



# State of the Nation UK Water Companies' CX

A Twitter study summary report using  
Deep Learning, NLP and Linguistics

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# Why read this report?

How can water companies really listen to and understand their customers when there is so much noise on social media? And how can they identify the problems that affect most customers... and those that affect some customers most?

2020 has so far delivered a myriad of external factors, which dealt blow after blow to water companies working tirelessly to maintain critical services.

Kicking off with Storm Dennis, followed by a global pandemic and a country-wide lockdown - there were several subsequent impacts on providers:

- Loo roll shortages led people to use blockage inducing kitchen roll and wet-wipes
- Lockdown saw the whole country at home dealing with hygiene anxieties and a greater need than ever for a constant supply of quality water
- Job losses saw financial pressures on people unable to pay bills
- The furlough initiative triggered a spate of car washing, patio power-washing and a surge in Monty Dons watering their newly planted borders and hanging baskets
- Then the kicker - the driest May on record. Cue hosepipes, paddling pools and a 1000% increase in hot tub sales.

**Using our game-changing text analysis software, we've analysed over 50,000 tweets mentioning 15 of the most talked-about water companies on Twitter, to uncover:**

- **What issues caused the most damage to customer sentiment**
- **What services do customers care most about**
- **What quick wins can improve customer experience**

Grab a cuppa, and take a look at how each brand performed, where they delivered and what unique issues bothered their customers more than others.

## Report contents

What we did

Sentiment score league table

Themes performance cross table

A-Z brand overviews

# What we did

Between **February to July 2020**, we listened to all of the the tweets which mentioned the fifteen most talked about UK water companies.

We grouped the conversations into key areas, to see how each company was performing on water efficiency, supply, quality, bills, leaks, work disruption and customer service.

Over 50K tweets were fed through our game-changing **text analysis and insight platform** where our combination of cutting edge artificial intelligence (AI) and old-school linguistics allows computers to read - and genuinely understand - what people actually mean, not just count the words they use, like traditional social listening tools.

# What we found



## Northumbrian Water

Had the happiest customers



## Thames Water

Had the most interactions (by a long way)



## Thames Water

Had the most unhappy customers



When external factors impact water supply, **updated website information and/or accurate text message updates** work well to manage customer expectations, offering reassurance and improving the customer's experience.



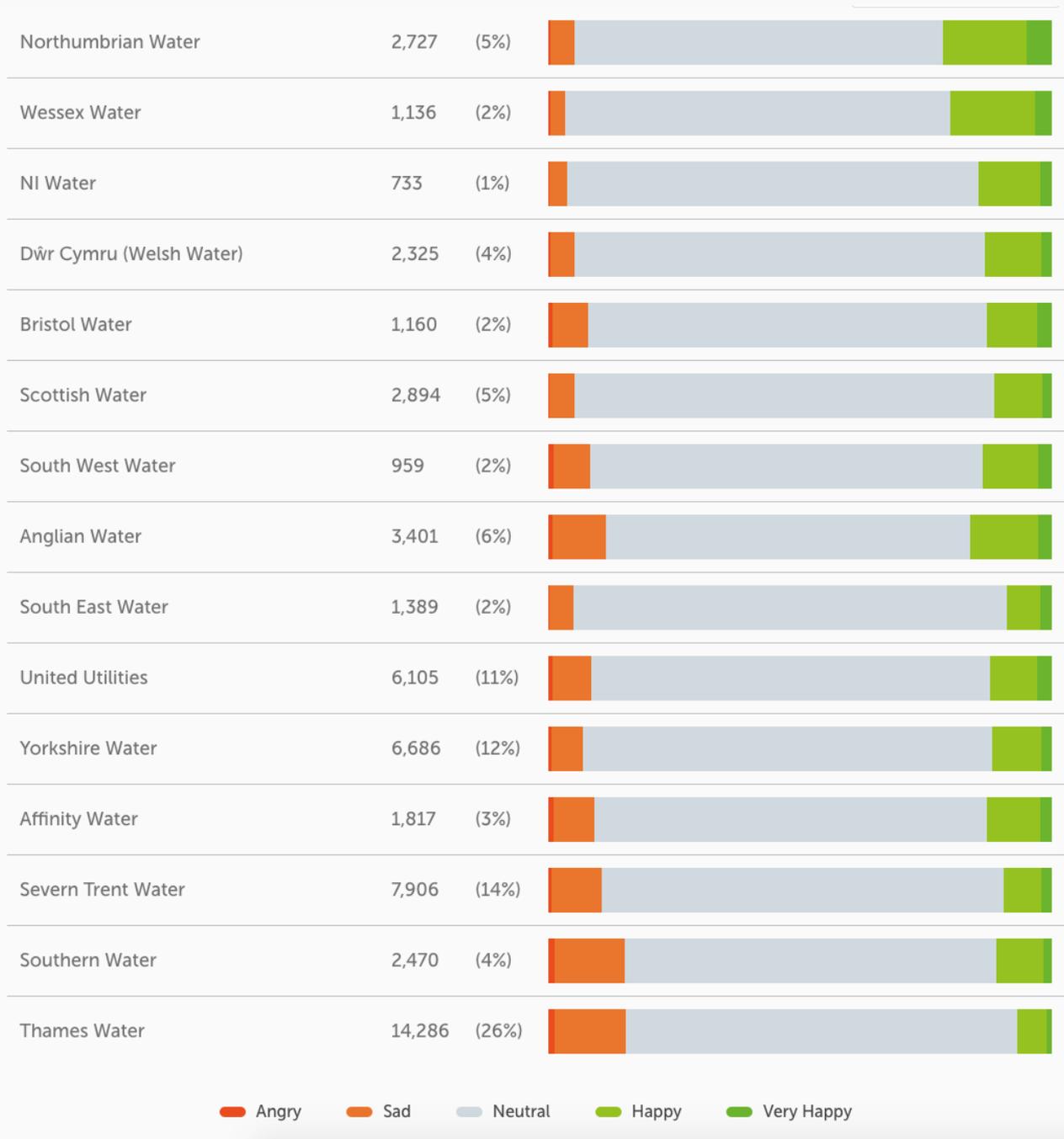
Successful water efficiency campaigns, especially when linked with charity or community initiatives can go a long way in improving sentiment, as **customers are becoming increasingly environmentally conscious.**



