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# Tap Water quality perceptions: Survey findings report

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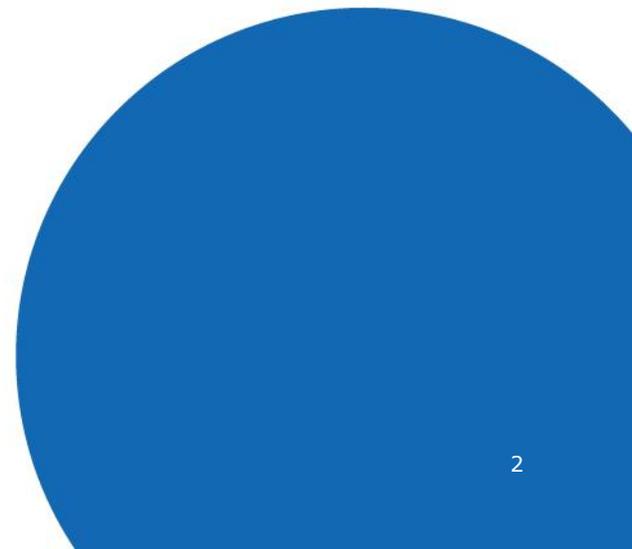
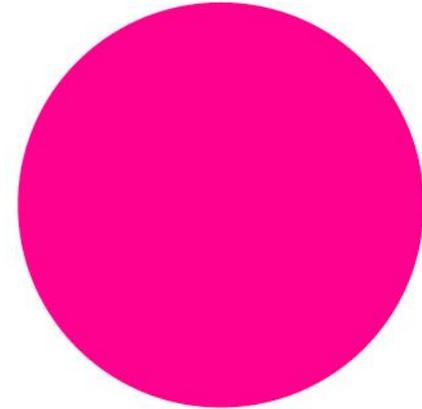
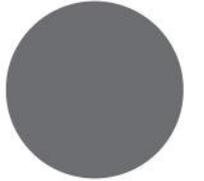
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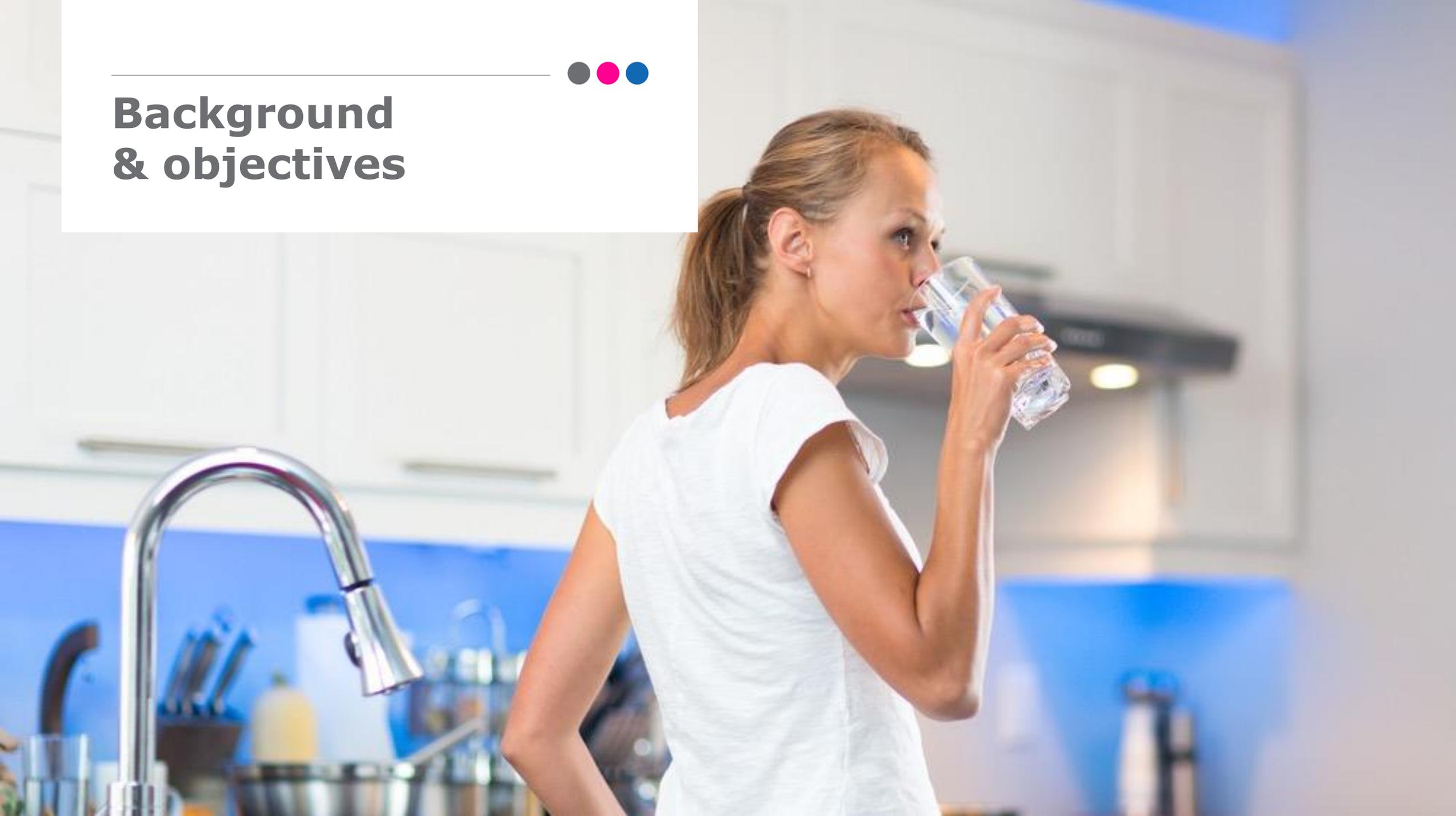
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**Background  
& objectives**





## Background

### Severn Trent provides water and wastewater services to around 8 million people across its region.

The region has traditionally scored well in the 'Water on Tap' water quality measures in CCWater's annual Water Matters survey, with scores aligned with the WaSc average.

Despite this, a small proportion of Severn Trent customers are dissatisfied with their water quality. This is often highlighted in Severn Trent's customer tracker survey results. For example, around 28% of customers mention that they are inconvenienced by limescale. Severn Trent also receive a number of comments related to water quality via Tap Chat, its online research panel, particularly from customers who say their tap water is too hard and should be softened.

Dissatisfaction levels are particularly high in Staffordshire and Shropshire, especially Oswestry and Shrewsbury. Severn Trent thinks this is down to the source of this area's water changing several times over recent decades.

Severn Trent sometimes has to change the source of customers' tap water to meet the demand for water. This may involve changing a source from soft water to harder water or a blend of the two. Customers are not necessarily informed of these changes. They may or may not notice differences in their water.

Going forward, Severn Trent may need to switch customers' water sources more often and for longer periods of time to balance supply and demand. This will impact on water quality attributes.

To this end, Severn Trent commissioned a survey to measure customers' perceptions of tap water quality and their views on switching water sources. The Severn Trent team were keen to compare the views of customers in Oswestry and Shrewsbury with the regional view and to collect the views of NHH (business) customers in Oswestry and Shrewsbury too.



# Objectives

The main aim of the research was **to measure customers' perceptions of water quality and views on switching water sources** comparing the views of household customers across the region with those in Oswestry and Shrewsbury, as well as those of NHH customers in this area. More specifically, the research had the following objectives:

## 1. Perceptions of water quality

- Satisfaction levels with taste, smell, appearance and latherability
- The extent to which water quality impact KPIs
- Preferences for harder or softer tap water and key reasons

## 2. Complaints about water quality

- Reasons for dissatisfaction
- Experience when making complaints
- Reasons for not complaining

## 3. Switching water sources

- Perceptions about whether water source/water quality remains the same or changes over time
- Views on switching water sources
- Acceptability of Severn Trent switching their water source for different reasons (e.g. a burst pipe)

## 4. Improving water quality

- Expectations for Severn Trent to improve water quality

## 5. Communication

- Understand whether customers would like to be kept informed about changes to water sources
- Preferred communication channels if they wish to be kept informed about changes to water sources

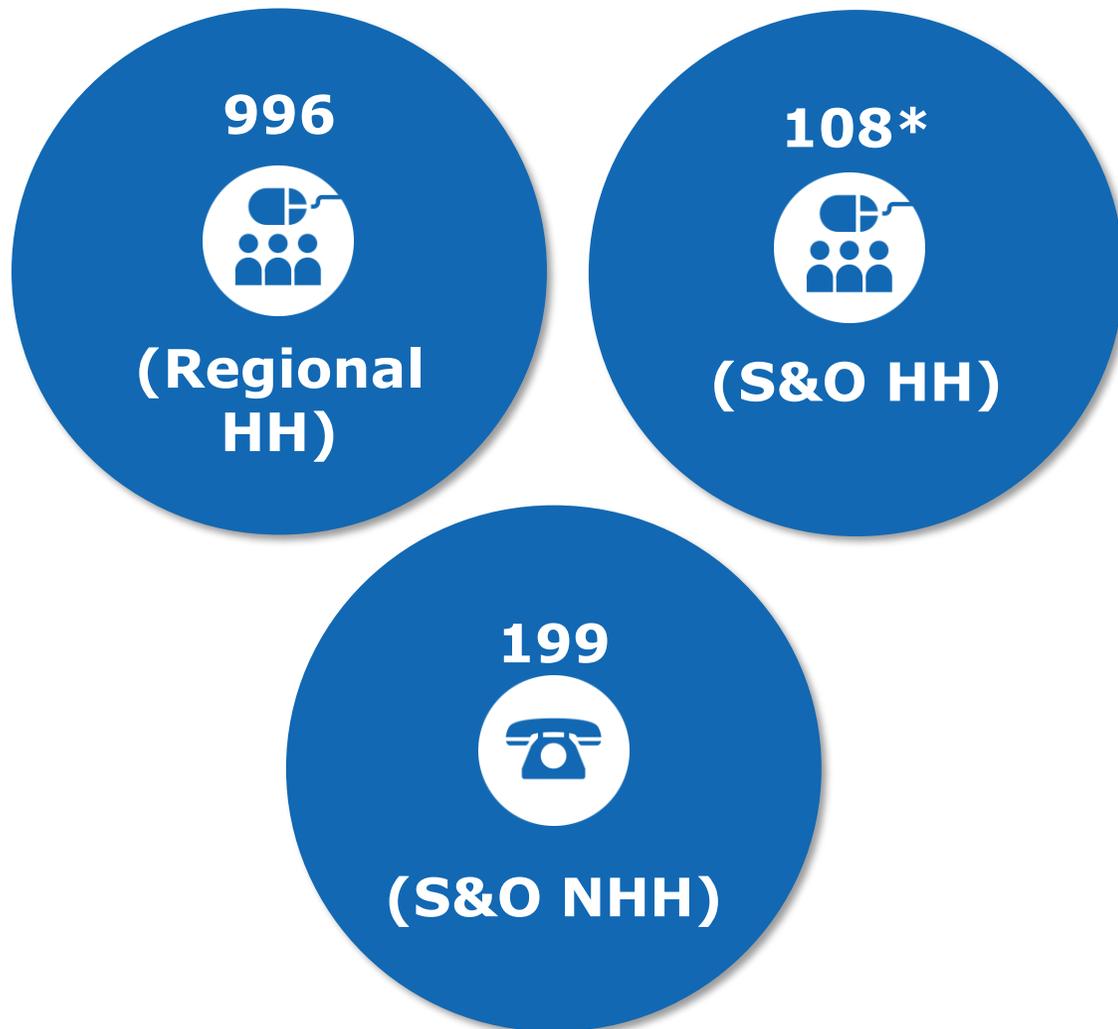
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# Methodology





## Methodology



- This report compares the regional survey results with the Shrewsbury & Oswestry household (S&O HH) and non household (S&O NHH) samples.
- We also highlight any differences between sub-groups (e.g. demographics) for the larger regional sample.
- Fieldwork took place between February and March 2022.
- To ensure the sample was representative of Severn Trent's customer profile, the HH samples were both weighted by gender, age and socio-economic group.
- The regional sample was additionally weighted by hardness/softness of water and whether households were metered or not.
- The non household sample was weighted by business size.
- The sample size for S&O HH was low due to availability of contacts from Severn Trent. Severn Trent serves 52,000 households but Severn Trent was only able to share 2,925 contacts with DJS Research. This is because the majority of customers do not opt in to 'marketing' and secondly, because Severn Trent do not ask about taking part in research separately.
- Due to the small sample size for S&O HH, the results in this report should be treated as indicative only.

\*Response rate for S&O HH was 4%.



# Key points

1 The majority of all households consider their tap water to be safe and claim to drink it.

2 Satisfaction with the taste of their tap water is notably lower in both Shrewsbury & Oswestry samples (69% HH and 66% NHH). This compares to 77% in the regional sample.

3 Regionally, tap water appearance is most likely to drive overall satisfaction with Severn Trent. In Shrewsbury & Oswestry, hardness of water is the greatest driver of overall satisfaction.

4 Issues with limescale are more likely to be reported in the Shrewsbury and Oswestry area. Almost a third of NHH's have a great deal of limescale and 21% of households. This compares to 16% of households regionally.

5 Nearly eight in ten (78%) regional customers add squash or flavouring to their water before drinking it cold. This proportion is lower in Shrewsbury & Oswestry (70%).

6 More than one in six regional households empty their kettle before making hot drinks. This increases to almost a half (47%) in the Shrewsbury and Oswestry area.

7 Over a quarter of Shrewsbury & Oswestry households experience some variations in taste (28%) and appearance (26%). This compares to 21% regionally.

8 29% of Shrewsbury and Oswestry households drink still bottled water at home. This compares to 37% regionally.

9 Use of products for hard water is relatively low. Around three quarters of regional and S&O customers do not use any filtering or softening mechanisms.

10 A high proportion agree that they shouldn't need to filter (70%) or buy products to soften their tap water (65%). These results are similar in S&O.



# Key points

11

Only 1 in 20 of all respondents think its unacceptable for their tap water to come from a different source.

12

The majority of respondents feel it is acceptable to switch water supply for all of the prompted reasons including in a prolonged dry period and to help prevent restrictions such as a hosepipe ban in other parts of England.

13

At least eight in ten respondents agree that Severn Trent should soften tap water but most don't want to contribute to the cost of this.

14

Only a small proportion have complained to Severn Trent about their water quality. Of those that have, they are most likely to live in hard water areas.

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Around a fifth of household customers (both regional and S&O) are 'very likely' to contact Severn Trent if they notice a slight change in smell or appearance.

