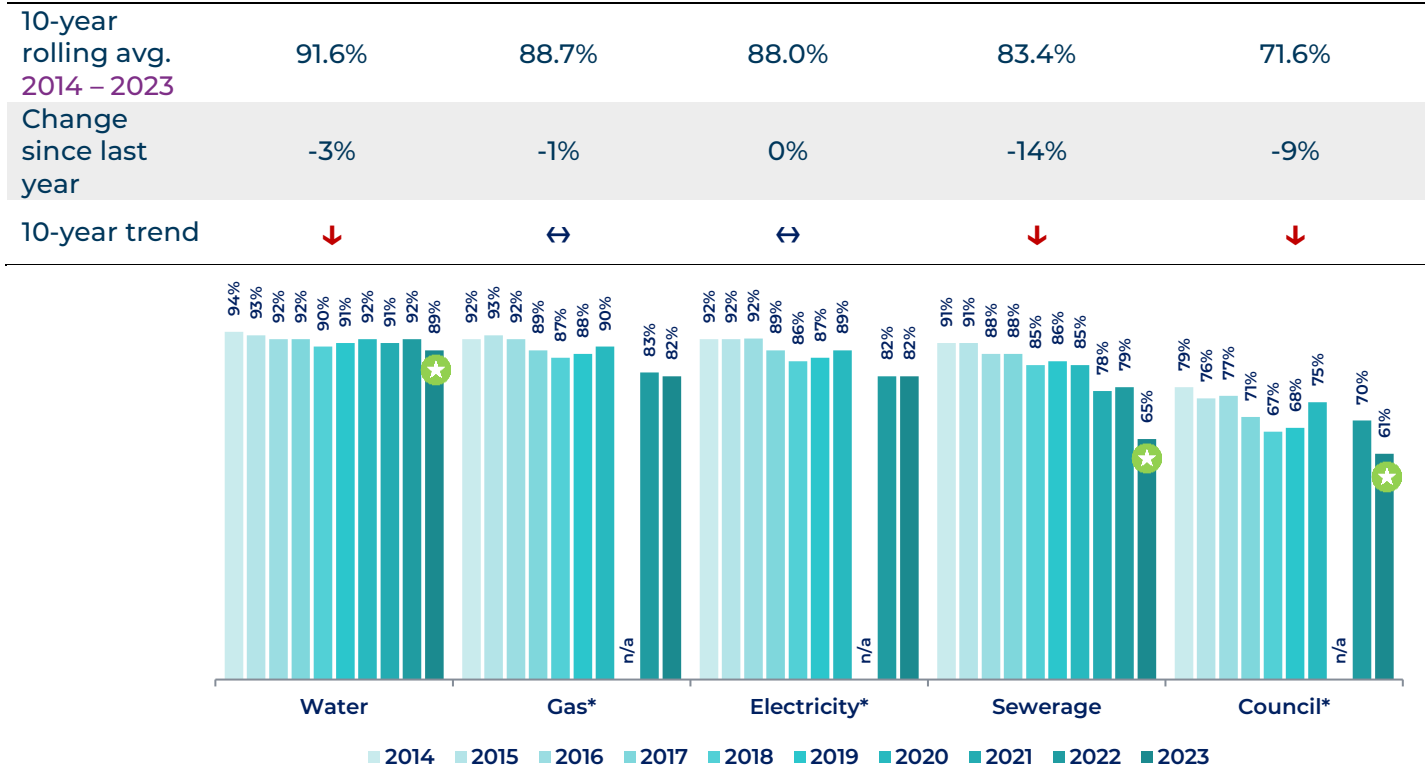
Satisfaction with sewerage service ²⁰	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	83.4%	<p>91% 91% 88% 88% 85% 86% 85% 78% 79% 65%</p> <p>Year</p>	↓	n/a	-14%
Total WoCs (2023 base sample: 1,535)	81.4%	<p>91% 91% 85% 88% 86% 86% 85% 71% 73% 60%</p> <p>Year</p>	↓	60%	-13%
Affinity Water (2023 base sample: 250)	81.3%	<p>89% 89% 85% 87% 87% 87% 82% 72% 73% 62%</p> <p>Year</p>	↓	↔	-11%
Bristol Water (2023 base sample: 300)	86.2%	<p>92% 91% 85% 93% 91% 92% 91% 79% 82% 65%</p> <p>Year</p>	↓	↔	-17%
Cambridge Water (2023 base sample: 151)	82.7%	<p>94% 87% 88% 90% 88% 87% 86% 74% 76% 61%</p> <p>Year</p>	↓	↔	-15%
Essex & Suffolk Water (2023 base sample: 150)	82.4%	<p>86% 91% 83% 84% 86% 87% 88% 74% 77% 68%</p> <p>Year</p>	↔	↔	-9%
Portsmouth Water (2023 base sample: 150)	72.4%	<p>91% 88% 90% 84% 80% 80% 78% 54% 48% 33%</p> <p>Year</p>	↓	↓	-14%
South East Water (2023 base sample: 150)	77.0%	<p>92% 91% 81% 89% 82% 80% 81% 62% 63% 49%</p> <p>Year</p>	↓	↓	-14%
South Staffs Water (2023 base sample: 150)	86.6%	<p>90% 92% 89% 94% 87% 90% 93% 77% 82% 72%</p> <p>Year</p>	↓	↑	-11%
SES Water (2023 base sample: 150)	78.9%	<p>92% 92% 82% 84% 78% 82% 81% 70% 76% 53%</p> <p>Year</p>	↓	↔	-23%

²⁰ Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for

1.12 Overall satisfaction with household services

Customers were asked to think about their satisfaction with the household services they receive²¹. Results are shown in Figure 26 below and compares overall satisfaction with water and sewerage services.

Figure 26: Overall satisfaction with household services



* Significant difference for net satisfied for Water, Sewerage and Council between 2022-2023

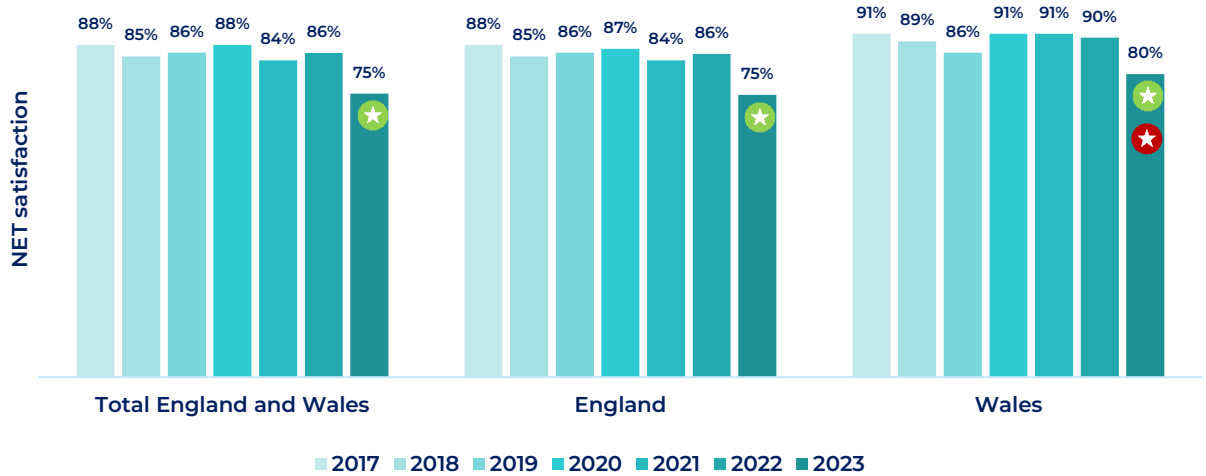
²¹ Question wasn't included in the 2021 survey, so comparisons and trends are based on 9 years

1.13 Overall experience

Overall experience is measured via a 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 2017-2023 is shown in Figure 27. This is followed by Table 23 and Table 24 which show satisfaction for WaSCs and for WoCs in turn.

Figure 27: Satisfaction with overall experience of water/sewerage service provider

7-year rolling avg. 2017 – 2023	84.6%	84.4%	88.4%
Change since last year	-11%	-11%	-10%
7-year trend	↓	↓	↔



- ★ Significant difference for net satisfied between 2022-2023 data in England, in Wales and in Total
- ★ Significant difference between England & Wales 2023

Table 23: Satisfaction with overall experience of water/sewerage service provider – WaSCs

Satisfaction with overall experience	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company Average vs WaSC Average	Change Since Last Year
Industry (2023 base sample: 4,952)	84.6%	<p>88% 85% 86% 88% 84% 86% 75%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-11%
Total WaSCs (2023 base sample: 3,417)	84.4%	<p>88% 85% 86% 87% 84% 86% 75%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↓	75%	-11%
Anglian Water (2023 base sample: 200)	85.7%	<p>90% 85% 84% 87% 86% 87% 81%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-6%
Dŵr Cymru Welsh Water (2023 base sample: 400)	88.4%	<p>91% 90% 86% 91% 91% 90% 80%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-10%
Hafren Dyfrdwy (2023 base sample: 200)	86.6%	<p>87% 86% 88% 87% 91% 80%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-11%
Northumbrian Water (2023 base sample: 201)	90.2%	<p>90% 90% 91% 94% 88% 95% 83%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-12%
Severn Trent (2023 base sample: 200)	86.8%	<p>89% 87% 88% 88% 88% 88% 81%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-7%
South West Water (2023 base sample: 400)	79.1%	<p>85% 78% 80% 85% 83% 80% 65%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-15%
Southern Water (2023 base sample: 400)	75.7%	<p>79% 79% 84% 81% 72% 73% 62%</p> <p>17 18 19 20 21 22 23</p> <p>Year</p>	↓	↓	-11%

Satisfaction with overall experience	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company Average vs WaSC Average	Change Since Last Year																
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Year	17	18	19	20	21	22	23														
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Year	17	18	19	20	21	22	23														
Satisfaction (%)	91	88	92	89	86	89	76														

Table 24: Satisfaction with overall experience of water/sewerage service provider – WoCs

Satisfaction with overall experience	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company Average vs WaSC Average	Change Since Last Year																
Industry (2023 base sample: 4,952)	84.6%	<table border="1"> <tr><th>Year</th><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction (%)</th><td>88</td><td>85</td><td>86</td><td>88</td><td>84</td><td>86</td><td>75</td></tr> </table>	Year	17	18	19	20	21	22	23	Satisfaction (%)	88	85	86	88	84	86	75	↓	n/a	-11%
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Satisfaction (%)	88	85	86	88	84	86	75														
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Affinity Water (2023 base sample: 250)	84.1%	<table border="1"> <tr><th>Year</th><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Satisfaction (%)</th><td>84</td><td>85</td><td>85</td><td>87</td><td>86</td><td>86</td><td>76</td></tr> </table>	Year	17	18	19	20	21	22	23	Satisfaction (%)	84	85	85	87	86	86	76	↔	↔	-10%
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Year	17	18	19	20	21	22	23														
Satisfaction (%)	93	92	92	91	90	90	85														

Satisfaction with overall experience	Seven-year rolling company average	Seven-year company trend	Seven-year trend	Company Average vs WaSC Average	Change Since Last Year																
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Chapter 2: Fair and Affordable Bills

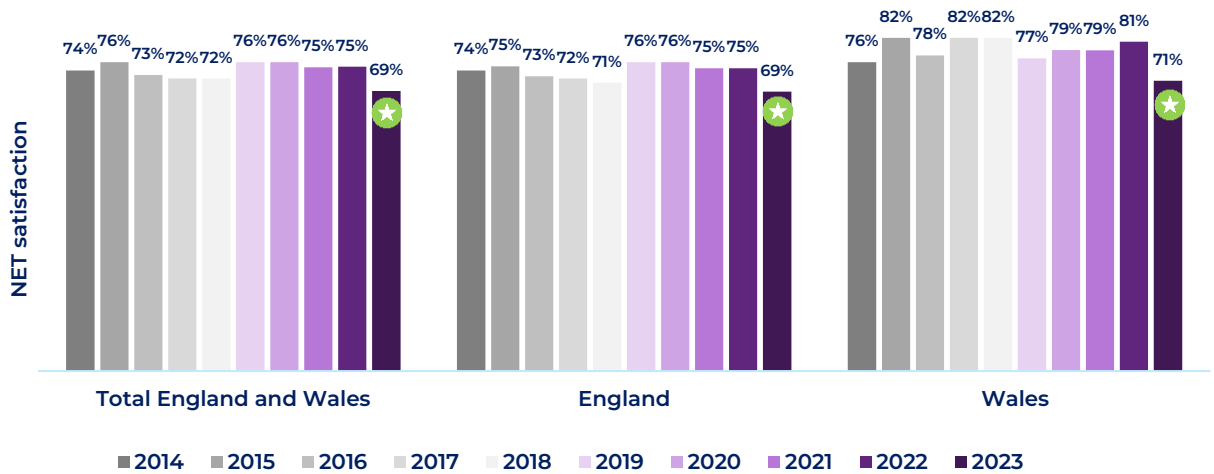
This chapter presents views on the charges paid for water and sewerage services. Topics include fairness, affordability and value for money.

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 28 below, followed by Table 25 and Table 26, which present customers' views for each WaSC and for each WoC respectively.

Figure 28: Satisfaction with value for money of water services

10-year rolling avg. 2014 – 2023	73.7%	73.4%	78.7%
Change since last year	-6%	-6%	-10%
10-year trend	↔	↔	↔



★ Significant difference between 2022-2023 data in England, Wales and in Total

Table 25: Satisfaction with value for money of water services – WaSCs

Satisfaction with value for money of water services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	73.7%	<p>74% 76% 73% 72% 72% 76% 76% 75% 75% 69%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	n/a	-6%
Total WaSCs (2023 base sample: 3,417)	73.9%	<p>74% 75% 74% 72% 72% 76% 77% 76% 75% 69%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	69%	-6%
Anglian Water (2023 base sample: 200)	75.6%	<p>74% 77% 73% 79% 72% 74% 76% 76% 79% 76%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-2%
Dŵr Cymru Welsh Water (2023 base sample: 400)	78.7%	<p>75% 82% 78% 82% 82% 77% 79% 79% 81% 71%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-10%
Hafren Dyfrdwy (2023 base sample: 200)	75.6%	<p>76% 77% 79% 72% 78% 72%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-6%
Northumbrian Water (2023 base sample: 201)	79.3%	<p>77% 77% 84% 78% 75% 79% 79% 81% 86% 77%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-9%
Severn Trent (2023 base sample: 200)	77.3%	<p>77% 75% 78% 72% 78% 78% 84% 80% 76% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-1%
South West Water (2023 base sample: 400)	62.2%	<p>56% 58% 65% 54% 56% 65% 72% 66% 67% 60%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↑	↓	-7%
Southern Water (2023 base sample: 400)	66.1%	<p>70% 66% 72% 61% 62% 67% 70% 66% 67% 61%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-7%
Thames Water (2023 base sample: 200)	69.3%	<p>70% 74% 70% 66% 65% 75% 70% 75% 67% 62%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-5%

Satisfaction with value for money of water services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	73.3%	<p>75% 73% 68% 73% 71% 76% 77% 71% 77% 71%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-5%
Wessex Water (2023 base sample: 200)	75.2%	<p>78% 76% 75% 76% 75% 79% 76% 76% 78% 63%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-15%
Yorkshire Water (2023 base sample: 400)	77.7%	<p>78% 82% 79% 76% 77% 79% 77% 79% 80% 70%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-9%

Table 26: Satisfaction with value for money of water services – WoCs

Satisfaction with value for money of water services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	74.2%	<p>74% 76% 73% 72% 72% 76% 76% 75% 75% 69%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	n/a	-6%
Total WoCs (2023 base sample: 1,535)	73.1%	<p>75% 79% 70% 72% 70% 76% 76% 71% 75% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	68%	-7%
Affinity Water (2023 base sample: 250)	70.9%	<p>74% 78% 69% 64% 65% 77% 72% 69% 75% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-7%
Bristol Water (2023 base sample: 300)	76.0%	<p>70% 82% 62% 77% 75% 80% 84% 77% 80% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↑	↔	-7%
Cambridge Water (2023 base sample: 151)	74.5%	<p>80% 81% 75% 74% 68% 78% 74% 74% 78% 63%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-14%

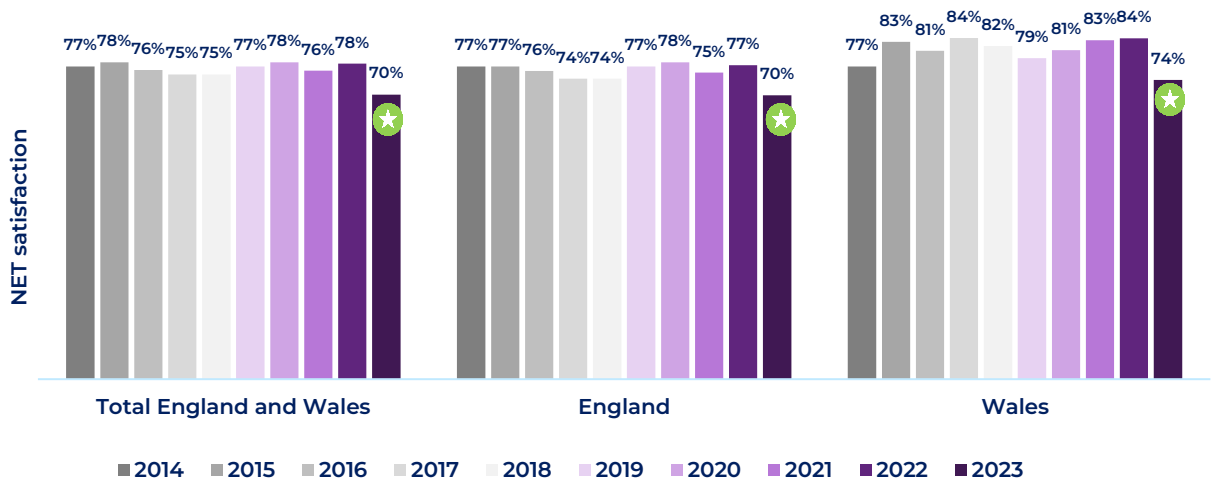
Satisfaction with value for money of water services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year																						
Essex & Suffolk Water (2023 base sample: 150)	72.9%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>75%</td><td>70%</td><td>67%</td><td>71%</td><td>71%</td><td>76%</td><td>77%</td><td>73%</td><td>79%</td><td>69%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Value	75%	70%	67%	71%	71%	76%	77%	73%	79%	69%	↔	↔	-10%
Year	14	15	16	17	18	19	20	21	22	23																	
Value	75%	70%	67%	71%	71%	76%	77%	73%	79%	69%																	
Portsmouth Water (2023 base sample: 150)	78.7%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>79%</td><td>81%</td><td>79%</td><td>79%</td><td>77%</td><td>77%</td><td>82%</td><td>79%</td><td>80%</td><td>74%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Value	79%	81%	79%	79%	77%	77%	82%	79%	80%	74%	↔	↔	-6%
Year	14	15	16	17	18	19	20	21	22	23																	
Value	79%	81%	79%	79%	77%	77%	82%	79%	80%	74%																	
South East Water (2023 base sample: 150)	69.3%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>72%</td><td>83%</td><td>67%</td><td>74%</td><td>69%</td><td>70%</td><td>70%</td><td>66%</td><td>65%</td><td>59%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Value	72%	83%	67%	74%	69%	70%	70%	66%	65%	59%	↓	↓	-6%
Year	14	15	16	17	18	19	20	21	22	23																	
Value	72%	83%	67%	74%	69%	70%	70%	66%	65%	59%																	
South Staffs Water (2023 base sample: 150)	75.6%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>77%</td><td>85%</td><td>74%</td><td>77%</td><td>72%</td><td>76%</td><td>80%</td><td>72%</td><td>77%</td><td>67%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Value	77%	85%	74%	77%	72%	76%	80%	72%	77%	67%	↔	↔	-10%
Year	14	15	16	17	18	19	20	21	22	23																	
Value	77%	85%	74%	77%	72%	76%	80%	72%	77%	67%																	
SES Water (2023 base sample: 150)	72.1%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>73%</td><td>74%</td><td>71%</td><td>69%</td><td>67%</td><td>75%</td><td>73%</td><td>72%</td><td>70%</td><td>76%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Value	73%	74%	71%	69%	67%	75%	73%	72%	70%	76%	↔	↑	+7%
Year	14	15	16	17	18	19	20	21	22	23																	
Value	73%	74%	71%	69%	67%	75%	73%	72%	70%	76%																	

2.2 Value for money of sewerage services

Customers were asked how far they agreed that the sewerage services they receive represent good value for money. National views are shown in Figure 29 below, followed by Table 27 and Table 28, which present customer views by each WaSC and WoC respectively.

