



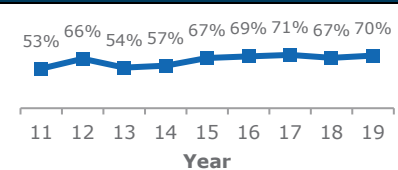
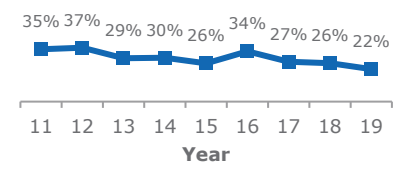
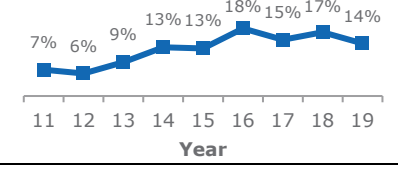
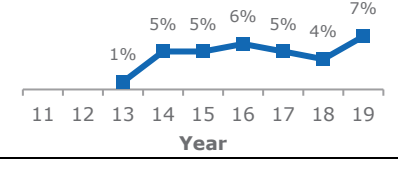
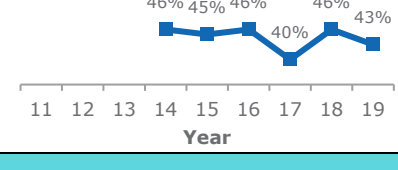
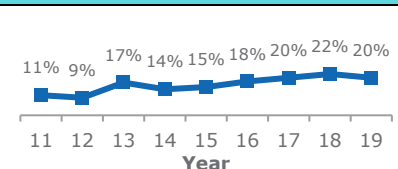
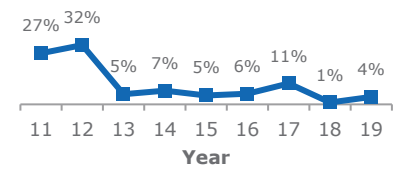
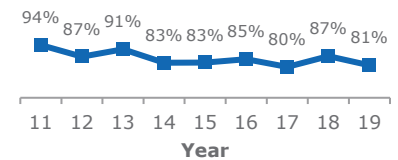
Dŵr Cymru
Welsh Water

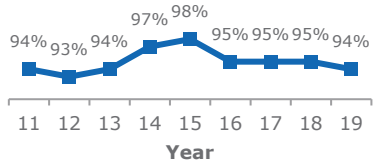
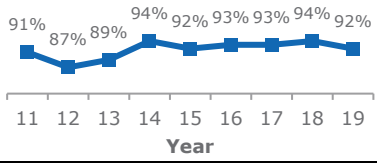
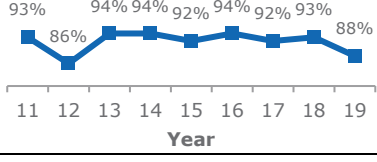
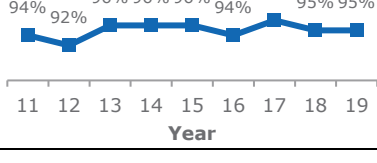
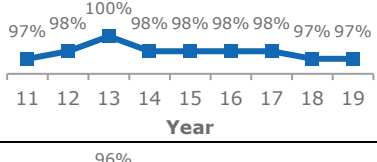
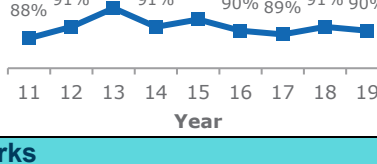
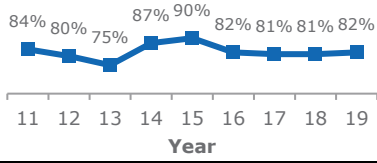
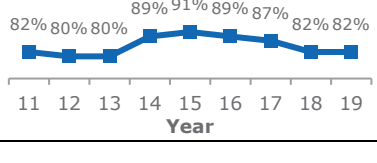
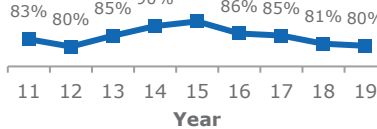
CCW Research Report Water Matters 2019-20

