



BRISTOL  
WATER



FutureFocusResearch  
Innovation and Insight

# Customer Survey 2023 Final Report

March 2023

Prepared by:  
Future Focus Research

It's what we're made of.



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# Objectives and Methodology

- The key research objective was to ascertain domestic customer satisfaction and perception.
- Specifically the survey collected information on :
  - customer satisfaction
  - billing
  - water efficiency
  - environmental/biodiversity efforts.

- In total 1000 interviews were achieved.
- Questionnaire length approx. 10 - 12 minutes.
- Interviews were conducted with any adult in the household and not necessarily the person in the household responsible for dealing with their water company.
- Interviews conducted in postcodes BA, BS, GL and TA.
- Quotas were set on age, gender and postcode as follows:

Demographic	% of sample	Sample Sizes
<b>Gender</b>		
Male	48%	480
Female	52%	520
Total	100%	1000
<b>Age Groups</b>		
16 - 34	28%	280
35-54	36%	360
55+	36%	360
Total	100%	1000
<b>Postcode</b>		
BS	68%	680
BA	17%	170
TA	8%	80
GL	7%	70

- Interviews were conducted in February and March 2023

- The following distribution of interviews was achieved:

AGE GROUP	MALE	FEMALE	OTHER	TOTAL
Up to 34	126	149	3	278
35 – 54	195	162	0	357
55+	156	201	0	357
Prefer not to say	2	6	0	8
TOTAL	479	518	3	1000

- The following distribution of interviews was achieved by postcode area:
- BS postcodes: 68%
- BA: 17%
- TA: 8%
- GL: 7%



# Summary

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## Customer Satisfaction

- 80% of respondents rated the service received from Bristol Water very good or good (86% in 2022)
- 72% rated Bristol Water's reputation as a service provider as very good or good (83% in 2022)
- There would appear to be a downward trend since 2021 in the percentage rating very good or good for both of the above indicators, although this has not resulted in an increase in the poor/very poor rating (increase was in neither and don't know categories)
- When asked about specific services offered by Bristol Water, there continues to be a high level of satisfaction overall.
- A comparison of respondents' expectations and satisfaction of water companies revealed that:
  - The following issues were identified as a priority: *affordable bills.*
  - The following were identified as a low priority: *increase the number of customers on a water meter, ease of transferring account, demonstrates innovation, adds value to local area, has a clear plan on how to maintain water supply during a drought, contributes to the community and keeps customers informed of how their money is spent.*
  - All the following were identified as needing to examine the cost v benefit of the service: *support customer to use less water*
  - All others were identified as areas to maintain performance

## Billing

- 68% rated the *value for money* of the service provided by Bristol Water as very good or good (77% in 2022). There would appear to be a downward trend since 2021 in the percentage rating value for money as very good or good.
- 27% (28% in 2022) had heard of the additional assistance measures offered through the priority service, of which 3% were subscribed to it (5% in 2022)
- 11% said that they had been concerned about paying their water bill during the past year (15% in 2022).
- 27% were aware of the additional assistance measures that BW offer through their Priority Services register, of which 3% were subscribed to it (28% in 2022)
- 25% were aware of the low tariffs for customers who struggle to pay their bills, of which 5% were subscribed to it (28% in 2022).
- 64% would not be prepared to pay the additional £100 suggested increase on their annual bill. Just 3% would be prepared to pay the increase now.



## Water Efficiency

- A high percentage were either willing to make changes to save water or were already making the changes:
  - *Stop washing cars* (70% very/fairly likely to change or already doing so)
  - *Stop watering plants/lawns* (76%)
  - *Restricting washing machine / dishwasher use* (71%)
  - *Stop taking bath and take fewer and shorter showers* (64%)
- 42% said that they had taken steps to save water during 2022
- 72% agree with the use of temporary bans in a drought

## Environment

- The majority placed high importance on Bristol Water's environmental efforts:
  - *Improving the environment, focusing on the quality of our lakes and water sources* (99% very/quite important)
  - *Supporting biodiversity in the natural environment* (97%)
  - *Reducing carbon emissions* (99%)
- When asked how Bristol Water performed against each of the environmental efforts the percentage rating each as very/quite well was as follows (the % don't know is also worth noting):
  - *Improving the environment, focusing on the quality of our lakes and water sources* (66% very/quite well, 22% don't know)
  - *Supporting biodiversity in the natural environment* (64% very/quite well, 25% don't know)
  - *Reducing carbon emissions* (59% very/quite well, 29% don't know)

# Research Findings



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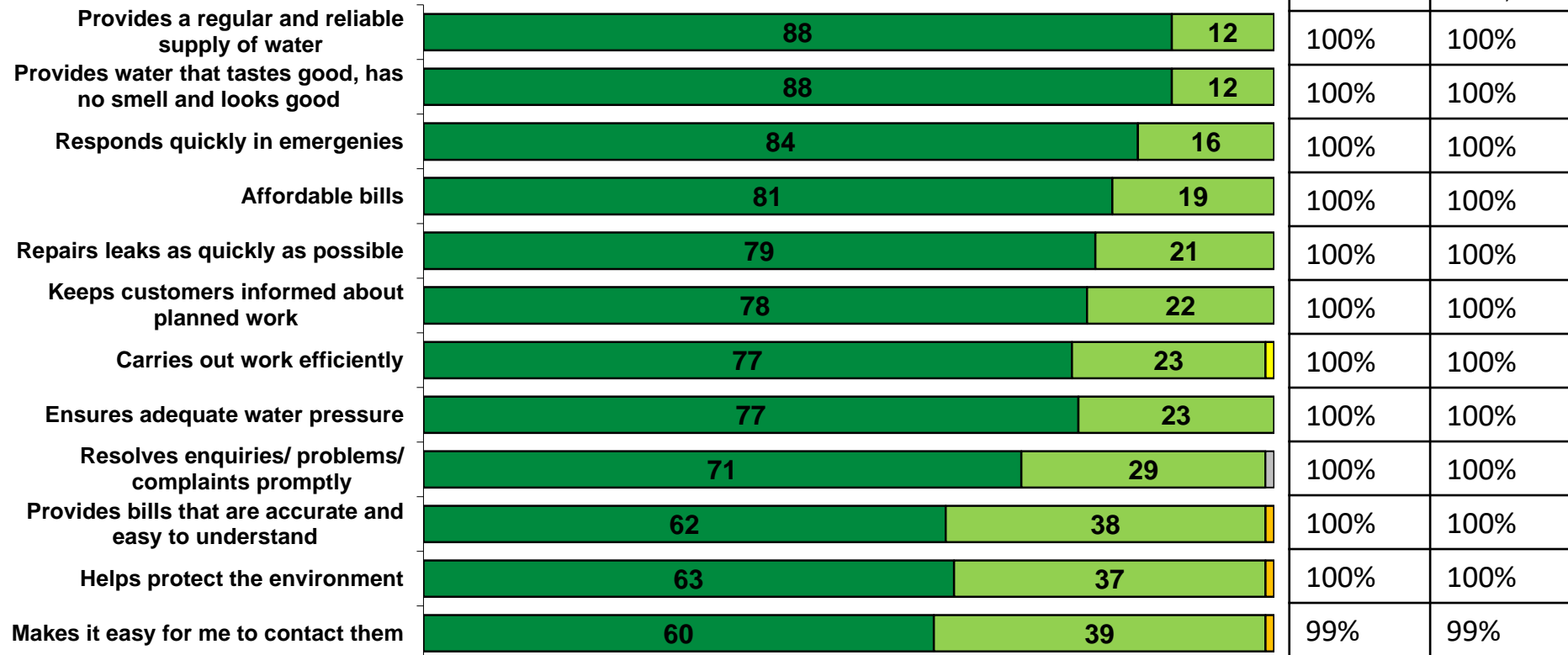


# Service Provision



# How important is it that your water provider does each of the following?

% respondents



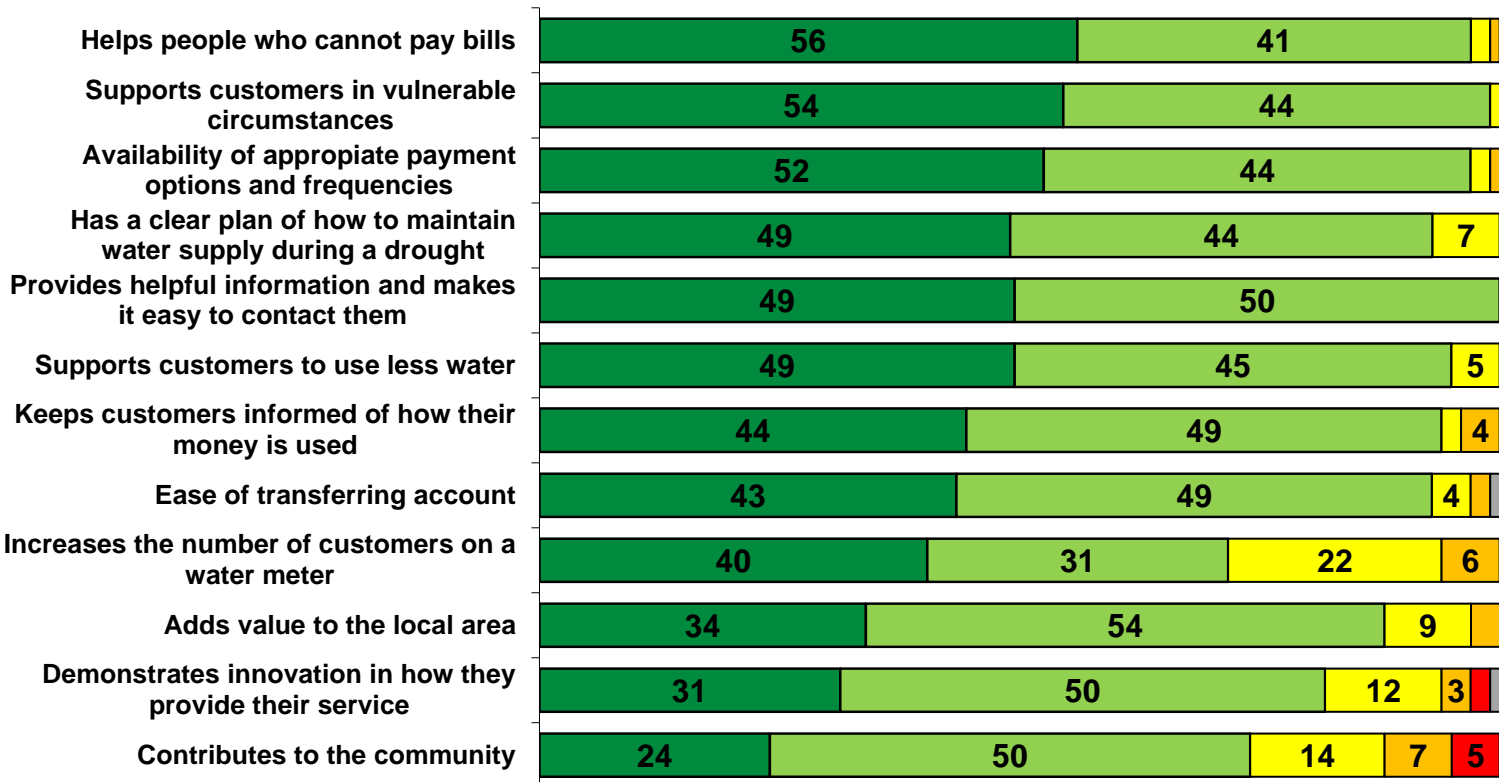
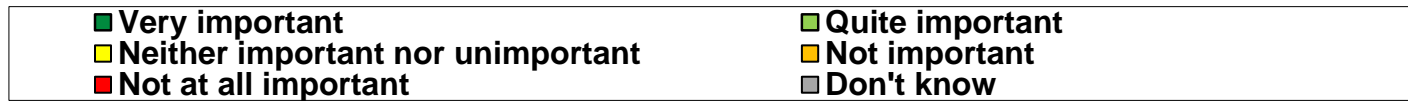
	A	B
% very/ quite important	100%	100%
% very/ quite important (excl. Don't knows)	100%	100%
	100%	100%
	100%	100%
	100%	100%
	100%	100%
	100%	100%
	100%	100%
	100%	100%
	100%	100%
	99%	99%

- Most statements are considered to be either very or quite important by the majority of customers.
- Of most importance are *providing a regular and reliable supply of water, provider water that tastes good, has no smell and looks good and responds quickly in emergencies and affordable bills*



# How important is it that your water provider does each of the following?

% respondents



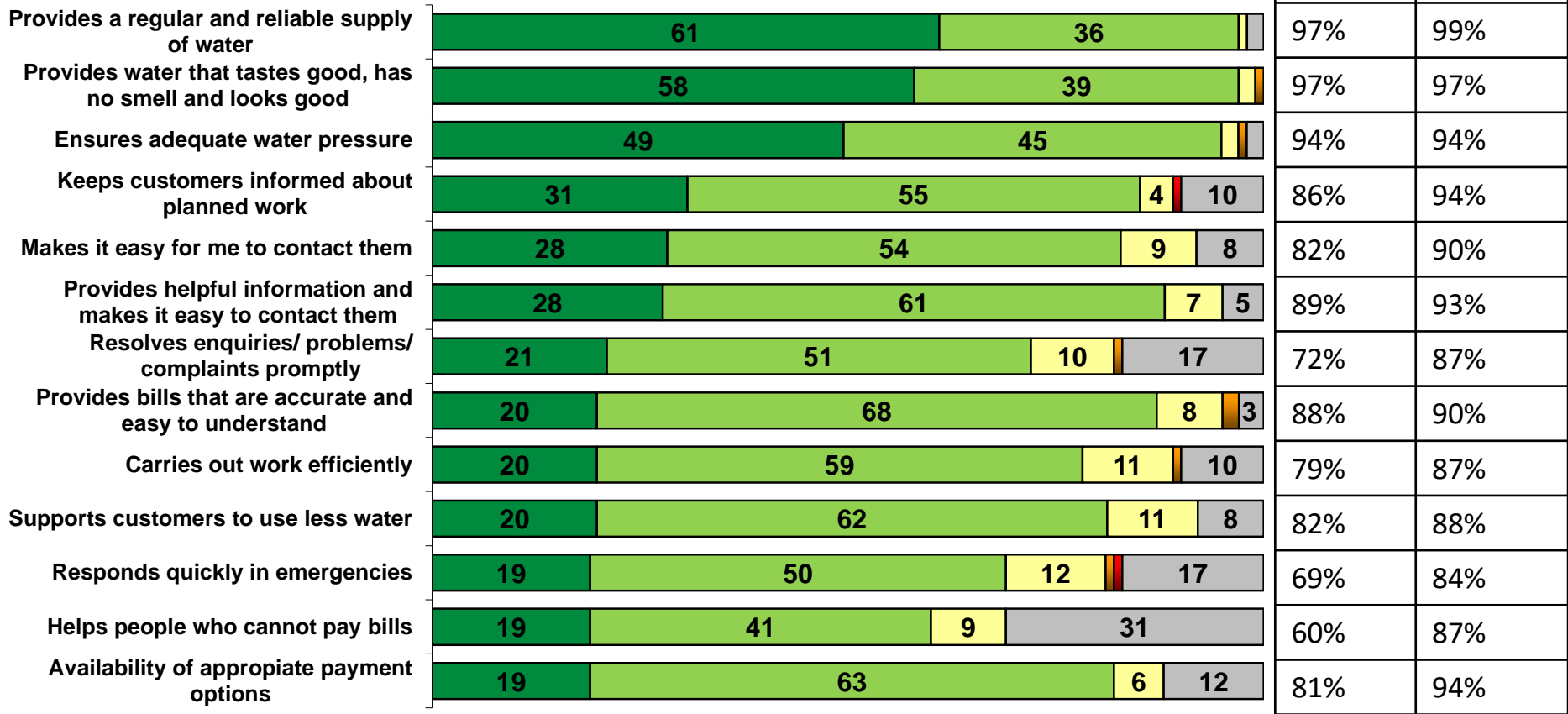
A	B
% very/ quite important	% very/ quite important (excl. Don't knows)
97%	98%
98%	98%
96%	96%
93%	93%
99%	99%
94%	94%
93%	93%
92%	93%
71%	71%
88%	88%
81%	83%
74%	74%

Of least importance are *increases the number of customers on a water meter (71%)* and *contributes to the community (74% very or quite important)*.