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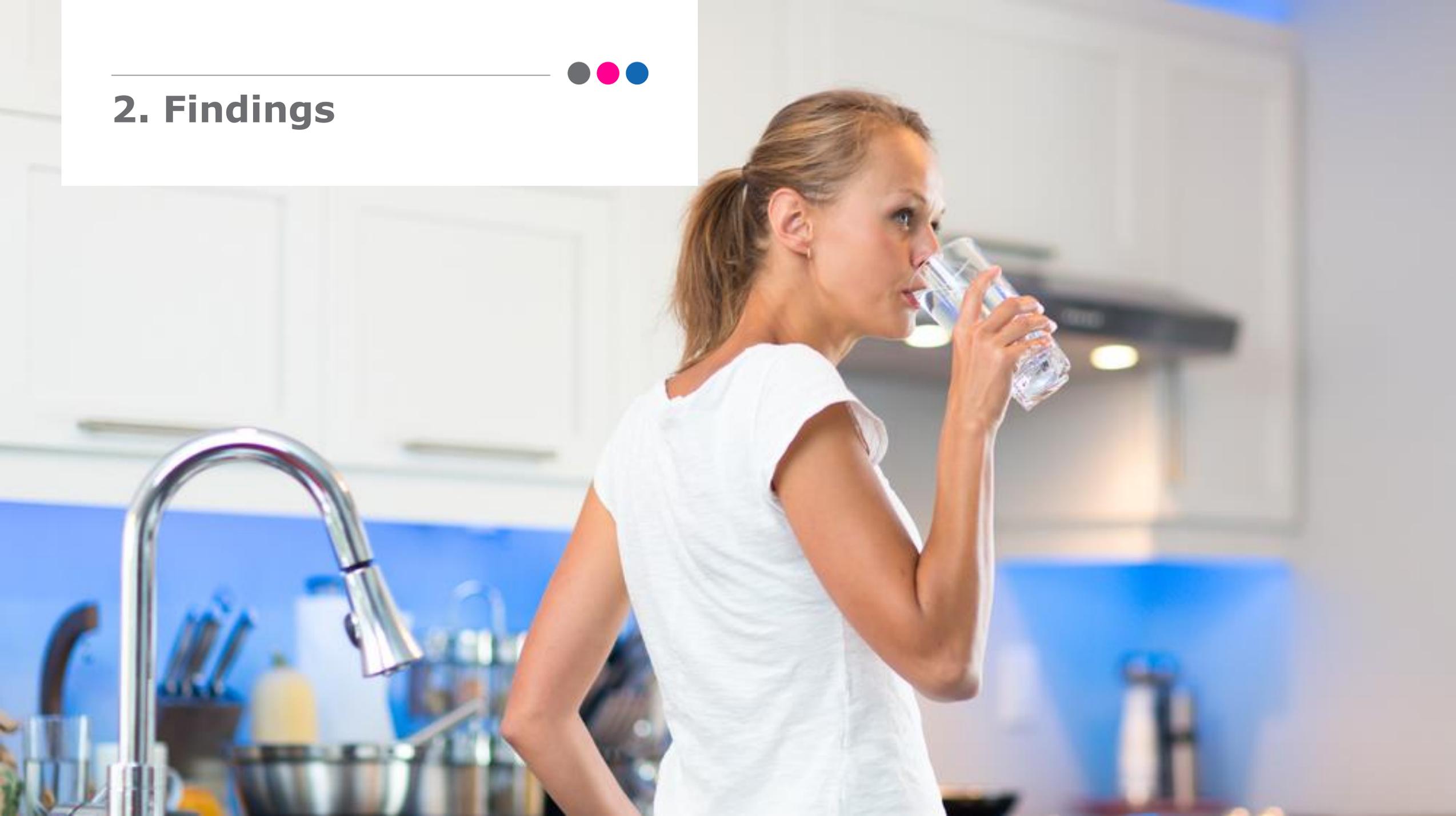
Around nine out of ten household customers indicate that they would like to be kept informed if Severn Trent needs to change the source of their water supplies.

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The majority of household customers (regional and S&O) would prefer to be kept informed about these changes by email.

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## 2. Findings



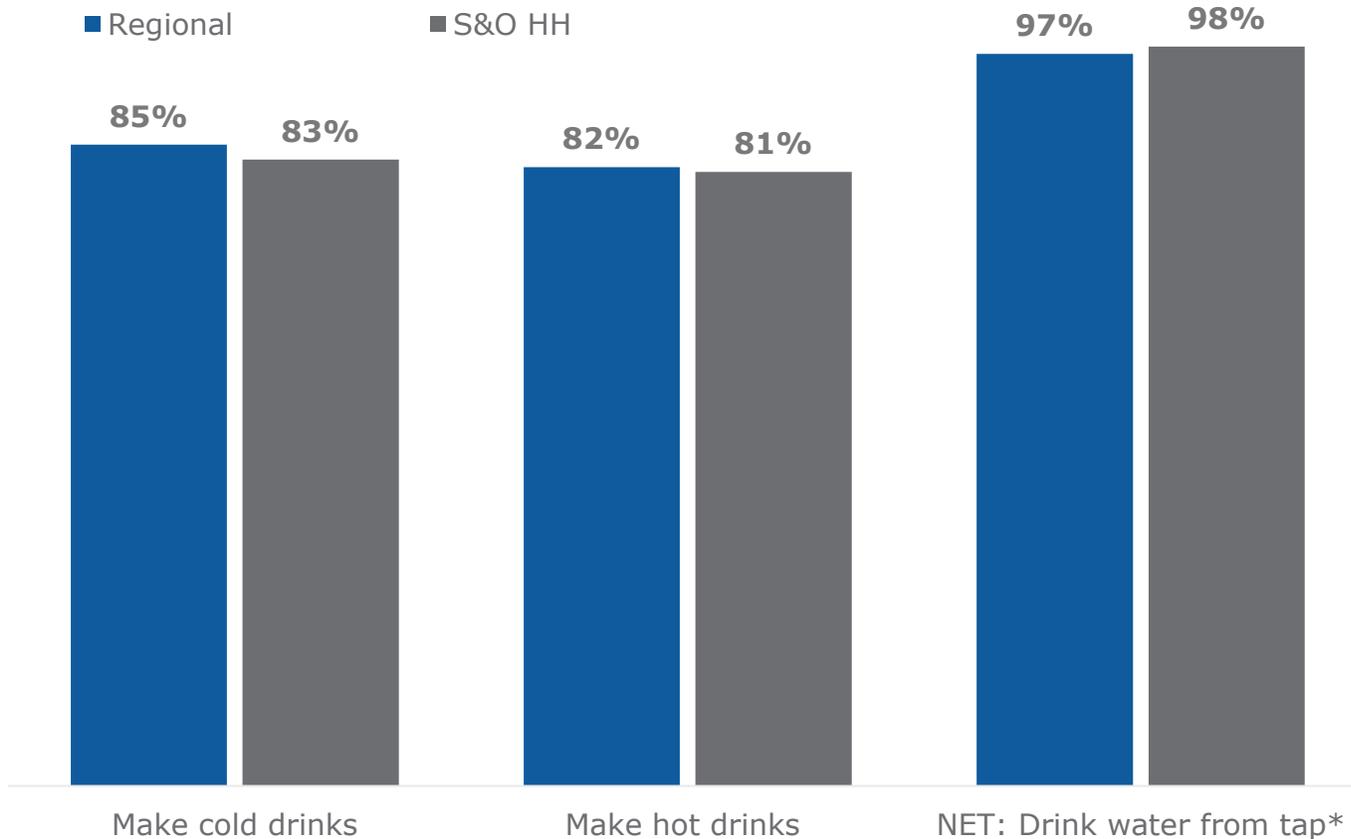
# **General views on tap water**



# The majority (97%) of regional households drink tap water at home, either hot or cold. 15% do not drink cold water from the tap

The results are similar in the Shrewsbury and Oswestry area.

## Drink tap water at home



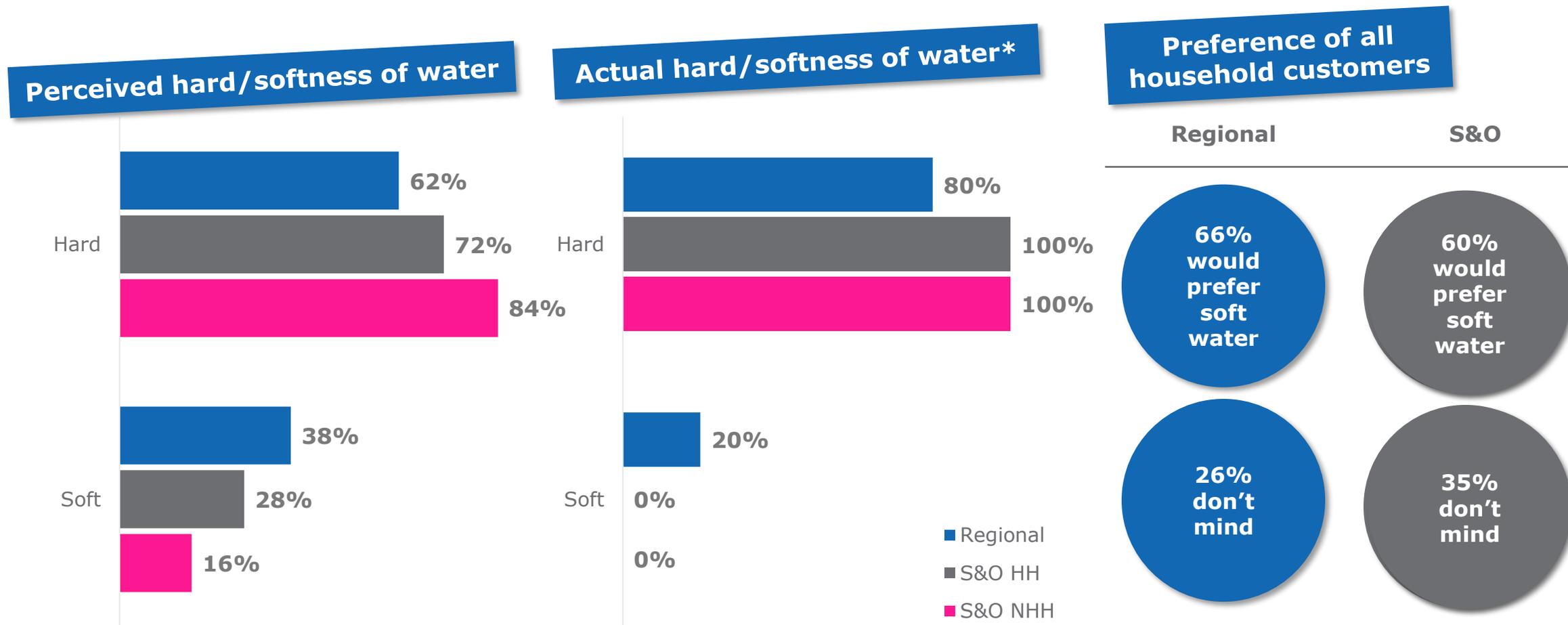
### Further analysis (regional HH sample only):

- 3% do not drink water from the tap, this figure is higher amongst those who are dissatisfied with the appearance (17%), taste (19%), smell (21%) and/or who feel their water is unsafe (38%).



# Perceived hardness of water is lower than actual hardness across both samples (regional and S&O HH). Households would also prefer softer water

Non households appear to be more aware of the hardness/softness of their tap water.



**Base:** All respondents 524-996 (S&O 47-108, NHH 135-199) excluding don't know and neither options. **Q17:** How would you describe your tap water? & **Q18:** If you had a choice about the hardness or softness of the water supplied to your home/business, which would you prefer? \*Actual hard and softness of water is based on data provided by Severn Trent.



## Perceived hardness of tap water is highest in Gloucestershire and Shropshire (excluding Shrewsbury and Oswestry) and lowest in the West Midlands

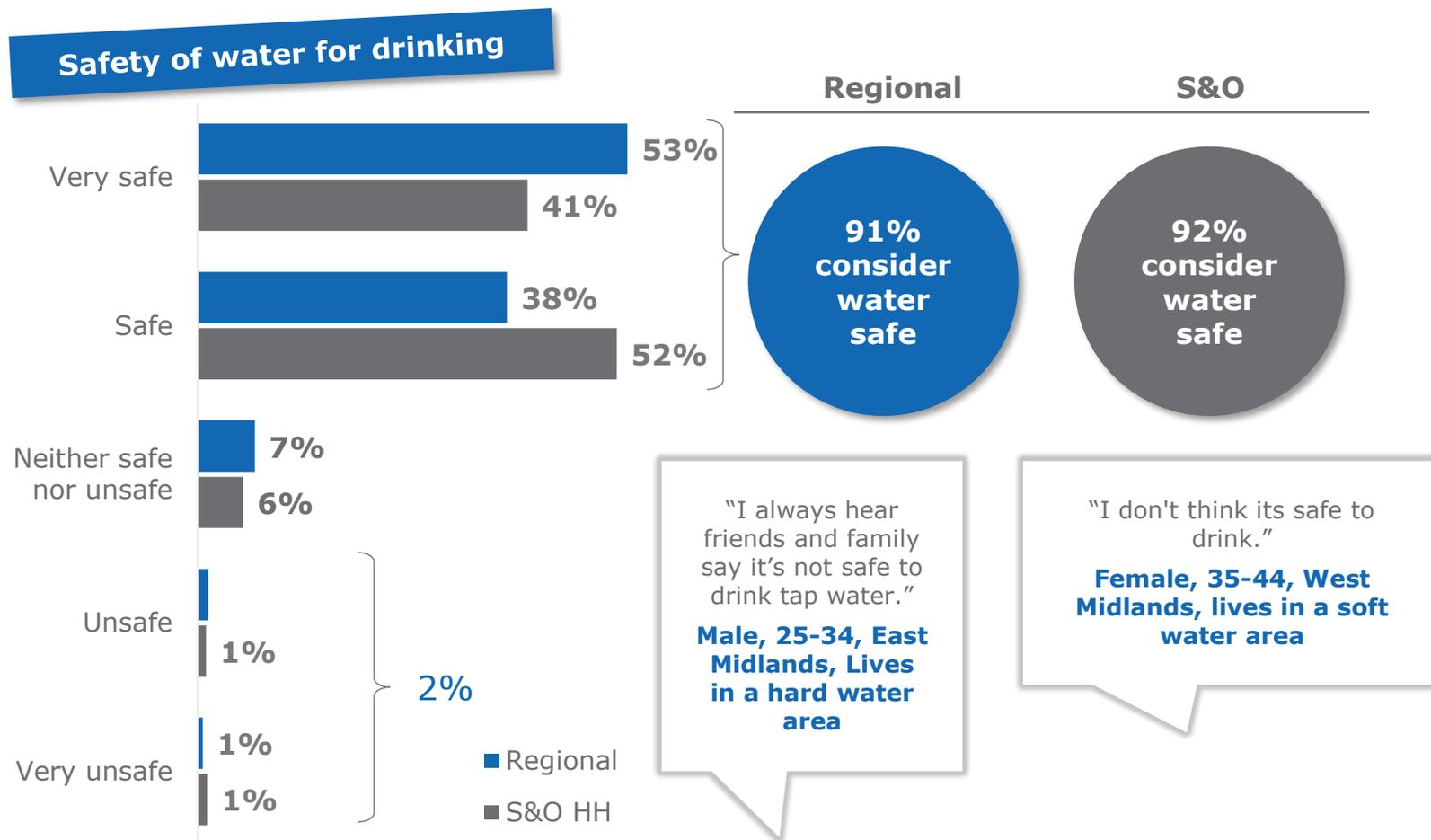
### Hardness or softness of water supplied by county

County	Hard	Soft
Gloucestershire*	96%	4%
Shropshire (excluding Shrewsbury & Oswestry)*	96%	4%
Staffordshire	85%	15%
Warwickshire	84%	16%
<i>Shrewsbury &amp; Oswestry</i>	<i>72%</i>	<i>28%</i>
Derbyshire	69%	31%
Leicestershire	68%	32%
Nottinghamshire	60%	40%
Worcestershire	63%	37%
West Midlands	37%	63%



## 2% of regional and S&O households consider their tap water unsafe but around 1% still drink it at home

The regional sample suggests that this is significantly higher amongst those who are new to the area (6%) and dissatisfied with appearance or smell (both 26%).