Figure 29: Satisfaction with value for money of sewerage services

10-year rolling avg. 2014 – 2023	75.8%	75.5%	80.8%
Change since last year	-8%	-7%	-10%
10-year trend	↔	↔	↔



★ Significant difference between 2022-2023 data in England, Wales and in Total

Table 27: Satisfaction with value for money of sewerage services – WaSCs

Satisfaction with value for money of sewerage services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	75.8%		↔	n/a	-8%
Total WaSCs (2023 base sample: 3,417)	76.6%		↔	71%	-8%
Anglian Water (2023 base sample: 200)	77.4%		↔	↑	-4%

Satisfaction with value for money of sewerage services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Dŵr Cymru Welsh Water (2023 base sample: 400)	80.9%	<p>76% 83% 81% 84% 83% 79% 81% 84% 84% 74%</p> <p>Year</p>	↔	↔	-10%
Hafren Dyfrdwy (2023 base sample: 200)	78.3%	<p>76% 81% 81% 80% 81% 71%</p> <p>Year</p>	↔	↔	-10%
Northumbrian Water (2023 base sample: 201)	80.6%	<p>80% 79% 84% 78% 78% 84% 81% 83% 83% 76%</p> <p>Year</p>	↔	↔	-7%
Severn Trent (2023 base sample: 200)	80.1%	<p>79% 79% 80% 75% 79% 80% 87% 81% 84% 76%</p> <p>Year</p>	↔	↔	-8%
South West Water (2023 base sample: 400)	60.8%	<p>53% 61% 60% 58% 57% 66% 67% 65% 64% 57%</p> <p>Year</p>	↑	↓	-7%
Southern Water (2023 base sample: 400)	67.4%	<p>72% 69% 73% 68% 63% 74% 71% 68% 67% 52%</p> <p>Year</p>	↓	↓	-15%
Thames Water (2023 base sample: 200)	72.4%	<p>76% 76% 78% 69% 70% 75% 72% 70% 72% 67%</p> <p>Year</p>	↓	↔	-5%
United Utilities (2023 base sample: 700)	78.0%	<p>78% 80% 72% 77% 80% 79% 81% 79% 81% 74%</p> <p>Year</p>	↔	↔	-7%
Wessex Water (2023 base sample: 200)	78.4%	<p>79% 81% 80% 78% 79% 83% 79% 75% 79% 70%</p> <p>Year</p>	↓	↔	-9%
Yorkshire Water (2023 base sample: 400)	80.1%	<p>82% 83% 82% 79% 79% 80% 79% 83% 83% 70%</p> <p>Year</p>	↔	↔	-13%

Table 28: Satisfaction with value for money of sewerage services – WoCs

Satisfaction with value for money of sewerage services ²²	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	75.8%	<p>77% 78% 76% 75% 75% 77% 78% 76% 78% 70%</p> <p>Year</p>	↔	n/a	-8%
Total WoCs (2023 base sample: 1,535)	72.8%	<p>75% 76% 72% 73% 72% 75% 76% 70% 72% 67%</p> <p>Year</p>	↓	67%	-5%
Affinity Water (2023 base sample: 250)	71.6%	<p>75% 73% 75% 66% 71% 78% 75% 65% 72% 67%</p> <p>Year</p>	↔	↔	-6%
Bristol Water (2023 base sample: 300)	77.1%	<p>70% 81% 63% 82% 76% 83% 82% 81% 81% 70%</p> <p>Year</p>	↔	↔	-11%
Cambridge Water (2023 base sample: 151)	73.8%	<p>77% 75% 76% 76% 68% 79% 76% 72% 76% 63%</p> <p>Year</p>	↓	↔	-13%
Essex & Suffolk Water (2023 base sample: 150)	72.6%	<p>74% 70% 70% 72% 66% 74% 76% 78% 75% 72%</p> <p>Year</p>	↔	↔	-3%
Portsmouth Water (2023 base sample: 150)	67.6%	<p>77% 73% 74% 74% 69% 65% 81% 60% 57% 47%</p> <p>Year</p>	↓	↓	-10%
South East Water (2023 base sample: 150)	69.9%	<p>73% 78% 65% 74% 73% 69% 71% 66% 67% 63%</p> <p>Year</p>	↓	↔	-4%
South Staffs Water (2023 base sample: 150)	77.8%	<p>80% 83% 75% 82% 76% 75% 83% 73% 80% 70%</p> <p>Year</p>	↓	↔	-10%

²² Satisfaction with sewerage service provided by the WaSC(s) operating in the area that the WoC supplies water for

Satisfaction with value for money of sewerage services ²²	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
SES Water (2023 base sample: 150)	71.3%		↔	↔	+5%

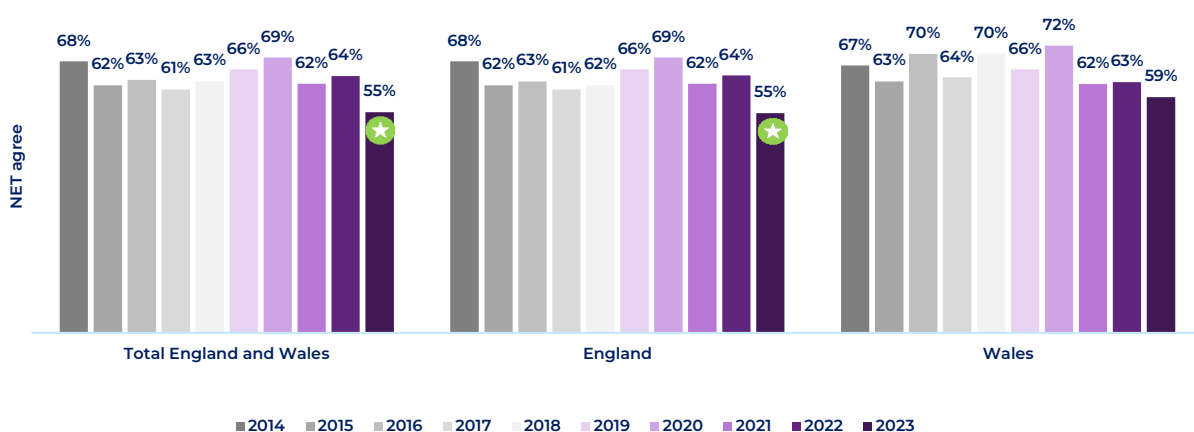
2.3 Fairness of charges

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 30. This is followed by views on fairness by each WaSC in Table 29 and by each WoC in Table 30.

Prior to 2019, fairness of water and sewerage charges was also reported separately for WoCs (fairness of water charges, fairness of sewerage charges, with a third question asking about fairness 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.²³

Figure 30: Fairness of charges

10-year rolling avg. 2014 – 2023	63.4%	63.2%	65.7%
Change since last year	-9%	-9%	-4%
10-year trend	↔	↔	↔



★ Significant difference between 2022-2023 data in England and in Total

Table 29: Fairness of charges – WaSCs

²³ 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.

Agree charges are fair	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	63.4%	<p>68% 62% 63% 61% 63% 66% 69% 62% 64% 55%</p> <p>Year</p>	↔	n/a	-9%
Total WaSCs (2023 base sample: 3,417)	63.6%	<p>68% 62% 64% 61% 63% 66% 69% 63% 65% 55%</p> <p>Year</p>	↔	55%	-9%
Anglian Water (2023 base sample: 200)	66.0%	<p>68% 64% 64% 67% 62% 65% 72% 67% 68% 64%</p> <p>Year</p>	↔	↑	-4%
Dŵr Cymru Welsh Water (2023 base sample: 400)	65.8%	<p>67% 63% 70% 64% 71% 66% 72% 62% 62% 59%</p> <p>Year</p>	↔	↔	-3%
Hafren Dyfrdwy (2023 base sample: 200)	64.0%	<p>61% 63% 71% 62% 69% 58%</p> <p>Year</p>	↔	↔	-10%
Northumbrian Water (2023 base sample: 201)	68.5%	<p>76% 66% 73% 64% 63% 60% 72% 71% 76% 62%</p> <p>Year</p>	↔	↑	-14%
Severn Trent (2023 base sample: 200)	66.7%	<p>69% 64% 69% 58% 68% 69% 77% 68% 67% 58%</p> <p>Year</p>	↔	↔	-9%
South West Water (2023 base sample: 400)	46.4%	<p>46% 39% 46% 39% 38% 50% 57% 51% 53% 42%</p> <p>Year</p>	↔	↓	-10%
Southern Water (2023 base sample: 400)	59.2%	<p>68% 53% 67% 62% 60% 59% 61% 56% 60% 46%</p> <p>Year</p>	↓	↓	-14%
Thames Water (2023 base sample: 200)	60.3%	<p>67% 60% 58% 61% 61% 65% 62% 61% 60% 48%</p> <p>Year</p>	↔	↓	-12%

Agree charges are fair	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	62.4%		↔	↔	-7%
Wessex Water (2023 base sample: 200)	65.6%		↔	↔	-16%
Yorkshire Water (2023 base sample: 400)	68.1%		↔	↔	-8%

Table 30: Fairness of charges - WoCs

Agree charges are fair	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	63.4%		↔	n/a	-9%
Total WoCs (2023 base sample: 1,535)	62.6%		↔	55%	-9%
Affinity Water (2023 base sample: 250)	59.8%		↔	↔	-6%
Bristol Water (2023 base sample: 300)	65.0%		↔	↔	-9%
Cambridge Water (2023 base sample: 151)	66.4%		↔	↔	-20%
Essex & Suffolk Water (2023 base sample: 150)	63.8%		↑	↔	-12%

Agree charges are fair	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Portsmouth Water (2023 base sample: 150)	65.4%		↓	↔	-13%
South East Water (2023 base sample: 150)	59.9%		↓	↔	-8%
South Staffs Water (2023 base sample: 150)	65.5%		↓	↔	-15%
SES Water (2023 base sample: 150)	60.2%		↓	↔	-7%

2.4 Affordability of charges

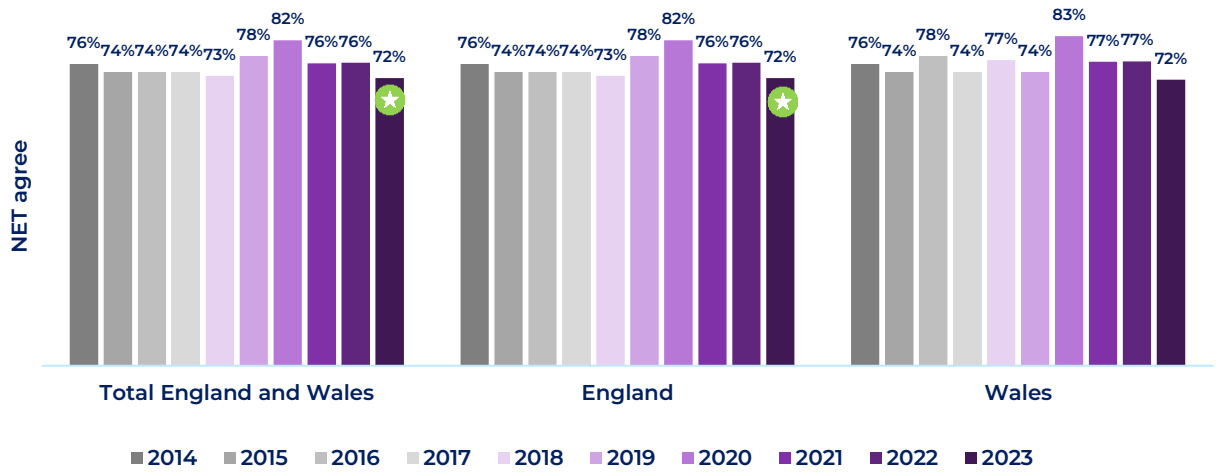
Customers were asked to what extent they agree that the water and/or sewerage charges they pay are affordable. Figure shows ten-year trends for perceptions of affordability at national levels; this is followed by Table 31 and Table 32, which show affordability trends by WaSC and WoC.

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.²⁴

Figure 31: Affordability of water and sewerage charges

10-year rolling avg. 2014 – 2023	75.7%	75.7%	76.0%
Change since last year	-4%	-4%	-5%
10-year trend	↔	↔	↔

²⁴ 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.



★ Significant difference between 2022-2023 data in England and in Total

Table 31: Affordability of water and sewerage charges – WaSCs

Agree charges are affordable	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	75.7%	<p>76% 74% 74% 74% 73% 77% 82% 76% 76% 72%</p> <p>Year</p>	↔	n/a	-4%
Total WaSCs (2023 base sample: 3,417)	75.5%	<p>76% 74% 75% 74% 74% 77% 82% 76% 76% 72%</p> <p>Year</p>	↔	72%	-4%
Anglian Water (2023 base sample: 200)	78.3%	<p>78% 78% 75% 81% 73% 76% 84% 77% 80% 81%</p> <p>Year</p>	↔	↑	+1%
Dŵr Cymru Welsh Water (2023 base sample: 400)	75.9%	<p>75% 73% 78% 74% 77% 74% 83% 77% 77% 72%</p> <p>Year</p>	↔	↔	-5%
Hafren Dyfrdwy (2023 base sample: 200)	75.4%	<p>74% 75% 81% 75% 75% 72%</p> <p>Year</p>	↔	↔	-3%
Northumbrian Water (2023 base sample: 201)	79.5%	<p>84% 74% 83% 81% 75% 74% 85% 81% 85% 73%</p> <p>Year</p>	↔	↔	-12%
Severn Trent (2023 base sample: 200)	77.3%	<p>74% 77% 78% 75% 77% 77% 85% 80% 76% 73%</p> <p>Year</p>	↔	↔	-3%
South West Water (2023 base sample: 400)	64.1%	<p>58% 61% 62% 61% 57% 66% 75% 67% 68% 63%</p> <p>Year</p>	↑	↓	-5%
Southern Water (2023 base sample: 400)	74.2%	<p>79% 68% 77% 71% 70% 78% 82% 72% 74% 72%</p> <p>Year</p>	↔	↔	-2%
Thames Water (2023 base sample: 200)	71.5%	<p>72% 67% 69% 69% 71% 76% 76% 76% 73% 65%</p> <p>Year</p>	↔	↓	-9%

Agree charges are affordable	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	75.9%	<p>78%76%73%73%74%80%83%74%76%73%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-4%
Wessex Water (2023 base sample: 200)	78.4%	<p>80%80%80%78%76%79%87%74%78%72%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-6%
Yorkshire Water (2023 base sample: 400)	78.6%	<p>80%79%77%76%76%83%82%79%77%78%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	0%

Table 32: Affordability of water and sewerage charges – WoCs

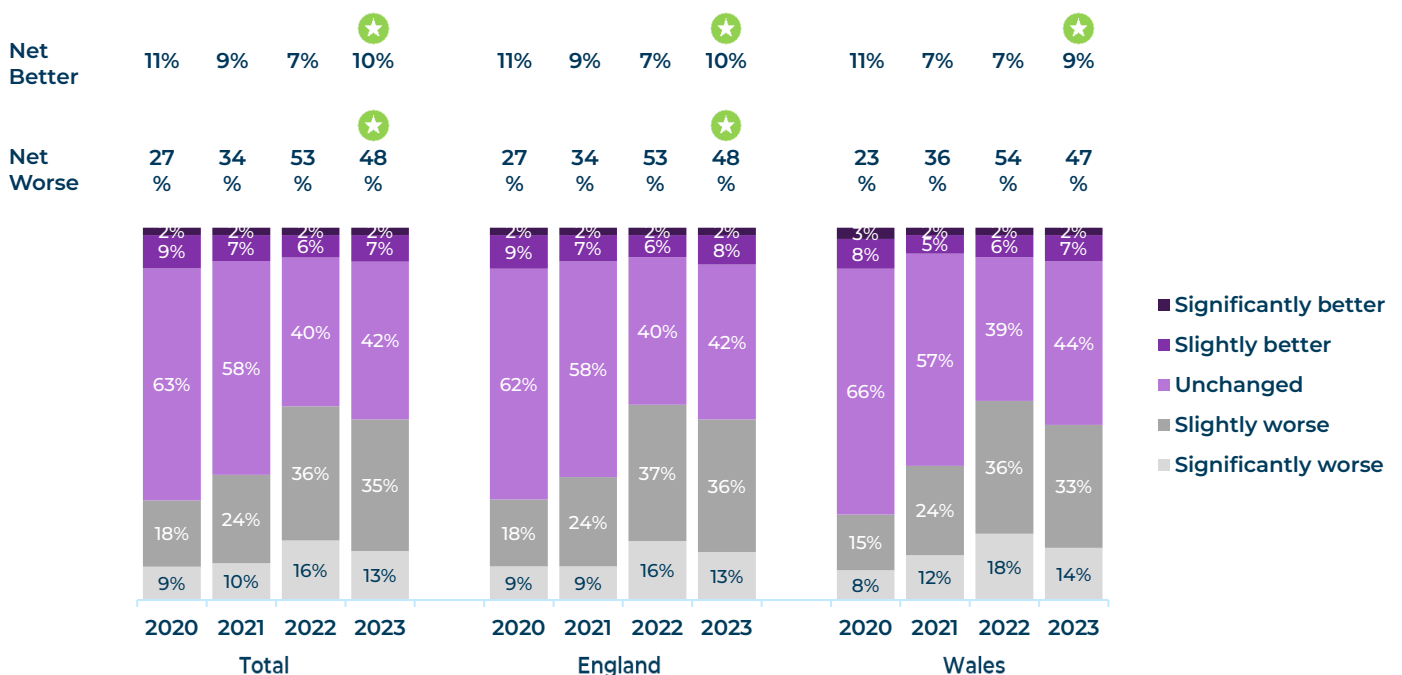
Agree charges are affordable	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	75.7%	<p>76%74%74%74%73%77%82%76%76%72%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	n/a	-4%
Total WoCs (2023 base sample: 1,535)	76.3%	<p>77%77%73%75%71%79%83%75%77%74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	74%	-3%
Affinity Water (2023 base sample: 250)	75.1%	<p>72%75%71%76%65%78%82%74%80%75%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↑	↔	-4%
Bristol Water (2023 base sample: 300)	76.6%	<p>74%74%66%77%78%80%81%79%78%76%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↑	↔	-2%
Cambridge Water (2023 base sample: 151)	81.2%	<p>81%79%79%79%80%84%86%86%88%69%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-20%
Essex & Suffolk Water (2023 base sample: 150)	75.9%	<p>78%73%66%72%69%81%86%77%78%77%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-1%

Agree charges are affordable	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Portsmouth Water (2023 base sample: 150)	77.9%	<p>77% 82% 81% 85% 68% 77% 87% 76% 76% 70%</p>	↔	↔	-5%
South East Water (2023 base sample: 150)	75.9%	<p>80% 78% 74% 67% 75% 78% 82% 76% 74% 74%</p>	↔	↔	0%
South Staffs Water (2023 base sample: 150)	75.4%	<p>79% 85% 75% 79% 72% 75% 83% 70% 70% 65%</p>	↓	↓	-5%
SES Water (2023 base sample: 150)	76.7%	<p>86% 76% 75% 72% 72% 80% 81% 73% 78% 74%</p>	↔	↔	-4%

2.5 Changes in household financial situation

Introduced in 2020, customers were asked a question as to whether their household situation has changed since the previous year. Figure 32 shows results at national levels.

Figure 32: Changes in household financial situation



* Significant difference between 2022-2023 data for Net Better in England, in Wales and in Total and Net Worse in England and in Total

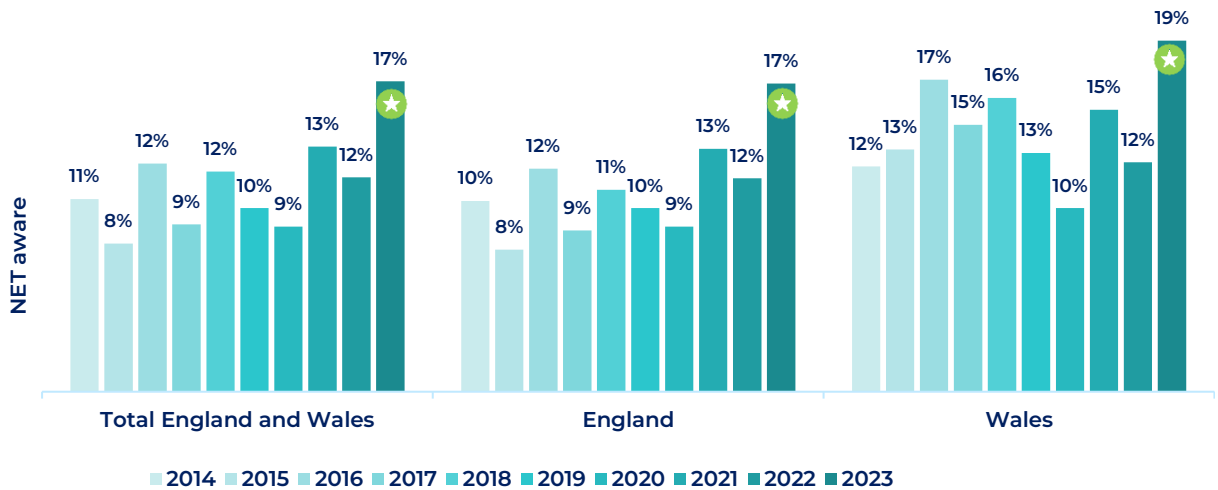
Water companies are obliged to provide financial support schemes specifically designed for low-income customers who struggle to afford their bills. They also offer priority services to customers with specific requirements to ensure accessing services is as easy as possible. This includes the provision 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.

2.6 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 shows awareness and take-up across England and Wales, and for each nation over the last ten years. This is followed by Table 33 and Table 34, which show awareness and take-up for WaSCs and for WoCs respectively.