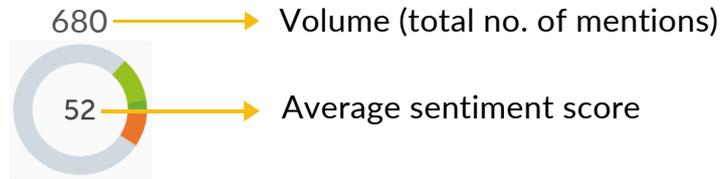
**Speedy replies go a long way** in positively contributing to the customer experience, with customers viewing Twitter as the ultimate problem solver.

# League table

League table of the 15 most mentioned UK water companies based on a weighted average Wordnerds' generated sentiment score out of 100.



# Themes

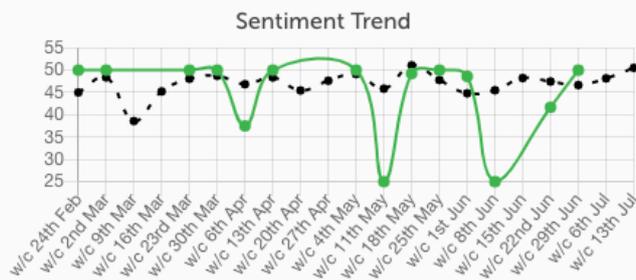


Cross table of brand performance showing volume and average sentiment score for each key area.

	Bills	Customer Service	Leaks	Water Pressure	Water Quality	Work disruption
Affinity Water	120 46	76 57	175 49	618 51	35 45	57 44
love every drop anglianwater	112 47	160 61	239 48	624 51	67 46	107 43
BRISTOL WATER	43 49	71 62	100 52	530 52	24 51	11 43
Dŵr Cymru Welsh Water	103 48	151 60	135 50	424 54	56 50	67 48
NORTHUMBRIAN WATER living water	62 51	170 65	116 52	451 53	80 48	29 50
SEVERN TRENT	447 47	504 57	671 47	2,554 49	208 45	320 45
south east water	81 49	63 60	195 50	359 52	21 50	54 47
Southern Water	224 45	139 55	185 47	715 51	88 44	81 44
South West Water	108 46	62 59	55 50	237 53	44 45	18 46
Thames Water	2,805 44	790 51	3,155 47	4,348 47	206 46	594 44
United Utilities	229 47	332 59	301 47	1,044 50	191 47	156 46
Wessex Water YTL GROUP	60 51	87 62	93 49	261 58	27 50	31 50
YorkshireWater	343 48	317 58	377 49	1,583 50	199 47	166 47
Scottish Water Always serving Scotland	23 47	97 61	238 49	979 52	251 49	47 46
northern ireland water Delivering what matters	15 50	39 67	34 54	147 54	20 53	19 50

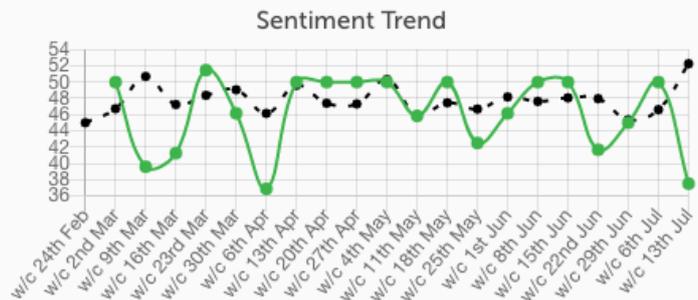
**What was unique about the brand?**  
 chalk drought soft drink  
 ofwat saving plants  
 win abstraction hot

Affinity Water came 12th out of the 15 brands we benchmarked. Most of the issues raised by customers concerned the taste of the water and work disruption. Despite this, they were acclaimed for providing excellent customer service and spreading the message about saving water in times of reduced supply.



Water quality was a standout issue for Affinity Water's customers with claims of **sulphur like smells**. This saw them close to the bottom of the chart in terms of water quality, similar to other South East companies.

**Issues around bills** saw the sentiment score dip well below market average on numerous occasions. These conversations were centred around bill increases, **unanswered email queries**, and **bill complications** with house moves and rental properties.



### Water efficiency

Affinity Water customers see water efficacy as very important, making up 15% of all conversations monitored.



### Ofwat

Affinity Water customers were most likely to **reach out to Ofwat** than any of the other brands in the report.

### One to watch

**Repetitive, confusing or inaccurate text messages** are leading customers to complain via Twitter, even asking to opt out.

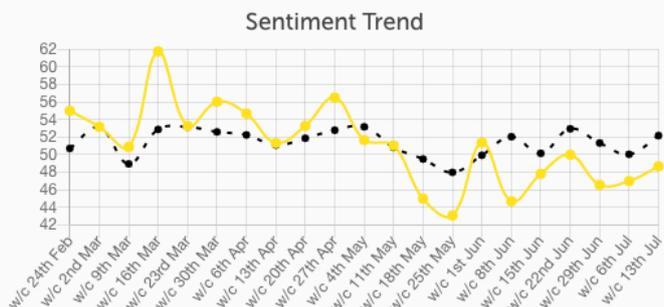


**What was unique about the brand?**  
 river recycling emissions irrigate  
 solar region resources  
 funding wetland waterwise

Nailing community support and a phenomenal spread of 'good news' PR coverage ensured Anglian Water's overall sentiment score settled mid-table. However a range of issues around poor water pressure, leaks and work disruption saw customers take to Twitter to vent their frustrations, impacting the overall score.