### Further analysis (regional HH only):

- Residents in Worcestershire (97%) are most likely to consider their tap water to be safe to drink, compared to 86% in Warwickshire.
- Those who consider themselves to live in a soft water area (95% vs 89% in a hard water area).
- Residents aged 65+ (96%) are more likely than those aged 35-44 (85%) to consider their water to be safe.
- Residents who consider water to be unsafe are more likely to be dissatisfied with the appearance (26%), taste (16%) and smell (26%) of their water.
- Those who drink bottled water at home (3% vs.1% who do not) are more likely to consider their water to be unsafe.

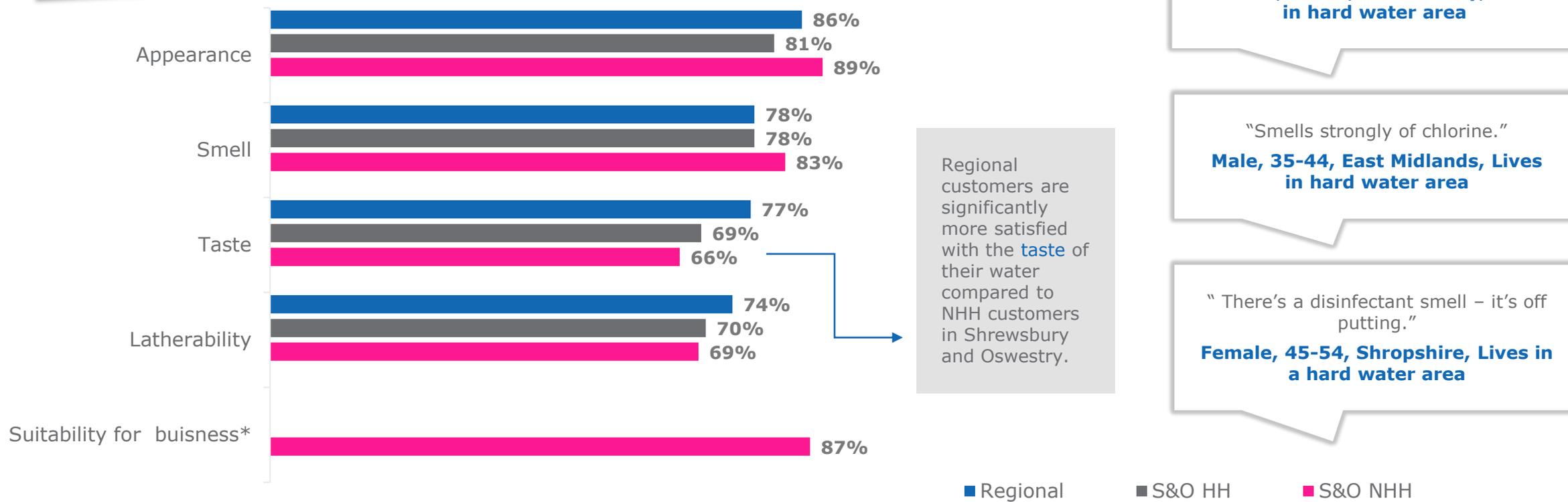
# **Views on water quality**



## Around one quarter of regional households are dissatisfied with the smell and taste of their tap water

Satisfaction is notably lower for **taste** in both Shrewsbury & Oswestry samples. Satisfaction with **appearance** appears to decrease the longer residents have lived in their area (96% less than 3 years vs. 80% 16-20 years).

### Satisfaction with aspects of water quality (1)



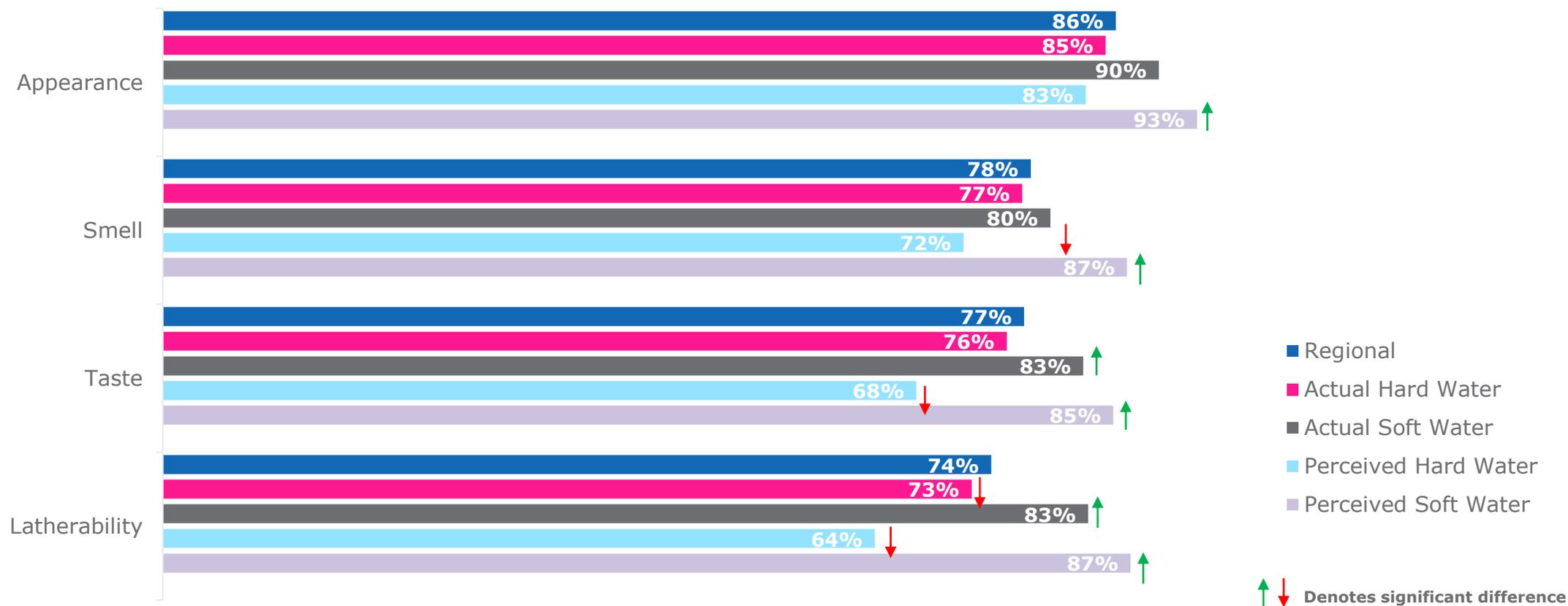
**Base:** All respondents 995 (S&O 108, NHH 199), excluding don't know. **Q07:** How satisfied or dissatisfied are you with the following aspects of your tap water? Satisfaction defined as Very satisfied or Satisfied.\*Option included in the non-household survey only.



# Those in soft water areas are generally more satisfied with aspects of their water

When it comes to **taste** and **latherability**, those in soft water areas are *significantly more* satisfied with their water.

## Satisfaction with aspects of water quality (2)

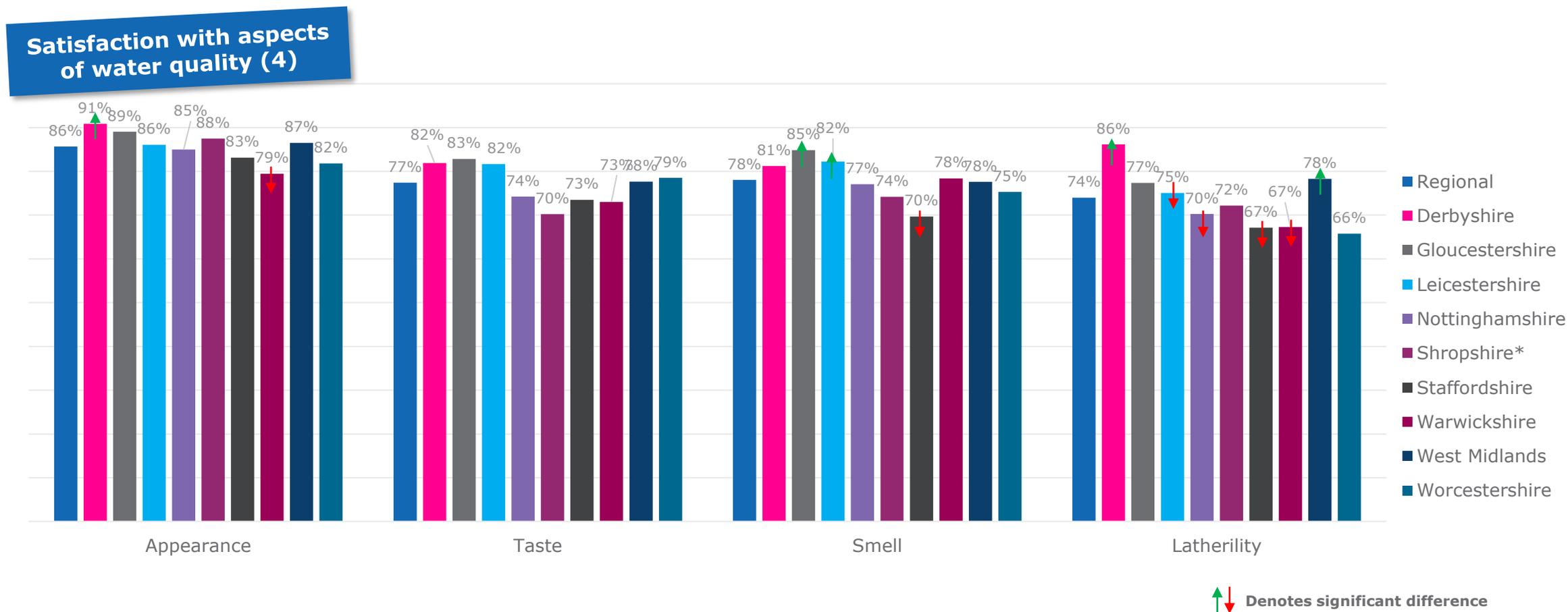


**Base:** All respondents 995, excluding don't know. **Q07:** How satisfied or dissatisfied are you with the following aspects of your tap water? Satisfaction defined as Very satisfied or Satisfied.\*Option included in the non-household survey only.



## There are some geographical differences with perceptions of tap water

Those in Derbyshire are more satisfied with the appearance of their water than those in Warwickshire. Those in Gloucestershire and Leicestershire are more satisfied with the **smell** than those in Staffordshire.



**Base:** All respondents 36-251 excluding don't know. **Q07:** How satisfied or dissatisfied are you with the following aspects of your tap water? Satisfaction defined as Very satisfied or Satisfied. \*Excluding S&O



## KPI scores are lower in S&O households than across the region as a whole

### Satisfaction with the overall service provided by Severn Trent:

Regional (75%)

Shrewsbury & Oswestry HH (63%)

Shrewsbury & Oswestry NHH (80%)

### Severn Trent provides value for money

Regional (60%)

Shrewsbury & Oswestry HH (47%)

### Severn Trent has a good reputation

Regional (68%)

Shrewsbury & Oswestry (48%)



# Key Driver Analysis: explaining relative importance

Regression models are used to examine the extent to which each of the key drivers influence overall satisfaction. The relative importance score is a measure of how much the driver influences overall satisfaction. It also allows us to identify how much more influential a driver is compared to another and improves understanding of the strength of the influence of each.

## Measuring how much the driver influences employee engagement:

- The higher the score, the greater the influence: the driver with the highest importance score is the one that has the greatest influence on employee engagement.
- In the example in the table, driver A has the greatest influence on overall satisfaction compared to all other drivers.
- The relative importance allows us to rank each of the key drivers in terms of their influence over overall satisfaction.

## Comparing drivers' influence between each other:

- Driver A has a relative importance of 0.20 which means that it is twice as influential on overall satisfaction than the third and fourth ranked drivers C and D with a relative importance of 0.10.
- It is also three times as influential as the fifth driver E with a relative importance of 0.07.

## Improving our understanding of how strong the influence is:

The relative importance score improves our understanding of the strength of the influence of each driver – so rather than just looking at the ranking, we can see that the third and fourth drivers have very similar levels of influence, whilst there is a big difference between the level of influence of the top driver (driver A) and the driver at the bottom (driver E).

Rank	Driver	Relative importance
1	driver A	0.20
2	driver B	0.12
3	driver C	0.10
4	driver D	0.10
5	driver E	0.07



## Regionally, water appearance is most likely to drive overall satisfaction with Severn Trent: Regional HH

At a regional level, satisfaction with water quality has an impact on overall satisfaction with Severn Trent. The most influential factor is 'Satisfaction with appearance of tap water'. People who are satisfied with appearance tend to report high satisfaction overall. This should therefore be an area for Severn Trent to focus on when looking to make improvements, particularly focusing on the cohort in slide 20 (e.g. those who have only lived in their property for a short period) who are more likely to be dissatisfied with appearance.

Rank	Questions	Relative importance	Performance measure
1	Q7: Satisfaction with appearance	0.283	NET: Satisfied
2	Q7: Satisfaction with latherability	0.188	NET: Satisfied
3	Q7: Satisfaction with smell	0.061	NET: Satisfied
4	Q17: How would you describe your water?	0.083	NET: Do not have hard or very hard water



## In Shrewsbury & Oswestry, hardness of water is the greatest driver of overall satisfaction: S&O

The table below shows the top two key drivers of overall satisfaction in Shrewsbury and Oswestry. The most influential factor is 'hard tap water'. People who do not think they have hard water tend to report higher overall satisfaction with Severn Trent. Notably, taste is the second driver of satisfaction. The survey results also indicate that Shrewsbury and Oswestry households are less satisfied with this aspect and therefore should be a key area of focus for Severn Trent.