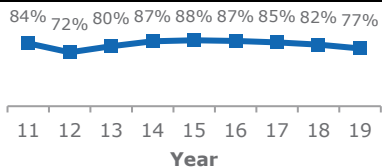
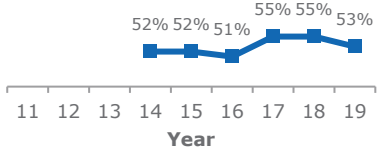
Summary of Research Findings for Dŵr Cymru/Welsh Water



Results for Welsh Water	Percentage of household customers	Range and average for all WASCs ¹	Comments or points of interest																				
Satisfaction with water and sewerage services																							
Overall satisfaction with water supply (Sample size: 400) ²	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>94%</td><td>92%</td><td>96%</td><td>95%</td><td>99%</td><td>96%</td><td>96%</td><td>94%</td><td>94%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	94%	92%	96%	95%	99%	96%	96%	94%	94%	94% to 87% Average: 91%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	94%	92%	96%	95%	99%	96%	96%	94%	94%														
Overall satisfaction with sewerage services (Sample size: 349)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>90%</td><td>85%</td><td>91%</td><td>95%</td><td>96%</td><td>93%</td><td>92%</td><td>90%</td><td>85%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	90%	85%	91%	95%	96%	93%	92%	90%	85%	93% to 79% Average: 86%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	90%	85%	91%	95%	96%	93%	92%	90%	85%														
Satisfaction with value for money																							
Satisfied with value for money of water services (Sample size: 391)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>69%</td><td>74%</td><td>81%</td><td>75%</td><td>82%</td><td>78%</td><td>82%</td><td>82%</td><td>77%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	69%	74%	81%	75%	82%	78%	82%	82%	77%	79% to 65% Average: 76%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	69%	74%	81%	75%	82%	78%	82%	82%	77%														
Satisfied with value for money of sewerage services (Sample size: 352)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>72%</td><td>77%</td><td>83%</td><td>76%</td><td>83%</td><td>81%</td><td>84%</td><td>83%</td><td>79%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	72%	77%	83%	76%	83%	81%	84%	83%	79%	84% to 66% Average: 78%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	72%	77%	83%	76%	83%	81%	84%	83%	79%														
Views on fairness and affordability of charges																							
Agree water and sewerage charges are affordable (Sample size: 393)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>73%</td><td>70%</td><td>70%</td><td>75%</td><td>73%</td><td>78%</td><td>74%</td><td>77%</td><td>74%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	73%	70%	70%	75%	73%	78%	74%	77%	74%	83% to 66% Average: 77%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	73%	70%	70%	75%	73%	78%	74%	77%	74%														
Agree charges are fair (Sample size: 376)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>62%</td><td>65%</td><td>59%</td><td>67%</td><td>63%</td><td>70%</td><td>64%</td><td>71%</td><td>66%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	62%	65%	59%	67%	63%	70%	64%	71%	66%	75% to 50% Average: 66%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	62%	65%	59%	67%	63%	70%	64%	71%	66%														
Care and trust																							
Agree company cares about service given to customers (Sample size: 377)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>70%</td><td>67%</td><td>71%</td><td>78%</td><td>78%</td><td>76%</td><td>79%</td><td>79%</td><td>75%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	70%	67%	71%	78%	78%	76%	79%	79%	75%	75% to 60% Average: 69%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	70%	67%	71%	78%	78%	76%	79%	79%	75%														
Trust company (mean score – where 10 is trust completely and 1 is do not trust at all) (Sample size: 394)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Mean Score</th><td>7.14</td><td>7.72</td><td>7.69</td><td>8.03</td><td>8.06</td><td>7.93</td><td>8.15</td><td>8.20</td><td>7.95</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Mean Score	7.14	7.72	7.69	8.03	8.06	7.93	8.15	8.20	7.95	8.19 to 7.04 Average: 7.67	
Year	11	12	13	14	15	16	17	18	19														
Mean Score	7.14	7.72	7.69	8.03	8.06	7.93	8.15	8.20	7.95														
Awareness of consumer rights and responsibilities																							
Likely to contact company if worried about paying bill (Sample size: 384)	<table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>80%</td><td>72%</td><td>64%</td><td>77%</td><td>68%</td><td>68%</td><td>76%</td><td>68%</td><td>78%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	80%	72%	64%	77%	68%	68%	76%	68%	78%	79% to 68% Average: 73%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	80%	72%	64%	77%	68%	68%	76%	68%	78%														