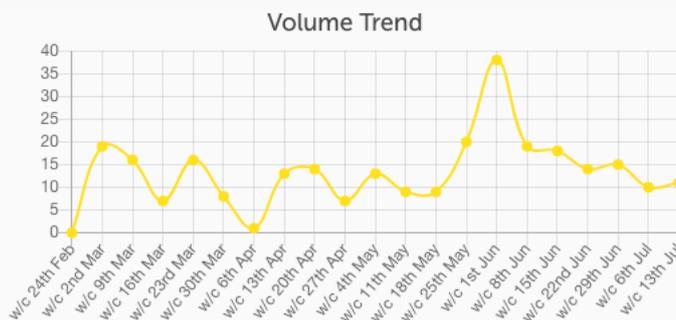
**Water pressure**

Issues around water pressure accounted for 17% of all tweets sent to Anglian Water, and their sentiment score for this category was below the market average.



**Leaks**

Reported issues being ignored, forms on the website not working or times given to fix leaks all contributed to leaks being an area of irritation for customers with a spike in volume early June.



**Community**

Lots of praise for support of a COVID-19 fund, seen as a real step to support the local community and its small organisations.



**Customer service**

Special shout outs to call centre agents and engineers' following standout customer service, with thanks for key workers attending issues during lockdown.



**Quick responses**

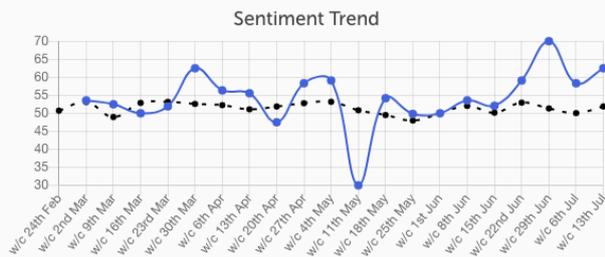
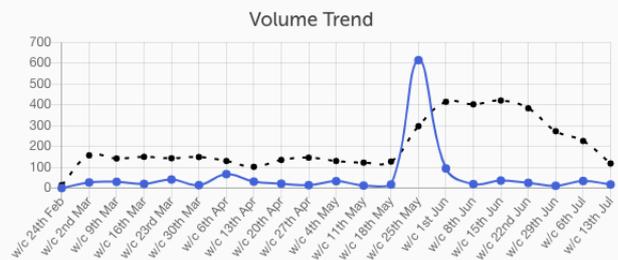
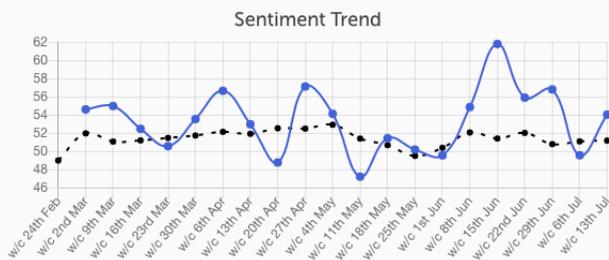
Social media teams' quick responses did wonders to put customers at ease when reporting issues or querying.

**One to watch**

Out of date website information, especially in relation to closed roads, or planned works saw the most angry sentiment, as people took to Twitter to vent their anger at the incorrect or lack of information.

**What was unique about the brand?**  
 residents shielded upstairs vulnerabe  
 back priority colour  
 distributing damaged trickle

Finishing fifth in the league table, Bristol Water were one of the top performing brands across customer service, bills, leaks and topped the charts for water quality. It was issues around water pressure on the May bank holiday weekend and work disruption which impacted their final score.



A higher percentage of Bristol Water customers complained about **issues with water supply upstairs** when water pressure problems were reported. However other than a dip w/c 11th May, Bristol Water managed to keep their sentiment score above the market average for water pressure throughout the reporting period.



### Quick response

Excellent customer service was celebrated on Twitter during lockdown, in which they ranked fourth highest. Customers seemed particularly grateful for Bristol Water's quick response during such challenging times.

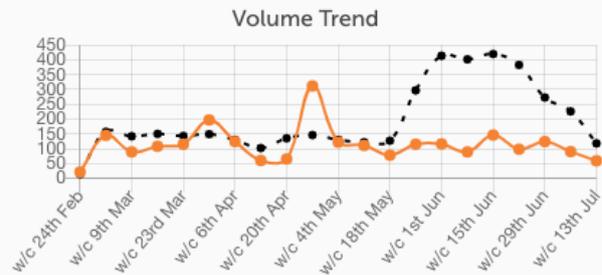
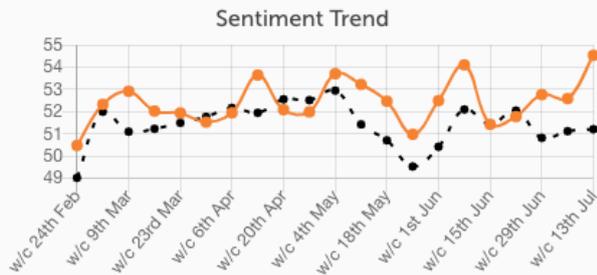


### Vulnerable

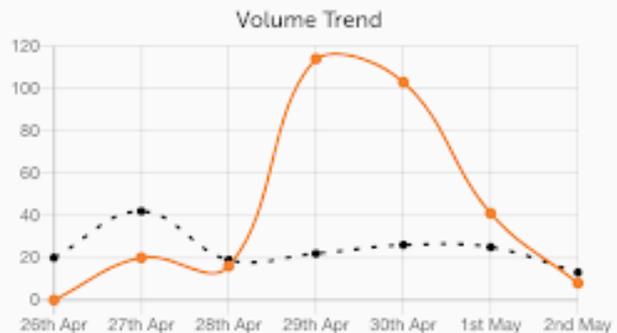
Bristol Water customers were most likely to raise concerns for the vulnerable and those who were shielding compared to other brands, especially when issues around water pressure spiked at the end of May.