Rank	Questions	Relative importance	Performance measure
1	Q17: How would you describe your tap water?	0.326	Not hard or very hard
2	Q7: Satisfaction with taste	0.253	NET: Satisfaction



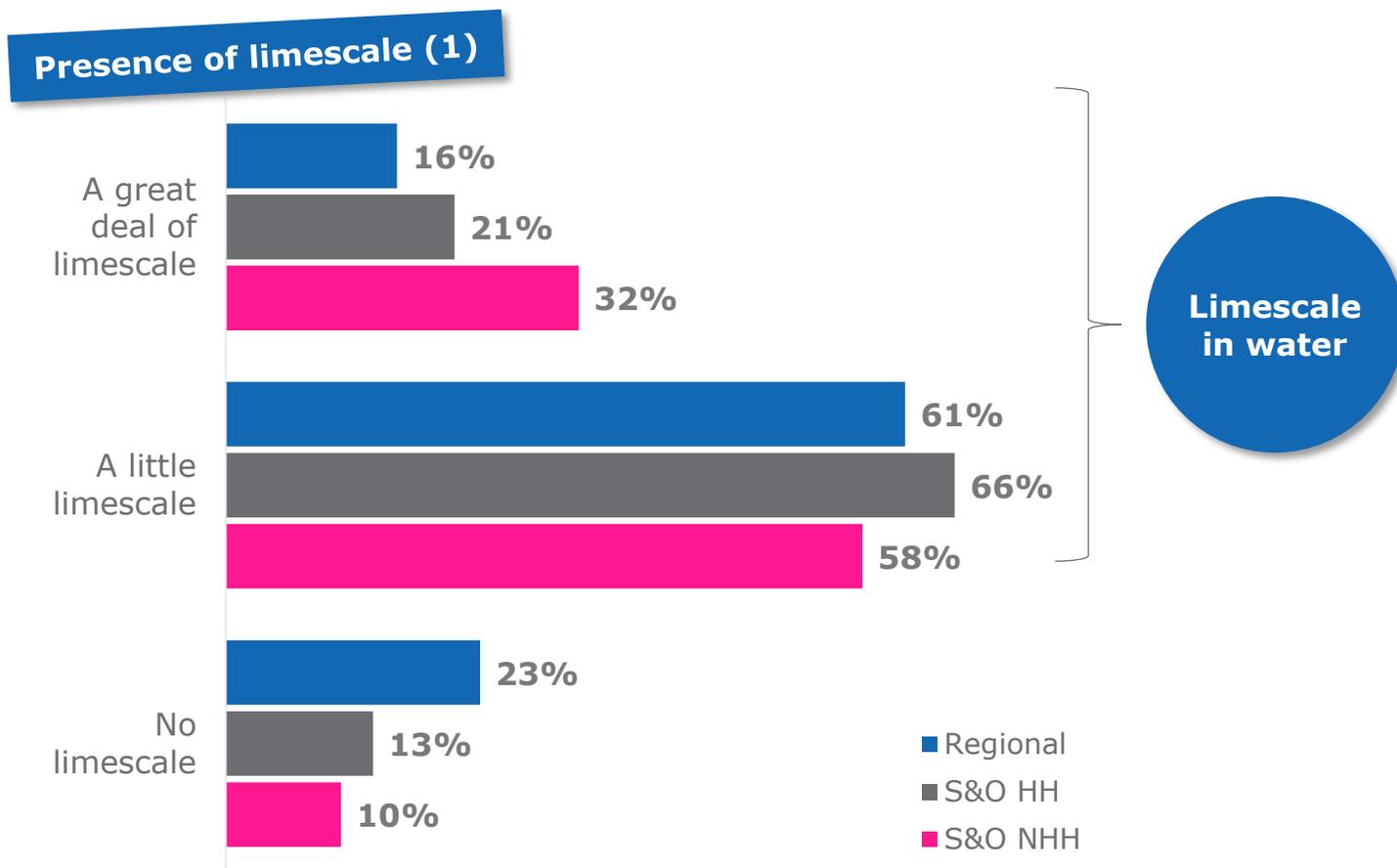
## Latherability, limescale and smell drive overall satisfaction: NHH

The table below shows the top four key drivers of overall satisfaction. The most influential factor is satisfaction with 'Suitability for the ways in which their business/organisation uses water'. NHHs who are satisfied with suitability tend to report high overall satisfaction. The survey results indicate that NHHs are less satisfied with the latherability of their water (potentially linked to hard water/limescale in the Shrewsbury and Oswestry). This may be one area of focus for Severn Trent.

Rank	Questions	Relative importance	Performance measure
1	Q3: Satisfaction: suitability for the ways in which your business or organisation uses water	0.246	NET: Satisfied
2	Q3: Satisfaction with latherability	0.172	NET: Satisfied
3	Q7: Amount of limescale	0.145	% not a great deal
4	Q3: Satisfaction with smell	0.109	NET: Satisfied



## Almost a third of NHHs report that they get a great deal of limescale. This compares to 21% of households living in Shrewsbury and Oswestry and 16% of households regionally



### Further analysis (regional HH sample only):

Satisfaction with tap water quality is highest amongst households who do not think they have limescale. In particular:

- Appearance (93% vs. 83% with limescale)
- Taste (90% vs. 74% with limescale)

### Limescale an inconvenience

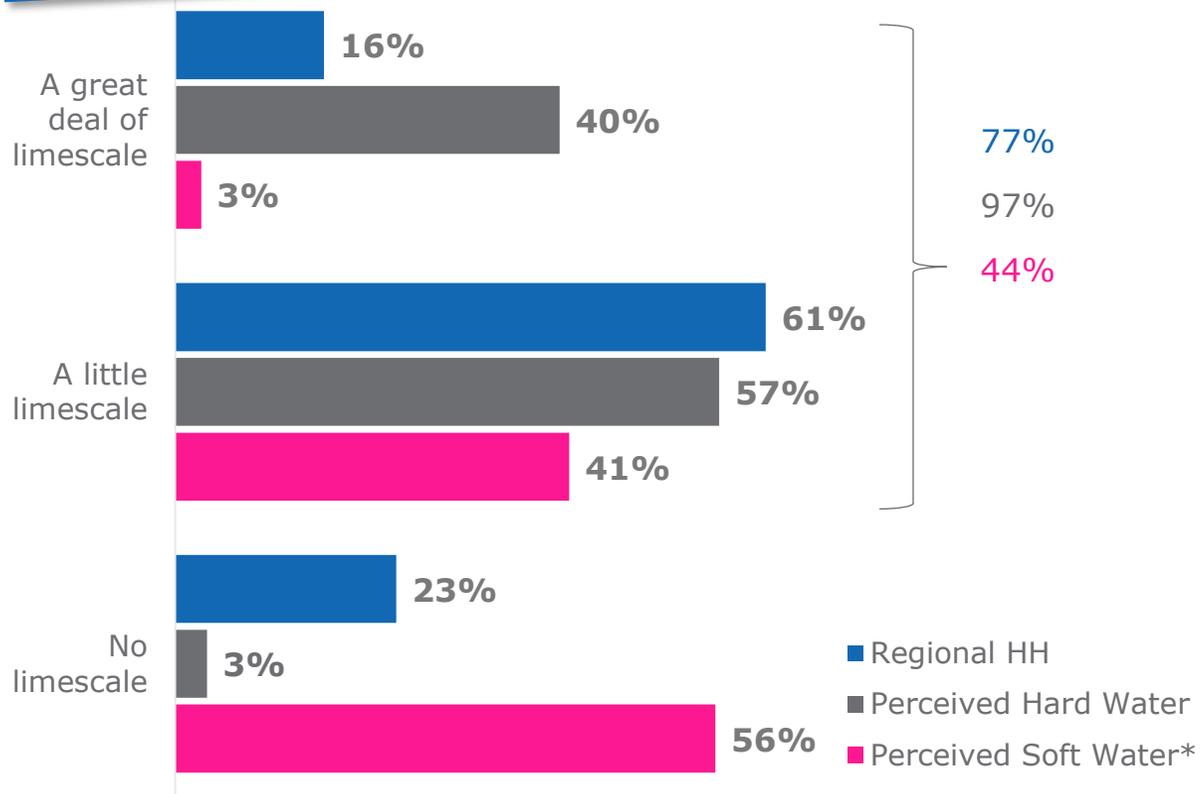
- 67% regional sample who report having limescale consider limescale to be an inconvenience.
- This figure is higher (80%) amongst the Shrewsbury and Oswestry household sample.
- 68% of non households consider limescale to be an inconvenience.

**Base:** All respondents 777-962 (S&O 91-103, NHH 169-192) excluding don't know. **Q010:** How much limescale do you get? & Q011 How much inconvenience does limescale cause?  
\*Excludes Shrewsbury and Oswestry.

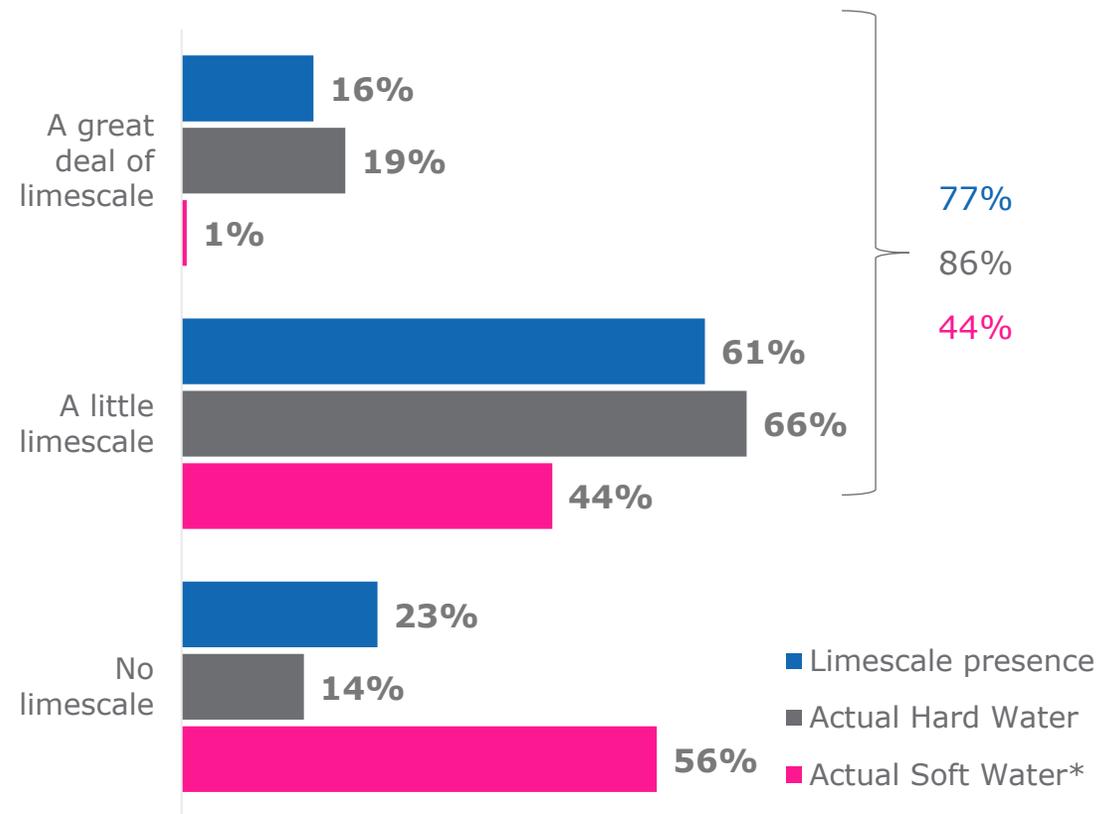


# 97% of customers who think they have hard water have limescale. This decreases to 86% when looking at actual water hardness\*

## Presence of limescale (perceived water type)



## Presence of limescale (actual water type)



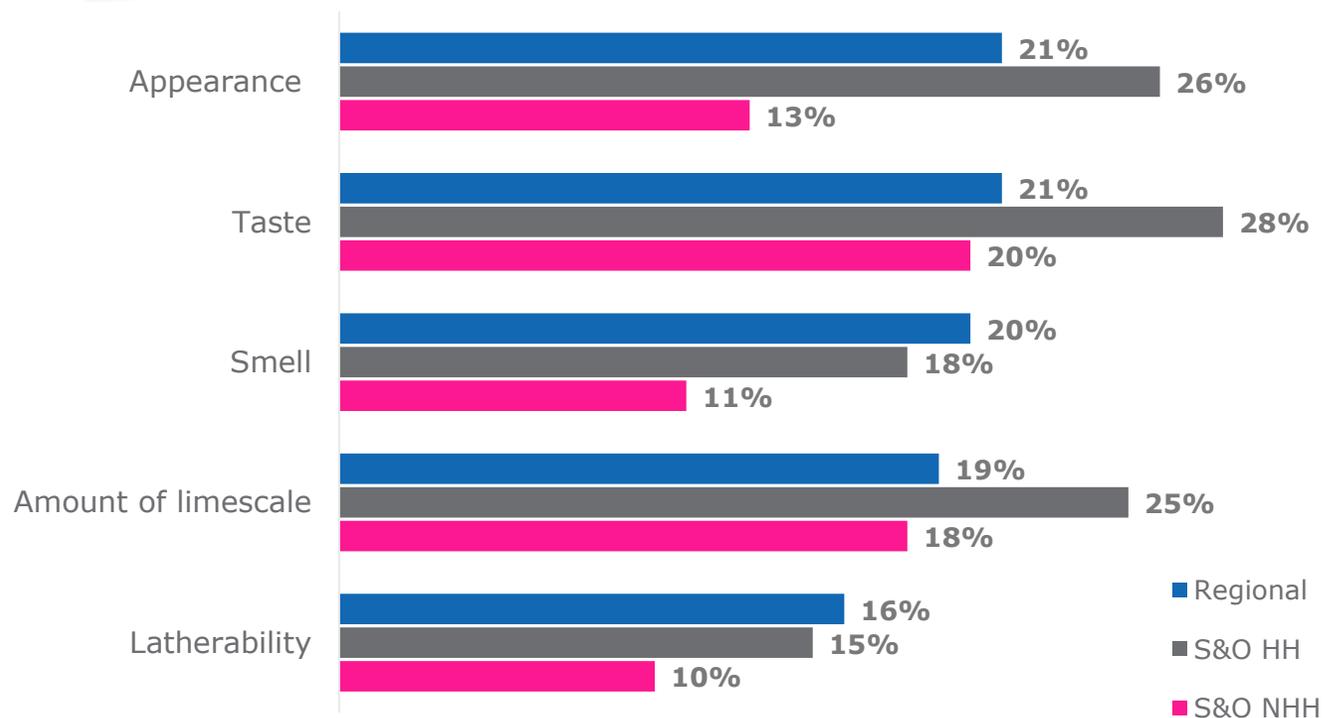
Base: All regional respondents 130-962, excluding don't know. Q010: How much limescale do you get? \*Data provided by Severn Trent.



## Around a fifth of regional customers indicate that their water quality varies

This is particularly the case in terms of appearance and taste (both 21%). Over a quarter experience some variations in taste (28%) and appearance (26%) in Shrewsbury and Oswestry. A fifth of non households experience some variation in taste.

