



Testing the Waters

Business customers' views on their water and sewerage services 2018



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Foreword

It has been two years since we ran our last wave of Testing the Waters research, our large scale survey of non-household (NHH) customers in England and Wales. Since then, there has been a major change for NHH customers in England with the opening of the retail market on 1 April 2017.

For the first time, all NHH customers in England operating from business premises were able to exercise choice in terms of the retailer who bills them, reads their meters and provides customer service. The retail market was not opened in Wales and it remains the case that only those NHH customers who use over 50 Mega litres of water per year can exercise choice in terms of retail service providers. Having undertaken NHH customer surveys either side of market opening CCWater is in a unique position of being able to quantify the impact it's had on consumers' perceptions.

From May to August 2018, our research partner, Opinion Research Services (ORS), interviewed 2,300 NHH customers across England and Wales asking about their perceptions of their water and sewerage services, including (in England) the new retail market. We supplemented the quantitative results with 50 in depth interviews exploring individual experiences and what lies behind some of the survey responses.

We found that many customers remain completely unaware of the changes that have taken place in England. For those who are aware that the market is open, three fifths of them have not engaged in any way with it.

The results point to ripples of dissatisfaction in the NHH community. Levels of trust in water suppliers has decreased, and so have perceptions that suppliers care about customers. There is a stark contrast when comparing what customers in England and Wales think. Although most customers in Wales cannot choose their retailer in the same way their counterparts in England can, their satisfaction levels are much higher.

Our [highlights](#) report that accompanies this document considers the overall results and what they tell us about NHH customer perceptions. We'll look at satisfaction with wholesale water and sewerage services, the experience of switching, and the perceptions of care and trust and how this differs between England and Wales. We plan on building on the highlights report by looking at the key findings in more detail. Through understanding and sharing the consumer insights from this research we hope that all those involved in serving NHH customers can learn and improve in the future.

Dr Mike Keil

Head of Policy and Research

Consumer Council for Water

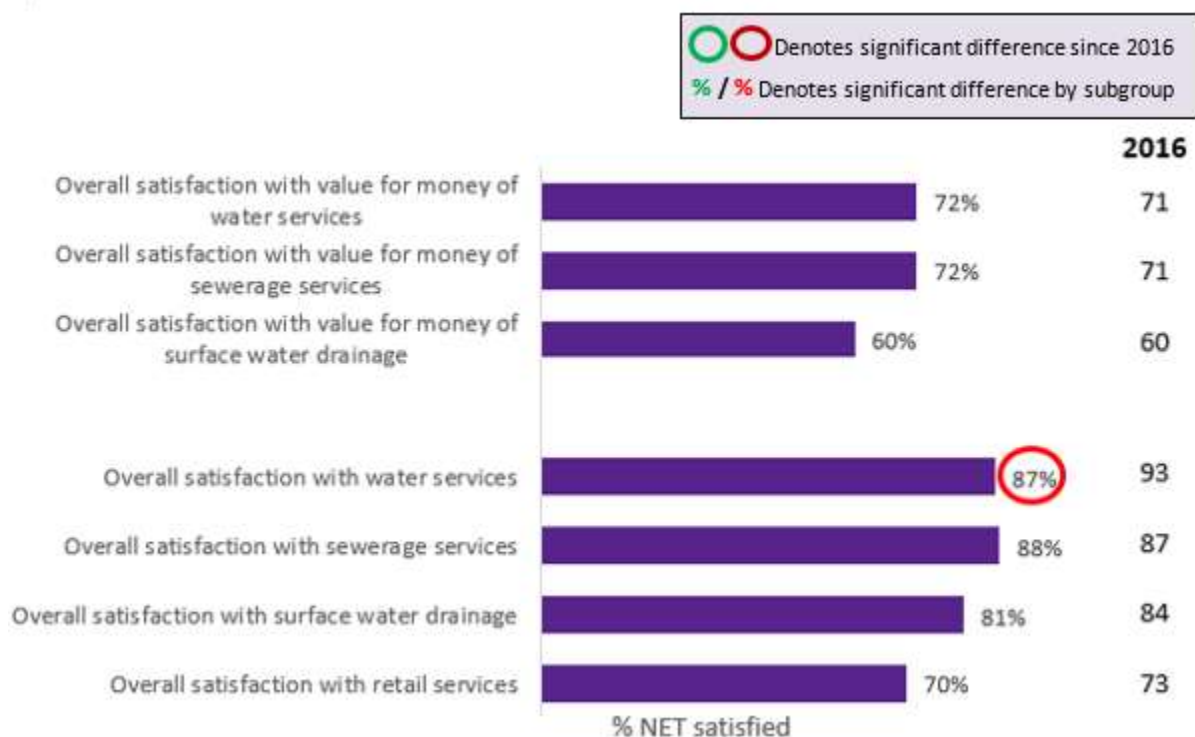
1. Executive Summary

- ^{1.1} Every two years, Consumer Council for Water (CCWater) commissions ‘Testing the Waters’, a satisfaction survey of business customers of the water industry in England and in Wales. This report looks at whether and how customer views have changed since the survey was last done in 2016; it presents views on wholesale water and sewerage services, retail services¹ and their providers, along with differences in views between businesses in England and Wales. It also shows how these views vary with business size, as defined by the number of employees. In total, 2,300 interviews were achieved via telephone with business water customers between 11th April 2018 and 15th August 2018.
- ^{1.2} Since 2003, there has been a market for retail services – that is the provision of customer service, billing and meter readings – in England and in Wales. Access to the market in England was initially based on how much water a business used i.e. it had to be above a certain volume each year and used at a business premise that was billed directly by a water company (rather than a landlord or managing agent).
- ^{1.3} In April 2017, the non-household (NHH) water market in England was opened to approximately 1.2 million directly billed businesses, charities and public sector organisations regardless of how much water they used. Since then, they have been able to choose who provides their retail services. In Wales, only business customers who use 50 megalitres a year at a business premise are eligible to access the market by choosing which company provides their retail services.
- ^{1.4} When the market opened in England, every eligible business was allocated a default retail service provider. This meant that their account was transferred from their water and/or sewerage company though these would continue to provide wholesale water and/or sewerage services. The ‘new’ company from April 2017 would handle billing, meter readings and customer service. So every business in England has experienced a change in the provider of retail services since the last survey was conducted in 2016, whether or not they are aware of, or engaged with the open market.
- ^{1.5} In Wales, businesses continue to be billed and supplied services by the incumbent water and/or sewerage companies, unless they meet the consumption eligibility criteria to switch.
- ^{1.6} The questionnaire for Testing the Waters has been updated to reflect these significant changes in the industry landscape since 2016. Where appropriate, it now includes questions about retail services and retail service providers to help understand current business customer experiences and enable comparisons between wholesale services and providers.

¹ Wholesale services refer to the supply of clean water and removal and treatment of waste water, including where applicable rainwater drainage and trade effluent services. Retail services comprise the provision of customer services, billing, and reading water meters.

Key findings

Figure a: Satisfaction with Value for Money and Services Summary 2018²



Satisfaction with water services has fallen significantly since 2016; satisfaction with sewerage services is unchanged

- ^{1.7} Overall satisfaction with water services has fallen significantly in England from 93% in 2016 to 87% in 2018. Satisfaction in Wales has remained constant at 93% in 2018, as in 2016. However, the way this question was asked was changed from 2016 which may have affected on the findings.
- ^{1.8} Satisfaction with water services has fallen, specifically among microbusinesses³, which make up the majority of all business customers. In 2018, satisfaction fell to 86% among micro-sized businesses – significantly lower than in 2016 (93%).
- ^{1.9} Satisfaction with sewerage services in England (88%) and in Wales (92%) is in line with 2016 (87% and 88% respectively).

Satisfaction with value for money of water and of sewerage services is broadly consistent with 2016

- ^{1.10} Across England and Wales, satisfaction with value for money of water and sewerage services (both 72%) had remained broadly consistent with 2016 (both 71%). However, satisfaction with value for money of

² The bar charts and other graphics show the proportions (percentages) of businesses making relevant responses. Green and red circles are used to denote results in 2018 which are significantly higher or lower than 2016 results, and figures coloured in green and red indicate significantly higher or lower results between subgroups, e.g. England and Wales.

³ Microbusinesses employ between 0 and 9 employees and make up 86% of the business market. This is according to ONS UK Business Counts when taking into account eligibility (see methodology chapter).

water services in Wales was significantly higher in 2018 (86%) compared to 2016 (72%), as was satisfaction with the sewerage service (84% in 2018 compared to 69% in 2016).

- 1.11 In England and Wales, satisfaction with value for money was highest for trade effluent removal (83%) and lowest for surface water drainage (60%). However, satisfaction with the value for money of surface water drainage has increased significantly among large businesses since 2016. 75% of large businesses were satisfied with the value for money of surface water drainage in 2018, compared to 53% in 2016.

Higher satisfaction with retail services in Wales than in England

- 1.12 In 2016, before the opening of the retail water market in England, respondents were asked to rate their satisfaction with customer service, meter reading and billing services as provided by the water company at the time and 73% of business customers were satisfied. In 2018, high level results across England and Wales remained similar to the 2016 results. However, satisfaction significantly differed between England and Wales. While 69% of respondents in England expressed satisfaction, 90% were satisfied in Wales.

Perceptions of bill clarity are similar to 2016

- 1.13 81% of business customers overall in both England and Wales think their bills are clear, compared to 85% in 2016. Agreement was slightly, but not significantly higher in Wales (89%) compared to England (81%).

Customers' trust in water wholesalers and belief that wholesalers care has fallen significantly since 2016

- 1.14 Trust in the company providing their wholesale water services is significantly higher in Wales than in England. In Wales 54% gave the company providing their wholesale services a score of 9 or 10 out of 10 for trust, compared to 27% in England. Trust in water wholesalers among customers in England has fallen significantly from 35% in 2016.
- 1.15 In 2016, respondents were asked whether they agreed or disagreed that their water services supplier cared about the service provided to them. In 2018, this question was asked separately of the wholesale water company and retail company in England. In England, 51% agreed their water wholesaler cared about the service it gives to business customers, while 45% agreed that their retail company cared. 78% of customers in Wales agreed their water company (which provides both water and retail services) cared about the services it provides.

The Net Promoter Score (NPS) for water wholesalers across England and Wales is +6, similar to 2016; for retailers it is -20

- 1.16 Business customers were asked how likely they would be to recommend the company providing their water wholesale services, and the company they used for retail services on a scale of 0 to 10, where 0 means highly unlikely to recommend and 10 means extremely likely.⁴

⁴ NPS segments respondents into three categories; those giving scores of 0 to 6 are classified as Detractors, scores of 7-8 as Passives and 9 or 10 as Promoters. The overall NPS is calculated by subtracting the proportion of Detractors from the proportion of Promoters. The higher the NPS score, the more positive customers are. Scores range from -100 to +100, and a negative score indicates a greater proportion of detractors than promoters.

1.17 For wholesalers the NPS was +6 across England and Wales, splitting to +4 for England, while Wales scored significantly higher at +47. However, the NPS for retailer service providers is -20 overall, indicating more detractors than promoters and much lower likelihood to recommend than for wholesalers. Again, results varied by country. The average NPS for retail service providers in England was -22, compared to a significantly higher score of +26 in Wales.

Levels of contact are higher in England. Customers in Wales are more highly satisfied with contact

1.18 Overall, 29% of respondents had made contact with their retailer or wholesale water service provider with an enquiry or complaint in the 12-16 months since April 2017. This compared to 13% in 2016 when asked about contact over the previous 12 months. These results matched the experiences in England, but in Wales only 16% had contacted their supplier in 2018 compared to 12% over the previous year in 2016.

1.19 40% contacted their wholesaler, while 60% contacted their retailer. 62% of those who contacted their wholesaler were satisfied, while 50% who contacted their retailer expressed satisfaction.

1.20 The most common reason for making contact was a billing enquiry (58%), significantly higher than in 2016 (41%). The proportion making contact to report a sewerage problem (5%) or to make a complaint (1%) had significantly decreased since 2016.

1.21 When asked about individual aspects of their contact, customers' perception of the quality/clarity of information provided significantly decreased to 59% from 72% in 2016. Nevertheless, customers in Wales were significantly more likely to be satisfied with the quality/clarity of information (84%) compared to those in England (59%). Respondents in Wales were also significantly more likely to be satisfied with the ease of contacting someone who could help them, the knowledge and professionalism of staff, and the feeling that their query had been or would be resolved when compared to England.

Awareness of retail competition has increased significantly in England and Wales since 2016; but three-fifths of these have not done anything to engage in the market

1.22 While almost all businesses in England believed it was possible to switch electricity provider (91%) or telecoms provider (86%), fewer believed it was possible to switch water retailer (61%).

1.23 When asked directly whether they were aware that since April 2017 the market had opened up to allow them to switch retailer or move to a better deal with their existing retailer, 43% of customers in England said that they were aware. Only 22% of respondents in Wales were aware of the Welsh water market (where businesses who use more than 50 megalitres a year can switch). However, awareness in both England and Wales was significantly higher in 2018 compared to 2016.

1.24 Of those in England who were aware of the market before taking part in this survey, 22% had taken action either by switching retailer (14%) or renegotiating (8%). While 12% had looked for information and not yet switched, 8% had looked but decided not to. The remaining 58% of respondents who were aware of the water market had taken no action to find out about it or engage with it.

- 1.25 Of the 91 businesses that had switched, 87% said that they were satisfied with the switching process. For the 13% of switchers who were not satisfied with the switching process, almost all (91%) felt that the switch took too long.
- 1.26 Among the respondents in England who had looked for information about the market but decided not to switch or renegotiate, around a quarter felt that they were either too busy or that it wasn't a priority (27%), or that they were happy with the service from their current provider (25%). Other common reasons included that there wasn't a big difference in price or quality (15%), that the water bill was currently small (11%) or they were simply not interested (11%).

The bill savings required to motivate engagement in the market have fallen

- 1.27 When those in England were asked what percentage level of saving would encourage them to switch, those saying that they would not switch (15%) or that they would only switch for service, not price (5%) had significantly decreased compared to 2016 (23% and 9% respectively). Those saying that they would switch for between 1-5% savings significantly increased from 11% in 2016 to 19% in 2018.
- 1.28 In terms of future intentions, 28% of respondents in England said they would consider switching in the next 6 months, while 42% said that they would consider negotiating or finding out information about the water market (47%).
- 1.29 Table C below shows a comparison of key results for customers in England and in Wales.

Table b: Comparison of results for England and Wales

	England		Wales	
	Count	%	Count	%
Satisfaction with...				
Water services	1,787	87%	502	93%
Sewerage services	1,284	88%	375	92%
Surface water drainage	312	81%	60	85%
Trade effluent	72	85%	21	65%
Retail services	1,755	69%	498	90%
Satisfaction with value for money of...				
Water services	1,736	71%	488	86%
Sewerage services	1,463	71%	377	84%
Surface water drainage	395	59%	70	72%
Trade effluent	93	84%	26	62%
Agreement that...				
It is clear how much needs to be paid and when	1,746	81%	490	89%
The water wholesaler cares about the service it gives to business customers	1,685	51%	486	78%
Trust in...				
Water wholesaler (% scoring 9 or 10)	1,721	27%	498	54%
Satisfaction with contact...				
Ease of contacting someone who was able to help	498	61%	103	87%
Quality/clarity of information	500	58%	103	84%
Knowledge and professionalism of staff	492	63%	100	86%

Feeling the contact had been/would be resolved	496	55%	103	79%
Kept informed of progress	482	52%	98	71%
Overall contact	504	54%	102	82%
Awareness of...				
The market prior to the survey	1,725	43%	486	22%

2. Methodology

2.1 Research objectives

- ^{2.1} The objectives of this research were to measure and track the following for England and Wales (combined), England, Wales, Water and Sewerage Company (WaSC) region:
- Business customer perceptions of value for money across all aspects of water and sewerage services
 - Customer satisfaction with service delivery by the water industry including:
 - satisfaction with specific services provided for wholesale and retail;
 - satisfaction with any contact with wholesalers or retailers;
 - perception of wholesaler and retailer attitude to their business customers;
 - perceptions of suppliers – specifically, levels of trust in them and belief that they care about customers; and
 - likelihood to recommend suppliers for the services provided
 - Business' experiences of the retail market, including:
 - awareness of the market, retailers, services and where to find information;
 - likelihood and experiences of switching to a new retailer or renegotiating with the current one.

2.2 The Approach

- ^{2.2} In total, 2,300 interviews were conducted with non-household (NHH)⁵ water customers between 11th April and 15th August 2018. The survey was conducted using a Computer Assisted Telephone Interviewing (CATI) approach and achieved a response rate of 10%. A pilot was initially conducted with around 50 organisations in order to ensure that the average interview length did not exceed 15 minutes and to test the effectiveness of new questions introduced since 2016. Following the pilot some questions were removed and others were simplified.

2.3 The Sample

- ^{2.3} The sample of non-household customers consisted of businesses, charities and public-sector organisations in England and Wales. It was selected from data purchased from Dun & Bradstreet, a commercial source of business contacts. This sample contained an indication of the size of the business as well as business sector. Sample was selected to take into account differences in levels of non-response historically among different business sectors.
- ^{2.4} The sample design aimed to achieve a roughly equal number of interviews in each of the ten Water and Sewerage Company (WaSC) regions in England and Wales in order that comparisons could be made between experiences in each water region. Around 200 interviews were conducted in each WaSC region for this purpose. A booster of an additional 300 interviews increased the sample for Wales to 500 to make more robust comparisons between customer experiences in England and Wales, where eligibility for the water market differs. Small (10-49), medium (50-249 employees) and large (250+ employees) organisations were also oversampled in order to draw meaningful comparisons between organisations sizes. Loose quotas were set by Standard Industrial Classification (SIC) to ensure a good representation of different business sectors.
- ^{2.5} In 2016, quotas were set on business size and at company level by water-only companies (WoC) as well as WaSC to move away from WaSC region level reporting and enable analysis of company level data. In

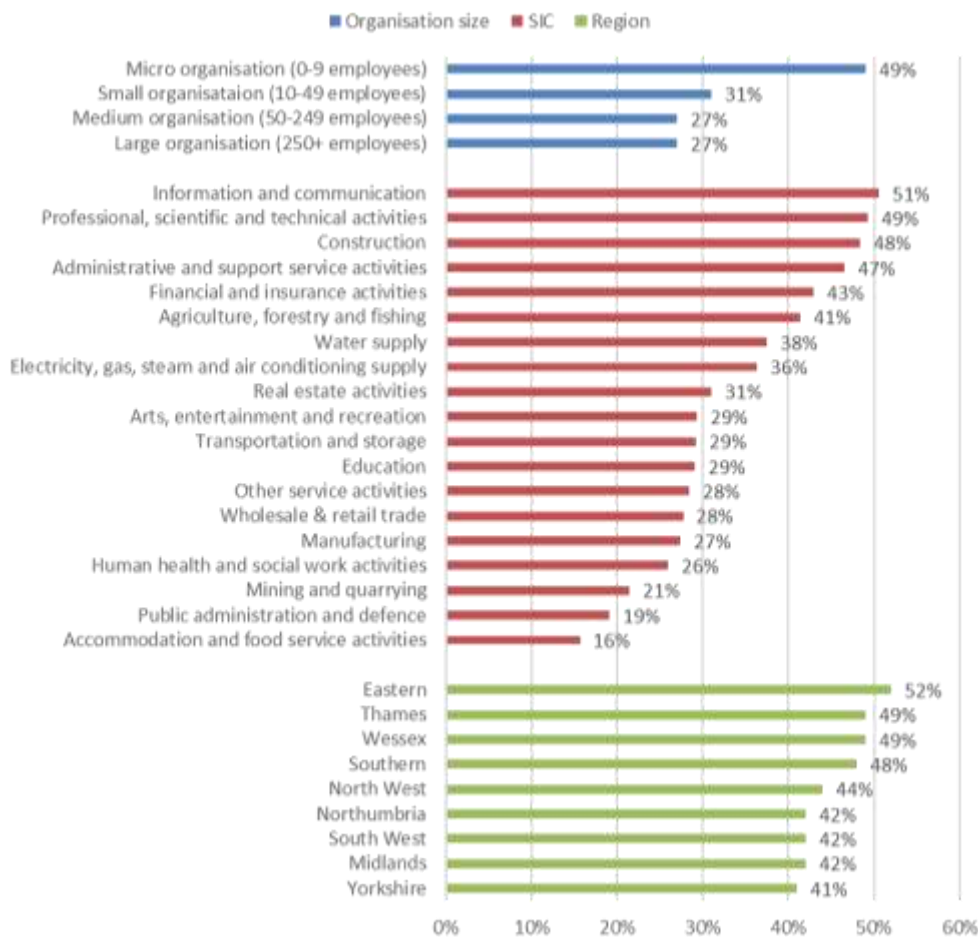
⁵ Non-household customers include businesses, charities and public sector organisations

2018, quotas were not set by WoC, but instead those organisations using a water-only company for their water supply fell out randomly within the WaSC quotas.