Figure 33: Awareness of WaterSure/WaterSure Wales

10-year rolling avg. 2014 – 2023	11.0%	10.9%	14.0%
Change since last year	+5%	+5%	+7%
10-year trend	↔	↑	↔



★ Significant difference between 2022-2023 data in England, Wales and in Total

Table 33: Awareness of WaterSure/ WaterSure Wales – WaSCs

Awareness of WaterSure/ WaterSure Wales	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Industry (2023 base sample: 4,952)	11.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>11%</td><td>8%</td><td>12%</td><td>9%</td><td>12%</td><td>10%</td><td>9%</td><td>13%</td><td>12%</td><td>17%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	11%	8%	12%	9%	12%	10%	9%	13%	12%	17%	↔	n/a	+5%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	11%	8%	12%	9%	12%	10%	9%	13%	12%	17%																	
Total WaSCs (2023 base sample: 3,417)	11.2%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>11%</td><td>9%</td><td>13%</td><td>9%</td><td>12%</td><td>10%</td><td>9%</td><td>13%</td><td>12%</td><td>17%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	11%	9%	13%	9%	12%	10%	9%	13%	12%	17%	↑	17%	+5%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	11%	9%	13%	9%	12%	10%	9%	13%	12%	17%																	
Anglian Water (2023 base sample: 200)	14.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>11%</td><td>13%</td><td>17%</td><td>11%</td><td>15%</td><td>11%</td><td>11%</td><td>17%</td><td>17%</td><td>20%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	11%	13%	17%	11%	15%	11%	11%	17%	17%	20%	↑	↔	+3%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	11%	13%	17%	11%	15%	11%	11%	17%	17%	20%																	
Dŵr Cymru Welsh Water (2023 base sample: 400)	14.3%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>13%</td><td>13%</td><td>18%</td><td>15%</td><td>17%</td><td>14%</td><td>10%</td><td>15%</td><td>13%</td><td>20%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	13%	13%	18%	15%	17%	14%	10%	15%	13%	20%	↔	↔	+7%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	13%	13%	18%	15%	17%	14%	10%	15%	13%	20%																	
Hafren Dyfrdwy (2023 base sample: 200)	12.3%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>11%</td><td>12%</td><td>13%</td><td>16%</td><td>9%</td><td>14%</td><td></td><td></td><td></td><td></td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	11%	12%	13%	16%	9%	14%					↔	↔	+5%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	11%	12%	13%	16%	9%	14%																					
Northumbrian Water (2023 base sample: 201)	9.3%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>11%</td><td>9%</td><td>12%</td><td>6%</td><td>8%</td><td>10%</td><td>6%</td><td>11%</td><td>9%</td><td>14%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	11%	9%	12%	6%	8%	10%	6%	11%	9%	14%	↔	↔	+5%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	11%	9%	12%	6%	8%	10%	6%	11%	9%	14%																	
Severn Trent (2023 base sample: 200)	9.7%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>9%</td><td>7%</td><td>10%</td><td>7%</td><td>10%</td><td>10%</td><td>7%</td><td>10%</td><td>14%</td><td>16%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	9%	7%	10%	7%	10%	10%	7%	10%	14%	16%	↑	↔	+3%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	9%	7%	10%	7%	10%	10%	7%	10%	14%	16%																	
South West Water (2023 base sample: 400)	17.1%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>18%</td><td>17%</td><td>20%</td><td>18%</td><td>17%</td><td>19%</td><td>15%</td><td>15%</td><td>17%</td><td>20%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	18%	17%	20%	18%	17%	19%	15%	15%	17%	20%	↔	↔	+2%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	18%	17%	20%	18%	17%	19%	15%	15%	17%	20%																	
Southern Water (2023 base sample: 400)	12.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>12%</td><td>10%</td><td>14%</td><td>10%</td><td>14%</td><td>11%</td><td>10%</td><td>13%</td><td>12%</td><td>18%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	12%	10%	14%	10%	14%	11%	10%	13%	12%	18%	↔	↔	+6%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	12%	10%	14%	10%	14%	11%	10%	13%	12%	18%																	
Thames Water (2023 base sample: 200)	12.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness</th><td>10%</td><td>8%</td><td>15%</td><td>9%</td><td>14%</td><td>11%</td><td>10%</td><td>18%</td><td>11%</td><td>18%</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness	10%	8%	15%	9%	14%	11%	10%	18%	11%	18%	↑	↔	+7%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness	10%	8%	15%	9%	14%	11%	10%	18%	11%	18%																	

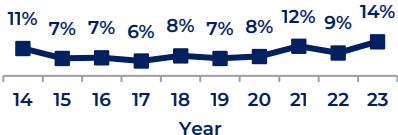
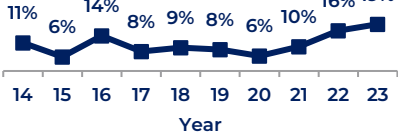
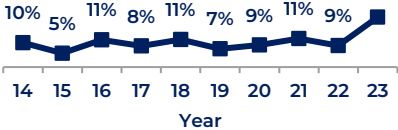
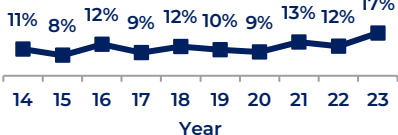
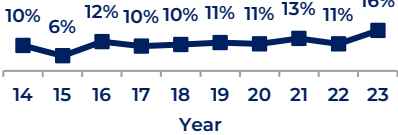
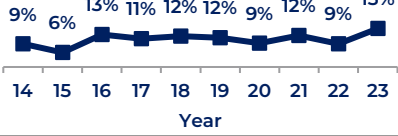
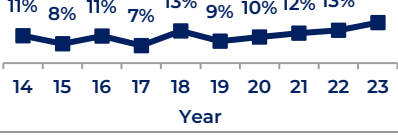
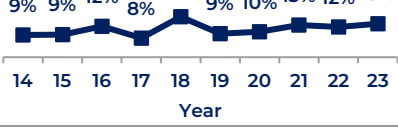

Awareness of WaterSure/ WaterSure Wales	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	8.6%		↔	↓	+4%
Wessex Water (2023 base sample: 200)	10.4%		↔	↔	+2%
Yorkshire Water (2023 base sample: 400)	9.8%		↔	↔	+11%

Table 34: Awareness of WaterSure – WoCs

Awareness of WaterSure	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	11.0%		↔	n/a	+5%
Total WoCs (2023 base sample: 1,535)	10.6%		↑	16%	+5%
Affinity Water (2023 base sample: 250)	10.6%		↔	↔	+6%
Bristol Water (2023 base sample: 300)	10.6%		↑	↔	+3%
Cambridge Water (2023 base sample: 151)	10.8%		↑	↔	+1%
Essex & Suffolk Water (2023 base sample: 150)	11.8%		↑	↔	+5%

Awareness of WaterSure	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year																						
Portsmouth Water (2023 base sample: 150)	9.1%	<table border="1"> <caption>Portsmouth Water Awareness Data</caption> <thead> <tr> <th>Year</th> <th>Awareness (%)</th> </tr> </thead> <tbody> <tr><td>14</td><td>7%</td></tr> <tr><td>15</td><td>6%</td></tr> <tr><td>16</td><td>10%</td></tr> <tr><td>17</td><td>9%</td></tr> <tr><td>18</td><td>8%</td></tr> <tr><td>19</td><td>9%</td></tr> <tr><td>20</td><td>8%</td></tr> <tr><td>21</td><td>12%</td></tr> <tr><td>22</td><td>13%</td></tr> <tr><td>23</td><td>12%</td></tr> </tbody> </table>	Year	Awareness (%)	14	7%	15	6%	16	10%	17	9%	18	8%	19	9%	20	8%	21	12%	22	13%	23	12%	↑	↔	-1%
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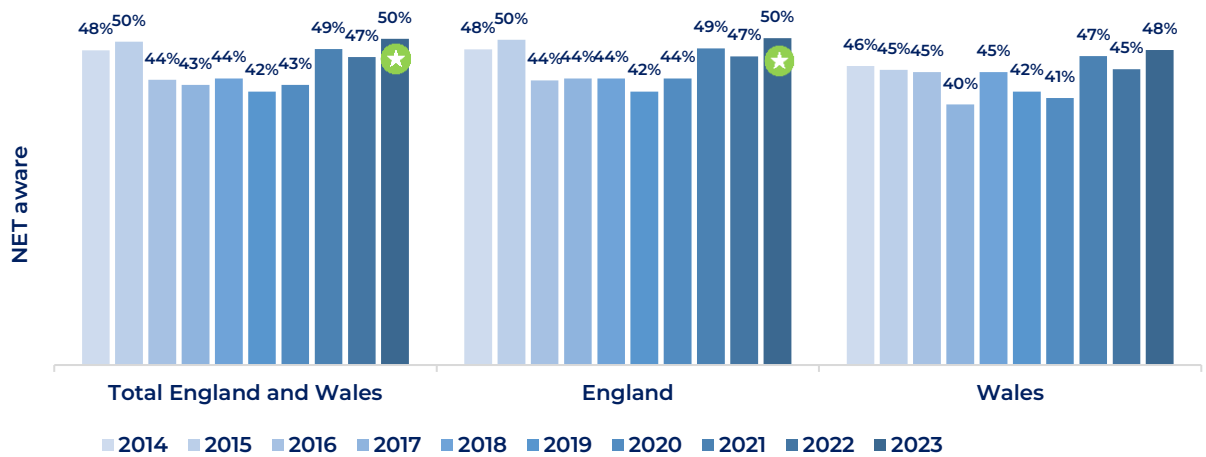
2.7 Awareness of Priority Services

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.

Figure 34 shows national level awareness and trends over the last nine years. This is followed by awareness for each WaSC in Table 35, and for each WoC in Table 36.

Figure 34: Awareness of Priority Services

10-year rolling avg. 2014 – 2023	46.1%	46.2%	44.6%
Change since last year	+3%	+3%	+3%
10-year trend	↔	↔	↔



★ Significant difference between 2022-2023 data in England and in Total

Table 35: Awareness of Priority Services – WaSCs

Awareness of Priority services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	46.1%	<p>48% 50% 44% 43% 44% 42% 43% 49% 47% 50%</p> <p>Year</p>	↔	n/a	+3%
Total WaSCs (2023 base sample: 3,417)	45.9%	<p>48% 49% 44% 43% 44% 42% 42% 49% 48% 49%</p> <p>Year</p>	↔	49%	+2%
Anglian Water (2023 base sample: 200)	48.5%	<p>51% 54% 45% 46% 47% 41% 42% 53% 54% 51%</p> <p>Year</p>	↔	↔	-3%
Dŵr Cymru Welsh Water (2023 base sample: 400)	44.6%	<p>46% 45% 46% 40% 46% 43% 40% 47% 46% 49%</p> <p>Year</p>	↔	↔	+3%
Hafren Dyfrdwy (2023 base sample: 200)	43.6%	<p>43% 42% 44% 49% 45% 40%</p> <p>Year</p>	↔	↓	-5%
Northumbrian Water (2023 base sample: 201)	44.5%	<p>43% 50% 44% 42% 45% 41% 42% 51% 44% 44%</p> <p>Year</p>	↔	↔	0%
Severn Trent (2023 base sample: 200)	46.7%	<p>47% 51% 48% 46% 41% 47% 38% 48% 50% 51%</p> <p>Year</p>	↔	↔	+1%
South West Water (2023 base sample: 400)	50.7%	<p>58% 59% 45% 52% 48% 44% 44% 55% 51% 51%</p> <p>Year</p>	↔	↔	0%
Southern Water (2023 base sample: 400)	44.1%	<p>51% 52% 39% 43% 42% 39% 37% 46% 46% 48%</p> <p>Year</p>	↔	↔	+2%
Thames Water (2023 base sample: 200)	41.0%	<p>43% 41% 37% 37% 41% 35% 43% 49% 39% 47%</p> <p>Year</p>	↔	↔	+8%

Awareness of Priority services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	48.8%	<p>52% 51% 45% 46% 43% 49% 49% 51% 51% 51%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	0%
Wessex Water (2023 base sample: 200)	49.0%	<p>52% 57% 47% 43% 49% 43% 44% 49% 53% 57%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	+4%
Yorkshire Water (2023 base sample: 400)	46.7%	<p>48% 47% 48% 45% 47% 42% 43% 47% 51% 50%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-2%

Table 36: Awareness of Priority Services – WoCs

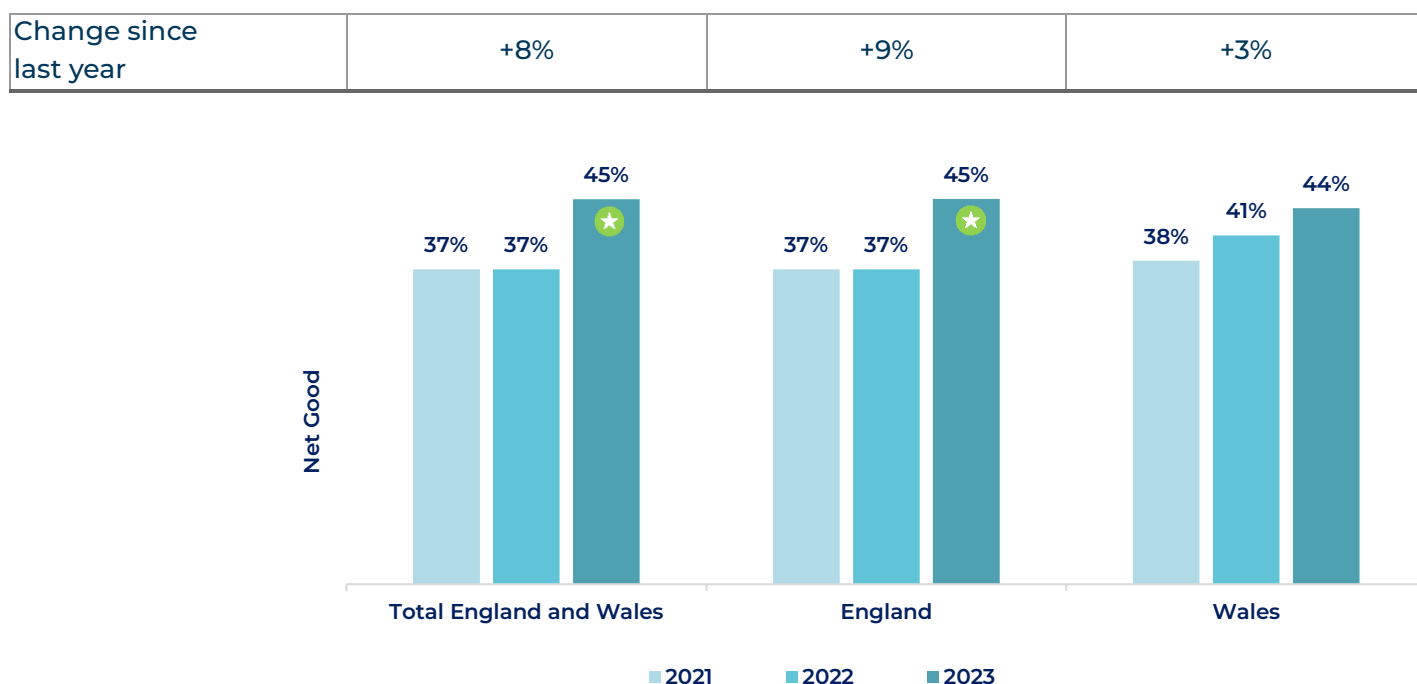
Awareness of Priority services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	46.1%	<p>48% 50% 44% 43% 44% 42% 43% 49% 47% 50%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	n/a	+3%
Total WoCs (2023 base sample: 1,535)	46.7%	<p>50% 52% 43% 44% 46% 43% 47% 45% 45% 52%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	52%	+7%
Affinity Water (2023 base sample: 250)	42.1%	<p>43% 49% 38% 41% 41% 40% 44% 40% 41% 46%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	+6%
Bristol Water (2023 base sample: 300)	52.6%	<p>55% 53% 52% 48% 52% 44% 55% 57% 54% 56%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	+2%
Cambridge Water (2023 base sample: 151)	48.9%	<p>50% 59% 52% 43% 46% 54% 43% 46% 44% 52%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	+8%
Essex & Suffolk Water (2023 base sample: 150)	49.1%	<p>50% 54% 44% 48% 49% 49% 50% 45% 45% 58%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	+13%

Awareness of Priority services	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Portsmouth Water (2023 base sample: 150)	50.0%	<table border="1"> <caption>Portsmouth Water Awareness of Priority Services (2014-2023)</caption> <thead> <tr> <th>Year</th> <th>Awareness (%)</th> </tr> </thead> <tbody> <tr><td>14</td><td>49%</td></tr> <tr><td>15</td><td>54%</td></tr> <tr><td>16</td><td>49%</td></tr> <tr><td>17</td><td>51%</td></tr> <tr><td>18</td><td>51%</td></tr> <tr><td>19</td><td>48%</td></tr> <tr><td>20</td><td>47%</td></tr> <tr><td>21</td><td>56%</td></tr> <tr><td>22</td><td>51%</td></tr> <tr><td>23</td><td>45%</td></tr> </tbody> </table>	Year	Awareness (%)	14	49%	15	54%	16	49%	17	51%	18	51%	19	48%	20	47%	21	56%	22	51%	23	45%	↔	↔	-5%
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South East Water (2023 base sample: 150)	48.4%	<table border="1"> <caption>South East Water Awareness of Priority Services (2014-2023)</caption> <thead> <tr> <th>Year</th> <th>Awareness (%)</th> </tr> </thead> <tbody> <tr><td>14</td><td>59%</td></tr> <tr><td>15</td><td>52%</td></tr> <tr><td>16</td><td>42%</td></tr> <tr><td>17</td><td>41%</td></tr> <tr><td>18</td><td>50%</td></tr> <tr><td>19</td><td>40%</td></tr> <tr><td>20</td><td>49%</td></tr> <tr><td>21</td><td>40%</td></tr> <tr><td>22</td><td>48%</td></tr> <tr><td>23</td><td>61%</td></tr> </tbody> </table>	Year	Awareness (%)	14	59%	15	52%	16	42%	17	41%	18	50%	19	40%	20	49%	21	40%	22	48%	23	61%	↔	↑	+12%
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22	48%																										
23	61%																										
South Staffs Water (2023 base sample: 150)	44.3%	<table border="1"> <caption>South Staffs Water Awareness of Priority Services (2014-2023)</caption> <thead> <tr> <th>Year</th> <th>Awareness (%)</th> </tr> </thead> <tbody> <tr><td>14</td><td>48%</td></tr> <tr><td>15</td><td>56%</td></tr> <tr><td>16</td><td>41%</td></tr> <tr><td>17</td><td>41%</td></tr> <tr><td>18</td><td>44%</td></tr> <tr><td>19</td><td>37%</td></tr> <tr><td>20</td><td>39%</td></tr> <tr><td>21</td><td>50%</td></tr> <tr><td>22</td><td>43%</td></tr> <tr><td>23</td><td>45%</td></tr> </tbody> </table>	Year	Awareness (%)	14	48%	15	56%	16	41%	17	41%	18	44%	19	37%	20	39%	21	50%	22	43%	23	45%	↔	↔	+2%
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SES Water (2023 base sample: 150)	43.5%	<table border="1"> <caption>SES Water Awareness of Priority Services (2014-2023)</caption> <thead> <tr> <th>Year</th> <th>Awareness (%)</th> </tr> </thead> <tbody> <tr><td>14</td><td>51%</td></tr> <tr><td>15</td><td>46%</td></tr> <tr><td>16</td><td>42%</td></tr> <tr><td>17</td><td>44%</td></tr> <tr><td>18</td><td>36%</td></tr> <tr><td>19</td><td>42%</td></tr> <tr><td>20</td><td>42%</td></tr> <tr><td>21</td><td>39%</td></tr> <tr><td>22</td><td>36%</td></tr> <tr><td>23</td><td>57%</td></tr> </tbody> </table>	Year	Awareness (%)	14	51%	15	46%	16	42%	17	44%	18	36%	19	42%	20	42%	21	39%	22	36%	23	57%	↔	↔	+21%
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2.8 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 35 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 37 and Table 38, which show awareness for each WaSC and for each WoC respectively.

Figure 35: Awareness of water companies' offer of reduced bills



★ Significant difference between 2022-2023 data in England and in Total

Table 37: Awareness of water companies' offer of reduced bills – WaSCs

Awareness of offer of reduced bills – net 'Yes'	2021	2022	2023	Difference since last year
Industry (2023 base sample: 4,952)	37%	37%	45%	+8%
Total WaSCs (2023 base sample: 3,417)	36%	37%	45%	+8%
Anglian Water (2023 base sample: 200)	44%	40%	45%	+5%
Dŵr Cymru Welsh Water (2023 base sample: 400)	38%	42%	45%	+3%
Hafren Dyfrdwy (2023 base sample: 200)	37%	33%	40%	+7%

Awareness of offer of reduced bills – net ‘Yes’	2021	2022	2023	Difference since last year
Northumbrian Water (2023 base sample: 201)	34%	38%	39%	+1%
Severn Trent (2023 base sample: 200)	36%	40%	51%	+12%
South West Water (2023 base sample: 400)	44%	42%	46%	+4%
Southern Water (2023 base sample: 400)	_25	34%	46%	+12%
Thames Water (2023 base sample: 200)	34%	37%	50%	+13%
United Utilities (2023 base sample: 700)	35%	32%	39%	+7%
Wessex Water (2023 base sample: 200)	41%	50%	52%	+2%
Yorkshire Water (2023 base sample: 400)	32%	32%	40%	+8%

Table 38: Awareness of company specific social tariff schemes – WoCs

Awareness of offer of reduced bills – net ‘Yes’	2021	2022	2023	Difference since last year
Industry (2023 base sample: 4,952)	37%	37%	45%	+8%
Total WoCs (2023 base sample: 1,535)	40%	36%	45%	+9%
Affinity Water (2023 base sample: 250)	37%	38%	47%	+9%
Bristol Water (2023 base sample: 300)	41%	39%	49%	+10%
Cambridge Water (2023 base sample: 151)	41%	33%	39%	+6%
Essex & Suffolk Water (2023 base sample: 150)	39%	35%	44%	+9%
Portsmouth Water (2023 base sample: 150)	40%	35%	44%	+9%
South East Water (2023 base sample: 150)	_17	35%	43%	+8%
South Staffs Water (2023 base sample: 150)	41%	34%	43%	+9%
SES Water (2023 base sample: 150)	_17	35%	47%	+12%

²⁵ Data omitted due to a routing error in 2021

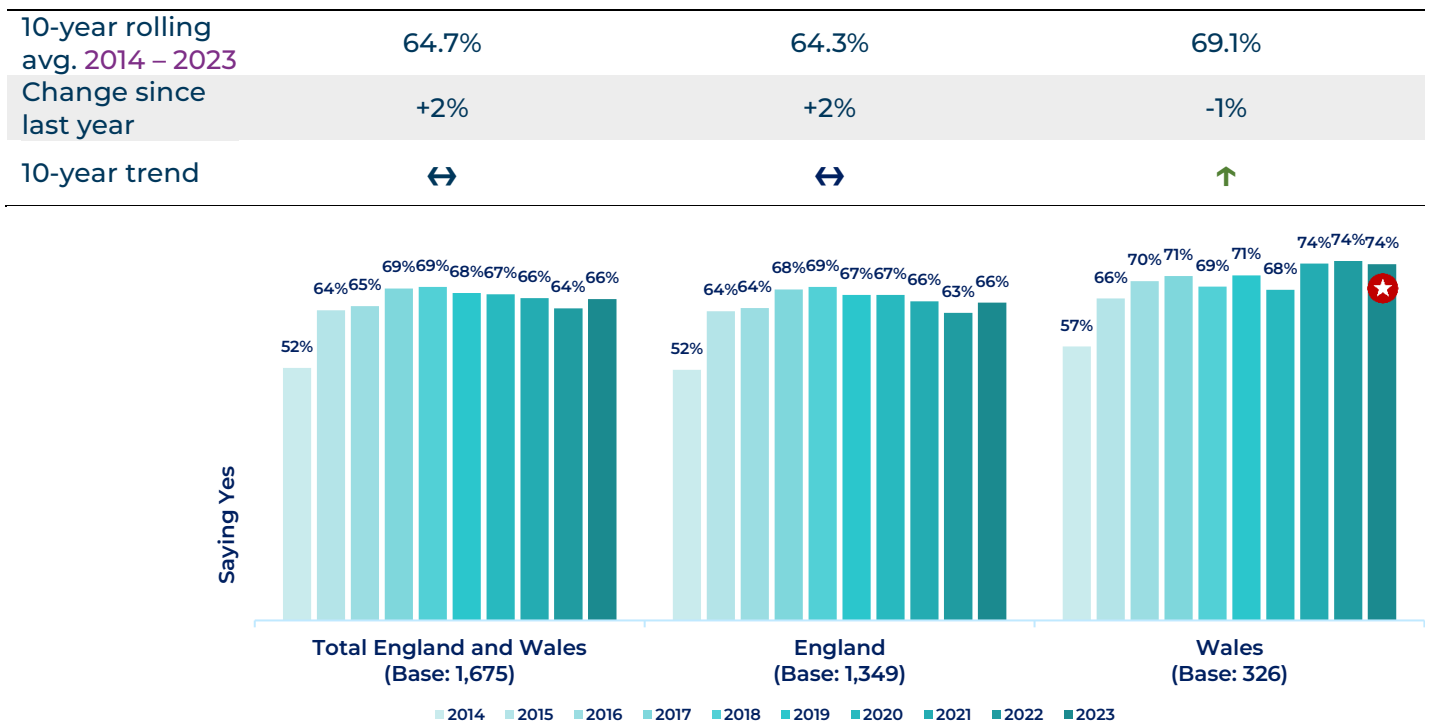
2.9 Awareness of free water meter trial schemes

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.