Results for Welsh Water	Percentage of household customers	Range and average for all WASCs ¹	Comments or points of interest																				
Aware of free meter option (Sample size: 249*) ³	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>53%</td><td>66%</td><td>54%</td><td>57%</td><td>67%</td><td>69%</td><td>71%</td><td>67%</td><td>70%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	53%	66%	54%	57%	67%	69%	71%	67%	70%	76% to 45% Average: 64%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	53%	66%	54%	57%	67%	69%	71%	67%	70%														
Aware of option to go back to rateable value charge within 24 months (Sample size: 249*) ³	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>35%</td><td>37%</td><td>29%</td><td>30%</td><td>26%</td><td>34%</td><td>27%</td><td>26%</td><td>22%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	35%	37%	29%	30%	26%	34%	27%	26%	22%	35% to 15% Average: 24%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	35%	37%	29%	30%	26%	34%	27%	26%	22%														
Aware of Welsh Water Assist (Sample size: 400*)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>7%</td><td>6%</td><td>9%</td><td>13%</td><td>13%</td><td>18%</td><td>15%</td><td>17%</td><td>14%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	7%	6%	9%	13%	13%	18%	15%	17%	14%	19% to 7% Average: 10%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	7%	6%	9%	13%	13%	18%	15%	17%	14%														
Aware of other schemes offered which provide lower charges to help customers who struggle to afford their bills (Sample size: 400*) ⁴	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>1%</td><td>5%</td><td>5%</td><td>6%</td><td>5%</td><td>4%</td><td>7%</td><td></td><td></td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	1%	5%	5%	6%	5%	4%	7%			8% to 3% Average: 5%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	1%	5%	5%	6%	5%	4%	7%																
Aware of Priority Services (Sample size: 400*) ⁵	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>46%</td><td>45%</td><td>46%</td><td>40%</td><td>46%</td><td>43%</td><td></td><td></td><td></td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	46%	45%	46%	40%	46%	43%				49% to 35% Average: 42%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	46%	45%	46%	40%	46%	43%																	
Contact																							
Contacted water company with query in last 12 months (Sample size: 399*)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>11%</td><td>9%</td><td>17%</td><td>14%</td><td>15%</td><td>18%</td><td>20%</td><td>22%</td><td>20%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	11%	9%	17%	14%	15%	18%	20%	22%	20%	25% to 15% Average: 20%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	11%	9%	17%	14%	15%	18%	20%	22%	20%														
Reason for contacting water company was to complain (Sample size: 81 who made contact)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>27%</td><td>32%</td><td>5%</td><td>7%</td><td>5%</td><td>6%</td><td>11%</td><td>1%</td><td>4%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	27%	32%	5%	7%	5%	6%	11%	1%	4%	12% to 2% Average: 5%	Low base size
Year	11	12	13	14	15	16	17	18	19														
Percentage	27%	32%	5%	7%	5%	6%	11%	1%	4%														
Satisfaction with way query handled (Sample size: 80 who made contact)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>94%</td><td>87%</td><td>91%</td><td>83%</td><td>83%</td><td>85%</td><td>80%</td><td>87%</td><td>81%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	94%	87%	91%	83%	83%	85%	80%	87%	81%	91% to 71% Average: 80%	Low base size
Year	11	12	13	14	15	16	17	18	19														
Percentage	94%	87%	91%	83%	83%	85%	80%	87%	81%														