2.4 Organisation Eligibility for the market

- 2.6 Not all businesses, charities and public-sector organisations are eligible to switch their retail service provider in either the open market in England or in Wales. The organisation must operate from a business premises and not use a household water supply (i.e. those who run a business from their own home are not eligible). Further, some organisations that rent their business premises will do so with the utility services billed to the landlord, so they are not responsible for who supplies their retail services (along with other utilities) and aren't able to choose the retail service provider.
- 2.7 The same criteria used to determine market eligibility has historically been used by CCWater for establishing business customer eligibility to take part in the sample for previous iterations of this survey.
- 2.8 Having conducted previous research with business customers, ORS was able to create an estimate of the eligible population using questions to assess eligibility. Respondents were determined to be ineligible to switch retailer and were screened out either because their water supply was provided by their landlord (so their business premise did not receive its own water and sewerage services bill), or because the business only had a household water supply. For respondents in Wales, only those using 50 megalitres or more annually can switch, which means that the majority of businesses are not eligible to switch. Therefore, the sample in Wales includes responses from all non-household customers including those using less than the annual threshold. Customers who don't manage their own utilities or operate from home were still screened out in Wales.

Figure c: Ineligibility of organisations in the population (estimate)



- 2.9 Overall, 47% of organisations were ineligible to switch. Eligibility varied substantially by business size, type and region. Almost half (49%) of all micro organisations included in the sample were not eligible (partly due to many being home based and not having dedicated premises), but more than a quarter (27%) of medium and large organisations were also not eligible (mainly as services were provided by the landlord). The proportion of ineligible organisations in the sample was also higher in the Eastern region (52%), due a higher proportion of micro organisations being ineligible in this region.

2.5 Screening

- 2.10 In order to ensure that participating business customers were eligible, respondents were asked screening questions at the beginning of the survey which established whether the organisation had any business premises in England or Wales, and whether the organisation was run from a business site rather than a home residence. Respondents were also asked whether they were responsible for paying the bill/dealing with utility suppliers.

2.6 The Questionnaire

- 2.11 The questionnaire was reviewed and updated to reflect the changes that had taken place following the previous research in 2016. Since then, the market has opened fully in England and all businesses in England have either been transferred to a default retail service provider or chosen to switch to the retail service provider of their choice. Different questions were included for businesses in Wales to reflect the different situation in Wales. In Wales the vast majority of business have not been transferred to a default retail service provider and remain with the incumbent water and/or sewerage service provider.
- 2.12 Questions were asked at the beginning of the survey to establish profile information about each responding business customer. This included questions about the postcode of the site they usually worked at; the number of the employees at that site, as well as at all sites in England and Wales; the number of sites in England and in Wales; about which wholesaler supplied their water and sewerage services; the business sector (SIC) of the organisation; the amount paid annually for water and sewerage services at that site, and what proportion of total annual running costs the water and sewerage services represent.
- 2.13 Where respondents did not know their sewerage wholesaler, this was established using the postcode for the site the respondent usually worked at. Any of these organisations which were situated in a border area between two water regions (i.e. could be supplied by two or more wholesalers) were flagged in the returned data to check for any influence this could have on results. However, the total number of organisations interviewed in border regions was low (38) and had little impact on overall results.
- 2.14 Due to potential confusion expressed by customers about what constituted switching retailer, any respondent who said they had switched were asked a follow-up question confirming that they had actively chosen to switch and an additional explanation of the change to the market if necessary. This helped to distinguish these from customers whose water company had exited the market and moved their customer base as a whole to a new retailer.
- 2.15 For organisations that hadn't switched, when asked which company provided their retail services, respondents' answers were checked against the default retailer for their wholesale region. To ensure accuracy, respondents were prompted with this information in the event that their response did not match this data or if they didn't know who their retailer was.

2.7 Weighting

2.16 While roughly equal numbers of interviews were achieved in each WaSC region, the number of organisations in each region varies. For example, there are just over 65,000 in the Northumbria WaSC region to approaching 700,000 in the Thames region. Small, medium and large organisations were oversampled to achieve enough interviews for meaningful comparisons to be made by organisation size.

Any differences between the achieved sample and the overall population were corrected by statistical weighting.⁶ This process ensures that the overall results are representative of all eligible organisations across the whole of England and all organisations in Wales.

2.17 Discrepancies between the 2016 weighted profile of respondents and the actual population of businesses, as well as the fact that weighting in 2018 used the more accurate population of *eligible* businesses (rather than all businesses) meant that the 2016 data needed to be re-weighted in 2018 for comparability. For this reason, 2016 results reported here may not match those reported in the 2016 Testing the Waters report.

2.8 Interpretation of the Data

2.18 A sample, rather than the entire population of businesses based in England and Wales, has been interviewed. As a consequence, all results are subject to sampling tolerances, which means that not all differences in results between different groups within the population are necessarily statistically significant. Throughout the report, significant differences between 2016 and 2018 results and between sub-groups of the population are noted. Most charts show comparisons with comparable questions in 2016 only, but where similar questions have been asked in the 2014 and 2012 waves of the survey, these have been included in charts for comparative purposes. Potential issues with comparability between years are highlighted throughout the report.

2.19 Where differences between subgroups within this survey or the previous survey have been highlighted as significant, this means there is a 95% probability that the difference is significant and not due to chance. Significance testing was done using the effective sample size to take into account the weighting effects. Differences that are not said to be 'significant' or 'statistically significant' are indicative only. When comparing results between subgroups, generally, only results which are significantly different are highlighted in the text.

2.20 Please note that where percentages do not add up to 100, this may be due to rounding, the exclusion of 'don't know' categories, or multiple answers.

2.21 Figures with low base sizes (<70) are marked with an asterisk (*). In some cases, figures with very low base sizes (<20) have been excluded from charts for clarity.

2.22 Graphics are used extensively in this report to make it as user friendly as possible. The bar charts and other graphics show the proportions (percentages) of respondents making relevant responses. Green and red circles are used to denote results in 2018 which are significantly higher or lower (respectively) than 2016 results, and figures coloured in green and red indicate significant differences (higher and lower, respectively) between subgroups, e.g. England and Wales.

⁶ See Appendix 2 for details

2.23 Table D shows the confidence intervals based on effective sample size. Often confidence intervals are reported using nominal base sizes; however, effective sample size takes into account the sample design and associated weighting effects.

Table d: Statistical reliability

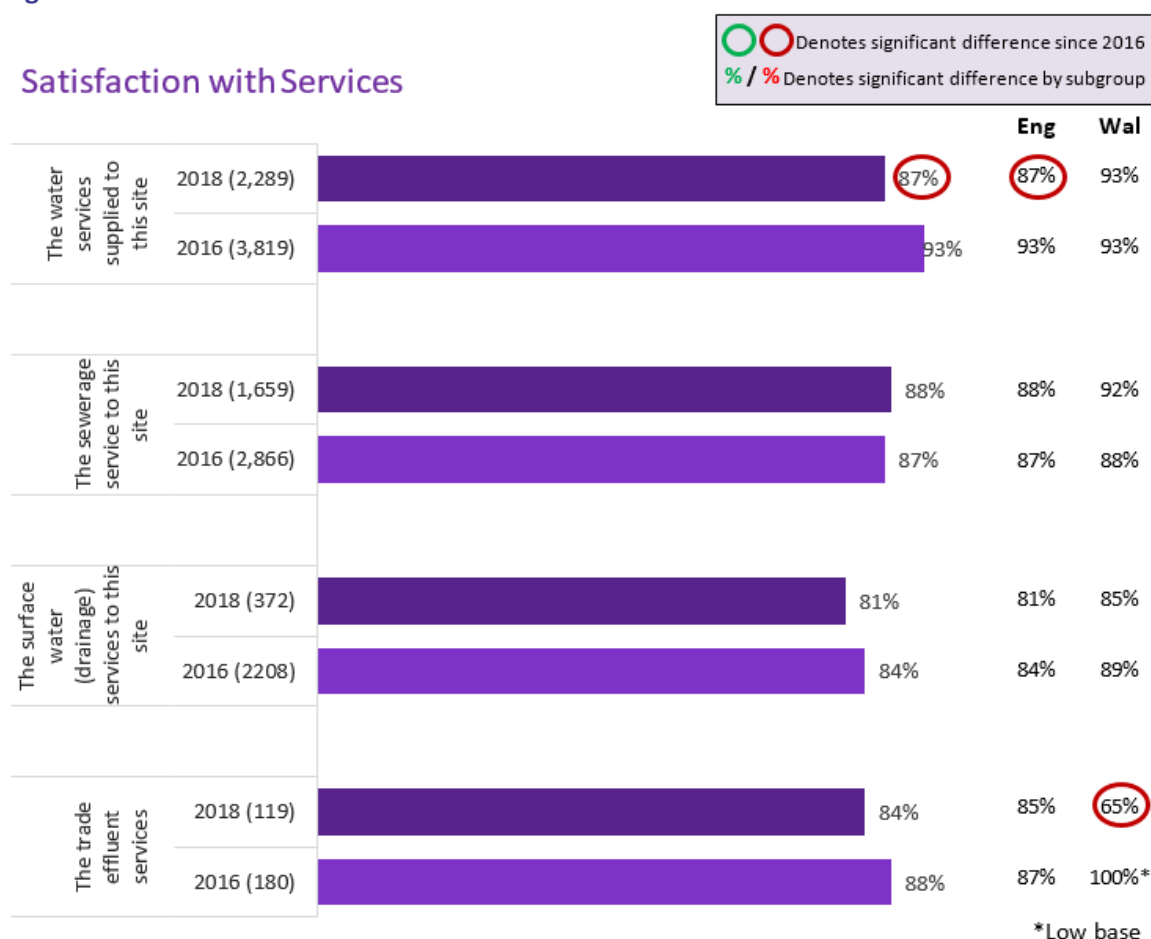
Base Size	Approximate confidence intervals applicable to percentages at or near these levels			
	Effective sample size	90% or 10%	70% or 30%	50%
2,300 (total sample: England and Wales)	575	±2.5%	±3.7%	±4.1%
1,795 (England)	522	±2.6%	±3.9%	±4.3%
505 (Wales)	264	±3.6%	±5.5%	±6.0%
1,130 (Micro 0-9 employees)	421	±2.9%	±4.4%	±4.8%
556 (Small 10-49 employees)	241	±3.8%	±5.8%	±6.3%
221 (Medium A 50-99 employees)	113	±5.5%	±8.5%	±9.2%
147 (Medium B 100-249 employees)	67	±7.2%	±11.0%	±12.0%
348 (Medium 50-249 employees)	167	±4.5%	±6.9%	±7.6%
207 (Large 250+ employees)	100	±5.9%	±9.0%	±9.8%

3. Data Report

3.1 Satisfaction with water and sewerage services; water saving activities

- 3.1 This chapter covers business customer satisfaction with water and where provided, sewerage services, including surface drainage and trade effluent. It also includes the water saving activities which businesses are undertaking.
- 3.2 Figure 1 shows satisfaction with water and sewerage services. This is followed by Figures 2 and 3 which show the causes of dissatisfaction with water and with sewerage services respectively. Figure 4 then shows satisfaction with wholesale services for each WaSC region. Figure 5 shows water saving activities compared to 2016, and Figure 6 shows this by whether the business has engaged with the market (switched or renegotiated) or not.

Figure 1: Satisfaction with water, sewerage, surface water drainage and trade effluent services in England and Wales⁷



⁷ Caution should be applied when making comparisons between 2016 and 2018 findings for satisfaction with water and sewerage services. In 2016, every respondent was first asked to rate their satisfaction across different aspects of each service (e.g. for tap water *colour and appearance, taste and smell, hardness/softness* plus other aspects) before being asked to rate their overall satisfaction. In 2018, each respondent was asked for their satisfaction with the overall service, and they were only asked to rate their satisfaction with each aspect of service if they initially said they were dissatisfied. This could have had an effect on findings.

N.B. Green and red circles are used to denote results in 2018 which are significantly different to 2016 results, and figures coloured in green and red indicate significant differences between subgroups, e.g. England and Wales.

Figure 2: Causes of dissatisfaction with water services

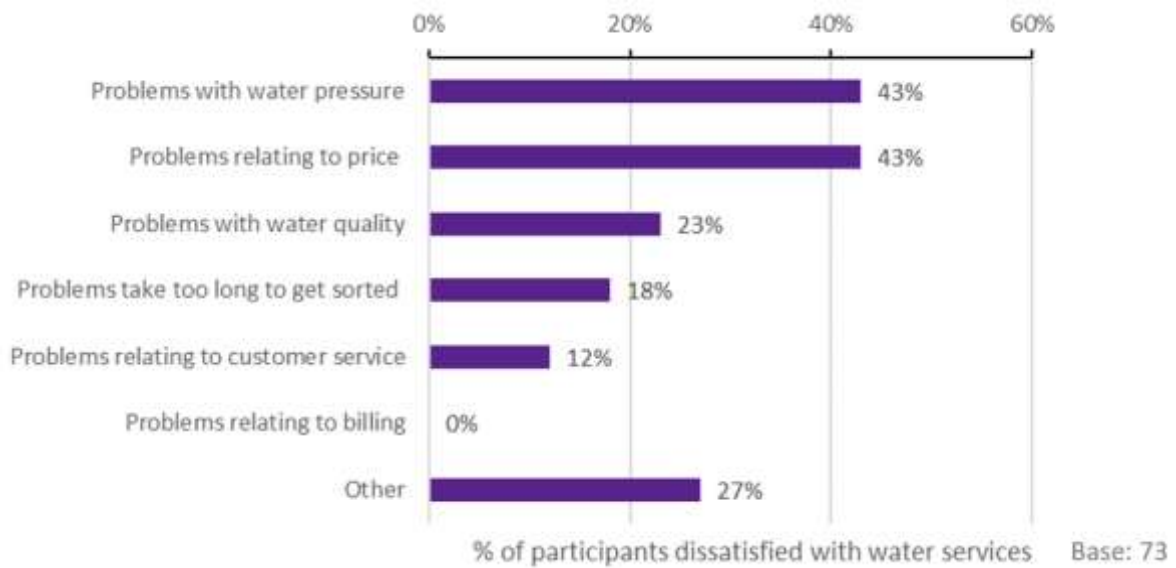


Figure 3: Causes of dissatisfaction with sewerage services

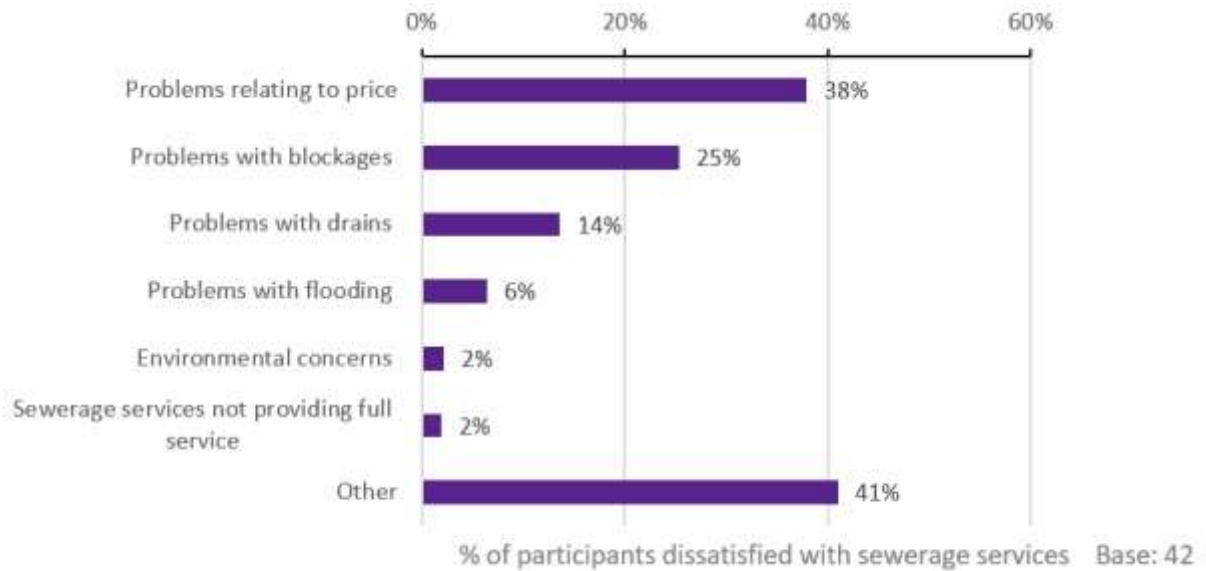
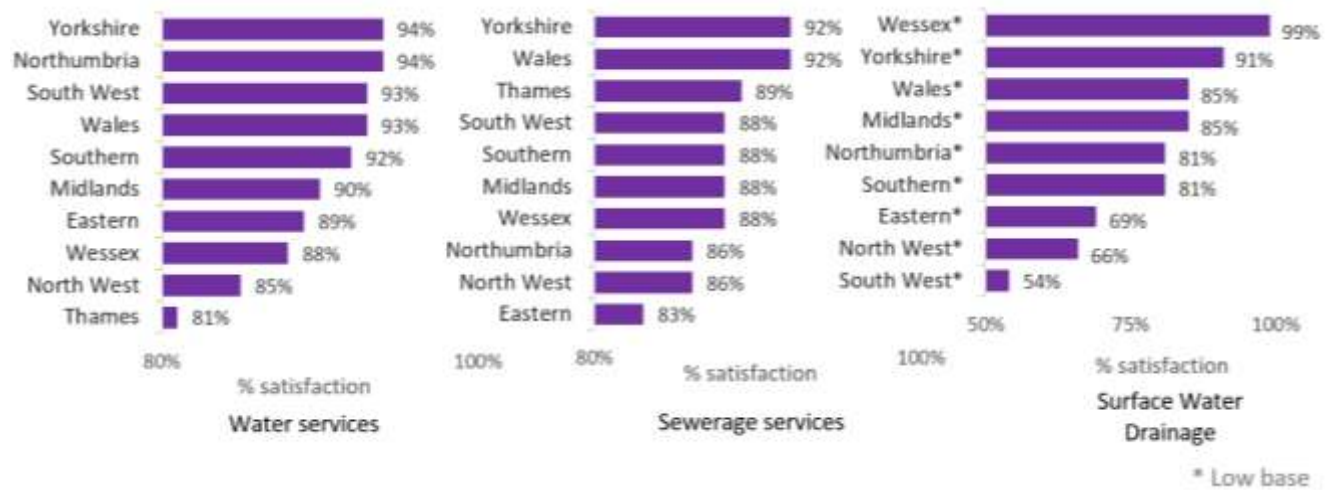


Figure 4: Net satisfaction with wholesale services by WaSC region



	Water services	Sewerage service	Surface water drainage	Trade Effluent
Eastern	89%	83%	69%*	**%
Wales	93%	92%	85%*	**%
Northumbria	94%	86%	81%*	**%
Midlands	90%	88%	85%*	**%
South West	93%	88%	54%*	**%
Southern	92%	88%	81%*	**%
Thames	81%	89%	**%	**%
North West	85%	86%	66%*	**%
Wessex	88%	88%	99%*	**%
Yorkshire	94%	92%	91%*	**%

% Net Satisfied cell shading key: 2 least satisfied regions / 2 most satisfied regions

*Low base

None of these differences are statistically significant

Figure 5: What are businesses in England and Wales doing to use less water?