Figure 36 shows awareness and trends at national levels, and Table 39 and Table 40 show this for WaSCs and WoCs respectively.

Figure 36: Awareness that water meters can be fitted free of charge – unmetered customers



Significant difference between England & Wales 2023

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

Table 39: Awareness that water meters can be fitted free of charge – unmetered customers -WaSCs

Awareness that water meters can be fitted free of charge	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
Industry (2022 base sample: 1,675)	64.7%	<table border="1"> <caption>Industry Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>52%</td></tr> <tr><td>15</td><td>64%</td></tr> <tr><td>16</td><td>65%</td></tr> <tr><td>17</td><td>69%</td></tr> <tr><td>18</td><td>69%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>67%</td></tr> <tr><td>21</td><td>66%</td></tr> <tr><td>22</td><td>64%</td></tr> <tr><td>23</td><td>66%</td></tr> </tbody> </table>	Year	Awareness (%)	14	52%	15	64%	16	65%	17	69%	18	69%	19	68%	20	67%	21	66%	22	64%	23	66%	↔	n/a	+2%
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Total WaSCs (2022 base sample: 1,272)	64.2%	<table border="1"> <caption>Total WaSCs Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>52%</td></tr> <tr><td>15</td><td>64%</td></tr> <tr><td>16</td><td>65%</td></tr> <tr><td>17</td><td>69%</td></tr> <tr><td>18</td><td>68%</td></tr> <tr><td>19</td><td>67%</td></tr> <tr><td>20</td><td>66%</td></tr> <tr><td>21</td><td>66%</td></tr> <tr><td>22</td><td>64%</td></tr> <tr><td>23</td><td>66%</td></tr> </tbody> </table>	Year	Awareness (%)	14	52%	15	64%	16	65%	17	69%	18	68%	19	67%	20	66%	21	66%	22	64%	23	66%	↔	66%	+2%
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Anglian Water (2022 base sample: 36)	68.7%	<table border="1"> <caption>Anglian Water Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>73%</td></tr> <tr><td>15</td><td>70%</td></tr> <tr><td>16</td><td>67%</td></tr> <tr><td>17</td><td>70%</td></tr> <tr><td>18</td><td>70%</td></tr> <tr><td>19</td><td>71%</td></tr> <tr><td>20</td><td>71%</td></tr> <tr><td>21</td><td>69%</td></tr> <tr><td>22</td><td>64%</td></tr> <tr><td>23</td><td>56%</td></tr> </tbody> </table>	Year	Awareness (%)	14	73%	15	70%	16	67%	17	70%	18	70%	19	71%	20	71%	21	69%	22	64%	23	56%	↓	↔	-8%
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Dŵr Cymru Welsh Water (2022 base sample: 216)	69.3%	<table border="1"> <caption>Dŵr Cymru Welsh Water Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>57%</td></tr> <tr><td>15</td><td>67%</td></tr> <tr><td>16</td><td>70%</td></tr> <tr><td>17</td><td>71%</td></tr> <tr><td>18</td><td>69%</td></tr> <tr><td>19</td><td>72%</td></tr> <tr><td>20</td><td>68%</td></tr> <tr><td>21</td><td>74%</td></tr> <tr><td>22</td><td>75%</td></tr> <tr><td>23</td><td>74%</td></tr> </tbody> </table>	Year	Awareness (%)	14	57%	15	67%	16	70%	17	71%	18	69%	19	72%	20	68%	21	74%	22	75%	23	74%	↑	↑	-1%
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Hafren Dyfrdwy (2022 base sample: 110)	69.8%	<table border="1"> <caption>Hafren Dyfrdwy Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>69%</td></tr> <tr><td>15</td><td>64%</td></tr> <tr><td>16</td><td>77%</td></tr> <tr><td>17</td><td>72%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>73%</td></tr> </tbody> </table>	Year	Awareness (%)	14	69%	15	64%	16	77%	17	72%	18	63%	19	73%	↔	↔	+10%								
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Northumbrian Water (2022 base sample: 103)	62.8%	<table border="1"> <caption>Northumbrian Water Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>42%</td></tr> <tr><td>15</td><td>60%</td></tr> <tr><td>16</td><td>69%</td></tr> <tr><td>17</td><td>69%</td></tr> <tr><td>18</td><td>65%</td></tr> <tr><td>19</td><td>64%</td></tr> <tr><td>20</td><td>61%</td></tr> <tr><td>21</td><td>67%</td></tr> <tr><td>22</td><td>68%</td></tr> <tr><td>23</td><td>64%</td></tr> </tbody> </table>	Year	Awareness (%)	14	42%	15	60%	16	69%	17	69%	18	65%	19	64%	20	61%	21	67%	22	68%	23	64%	↔	↔	-4%
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Severn Trent (2022 base sample: 103)	61.9%	<table border="1"> <caption>Severn Trent Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>47%</td></tr> <tr><td>15</td><td>63%</td></tr> <tr><td>16</td><td>59%</td></tr> <tr><td>17</td><td>67%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>62%</td></tr> <tr><td>21</td><td>61%</td></tr> <tr><td>22</td><td>66%</td></tr> <tr><td>23</td><td>68%</td></tr> </tbody> </table>	Year	Awareness (%)	14	47%	15	63%	16	59%	17	67%	18	63%	19	68%	20	62%	21	61%	22	66%	23	68%	↑	↔	+2%
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South West Water (2022 base sample: 96)	77.7%	<table border="1"> <caption>South West Water Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>75%</td></tr> <tr><td>15</td><td>88%</td></tr> <tr><td>16</td><td>75%</td></tr> <tr><td>17</td><td>82%</td></tr> <tr><td>18</td><td>83%</td></tr> <tr><td>19</td><td>69%</td></tr> <tr><td>20</td><td>77%</td></tr> <tr><td>21</td><td>81%</td></tr> <tr><td>22</td><td>76%</td></tr> <tr><td>23</td><td>69%</td></tr> </tbody> </table>	Year	Awareness (%)	14	75%	15	88%	16	75%	17	82%	18	83%	19	69%	20	77%	21	81%	22	76%	23	69%	↔	↔	-7%
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Thames Water (2022 base sample: 69)	53.9%	<table border="1"> <caption>Thames Water Awareness Data</caption> <thead> <tr><th>Year</th><th>Awareness (%)</th></tr> </thead> <tbody> <tr><td>14</td><td>41%</td></tr> <tr><td>15</td><td>58%</td></tr> <tr><td>16</td><td>60%</td></tr> <tr><td>17</td><td>66%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>47%</td></tr> <tr><td>20</td><td>54%</td></tr> <tr><td>21</td><td>50%</td></tr> <tr><td>22</td><td>47%</td></tr> <tr><td>23</td><td>54%</td></tr> </tbody> </table>	Year	Awareness (%)	14	41%	15	58%	16	60%	17	66%	18	63%	19	47%	20	54%	21	50%	22	47%	23	54%	↔	↓	+7%
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Awareness that water meters can be fitted free of charge	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year																						
United Utilities (2022 base sample: 337)	69.4%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>58</td><td>67</td><td>70</td><td>71</td><td>73</td><td>73</td><td>69</td><td>74</td><td>69</td><td>72</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	58	67	70	71	73	73	69	74	69	72	↑	↑	+3%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	58	67	70	71	73	73	69	74	69	72																	
Wessex Water (2022 base sample: 73)	71.5%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>59</td><td>65</td><td>70</td><td>81</td><td>83</td><td>78</td><td>75</td><td>64</td><td>70</td><td>71</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	59	65	70	81	83	78	75	64	70	71	↔	↔	+1%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	59	65	70	81	83	78	75	64	70	71																	
Yorkshire Water (2022 base sample: 153)	64.8%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>51</td><td>62</td><td>65</td><td>60</td><td>68</td><td>74</td><td>73</td><td>69</td><td>67</td><td>63</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	51	62	65	60	68	74	73	69	67	63	↑	↔	-4%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	51	62	65	60	68	74	73	69	67	63																	

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

Table 40: Awareness that water meters can be fitted free of charge – unmetered customers -WoCs

Awareness that water meters can be fitted free of charge	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year																						
Industry (2022 base sample: 1,675)	64.7%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>52</td><td>64</td><td>65</td><td>69</td><td>69</td><td>68</td><td>67</td><td>66</td><td>64</td><td>66</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	52	64	65	69	69	68	67	66	64	66	↔	n/a	+2%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	52	64	65	69	69	68	67	66	64	66																	
Total WoCs (2022 base sample: 403)	66.8%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>53</td><td>65</td><td>64</td><td>69</td><td>74</td><td>71</td><td>75</td><td>71</td><td>69</td><td>71</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	53	65	64	69	74	71	75	71	69	71	↑	71%	+2%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	53	65	64	69	74	71	75	71	69	71																	
Bristol Water (2022 base sample: 110)	70.9%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>58</td><td>70</td><td>68</td><td>70</td><td>72</td><td>77</td><td>81</td><td>78</td><td>75</td><td>66</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	58	70	68	70	72	77	81	78	75	66	↑	↔	-8%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	58	70	68	70	72	77	81	78	75	66																	
Cambridge Water (2022 base sample: 47)	68.0%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>54</td><td>69</td><td>67</td><td>61</td><td>73</td><td>69</td><td>77</td><td>75</td><td>72</td><td>68</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	54	69	67	61	73	69	77	75	72	68	↑	↔	-4%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	54	69	67	61	73	69	77	75	72	68																	
Essex & Suffolk Water (2022 base sample: 43)	70.5%	<table border="1"> <tr><th>Year</th><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Awareness (%)</th><td>64</td><td>76</td><td>75</td><td>69</td><td>77</td><td>65</td><td>77</td><td>63</td><td>57</td><td>79</td></tr> </table>	Year	14	15	16	17	18	19	20	21	22	23	Awareness (%)	64	76	75	69	77	65	77	63	57	79	↔	↔	+22%
Year	14	15	16	17	18	19	20	21	22	23																	
Awareness (%)	64	76	75	69	77	65	77	63	57	79																	

Awareness that water meters can be fitted free of charge	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Portsmouth Water (2022 base sample: 94)	67.7%		↑	↔	+1%
South Staffs Water (2022 base sample: 77)	66.3%		↑	↔	-2%

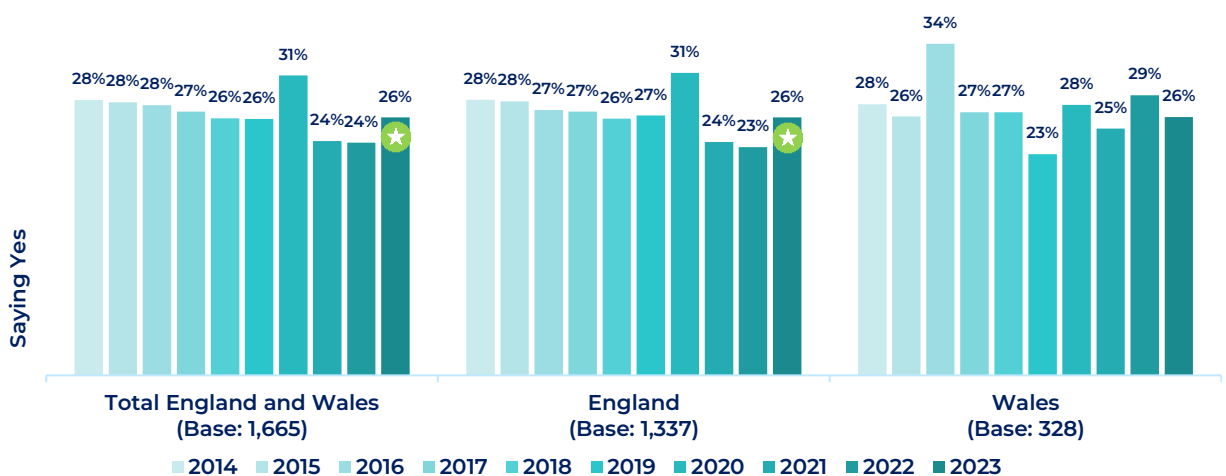
Footnote: All customers of South East Water and SES Water, as well as the majority of Affinity Water customers were not asked this question because of their company's universal metering scheme.

2.10 Awareness that a water meter can be trialled – 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 37. This is followed by Table 41 and Table 42 which show this for each WaSC and WoC respectively.

Figure 37: Awareness of the possibility to trial a water meter – unmetered customers

10-year rolling avg. 2014 – 2023	26.8%	26.8%	27.2%
Change since last year	+3%	+3%	-2%
10-year trend	↓	↓	↔



★ Significant difference between 2022-2023 data in England and in Total

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

Table 41: Awareness of the possibility to trial a water meter – unmetered customers - WaSCs

Awareness of the 24-month trial period for a water meter	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 1,665)	26.8%	<p>28% 28% 28% 27% 26% 26% 31% 24% 24% 26%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	+3%
Total WaSCs (2023 base sample: 1,264)	26.9%	<p>28% 28% 28% 28% 26% 26% 31% 24% 23% 27%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	27%	+4%
Anglian Water (2023 base sample: 34)	35.7%	<p>43% 32% 45% 30% 33% 33% 46% 31% 31% 32%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	+2%
Dŵr Cymru Welsh Water (2023 base sample: 219)	27.3%	<p>28% 26% 35% 27% 27% 23% 28% 25% 29% 26%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-2%
Hafren Dyfrdwy (2023 base sample: 109)	26.6%	<p>30% 24% 26% 31% 25% 25%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-1%
Northumbrian Water (2023 base sample: 103)	24.0%	<p>21% 25% 34% 28% 21% 22% 23% 23% 22% 19%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-2%
Severn Trent (2023 base sample: 103)	23.0%	<p>25% 24% 19% 20% 20% 22% 27% 20% 22% 30%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	+8%
South West Water (2023 base sample: 93)	32.8%	<p>39% 49% 41% 35% 35% 25% 39% 25% 27% 19%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-8%
Thames Water (2023 base sample: 69)	20.6%	<p>23% 28% 26% 24% 28% 16% 27% 11% 10% 12%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↓	+2%

Awareness of the 24-month trial period for a water meter	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 336)	32.3%	<p>Year</p>	↔	↑	+5%
Wessex Water (2023 base sample: 72)	32.2%	<p>Year</p>	↔	↔	-5%
Yorkshire Water (2023 base sample: 150)	28.1%	<p>Year</p>	↔	↔	+4%

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

Table 42: Awareness of the possibility to trial a water meter – unmetered customers - WoCs

Awareness of the 24-month trial period for a water meter	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 1,665)	26.8%	<p>Year</p>	↓	n/a	+3%
Total WoCs (2022 base sample: 401)	26.7%	<p>Year</p>	↔	23%	-5%
Bristol Water (2022 base sample: 108)	28.5%	<p>Year</p>	↔	↔	-10%
Cambridge Water (2022 base sample: 47)	24.2%	<p>Year</p>	↓	↔	+7%
Essex & Suffolk Water (2022 base sample: 43)	27.0%	<p>Year</p>	↔	↔	+11%

Awareness of the 24-month trial period for a water meter	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Portsmouth Water (2022 base sample: 93)	26.5%		↔	↔	0%
South Staffs Water (2022 base sample: 78)	29.2%		↔	↔	-8%

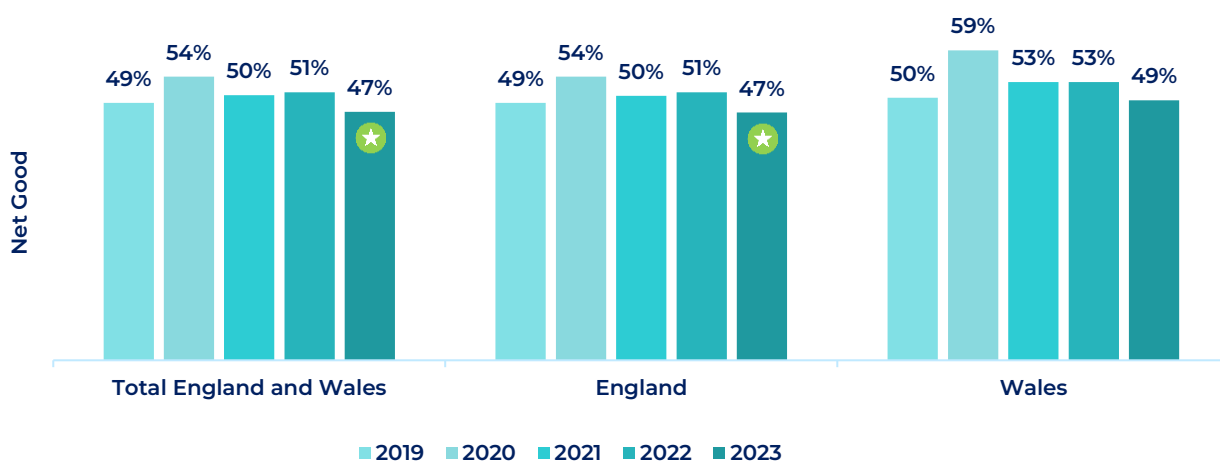
Footnote: All customers of South East Water and SES Water, as well as the majority of Affinity Water customers were not asked this question because of their company's universal metering scheme.

2.11 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 38 shows national level data, and Table 43 and Table 44 show this for each WaSC and for each WoC respectively.

Figure 38: Perceptions of communications from water companies about services and plans

5-year rolling avg. 2019 – 2023	50.4%	50.3%	52.7%
Change since last year	-4%	-4%	-3%
5-year trend	↔	↔	↔



★ Significant difference between 2022-2023 data in England and in Total

Table 43: Perceptions of communications from water companies about services and plans – WaSCs NET good

Perceptions of communications NET good	Five-year rolling company average	Five-year company trend	Five-year trend	Company average vs WaSC average	Change since last year												
Industry (2023 base sample: 4,952)	50.4%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>49%</td><td>54%</td><td>50%</td><td>51%</td><td>47%</td></tr> </table>	Year	19	20	21	22	23	Value	49%	54%	50%	51%	47%	↔	n/a	-4%
Year	19	20	21	22	23												
Value	49%	54%	50%	51%	47%												
Total WaSCs (2023 base sample: 3,417)	50.6%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>49%</td><td>55%</td><td>51%</td><td>52%</td><td>47%</td></tr> </table>	Year	19	20	21	22	23	Value	49%	55%	51%	52%	47%	↔	47%	-5%
Year	19	20	21	22	23												
Value	49%	55%	51%	52%	47%												
Anglian Water (2023 base sample: 200)	54.4%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>49%</td><td>55%</td><td>59%</td><td>55%</td><td>55%</td></tr> </table>	Year	19	20	21	22	23	Value	49%	55%	59%	55%	55%	↔	↑	0%
Year	19	20	21	22	23												
Value	49%	55%	59%	55%	55%												
Dŵr Cymru Welsh Water (2023 base sample: 400)	53.1%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>50%</td><td>60%</td><td>53%</td><td>53%</td><td>50%</td></tr> </table>	Year	19	20	21	22	23	Value	50%	60%	53%	53%	50%	↔	↔	-3%
Year	19	20	21	22	23												
Value	50%	60%	53%	53%	50%												
Hafren Dyfrdwy (2023 base sample: 200)	48.3%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>52%</td><td>50%</td><td>50%</td><td>46%</td><td>44%</td></tr> </table>	Year	19	20	21	22	23	Value	52%	50%	50%	46%	44%	↓	↔	-2%
Year	19	20	21	22	23												
Value	52%	50%	50%	46%	44%												
Northumbrian Water (2023 base sample: 201)	53.3%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>61%</td><td>52%</td><td>52%</td><td>57%</td><td>46%</td></tr> </table>	Year	19	20	21	22	23	Value	61%	52%	52%	57%	46%	↔	↔	-12%
Year	19	20	21	22	23												
Value	61%	52%	52%	57%	46%												
Severn Trent (2023 base sample: 200)	51.7%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>50%</td><td>58%</td><td>46%</td><td>56%</td><td>49%</td></tr> </table>	Year	19	20	21	22	23	Value	50%	58%	46%	56%	49%	↔	↔	-8%
Year	19	20	21	22	23												
Value	50%	58%	46%	56%	49%												
South West Water (2023 base sample: 400)	52.6%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>50%</td><td>62%</td><td>54%</td><td>55%</td><td>44%</td></tr> </table>	Year	19	20	21	22	23	Value	50%	62%	54%	55%	44%	↔	↔	-10%
Year	19	20	21	22	23												
Value	50%	62%	54%	55%	44%												
Southern Water (2023 base sample: 400)	41.6%	<table border="1"> <tr><th>Year</th><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><th>Value</th><td>41%</td><td>44%</td><td>49%</td><td>38%</td><td>37%</td></tr> </table>	Year	19	20	21	22	23	Value	41%	44%	49%	38%	37%	↔	↓	-1%
Year	19	20	21	22	23												
Value	41%	44%	49%	38%	37%												