# How would you rate Bristol Water's performance for each of the following:

% respondents

■ Very well 
 ■ Quite well 
 ■ Neither well nor poor 
 ■ Not well 
 ■ Not at all well 
 ■ Don't know

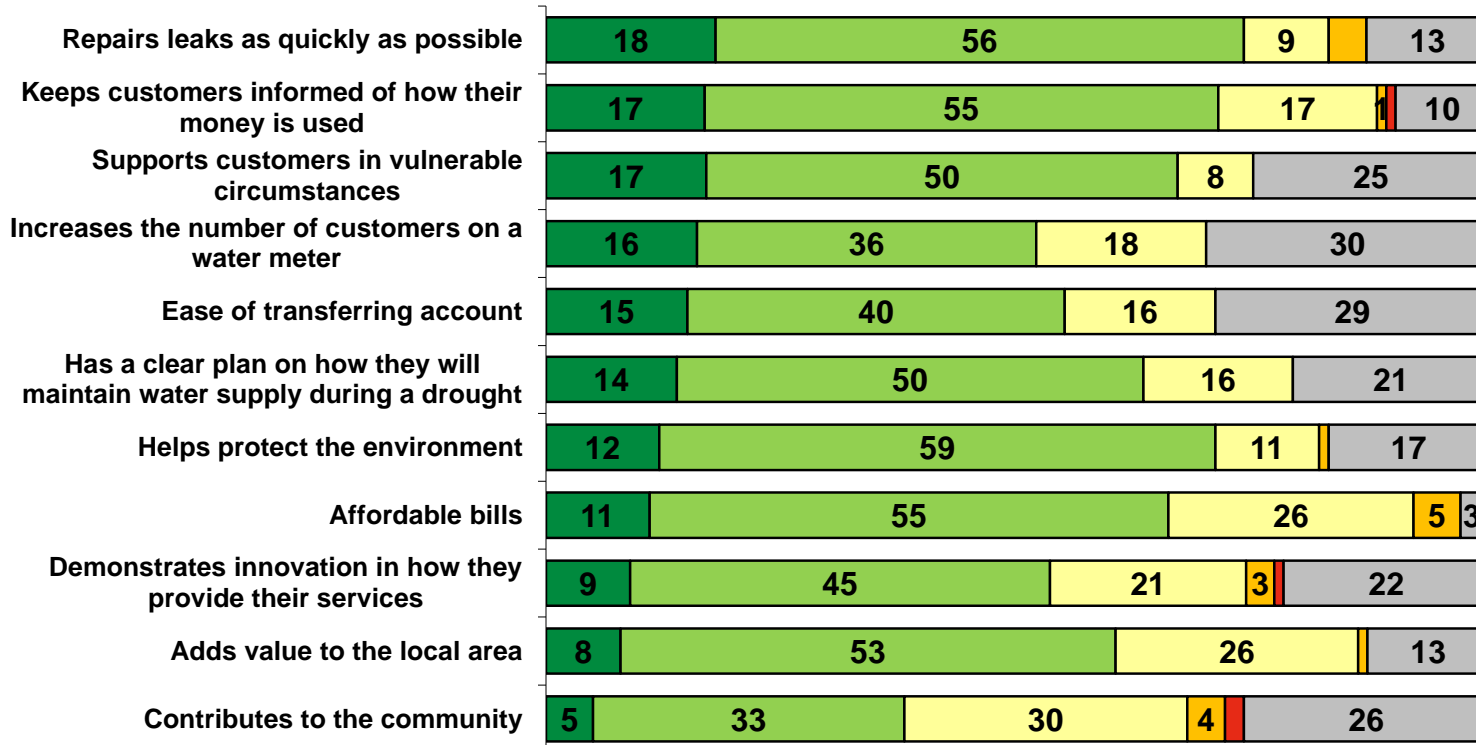


■ Provides a regular and reliable supply of water (97% very/quite well), provides water that tastes good, has no smell and looks good (97%) and ensures adequate water pressure (94%) are rated highest by customers.

# How would you rate Bristol Water's performance for each of the following:

% respondents

■ Very well 
 ■ Quite well 
 ■ Neither well nor poor 
 ■ Not well 
 ■ Not at all well 
 ■ Don't know



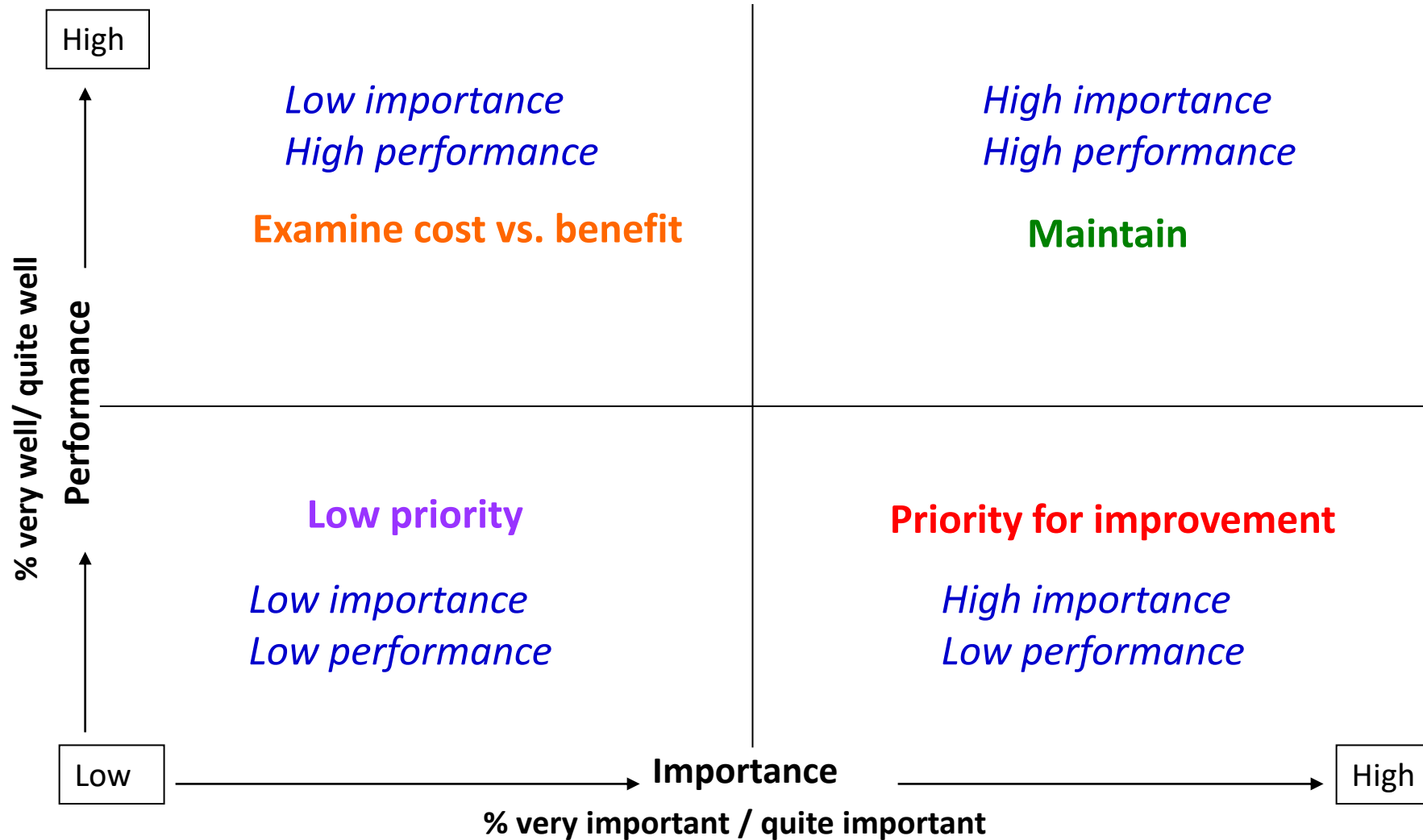
A	B
% very/ quite well	% very/ quite well (excl. Don't knows)
74%	85%
72%	80%
67%	89%
52%	75%
55%	78%
64%	80%
71%	86%
66%	68%
54%	69%
61%	69%
38%	52%

- Rated lowest are *contributes to the community* (38% very/quite well), *increases the number of customers on a water meter* (52%), *demonstrates innovation in how they provide their services* (54%) and *ease of transferring account* (55%).

## Satisfaction versus Importance Charts (1)

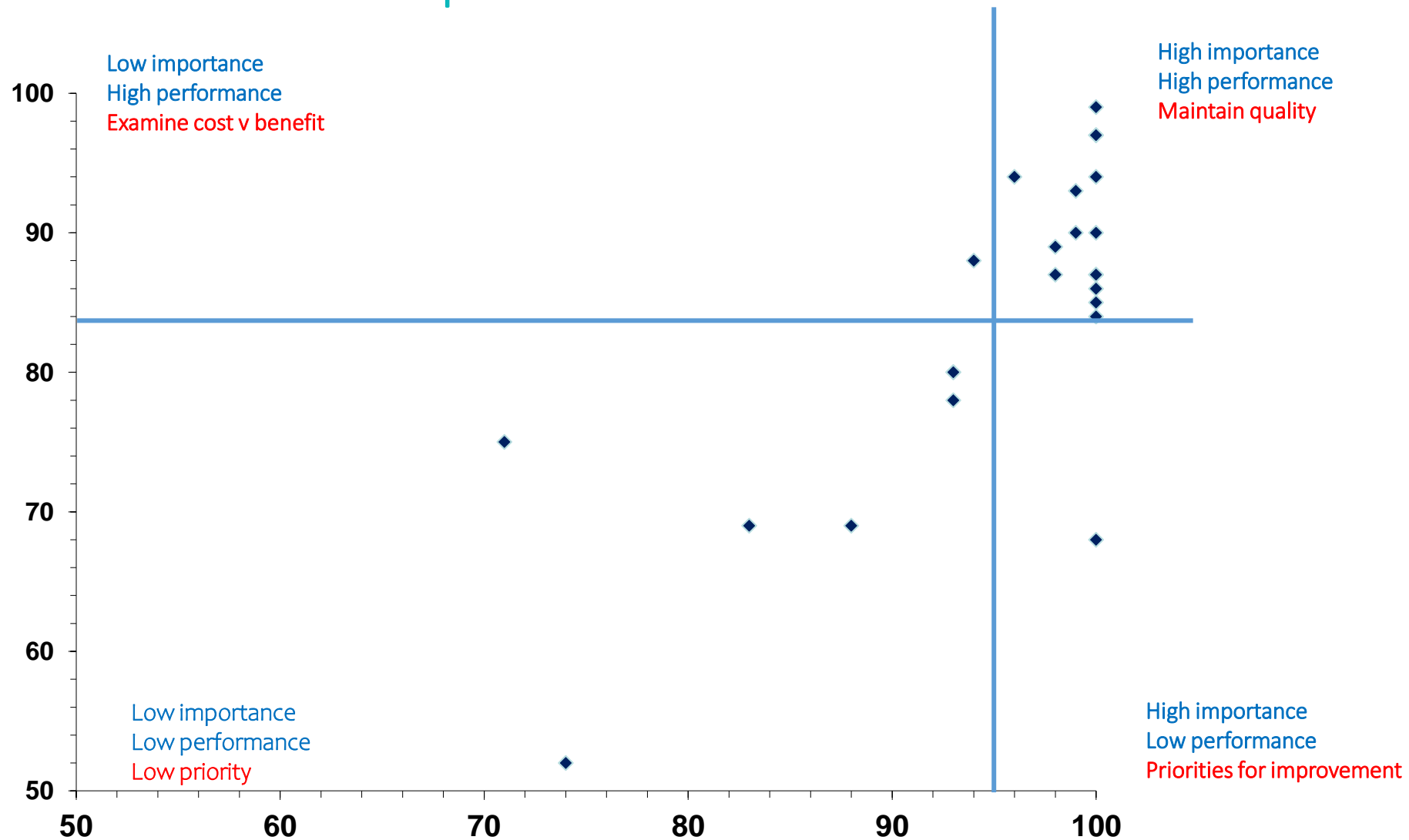
- The following charts are designed to illustrate whether respondents were satisfied with features and services they value as important.
- Respondents were asked to rate how important certain features or services were (slides 13 & 14). For example, “I am going to read out a list of different features of the products and services provided by utility companies. Thinking of water supply in general, I’d like you to rate how important each one is”.
- Respondents were then asked to rate how satisfied they were with how Bristol Water dealt with the same features or services (slides 15 & 16). For example, “Now, I’d like you to rate the performance of BRISTOL WATER on each of the features I read out. Please tell me whether you rate each aspect as good, poor or neither good nor poor. It doesn’t matter if you haven’t experienced each feature, it’s your opinions that I’m after”.
- Don’t know responses have been excluded from this analysis (column B in slides 13-16).
- The lines that form the quadrant are drawn based on the average performance score (for all attributes) and the average important score (for all attributes)
- Outputs from this enable an identification of those issues that customers feel are priorities

## Satisfaction versus Importance Charts (2)





## Satisfaction versus Importance



Low importance - High performance

Importance  $\leq 95$  and Performance  $\geq 85$

### Examine cost v benefit

- Support customer to use less water

High importance - High performance

Importance  $> 95$  and Performance  $> 85$

### Maintain quality

- Provides a regular and reliable supply
- Makes it easy for people to contact them
- Provides bills that are accurate and easy to understand
- Provides water that tastes good, looks good and has no smell
- Keeps customers informed about planned work
- Supports customers in vulnerable situations
- Helps people who cannot pay bills
- Provider helpful information and makes it easy for us to contact them
- Responds quickly in emergencies
- Helps protect the environment
- Carries out work efficiently
- Ensures adequate water pressure
- Resolves enquiries promptly
- Repairs leaks as quickly as possible
- Availability of appropriate payment options