### Variation (little or a lot)



### Further analysis (regional HH sample only):

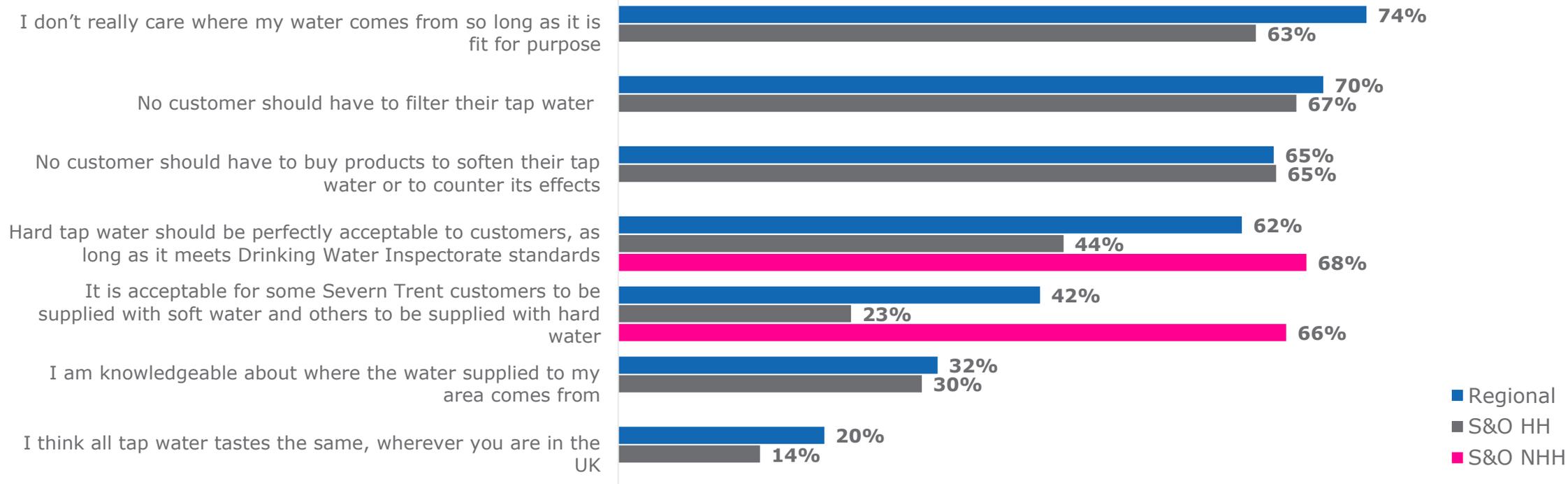
- Residents in Gloucestershire (10%) are less likely to report variations in **appearance** compared to other parts of the region. For example, 26% of households report variations in Nottinghamshire.
- Residents in Gloucestershire (9%) are less likely to report variations in **smell** compared to other parts of the region. For example, 29% of households report variations in Worcestershire.
- Residents in other parts of Shropshire (excluding Shrewsbury and Oswestry, 10%) are least likely to report variations in the **amount of limescale** the get. This increases to 29% in Worcestershire.



## A high proportion agree that they shouldn't need to filter tap water (70%) or buy products to soften their tap water or counter its effects (65%). These results are similar in S&O

NHHs appear to find it more acceptable that water hardness varies, with 66% stating that is acceptable for some customers to be supplied with hard water and others to be supplied with hard water. This compares to 42% regionally and 23% of S&O households.

### Attitudinal statements related to water quality

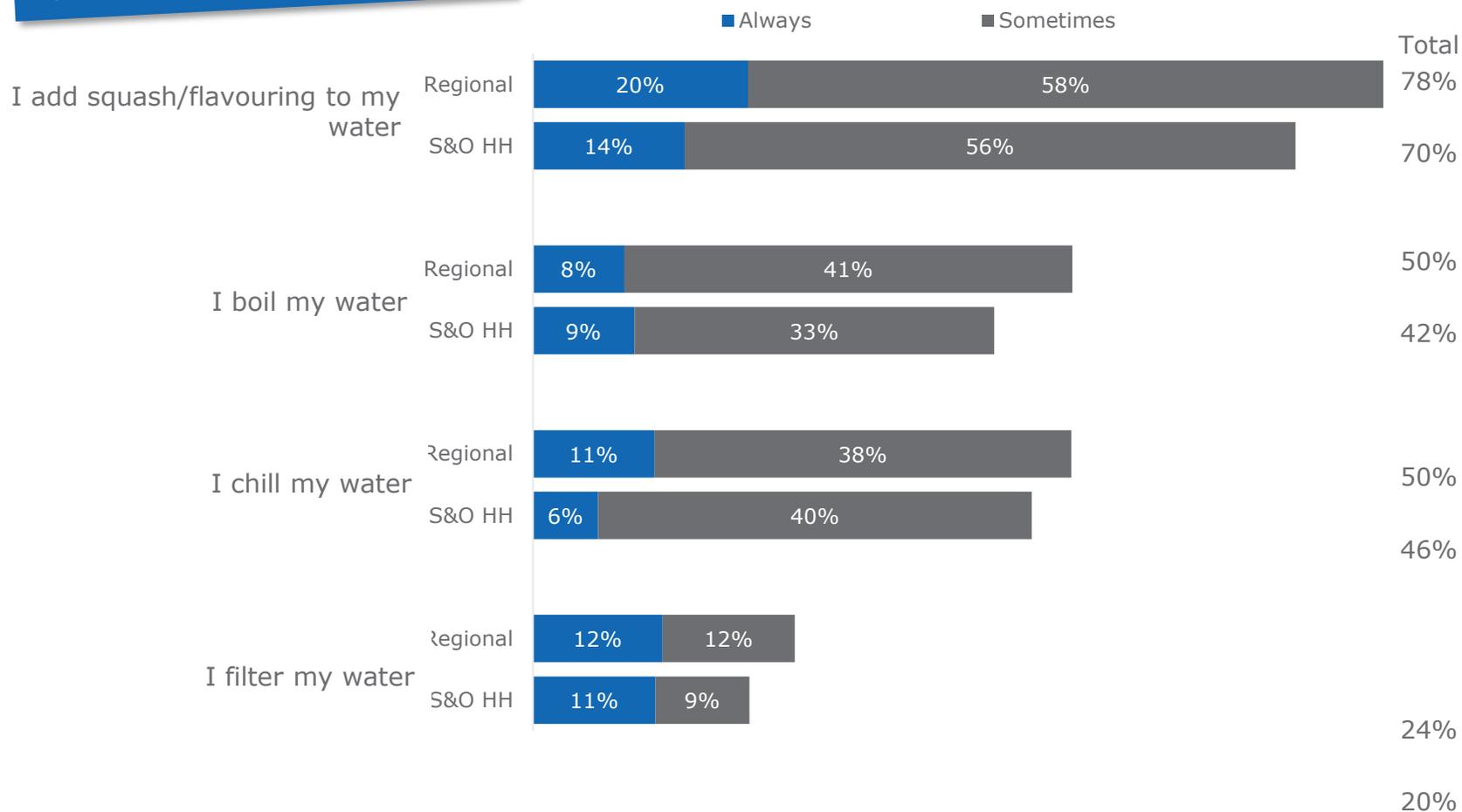


**What do customers do to improve their water quality?**



# Nearly eight in ten (78%) regional customers add squash or flavouring to their water before drinking it cold. There are no significant differences by sample

## Make changes (cold water)



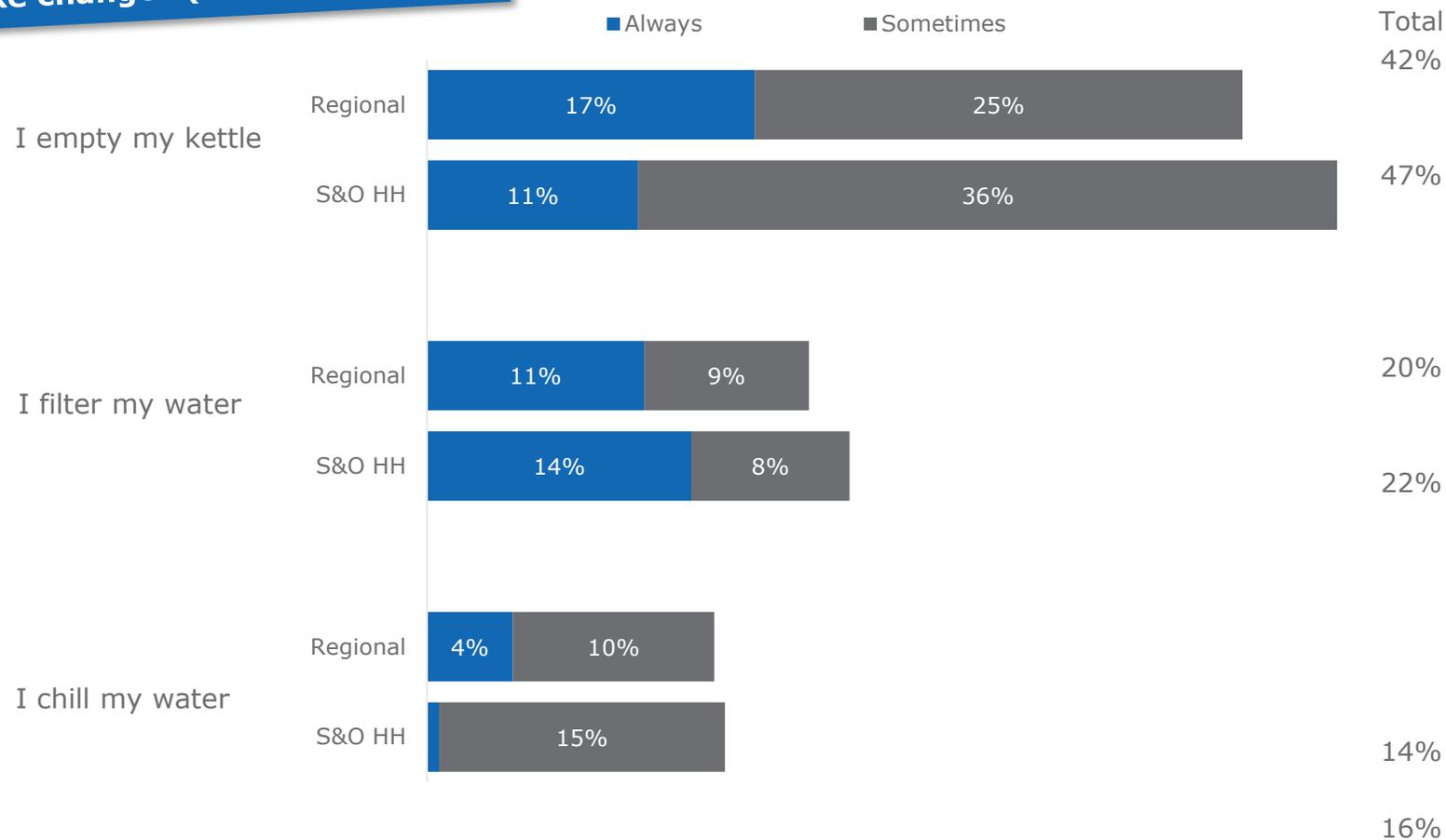
"Years ago it used to taste better - I don't know if the source has changed or the way it is purified. Better when it is filtered."  
**Female, 65+, Shrewsbury, Lives in a hard water area**

"Always refreshing but best served chilled."  
**Male, 55-64, East Midlands, Lives in a hard water area**



## More than one in six regional households empty their kettle before making hot drinks. This behaviour appears to be slightly higher amongst people who live in hard water areas\*

### Make changes (hot drinks)



"We get a lot of limescale so its quite a hardwater area which is why we use a filter before we use the kettle."

**Female, 35-44, Shrewsbury, Lives in a hard water area**

**Base:** All household respondents 828 (S&O 88) who drink hot water, excluding don't know. **Q6:** How often do you do any of the following to your tap water before using it to make hot drinks?  
\*Result not statistically significant.

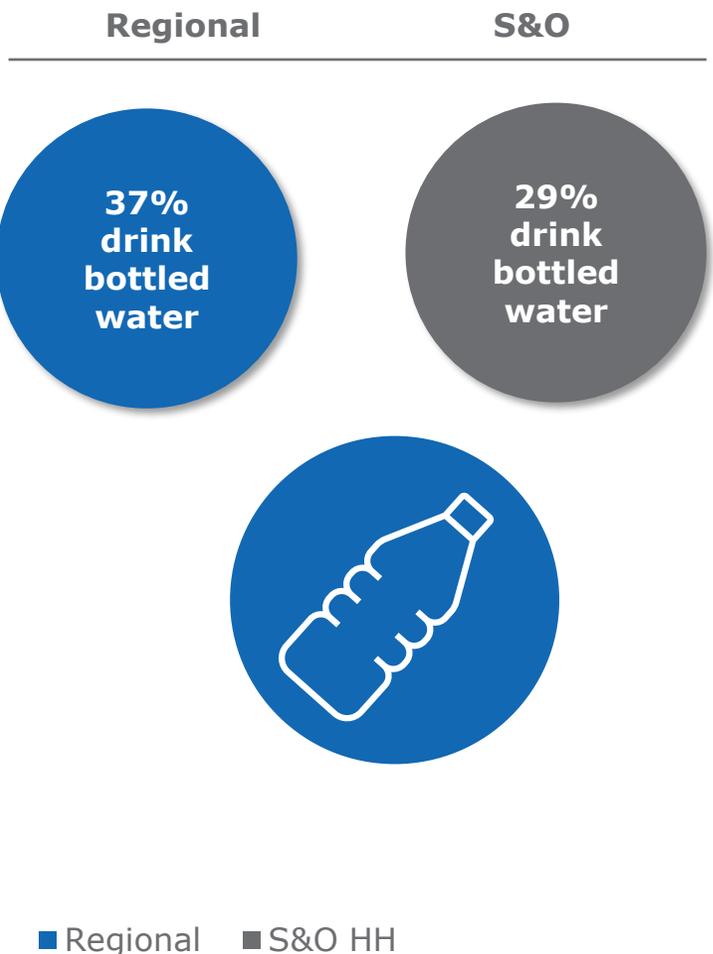
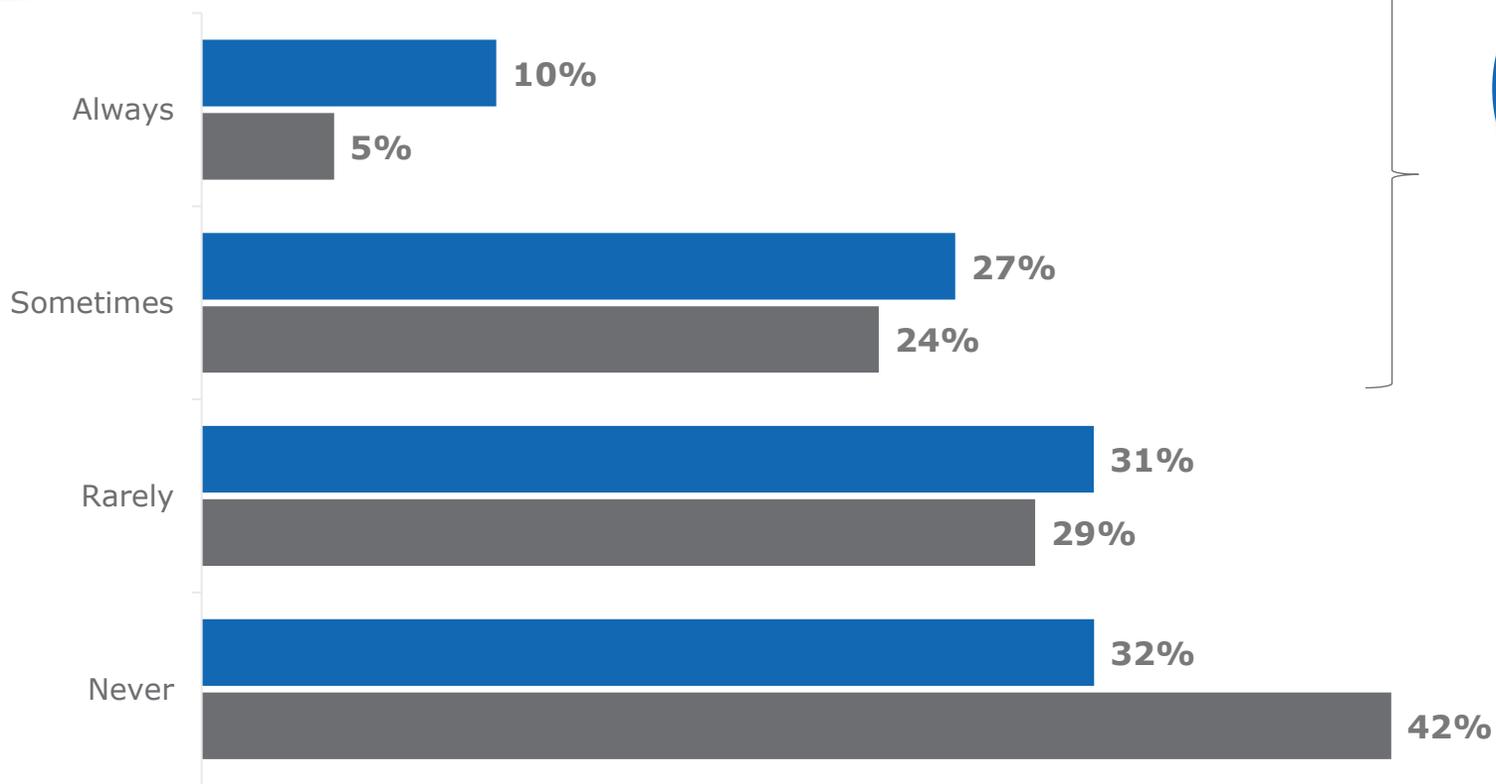


## Regional households are more likely to drink (still) bottled water at home

This compares to 29% in Shrewsbury and Oswestry.