Perceptions of communications NET good	Five-year rolling company average	Five-year company trend	Five-year trend	Company average vs WaSC average	Change since last year												
Thames Water (2023 base sample: 200)	42.9%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>39%</td> </tr> <tr> <td>20</td> <td>50%</td> </tr> <tr> <td>21</td> <td>45%</td> </tr> <tr> <td>22</td> <td>41%</td> </tr> <tr> <td>23</td> <td>39%</td> </tr> </tbody> </table>	Year	Perception (%)	19	39%	20	50%	21	45%	22	41%	23	39%	↔	↓	-2%
Year	Perception (%)																
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21	45%																
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United Utilities (2023 base sample: 700)	52.5%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>49%</td> </tr> <tr> <td>20</td> <td>55%</td> </tr> <tr> <td>21</td> <td>51%</td> </tr> <tr> <td>22</td> <td>56%</td> </tr> <tr> <td>23</td> <td>53%</td> </tr> </tbody> </table>	Year	Perception (%)	19	49%	20	55%	21	51%	22	56%	23	53%	↔	↑	-3%
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23	53%																
Wessex Water (2023 base sample: 200)	59.8%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>63%</td> </tr> <tr> <td>20</td> <td>66%</td> </tr> <tr> <td>21</td> <td>59%</td> </tr> <tr> <td>22</td> <td>56%</td> </tr> <tr> <td>23</td> <td>55%</td> </tr> </tbody> </table>	Year	Perception (%)	19	63%	20	66%	21	59%	22	56%	23	55%	↓	↑	-2%
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Yorkshire Water (2023 base sample: 400)	53.8%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>60%</td> </tr> <tr> <td>20</td> <td>57%</td> </tr> <tr> <td>21</td> <td>53%</td> </tr> <tr> <td>22</td> <td>54%</td> </tr> <tr> <td>23</td> <td>46%</td> </tr> </tbody> </table>	Year	Perception (%)	19	60%	20	57%	21	53%	22	54%	23	46%	↓	↔	-8%
Year	Perception (%)																
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Table 44: Perceptions of communications from water companies about services and plans – WoCs NET good

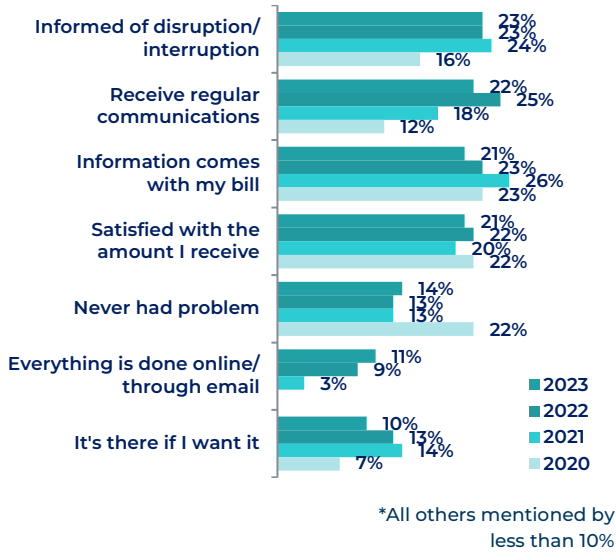
Perceptions of communications NET good	Five-year rolling company average	Five-year company trend NET Good	Five-year trend	Company average vs WoC average	Change since last year												
Industry (2023 base sample: 4,952)	50.4%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>49%</td> </tr> <tr> <td>20</td> <td>54%</td> </tr> <tr> <td>21</td> <td>50%</td> </tr> <tr> <td>22</td> <td>51%</td> </tr> <tr> <td>23</td> <td>47%</td> </tr> </tbody> </table>	Year	Perception (%)	19	49%	20	54%	21	50%	22	51%	23	47%	↔	n/a	-4%
Year	Perception (%)																
19	49%																
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21	50%																
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Total WoCs (2023 base sample: 1,535)	49.8%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>50%</td> </tr> <tr> <td>20</td> <td>51%</td> </tr> <tr> <td>21</td> <td>50%</td> </tr> <tr> <td>22</td> <td>51%</td> </tr> <tr> <td>23</td> <td>48%</td> </tr> </tbody> </table>	Year	Perception (%)	19	50%	20	51%	21	50%	22	51%	23	48%	↔	48%	-3%
Year	Perception (%)																
19	50%																
20	51%																
21	50%																
22	51%																
23	48%																
Affinity Water (2023 base sample: 250)	47.8%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>47%</td> </tr> <tr> <td>20</td> <td>43%</td> </tr> <tr> <td>21</td> <td>47%</td> </tr> <tr> <td>22</td> <td>50%</td> </tr> <tr> <td>23</td> <td>51%</td> </tr> </tbody> </table>	Year	Perception (%)	19	47%	20	43%	21	47%	22	50%	23	51%	↔	↔	+1%
Year	Perception (%)																
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21	47%																
22	50%																
23	51%																
Bristol Water (2023 base sample: 300)	61.6%	<table border="1"> <thead> <tr> <th>Year</th> <th>Perception (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>62%</td> </tr> <tr> <td>20</td> <td>64%</td> </tr> <tr> <td>21</td> <td>59%</td> </tr> <tr> <td>22</td> <td>64%</td> </tr> <tr> <td>23</td> <td>59%</td> </tr> </tbody> </table>	Year	Perception (%)	19	62%	20	64%	21	59%	22	64%	23	59%	↔	↑	-5%
Year	Perception (%)																
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23	59%																

Perceptions of communications NET good	Five-year rolling company average	Five-year company trend NET Good	Five-year trend	Company average vs WoC average	Change since last year												
Cambridge Water (2023 base sample: 151)	50.6%	<table border="1"> <caption>Cambridge Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>55%</td> </tr> <tr> <td>20</td> <td>56%</td> </tr> <tr> <td>21</td> <td>51%</td> </tr> <tr> <td>22</td> <td>48%</td> </tr> <tr> <td>23</td> <td>43%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	55%	20	56%	21	51%	22	48%	23	43%	↓	↔	-5%
Year	NET Good (%)																
19	55%																
20	56%																
21	51%																
22	48%																
23	43%																
Essex & Suffolk Water (2023 base sample: 150)	53.2%	<table border="1"> <caption>Essex & Suffolk Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>53%</td> </tr> <tr> <td>20</td> <td>56%</td> </tr> <tr> <td>21</td> <td>56%</td> </tr> <tr> <td>22</td> <td>51%</td> </tr> <tr> <td>23</td> <td>51%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	53%	20	56%	21	56%	22	51%	23	51%	↔	↔	0%
Year	NET Good (%)																
19	53%																
20	56%																
21	56%																
22	51%																
23	51%																
Portsmouth Water (2023 base sample: 150)	45.5%	<table border="1"> <caption>Portsmouth Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>47%</td> </tr> <tr> <td>20</td> <td>46%</td> </tr> <tr> <td>21</td> <td>47%</td> </tr> <tr> <td>22</td> <td>50%</td> </tr> <tr> <td>23</td> <td>40%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	47%	20	46%	21	47%	22	50%	23	40%	↔	↓	-10%
Year	NET Good (%)																
19	47%																
20	46%																
21	47%																
22	50%																
23	40%																
South East Water (2023 base sample: 150)	47.9%	<table border="1"> <caption>South East Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>46%</td> </tr> <tr> <td>20</td> <td>52%</td> </tr> <tr> <td>21</td> <td>47%</td> </tr> <tr> <td>22</td> <td>49%</td> </tr> <tr> <td>23</td> <td>46%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	46%	20	52%	21	47%	22	49%	23	46%	↔	↔	-3%
Year	NET Good (%)																
19	46%																
20	52%																
21	47%																
22	49%																
23	46%																
South Staffs Water (2023 base sample: 150)	43.4%	<table border="1"> <caption>South Staffs Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>40%</td> </tr> <tr> <td>20</td> <td>53%</td> </tr> <tr> <td>21</td> <td>48%</td> </tr> <tr> <td>22</td> <td>45%</td> </tr> <tr> <td>23</td> <td>30%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	40%	20	53%	21	48%	22	45%	23	30%	↔	↓	-15%
Year	NET Good (%)																
19	40%																
20	53%																
21	48%																
22	45%																
23	30%																
SES Water (2023 base sample: 150)	46.5%	<table border="1"> <caption>SES Water NET Good Trend</caption> <thead> <tr> <th>Year</th> <th>NET Good (%)</th> </tr> </thead> <tbody> <tr> <td>19</td> <td>51%</td> </tr> <tr> <td>20</td> <td>46%</td> </tr> <tr> <td>21</td> <td>43%</td> </tr> <tr> <td>22</td> <td>40%</td> </tr> <tr> <td>23</td> <td>53%</td> </tr> </tbody> </table>	Year	NET Good (%)	19	51%	20	46%	21	43%	22	40%	23	53%	↔	↔	+13%
Year	NET Good (%)																
19	51%																
20	46%																
21	43%																
22	40%																
23	53%																

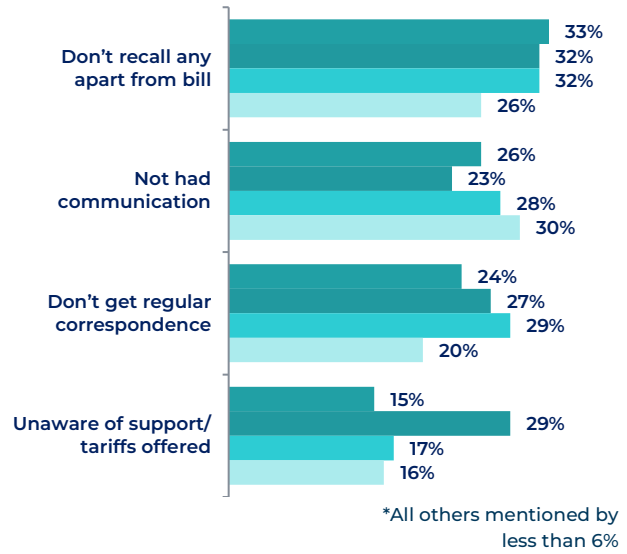
Figure 39 details the main reasons (unprompted) why respondents gave their rating, with the main positive and negative comments shown at a total level.

Figure 39: Reasons for rating how well communicate on services and plans

Positive (net good). Base: 2,190



Negative (net poor). Base: 1,060

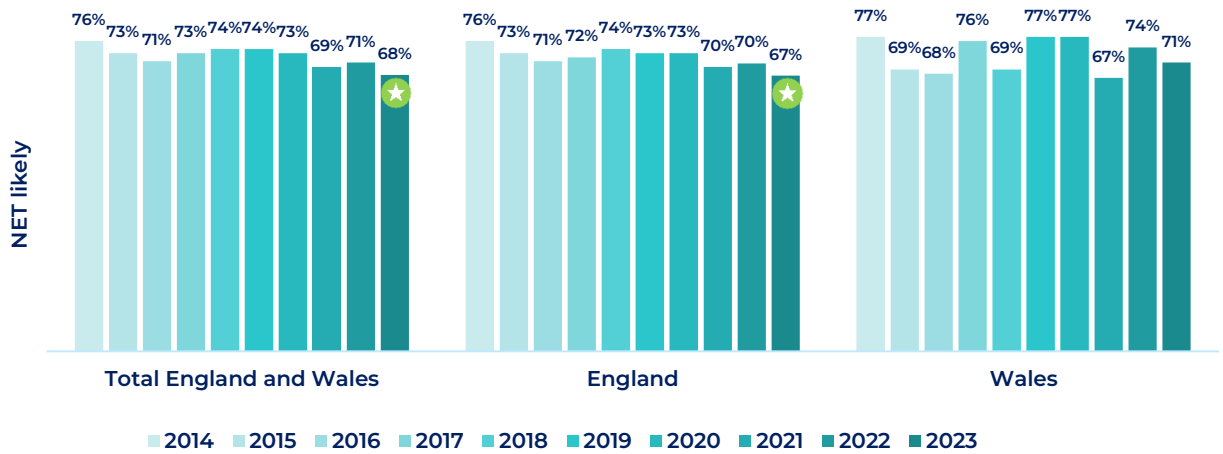


2.12 Likelihood of making contact with the company if worried about paying the bill

Respondents were asked how likely they would be to contact their water company if they were worried about paying a bill. Figure 40 shows likelihood at national levels, and Table 45 and Table 46 show this for each WaSC and for each WoC respectively.

Figure 40: Likelihood of contacting water/sewerage company if worried about a bill

10-year rolling avg. 2014 – 2023	72.0%	72.0%	72.4%
Change since last year	-3%	-3%	-4%
10-year trend	↓	↓	↔



* Significant difference between 2022-2023 data in England, Wales and in Total

Table 45: Likelihood of contacting water/sewerage company if worried about a bill – WaSCs

Likely to contact if worried about bill	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	72.0%	<p>76% 73% 71% 73% 74% 74% 73% 69% 71% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-3%
Total WaSCs (2023 base sample: 3,417)	72.1%	<p>76% 72% 71% 72% 74% 73% 73% 70% 71% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	68%	-3%
Anglian Water (2023 base sample: 200)	74.1%	<p>78% 77% 74% 72% 77% 74% 78% 74% 70% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-1%
Dŵr Cymru Welsh Water (2023 base sample: 400)	72.3%	<p>77% 68% 68% 76% 68% 78% 77% 67% 74% 71%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-4%
Hafren Dyfrdwy (2023 base sample: 200)	73.3%	<p>80% 72% 74% 66% 76% 72%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-3%
Northumbrian Water (2023 base sample: 201)	71.1%	<p>77% 67% 75% 71% 69% 71% 78% 68% 71% 65%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-5%
Severn Trent (2023 base sample: 200)	72.3%	<p>78% 75% 71% 75% 67% 76% 73% 71% 73% 64%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-8%
South West Water (2023 base sample: 400)	72.5%	<p>75% 74% 69% 80% 73% 73% 77% 67% 73% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-5%
Southern Water (2023 base sample: 400)	72.7%	<p>81% 77% 65% 72% 79% 76% 71% 70% 67% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	+1%

Likely to contact if worried about bill	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Thames Water (2023 base sample: 200)	69.6%	<p>72% 68% 72% 65% 79% 68% 64% 72% 71% 67%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-4%
United Utilities (2023 base sample: 700)	71.8%	<p>76% 72% 70% 74% 74% 74% 74% 66% 70% 69%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-1%
Wessex Water (2023 base sample: 200)	73.9%	<p>77% 76% 71% 71% 74% 79% 79% 72% 70% 70%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	+1%
Yorkshire Water (2023 base sample: 400)	73.5%	<p>77% 73% 71% 73% 77% 75% 72% 70% 72% 74%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	+2%

Table 46: Likelihood of contacting water company if worried about a bill – WoCs

Likely to contact if worried about bill	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	72.0%	<p>76% 73% 71% 73% 74% 74% 73% 69% 71% 68%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-3%
Total WoCs (2023 base sample: 1,535)	71.8%	<p>76% 73% 71.2% 74% 72% 74% 73% 68% 69% 66%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	66%	-3%
Affinity Water (2023 base sample: 250)	70.0%	<p>76% 70% 70% 73% 70% 71% 71% 70% 66% 63%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-3%
Bristol Water (2023 base sample: 300)	70.6%	<p>74% 76% 67% 70% 74% 70% 77% 67% 67% 64%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-2%
Cambridge Water (2023 base sample: 151)	71.9%	<p>79% 73% 68% 71% 74% 76% 73% 70% 71% 64%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-7%

Likely to contact if worried about bill	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Essex & Suffolk Water (2023 base sample: 150)	72.6%	<p>74% 76% 73% 74% 75% 79% 75% 67% 70% 63%</p> <p>Year</p>	↔	↔	-7%
Portsmouth Water (2023 base sample: 150)	73.0%	<p>83% 73% 73% 78% 77% 75% 76% 69% 64% 64%</p> <p>Year</p>	↓	↔	0%
South East Water (2023 base sample: 150)	72.6%	<p>76% 74% 73% 76% 74% 76% 76% 65% 67% 70%</p> <p>Year</p>	↔	↔	+3%
South Staffs Water (2023 base sample: 150)	74.4%	<p>82% 80% 74% 81% 67% 73% 69% 72% 76% 71%</p> <p>Year</p>	↓	↔	-5%
SES Water (2023 base sample: 150)	69.2%	<p>70% 64% 64% 71% 66% 79% 69% 68% 76% 65%</p> <p>Year</p>	↔	↔	-11%

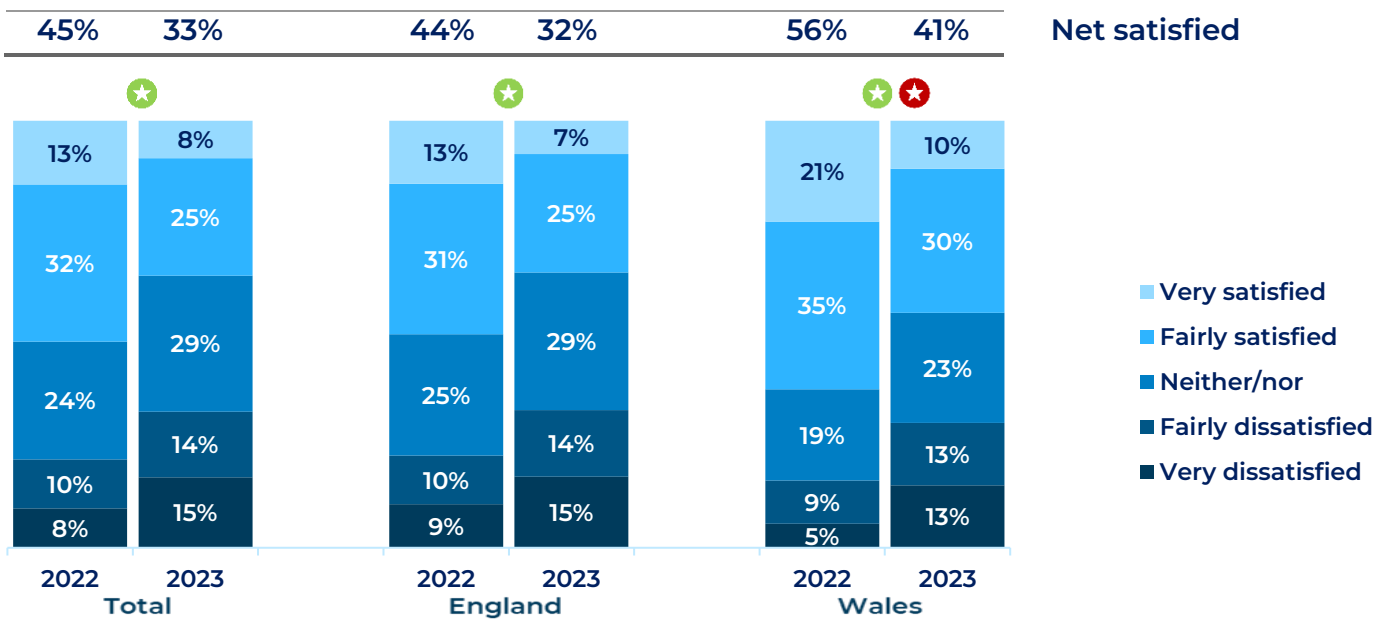
Chapter 3: Resilient Water Services

This chapter presents customers' views on the long-term resilience of the water sector, as well as tracking consumer behaviour change when it comes to water usage.

3.1 Protecting the environment

Figure 41 shows the results for the satisfaction with what water companies do to protect the environment for England and Wales, and for England and for Wales individually, followed by Figure 42 which shows the reason for their rating.

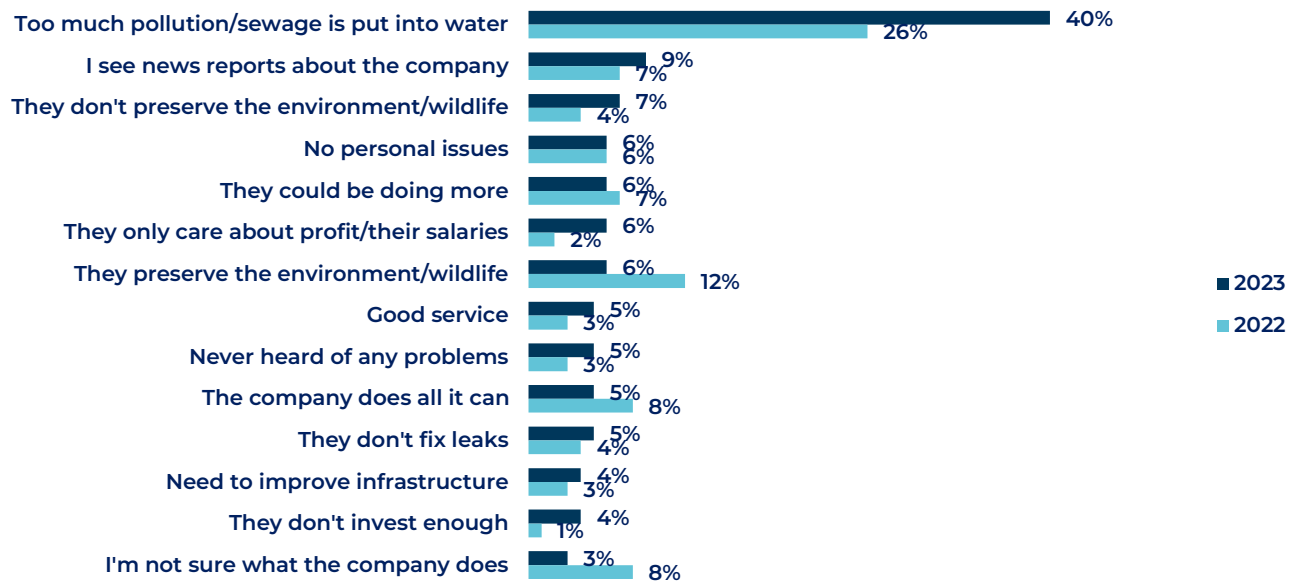
Figure 41: Satisfaction with what water company does to protect the environment



★ Significant difference for net satisfied between 2022-2023 data in England, in Wales and in Total

★ Significant difference between England & Wales 2023

Figure 42: Reason for rating

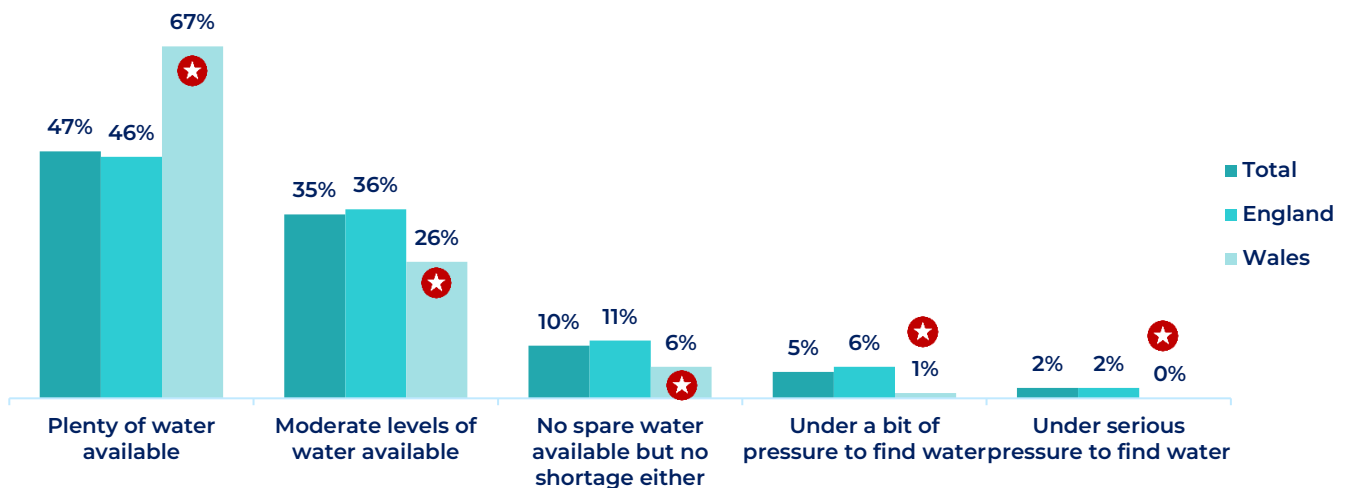


*All others mentioned by less than 3%

3.2 Availability of water

Introduced in 2023, customers were asked about their perceptions regarding the amount of water available in their local area. Figure 43 shows the results for England and Wales, and for England and for Wales individually, followed by Table 47 and Table 48 which show results for WaSCs and for WoCs in turn.