Action taken to save water

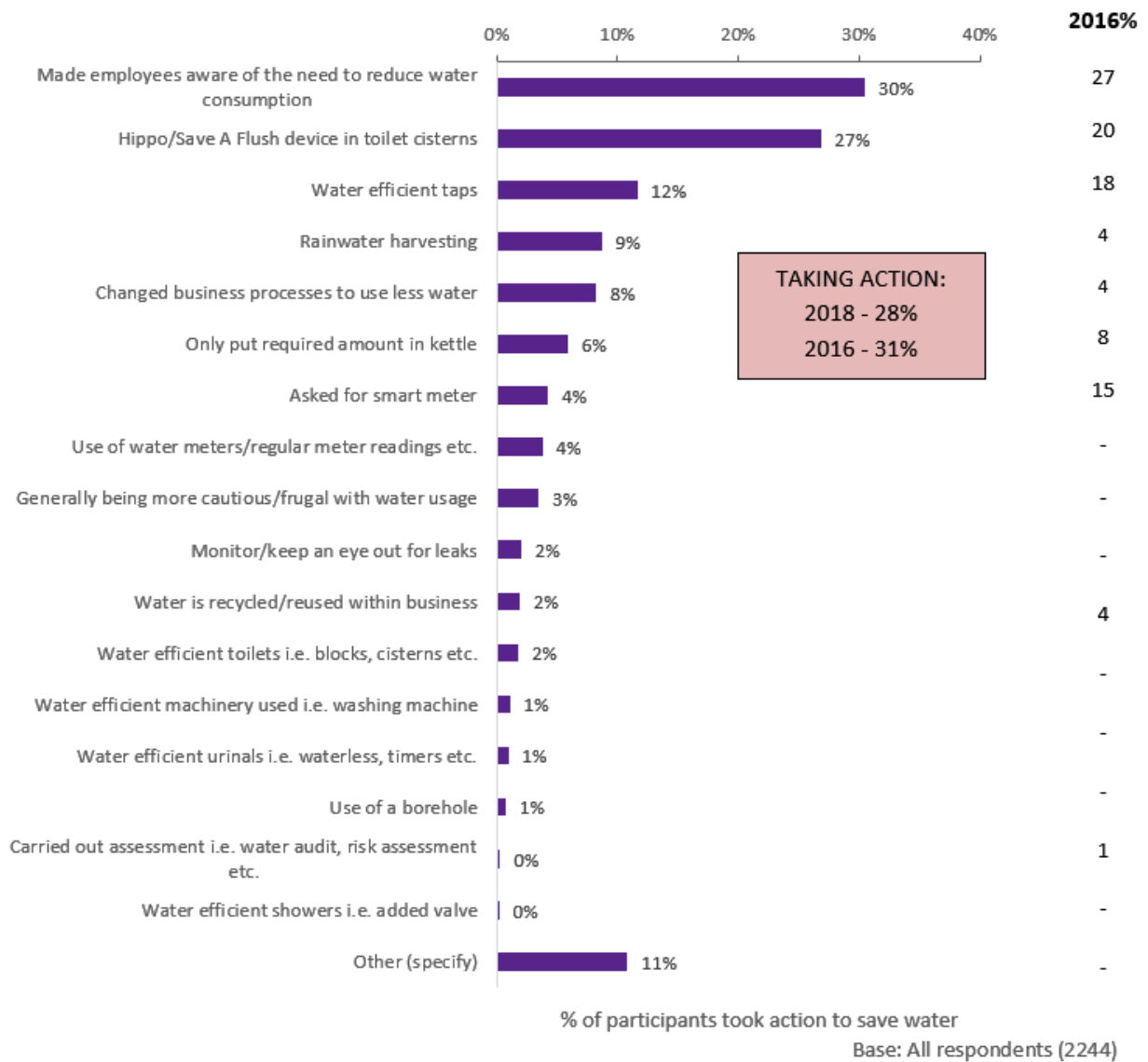
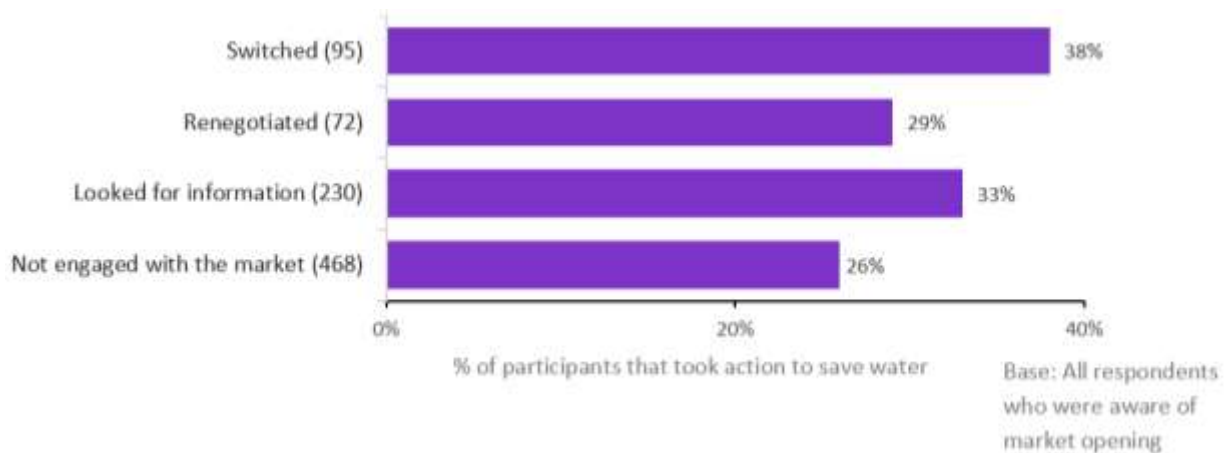


Figure 6: Action taken to save water by whether engaged in the market or not



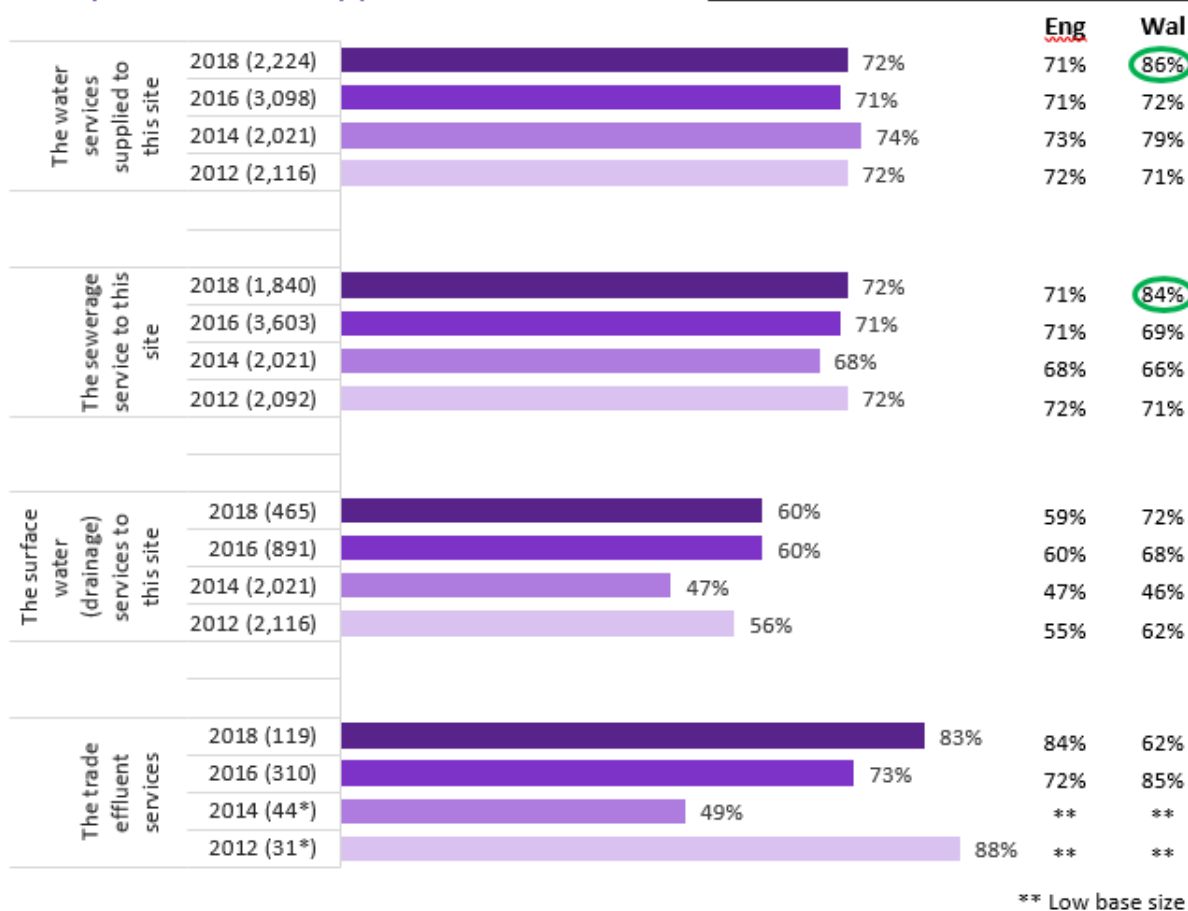
3.2 Satisfaction with Value for Money of services

- 3.3 This chapter presents views on the value for money of charges paid for water, and, where provided, sewerage, surface water drainage and trade effluent services.⁸
- 3.4 National views are shown in Figure 7 below. This is followed by Figure 8 which sets out the causes for dissatisfaction with value for money aggregated across all four services.

Figure 7: Value for money of water and sewerage, surface water drainage and trade effluent services in England and Wales

Satisfaction with Value for Money of Services Supplied

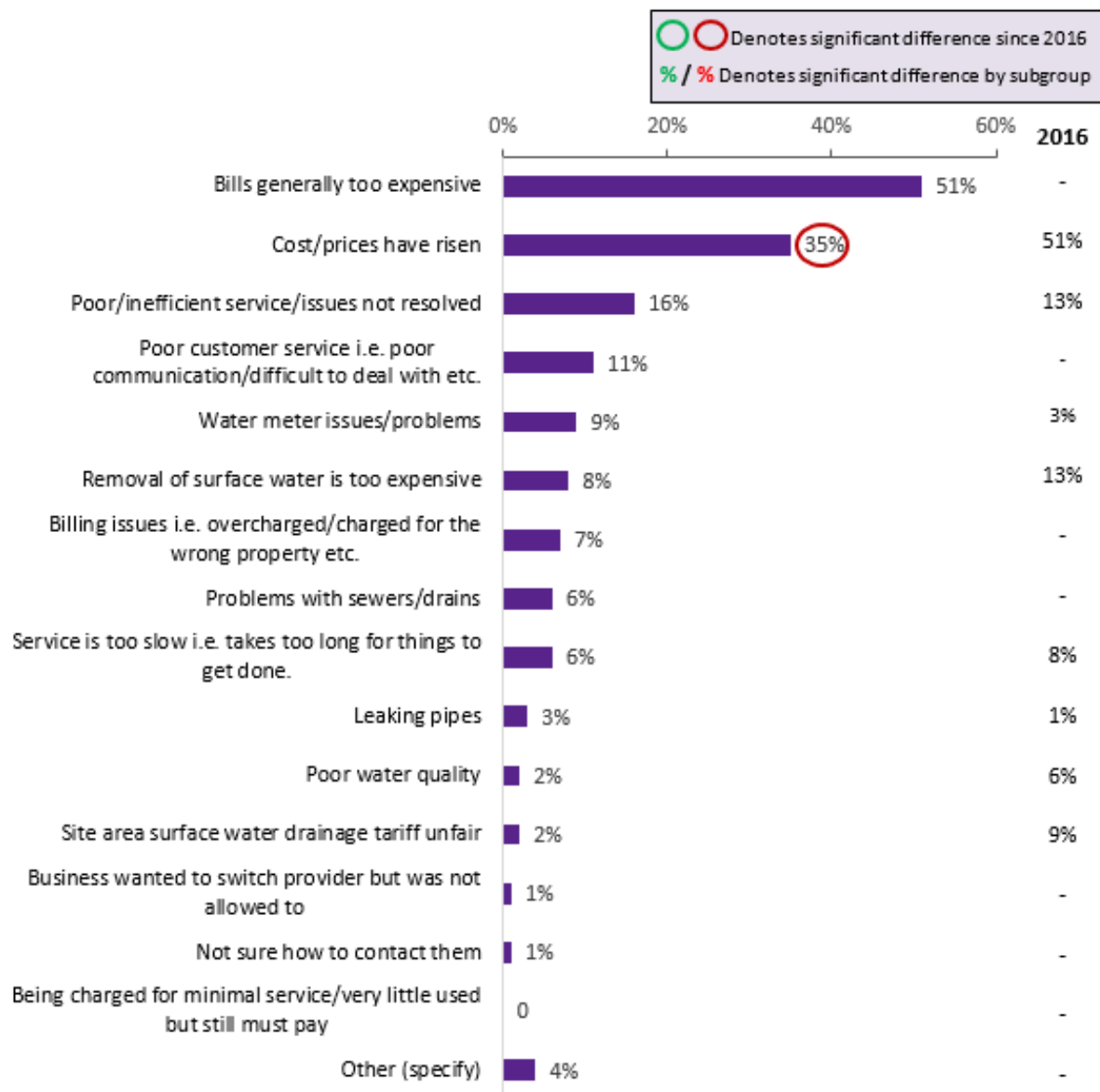
○ Denotes significant difference since 2016
 % / % Denotes significant difference by subgroup



** Low base size

⁸ In England, bills for water and sewerage services are issued by the retail service provider, charging on behalf of the water and sewerage provider. The charges shown on the bill for water and sewerage services include costs for the provision of retail services (approximately 10% of the total bill) as well, although this is not itemised on bills. Therefore, it was not viable to ask customers for views on the value for money of retail services to make a distinction from the value for money of wholesale water and sewerage services. When interpreting views on the value for money of water and sewerage services, it should be borne in mind that a small proportion of the bill relates to retail services. Note that when this question was asked in 2016 part of the bill also covered what retail services are now – in that respect the findings are comparable with 2016.

Figure 8: Causes of dissatisfaction with value for money of wholesale water, sewerage, surface water drainage and trade effluent services⁹



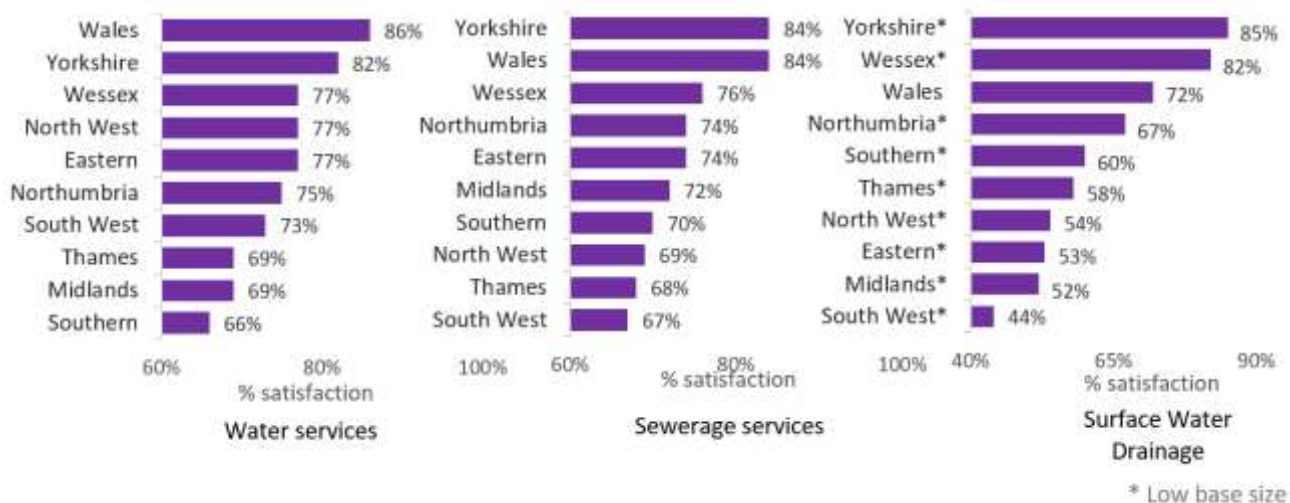
% of participants who are dissatisfied with the value for money of any service

Q. Why do you think you don't get value for money?

Base: All respondents dissatisfied with the value for money of a service (248)

⁹ In 2018, new response options were included based on respondents' answers. Responses which might have been grouped under one option in 2016 may have been split between different options in the more detailed code frame used in 2018. For this reason, the statistically significant change between 2016 and 2018 should be viewed with caution.

Figure 9: Satisfaction with value for money of water, sewerage, surface water drainage and trade effluent services by WaSC region



	Water services	Sewerage service	Surface water drainage	Trade Effluent
Eastern	77%	74%	53%	**%
Wales	86%	84%	72%	62%
Northumbria	75%	74%	67%	**%
Midlands	69%	72%	52%	**%
South West	68%	67%	44%	**%
Southern	73%	70%	60%	**%
Thames	66%	68%	58%	**%
North West	69%	69%	54%	**%
Wessex	77%	76%	82%	**%
Yorkshire	82%	84%	85%	**%

% Net Satisfied cell shading key: 2 least satisfied regions / 2 most satisfied regions

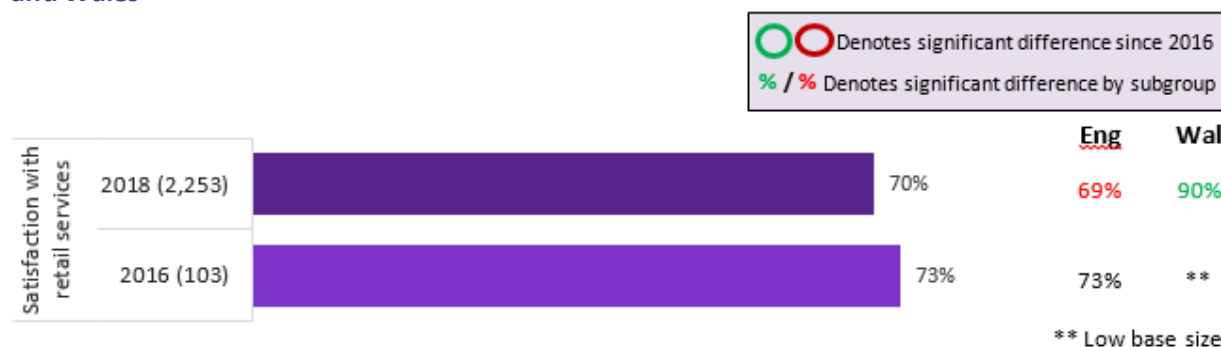
Statistically significant differences:

WaSC Region	Significantly different to...		
	Water services	Sewerage service	Surface water drainage
Wales	South West	South West	-
Midlands	-	-	Yorkshire
South West	Wales	Wales	Yorkshire
North West	-	-	Yorkshire
Yorkshire	-	-	Midlands, South West, North West