Regionally, residents who are dissatisfied with the taste are most likely to drink (still) bottled water.

### Drinking still bottled water at home

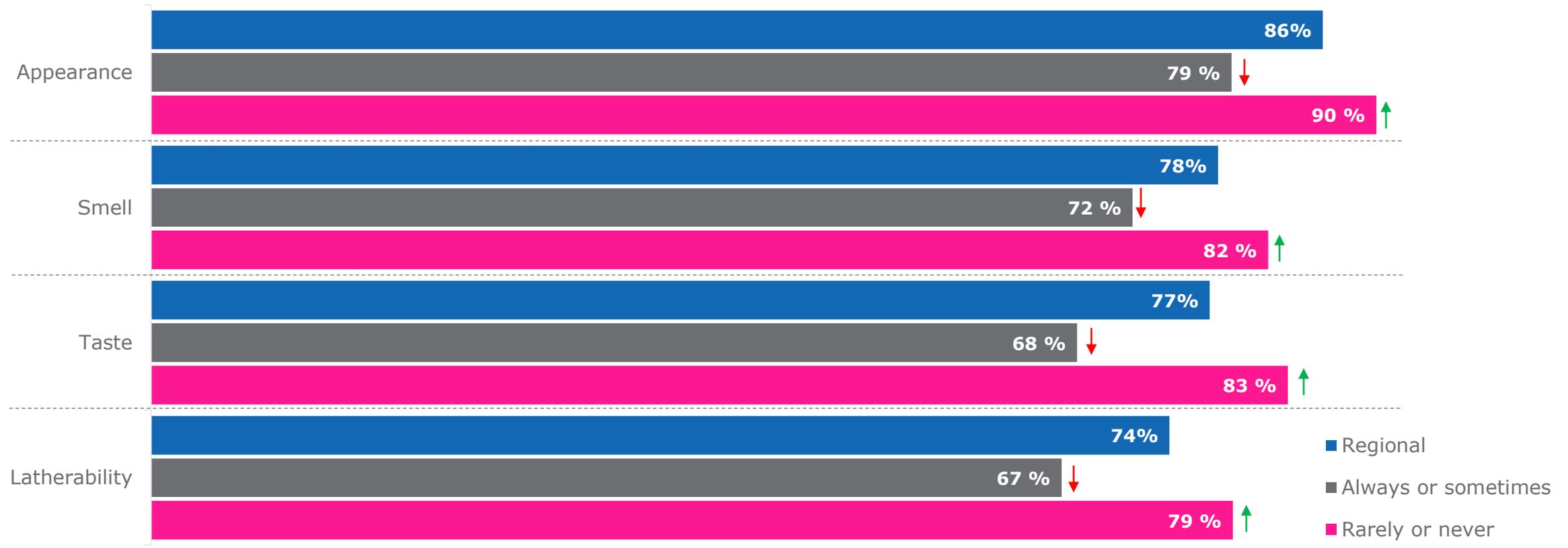


Base: All household respondents 996 (S&O 108) excluding don't know. Q7a: How often, if at all do you drink (still) bottled water at home?\* Excluding Shrewsbury & Oswestry.

# Those who drink bottled water at home, are less satisfied with the taste of tap water



## Satisfaction levels amongst bottled water drinkers



Base: All respondents 359-995, excluding don't know. Q07: How satisfied or dissatisfied are you with the following aspects of your tap water? Satisfaction defined as Very satisfied or Satisfied.



## Usage of products for hard water is relatively low. Around three quarters of regional and S&O customers do not use any of the filtering or softening mechanisms.

Of those who do, almost one fifth of households indicate that they use a water filter jug.

### Methods used for filtering or softening water

	Regional	S&O HH
I use a water filter jug	<b>18%</b>	<b>19%</b>
The water/ice in my fridge is filtered	5%	4%
I use an under sink water filter	2%	2%
I have an electromagnetic water softener	2%	0%
I have a water softening device that uses salt	2%	0%
Other	1%	0%
I don't use any of these	<b>74%</b>	<b>77%</b>

### Significant differences (regional HH sample) only):

- Use of a water filter jug appears to be highest amongst those who consider themselves to have **hard water\*** (19% vs. 12%).
- Use of a water filter jug appears to be highest amongst those who are dissatisfied with the **appearance** of their water (45% vs. 16% satisfied).
- Use of a water filter jug appears to be highest amongst those who are dissatisfied with the **taste** of their water (39% vs. 14% satisfied).



## Around a fifth of households use Calgon or similar to help with hard water

Use of products in Shrewsbury and Oswestry is very similar to the region as a whole.

### Use of specialist products for hard water

	Regional	S&O HH
Calgon or similar	17%	16%
Special cleaning products for hard water	6%	7%
Special toiletries for hard water	5%	3%
Teabags for hard water	4%	2%

### Further analysis differences (regional HH sample) only:

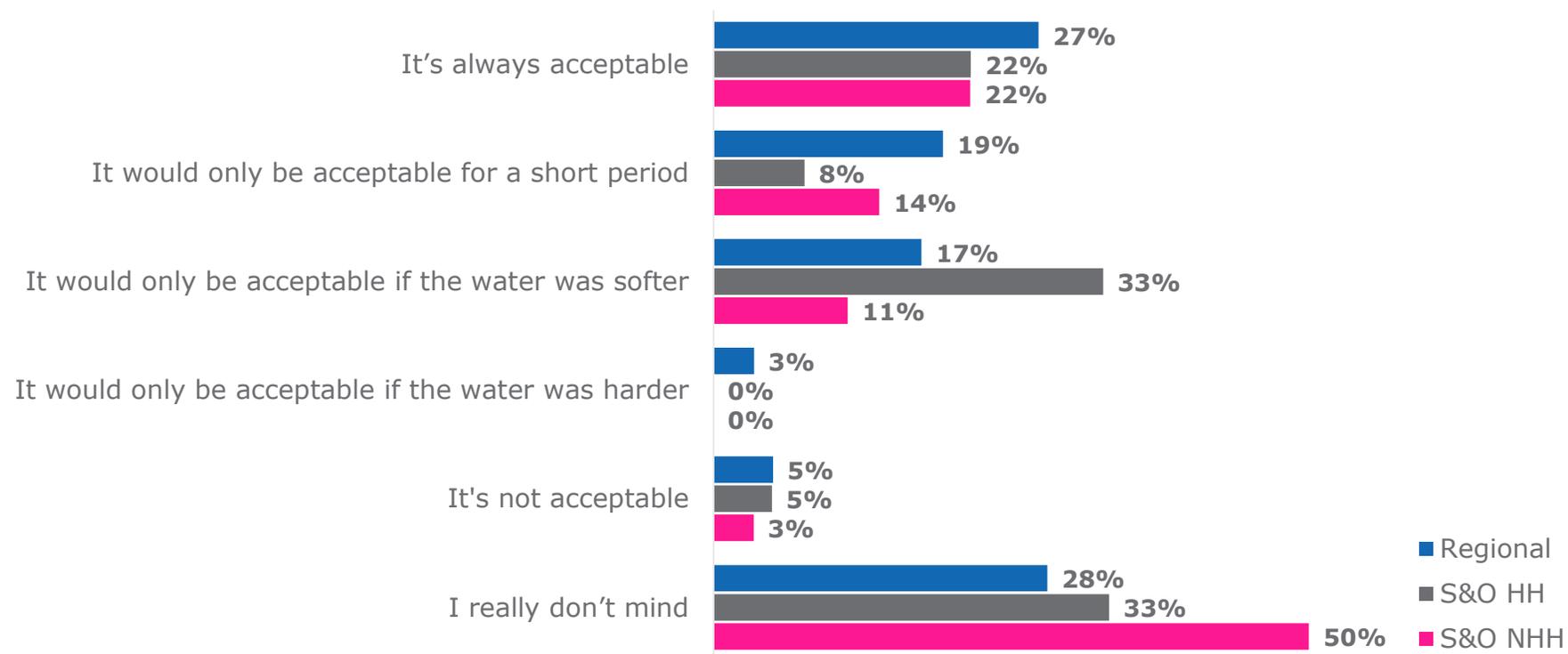
- Use of Calgon or similar is highest amongst residents who consider themselves to have hard water (28% vs. 8%).
- Residents who report limescale in their water (20% vs. 7% without limescale).

# **Switching water sources and other water related issues or concerns**



## Only 1 in 20 think its unacceptable for their water to come from a different source

Regionally, 17% would accept switching of their water source if it meant softer water. This figure drops further to 11% amongst NHHs in Shrewsbury and Oswestry. 50% of NHH's in Shrewsbury and Oswestry have no strong feelings either way.



**Base:** All respondents 923 (S&O HH 93, NHH 199), excluding don't know **Q023**. Please could you tell me how acceptable it would be, if the water supplied to your home by Severn Trent were to come from a different source?

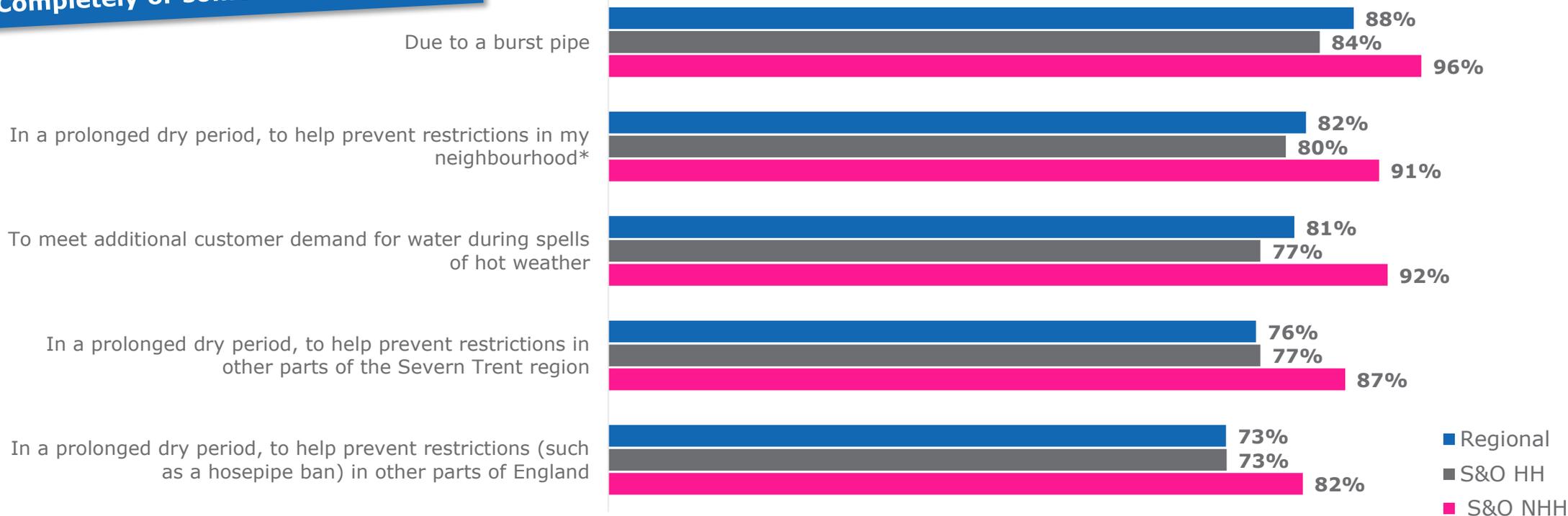


## The majority feel it is acceptable for Severn Trent to switch water supply for all reasons, including in a prolonged dry period and to help prevent restrictions such as a hosepipe ban in other parts of England

Acceptance levels were highest amongst NHHs but fairly consistent between the two household samples.

Notably, the majority of customers don't mind Severn Trent switching sources in a prolonged dry period even if it impacts water quality.

### Completely or somewhat acceptable



**Base:** All respondents 956-964 (S&O 104-105, NHH 198). **Q024:** To what extent would it be acceptable for Severn Trent to change the source of your water supply for the following reasons? **Please note, the changes may result in temporary differences in taste, look, smell, softness, and hardness etc. but it would always be absolutely safe to drink and use.**



## Only a small proportion of regional customers raise other concerns

Of those that did, the most common themes relate to chemicals/ limescale (27 mentions).

### Concerns raised

### Chemicals / Limescale

27  
mentions

"I'm concerned about the amount of chlorine in the water."  
**Male, 35-44, Nottinghamshire, Lives in a hard water area**

"I am a regular tap water drinker and enjoy the taste of ours. We do however get a lot of limescale. That would be my only bug bear."

**Female, 25-34, Nottinghamshire, Lives in a hard water area**

"I have doubts that the water company's purification processes are adequate enough to remove traces of heavy metals, chemicals, plastics, drugs and chemicals that find their way into our water supply."

**Male, 65+, Leicestershire, Lives in a hard water area**

"[The water] it is very hard and the taste and smell of chlorine is horrendous."

**Female, 55-64, West Midlands, Lives in a hard water area**





## Only a small proportion of regional customers raise other concerns

Other key concerns included cleanliness/safety (23 mentions) and the colour of the water (21 mentions).