Figure 43: Availability of water in your local area



* Significant difference between England & Wales 2023

Table 47: Availability of water in your local area – WaSCs

Saying plenty of water available	%
Industry (2023 base sample: 4,952)	47%
Total WaSCs (2023 base sample: 3,417)	49%
Anglian Water (2023 base sample: 200)	43%
Dŵr Cymru Welsh Water (2023 base sample: 400)	67%
Hafren Dyfrdwy (2023 base sample: 200)	67%
Northumbrian Water (2023 base sample: 201)	75%
Severn Trent (2023 base sample: 200)	47%
South West Water (2023 base sample: 400)	35%
Southern Water (2023 base sample: 400)	31%
Thames Water (2023 base sample: 200)	39%
United Utilities (2023 base sample: 700)	60%
Wessex Water (2023 base sample: 200)	54%
Yorkshire Water (2023 base sample: 400)	52%

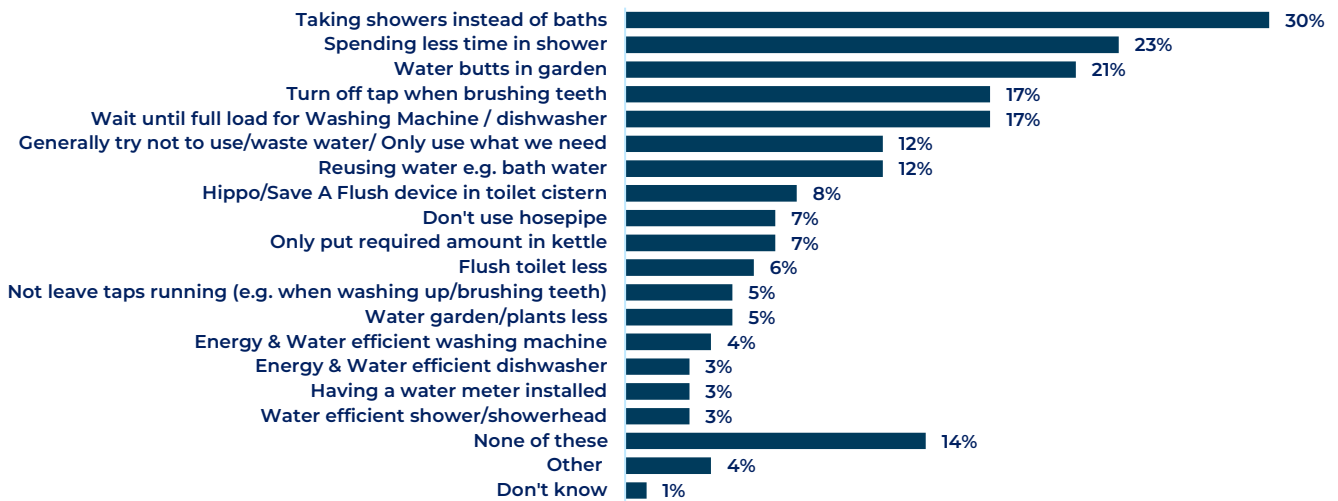
Table 48: Availability of water in your local area – WoCs

Saying plenty of water available	%
Industry (2023 base sample: 4,952)	47%
Total WoCs (2023 base sample: 1,535)	39%
Affinity Water (2023 base sample: 250)	38%
Bristol Water (2023 base sample: 300)	52%
Cambridge Water (2023 base sample: 151)	26%
Essex & Suffolk Water (2023 base sample: 150)	38%
Portsmouth Water (2023 base sample: 150)	44%
South East Water (2023 base sample: 150)	23%
South Staffs Water (2023 base sample: 150)	54%
SES Water (2023 base sample: 150)	33%

3.3 Water usage

Introduced in 2023, customers were asked questions about their water usage. Firstly they were asked what actions they had taken to reduce water usage and Figure 44 shows the results for the England and Wales combined. This was followed by whether it was a conscious decision to use less water or not and why (these two questions were only asked in the pilot period of fieldwork – therefore base sizes are lower). Figure 45 shows the results as to whether it was a conscious decision for England and Wales, and for England and for Wales individually, followed by Figure 46 as to the reasons why.

Figure 44: Actions taken to reduce water usage



Note: all others mentioned by less than 3%

Figure 45: Whether conscious decision to use less water

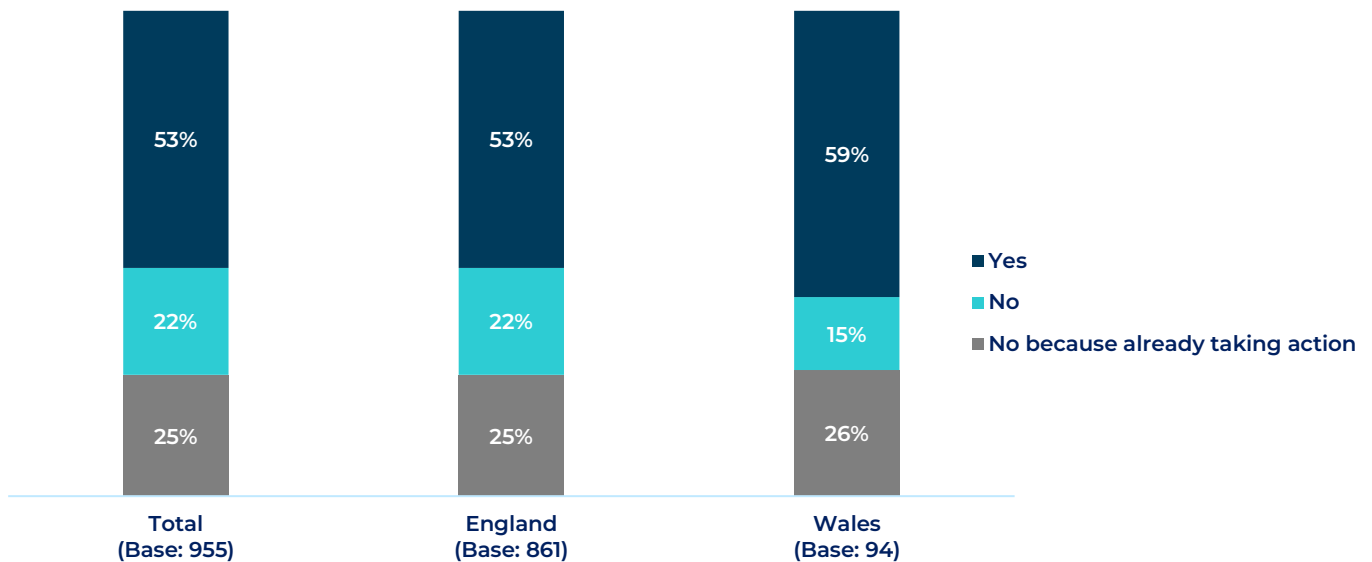
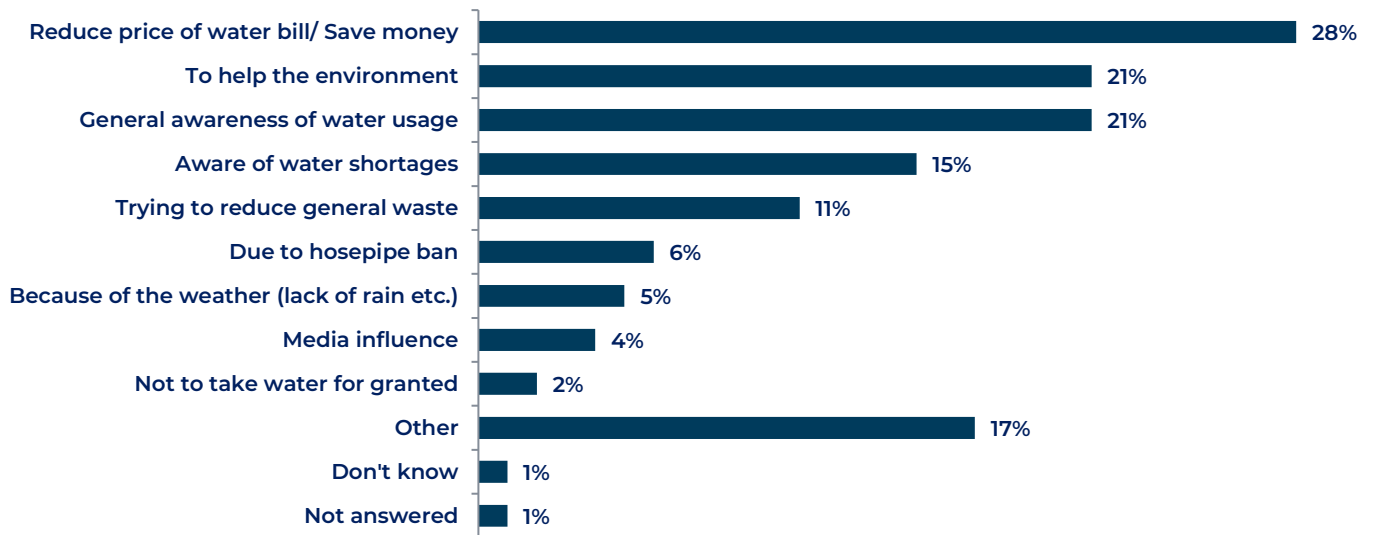


Figure 46: Why customers are doing things differently



Note: all others mentioned by less than 2%

3.4 Using water wisely campaigns

Introduced in 2023, customers were asked whether they were aware of using water wisely campaigns Figure 47 shows the results for the England and Wales combined, followed by Table 49 and Table 50 which show results by WaSCs and WoCs in turn.

Figure 47: Aware of water campaigns



Table 49: Aware of water campaigns – WaSCs

Yes aware	%
Industry (2023 base sample: 4,952)	55%
Total WaSCs (2023 base sample: 3,417)	54%
Anglian Water (2023 base sample: 200)	64%
Dŵr Cymru Welsh Water (2023 base sample: 400)	51%
Hafren Dyfrdwy (2023 base sample: 200)	50%
Northumbrian Water (2023 base sample: 201)	38%
Severn Trent (2023 base sample: 200)	53%
South West Water (2023 base sample: 400)	77%
Southern Water (2023 base sample: 400)	65%
Thames Water (2023 base sample: 200)	50%
United Utilities (2023 base sample: 700)	50%
Wessex Water (2023 base sample: 200)	63%
Yorkshire Water (2023 base sample: 400)	51%

Table 50: Aware of water campaigns – WoCs

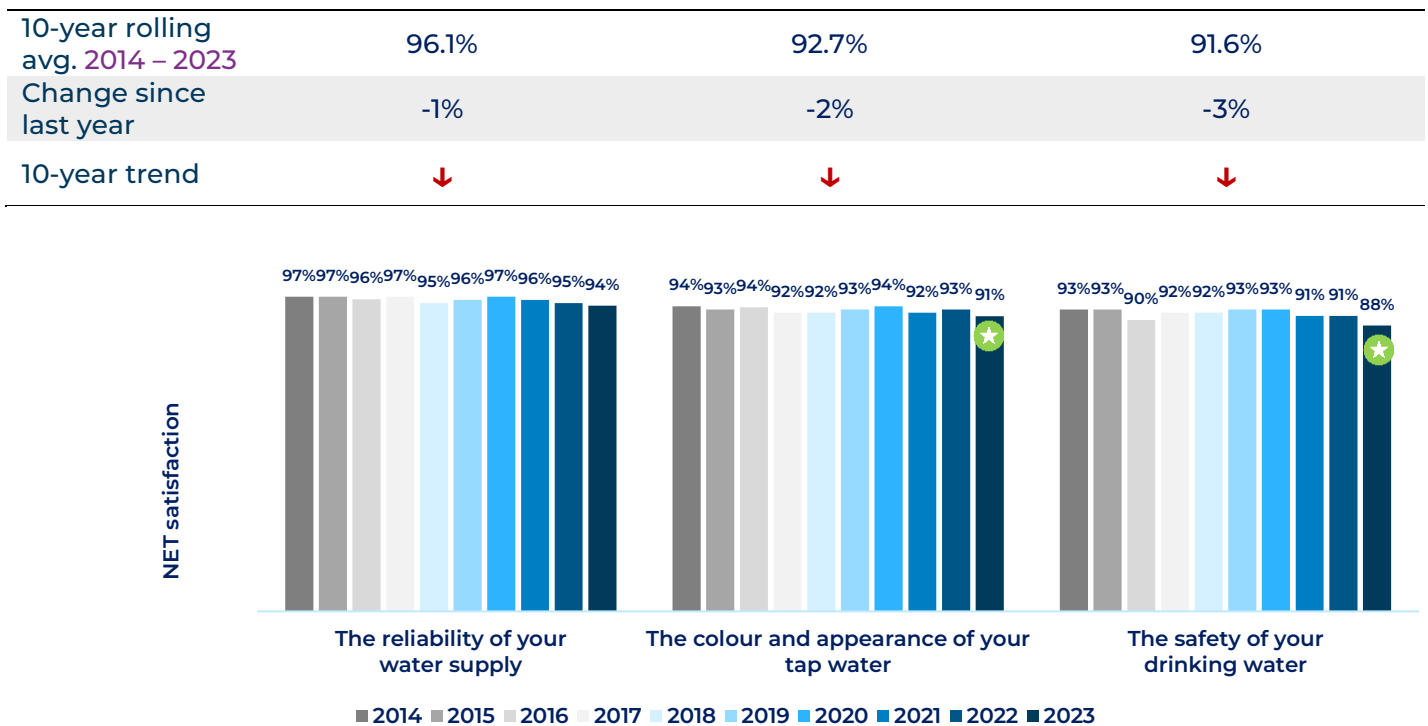
Yes aware	%
Industry (2023 base sample: 4,952)	55%
Total WoCs (2023 base sample: 1,535)	60%
Affinity Water (2023 base sample: 250)	66%
Bristol Water (2023 base sample: 300)	58%
Cambridge Water (2023 base sample: 151)	60%
Essex & Suffolk Water (2023 base sample: 150)	43%
Portsmouth Water (2023 base sample: 150)	65%
South East Water (2023 base sample: 150)	72%
South Staffs Water (2023 base sample: 150)	47%
SES Water (2023 base sample: 150)	61%

3.5 Satisfaction with aspects of water supply

Figure 48 and Figure 49 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 50 which compares satisfaction between England and Wales in 2022, Table 51 and Table 52 which show satisfaction in 2022 for each WaSC and WoC respectively, and finally Table 53 and Table 54 which highlight the ten-year trends for WaSCs and WoCs.

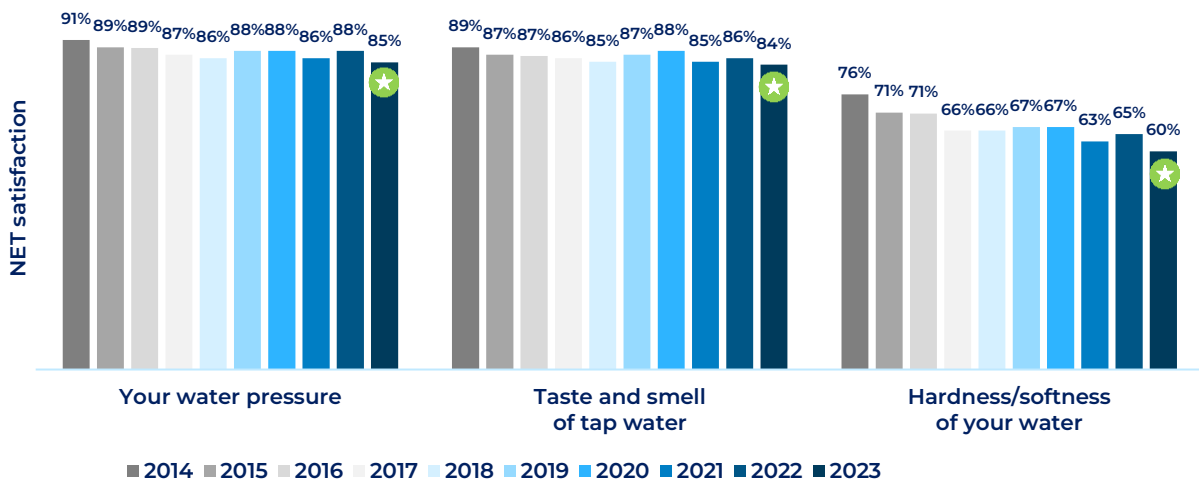
Figure 48: Satisfaction with aspects of water supply



★ Significant difference between 2022-2023 data for Colour and appearance of tap water and Safety of drinking water

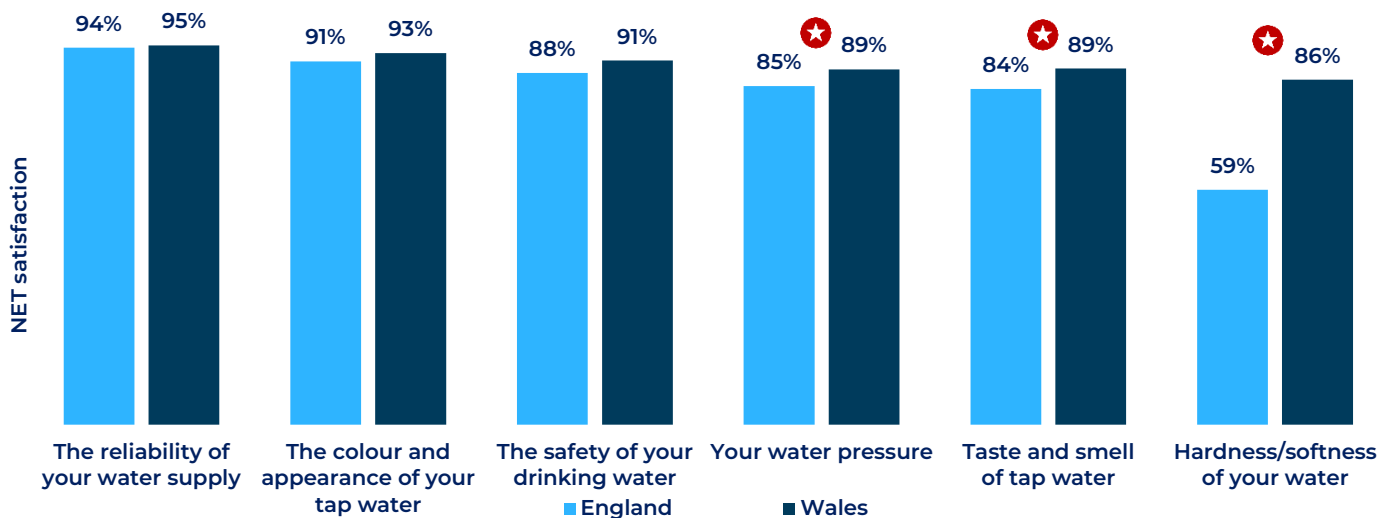
Figure 49: Satisfaction with aspects of water supply

10-year rolling avg. 2014 – 2023	87.6%	86.5%	67.2%
Change since last year	-3%	-2%	-5%
10-year trend	↓	↓	↓



★ Significant difference between 2022-2023 data for Water pressure, Taste and smell of tap water and Hardness/softness of water

Figure 50: Satisfaction with aspects of water supply by nation



★ Significant difference between England & Wales 2023 for Water pressure, Taste and smell of tap water and Hardness/softness of water

Table 51: Satisfaction with aspects of water supply in 2023 – WaSCs

Satisfaction with aspects of water supply (2023 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 (2023 base sample: 4,952)	94%	91%	88%	85%	84%	60%
Total WaSCs (2023 base sample: 3,417)	94%	91%	88%	85%	84%	64%
Anglian Water (2023 base sample: 200)	96%	94%	95%	87%	90%	45%
Dŵr Cymru Welsh Water (2023 base sample: 400)	95%	93%	91%	89%	89%	87%
Hafren Dyfrdwy (2023 base sample: 200)	92%	89%	88%	86%	85%	81%
Northumbrian Water (2023 base sample: 201)	96%	93%	88%	94%	87%	78%
Severn Trent (2023 base sample: 200)	93%	92%	88%	86%	82%	68%
South West Water (2023 base sample: 400)	93%	90%	91%	89%	86%	76%
Southern Water (2023 base sample: 400)	91%	90%	87%	85%	82%	48%
Thames Water (2023 base sample: 200)	93%	85%	81%	75%	79%	40%
United Utilities (2023 base sample: 700)	94%	93%	89%	86%	87%	80%
Wessex Water (2023 base sample: 200)	96%	92%	89%	86%	82%	54%
Yorkshire Water (2023 base sample: 400)	97%	93%	92%	90%	86%	76%

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

Table 52: Satisfaction with aspects of water supply 2023 – WoCs

Satisfaction with aspects of water supply (2023 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 (2023 base sample: 4,952)	94%	91%	88%	85%	84%	60%
Total WoCs (2023 base sample: 1,535)	94%	90%	86%	84%	83%	47%
Affinity Water (2023 base sample: 250)	97%	91%	85%	85%	81%	35%
Bristol Water (2023 base sample: 300)	97%	94%	91%	88%	86%	50%
Cambridge Water (2023 base sample: 151)	94%	91%	85%	87%	80%	41%
Essex & Suffolk Water (2023 base sample: 150)	95%	91%	88%	81%	84%	42%
Portsmouth Water (2023 base sample: 150)	96%	93%	86%	87%	86%	44%
South East Water (2023 base sample: 150)	86%	90%	86%	81%	81%	54%
South Staffs Water (2023 base sample: 150)	93%	83%	80%	87%	84%	63%
SES Water (2023 base sample: 150)	98%	93%	93%	86%	88%	61%