**What was unique about the brand?**  
 silage profit plumbers essential  
 breeding timing model  
 watersafe pesticide vandalism

Dŵr Cymru placed 4th overall in the league table, which is testament to high sentiment scores in the categories we analysed. They **topped the charts for water pressure** as other companies scrambled with severe supply issues, they managed to keep their sentiment score mainly above the market average for the duration of the reporting period.



Customers were **highly critical of the environmental works** being undertaken during nesting season. Complaints peaked on 29th April, compounded by further large scale mowing of grassland, putting further risk to insect habitats, which saw the sentiment score drop below market averages for that time. Issues around pesticides were also raised, expressed more by Dŵr Cymru customers than anywhere else in the country.



### Response teams

Significant thanks was expressed by customers, showing their appreciation for response teams working during lockdown. Customers took the time to show their gratitude for the great work during difficult times.



### Blocked drains

Specific praise was given to Dŵr Cymru for their efforts and speed in clearing reported blocked drains, with comments that staff were courteous, helpful and generally superb.



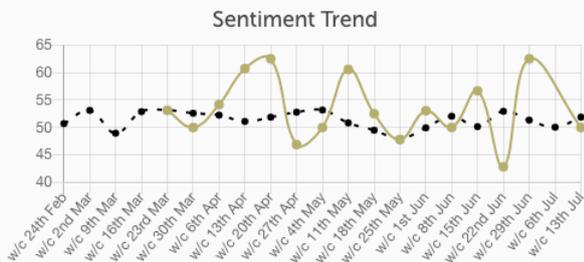
**What was unique about the brand?**

ban plumbers weather business  
 public tips coastal  
 hosepipe gate beach

The volume of tweets to and about Northern Ireland Water were the lowest for all the brands mentioned in our report.

As residents don't pay for water in a similar way to the other brands analysed, this has likely impacted customer behaviour. But, there was still some areas where customers shared what they liked and didn't like about the service.

**Water pressure**



There was support from local representatives and press for Northern Ireland Water's water saving measures, but the subject was met with frustration by customers, which saw their sentiment score dip below market average on a number of occasions.

A **hosepipe ban** was **hotly discussed**, mixed between those asking for a ban and those questioning the effectiveness of a ban. Scam text messages asking people to reduce water usage around 1st June also added to the conversation, as confusion was raised with the timing of the texts, given the rainy start to June.

water pressure 4	water ... new 3	dry spell 3	time ... day 3
hosepipe ban 3	noticed my water 2	paddling pools 2	water ... months 2

There was also a bit of ill feeling from a number of residents who felt the use of public money on radio advertising was futile, and in response, referenced reported leaks which hadn't been actioned, or issues with infrastructure.



**Water saving**

Local companies and representatives got behind efforts to share water saving tips, which were received with favour.



**Unsung Heros**

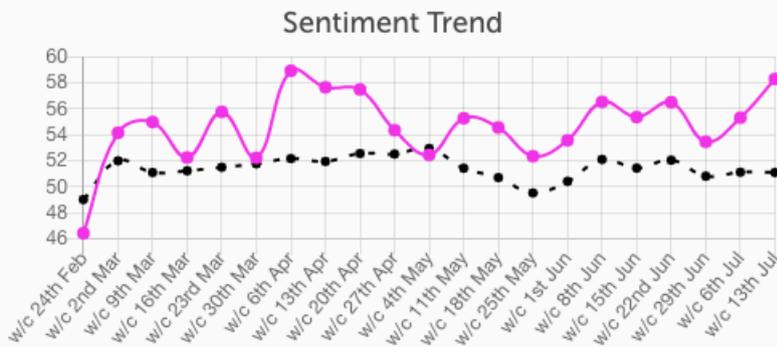
Significant thanks was expressed by customers, showing their appreciation for response teams working during lockdown.

**What was unique about the brand?**

thank    innovation    poo    bin  
 animals    beaches    free  
 wipes    throw    litter

Northumbrian Water topped the league table, with top scores in customer service, bills and work disruption.

Like everywhere else in the country, their sentiment score was impacted by water pressure, but not to the same scale as other companies, with only 3% of total mentions being directed their way. Although this was the area they received the most tweets about, it only accounted for 15% of all mentions for the reporting period.



On average, Northumbrian Water's customers were much happier than the market average, with 22% of all tweets at the company exhibiting positive sentiment.

Around the 29th June, an increase in tweets about water quality, specifically brown water, saw the average sentiment score for water quality dip slightly below the market average for a short time.

- |                    |                       |                       |                    |
|--------------------|-----------------------|-----------------------|--------------------|
| brown water 6      | run the tap 3         | discoloured water 2   | water ... smells 2 |
| quality ... poor 2 | water running dirty 2 | coming out the taps 2 | wet wipes 2        |



**Thanks**

Customers were much more likely to thank Northumbrian Water than other areas, with emphasis on thanks for essential workers.



**Water**

Being asked to run the tap to help clear water issues triggered an angry reaction as people raised concerns about water waste and impact on metered water bills.