### Concerns raised

21  
mentions

#### Colour of the water

"When the appearance changes to a brownish colour we do not use it for drinks or cooking."

**Male, 65+, West Midlands, Lives in a soft water area**

"Sometimes our water does run brown, as does the rest of our village."

**Female, 25-34, Derbyshire, Lives in a hard water area**

"It gets very cloudy sometimes and looks white when it is running out [of] the tap."

**Female, 45-54, Nottinghamshire, Lives in a hard water area**

#### Water is clean/safe

23  
mentions

"I believe the water unfiltered is not drinkable. I also treat with UV light."

**Male, 65+, Nottinghamshire, Lives in a hard water area**

"I'm always a bit concerned about what germs or grime is in it."

**Male, 65+, Leicestershire, Lives in a hard water area**

"I just think it is not entirely safe without boiling."

**Male, 55-64, Leicestershire, Lives in a hard water area**



# **How does water quality impact KPIs?**



## Water quality and limescale both impact on overall satisfaction with Severn Trent: Regional HH

Overall satisfaction score: 75%

### Residents are significantly more likely to be satisfied with Severn Trent if they:

Are satisfied with appearance of their water (81%)

Are satisfied with taste of their water (82%)

Are satisfied with the smell of their water (81%)

Are satisfied with the latherability of their (82%)

Have no limescale in their water (84%)

### Residents are significantly less likely to be satisfied with Severn Trent if they:

Are dissatisfied with the appearance of their water (43%)

Are dissatisfied with the taste of their water (44%)

Are dissatisfied with the smell of their water (32%)

Are dissatisfied with the latherability of their water (57%)

Have limescale in their water (73%)



## Regional households are satisfied as they haven't experienced any problems or when issues do occur they are resolved quickly

No complaints or problems

27%

Received good customer service

14%

"I've never really had a problem, as they were quick to come out to resolve a problem with a waterline going to another property that went under our driveway."

**Female, 45-54, Leicestershire, Lives in a hard water area**

"Customer service is good, especially when something goes wrong."

**Female, 25-34, Nottinghamshire, Lives in a hard water area**

"Never had any problems and always advise on any disruption that may occur."

**Female, 65+, Gloucestershire, Lives in a hard water area**

"Never have any problems, but if I do have a query then they always solve it pretty quickly."

**Male, 65+, West Midlands, Lives in a hard water area**

"Great empathetic customer service."

**Female, 45-54, Shropshire, Lives in a hard water area**

"They provide a first class service and keep us informed on any work they are doing."

**Female, 55-64, West Midlands, Lives in a hard water area**





## Other reasons for satisfaction relate to value for money or having good water supply/pressure

### Reasonable prices/good VfM

8%

"Severn Trent is very accessible and affordable; they have payment plans to suit everyone. Also, they offer a discount to people on low incomes."

**Female, 16-24, Derbyshire, Lives in a hard water area**

"Water [is] affordable and is paid by direct debit. The amount I pay has so far been accurate (estimated bill was pretty much the same as the accurate/checked bill)."

**Female, 16-24, Worcestershire, Lives in a hard water area**

### Good supply / pressure

7%

"I have never had any problems with my water quality or supply."

**Male, 65+, Shropshire (Bridgnorth), Lives in a hard water area**

"Overall, our supply is uninterrupted, and the water quality and pressure are good."

**Female, 45-54, Leicestershire, Lives in a hard water area**

"Very rarely experience disruption or poor quality with our water supply."

**Female, 55-64, West Midlands, Lives in a hard water area**





## Similar reasons are also given amongst S&O households

**No complaints or problems**

**28%**

"I have no reason not to be extremely satisfied. Billing and communication is straightforward and I have no other issues."

**Female, 35-44, Shrewsbury, Lives in a hard water area**

"I've not had any problems with my water which is good – I've lived here 30 years."

**Female, 55-64, Shrewsbury, Lives in a hard water area**

"Have no complaints about my water supply and they are very prompt if there are any problems."

**Female, 65+, Shrewsbury, Lives in a hard water area**

**Received good customer service**

**15%**

"They are a good company. Good customer service. If you have a problem, it gets sorted."

**Female, 45-54, Shrewsbury, Lives in a hard water area**

"They provide a good service and are very helpful when any problems occur."

**Male, 45-54, Oswestry, Lives in a hard water area**





## Similar reasons are also given amongst S&O households

**Respond well/quickly to problems**

**11%**

"If I have had to ask them about an issue, they have solved it quickly."

**Female, 55-64+, Shrewsbury, Lives in a hard water area**

"I had to contact them a few weeks ago re a bill query, they offered me a WhatsApp call which was excellent. All info to hand, the advisor had the answers straight away and the whole thing took about 5 minutes, brilliant!"

**Female, 55-64+, Shrewsbury, Lives in a hard water area**

"Have no complaints about my water supply and they are very prompt if there are any problems."

**Female, 65+, Shrewsbury, Lives in a hard water area**





## Again, non households are satisfied with Severn Trent as they have never had any issues with them or their water supply

**No complaints or problems**

57%

"We build a new office and factory units all within Severn Trent, we've never had any problems."

**Small business in the construction sector**

**No issues with supply**

11%

"Water comes out the taps.  
That is all that I am concerned about."  
**Micro business in the property sector**

"I have never had any issues in all the years I have dealt with them."

**Small business in the professional, scientific and technical sector**

"I've never had any problems at all, in 8 years."

**Small business in the retail sector**

"We are satisfied, we get water and there are no issues."

**Small business in the manufacturing sector**



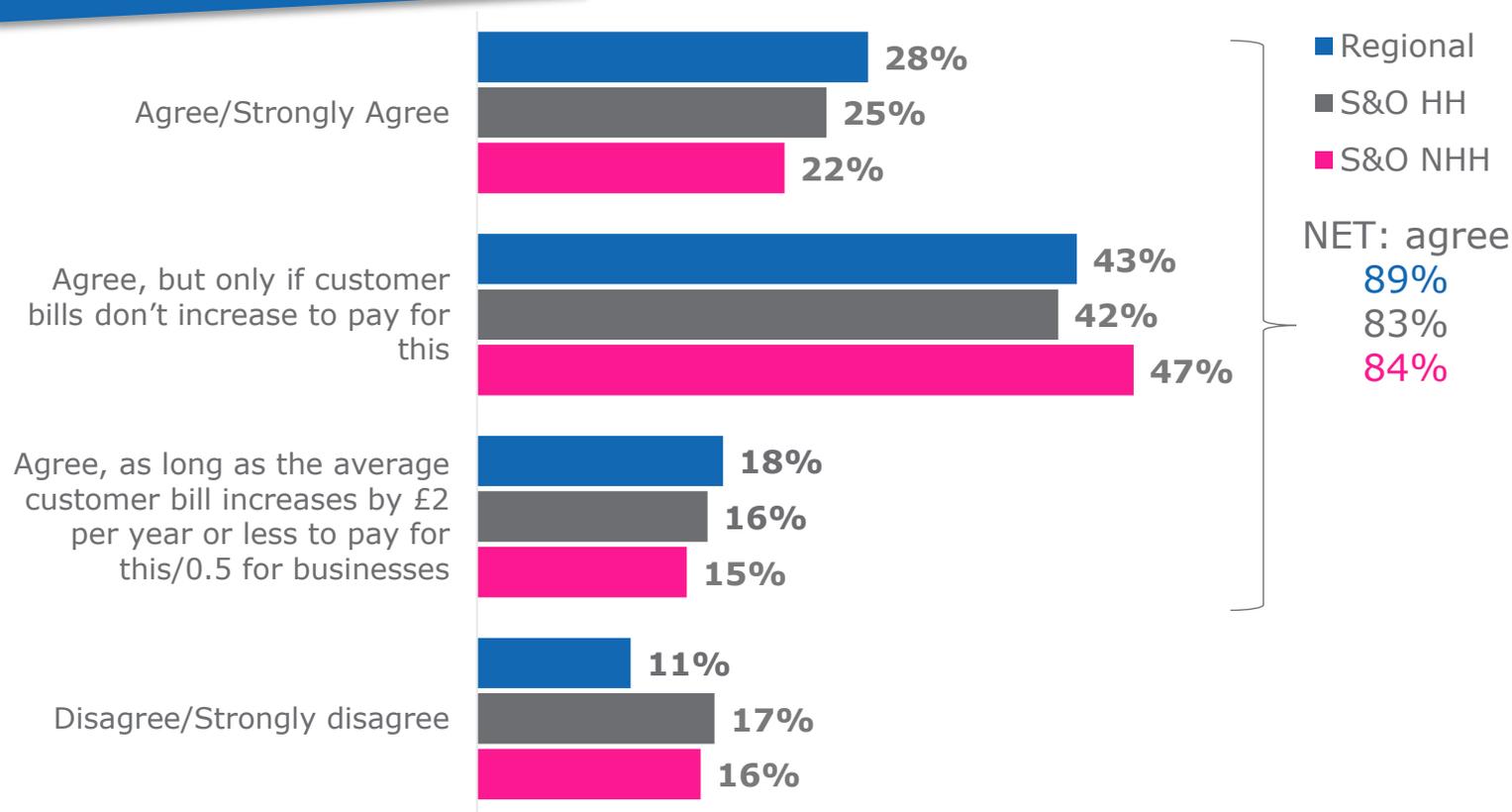
# **Views on what Severn Trent needs to do**



# At least eight in ten agree that Severn Trent should soften tap water, but most don't want to contribute to the cost of this

Around four in ten households think Severn Trent should soften water in hard water areas but don't wish to pay for it.

## Views on softening tap water



## Significant differences (regional HH sample only):

- Regional customers who live in Staffordshire (39%) are more likely than those living in Nottinghamshire (22%) or Gloucestershire (21%) to agree (either strongly agree or agree) that Severn Trent should soften tap water in hard water areas.
- Household customers who live in Gloucestershire (52%) or the West Midlands conurbation (47%) are more likely to agree if their bills did not increase as a result. This compares to 34% living in Staffordshire.
- Household customers who consider themselves to have soft water are more likely to agree but only if customer bills don't increase to pay for this.

# Communication



# Only a small proportion have complained to Severn Trent about their water quality. Of those that have, they are most likely to live in a hard water area

Only 5% of household customers (both regional and those in Shrewsbury and Oswestry) have complained to Severn Trent about their water quality. Only 4% of NHH have complained.

## Experience of complaint



Common themes amongst regional customers included:

**Positive**

- Problem was solved (6 mentions)

**Negative**

- Problem was not solved (12 mentions)
- Discolouration of water (10 mentions)
- Poor handling of complaint/lack of interest/concern from Severn Trent (9 mentions)

Residents in Nottinghamshire or other parts of Shropshire\* (both 9%) are more likely than those living in Warwickshire (2%) to have complained about their water quality.

"The company came out and flushed the water main. this did not solve the problem hence my need for additional equipment to make the water drinkable."  
**Male, 65+, East Midlands, Lives in a hard water area**

"Told to run taps until cleared they didn't seem concerned."  
**Female, 55-64, East Midlands, Lives in a hard water area**



## A key reason for not complaining was because they didn't think it would help or make a difference: Regional

Only a small proportion of regional households have complained. Of those that have, the main reason relates to the fact they did not think it would help or make a difference (15%).

### Felt it would make little/no difference

15%

"I didn't think it was something that could be rectified, I thought it was an area thing and that it couldn't be resolved."

**Female, 45-54, Nottinghamshire, Lives in a hard water area**

"I can see little point in complaining as I doubt anything can be done about the horrible smell and taste."

**Female, 65+, South Yorkshire Lives in a hard water area**

"I accept that the water in my area is hard, yes, limescale is a problem, but there's nothing complaining could do about that, it's just a fact that I live in a hard water area."

**Female, Staffordshire, Lives in a hard water area**

"I don't like the taste of chemicals in the water so I just don't drink it. I don't see how (Severn Trent) can change that."

**Female, 65+, West Midlands, Lives in a soft water area**

"Because it is the same in every household in the area. And every property I have ever lived in."

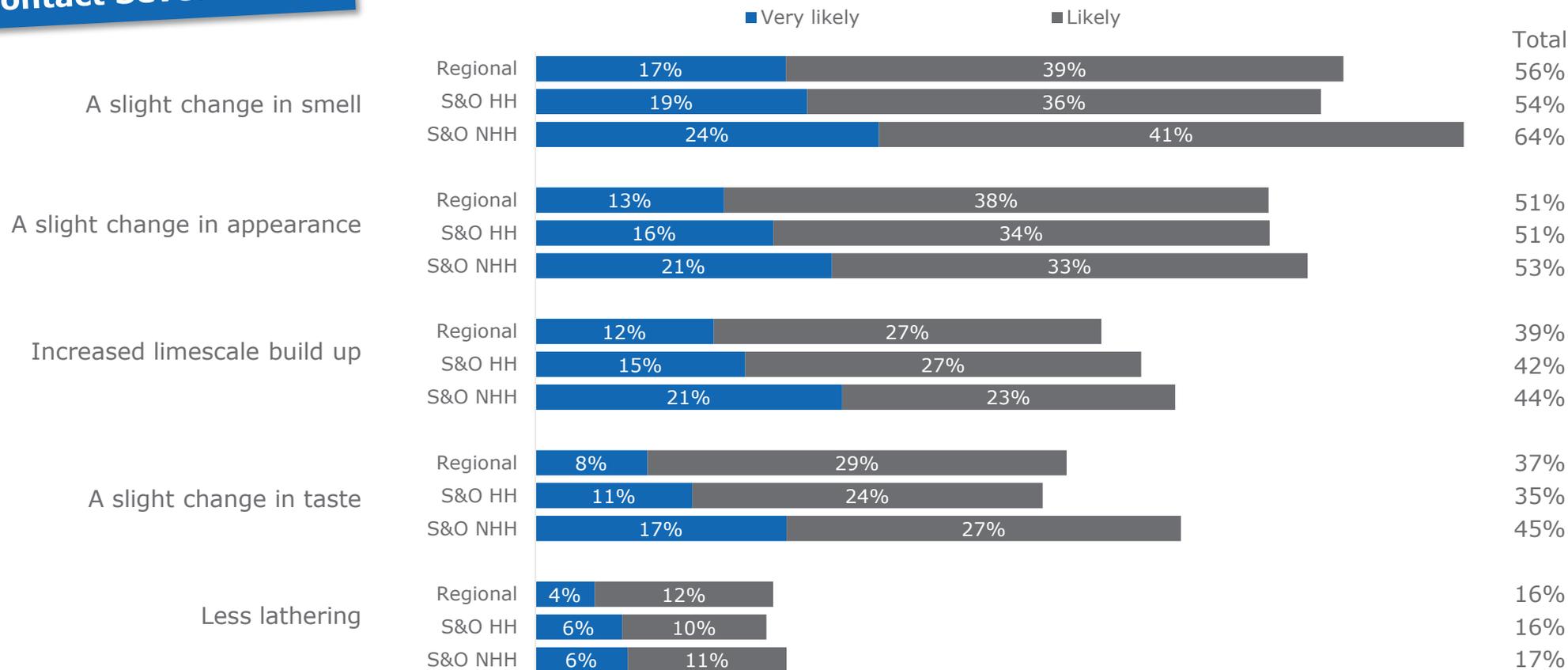
**Female, 35-44, Telford, Lives in a hard water area**





**Around a fifth of household customers (both regional and S&O) say they are very likely to contact Severn Trent if they notice a slight change in smell or appearance.**

**Likely to contact Severn Trent**



**Base:** All respondents 910-928 (S&O HH 100-103, NHH 197-198) **Q025:** How likely would you be to contact Severn Trent if you noticed the following changes to your water supply?