Low importance - Low performance

Importance  $< 95$  and Performance  $< 85$

### Low priority

- Increases the number of customers on meters
- Demonstrates innovation
- Adds value to the local area
- Has a clear plan on how to maintain water supply during a drought
- Ease of transferring account
- Contributes to the community
- Keeps customers informed on how their money is spent

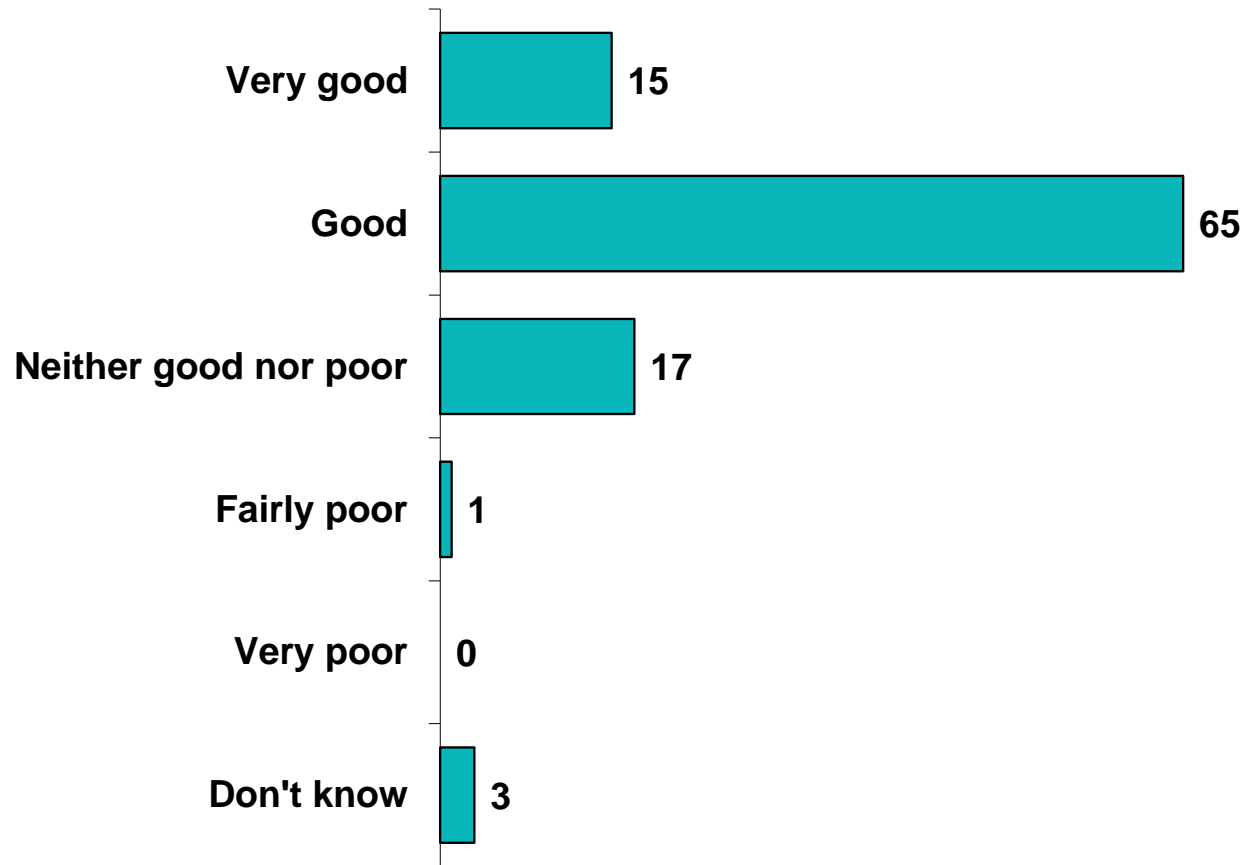
High importance - Low performance

Importance  $\geq 95$  and Performance  $\leq 85$

### Priorities for improvement

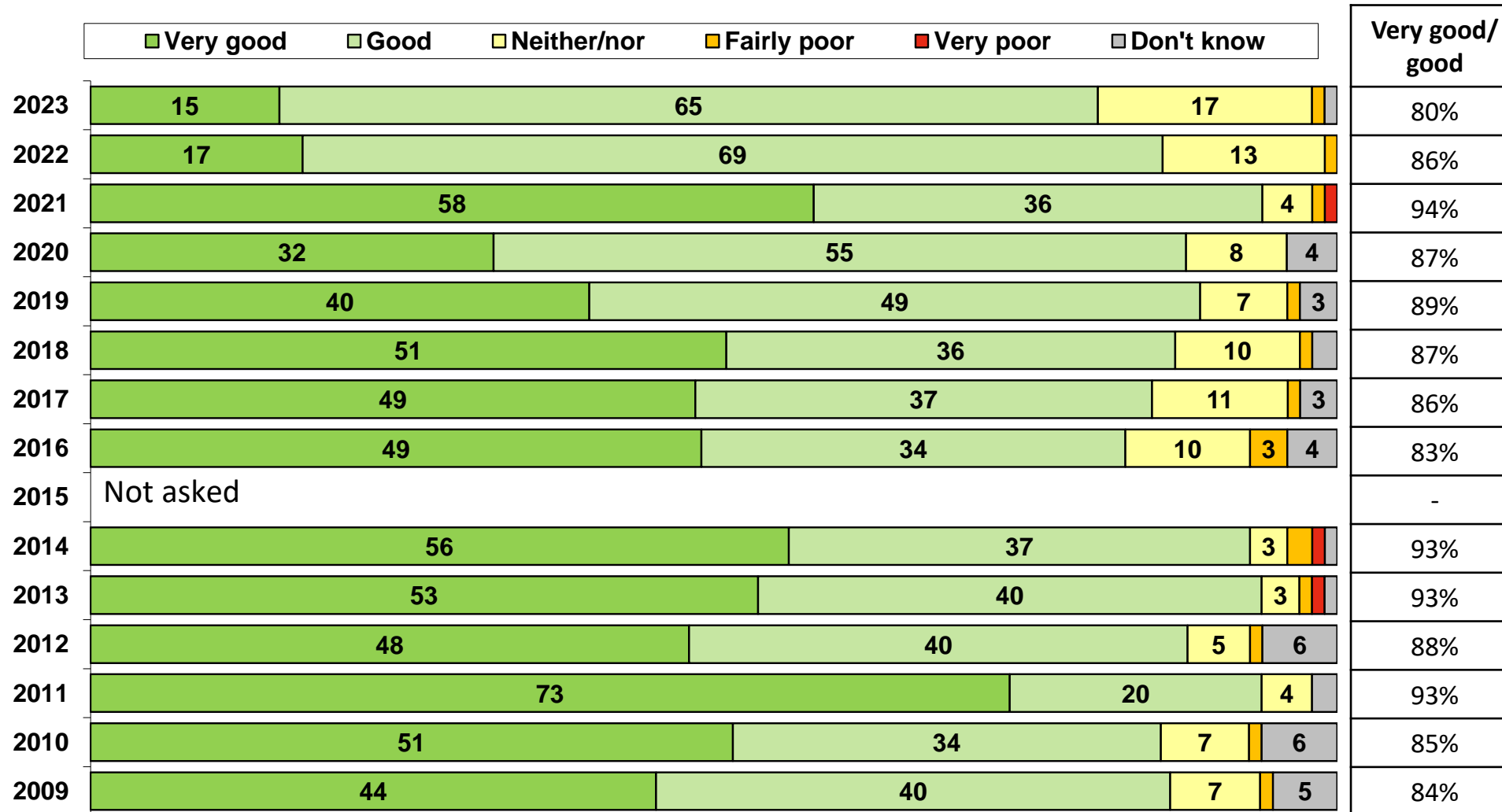
- Affordable bills

## Overall how would you rate the service you receive from Bristol Water...? % respondents



- 80% rated the service received from Bristol Water as either very good or good (86% in 2022)

# Overall how would you rate the service you receive from Bristol Water...? % respondents



## Reasons for satisfaction with the service you receive from Bristol Water... % respondents

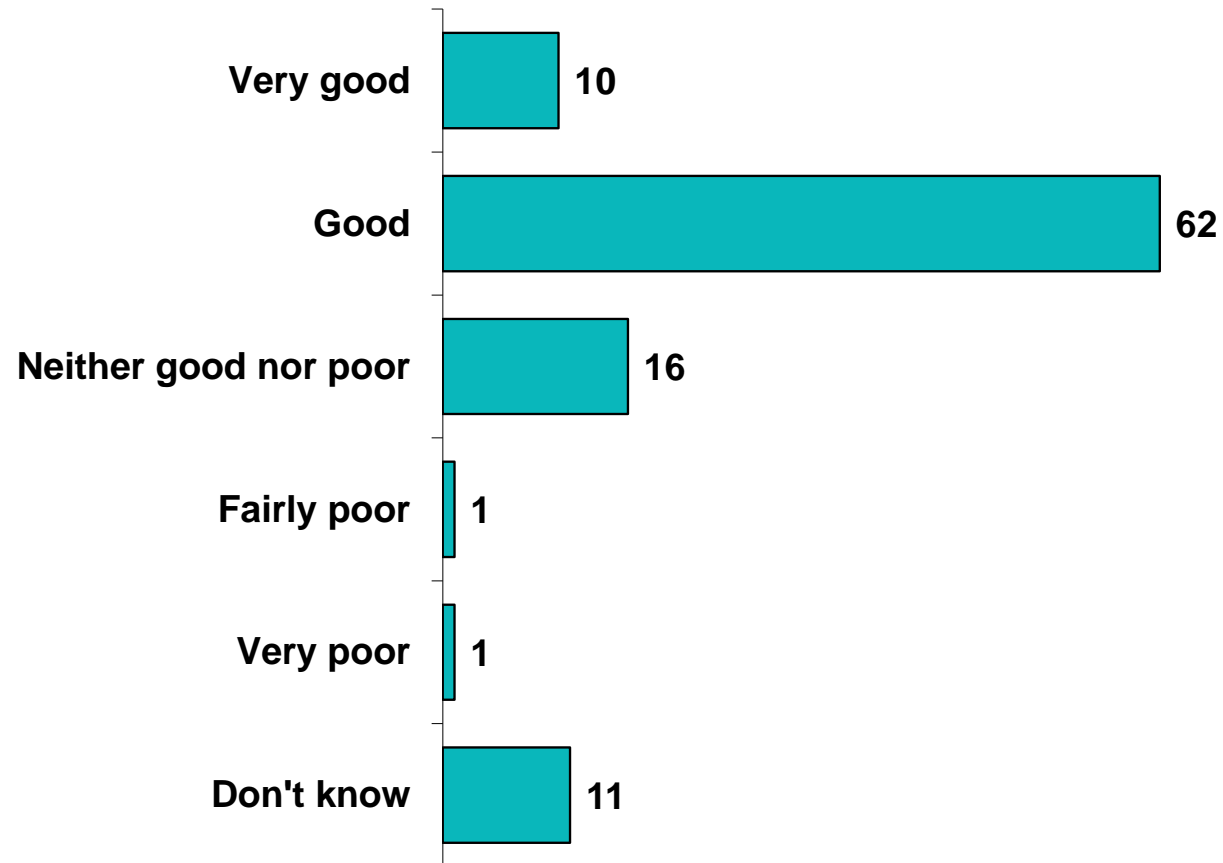
Main reasons for satisfaction	2023 (Base: 798) %	2022 (Base: 857) %	2021 (Base: 941) %	2020 (Base: 874) %	2019 (Base: 890) %	2018 (Base: 871) %	2017 (Base: 856) %	2016 (Base: 831) %	2015 (Base 347) %
Never had any problems with Bristol Water	69	67	53	37	29	55	67	63	75
Water quality is good	34	53	40	26	27	41	73	47	68
Reliable/consistent water supply	32	50	36	24	25	38	73	47	70
Good response times to problems	9	12	10	5	7	13	11	9	8
Efficient handling or telephone calls/letter	5	7	6	3	5	4	3	3	-
Efficient problem solving	5	6	13	5	5	5	10	9	7
Helpful information provided	6	4	7	8	4	7	4	6	4
Staff efficient/well trained	4	4	6	3	2	9	3	5	-
Work carried out efficiently	3	7	9	4	3	11	12	8	6
Good value for money	3	5	8	1	1	4	3	3	-
Efficient bill handling	2	4	7	3	4	8	3	2	8
Range of payment schemes available	2	4	1	2	<1	7	1	2	5
Community involvement	-	2	1	1	1	-	-	-	-