3.3 Satisfaction with retail services

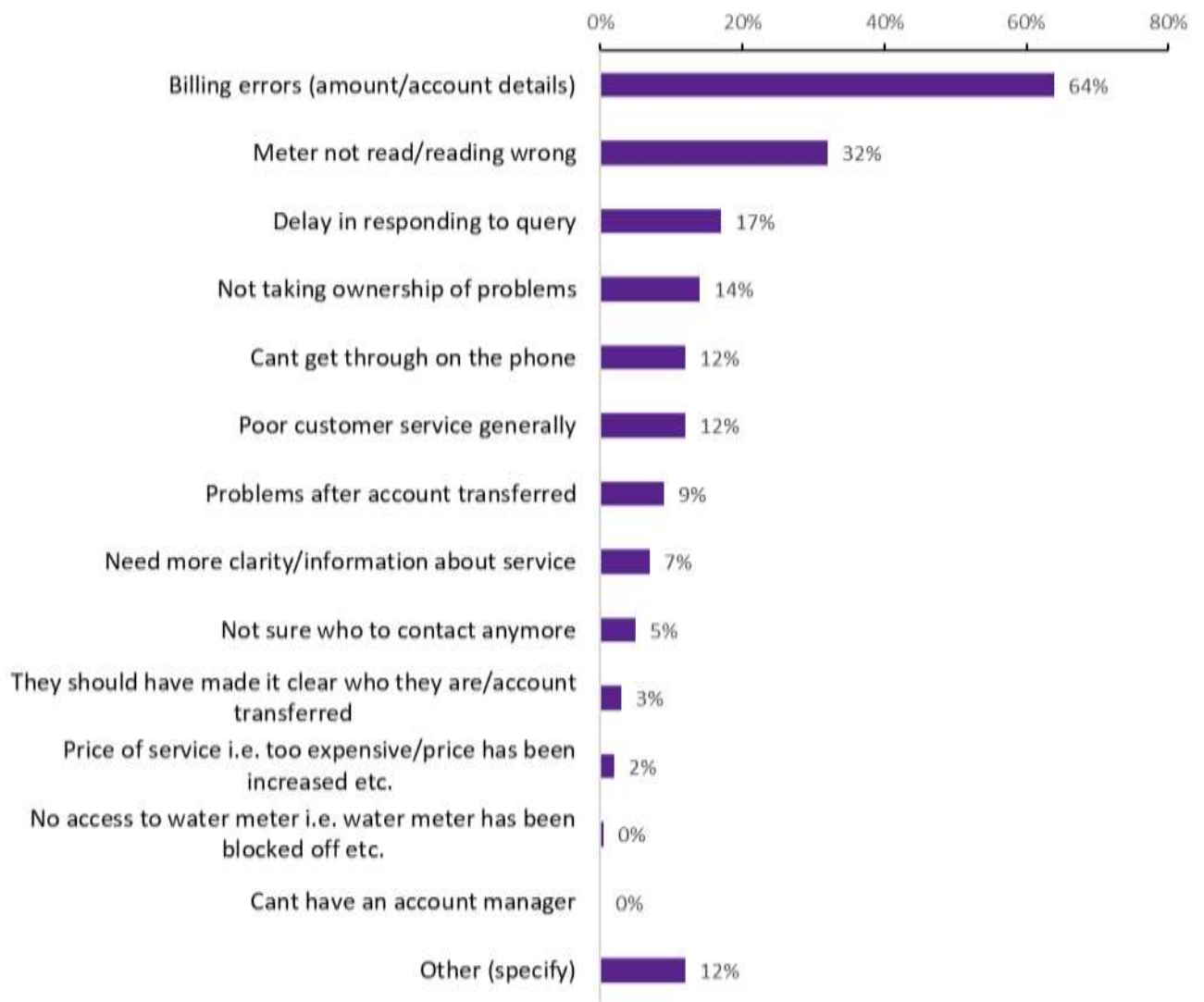
- 3.5 Since 2003, customers have been able to move water retail services – that is, the provision of customer service, billing and meter readings – to another provider in England and Wales. Access to the market in England was initially based on how much water a business used i.e. it had to be above a certain volume each year and used at a business premise that was billed directly by a water company (rather than a landlord or managing agent). However, the consumption requirement in England fell from 50 megalitres to 5 megalitres a year, and then was removed altogether in April 2017. Since then, approximately 1.2 million eligible business sites have been able to choose who provides their retail services. In Wales, businesses must still use more than 50 megalitres¹⁰ a year at a business premise to be eligible to choose which company provides their retail services.
- 3.6 The opening of the market fully in England meant that on 1 April 2017, the provision of retail services i.e. customer services, reading meters and billing was separated from the provision of the physical water and sewerage services. The accounts for all business customers with premises in England were transferred from the regional water and/or sewerage company to a default retail service provider. Water and sewerage services in England continued to be provided by the same regional water and/or sewerage companies as before. Because of the 50 megalitre consumption threshold, the majority of businesses with premises in Wales have not experienced any change in terms of who send their bills or provides customer services – they are still provided by the same regional water and/or sewerage company.
- 3.7 The questionnaire for Testing the Waters has been updated to reflect this market change which happened since the last survey in 2016. Where appropriate, it now includes questions about retail services and retail service providers to help understand current business customer experiences and enable comparisons with wholesale services i.e. water and sewerage services and with wholesale service providers.
- 3.8 This chapter presents the perceptions and experiences of retail services for business customers in England and comparative views from customers in Wales about their customer service, meter reading and billing (Figure 10). Figure 11 shows the causes of dissatisfaction. It then breaks these down by retailer category in Figure 12. Finally, it shows views on how clear bills are in terms of how much needs to be paid and when in Figure 13.

Figure 10: Satisfaction with customer service, meter reading and billing (retail services) for England and Wales



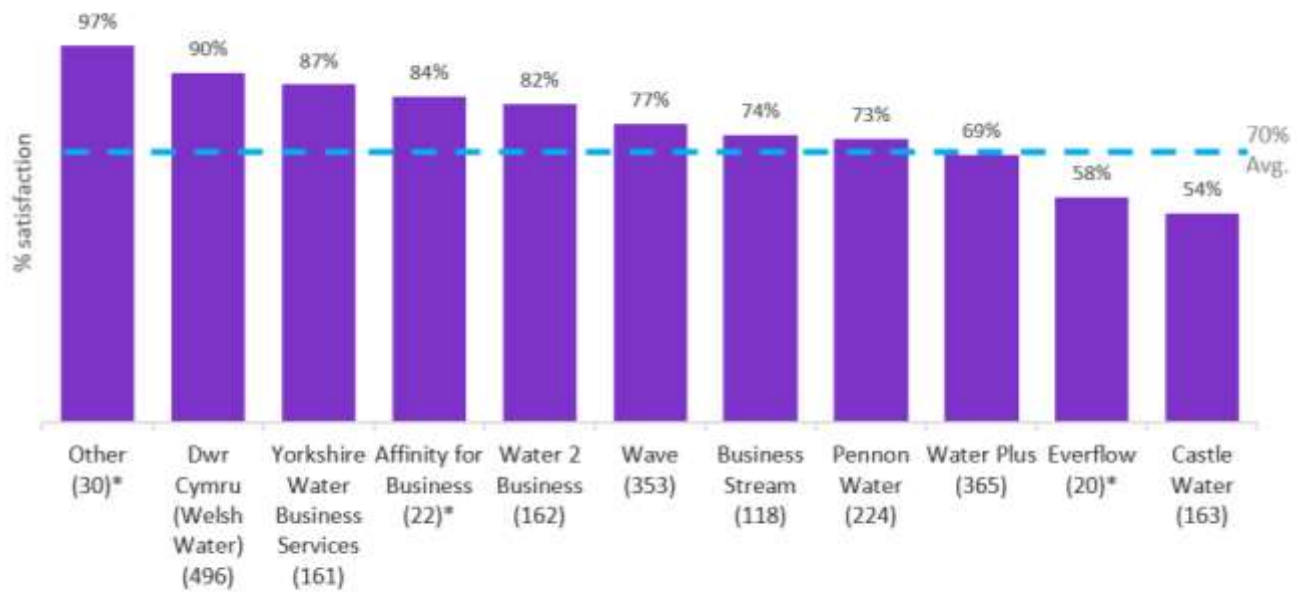
¹⁰ The equivalent of 50 million litres, or 50,000 cubic metres (m³)

Figure 11: Causes of dissatisfaction with customer service, meter reading and billing



% of participants who are dissatisfied with their retail services (269)

Figure 12: Satisfaction with customer service, meter reading and billing (retail services) by retailer¹¹



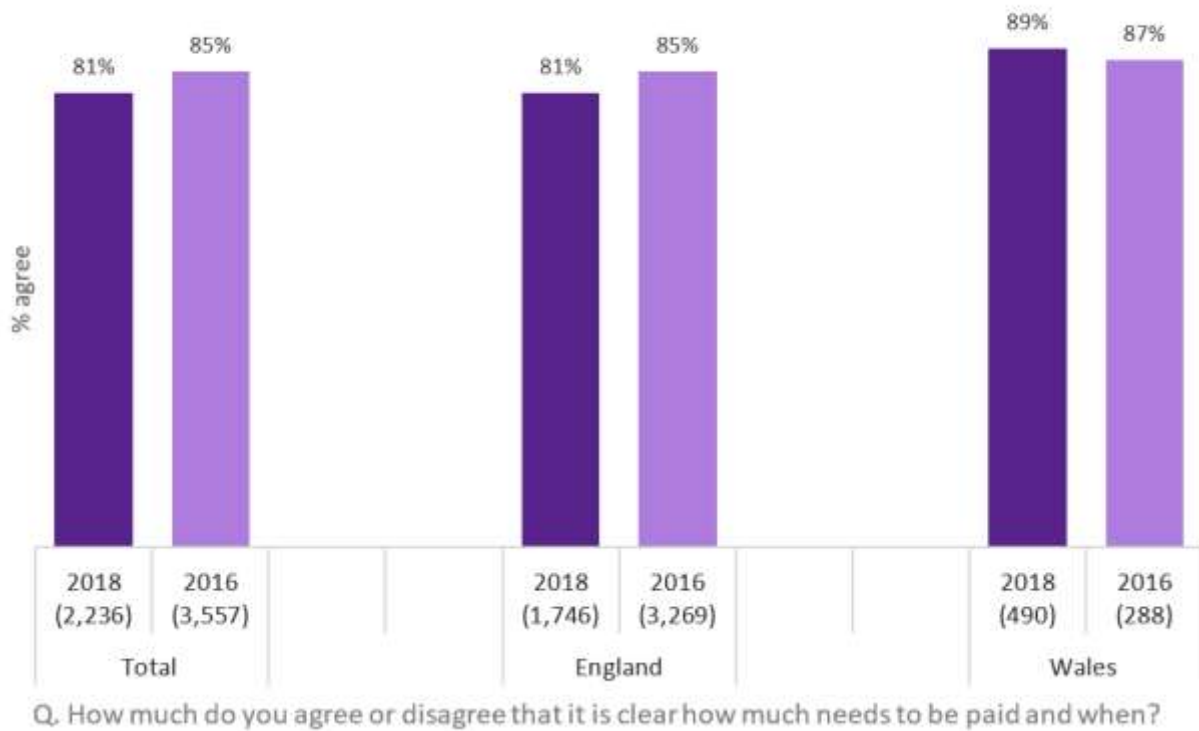
Q. How satisfied or dissatisfied are you with the overall customer service, meter reading and billing services you receive from this company?

* Low base size

¹¹ Retailer should also be taken to mean the water and/or sewerage company in Wales

Figure 13: Clarity of bill: how much needs to be paid and when for England and Wales

Clarity of bill



None of these differences are statistically significant

3.4 Relationship with wholesalers and retailers: customer views on care, trust and likelihood to recommend

- 3.9 This part of the report covers business customer perceptions of how much their service providers care about the services they provide, the level of trust they have in their service providers and their likelihood to recommend them to friends and family for those services. To keep the survey as straight forward as possible, questions on care, trust and likelihood to recommend were not asked for sewerage service providers – the focus was kept on water and retail services because our experience from previous research is that customer awareness of these services is generally better than for sewerage.
- 3.10 Figure 14 shows the proportion of respondents who knew who their wholesaler(s) and retailer were when asked. This question is of interest as all eligible businesses in England were transferred to a new service provider for retail services in April 2017, but their wholesale service provider has not changed.
- 3.11 Customers are asked to what extent they agree or disagree that the company which provides their water services and the company which provides retail services cares about the service it provides to them. Figure 15 shows customer perceptions of water and retail service provider care.
- 3.12 Figure 16 shows the extent to which customers trust the company that provides their water services and the company that provides retail services on a scale of 1 – 10, with 1 being ‘do not trust them at all’ and 10 being ‘trust them completely’. The same question was also asked about their energy supplier to see how it compares to the water industry.
- 3.13 Figure 17 shows how likely business customers would be to recommend the company that provides their business’s clean water services to friends and family, on a scale of 0 to 10 where 0 is not at all and 10 is extremely likely. The same question was asked about the company which provides their billing, meter reading and customer services.
- 3.14 Figure 18 shows likelihood to recommend water wholesaler by WaSC region and Figure 19 shows likelihood to recommend retailer.
- 3.15 Finally, Figure 20 shows what one improvement business customers would like to see to their services.

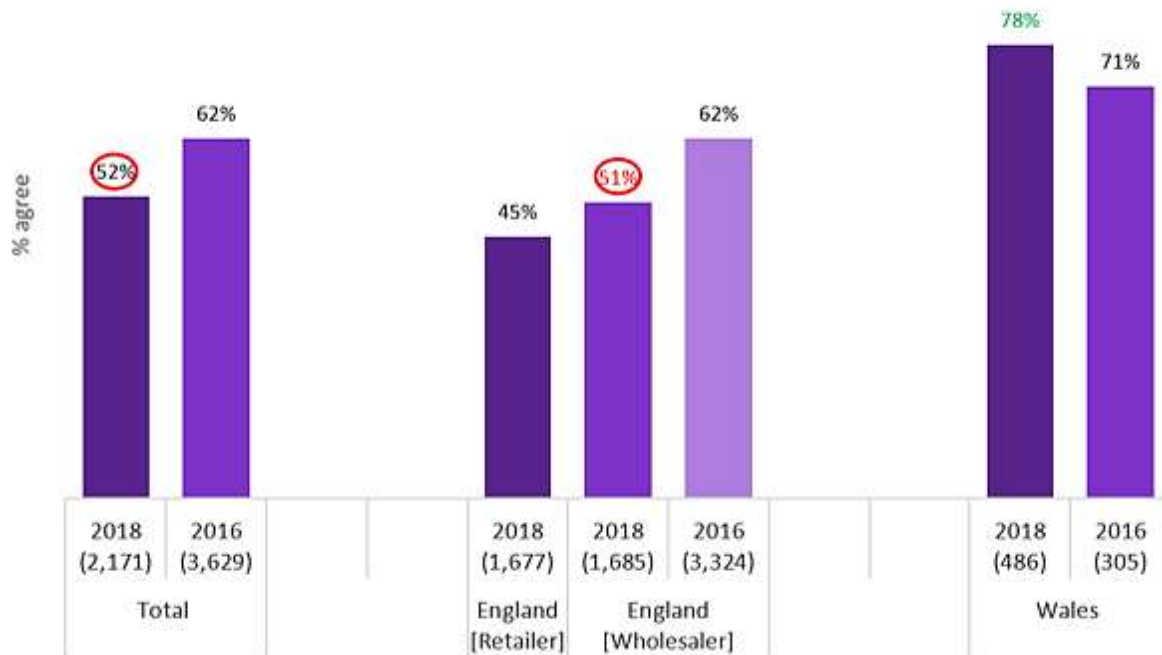
Figure 14: Proportion of respondents who knew who their wholesaler/retailer was when asked



Figure 15: Perceptions of wholesaler care for England and Wales

Information needs & Relationship:
Care

○ / ○ Denotes significant difference since 2016
% / % Denotes significant difference by subgroup



Q. How much do you agree or disagree that [wholesaler]/this company cares about the service it gives to business customers?

Base: All respondents

In 2016, respondents were asked whether they agreed or disagreed that their water and/or sewerage services supplier cared about the services it gives to business customers. In 2018, respondents in England were asked whether they agreed or disagreed that their water wholesaler and retailer (separately) cares about the services it gives to business customers. Customers in Wales were still asked about their supplier overall as its market differs from England. Therefore, the questions are not directly comparable between years, especially in England, because the service providers have changed due to a fundamental change to the market.

Figure 16: Trust in water, retailer and energy service provider for England and Wales

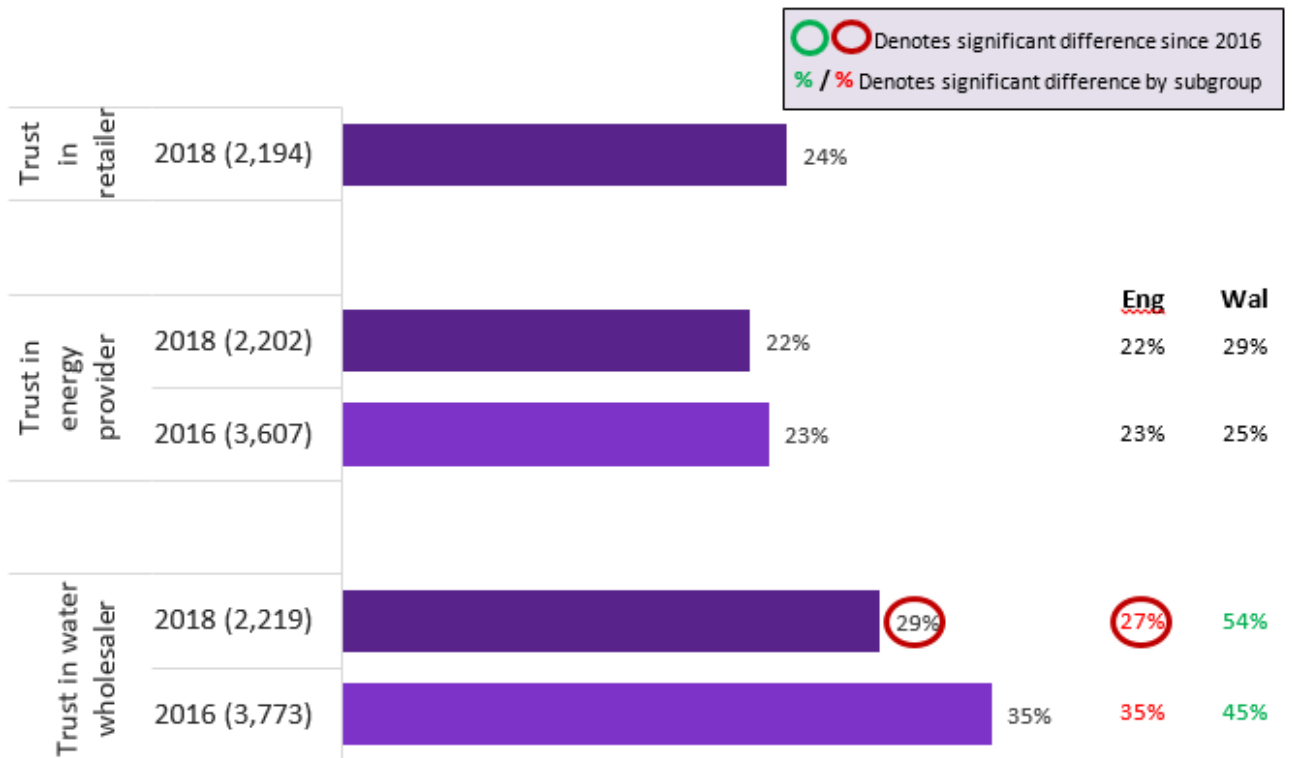
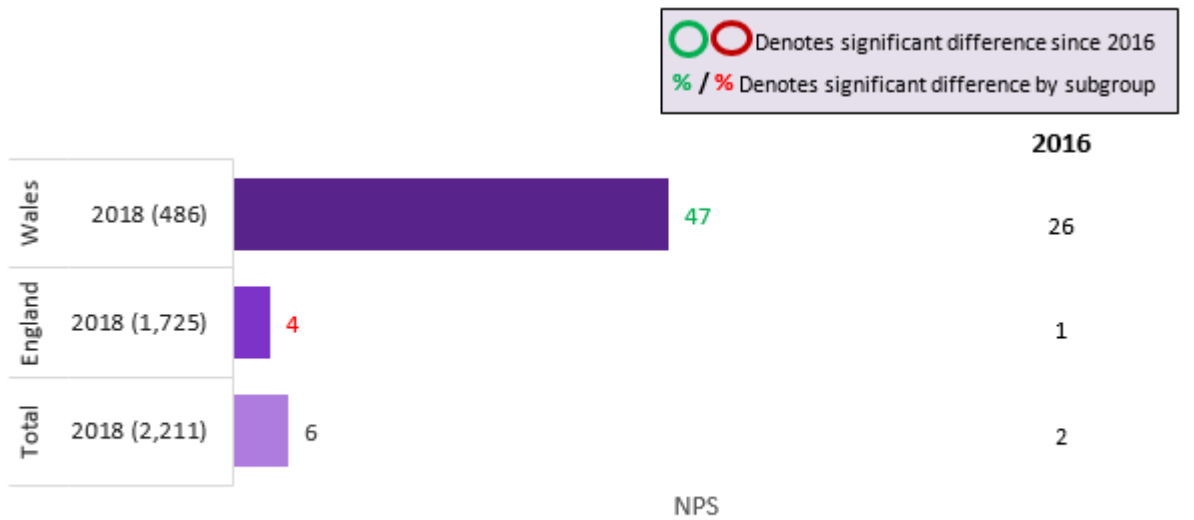


Figure 17: Likelihood to recommend wholesaler



Q. How likely would you be to recommend [the wholesaler] for the clean water supply services they provide?

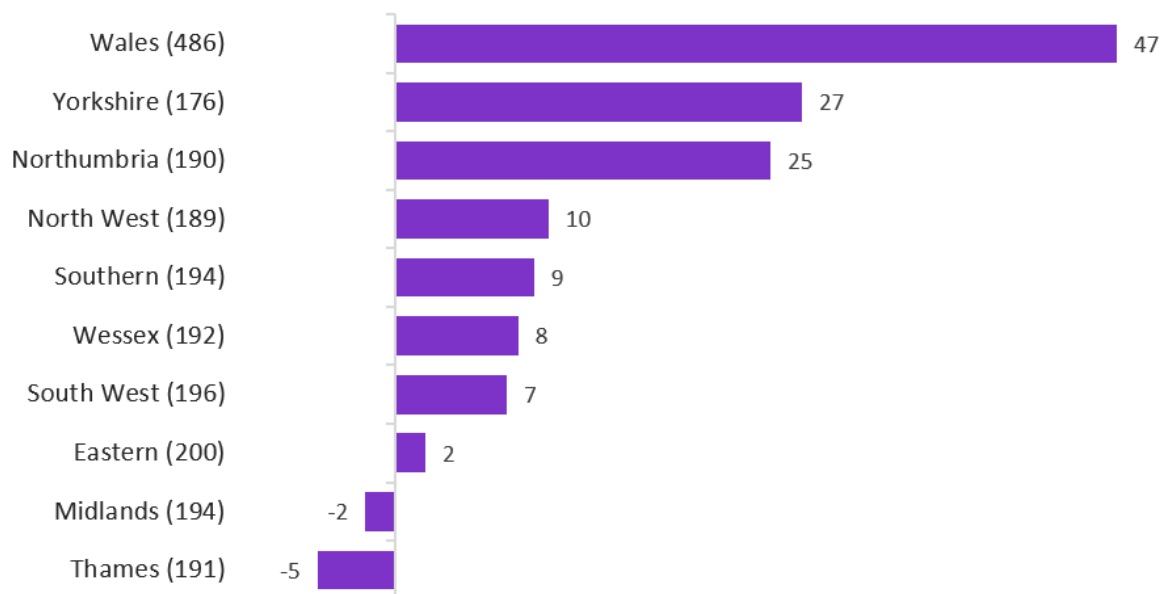
Base: All respondents

Net Promoter Score (NPS) segments respondents into three categories; those giving scores of 0 to 6 are classified as Detractors, scores of 7-8 as Passives and 9 or 10 as Promoters. The overall NPS is calculated by subtracting the proportion of Detractors from the proportion of Promoters. The higher the NPS score, the more positive customers are. Scores range from -100 to 100, and a negative score indicates a greater proportion of detractors than promoters.