**Marine care**

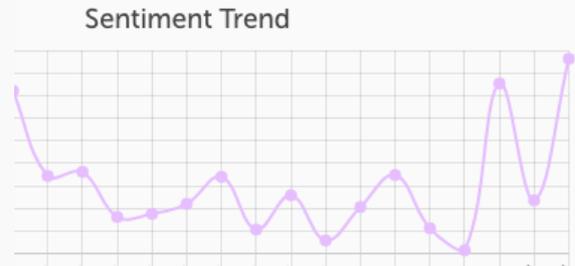
Customers expressed concern about protection for marine animals. More than any other part of the UK.



**What was unique about the brand?**

brown	safe	colour	formula
thanks	issue	supply	
tap	treatment	reuse	

Reports of brown water, concerns around water quality and on-going leaks impacted the overall score for the Scottish Water. Sentiment continued to decline from the beginning of lockdown, but picked up towards the end of June.



Water quality was both a matter of pride and frustration for customers. While there is a sense of pride for the quality of Scotland's water, there was an on-going issue with brown water.



### Brown water

3% of all tweets to Scottish Water reported brown coloured water coming from their taps.



### Young families

Those with children felt particularly anxious about water pressure and quality issues for washing hands and drinking water.

The length of time that burst pipes were reportedly left running was a significant bone of contention for some customers.



JR  
@weegie\_panda

Scottish Water

Fed up paying annual increases to @scottish\_water for poor service. You leave **burst pipes** running for weeks despite them being reported; costing more in long run. Approach to...



### Engineers

Received extra praise for response team's efforts, speed and customer service during lockdown.



### Twitter team

The social media team's quick responses were appreciated and helped boost the overall sentiment score.

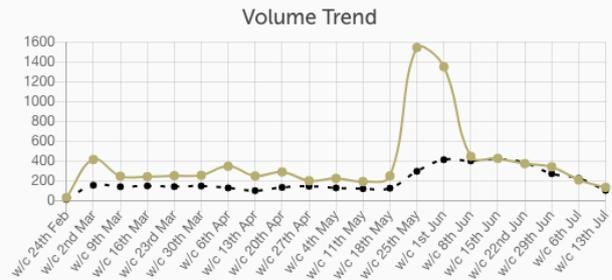
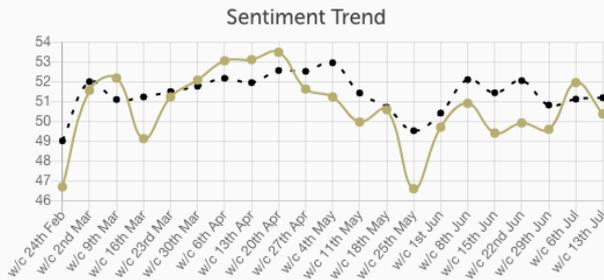


### Scottish brew

The launch of eteaket's Scottish Water tea blend played perfectly into Scotland's sense of pride and the campaign was a big hit.

**What was unique about the brand?**  
 rumble wash message generous  
 vibration money scam  
 charities customers call

Severn Trent were the 2nd most mentioned brand, finishing bottom 3rd of the league table. They received a 515% increase in volume of tweets on the May bank holiday weekend as water pressure problems spiked.



Customers tweeted concerns about low/no water and unable to wash their hands or flush the toilet.

water pressure <b>108</b>	wash hands <b>24</b>	coming ... taps <b>16</b>	flush the toilet <b>15</b>
night in a row <b>10</b>	area says low <b>9</b>	high ... demand <b>9</b>	supply issue <b>8</b>



**Kept on hold**

Severn Trent received the most mentions about being kept on hold, 216% higher than the market average.



**Scam calls**

41% of all tweets mentioning calls were about customers complaining about unwanted automated calls during the early hours of the morning, which most did not identify as scam calls.



**No call back**

7% complained that they didn't get a call back when expected, 2% complained of calls getting cut off and 5% said call centre lines were either busy or they couldn't get through at all.



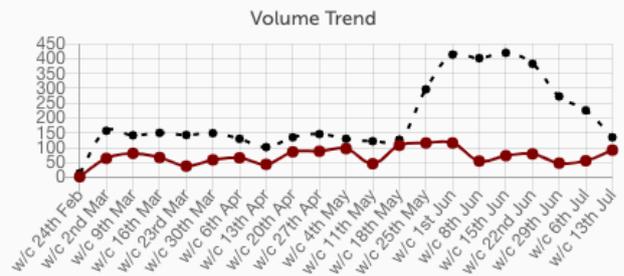
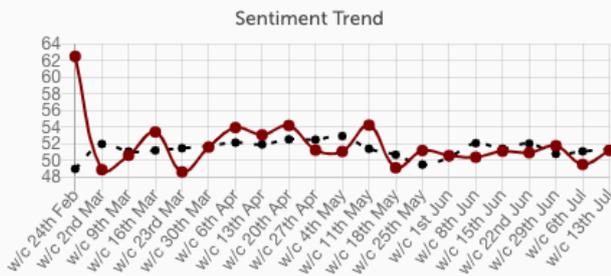
Severn Trent's work with charity in response to COVID-19 has been praised. This was mentioned with much more emphasis compared to other brands.



**What was unique about the brand?**

closed tips lawns generous  
works burst fast  
repairs mains leaking

South East Water's sentiment remained consistent throughout the reporting period, and on par with the market average, which sees them sit mid table. As one of the smaller companies that we reported on, their volume was lower than others, and remained unaffected by water pressure issues that occurred nationally from May onward.



### Praise

South East Water were more likely to receive praise for speed and politeness when compared to other brands in the report.



### Watering lawns

When discussing water efficiency, customers were most likely to talk about not watering lawns.



### Saving water

Support and press coverage around water saving tips and free water-saving products helped boost the average sentiment score.

### Burst pipe

There was more discussion about public works in the South East region than anywhere else. This was mainly as a result of a burst pipe in Maidstone.