## Reasons for dissatisfaction with the service you receive from Bristol Water... % respondents

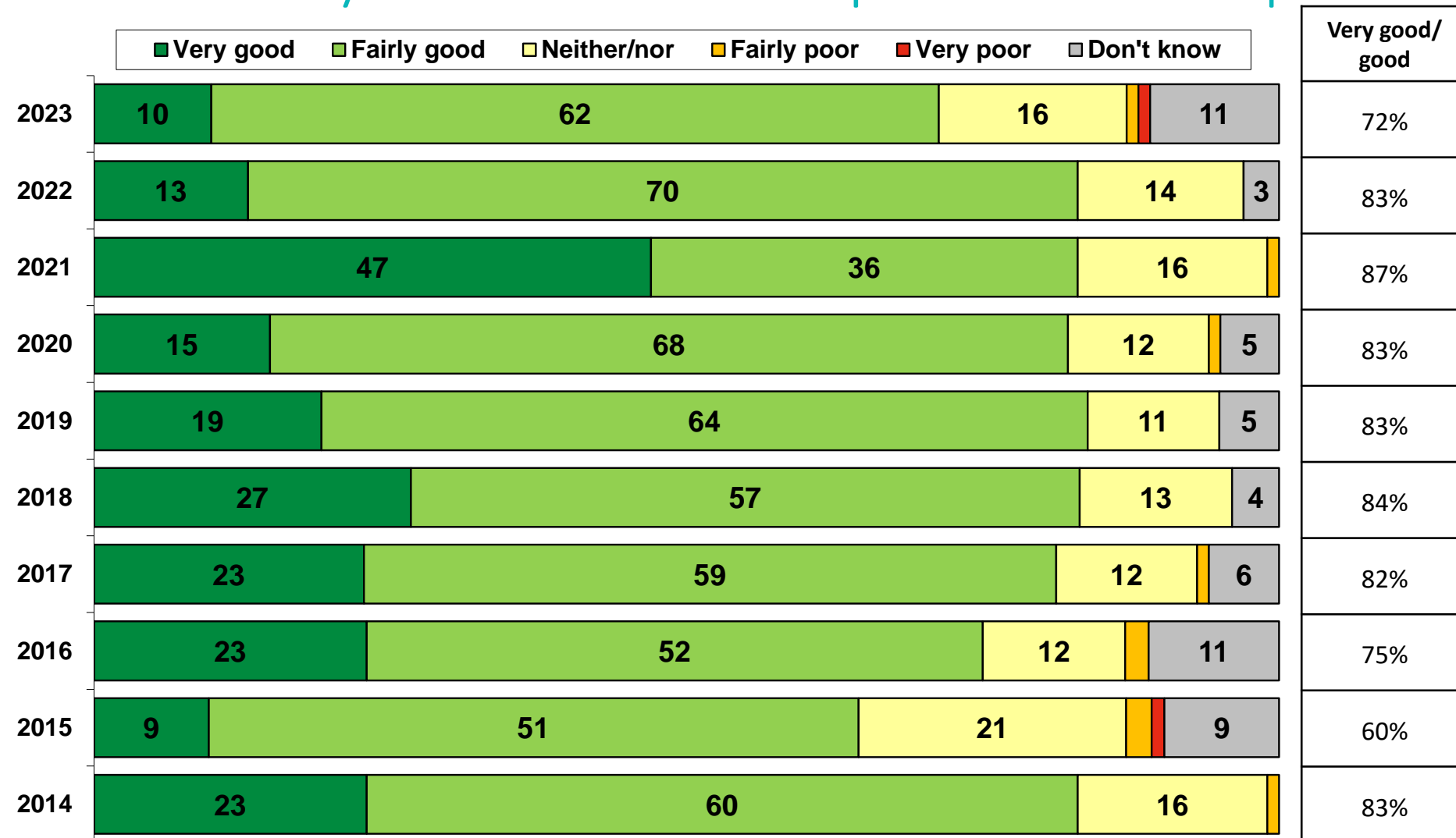
Main reasons for dissatisfaction	2023 (Base: 9) No.	2022 (Base: 10) No.	2021 (Base: 16) No.	2020 (Base: 5) No.	2019 (Base: 8) No.	2018 (Base: 10) No.	2017 (Base: 8) No.	2016 (Base: 34) %	2015 (Base 28) %
Not enough information provided	7	-	3	-	-	-	1	6	4
Bills too expensive	4	-	4	-	-	4	3	79	79
Poor response to problems	3	3	2	2	3	-	1	6	14
Not enough / no warning of disruption	2	3		-	-	-	-	9	4
Can't afford the bill	1	-		-	-	3	-	-	-
Poor quality of work carried out	1	-	3	2	3	-	2	12	11
Poor water quality	1	5	11	1	1	-	4	24	14
Poor handling of telephone calls	-	1	4	-	-	3	-	6	4
Incorrect bills	-	-		-	-	3	-	6	7
Poor ground repair after completing work	-	-	2	-	3	-	1	6	7
Estimated bills		-		-	-	-	-	6	7

## Overall how would you rate Bristol Water's reputation as a service provider? % respondents



- 72% rated Bristol Water's reputation as a service provider as either very good or good (83% in 2022)

# Overall how would you rate Bristol Water's reputation as a service provider? % respondents



## Reasons for rating Bristol Water’s reputation as a service provider as very good or good? % respondents

Main reasons for very good/good	2023 (Base: 720) %	2022 (Base: 831) %	2021 (Base: 827) %	2020 (Base: 822) %	2019 (Base: 831) %	2018 (Base: 827) %
Never had any problems with Bristol Water	66	70	63	34	27	58
Water quality is good	48	53	13	24	25	44
Good customer service	11	13	13	9	8	15
Good response times to problems	10	12	9	8	8	11
Good value for money	6	2	4	3	1	3
Work/repairs carried out efficiently	5	17	8	7	6	15
Efficient billing	1	3	4	3	3	8
Community involvement	-	1	1	1	1	-

## Reasons for rating Bristol Water’s reputation as a service provider as poor/very poor? % respondents

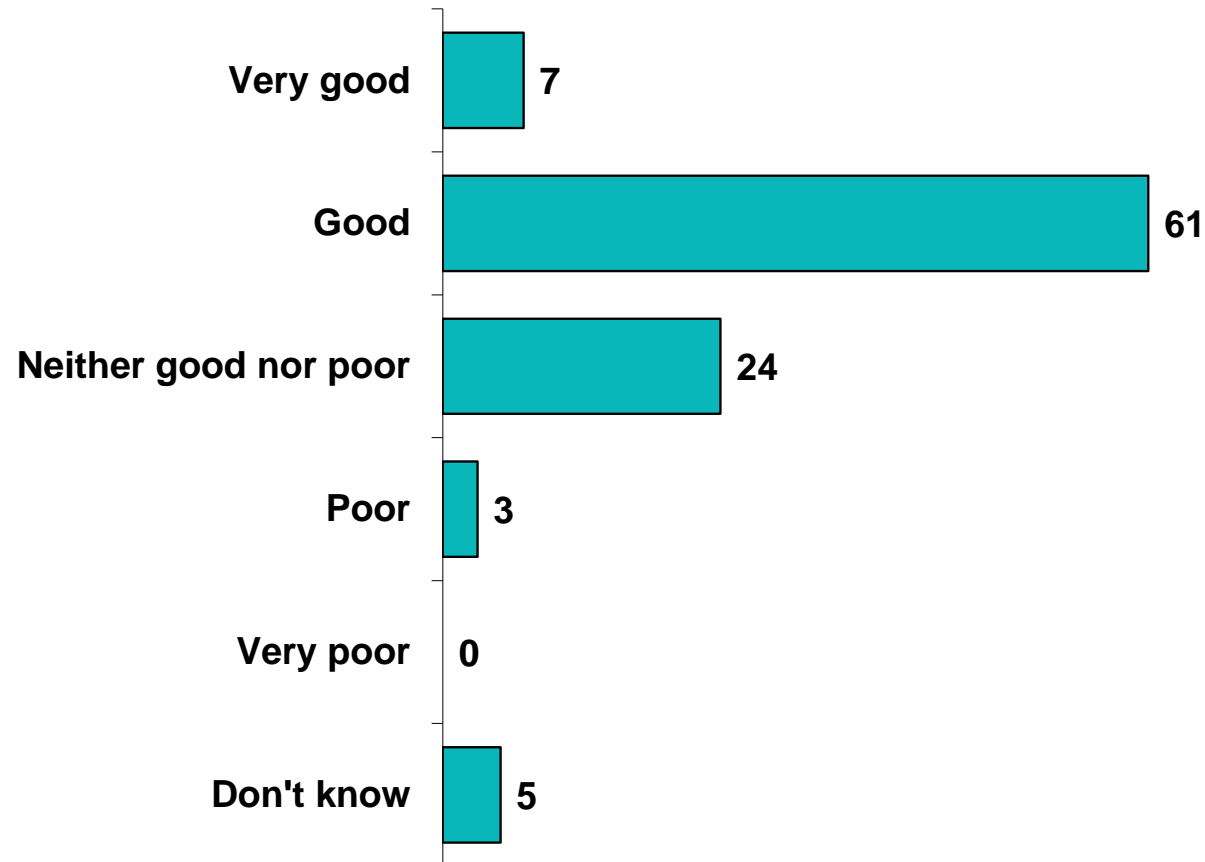
Main reasons for poor/very poor	2023 (Base: 13) No	2022 (Base: 5) No	2021 (Base: 11) No	2020 (Base: 11) No	2019 (Base: 4) No	2018 (Base: 4) No
Poor quality of work carried out	5	1	2	3	3	-
Poor response time to problems	3		1			
Poor value for money	2	-	1	3	-	1
Incorrect/estimated bills	-	-	2	1	-	3
Poor customer service	-	-	1	4	-	3
Poor water quality	-		1			
Other	4	4	6	-	2	-



# Billing

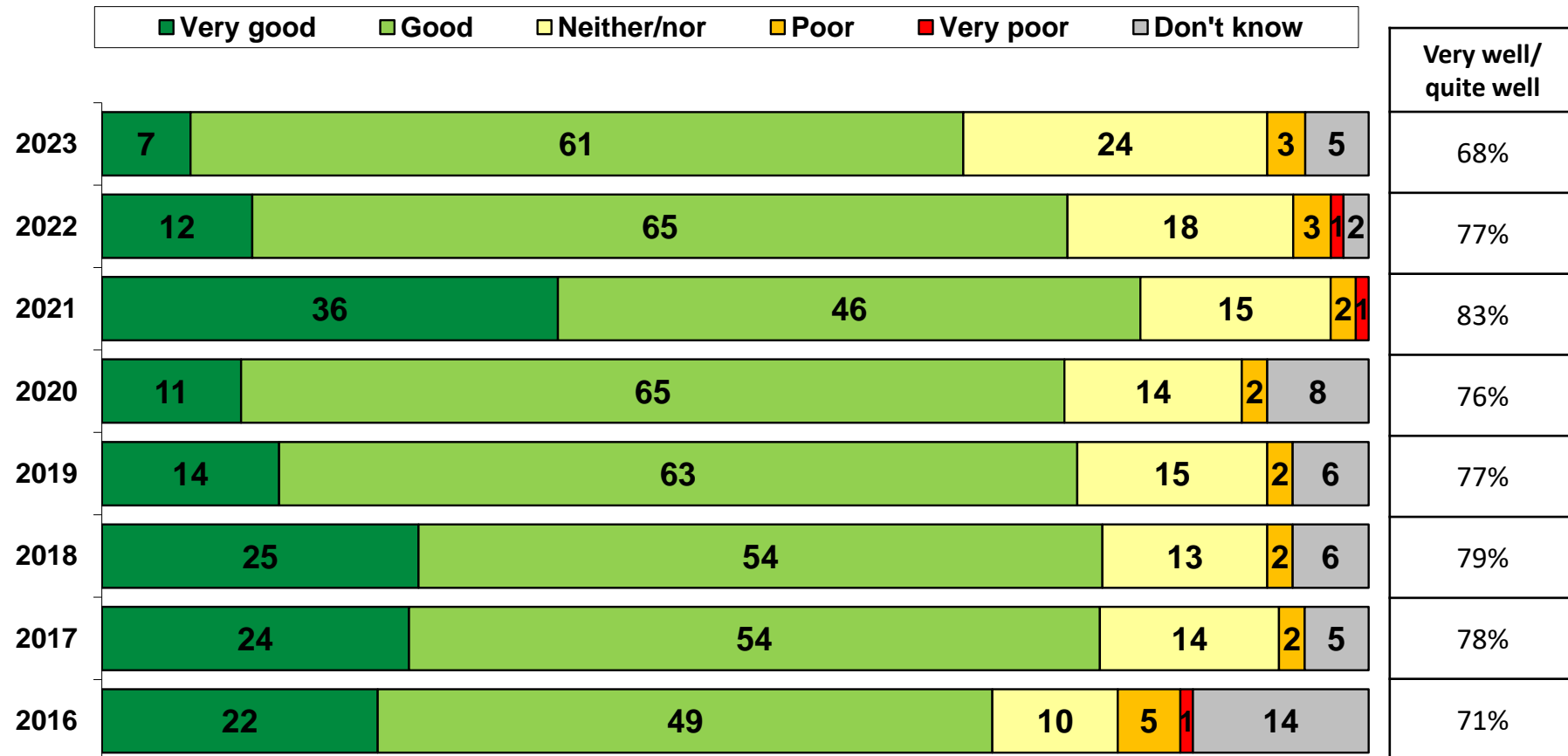


## Thinking about value for money, overall how would you rate Bristol Water in relation to the service they provide? % respondents



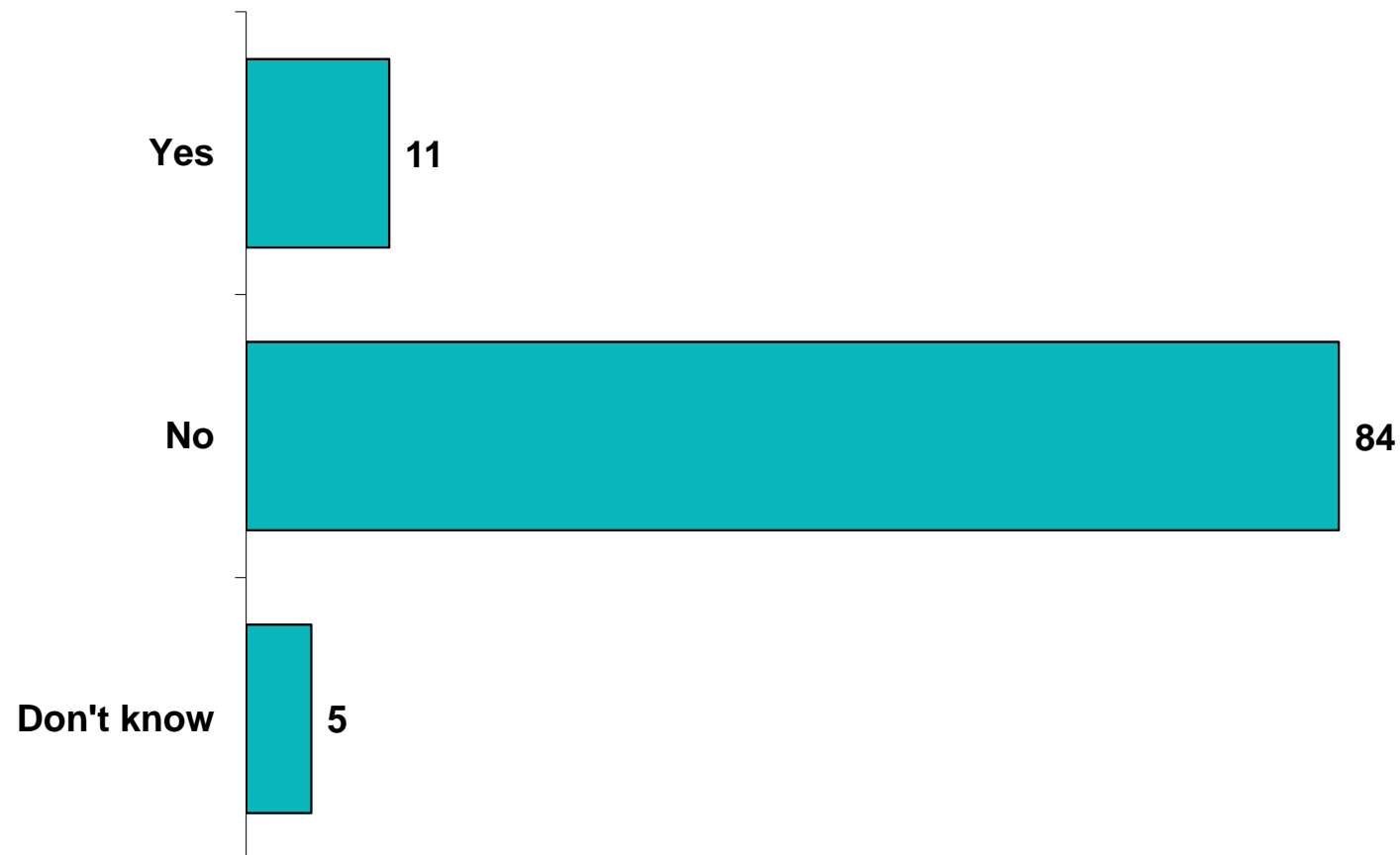
- 68% rated the value for money from Bristol Water as either very good or good (77% in 2022)