In 2016, respondents were asked 'if 0 is not at all likely and 10 is extremely likely, how likely would you be to recommend Q01 as a water/water and sewerage supplier?'. In 2018, to take into account the fact that retail and wholesale services had split, respondents were given an explanation of the answer scale before being asked separate questions about their retail and wholesale services: 'Out of ten, how

likely would you be to recommend [the wholesaler] for the clean water?’ and ‘Out of ten, how likely would you be to recommend this company for the billing, meter reading and customer services they provide?’ For this reason, the questions are not directly comparable between years.

Figure 18: Likelihood to recommend water wholesaler by WaSC region



NPS by WaSC region

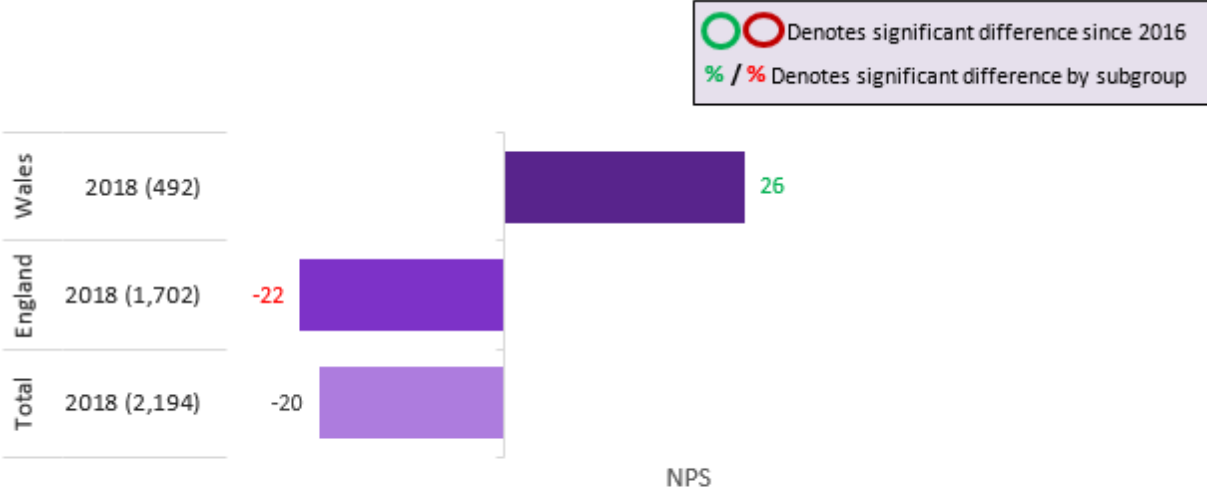
Q. How likely would you be to recommend [the wholesaler] for the clean water supply services they provide?

Base: All respondents

Statistically significant differences (referring to Figure 18):

WaSC Region	Significantly different to...
Wales	Eastern, Northumbria, Midlands, South West, Southern, Thames, North West, Wessex
Yorkshire	Eastern, Wales, Midlands, Thames
Northumbria	Eastern, Wales, Midlands, Thames
North West	Wales
Southern	Wales
Wessex	Wales
South West	Wales
Eastern	Wales, Northumbria, Yorkshire
Midlands	Wales, Northumbria, Yorkshire
Thames	Wales, Northumbria, Yorkshire

Figure 19: Likelihood to recommend retailer¹²

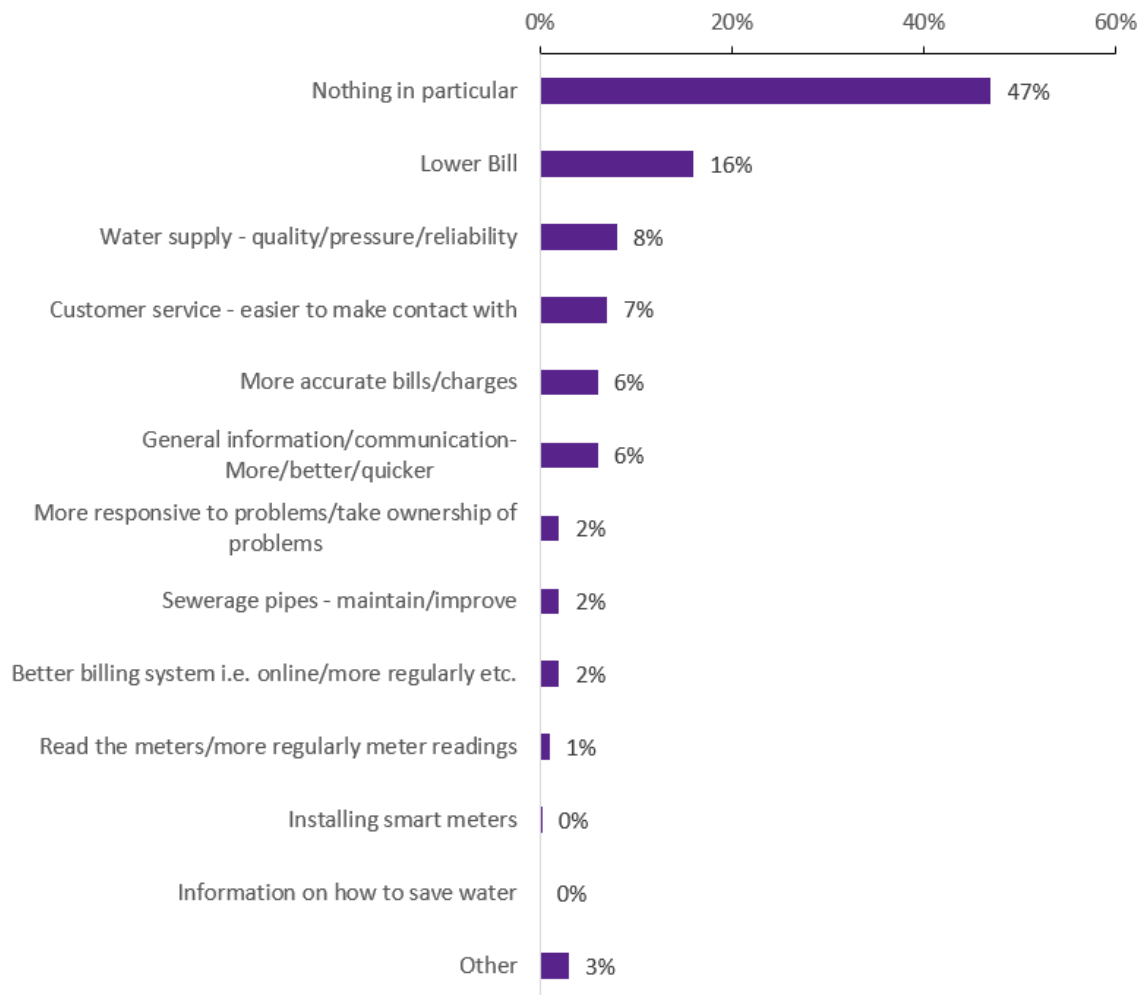


Q. How likely would you be to recommend this company for the billing, meter reading and customer services they provide?

Base: All respondents

¹² Retailer is taken to mean the water company in Wales

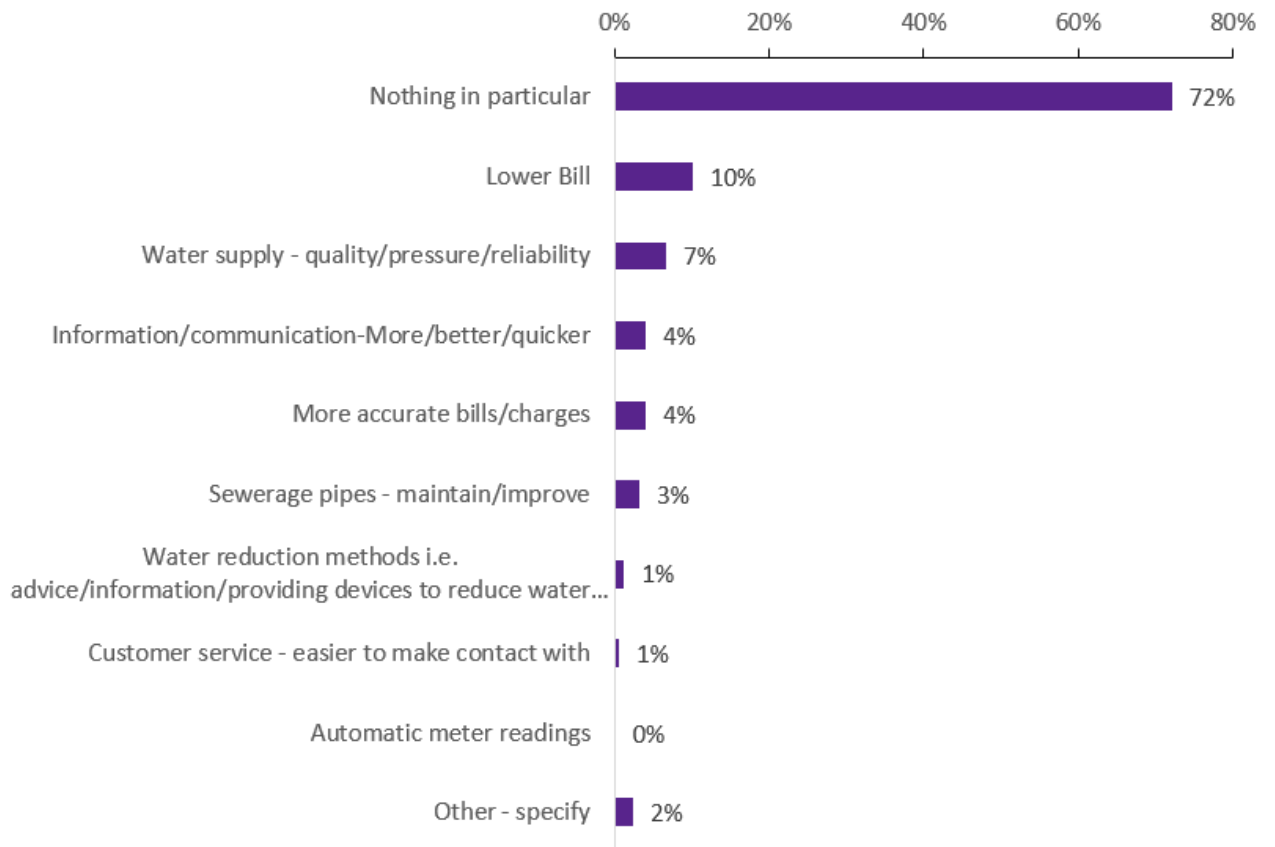
Figure 20: If there was one single improvement to your services (England)



Q. If you could make one single improvement to the overall service provided by your water and/or sewerage company what would it be?

Base: Respondents in England (1,658)

Figure 21: What, if any, improvements would help your business? (Wales)



Q. What, if any, improvements to your water, sewerage or customer services would help your business?

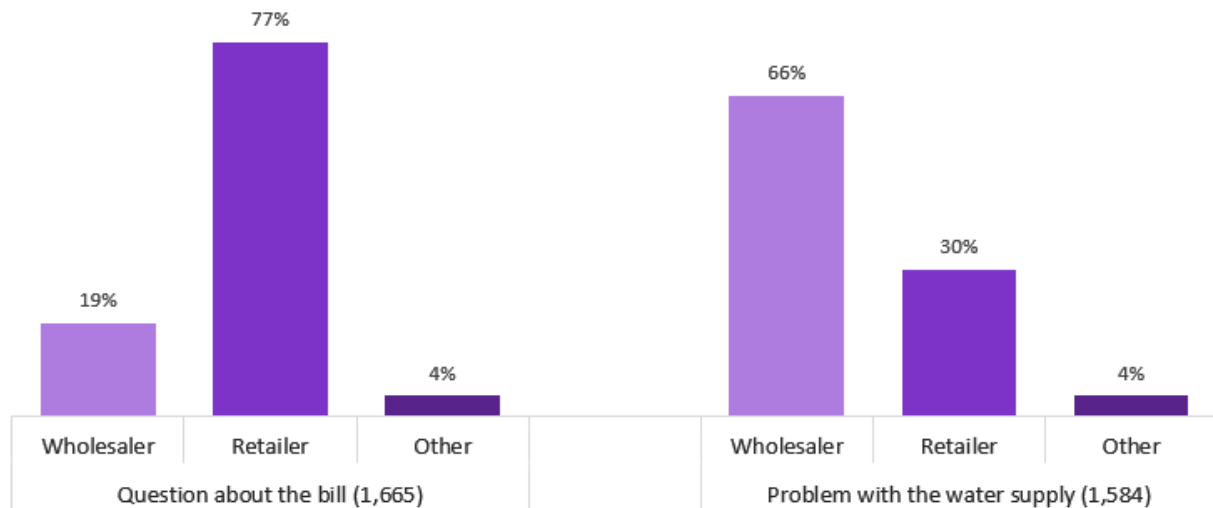
Base: Respondents in Wales (484)

3.5 Satisfaction with contact

- 3.16 The handling of customer contacts is a key element of the customer service provision from retail companies. The experience of contact handling can change the views that many customers have of their service provider.
- 3.17 Since April 2017, business customers in England should be contacting their retail service provider with any queries they have¹³ - including in the first instance those that are non-emergencies related to their water and sewerage services as well as billing. The retail service provider is responsible for referring queries about water and/or sewerage services to the relevant wholesaler for resolution when required. This is step change for many customers and relies on their understanding that their account has been transferred to a different company (the retailer) and of what their role is. Given the significant change in how contacts are managed in England, we wanted to find out how well business customers are navigating the new system for contacts, and how their experiences of contact handling compares with 2016. There has been no change for businesses in Wales which still contact the regional water company for billing and service queries.
- 3.18 To understand current awareness of contact handling processes we first asked customers in England who they would contact if they had a problem with their water supply, and who they would contact if they had a query with their bill. Findings are shown in Figure 22.
- 3.19 Figure 23 shows the proportion of businesses in this sample which have contacted their service provider with an enquiry or complaint since April 2017 and compares this to the rate of contact found in the 2016 survey.
- 3.20 Respondents in England were then asked to identify which of their service providers they had contacted, to establish whether it was the retailer or water/sewerage service provider. This is shown in Figure 24.
- 3.21 Where a customer in England indicated they had contacted their wholesaler, they were asked if their query was referred onwards or whether the wholesaler dealt with it. This is shown in Figure 25.
- 3.22 Figure 26 shows overall satisfaction with contact handling split out by whether it was dealt with by the wholesaler, a retailer and by each category of retailer.
- 3.23 Figure 27 shows the nature of the queries raised by customers in England and in Wales in 2018, compared with 2016.
- 3.24 Figure 28 shows satisfaction with aspects of contact handling compared for 2016 and 2018 for the total sample and for England and Wales.
- 3.25 Figure 29 shows overall satisfaction with contact handling and changes since 2016 at national levels.
- 3.26 Finally, Figure 30 shows overall satisfaction with contact handling by retailer.

¹³ Pragmatically there may be exceptions to this in the case of operational emergencies or large-scale incidents where customer contacts go to the wholesaler – these would be the exception rather than the norm.

Figure 22: Who would you contact if you had a problem with your water supply or a problem your bill? (England only)

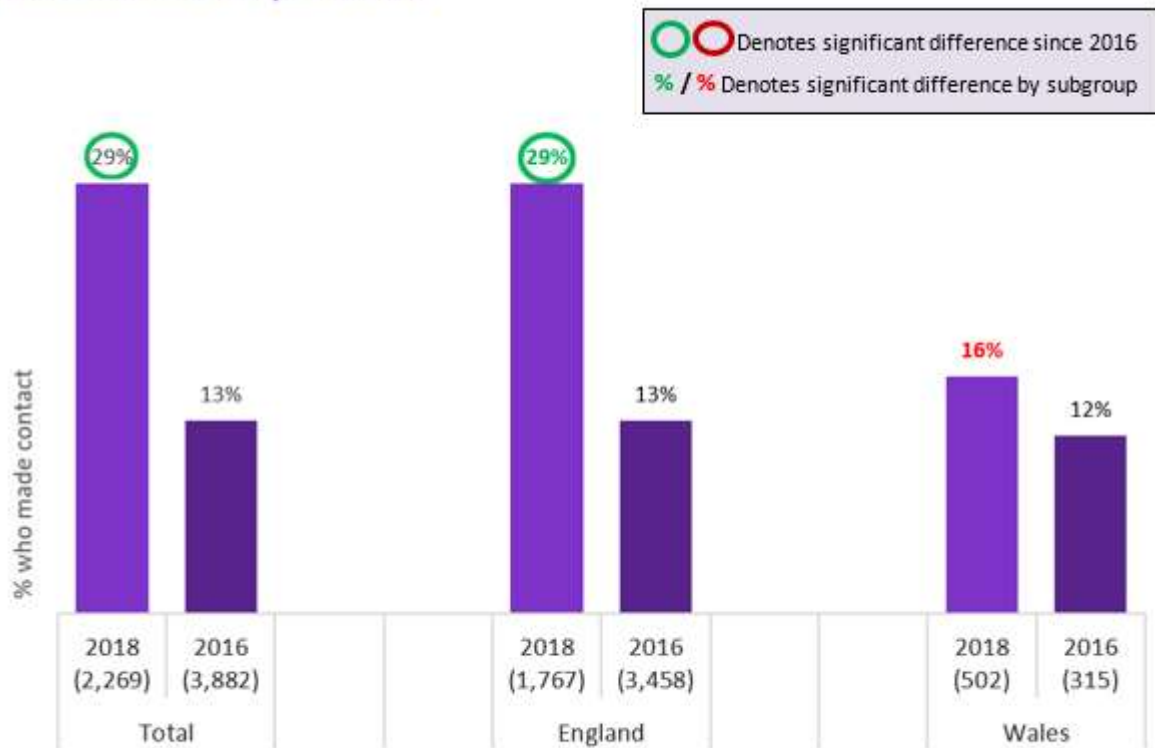


Q. Who would you contact to report a problem with the water supply/if you had a question about the bill?

Base: All respondents in England

Figure 23: Prevalence of contact since April 2017 in England and Wales

Contact since April 2017



Q. Since April 1st 2017, have you contacted your service provider with an enquiry or complaint?

Base: All respondents

The significant increase in contact should be interpreted with caution. In 2016, respondents were asked 'Have you contacted your water and/or sewerage company to make an enquiry or complaint in the past 12 months?' In 2018, the question was asked about contact since 1 April 2017, a period of around 16 months. The rate of contact in 2018 had doubled across England and Wales, which does suggest a meaningful increase in contact levels since the 2016 survey, although as the period of time differed in 2018, differences between years are not directly comparable.