Results for Welsh Water	Percentage of household customers	Range and average for all WASCs ¹	Comments or points of interest																				
Water on tap																							
Satisfied with colour and appearance of tap water (Sample size: 399)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>94%</td><td>93%</td><td>94%</td><td>97%</td><td>98%</td><td>95%</td><td>95%</td><td>95%</td><td>94%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	94%	93%	94%	97%	98%	95%	95%	95%	94%	97% to 90% Average: 93%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	94%	93%	94%	97%	98%	95%	95%	95%	94%														
Satisfied with taste and smell (Sample size: 392)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>91%</td><td>87%</td><td>89%</td><td>94%</td><td>92%</td><td>93%</td><td>93%</td><td>94%</td><td>92%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	91%	87%	89%	94%	92%	93%	93%	94%	92%	92% to 81% Average: 87%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	91%	87%	89%	94%	92%	93%	93%	94%	92%														
Satisfied with hardness/softness (Sample size: 373)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>93%</td><td>86%</td><td>94%</td><td>94%</td><td>92%</td><td>94%</td><td>92%</td><td>93%</td><td>88%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	93%	86%	94%	94%	92%	94%	92%	93%	88%	92% to 44% Average: 71%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	93%	86%	94%	94%	92%	94%	92%	93%	88%														
Satisfied with safety (Sample size: 385)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>94%</td><td>92%</td><td>96%</td><td>96%</td><td>96%</td><td>94%</td><td>97%</td><td>95%</td><td>95%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	94%	92%	96%	96%	96%	94%	97%	95%	95%	96% to 90% Average: 93%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	94%	92%	96%	96%	96%	94%	97%	95%	95%														
Satisfied with reliability of supply (Sample size: 399)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>97%</td><td>98%</td><td>100%</td><td>98%</td><td>98%</td><td>98%</td><td>98%</td><td>97%</td><td>97%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	97%	98%	100%	98%	98%	98%	98%	97%	97%	99% to 93% Average: 96%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	97%	98%	100%	98%	98%	98%	98%	97%	97%														
Satisfied with water pressure (Sample size: 399)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>88%</td><td>91%</td><td>96%</td><td>91%</td><td>93%</td><td>90%</td><td>89%</td><td>91%</td><td>90%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	88%	91%	96%	91%	93%	90%	89%	91%	90%	93% to 85% Average: 89%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	88%	91%	96%	91%	93%	90%	89%	91%	90%														
A sewerage system that works																							
Satisfied with company actions to reduce smells from sewerage treatment works (Sample size: 256)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>84%</td><td>80%</td><td>75%</td><td>87%</td><td>90%</td><td>82%</td><td>81%</td><td>81%</td><td>82%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	84%	80%	75%	87%	90%	82%	81%	81%	82%	89% to 73% Average: 81%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	84%	80%	75%	87%	90%	82%	81%	81%	82%														
Satisfied with maintenance of sewerage pipes & treatment works (Sample size: 267)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>82%</td><td>80%</td><td>80%</td><td>89%</td><td>91%</td><td>89%</td><td>87%</td><td>82%</td><td>82%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	82%	80%	80%	89%	91%	89%	87%	82%	82%	89% to 76% Average: 82%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	82%	80%	80%	89%	91%	89%	87%	82%	82%														
Satisfied with company cleaning of waste water before releasing it back into the environment (Sample size: 235)	 <table border="1"> <tr><th>Year</th><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><th>Percentage</th><td>83%</td><td>80%</td><td>85%</td><td>90%</td><td>92%</td><td>86%</td><td>85%</td><td>81%</td><td>80%</td></tr> </table>	Year	11	12	13	14	15	16	17	18	19	Percentage	83%	80%	85%	90%	92%	86%	85%	81%	80%	87% to 69% Average: 79%	
Year	11	12	13	14	15	16	17	18	19														
Percentage	83%	80%	85%	90%	92%	86%	85%	81%	80%														

Results for Welsh Water	Percentage of household customers	Range and average for all WASCs ¹	Comments or points of interest
Satisfied with company actions to minimise sewer flooding (Sample size: 264)		85% to 72% Average: 78%	
Likelihood to recommend as a provider of water and sewerage services			
Extremely likely to recommend Welsh Water to friends and family as a provider (Sample size: 380) ^{4,6}		56% to 25% Average: 41%	

Sample Profile

Regional sample profile for Welsh Water	(Sample size: 400*)
Gender	
Male	46%
Female	54%
Age	
18-29	2%
30-44	10%
45-59	38%
60-74	33%
75+	18%
SEC	
Higher managerial, administrative & professional occupations	42%
Intermediate occupations	23%
Routine & manual occupations	25%
Never worked and long-term unemployed/full-time students	8%
Refused	3%
Water meter	
Proportion having a water meter	38%

- Statistical reliability on sample size of 400 is +/- 4.9%

¹ Average (mean) proportion for all WaSCs is based on weighted data. All other data is unweighted.

² Sample size is shown in brackets and excludes don't knows unless followed by an asterisk *

³ Question filtered on unmetered households as per the main report.

⁴ Question not asked in all years.

⁵ Question wording changed in 2014.

⁶ Extremely likely to recommend is based on the proportion of customers scoring 9 or 10.