## Around nine out of ten household customers (regional and S&O) indicate that they would like to be kept informed if Severn Trent needs to change the source of their water supplies.

This falls to around seven in ten (69%) amongst non households in the Shrewsbury and Oswestry area.

	Regional	S&O HH	S&O NHH
Yes, every time	46%	54%	31%
Yes, but only if it is going to be harder	16%	14%	9%
Yes, but only if it is likely to last more than a few weeks	25%	23%	29%
<b>NET: Yes</b>	<b>88%</b>	<b>91%</b>	<b>69%</b>
No	12%	9%	31%

### Further analysis (regional HH sample only):

Residents living in Warwickshire (93%) or the West Midlands conurbation (91%) are more likely to want to be kept informed. This compares to 82% in Staffordshire and 83% in Derbyshire.

Residents who have soft water\* are most likely to state they would like to be kept informed (95% vs. 86% with hard water).

Residents under 35 more likely than those 65+ to state they would like to be kept informed (93% vs. 85%).

**Base:** All respondents 899 (S&O 99, NHH 198), excluding don't know **Q026:** If Severn Trent were to change the source of water that supplies your home, would you like to be informed in advance?

\* Data provided by Severn Trent.



## Key reasons for wanting to be kept informed relate to: reassurance, to prepare or to help understand reasons for any changes: Regional

### Kept informed - reassured

21%

"Just for general information so that I'm kept aware. People panic a lot less when they are brought in early on information."

**Male, 25-24, Leicestershire, Lives in a hard water area**

"Forewarned is forearmed. It is much easier to know in advance if something is changing so that you don't have to be concerned or contact Severn Trent unnecessarily."

**Male, 55-64, Warwickshire, Lives in a hard water area**

"So I am well informed and can look out for changes."

**Male, 25-34, Nottinghamshire, Lives in a hard water area**

"I think it is nice to be kept informed of any changes as it makes us feel valued."

**Female, 45-54, West Midlands, Lives in a hard water area**

"For my personal peace of mind."

**Female, 45-54, Warwickshire, Lives in a hard water area**





## Key reasons for wanting to be kept informed relate to: reassurance, prepare or to help understand reasons for any changes: Regional

### Prepare for changes

20%

"It would help to know how long it would be for. This will allow me to take precautions for equipment and pets."

**Male, 65+, Nottinghamshire, Lives in a hard water area**

"So that I know to potentially buy limescale products."

**Female, 25-34+, Derbyshire, Lives in a hard water area**

"To be prepared and understand the reason for any change in water quality."

**Male, 65+, Derbyshire, Lives in a hard water area**

### Understand reasons for change

21%

"If I'm notified by them, I then know the reason why my water has changed slightly. They will get less customers complaining or enquiring about the water change if they warn customers prior to the change."

**Female, 16-24, Derbyshire, Lives in a hard water area**

"So, I won't be surprised and blame other things e.g., washing powder/ soap/shower gel."

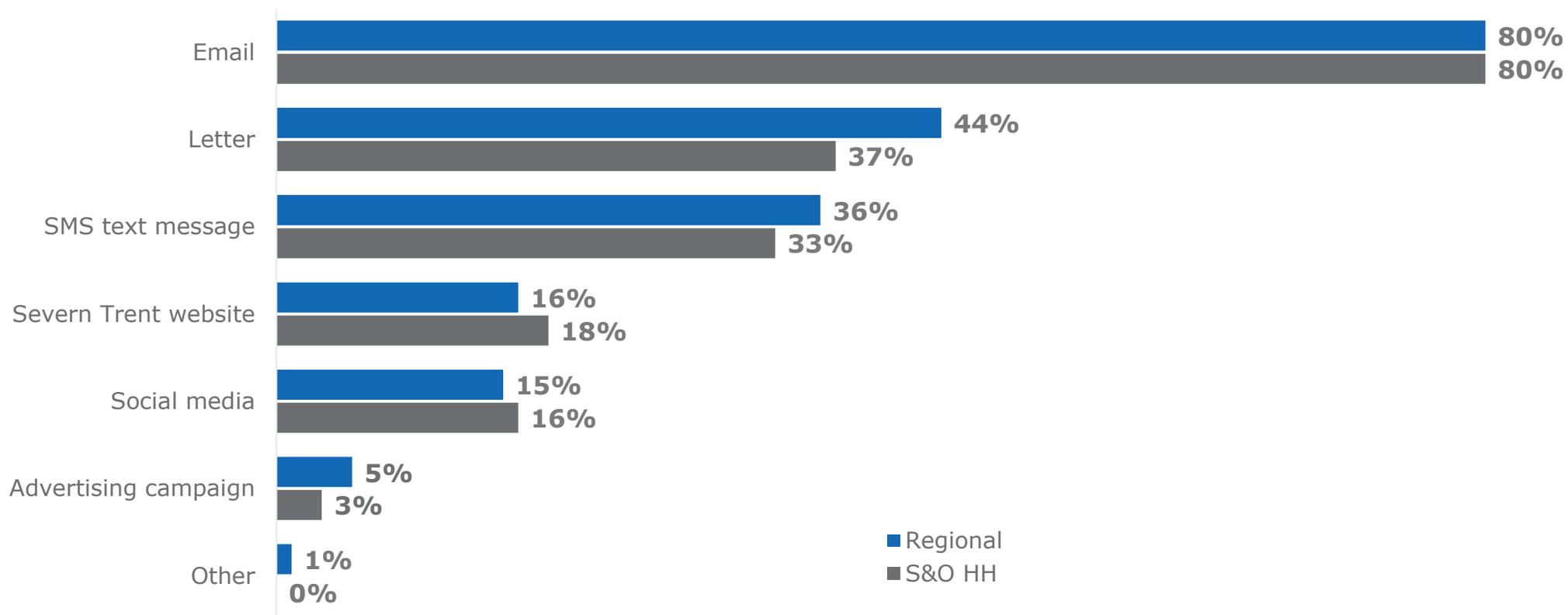
**Female, 35-44, West Midlands, Lives in a soft water area**





## Eight out of ten households (regional and S&O) would prefer to be kept informed about changes to their tap water by email.

This is followed by letter and SMS text messages.



**Base:** All household respondents who would like to be kept informed 773, excluding don't know (S&O HH 87) Q028: Which of the following communication methods, would you like Severn Trent to use to keep you informed about changes to your tap water?

# Conclusions

# Conclusions

1

The majority of households consider their tap water to be safe and claim to drink it. This was further reflected in the relatively high proportion of respondents indicating they were satisfied with the taste, appearance and smell of their tap water (either supplied to their home or business). Although, it should be noted that satisfaction with taste is notably lower in the Shrewsbury and Oswestry area. Taste is also identified as a key driver of satisfaction and therefore should be an area of focus for Severn Trent.

2

A high proportion of households make changes to their water before drinking it cold or using it to make hot drinks. Nearly eight in ten regional customers add squash or flavouring or empty their kettle to avoid re-boiling their water. These results are very similar in Shrewsbury and Oswestry.

Interestingly, despite a higher proportion of Shrewsbury and Oswestry households stating they are dissatisfied with the taste of their tap water, a lower proportion drink (still) bottled water at home (29% compared to 37% regionally).

3

Some respondents have highlighted issues with limescale. Almost a third of NHH's report having a great deal of limescale. This compares to 21% of households in Shrewsbury and Oswestry and 16% of households regionally. Despite this, usage of products or mechanisms to filter or soften water is relatively low across the board.

4

When looking at variations with water quality, around a fifth of regional customers indicate that their water quality varies. This is particularly the case for appearance and taste (both 21%). The results are fairly similar in Shrewsbury and Oswestry. Over a quarter experience some variations in taste (28%) and appearance (26%). A fifth of non households in the same area experience some variation in taste.

5

When asked for views on Severn Trent's responsibility to soften water in hard water areas. Around four in ten household customers (both samples) and one half of non-household customers agree with this in principle, as long as their bills do not increase as a result. The majority of households (regional and Shrewsbury and Oswestry) are also reluctant to pay for products to help soften their tap water or counter its effects.

# Conclusions

6

When asking about switching water sources, acceptability levels are generally high, particularly if it leads to softer water in Shrewsbury and Oswestry.

When looking at various scenarios, acceptability levels are relatively high in these instances too. The majority (both household and NHHs) feel it is acceptable to switch water supplies due to burst pipes and/or to help prevent restrictions locally and nationally (even if it impacts water quality).

7

The final section of the survey focused on communication.

Around nine in ten households indicate that they would like to be kept informed if Severn Trent needed to change the source of their water supplies. This falls to around seven in ten amongst non households in Shrewsbury and Oswestry.

The key reasons for wanting to be kept informed relate to reassurance, preparation or helping them understand the reasons for any changes.

Both household customers (regional and S&O) and NHH customers indicate that they are most likely to contact Severn Trent if they experience a slight change in smell or appearance.

The preferred communication methods (regional & S&O) to be informed about any changes to tap water is via email. This is followed by letter and SMS messages.

# Appendix



# Respondent profile: regional

996 online responses via a panel between February and March 2022.

## Area

West Midlands conurbation: 26% (33%)

Nottinghamshire: 17% (14%)

Leicestershire: 14% (11%)

Derbyshire: 12% (9%)

Warwickshire: 9% (10%)

Staffordshire: 7% (8%)

Gloucestershire: 6% (6%)

Worcestershire: 6% (6%)

Shropshire (excluding S&O): 4% (3%)

## Gender

 **Male:** 47% (49%)

 **Female:** 53% (50%)

## Metered/unmetered

 **Metered:** 55%

 **Unmetered:** 45%

## SEG

 **ABC1:** 58%

**C2DE:** 42%

## Age



**Under 35:**  
15% (15%)



**35-54:**  
35% (36%)



**55-64:** 18%  
(17%)



**65+:** 32%  
(32%)

94% (93%) bill payers

6% (7%) non bill payers

85% (80%) hard water\*

15% (20%) soft water\*

**Has a long-term illness/disability:** 19% (20%)

**Without a long-term illness/disability:** 81% (80%)

\*Based on data provided by Severn Trent. Unweighted figures. Weighted figures are shown in brackets.



# Respondent profile: Shrewsbury & Oswestry HH

**108 online responses** between February and March 2022.

## Area

**Shrewsbury:** 94% (91%)

**Oswestry:** 6% (9%)

## Gender

 **Male:** 40% (48%)

 **Female:** 60% (52%)

## Metered/unmetered

 **Metered:** 61% (57%)

 **Unmetered:** 39% (43%)

## SEG

 **ABC1:** 73% (52%)  
**C2DE:** 27% (48%)

## Age



**Under 35:** 10% (17%)



**35-54:** 37% (34%)



**55-64:** 23% (19%)



**65+:** 29% (31%)

**97% (96%) bill payers**

**3% (4%) non bill payers**

**100% (100%) hard water\***

**0% (0%) soft water\***

**Has a long-term illness/disability:** 11% (10%)

**Without a long-term illness/disability:** 89% (90%)

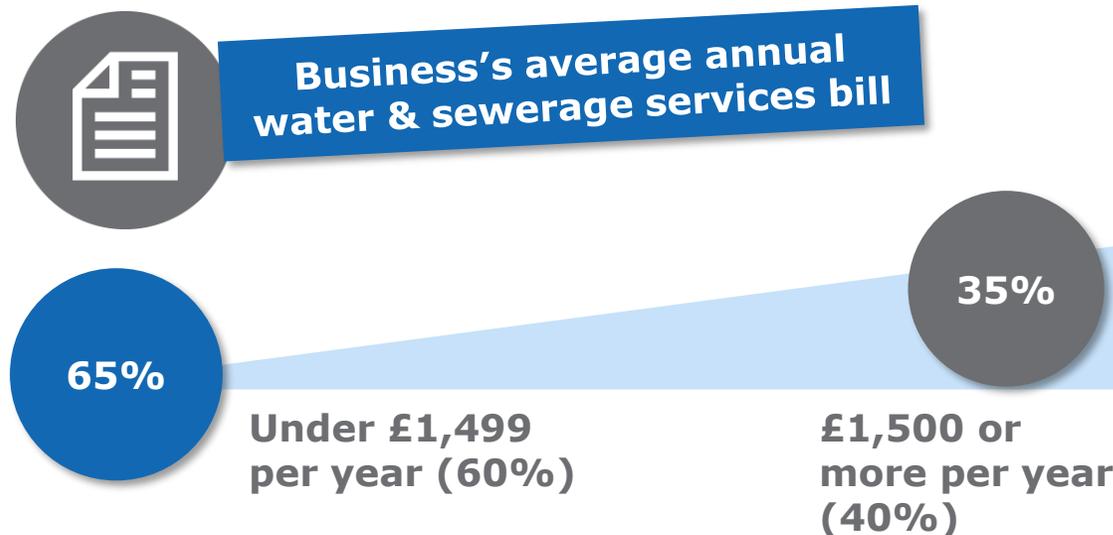
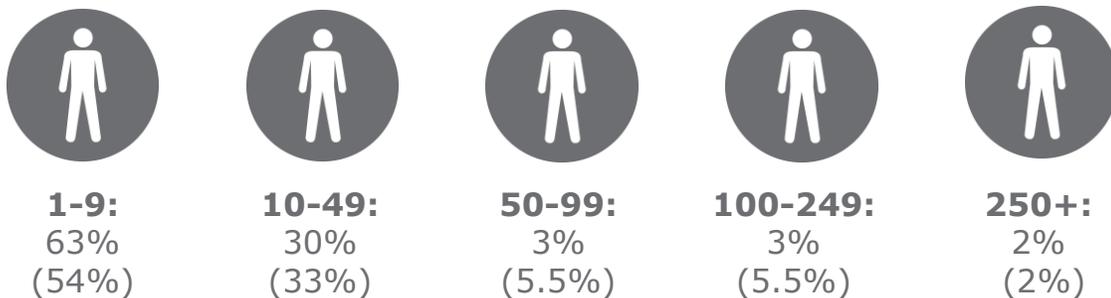
\*Based on data provided by Severn Trent. Weighted figures are shown in brackets.



# Respondent profile: non-households

199 telephone interviews conducted between February and March 2022.

## Business size (no. of employees)



## Area

**Shrewsbury:** 73% (74%)  
**Oswestry:** 27% (26%)

## Sector

**Private:** 81% (77%)  
**Public\*:** 19% (23%)

\*Non household based in Shrewsbury and Oswestry only. Private sector is defined as Public Administration and Defence; Compulsory Social Security, Education, Human Health and Social Work Activities. Weighted figures are shown in brackets.

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