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

Table 53: Satisfaction with aspects of water supply – WaSC ten-year trends (arrows) and ten-year rolling averages (figures)

Satisfaction with aspects of water supply (2023 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 (2023 base sample: 4,952)	96.1% ↓	92.7% ↓	91.6% ↓	87.6% ↓	86.5% ↓	67.2% ↓
Total WaSCs (2023 base sample: 3,417)	96.0% ↓	92.8% ↓	91.8% ↓	87.7% ↓	86.7% ↓	70.6% ↓
Anglian Water (2023 base sample: 200)	96.0% ↔	92.9% ↔	91.9% ↔	87.2% ↓	85.7% ↔	51.7% ↓
Dŵr Cymru Welsh Water (2023 base sample: 400)	97.2% ↓	95.1% ↓	95.2% ↓	90.8% ↔	91.6% ↓	92.1% ↓
Hafren Dyfrdwy (2023 base sample: 200)	96.7% ↓	94.1% ↔	93.3% ↓	88.9% ↓	90.8% ↔	88.9% ↓
Northumbrian Water (2023 base sample: 201)	98.2% ↔	95.1% ↔	93.7% ↓	92.5% ↔	89.7% ↓	85.4% ↓

Satisfaction with aspects of water supply (2023 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
Severn Trent (2023 base sample: 200)	96.4% ↓	92.6% ↔	92.6% ↔	88.9% ↓	86.1% ↔	73.9% ↓
South West Water (2023 base sample: 400)	96.1% ↔	93.3% ↔	92.7% ↔	90.1% ↓	86.2% ↔	85.1% ↓
Southern Water (2023 base sample: 400)	95.4% ↓	91.3% ↓	90.6% ↓	88.1% ↓	85.6% ↓	54.8% ↓
Thames Water (2023 base sample: 200)	93.7% ↓	89.9% ↔	87.0% ↔	82.4% ↔	81.9% ↔	48.9% ↓
United Utilities (2023 base sample: 700)	95.9% ↓	93.5% ↓	92.1% ↔	87.4% ↔	88.2% ↓	86.2% ↓
Wessex Water (2023 base sample: 200)	96.9% ↓	93.6% ↔	92.8% ↔	89.1% ↔	86.7% ↓	59.4% ↓
Yorkshire Water (2023 base sample: 400)	97.3% ↓	94.6% ↓	94.7% ↔	89.7% ↓	90.4% ↔	81.2% ↓

Table 54: Satisfaction with aspects of water supply – WoC ten-year trends (arrows) and ten-year rolling averages (figures)

Satisfaction with aspects of water supply (2023 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 (2023 base sample: 4,952)	96.1% ↓	92.7% ↓	91.6% ↓	87.6% ↓	86.5% ↓	67.2% ↓
Total WoCs (2023 base sample: 1,535)	96.5% ↓	92.2% ↔	90.9% ↔	87.2% ↓	85.6% ↔	55.0% ↓
Affinity Water (2023 base sample: 250)	96.6% ↔	91.8% ↔	89.1% ↔	86.0% ↔	83.1% ↔	44.9% ↓
Bristol Water (2023 base sample: 300)	97.8% ↔	93.9% ↔	92.6% ↔	89.3% ↔	87.3% ↔	60.5% ↓
Cambridge Water (2023 base sample: 151)	97.0% ↔	94.5% ↔	93.6% ↓	90.5% ↔	87.3% ↔	51.5% ↓
Essex & Suffolk Water (2023 base sample: 150)	96.8% ↔	92.1% ↓	90.3% ↔	86.4% ↓	86.6% ↓	51.5% ↓
Portsmouth Water (2023 base sample: 150)	97.7% ↔	93.9% ↔	92.3% ↔	88.0% ↓	88.0% ↓	54.7% ↓
South East Water (2023 base sample: 150)	94.5% ↓	90.5% ↑	90.4% ↓	86.3% ↓	83.1% ↔	56.0% ↓
South Staffs Water (2023 base sample: 150)	96.1% ↔	91.2% ↔	90.5% ↓	88.5% ↔	85.0% ↔	70.0% ↓
SES Water (2023 base sample: 150)	97.6% ↔	94.8% ↓	94.6% ↔	87.2% ↓	92.3% ↓	64.5% ↓

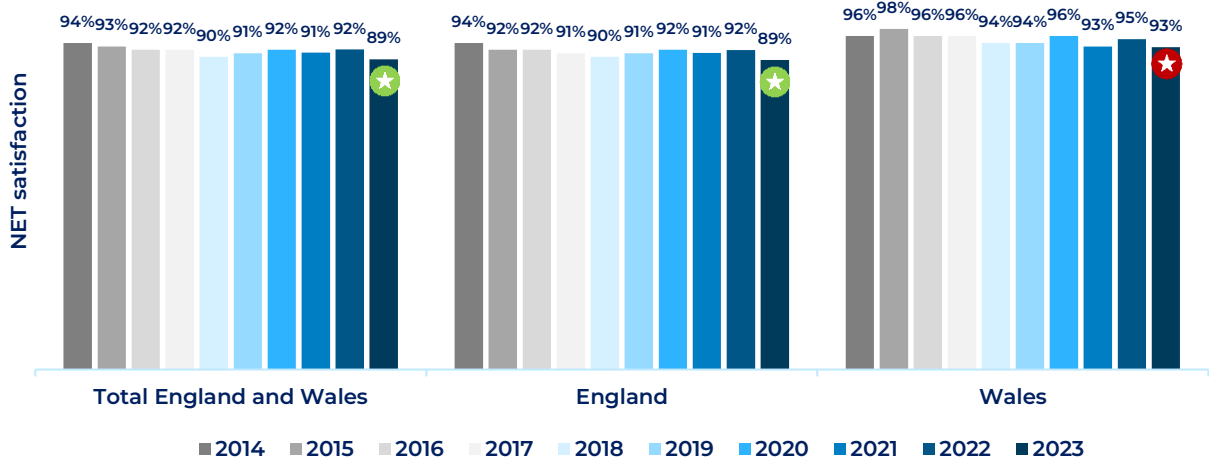
3.6 Overall satisfaction with water supply

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

Figure 51 shows ten-year satisfaction trends for England and Wales, and for England and for Wales individually. This is followed Table 55 and Table 56 which show satisfaction trends for WaSCs and for WoCs in turn.

Figure 51: Overall satisfaction with water supply

10-year rolling avg. 2014 – 2023	91.6%	91.4%	95.0%
Change since last year	-3%	-3%	-2%
10-year trend	↓	↓	↓



- ★ Significant difference between 2022-2023 data in England and in Total
- ★ Significant difference between England & Wales 2023

Table 55: Overall satisfaction with water supply – WaSCs

Satisfaction with water supply	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
Industry (2023 base sample: 4,952)	91.6%	<p>94% 93% 92% 92% 90% 91% 92% 91% 92% 89%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	n/a	-3%
Total WaSCs (2023 base sample: 3,417)	91.6%	<p>94% 92% 93% 91% 90% 91% 92% 91% 92% 89%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	89%	-2%
Anglian Water (2023 base sample: 200)	91.6%	<p>93% 91% 92% 94% 87% 88% 91% 94% 91% 94%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	+3%
Dŵr Cymru Welsh Water (2023 base sample: 400)	95.1%	<p>95% 99% 96% 96% 94% 94% 96% 93% 95% 93%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↑	-2%
Hafren Dyfrdwy (2023 base sample: 200)	93.1%	<p>93% 92% 94% 97% 93% 91%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-2%
Northumbrian Water (2023 base sample: 201)	94.8%	<p>95% 94% 97% 95% 92% 93% 96% 93% 98% 96%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-3%
Severn Trent (2023 base sample: 200)	92.8%	<p>94% 94% 95% 92% 91% 94% 92% 95% 94% 88%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-6%
South West Water (2023 base sample: 400)	92.5%	<p>93% 93% 93% 94% 90% 93% 90% 93% 94% 91%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-3%
Southern Water (2023 base sample: 400)	89.0%	<p>92% 87% 91% 86% 88% 89% 91% 90% 90% 88%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-2%
Thames Water (2023 base sample: 200)	86.5%	<p>93% 89% 88% 86% 84% 87% 87% 86% 83% 82%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↓	-1%

Satisfaction with water supply	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WaSC average	Change since last year
United Utilities (2023 base sample: 700)	92.5%	<p>94% 92% 95% 92% 90% 93% 94% 89% 94% 91%</p> <p>Year</p>	↔	↔	-3%
Wessex Water (2023 base sample: 200)	92.5%	<p>95% 93% 91% 91% 91% 93% 95% 93% 94% 90%</p> <p>Year</p>	↔	↔	-5%
Yorkshire Water (2023 base sample: 400)	94.1%	<p>96% 95% 93% 94% 95% 94% 94% 92% 96% 92%</p> <p>Year</p>	↔	↔	-3%

Table 56: Overall satisfaction with water supply – WoCs

Satisfaction with water supply	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Industry (2023 base sample: 4,952)	91.6%	<p>94% 93% 92% 92% 90% 91% 92% 91% 92% 89%</p> <p>Year</p>	↓	n/a	-3%
Total WoCs (2023 base sample: 1,535)	91.8%	<p>93% 93% 91% 92% 91% 91% 93% 91% 93% 89%</p> <p>Year</p>	↓	89%	-4%
Affinity Water (2023 base sample: 250)	91.3%	<p>95% 92% 90% 91% 86% 90% 94% 92% 92% 91%</p> <p>Year</p>	↔	↔	-1%
Bristol Water (2023 base sample: 300)	93.7%	<p>94% 95% 89% 95% 97% 94% 93% 92% 95% 95%</p> <p>Year</p>	↔	↑	0%
Cambridge Water (2023 base sample: 151)	93.7%	<p>94% 93% 98% 95% 96% 96% 92% 92% 93% 89%</p> <p>Year</p>	↓	↔	-3%
Essex & Suffolk Water (2023 base sample: 150)	91.7%	<p>91% 92% 93% 89% 91% 91% 91% 91% 96% 89%</p> <p>Year</p>	↔	↔	-7%

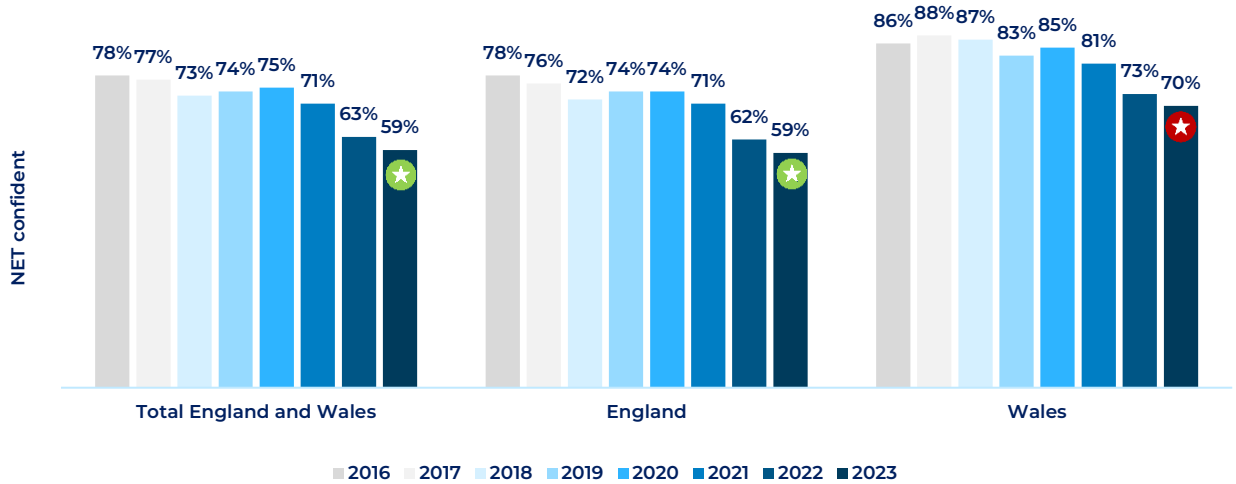
Satisfaction with water supply	Ten-year rolling company average	Ten-year company trend	Ten-year trend	Company average vs WoC average	Change since last year
Portsmouth Water (2023 base sample: 150)	94.2%	<p>94% 95% 93% 95% 91% 96% 93% 95% 97% 95%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↑	-2%
South East Water (2023 base sample: 150)	88.8%	<p>91% 90% 87% 91% 93% 86% 93% 90% 89% 79%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↓	-10%
South Staffs Water (2023 base sample: 150)	92.1%	<p>93% 98% 93% 93% 89% 93% 95% 87% 93% 87%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↓	↔	-5%
SES Water (2023 base sample: 150)	94.0%	<p>96% 94% 94% 93% 91% 95% 94% 91% 97% 94%</p> <p>14 15 16 17 18 19 20 21 22 23</p> <p>Year</p>	↔	↔	-3%

3.7 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 52. This is followed by Table 57 and Table 58 which shows perceptions by WaSC and then by WoC.

Figure 52: Confidence in the long-term supply of water

8-year rolling avg. 2016 – 2023	71.2%	70.5%	81.7%
Change since last year	-3%	-3%	-3%
8-year trend	↓	↓	↓



★ Significant difference between 2022-2023 data in England and in Total

★ Significant difference between England & Wales 2023

Table 57: Confidence in the long-term supply of water – WaSCs

Confidence in the long-term supply of water	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
Industry (2023 base sample: 4,952)	71.2%	<table border="1"> <caption>Industry Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>78%</td></tr> <tr><td>17</td><td>77%</td></tr> <tr><td>18</td><td>73%</td></tr> <tr><td>19</td><td>74%</td></tr> <tr><td>20</td><td>75%</td></tr> <tr><td>21</td><td>71%</td></tr> <tr><td>22</td><td>63%</td></tr> <tr><td>23</td><td>59%</td></tr> </tbody> </table>	Year	Confidence (%)	16	78%	17	77%	18	73%	19	74%	20	75%	21	71%	22	63%	23	59%	↓	n/a	-3%
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Total WaSCs (2023 base sample: 3,417)	72.4%	<table border="1"> <caption>Total WaSCs Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>80%</td></tr> <tr><td>17</td><td>77%</td></tr> <tr><td>18</td><td>74%</td></tr> <tr><td>19</td><td>76%</td></tr> <tr><td>20</td><td>76%</td></tr> <tr><td>21</td><td>73%</td></tr> <tr><td>22</td><td>64%</td></tr> <tr><td>23</td><td>60%</td></tr> </tbody> </table>	Year	Confidence (%)	16	80%	17	77%	18	74%	19	76%	20	76%	21	73%	22	64%	23	60%	↓	60%	-3%
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Dŵr Cymru Welsh Water (2023 base sample: 400)	81.7%	<table border="1"> <caption>Dŵr Cymru Welsh Water Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>86%</td></tr> <tr><td>17</td><td>88%</td></tr> <tr><td>18</td><td>87%</td></tr> <tr><td>19</td><td>83%</td></tr> <tr><td>20</td><td>85%</td></tr> <tr><td>21</td><td>81%</td></tr> <tr><td>22</td><td>73%</td></tr> <tr><td>23</td><td>70%</td></tr> </tbody> </table>	Year	Confidence (%)	16	86%	17	88%	18	87%	19	83%	20	85%	21	81%	22	73%	23	70%	↓	↑	-3%
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Confidence in the long-term supply of water	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
United Utilities (2023 base sample: 700)	73.8%	<table border="1"> <caption>United Utilities Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>81%</td></tr> <tr><td>17</td><td>79%</td></tr> <tr><td>18</td><td>71%</td></tr> <tr><td>19</td><td>78%</td></tr> <tr><td>20</td><td>74%</td></tr> <tr><td>21</td><td>72%</td></tr> <tr><td>22</td><td>69%</td></tr> <tr><td>23</td><td>67%</td></tr> </tbody> </table>	Year	Confidence (%)	16	81%	17	79%	18	71%	19	78%	20	74%	21	72%	22	69%	23	67%	↓	↑	-2%
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Table 58: Confidence in the long-term supply of water – WoCs

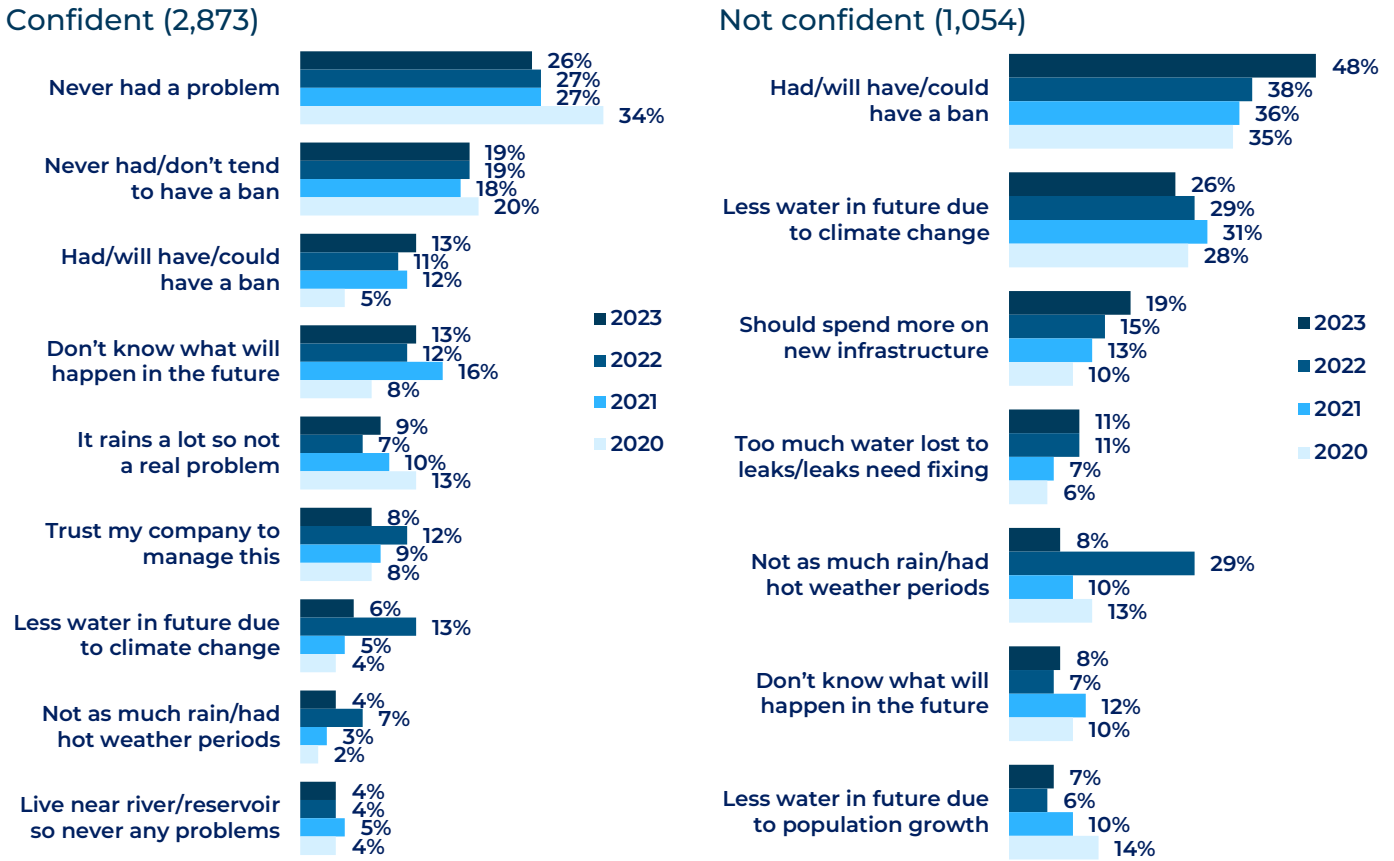
Confidence in the long-term supply of water	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
Industry (2023 base sample: 4,952)	71.2%	<table border="1"> <caption>Industry Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>78%</td></tr> <tr><td>17</td><td>77%</td></tr> <tr><td>18</td><td>73%</td></tr> <tr><td>19</td><td>74%</td></tr> <tr><td>20</td><td>75%</td></tr> <tr><td>21</td><td>71%</td></tr> <tr><td>22</td><td>63%</td></tr> <tr><td>23</td><td>59%</td></tr> </tbody> </table>	Year	Confidence (%)	16	78%	17	77%	18	73%	19	74%	20	75%	21	71%	22	63%	23	59%	↓	n/a	-3%
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Total WoCs (2023 base sample: 1,535)	66.7%	<table border="1"> <caption>Total WoCs Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>72%</td></tr> <tr><td>17</td><td>73%</td></tr> <tr><td>18</td><td>69%</td></tr> <tr><td>19</td><td>69%</td></tr> <tr><td>20</td><td>71%</td></tr> <tr><td>21</td><td>63%</td></tr> <tr><td>22</td><td>60%</td></tr> <tr><td>23</td><td>56%</td></tr> </tbody> </table>	Year	Confidence (%)	16	72%	17	73%	18	69%	19	69%	20	71%	21	63%	22	60%	23	56%	↓	56%	-4%
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Affinity Water (2023 base sample: 250)	62.8%	<table border="1"> <caption>Affinity Water Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>68%</td></tr> <tr><td>17</td><td>70%</td></tr> <tr><td>18</td><td>62%</td></tr> <tr><td>19</td><td>63%</td></tr> <tr><td>20</td><td>67%</td></tr> <tr><td>21</td><td>62%</td></tr> <tr><td>22</td><td>58%</td></tr> <tr><td>23</td><td>53%</td></tr> </tbody> </table>	Year	Confidence (%)	16	68%	17	70%	18	62%	19	63%	20	67%	21	62%	22	58%	23	53%	↓	↔	-4%
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Bristol Water (2023 base sample: 300)	73.2%	<table border="1"> <caption>Bristol Water Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>70%</td></tr> <tr><td>17</td><td>80%</td></tr> <tr><td>18</td><td>79%</td></tr> <tr><td>19</td><td>81%</td></tr> <tr><td>20</td><td>74%</td></tr> <tr><td>21</td><td>68%</td></tr> <tr><td>22</td><td>69%</td></tr> <tr><td>23</td><td>67%</td></tr> </tbody> </table>	Year	Confidence (%)	16	70%	17	80%	18	79%	19	81%	20	74%	21	68%	22	69%	23	67%	↔	↑	-2%
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Cambridge Water (2023 base sample: 151)	64.8%	<table border="1"> <caption>Cambridge Water Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>79%</td></tr> <tr><td>17</td><td>82%</td></tr> <tr><td>18</td><td>71%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>59%</td></tr> <tr><td>21</td><td>61%</td></tr> <tr><td>22</td><td>57%</td></tr> <tr><td>23</td><td>44%</td></tr> </tbody> </table>	Year	Confidence (%)	16	79%	17	82%	18	71%	19	68%	20	59%	21	61%	22	57%	23	44%	↓	↓	-12%
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Essex & Suffolk Water (2023 base sample: 150)	71.3%	<table border="1"> <caption>Essex & Suffolk Water Confidence Data</caption> <thead> <tr><th>Year</th><th>Confidence (%)</th></tr> </thead> <tbody> <tr><td>16</td><td>76%</td></tr> <tr><td>17</td><td>73%</td></tr> <tr><td>18</td><td>76%</td></tr> <tr><td>19</td><td>74%</td></tr> <tr><td>20</td><td>78%</td></tr> <tr><td>21</td><td>66%</td></tr> <tr><td>22</td><td>67%</td></tr> <tr><td>23</td><td>62%</td></tr> </tbody> </table>	Year	Confidence (%)	16	76%	17	73%	18	76%	19	74%	20	78%	21	66%	22	67%	23	62%	↓	↔	-5%
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Confidence in the long-term supply of water	Eight-year rolling company average	Eight-year company trend	Eight-year trend	Company average vs WaSC average	Change since last year																		
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South East Water (2023 base sample: 150)	56.4%	<table border="1"> <caption>South East Water Confidence Data</caption> <thead> <tr> <th>Year</th> <th>Confidence (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>69%</td></tr> <tr><td>17</td><td>64%</td></tr> <tr><td>18</td><td>63%</td></tr> <tr><td>19</td><td>59%</td></tr> <tr><td>20</td><td>65%</td></tr> <tr><td>21</td><td>50%</td></tr> <tr><td>22</td><td>43%</td></tr> <tr><td>23</td><td>38%</td></tr> </tbody> </table>	Year	Confidence (%)	16	69%	17	64%	18	63%	19	59%	20	65%	21	50%	22	43%	23	38%	↓	↓	-5%
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SES Water (2023 base sample: 150)	62.4%	<table border="1"> <caption>SES Water Confidence Data</caption> <thead> <tr> <th>Year</th> <th>Confidence (%)</th> </tr> </thead> <tbody> <tr><td>16</td><td>66%</td></tr> <tr><td>17</td><td>68%</td></tr> <tr><td>18</td><td>60%</td></tr> <tr><td>19</td><td>68%</td></tr> <tr><td>20</td><td>64%</td></tr> <tr><td>21</td><td>63%</td></tr> <tr><td>22</td><td>58%</td></tr> <tr><td>23</td><td>52%</td></tr> </tbody> </table>	Year	Confidence (%)	16	66%	17	68%	18	60%	19	68%	20	64%	21	63%	22	58%	23	52%	↓	↔	-6%
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3.8 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 53.