The burst pipe and resulting road closures impacted sentiment, as local businesses reported impacts of the closed road, some threatening legal action.



**Mark Driver** @SussexWineProd · Jul 13

What's really annoying is that they agreed to pay us compensation, we had several meetings on-site then they reneged in the agreement.. we lost £30k of revenue because they closed the road, our main access to the A27!



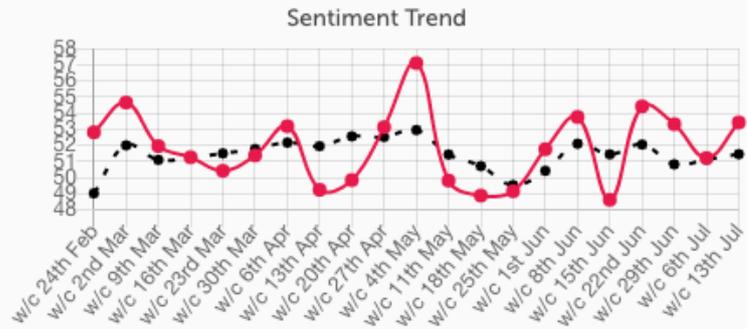
**Rathfinny Estate** @RathfinnyEstate · Jul 13

Cannot believe that SouthEast Water are refusing our claim for compensation for loss of business after closing the road through #Alfriston earlier this year. We lost all passing trade and it materially affected our business ... see you in court @sewateruk

**What was unique about the brand?**

research   harbour   bill   website  
 beach   seaweed   timed (out)  
 pay   nappies   meter

At the start of the pandemic there was a lot of support for South West Water around good response times and the coming together of the South West. Issues around water pressure and sewage impacted the overall sentiment score.



### Billing

Billing was a particular issue for South West customers, specifically around the **website timing out when making payments online**. We found comments three months apart reporting this same issue.

Conversations around bills were particularly prevalent in April, with increased financial pressures due to unemployment and furloughs.

Whilst South West Water's overall sentiment sits two points over the market average across the reporting period, sentiment around billing slipped under the market average, suggesting South West Water customers are experiencing more issues than most in this area.

17% of tweets around billing raised **problems with the app and website**, when attempting to make payment, during April.



### Water meters

South West Water customers were most likely to reach out to query smart meters around locating them and submitting readings.

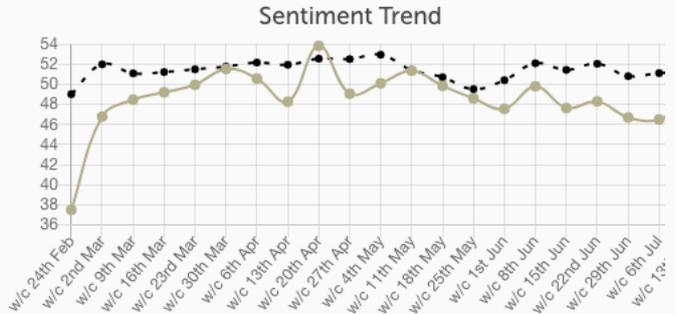


### Harbour leak

A Falmouth sewage leak brought substantial press attention, and customer anguish, causing a sentiment dip by six points to 46/100 - the lowest point of the reporting period and impacted the final score.

**What was unique about the brand?**  
 vulnerable bottled bill still  
 road customers sewage  
 register repair sewer

Southern Water were second bottom in the league table. Their sentiment trend remained consistent throughout the reporting period, sitting just under the market average.



### Billing

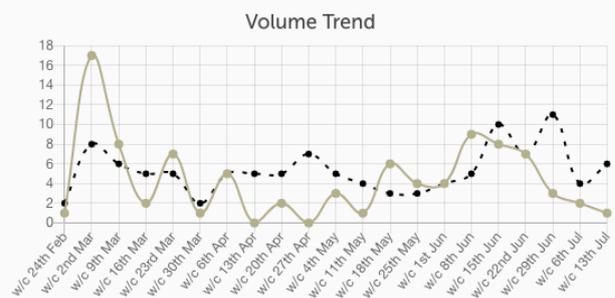
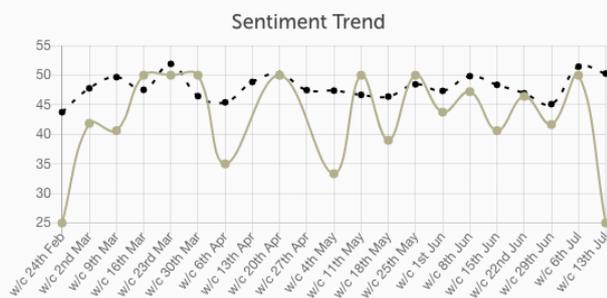
There was strong negative sentiment from customers having issues with bill payments. Of the total number of tweets relating to billing, almost 25% were from unhappy customers.

Most frequent complaints about bills and billing included:

- Customers being asked to pay for a bill they had already paid
- Difficulty accessing the website to be able to pay bills (especially around 11th July)

### Sewage

Southern Water received a greater percentage of mentions in relation to sewage, which saw their sentiment around the subject sit below the market average for the duration of the reporting period, with volume sitting above market average.



### Bottled water

The outage around 27th April saw a spike in volume, met with thanks given from those who received bottled water. However, this positivity was over shadowed by a greater number of those tweeting criticism around the responsiveness to vulnerable customers getting access to bottled water.