Figure 24: Which of your service providers did you contact – wholesaler or retailer? (England only)

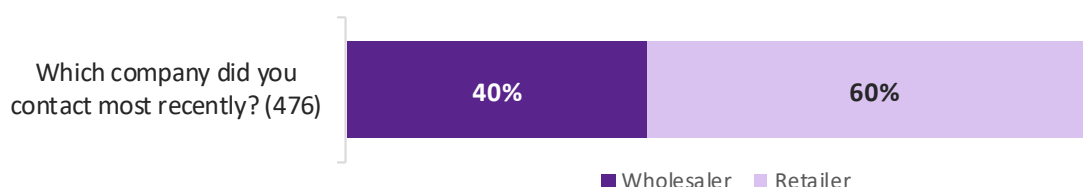


Figure 25: Did your wholesaler deal with your query or refer you/your query to your retailer? (England only)

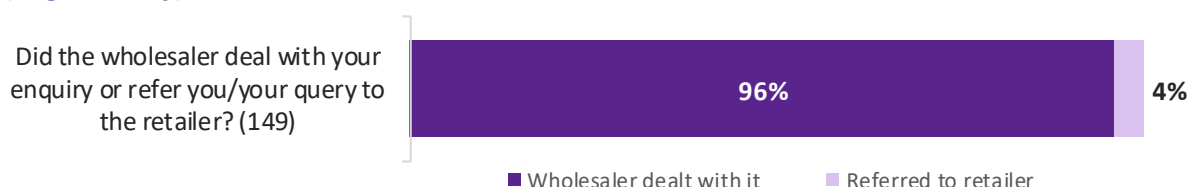
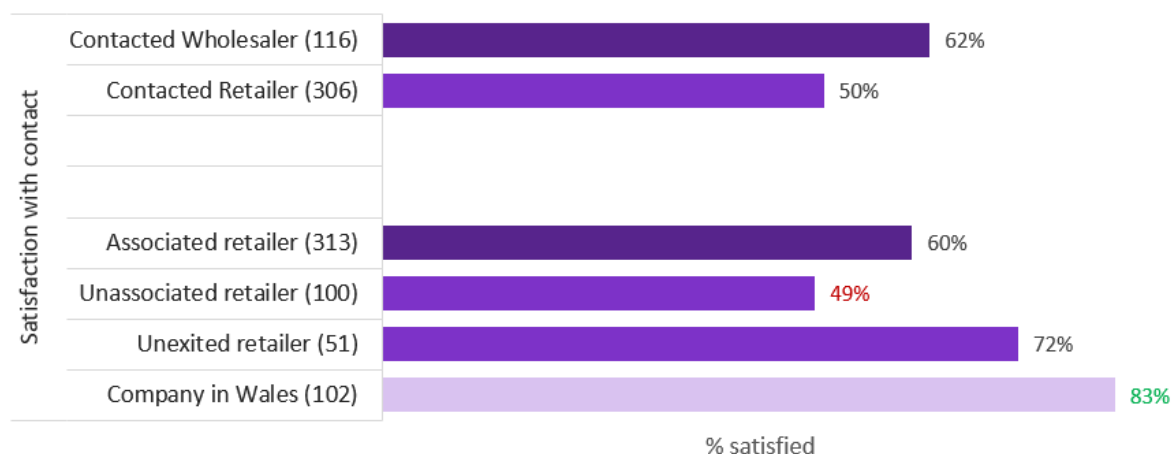


Figure 26: Satisfaction with contact by whether the wholesaler or the retailer dealt with the query and by category of retailer¹⁴



¹⁴Different types of retailers were grouped into categories for this analysis:

- Associated retailers operate at arms-length as a separate legal entity from the water company (i.e. wholesaler) from which it was spun off as at April 2017. All eligible NHH customers of associated water companies were formally exited to associated retailers.
- Un-associated retailers are those that had no affiliation to an existing water company (i.e. wholesaler) operating as at April 2017. Two un-associated retailers purchased the NHH customer book from existing water companies. Other un-associated retailers started from zero customers.
- Un-exited retailers operate at arms-length, but not as a separate legal entity from the water company (i.e. Wholesaler) as at April 2017. Eligible NHH customers of the water company were not formally exited but started to be served by the company's retail arm.

Retailers who were new entrants into the market which started with zero customers were excluded from this chart due to a low base size (7).

Figure 27: Main reasons for contact in England and in Wales

Contact: Reasons for customer contact?

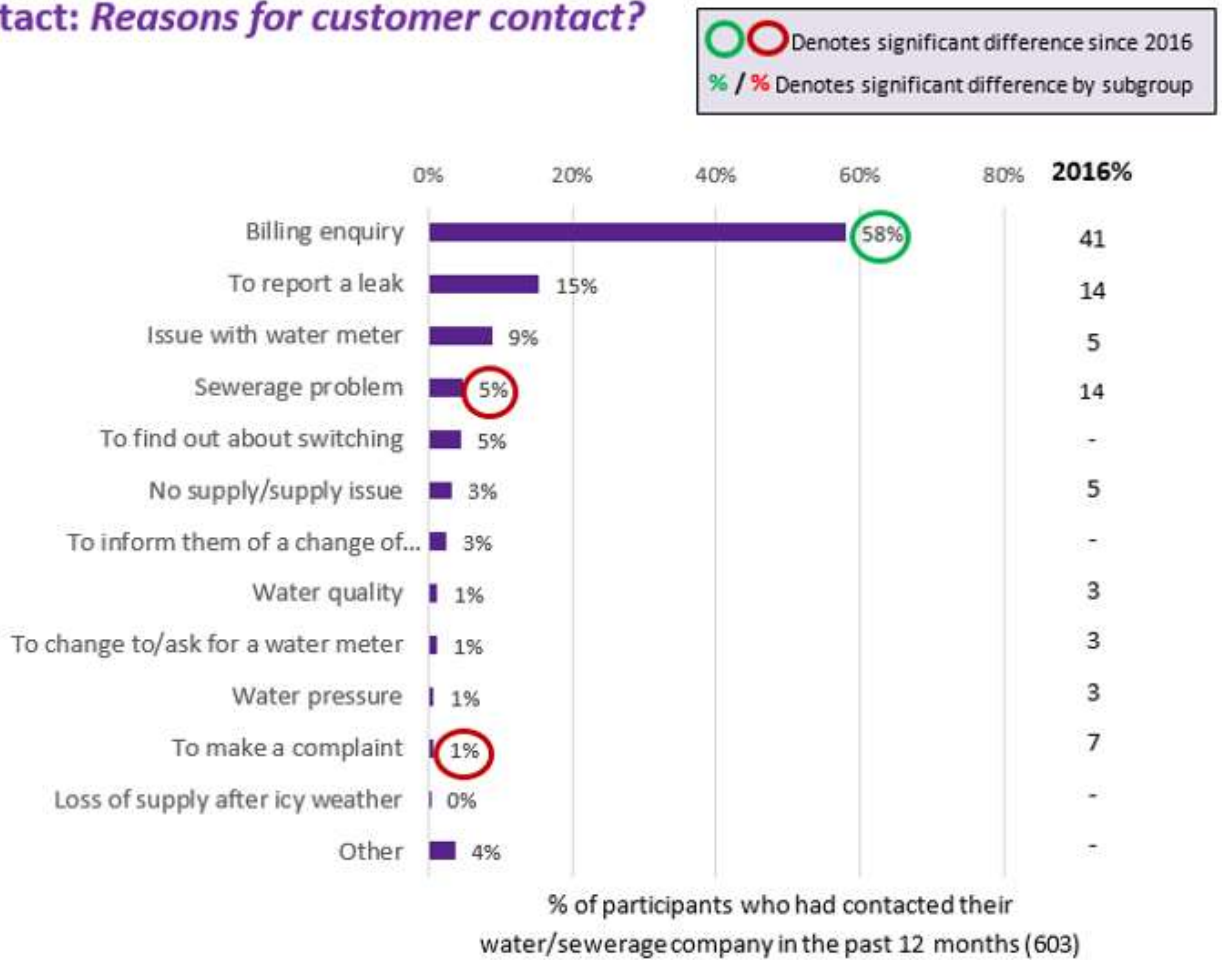


Figure 28: Satisfaction with aspects of contact handling in England and in Wales

Satisfaction with Contact:

Perceptions of individual aspects of contact

○ ○ Denotes significant difference since 2016
% / % Denotes significant difference by subgroup

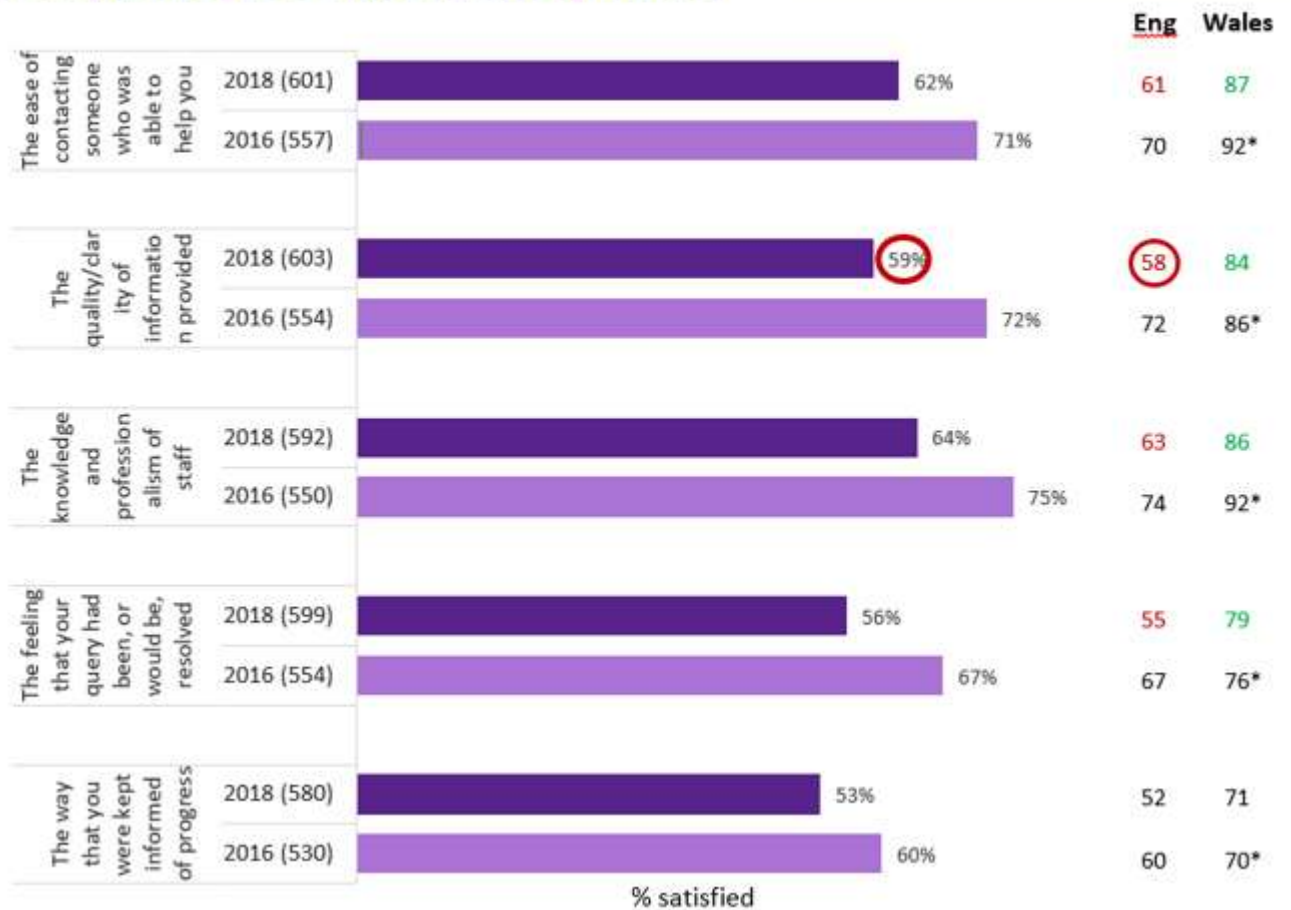
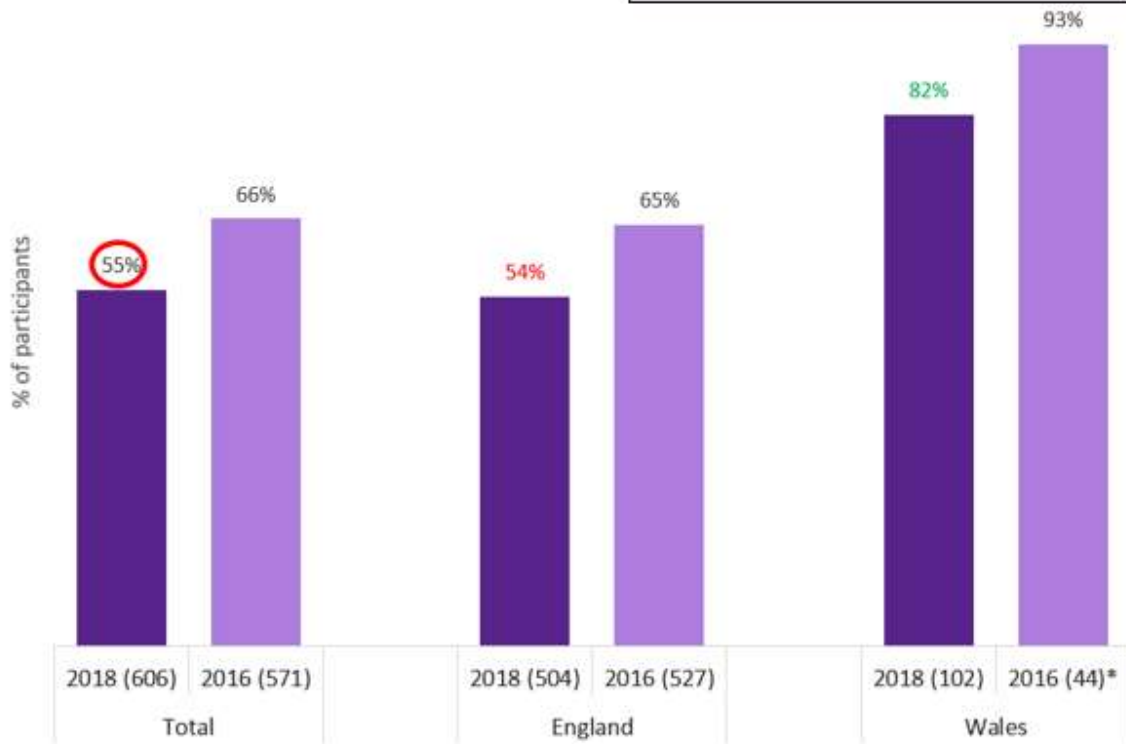


Figure 29: Satisfaction with overall contact in England and in Wales

Satisfaction with contact

○ Denotes significant difference since 2016
 % / % Denotes significant difference by subgroup

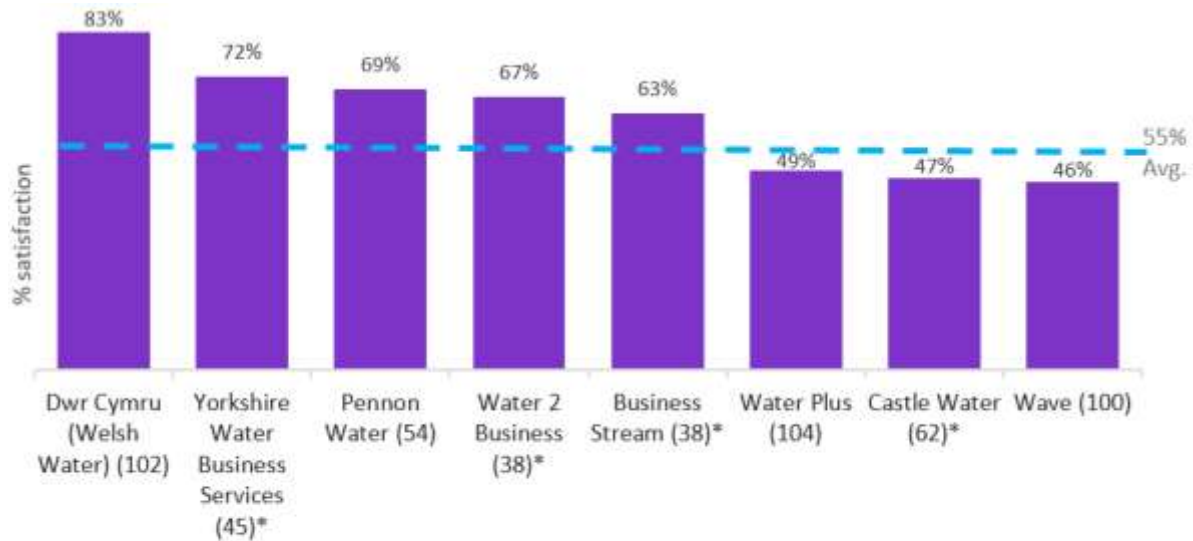


*Low base size

Q. Overall how satisfied or dissatisfied were you with the contact with this company

Base: All who contacted their provider in the last 12 months

Figure 30: Overall satisfaction with contact handling by retailer



Q. Overall how satisfied or dissatisfied were you with the contact with this company

Base: All who contacted their provider in the last 12 months

Retailers with very low base sizes have been excluded from this chart.

3.6 Awareness and engagement in the retail market

- 3.27 Since 2003, customers have been able to move water retail services— that is, the provision of customer service, billing and meter readings – to another provider in England and Wales. Access to the market in England was initially based on how much water a business used i.e. it had to be above a certain volume each year and used at a business premise that was billed directly by a water company (rather than a landlord or managing agent). However, the consumption requirement in England fell from 50 megalitres to 5 megalitres and then was removed altogether in April 2017. Since then, approximately 1.2 million eligible business sites have been able to choose who provides their retail services. In Wales, businesses must still use more than 50 megalitres a year at a business premise to be eligible to choose which company provides their retail services.
- 3.28 The opening of the market fully in England meant that on 1 April 2017, the provision of retail services i.e. customer services, reading meters and billing was separated from the provision of the physical water and sewerage services. The accounts for all business customers with premises in England were transferred from the regional water and/or sewerage company to a default retail service provider. Water and sewerage services in England continued to be provided by the same regional water and/or sewerage companies as before. Because of the 50 megalitre consumption threshold, the majority of businesses with premises in Wales have not experienced any change in terms of who send their bills or provides customer services – they are still provided by the same regional water and/or sewerage company.
- 3.29 Figure 31 shows whether or not businesses in England think it possible to switch or renegotiate a better deal for water, energy and telecoms services.
- 3.30 Figure 32 shows awareness of the market before this survey in England and in Wales once more information – a high level statement explaining what the market is and when it opened – is provided.
- 3.31 Businesses which said they knew about the market in England before this survey were asked how they had engaged with the market since becoming aware. This is shown in Figure 33.
- 3.32 Those that had switched were asked how satisfied they were with the process, and where dissatisfied, why this was. This is shown in Figures 34 and 35.
- 3.33 Figure 36 show the reasons why businesses had not switched or renegotiated since becoming aware of the market.
- 3.34 Businesses were asked what percentage level of saving off their bill would motivate them to switch, or if they would not switch for any saving, or if they would only switch for better service rather than on price. This is shown in Figure 37, which also makes comparisons with views in 2016 before market opening.
- 3.35 Finally, as shown in Figure 38, businesses were asked how likely they were to engage in the market in the next six months.