Figure 53: Reasons for confidence / lack of confidence



Appendices

A1. Sample profile – 2023

		Unweighted No.	Unweighted %	Weighted No.	Weighted %
Gender ²⁶	Male	2,202	44%	2,201	44%
	Female	2,750	56%	2,751	56%
Age	18-29	109	2%	145	3%
	30-44	694	14%	858	17%
	45-59	1,492	30%	1,489	30%
	60-74	1,664	34%	1,549	31%
	75+	993	20%	910	18%
SEC	Higher managerial, admin & professional occupations	2,344	47%	2,373	48%
	Intermediate Occupations	1114	22%	1,121	23%
	Routine & manual occupations	1,041	21%	990	20%
	Long term unemployed/ student	362	7%	377	8%
	Refused	91	2%	91	2%
House Composition	With children	949	19%	1,037	21%
	Without children	3,936	79%	3,835	77%
Ethnicity	White	4,480	92%	4,332	89%
	Mixed	54	1%	96	2%
	Asian	115	2%	190	4%
	Black	74	2%	127	3%
	Other	121	2%	98	2%
Disability	Yes	1,444	29%	1,598	32%
	No	3,434	70%	3,479	70%
Retired	Yes	2,365	57%	2,185	55%
	No	1,752	42%	1,731	44%
Accommodation	Owner occupied	4,075	82%	3,923	79%
	Private rental	328	7%	405	8%
	Council tenant	209	4%	238	5%
	Housing Association tenant	209	4%	252	5%
	Leaseholder	23	<1%	27	1%

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

		Unweighted No.	Unweighted %	Weighted No.	Weighted %
Meter in household	Yes	3,031	62%	3,016	62%
	No	1,843	38%	1,864	38%
Meter fitting (where meter present)	Already fitted	1,545	51%	1,578	52%
	Requested fitting	939	31%	879	29%
	Fitted as part of a metering scheme	478	16%	490	16%
Income	Up to £199 a week/Up to £10399 a year	228	5%	221	4%
	From £200 to £299 a week/ From £10400 to £15599 a year	437	9%	446	9%
	From £300 to £499 a week/ From £15600 to £25999 a year	674	14%	680	14%
	From £500 to £699/From £26000 to £36399 a year	622	13%	630	13%
	From £700 to £999 a week/ From £36400 to £51999 a year	602	12%	637	13%
	From £1000 to £1399 a week/ From £52000 to £72799 a year	493	10%	512	10%
	From £1400 to £1999 a week/ From £72800 to £103999 a year	367	7%	407	8%
	£2000 and above a week/ £104000 and above a year	243	5%	252	5%
Receive benefits	Yes	948	19%	994	20%
	No	3,832	77%	3,797	77%
Urbanicity	Urban	1,521	31%	1,688	34%
	Rural	1,530	31%	1,399	28%
	Suburban/semi-rural	1,806	36%	1,761	36%

A2. Questionnaire



©DJS Research Ltd, 3 Pavilion Lane, Strines, Stockport, SK6 7GH
Tel: 01663-767857 – JN 9069 Water Matters 2023

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	
Don't know	85	CLOSE

<p>ASK ALL S4 Do you or any member of your family work in....: READ OUT</p> <p>The water industry i.e. work for a water company A consumer organisation e.g. Passenger Focus, Energy Ombudsman Which?, Citizens Advice Market Research None of the above</p>	<p>1 2 3 4 87</p>	<p>Thank and close D1</p>
<p>ASK ALL D1 Please record the gender of the respondent DO NOT ASK</p> <p>Male Female</p>	<p>1 2</p>	
<p>ASK ALL D2 Can you please tell me your age? PROMPT WITH BANDS IF NECESSARY CODE AGE INTO CORRECT BANDING. SINGLE CODE</p> <p>18-19 20-24 25-29 30-44 45-59 60-64 65-74 75+ Refused</p>	<p>1 2 3 4 5 6 7 8 86</p>	<p>SCREEN OUT</p>
<p>ASK ALL Q1a Who is your water company? (This may be a company which deals with your sewerage too.) SINGLE CODE</p> <p>DO NOT READ OUT COMPANY FROM SAMPLE. IF DOESN'T MATCH, CODE "STATED WATER COMPANY DIFFERS"</p> <p>Anglian Water Services Ltd Dŵr Cymru Cyfyngedig (Welsh Water) Northumbrian Water Ltd Severn Trent Water Ltd South West Water Ltd Southern Water Services Ltd Thames Water Utilities Ltd United Utilities Water Plc Wessex Water Services Ltd Yorkshire Water Services Ltd</p> <p>Water only companies Bournemouth Water Plc Bristol Water Plc Cambridge Water Company Plc Cholderton & District Water Company Ltd Essex & Suffolk Water Affinity Water South East Hartlepool Water Plc (interviewer: may be known as Anglian)</p>	<p>1 2 3 4 5 6 7 8 9 10 11 12 13 14 16 17 18</p>	<p>Q2 Q3 CLOSE</p>

Portsmouth Water Plc	19	Q3
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	24	
Hafren Dyfrydwy	26	Go to Q3
Stated water company differs from sample	25	Go to Q1b
Don't know	85	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?		
Yes	1	GO BACK AND CODE Q1A THEN TO FILTER AT Q2 CLOSE
No	2	
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	1	GO TO Q6 CLOSE GO TO Q6
Have septic tank	2	
Different company provides my sewerage services	3	
Don't know	85	
ASK IF CODES 11-24 or 26 AT Q1a. OTHERS GO TO FILTER AT Q6		
Q3 Do you have a septic tank?		
es	1	Q6
No	2	*
*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	1	Q5a
No	2	Q5b

<p>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</p>		
<p style="text-align: right;">Anglian Water Services Ltd 1 Dŵr Cymru Cyfyngedig (Welsh Water) 2 Northumbrian Water Ltd 3 Severn Trent Water Ltd 4 Southern Water Services Ltd 5 South West Water Ltd 6 Thames Water Utilities Ltd 7 United Utilities Water Plc 8 Wessex Water Services Ltd 9 Yorkshire Water Services Ltd 10 Hafren Dyfrdwy 12 Stated company differs to sample 11 Don't know 85</p>		Q6
<p>Scripting note: If water company is Hafren and sewerage company is not either Hafren or Welsh Water, close.</p>		
<p>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>?</p>		
<p style="text-align: right;">Yes, same as sample 1 Incorrect – Enter correct postcode (first part and first digit of second part) 2</p>		Q5c
<p>Q5c In your area, your sewerage company is likely to be [insert name of water company]. Does that sound right?</p>		
<p style="text-align: right;">Yes 1 No 2</p>		GO BACK & CODE Q5a THEN TO Q6 CLOSE
<p>ASK ALL Q6 Does your household have a water meter? SINGLE CODE</p>		
<p style="text-align: right;">Yes 1 No 2 Don't know 85</p>		

Company Information

<p>ASK ALL</p> <p>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</p> <p>DO NOT ASK IF CODE 2 AT Q2 OR 1 AT Q3 (HAVE SEPTIC TANK)</p> <p>Q10 And the sewerage services in your area?</p> <p style="text-align: right;">Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know</p>	<p>1 2 3 4 5 85</p>	
<p>ASK ALL</p> <p>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</p> <p style="text-align: right;">Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know</p>	<p>1 2 3 4 5 85</p>	
<p>Q15 PARKED 2018</p>		
<p>ASK ALL</p> <p>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</p> <p style="text-align: right;">Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know</p>	<p>1 2 3 4 5 85</p>	
<p>Q16e Has your household's financial situation changed since last year? Would you say that your household finances are...? SINGLE CODE. READ OUT</p> <p style="text-align: right;">Slightly worse Significantly worse Slightly better Significantly better Unchanged Don't know</p>		

Section B: Consumer Rights and Responsibility

<p>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</p> <p style="text-align: right;">Very likely Fairly likely Not very likely Not at all likely Don't know</p>	<p style="text-align: center;">1 2 3 4 85</p>	
<p>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</p> <p style="text-align: right;">Your property already had meter when moved in You asked for a meter to be fitted Had no choice - water company fitted one as part of a metering scheme Other (specify) Don't know</p>	<p style="text-align: center;">1 2 3 80 85</p>	
<p>ASK ALL Q020a 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?</p> <p style="text-align: right;">Yes No Don't know</p>	<p style="text-align: center;">1 2 85</p>	
<p><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</p> <p>Q20 Were you aware that ...: SINGLE CODE FOR EACH STATEMENT Scale: 1=Yes, 2= No, 85= Don't know</p> <p>a) If you ask for a meter to be fitted, your water company will install one free of charge</p> <p>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</p>		<p style="text-align: center;">WILL BE ROUTED FROM POST- CODE</p>
<p>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>		

<p>ASK ALL 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 READ OUT. SINGLE CODE</p> <p style="text-align: right;">Yes, have heard of it but do not need it 1 Yes, have subscribed to it 2 No, but would like to know more 3 No, but do not need it 4 Don't know 85</p>		
<p>ASK ALL 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 style="text-align: right;">Yes, have heard of it but do not need it 1 Yes, have subscribed to it 2 No, but would like to know more 3 No, but do not need it 4 Don't know 85</p>		
<p>ASK ALL Q28 Have you contacted your water / water and sewerage company in the past 12 months? SINGLE CODE INTERVIEWER PLEASE CONFIRM</p> <p style="text-align: right;">Yes – water and sewerage company 1 Yes – water company 2 Yes – sewerage company 3 No 4 Don't know 85</p>		<p style="text-align: center;">Q29 Q33a</p>

<p>ASK IF YES AT Q28 (CODES 1-3). Q29 What was your most recent contact about? DO NOT READ OUT. MULTICODE OK</p> <p style="text-align: right;">To make a complaint 1</p> <p style="text-align: right;">To make an enquiry relating to drought/water shortage 2</p> <p style="text-align: right;">To make an enquiry relating to flooding 3</p> <p style="text-align: right;">To make an enquiry about sewers and drains (responsibility) 4</p> <p style="text-align: right;">General billing enquiry 5</p> <p style="text-align: right;">Billing enquiry 6</p> <p style="text-align: right;">No supply/supply issue 7</p> <p style="text-align: right;">To report a leak 8</p> <p style="text-align: right;">To ask for a water meter 9</p> <p style="text-align: right;">Water quality 10</p> <p style="text-align: right;">Water pressure 11</p> <p style="text-align: right;">Sewerage problem 12</p> <p style="text-align: right;">Been told I will have to have a water meter (no choice) 13</p> <p style="text-align: right;">To enquire about hosepipe ban 14</p> <p style="text-align: right;">To ask about help with paying bills for people who are behind with payments 15</p> <p style="text-align: right;">To say I've moved house 16</p> <p style="text-align: right;">To ask about help with paying bills (not behind with payments) 17</p> <p style="text-align: right;">Other (please specify) 80</p> <p style="text-align: right;">Don't know 85</p>		
Q32 AND Q33a-c PARKED		
<p>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</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> <p>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</p>		
<p>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</p> <p style="text-align: right;">Very satisfied 1</p> <p style="text-align: right;">Fairly satisfied 2</p> <p style="text-align: right;">Neither satisfied nor dissatisfied 3</p> <p style="text-align: right;">Fairly dissatisfied 4</p> <p style="text-align: right;">Very dissatisfied 5</p> <p style="text-align: right;">Don't know 85</p>		

<p>ASK ALL</p> <p>NQ3a 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 style="text-align: right;">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</p> <p>NQ3b2021 Why do you say that? DO NOT READ OUT. MULTICODE</p> <p style="text-align: right;">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 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</p> <p>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 style="text-align: right;">Very satisfied 1 Fairly satisfied 2 Neither satisfied nor dissatisfied 3 Fairly dissatisfied 4 Very dissatisfied 5 Don't know 85</p>		

ASK IF NQ1a=4/5 NQ1b Why do you say that you are dissatisfied with the customer service? DO NOT PROMPT. RECORD VERBATIM AND MULTI-CODE FROM LIST BELOW. PROBE FULLY.		
Lack of communication/information	1	
Unhelpful response/didn't resolve	2	
Billing problems	3	
Poor value for money/too costly	4	
Meter reading problems	5	
Takes too long to deal with issues	6	
Issues are outstanding/ongoing	7	
Payment problems, inc. direct debit	8	
They don't listen/we get ignored	9	
Having no choice about water meter	10	
Meter installation problems	11	
Other (please specify)	80	
Don't know	85	

Section C: Water on Tap

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 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.		
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 Q110 Would you recommend your water company to someone else?		
Yes	1	
No	2	
Q101-Q105 PARKED 2023		
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	

<p>ASK ALL</p> <p>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?</p> <p>SINGLE CODE. READ OUT IF NECESSARY</p> <p style="text-align: right;">Very confident 1 Fairly confident 2 Neither confident nor unconfident 3 Fairly unconfident 4 Very unconfident 5 Don't know 85</p>		
<p>ASK IF NQ2/1-5</p> <p>NQ2b Why do you say that? DO NOT READ OUT. MULTICODE</p> <p style="text-align: right;">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 Don't know what will happen in the future 16 Never had/don't tend to have a ban 17 Had/will have/could have a ban 18 Not as much rain/had periods of hot weather 19 We will adapt to use less water 20 Company is already educating people to save water 21 Other (please specify) 80 Don't know 85</p>		
<p>ASK ALL</p> <p>Q106 What are your perceptions regarding the amount of water available in your local area? SINGLE CODE. READ OUT.</p> <p style="text-align: right;">Plenty of water available 1 Moderate levels of water available 2 No spare water available but no shortage either 3 Under a bit of pressure to find water 4 Under serious pressure to find water 5</p>		

<p>ASK ALL</p> <p>Q111 In general, what actions have you and your household taken to reduce your use of water? DO NOT PROMPT. PROBE FULLY. MULTI CODE.</p> <p>Having a water meter installed 1</p> <p>Taking showers instead of baths 2</p> <p>Water efficient shower/showerhead 3</p> <p>Energy & Water efficient dishwasher 4</p> <p>Energy & Water efficient washing machine 5</p> <p>Trigger device fitted to hosepipe 6</p> <p>Hippo/Save A Flush device in toilet cistern 7</p> <p>Lag pipes to protect against bursting 8</p> <p>Water butts in garden 9</p> <p>Turn off tap when brushing teeth 10</p> <p>Wait until full load for Washing Machine / dishwasher 11</p> <p>Only put required amount in kettle 12</p> <p>Reusing water e.g. bath water 13</p> <p>Share shower/bath 14</p> <p>Spending less time in shower 15</p> <p>Other (specify) 80</p> <p>Don't know 85</p> <p>None of these 86</p>		
<p>ASK ALL</p> <p>Q112 Have you made a conscious decision to use less water within the last 12 months? SINGLE CODE. PROBE TO CODE.</p> <p>Yes 1</p> <p>No 2</p> <p>No, but this is because we were already taking action to save water 3</p>		
<p>ASK ALL MAKING A CONSCIOUS DECISION (Q112/1)</p> <p>Q113 Why are you doing things differently? PROBE FULLY.</p> <p>[OPEN RESPONSE]</p>		
<p>ASK ALL</p> <p>Q114 Have you been made aware of any campaigns to use water wisely within the last 12 months? SINGLE CODE</p> <p>Yes 1</p> <p>No 2</p> <p>Don't know 85</p>		

Section D: Keeping it Clean

<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....:</p> <p>READ OUT EACH STATEMENT AND 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> <p>a) Reducing smells from sewage treatment works</p> <p>b) Maintenance of sewerage pipes and treatment works</p> <p>c) Cleaning wastewater properly before releasing it back into the environment</p> <p>d) Minimising sewer flooding</p>		
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<p>ASK IF Q2/1, 85 OR Q3/2 (NO SEPTIC TANK) 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>	
<p>ASK ALL 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? 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 ALL Q11 We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity? SINGLE CODE ONLY</p>	<p>Yes, both gas and electricity 1 No – gas and electricity from separate companies 2 Don't have mains gas 3 Don't know 85</p>	
<p>ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY Q41 Thinking about other household services you receive, how satisfied or dissatisfied are you with...?: READ OUT EACH SERVICE & SINGLE CODE</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> <p>a) Your gas service ASK IF CODE 1-2 AT Q11 b) Your electricity service ASK ALL e) Council services ASK ALL</p>		

<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>ASK ALL</p> <p>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</p>	<p>Strongly agree 1</p> <p>Tend to agree 2</p> <p>Neither agree nor disagree 3</p> <p>Tend to disagree 4</p> <p>Strongly disagree 5</p> <p>Don't know 85</p>	
<p>ASK ALL</p> <p>Q45 How much do you trust your [IF CODE 1 AT Q11 = 'energy'; IF CODE 2 AT Q11 = 'gas or electricity'; IF CODE 3 AT Q11 = 'electricity'] 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</p>	<p>Do not trust them at all 1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>Trust them completely 10</p> <p>Don't know 85</p>	

Environmental behaviours

The next few questions are about environmental behaviours.

<p>ASK ALL</p> <p>Q108 How satisfied or dissatisfied are you with what your water company does to protect the environment? READ OUT IF NECESSARY. SINGLE CODE.</p>	<p>Very satisfied 1</p> <p>Fairly satisfied 2</p> <p>Neither satisfied nor dissatisfied 3</p> <p>Fairly dissatisfied 4</p> <p>Very dissatisfied 5</p> <p>Don't know 85</p>	
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ASK ALL CODES 1, 2, 4 or 5 at Q108 Q109 Why do you say that? [OPEN RESPONSE] Probe to code. 3 reasons needed Don't know	85	
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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

ASK IF CODE 5-8 AT D2. OTHERS GO TO D4a D3 Are you retired? SINGLE CODE		
Yes	1	
No	2	
Refused	86	
D4 PARKED 2022		
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		
Employee	1	D6
Self-employed with employees	2	D7
Self-employed/freelance without employees	3	D9
Not applicable - Long term unemployed/never worked	4	Q1a
Not applicable - Full time student	5	Q1a
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		
1-24	1	
25 or more	2	D8
ASK ALL EMPLOYERS (D5/2) D7 How many people do (did) you employ?		
1-24	1	D8
25 or more	2	
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)		
Yes	1	D9
No	2	
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. Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse		
	1	
	2	

Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive	3	
Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver	4	
Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant	5	
Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff	6	
Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican	7	
Traditional professional occupations such as: accountant – solicitor – medical practitioner – scientist – civil/mechanical engineer	8	
Refused	86	Continue – but will need to screen out once we hit the first refusal quota.
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 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?		
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	
ASK ALL 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		
Yes (self)	1	
Yes (other)	2	
No	3	
Don't know/refused	85	

<p>ASK ALL 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 [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 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 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 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>		
<p>ASK ALL Q60 Would you say you live in an urban or rural area? READ OUT.SINGLE CODE</p> <p>Urban 1 Rural 2 Suburban/semi rural 3 Don't know 85</p>		

<p>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?</p> <p style="text-align: right;">Yes 1 No 2 Don't know 85 Refused 86</p>		
<p>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].</p>		
<p>ASK ALL Q63 Would you be happy to be re-contacted for future research projects on behalf of CCW (Consumer Council for Water)?</p> <p style="text-align: right;">Yes 1 No 2</p>		

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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