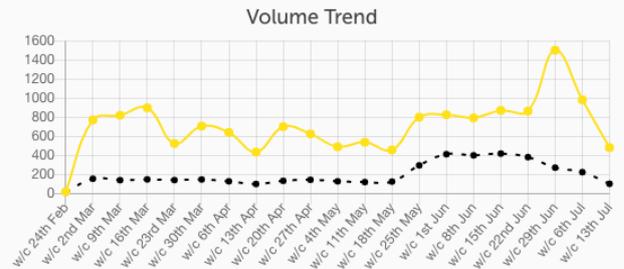
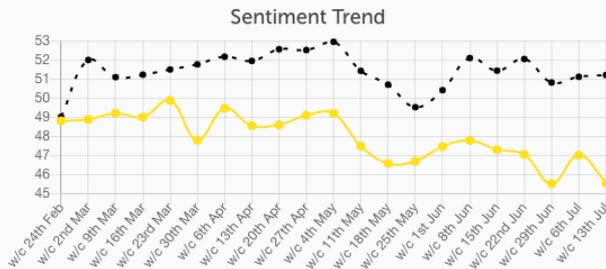
Southern Water customers were also recorded as more likely to request bottled water than anywhere else in the country.



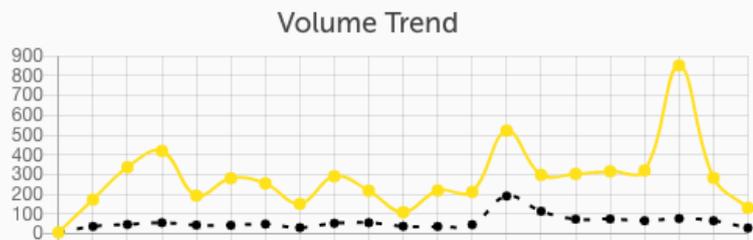
**What was unique about the brand?**

bill	phone	customer	hung
no	sewage	meter	
online	leak	flats	

Thames Water accounted for almost 25% of all tweets analysed in this study, almost twice as much volume as the second most talked about water company. They came bottom of the league table with their average sentiment score for the month consistently and at times substationally sitting below the market average.



**Bills and customer service** were particular problem areas for Thames Water, but it was water pressure that received the most volume, accounting for 29% of all their mentions.



A lot of customers experienced **inconsistencies with their direct debit** payments, some of whom were in financial difficulty due to COVID-19.



Many customers vented frustration at **phone lines cutting off or being hung up on** after long wait periods without getting through to a representative.



Water outages left residents concerned they couldn't **wash their hands**, with anxieties heightened due to COVID-19.



### Engineers

Appreciation was shown for engineers that helped coordinate the water supply to the temporary Nightingale Hospital.



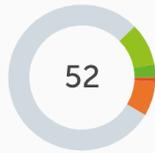
### Quick response

Where gratitude of quick resolutions were given, 32% were in relation to sorting issues with water pressure.



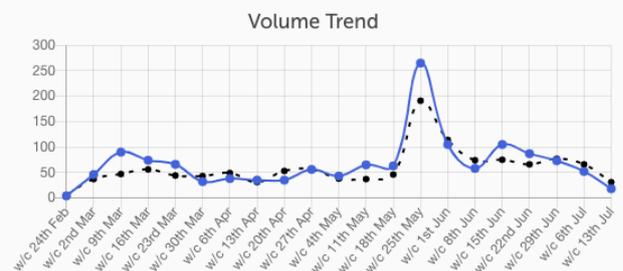
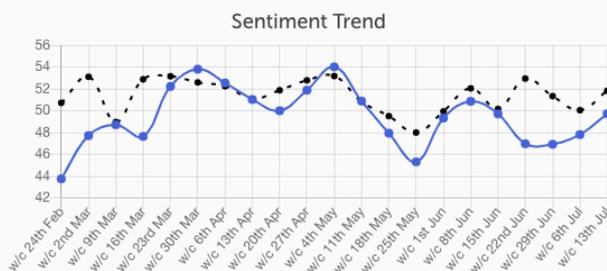
### Online bills

Customers were more likely to express the desire to pay their bills online in comparison to other companies.



**What was unique about the brand?**  
 reservoirs selfish burning furloughed  
 litter beauty fines  
 awards safe home

United Utilities were the fourth most talking about brand and ranked roughly halfway in our league table. Like other companies, water pressure was the most discussed topic, accounting for 17% of all conversations. They sat **below the market average sentiment trend for water pressure** and topped out just above the average volume level throughout the reporting period.



United Utilities' customers were **most likely to discuss the economic aspects of COVID-19**, with 47% of all "furlough" or "furloughed" mentions featuring in conversations about this brand.



Littering and rubbish really riled up customers, with 41% of all mentions of these topics residing from customers of this brand.

Although they ranked ninth in customer service, they had the third highest volume on this topic and **customers were noticeably more vociferous with praise** compared to other brands.



**Adam Higginson** @adamhigginson1 · Apr 24

@unitedutilities seriously have the best customer service I've ever come across 10/10



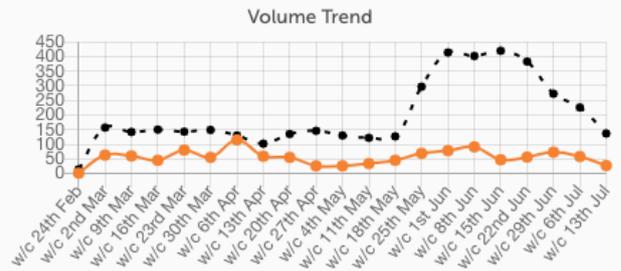
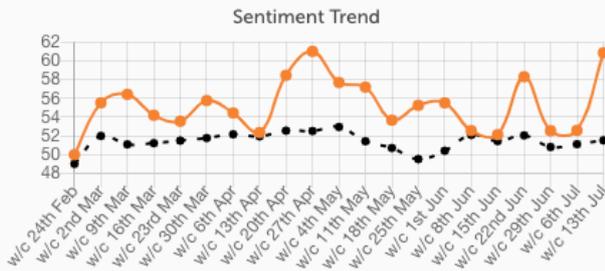
**Jayne Brindley** @dizzys\_girl · Mar 13