# Thinking about value for money, overall how would you rate Bristol Water in relation to the service they provide? % respondents



## During the last year, have you been concerned about being able to afford your water bill?

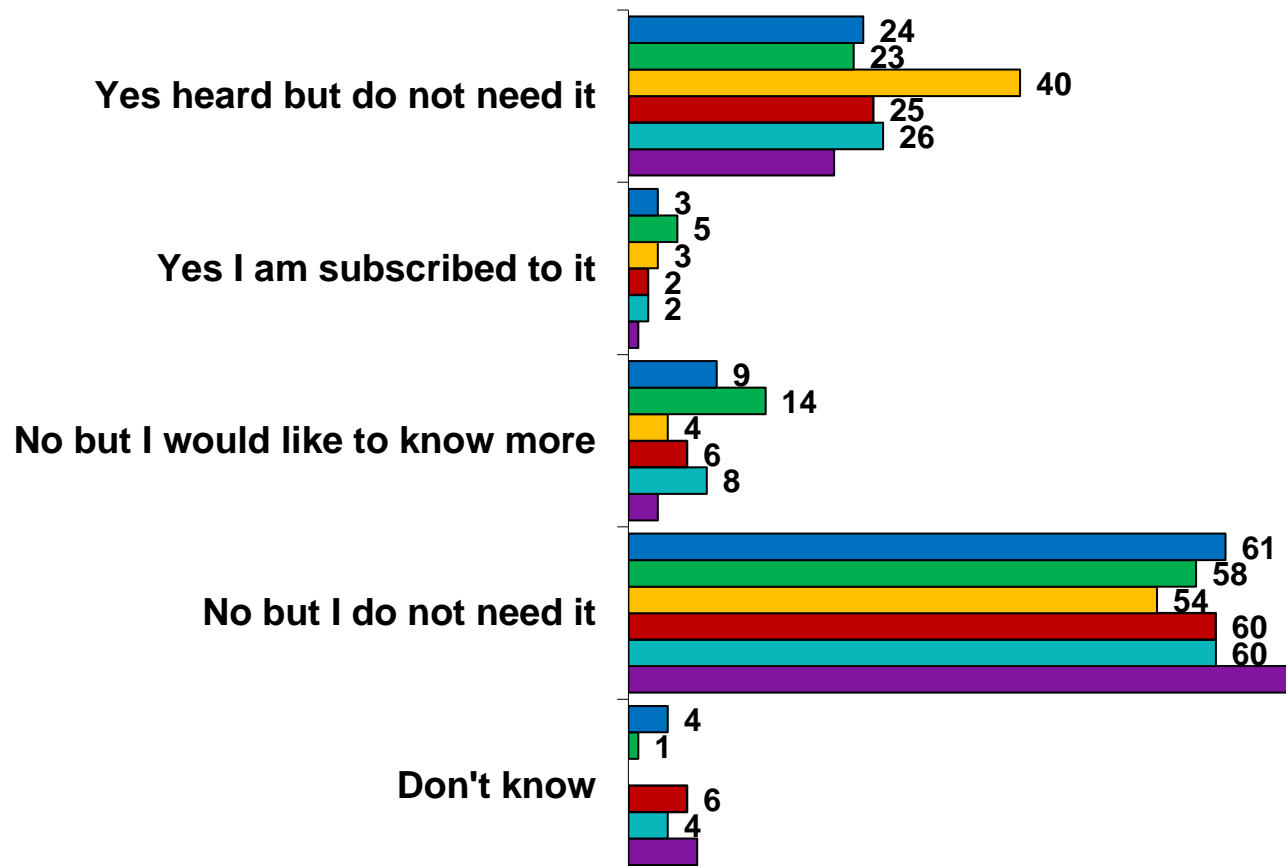
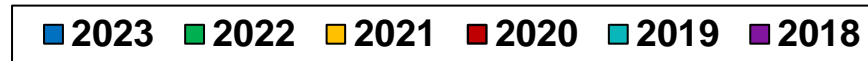
% respondents



- 11% said that they had been concerned about being able to afford their water bill in the last year (15% in 2022, 6% in 2021\*)

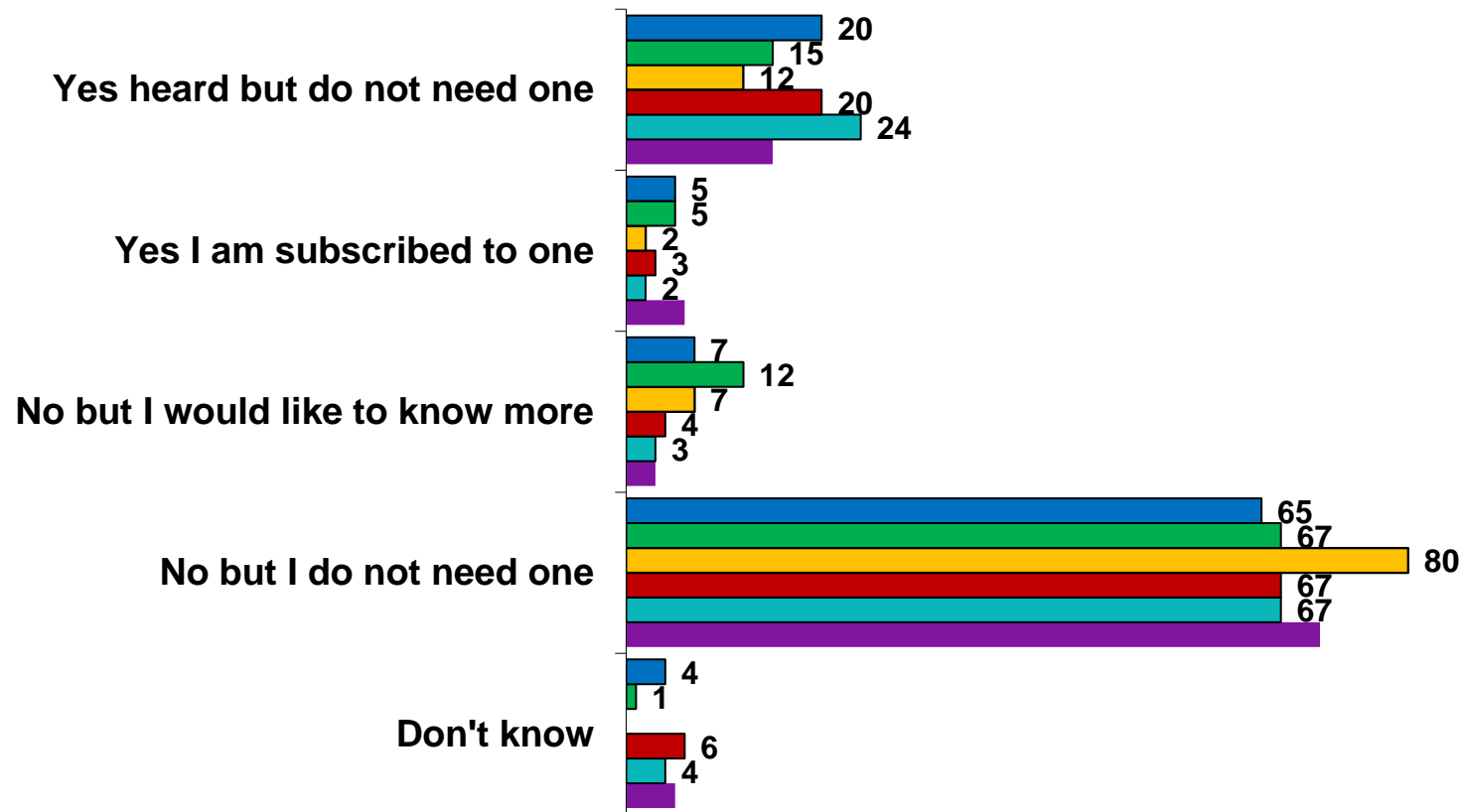
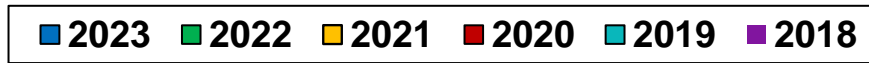
\* In 2021 the question was worded “are you concerned about being able to afford your water bill because of the pandemic?”

# Are you aware of the additional assistance measures that we offer through our Priority Services register such as large print or braille bills etc ... % respondents



- 27% were aware of the additional assistance measures (28% in 2022)

# Are you aware of or on any of our low rate tariffs for customers who are struggling to afford their bill? % respondents



- 25% were aware of the low rate tariffs (20% in 2022)

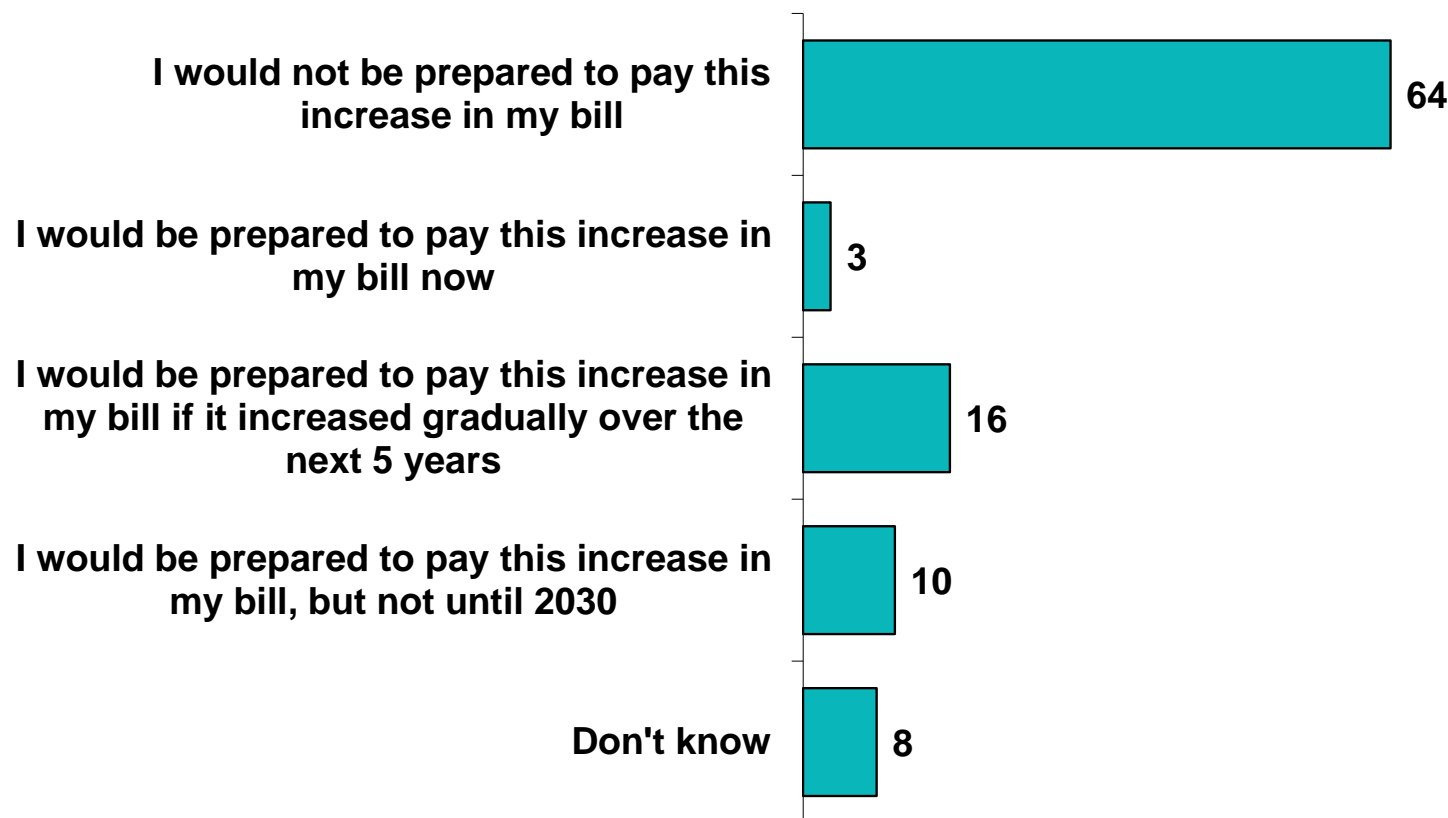
## How did you find out about the low rate tariffs? % respondents

	2023 (Base: 247) %	2022 (Base: 201) %	2021 (Base: 226) %	2020 (Base: 226) %	2019 (Base: 261) %	2018 (Base: 203) %
Through a friend/neighbour	41	37	6	35	26	28
When I spoke to Bristol Water	21	18	15	25	23	33
Through another organisation	13	8	2	11	13	7
Information on the website	7	5	12	9	23	10
At a community centre	3	5	-	-	-	-
Bristol Water stall at an event	1	5	-	-	-	-
Other	17	24	-	19	16	21



## Looking ahead, in 2030 if your annual water and sewerage bill had been increased by £100 to drive the changes required to protect the environment, how acceptable would this be?

% respondents



- 64% would not be prepared to pay this increased in their bill

Looking ahead, in 2030 if your annual water and sewerage bill had been increased by £100 to drive the changes required to protect the environment, how acceptable would this be?

Why did you say that? *I would not be prepared to pay this increase in my bill*

% respondents

<b>Main reasons for:</b> <i>I would not be prepared to pay this increase in my bill</i> (Base: 636)	%
I shouldn't be paying for that, the government should	41
I'm struggling to pay all my bills/with cost of living	40
I'd pay a bit more but not that much	17
My bill is already unaffordable	6
Don't know	0
Other	9

Looking ahead, in 2030 if your annual water and sewerage bill had been increased by £100 to drive the changes required to protect the environment, how acceptable would this be?

Why did you say that? *I would be prepared to pay this increase in my bill now*

% respondents

<b>Main reasons for: <i>I would be prepared to pay this increase in my bill now</i> (Base: 28)</b>	<b>No.</b>
It would benefit the environment	23
It would benefit me directly	5
I think the service provided is good value for money	2
It would benefit local communities	1
Don't know	0
Other	2

# Looking ahead, in 2030 if your annual water and sewerage bill had been increased by £100 to drive the changes required to protect the environment, how acceptable would this be?

% respondents

<b>Main reasons for:</b> <i>I would be prepared to pay this increase in my bill if it increased gradually over 5 years</i> (Base: 157)	%
It would benefit the environment	42
I'd pay a bit more but not that much	22
I think the service provided is good value for money	11
I'm struggling to pay all my bills/with cost of living	8
It would benefit me directly	6
My bill is already unaffordable	5
I shouldn't be paying for that, the government should	5
It would benefit local communities	3
Don't know	8
Other	6

# Looking ahead, in 2030 if your annual water and sewerage bill had been increased by £100 to drive the changes required to protect the environment, how acceptable would this be?