Figure 31: Is it possible or not to switch or renegotiate in the following utilities (England only)

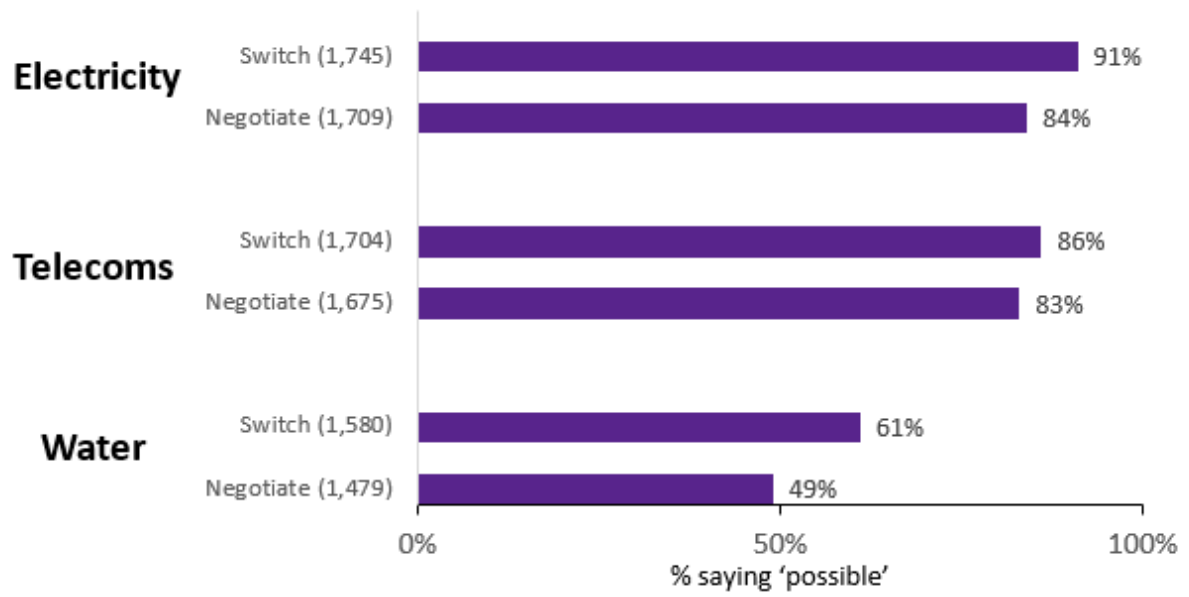
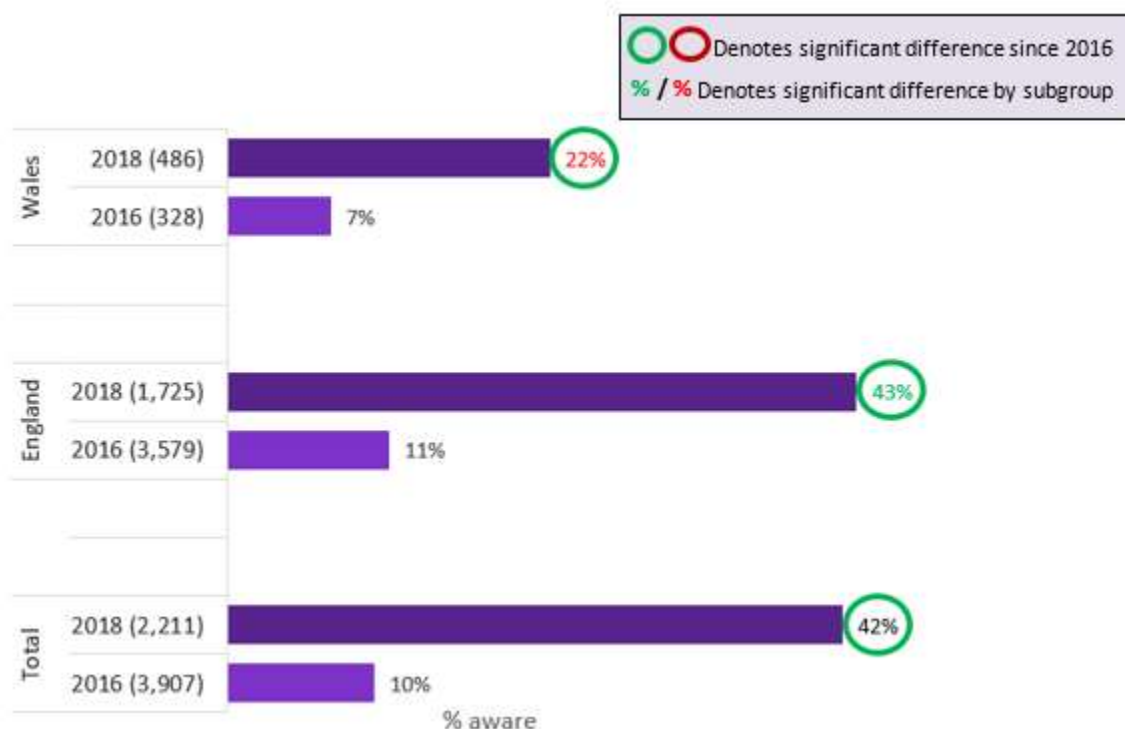


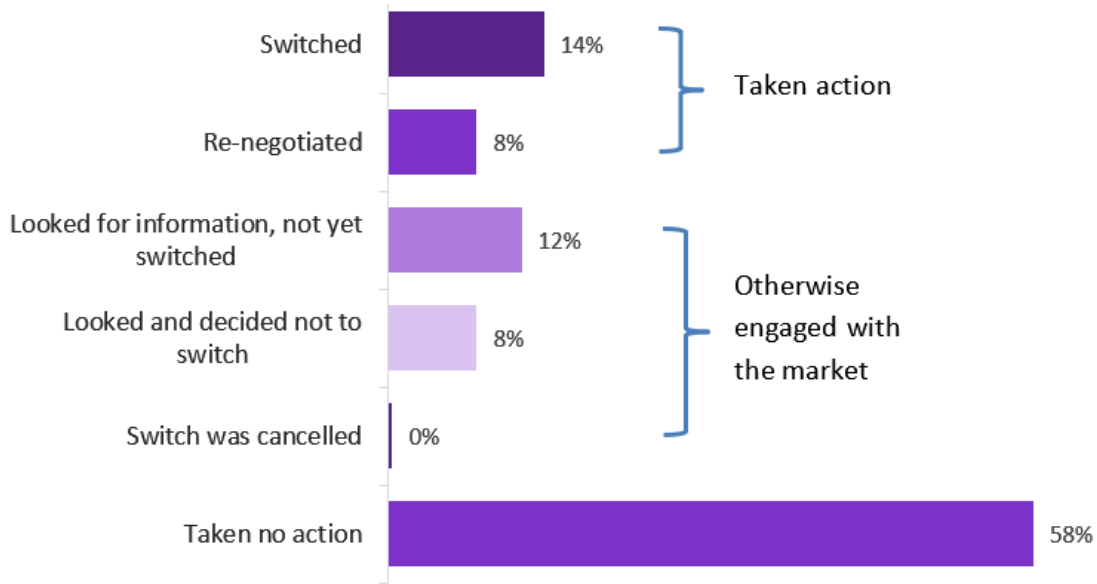
Figure 32: Following the provision of a high-level explanation of the market in England and in Wales, all respondents were asked if they were aware of the market before this survey¹⁵



¹⁵Due to the differences in the retail water market between England and Wales, organisations based in English water regions were given a different explanation of the market opening to those in Wales. In England, respondents were asked ‘*Since April 2017, businesses, charities and public sector organisations in England have been able to change the company providing their water and sewerage retail services (as they are able to with energy), or negotiate a better deal with their existing service provider. Retail service providers bill your business for water and sewerage services, provide customer services and read any water meters at this site. Were you aware of this change prior to this survey?*’, while in Wales, respondents were asked ‘*In Wales, businesses which use more than 50,000 cubic metres of water a year can switch their retail service provider like they can in energy. Retail service providers bill your business for water and sewerage services, provide customer services and read any water meters at this site. Were you aware of this prior to this survey?*’.

In 2016, respondents were asked ‘*From 2017, all businesses in England will be able to choose who provides them with retail services - that is, the company which provides customer service, reads the meter and bills them for water and sewerage services. Please note that this does not affect the water supply which would still come from the same company as now. Now that you have a bit more information, have you heard about this before?*’, and so differences between 2016 and 2018 are not directly comparable.

Figure 33: What have businesses which were aware of the market before taking this survey done in response? (England only)



Q. Since hearing about this has your organisation...

Base: All respondents in England who were aware of market opening (1154)

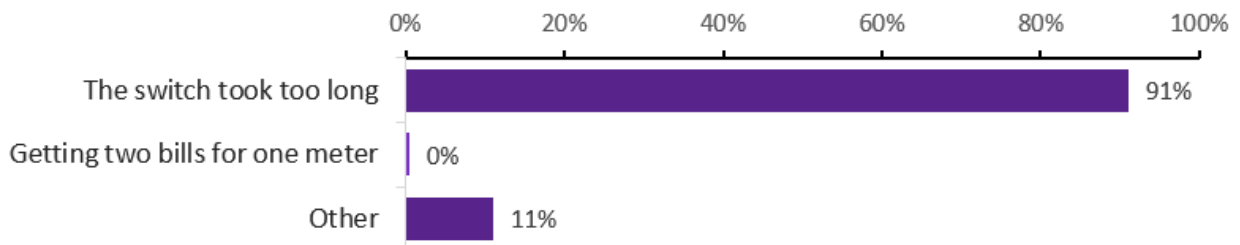
Figure 34: Satisfaction with switching process and reasons why dissatisfied (England only)



Q. Overall, how satisfied or dissatisfied were you with the switching process?

Base: All respondents who switched (91)

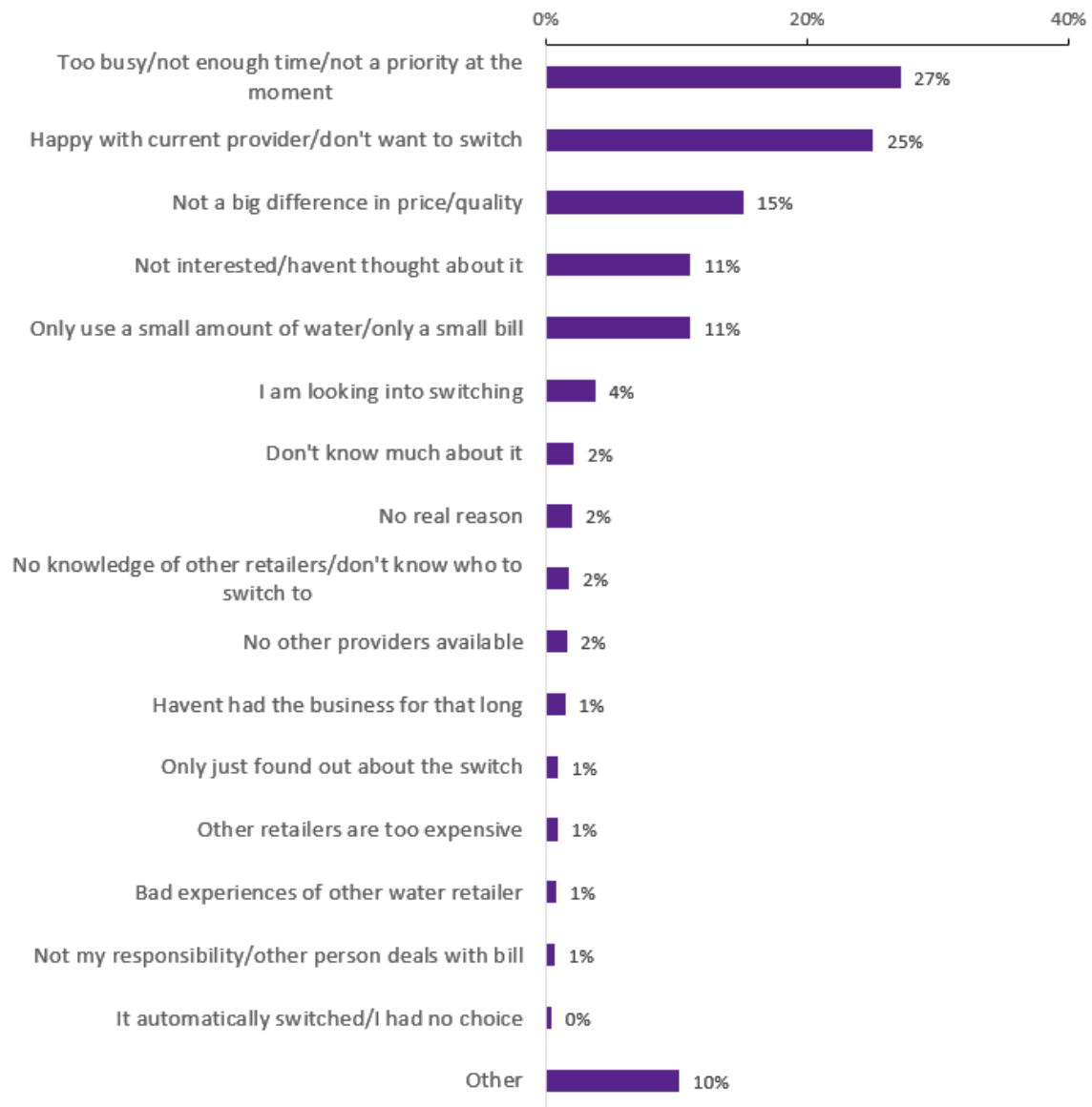
Figure 35: Reasons for dissatisfaction with the switching process (England only)



Q. Why were you dissatisfied?

Base: All respondents who were dissatisfied with the switch (11)*
*Low base size

Figure 36: Reasons why businesses have decided not to switch or renegotiate (England only)



Q. Why, have you not switched or renegotiated?

Base: All respondents in England who did not switch (570)

Figure 37: Percentage level of saving required to switch (England only)

Market reform

% would switch for

○ ○ Denotes significant difference since 2016
 % / % Denotes significant difference by subgroup

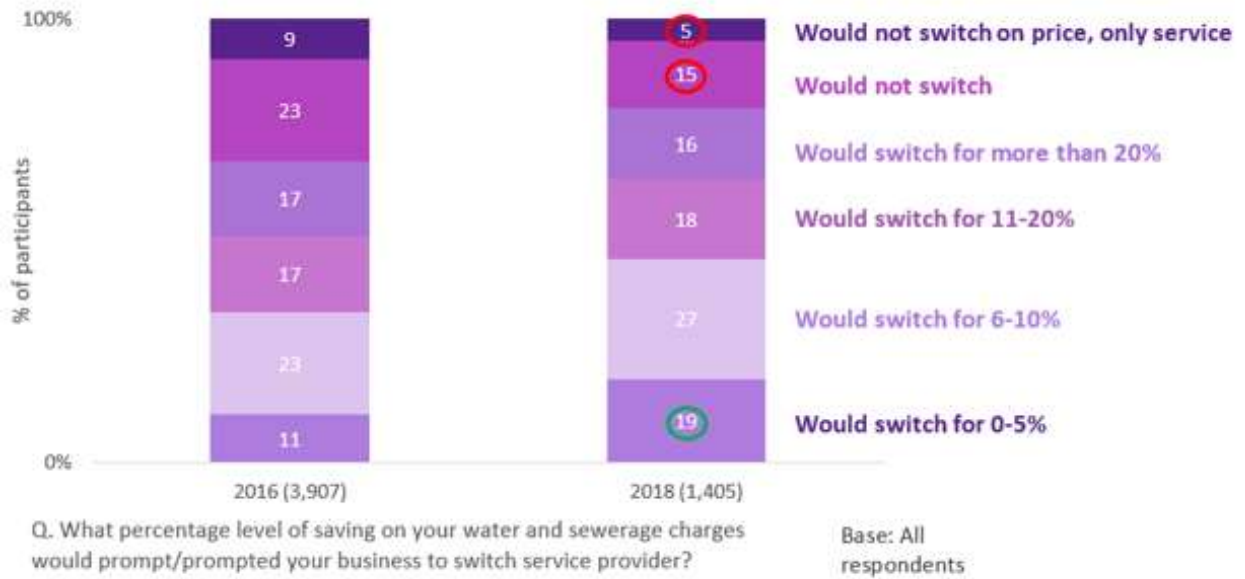
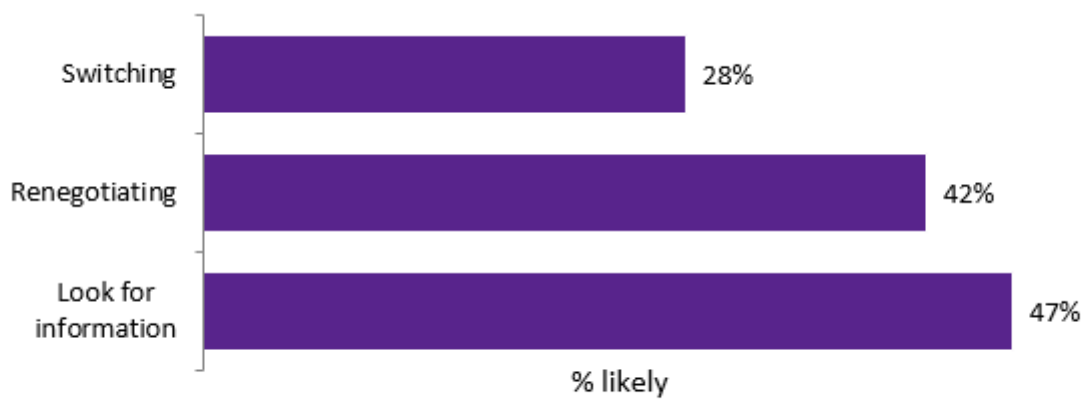


Figure 38: Likelihood of engaging in the market in the next six months (England only)



Q. How likely or unlikely is your organisation to do each of the following in the next 6 months...

Base: All respondents in England (1725)

3.7 Views by business size

3.36 This chapter summarises the key significant differences in customer views by business size based on the number of employees. Micro organisations constitute 0-9 employees, Small organisations 10-49 employees, Medium organisations 50-249 employees and Large organisations 250+ employees.

Figure 39: Overall satisfaction summary by business size

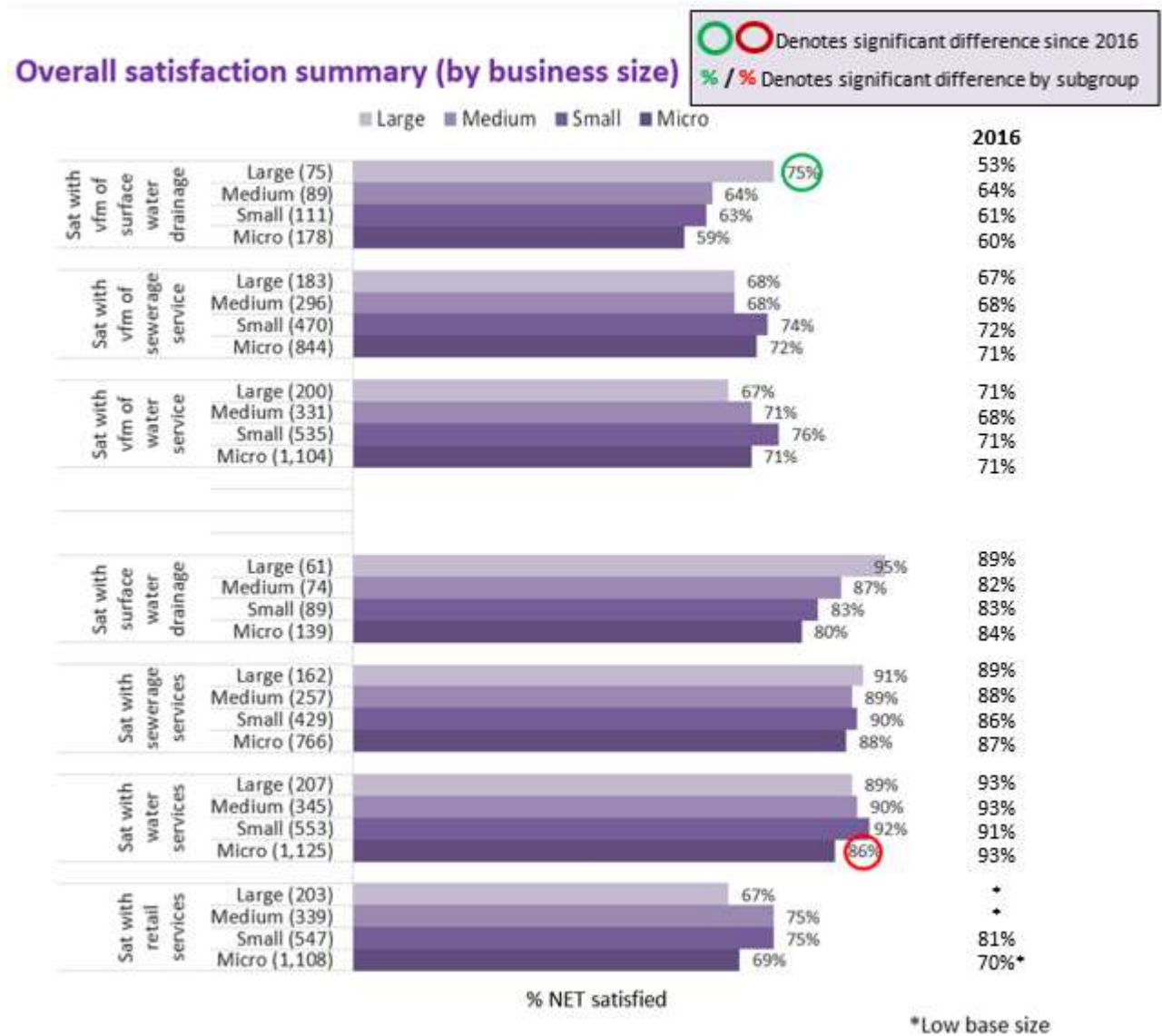


Figure 40: Views on care, trust and likelihood to recommend by business size (England and Wales)