@unitedutilities fantastic customer service from me reporting a problem with a broken manhole cover to it being acted on within a couple of hours and being kept informed every step. Other companies should take lessons from you!! 🍌🍌 #welldone #takeabow

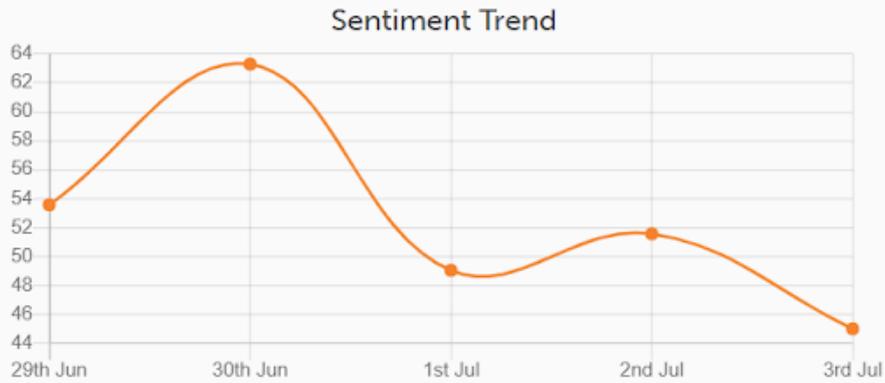


**What was unique about the brand?**  
 nhs support operator email  
 rebate research recycling  
 uniform community raw

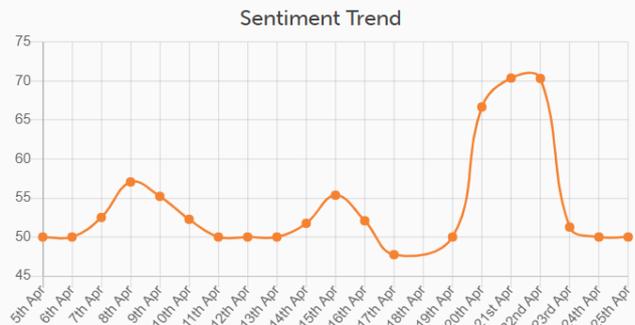
The criticism following the widely reported coverage of dumping sewage into the nearby River Avon was not well received. Despite this, customers of Wessex Water generally had a higher opinion of the brand compared to other brands, coming 2nd in the league table.



Following the reported **sewage dumping** at a nearby popular beauty spot, Warleigh Weir, there was passionate backlash from locals. This had a severe impact on the average sentiment score following the release of the story on 1st July:



The initiative which gave NHS workers a **rebate on their water bill** to enable them to wash uniforms in between shifts was extremely well received, demonstrated by the increase in sentiment when the announcement was made on April 19th.

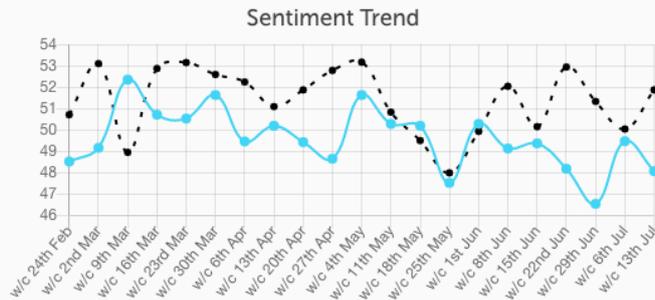




**What was unique about the brand?**

car	salmon	swim	look
open	safety	agreement	
project	smart	cat	

Yorkshire Water finished in the bottom half of the league table, driven by their performance around water pressure and water quality. PR around raw sewage dumping, which specifically flagged Yorkshire Water also impacted the overall sentiment score.



Graph shows Yorkshire Water's sentiment trend on water pressure with market averages in black

Water pressure contributed to 8% of total conversation mentioning Yorkshire Water, and brought the sentiment score down by 5 points to 47/100 on this topic. By the end of June, sentiment was -12% lower than average, but remained above the market average for the difficult May bank holiday weekend.

The beauty and space available for socially distanced walks around the reservoirs was positively discussed by local residents, improving the overall net sentiment towards the brand.

Whilst locals supported the move to keep unwelcome visitors from visiting the area at the height of the pandemic, the closure of car parks resulted in further problems for locals as visitors parked roadside.

park ... car 13	social distancing 8	yorkshire ... water 3	local ... people 3
moor ... reservoir 2	park ... lanes 2	street parking near 2	walk ... road 2
pavement ... walk 2	postponed ... notice 2	block ... people 2	beauty spot 2

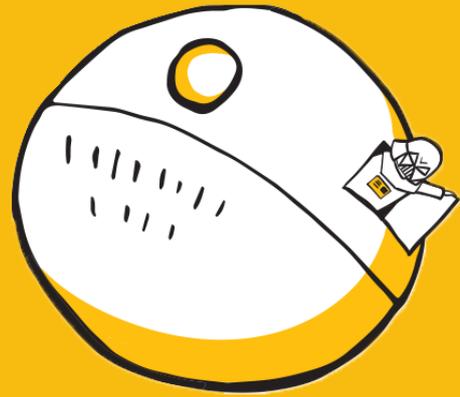


Fish pass completion around the Upper Don resulting in salmon for the first time in 200 years saw sentiment 22% higher than the average for the reporting period.



Significant praise for customer service - specifically giving credit for exceptional support with a shout out for the humour of staff and praise for engineers.

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Language is pretty weird. Young people use it very differently to older people, regions have their very own slang and sarcasm and irony are just great; we often mean the exact opposite of what we write. Don't even start us on spelling, punctuation, grammar and txt spk (roflcopter!).

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