% respondents

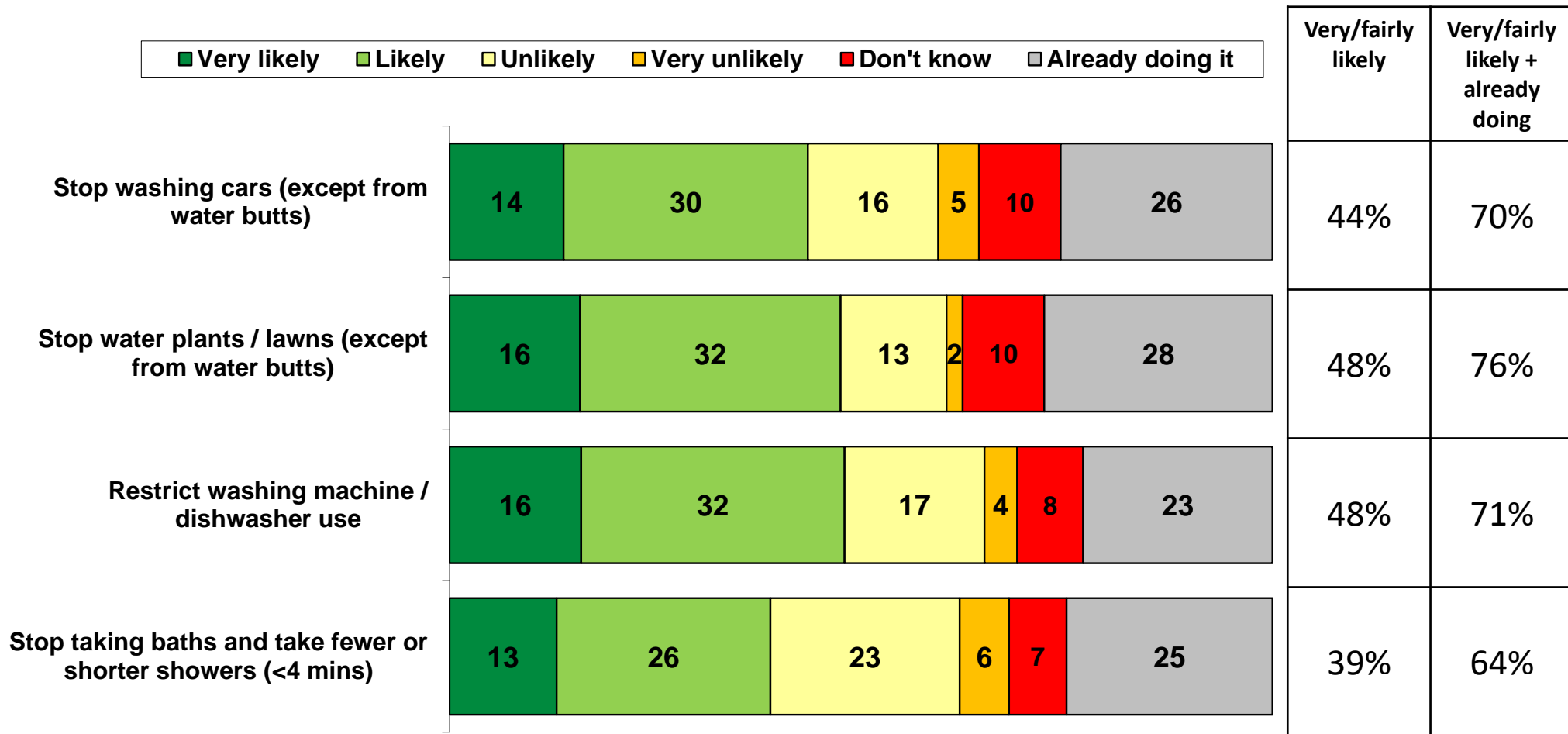
<b>Main reasons for:</b> <i>I would be prepared to pay this increase in my bill, but not until 2030</i> (Base: 104)	%
It would benefit the environment	31
I'm struggling to pay all my bills/with cost of living	29
I'd pay a bit more but not that much	21
My bill is already unaffordable	5
I shouldn't be paying for that, the government should	9
I think the service provided is good value for money	9
It would benefit me directly	7
It would benefit local communities	3
Don't know	5
Other	12



# Water Efficiency



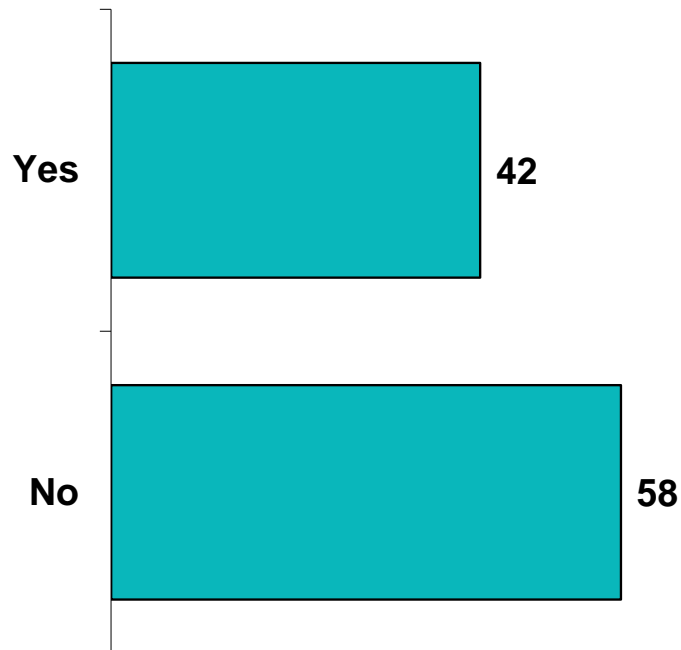
# How willing are you and your household to make any of the following changes to your water use habits to reduce demand and protect the environment? % respondents



# Did you take any particular steps to save water during 2022 given the long spell of dry weather?

% respondents

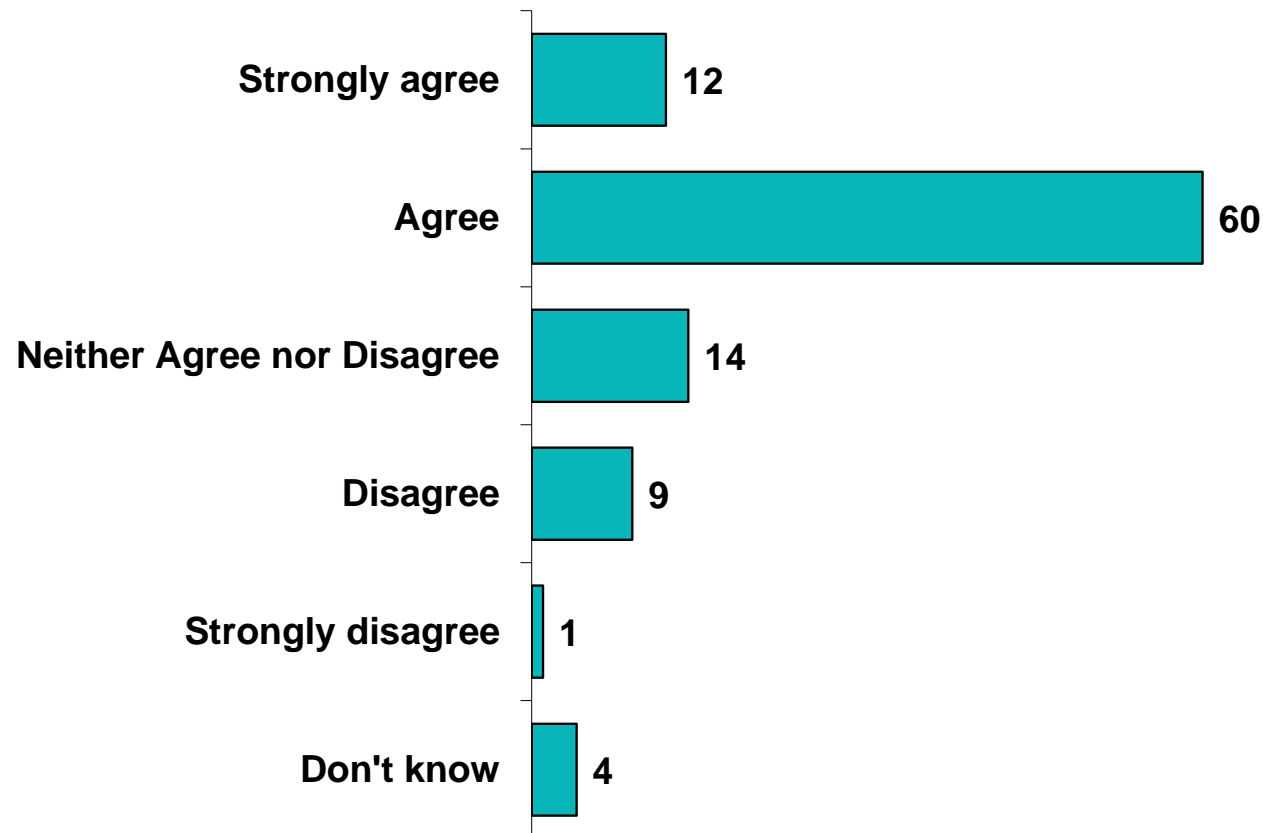
- 42% said that they used a little or a lot more water at home during the pandemic (25% in 2021)



- This is how people told us that they saved water:

Activity (Base: 421)	%age
Spending a shorter time in the shower	26%
Not having a shower every day	17%
Not flushing the toilet after every use	82%
Reusing water used in the kitchen for other things like watering plants	27%
Not washing clothes after every wear	17%
Not watering outdoor plants / lawn with hose or sprinkler	38%
Keeping a close eye on how much water your household is using	41%
Turning off tap when brushing teeth	23%
Using a bucket rather than a hose to wash car	15%
Water butt	3%

To what extent do you agree with the use of temporary use bans in a drought, when the water company has done everything else it can to manage water resources before implementing the ban? % respondents



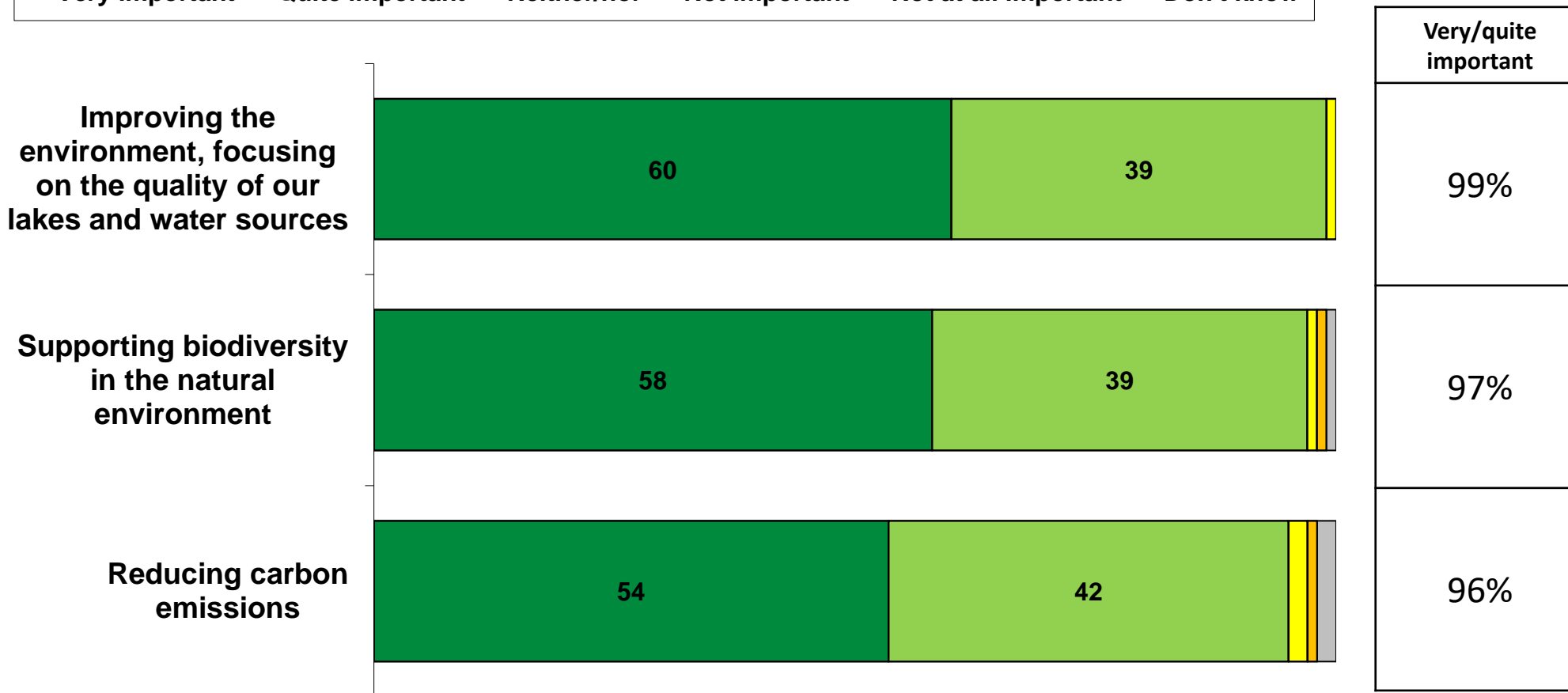
- 72% agree with the use of temporary bans in a drought



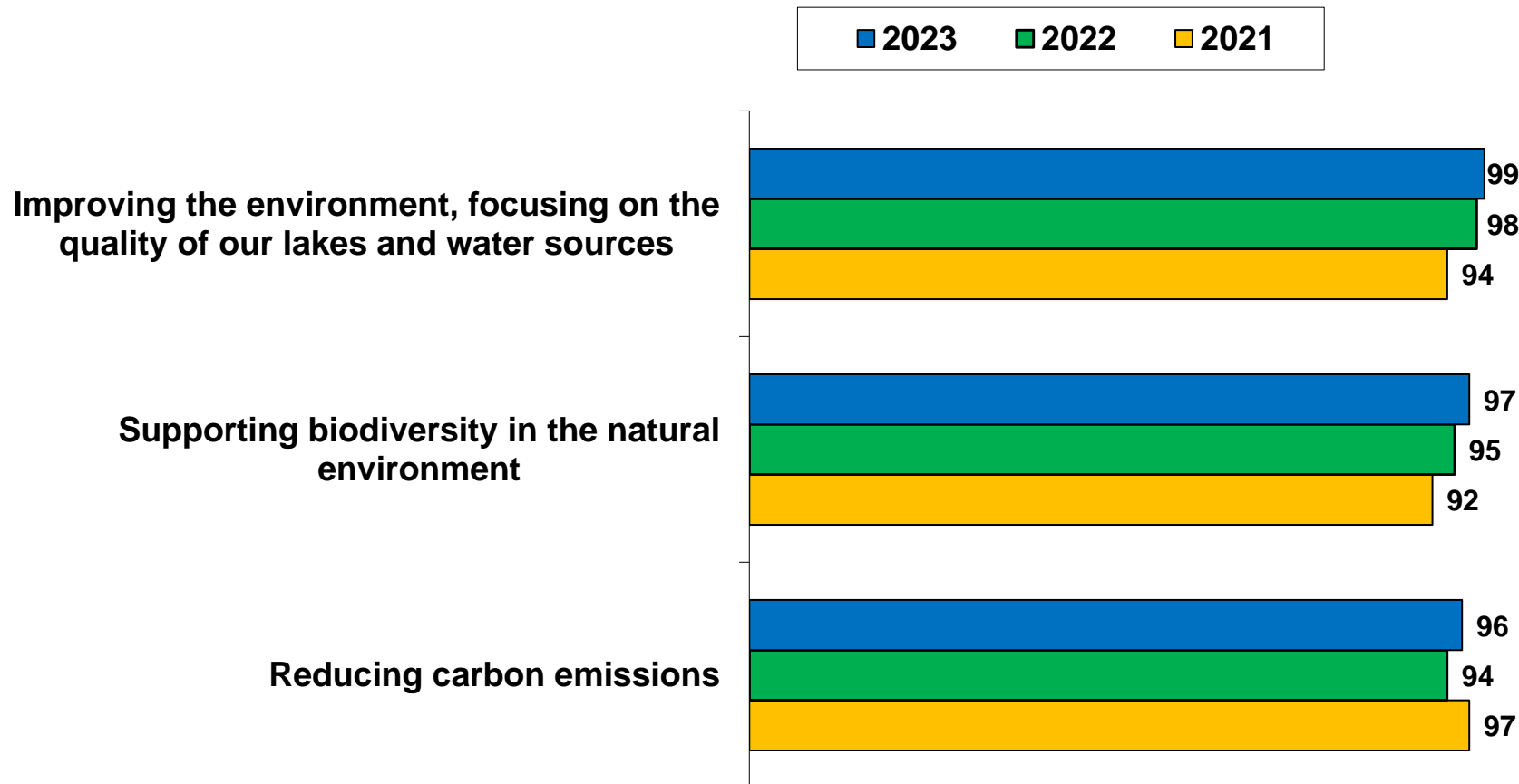
# Environment

## How important are each of the following environmental efforts for a water company to contribute to? % respondents

■ Very important  
 ■ Quite important  
 ■ Neither/nor  
 ■ Not important  
 ■ Not at all important  
 ■ Don't know



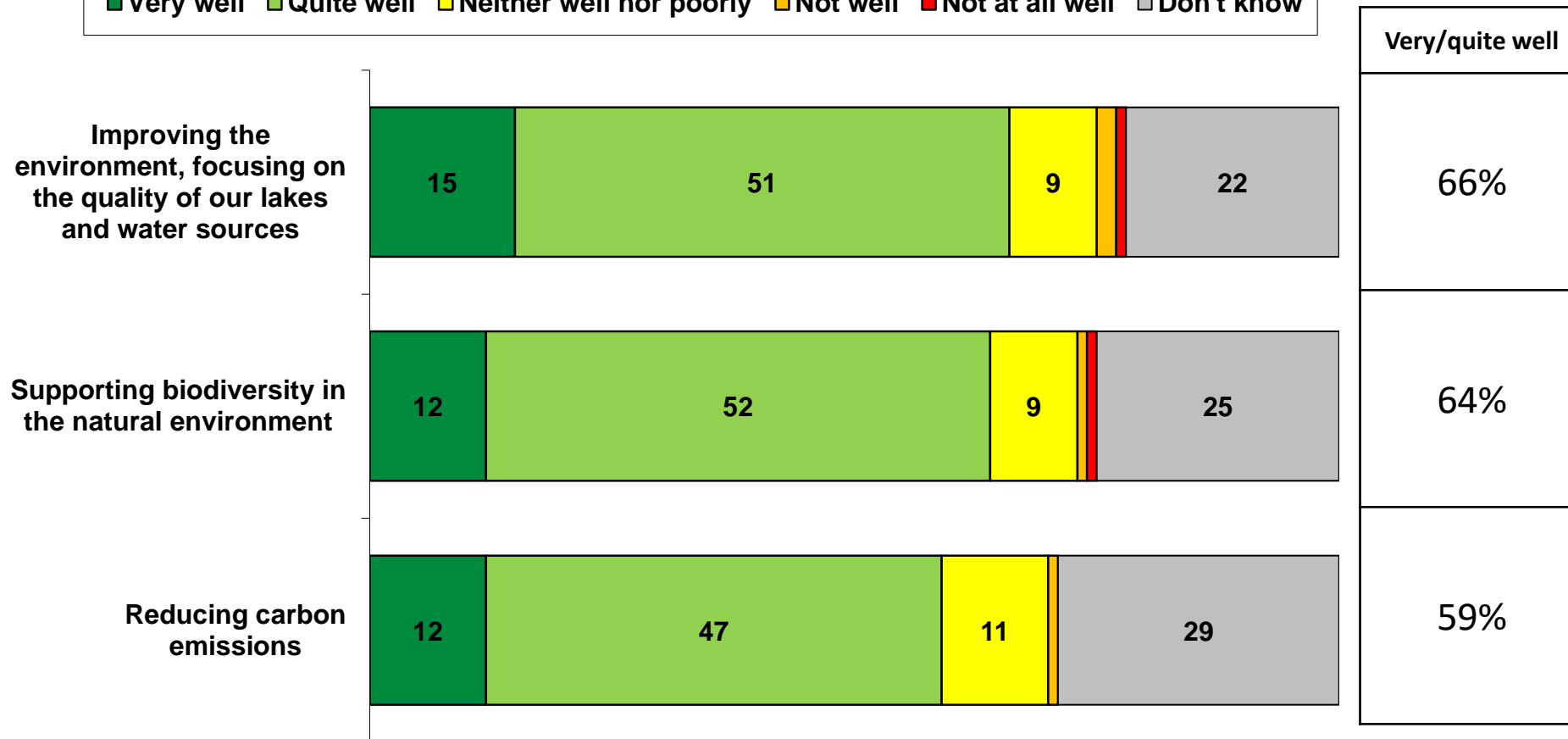
## How important are each of the following environmental efforts for a water company to contribute to? % respondents very/quite important



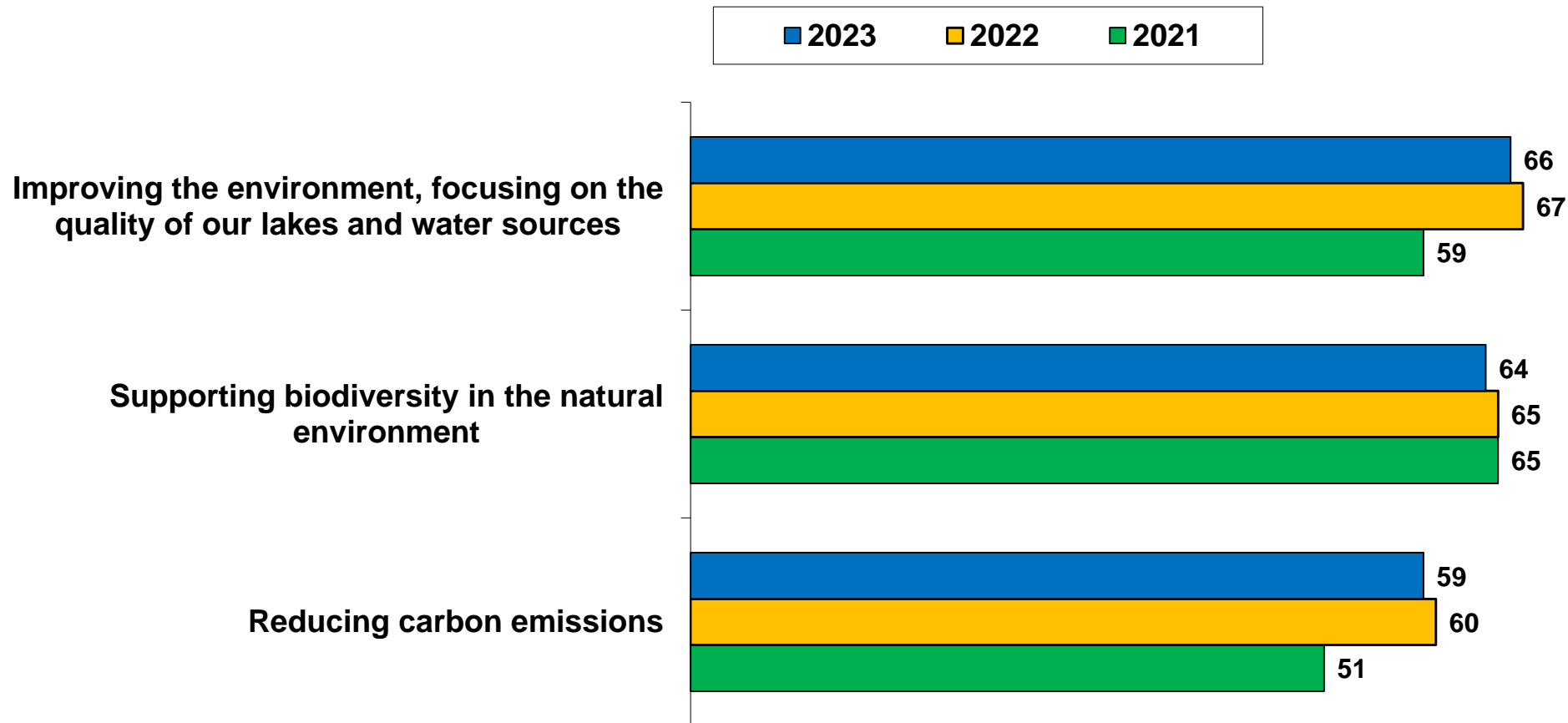


# How well do you think Bristol Water performs against each of the following statements about environmental efforts? % respondents

■ Very well 
 ■ Quite well 
 ■ Neither well nor poorly 
 ■ Not well 
 ■ Not at all well 
 ■ Don't know



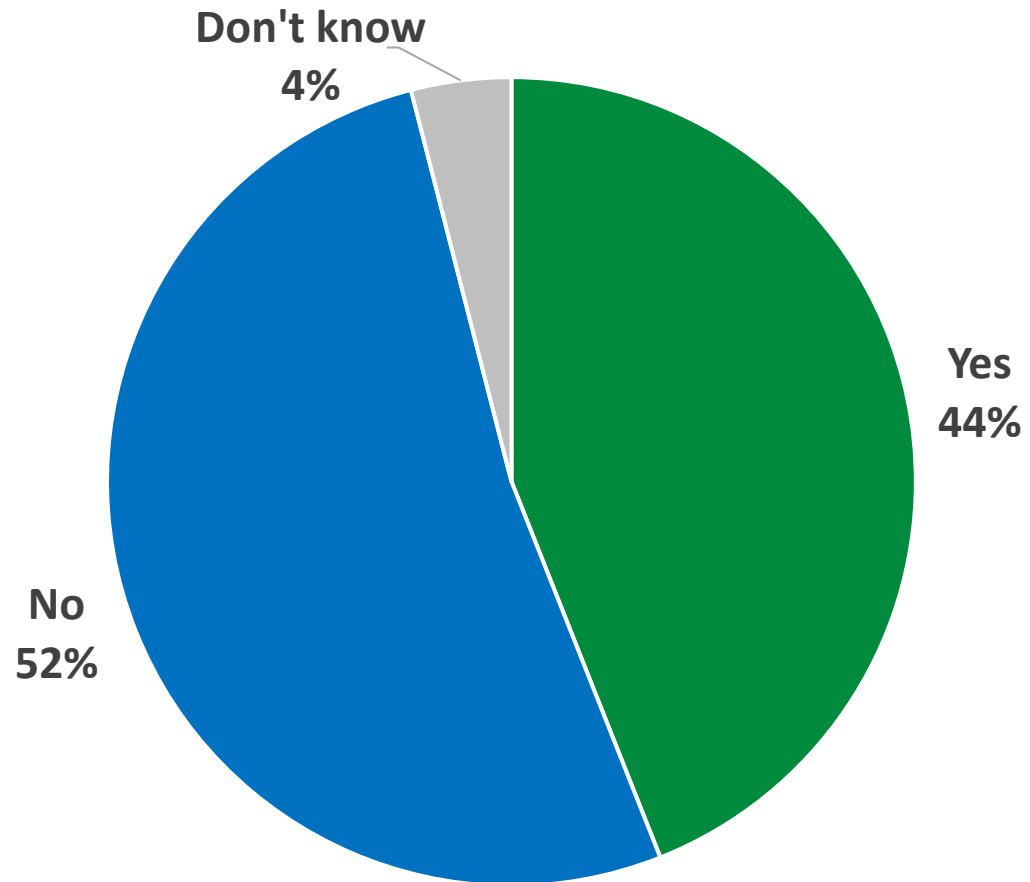
## How well do you think Bristol Water performs against each of the following statements about environmental efforts? % respondents very/quite well



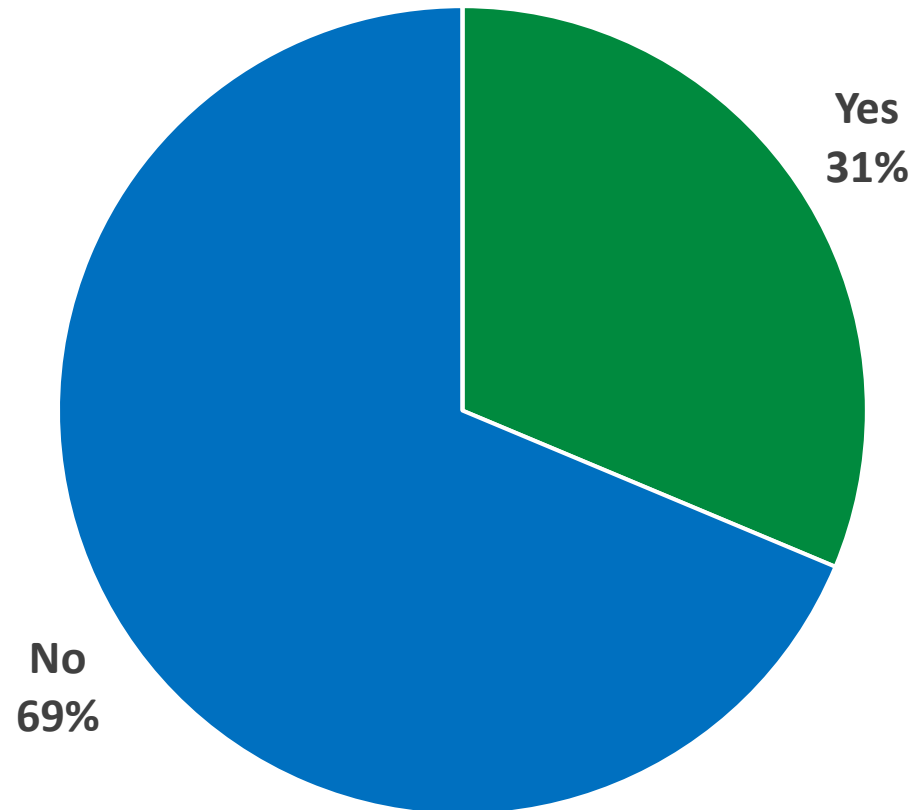
# Respondents information

It's what we're made of.

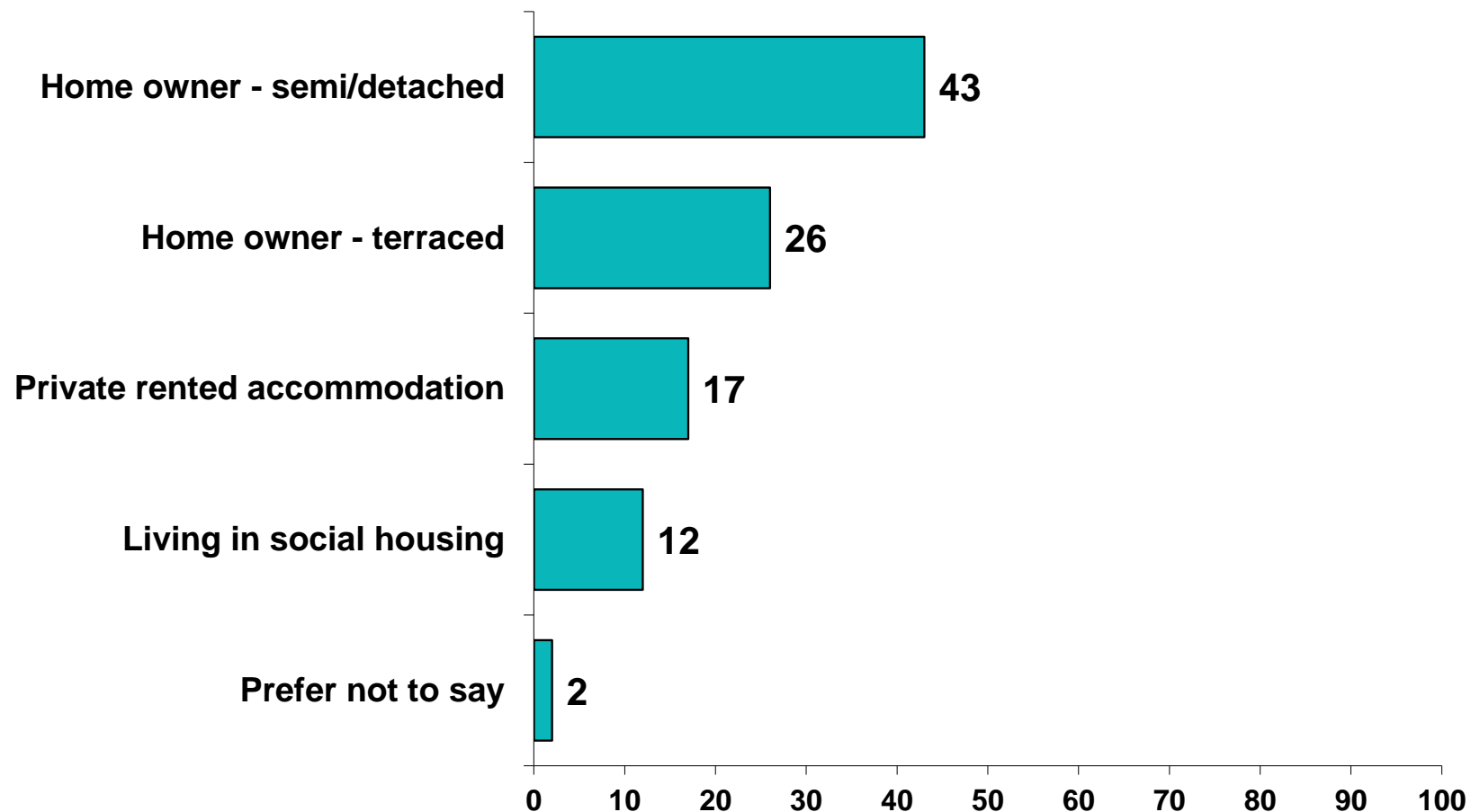
## Water meter



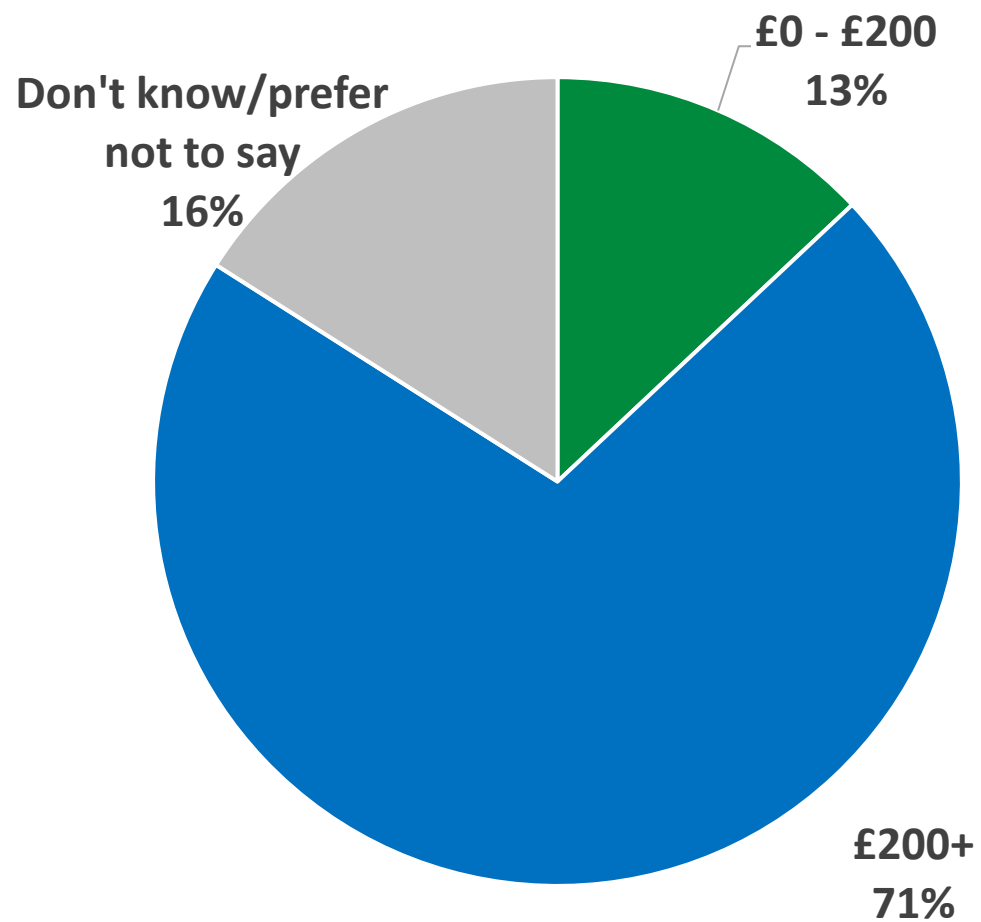
## Dependent children at home



## Current housing status

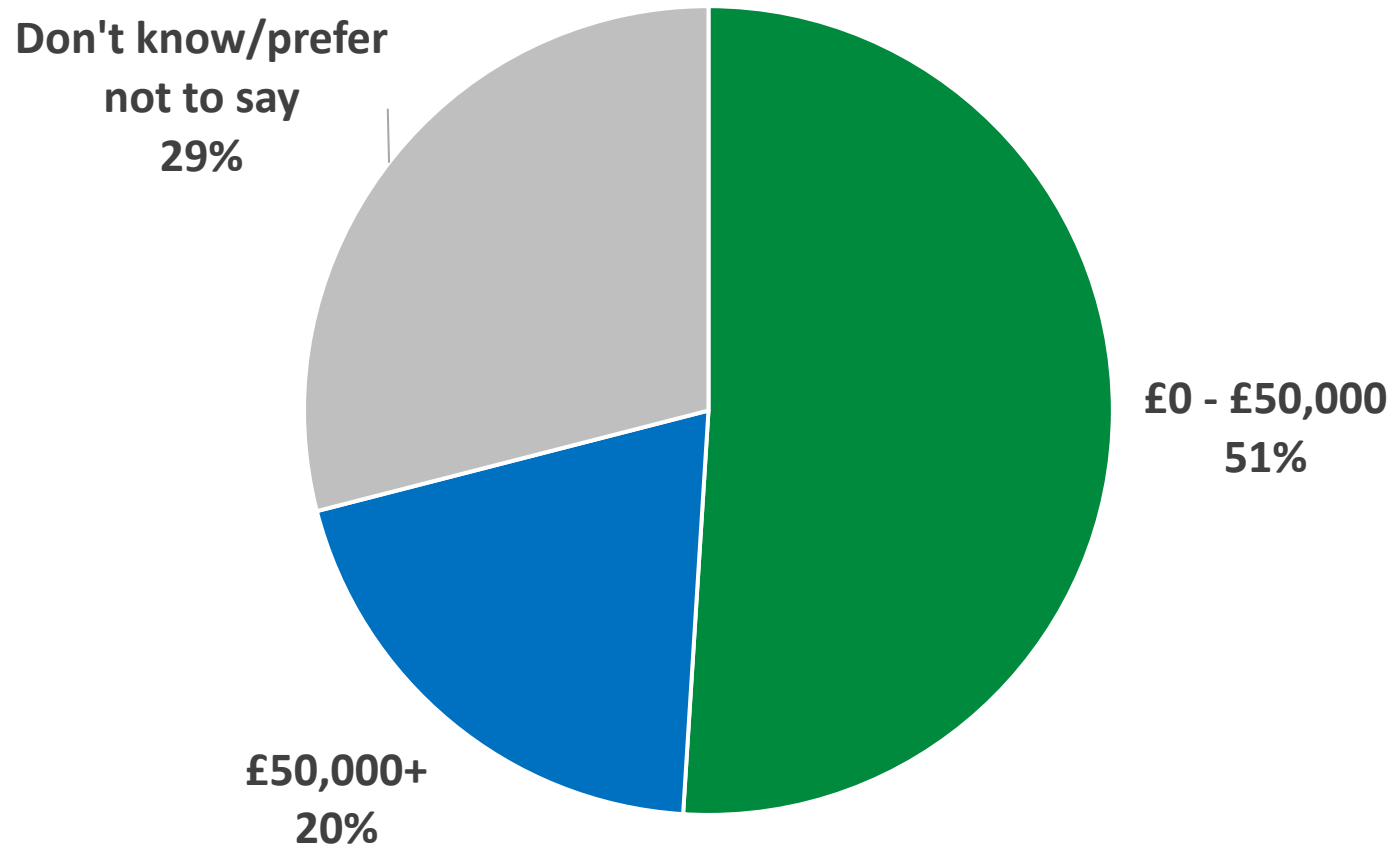


## Average water bill

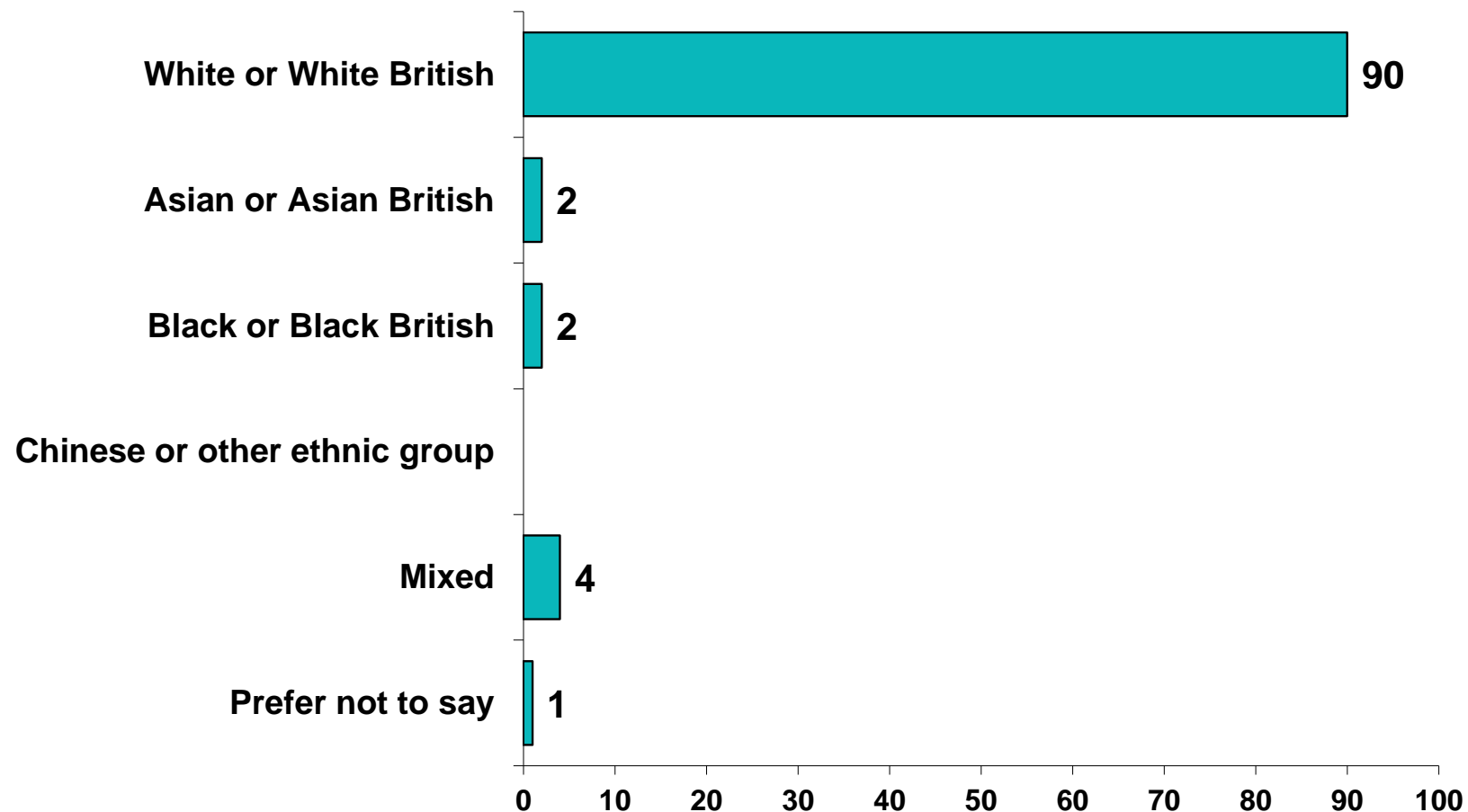




## Household income



## Ethnic group



**Research conducted by:  
Future Focus Research**



**On behalf of:  
South West Water Ltd trading as Bristol Water**

Future Focus Research is a Market and Social Research company in England, Wales and Northern Ireland with offices in Bristol, Cardiff and Belfast.

Established in 1983 we have nearly 40 years experience in helping Public and Private sector organisations with their research requirements. We provide a full range of quantitative and qualitative research services.

We have been working consistently with Bristol Water since 2010 on a range of market research projects.

To get in touch contact: [kelly.jones@futurefocusresearch.co.uk](mailto:kelly.jones@futurefocusresearch.co.uk)



[bristolwater.co.uk](http://bristolwater.co.uk)