Views on trust and care (by business size)

○ Denotes significant difference since 2016
% / % Denotes significant difference by subgroup

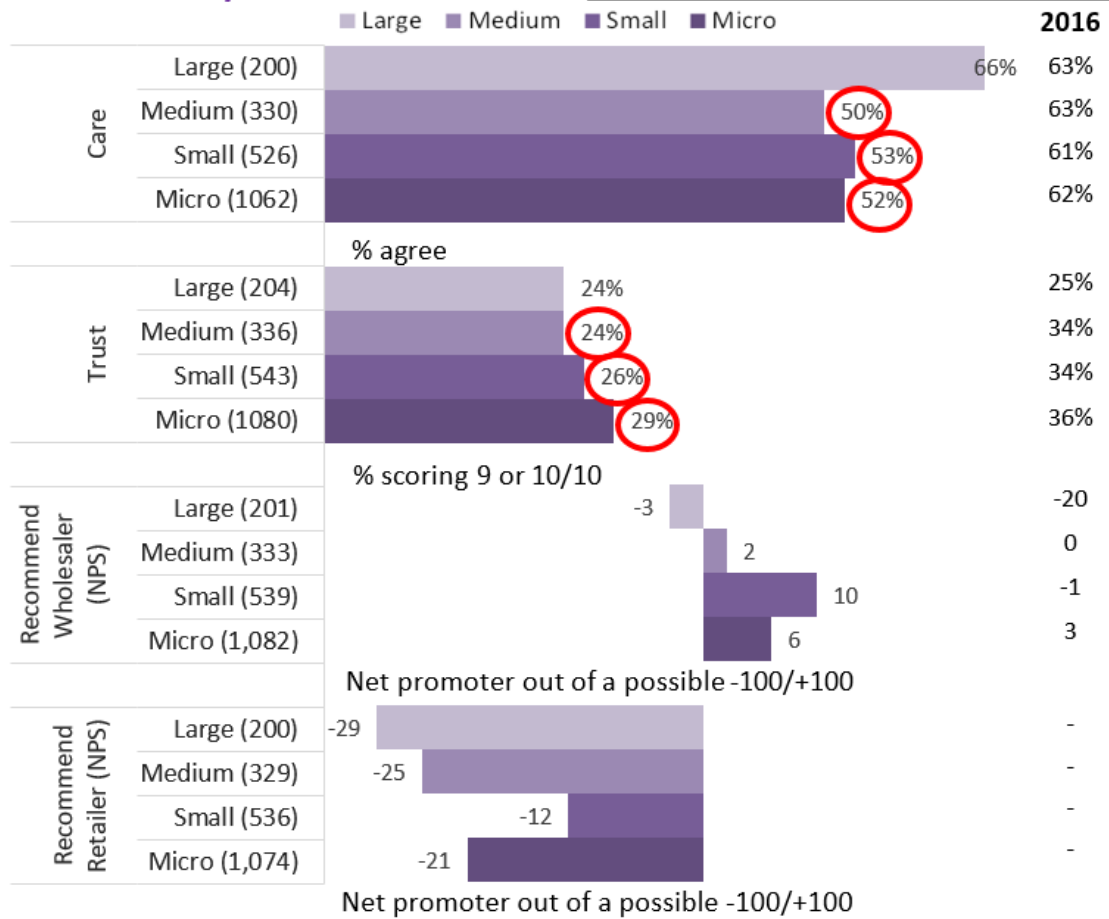


Figure 41: Contact summary by business size

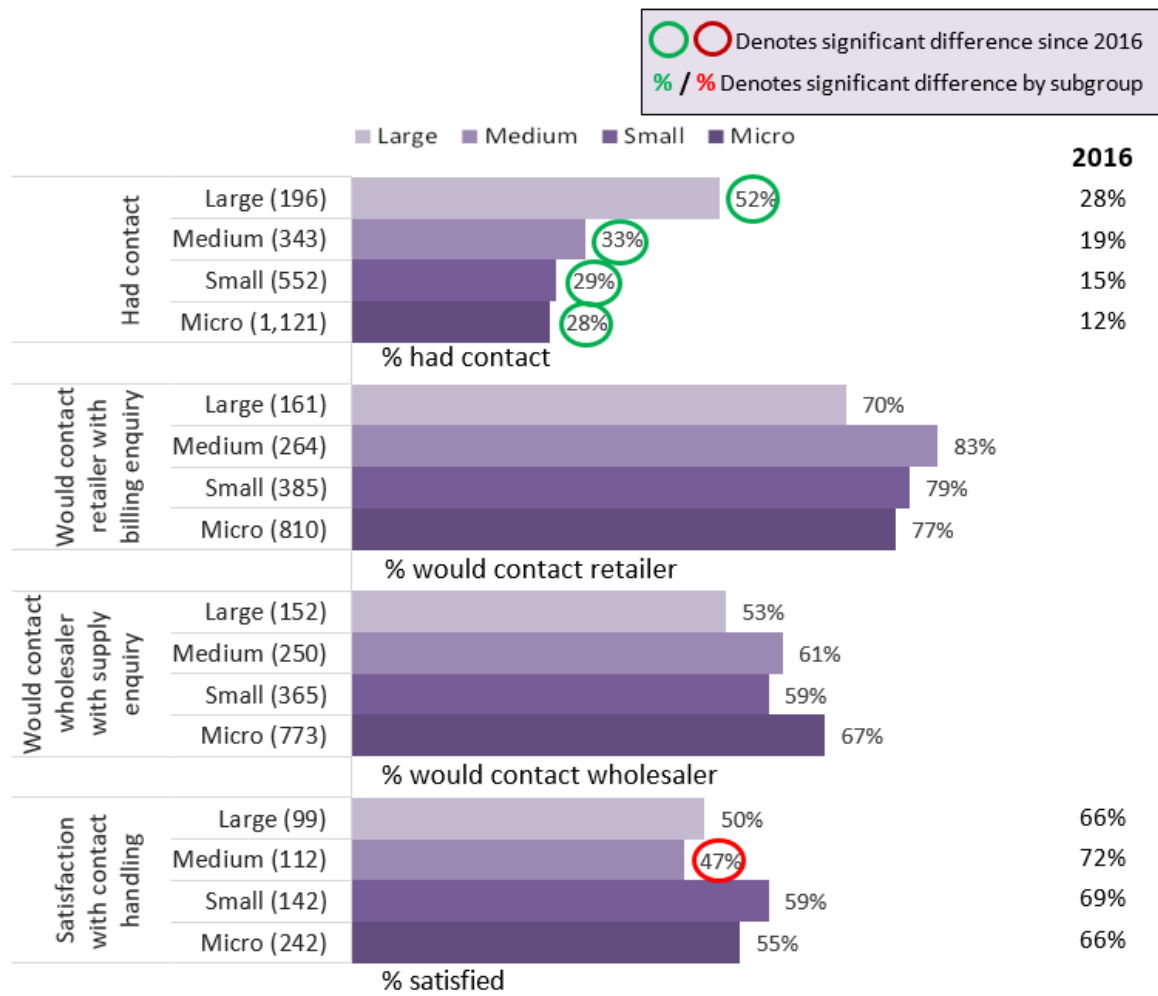


Figure 42: Awareness of the market in England and Wales, and likelihood to engage in the next six months by business size in England

Awareness of market reform and likelihood to switch supplier or renegotiate by business size

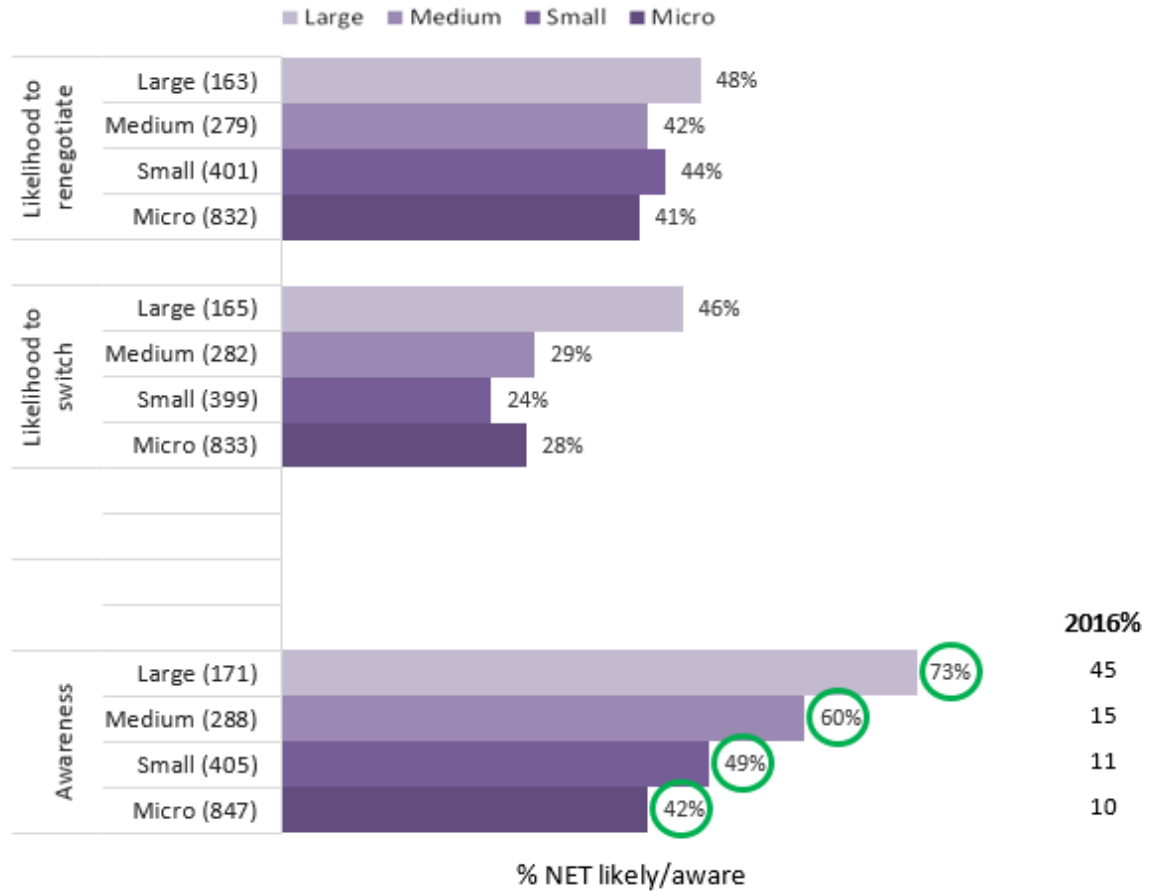


Figure 43: Percentage level of bill saving in order to switch by business size

	Large 250+	Medium B 100-249	Medium A 50-99	Small 10-49	Micro 0-9
>20%	15%	15%	12%	9%	17%
11%-20%	11%	8%	29%	20%	18%
6%-10%	27%	30%	23%	35%	25%
0%-5%	34%	39%	27%	23%	18%
Would not switch	8%	6%	5%	8%	17%
Would switch for service but not price	5%	2%	4%	5%	5%

Base: 1405

Figure 44: Actions to reduce water consumption, by size of company

	Large 250+	Medium B 100-249	Medium A 50-99	Small 10-49	Micro 0-9
Nothing	34%	58%	58%	68%	73%
Hippo/Save A Flush device in toilet cisterns	23%	12%	16%	11%	7%
Water efficient taps	17%	14%	10%	5%	3%
Made employees aware of the need to reduce water consumption	16%	15%	10%	12%	8%
Asked for smart meter	1%	2%	1%	1%	1%
Changed business processes to use less water	12%	5%	2%	2%	2%
Rainwater harvesting	6%	5%	2%	2%	2%
Only put required amount in kettle	2%	2%	2%	1%	2%
Water efficient urinals i.e. waterless, timers etc.	4%	4%	0%	1%	0%
Use of a borehole	<1%	0%	1%	0%	0%
Monitor/keep an eye out for leaks	3%	4%	1%	1%	0%
Water efficient machinery used i.e. washing machine	1%	1%	2%	1%	0%
Use of water meters/regular meter readings etc.	2%	4%	0%	1%	1%
Generally being more cautious/frugal with water usage	1%	0%	2%	0%	1%
Water efficient toilets i.e. blocks, cisterns etc.	2%	3%	0%	<1%	1%
Carried out assessment i.e. water audit, risk assessment etc.	2%	1%	<1%	1%	<1%
Water is recycled/reused within business	1%	1%	1%	1%	1%
Water efficient showers i.e. added valve	0%	<1%	0%	<1%	0%
Other (specify)	13%	2%	3%	2%	3%

Base: 2278

Appendices

Appendix 1 - Quotas

Number of employees (business size)		Quota	%
Micro	0-9	1153	50%
Small	10-49	547	24%
Medium A	50-99	283	12%
Medium B	100-249	128	6%
Large	250+	190	8%

WaSC Region	Quota	%
Northumbria	200	9%
North West	200	9%
Yorkshire	200	9%
Midlands	200	9%
Eastern	200	9%
Thames	200	9%
Southern	200	9%
South West	200	9%
Wales	500	22%
Wessex	200	9%

	Sector	Quota	%
A	Agriculture, Forestry and Fishing	124	5%
B	Mining and Quarrying	1	<1%
C	Manufacturing	136	6%
D	Electricity, Gas, Steam and Air Conditioning Supply	5	<1%
E	Water Supply Sewerage Waste Management and Remediation	7	<1%
F	Construction	230	10%
G	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	378	16%
H	Transportation and Storage	107	5%
I	Accommodation and Food Service Activities	176	8%
J	Information and Communication	146	6%
K	Financial and Insurance Activities	45	2%
L	Real Estate Activities	90	4%
M	Professional, Scientific and Technical Activities	345	15%
N	Administrative and Support Service Activities	165	7%
O	Public Administration and Defense; Compulsory Social Security	8	<1%
P	Education	48	2%
Q	Human Health and Social Work Activities	123	5%
R	Arts, Entertainment and Recreation	62	3%
S	Other Service Activities	104	5%

Appendix 2 – Weighting factors

	Micro 0-9	Small 10-49	Medium A 50-99	Medium B 100-249	Large 250+
Eastern	1.8	0.6	0.2	0.2	0.1
Northumbria	0.6	0.2	0.1	0.0	0.0
Southern	1.6	0.5	0.1	0.1	0.0
Midlands	3.1	0.9	0.2	0.2	0.1
Thames	6.6	1.3	0.3	0.5	0.2
South West	0.6	0.2	0.0	0.0	0.0
North West	2.3	0.6	0.2	0.2	0.1
Wessex	1.0	0.3	0.1	0.1	0.0
Wales	0.4	0.1	0.0	0.0	0.0
Yorkshire	2.0	0.5	0.2	0.1	0.0

	Sector	Weighting factor
A	Agriculture, forestry and fishing	0.5
B	Mining and quarrying	0.1
C	Manufacturing	0.7
D	Electricity, gas, steam and air conditioning supply	0.3
E	Water supply; sewerage, waste management and remediation activities	0.5
F	Construction	2.2
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	0.8
H	Transportation and storage	1.3
I	Accommodation and food service activities	1.0
J	Information and communication	3.0
K	Financial and insurance activities	2.6
L	Real estate activities	1.2
M	Professional, scientific and technical activities	1.3
N	Administrative and support service activities	2.3
O	Public administration and defense; compulsory social security	0.2
P	Education	0.7
Q	Human health and social work activities	0.9
R	Arts, entertainment and recreation	0.9
S	Other service activities	0.5

Appendix 3 – Sample profile

	Total Unweighted		Total Weighted	
	No.	%	No.	%
Total	2,300	100	2,300	100
Region				
Northumbria	199	9	72	3
North West	200	9	245	11
Yorkshire	182	8	182	8
Midlands	203	9	348	15
Eastern	203	9	223	10
Thames	202	9	760	33
Southern	204	9	172	7
South West	203	9	68	3
Wales	505	22	113	5
Wessex	196	9	116	5
Business size				
0-9 employees	1130	50	1926	85
10-49 employees	556	25	283	12
50-99 employees	207	9	33	1
100-249 employees	141	6	16	1
250+ employees	207	9	11	<1
Nature of the business				
A. Agriculture, Forestry and Fishing	186	8	109	5
B. Mining and Quarrying	8	<1	1	<1
C. Manufacturing	224	10	120	5
D. Electricity, Gas, Steam and Air Conditioning Supply	16	1	5	<1
E. Water Supply Sewerage Waste Management and Remediation	13	1	6	<1
F. Construction	122	5	203	9
G. Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	413	18	422	18
H. Transportation and Storage	71	3	106	5
I. Accommodation and Food Service Activities	197	9	204	9
J. Information and Communication	53	2	142	6
K. Financial and Insurance Activities	35	2	53	2
L. Real Estate Activities	73	3	94	4
M. Professional, Scientific and Technical Activities	184	8	330	14
N. Administrative and Support Service Activities	81	4	157	7
O. Public Administration and Defence; Compulsory Social Security	39	2	7	<1
P. Education	149	6	42	2
Q. Human Health and Social Work Activities	168	7	113	5
R. Arts, Entertainment and Recreation	85	4	65	3
S. Other Service Activities	183	8	122	5

	Total Unweighted		Total Weighted	
	No.	%	No.	%
Total	2,300	100	2,300	100
Services used (England & Wales)				
Water	2,278	99	2,280	99
Sewerage	1,902	83	1,908	83
Surface Water Drainage	489	21	427	19
Trade effluent removal	130	6	69	3

	England Unweighted		England Weighted	
	No.	%	No.	%
Total	1,795	100	2,187	100
Services used (England)				
Water	1,795	99	2,167	99
Sewerage	1,511	84	1,819	83
Surface Water Drainage	417	23	414	19
Trade effluent removal	100	6	65	3

	Wales Unweighted		Wales Weighted	
	No.	%	No.	%
Total	505	100	113	100
Services used (Wales)				
Water	500	99	113	99
Sewerage	391	77	89	79
Surface Water Drainage	72	14	12	12
Trade effluent removal	30	6	4	3

	Unweighted		Weighted	
	No.	%	No.	%
Total	1,963	100	1,963	100
Spend				
Less than £500	665	34	1,046	53
£500-£999	431	22	453	23
£1000-1999	311	16	238	12
£2000-£4999	246	13	153	8
£5000-£9999	114	6	43	2
£10,000-£49,999	148	8	26	1
£50,000 or more	48	2	4	<1

Appendix 4 - Questionnaire

CCWater Testing the Waters: Research into business customer's views on water and sewerage services

Introduction

Good Morning/Afternoon, my name is... calling from XXXXXX on behalf of the Consumer Council for Water, which is the consumer body for the water industry. Could I speak to the person responsible for paying the water bill or arranging water utility contracts?

We are carrying out a survey about water and sewerage services. The survey findings are used to help make sure that you get good water and sewerage services, and a high standard of customer service if you ever have a query. Could you spare some time to answer some questions?

It should take around 15 minutes.

Everything you say will be treated in confidence and won't be shared with anyone else; unless you say otherwise CCwater will only receive anonymous responses

CCWater and ORS are the joint data controllers of the information we collect. ORS adheres to the Data Protection Act 1998/2018, as well as GDPR (The General Data Protection Regulation). For more information, please go to ors.org.uk/privacy

If necessary: For more information, please go to ors.org.uk/privacy.

If necessary: Some of the questions will need you to be familiar with your water bill and so you may find it useful to have it to hand - would you be interested in taking part now or at another time when you have the bill in front of you?

READ OUT: Just to let you know, this call may be monitored or recorded for training and quality purposes only

For pilot: CCWater may request to listen to a number of interviews which we have carried out for quality and training purposes. Would you be happy for someone from CCWater to listen to this call, and for us to pass on a recording of this interview to a small group of key research staff at CCWater for this purpose?

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey:

About you / your company

S1a Can I just ask, are you the person who deals with utility suppliers, or pays the water bill for your business, or both?

Yes – deals with utility suppliers

CONTINUE

Yes – pays the bill

CONTINUE

Yes – both

CONTINUE

No

ASK FOR RELEVANT PERSON

NOTE: The respondent must be the person responsible for paying the water bill/handling queries and complaints/contacts, on behalf of the business.

ONLY ONE RESPONDENT TO BE INTERVIEWED PER COMPANY

Screening questions

S1b And are you a...
Company representative on-site
Head office company representative
Both
Other (specify)

POSTCODE: Can I take the postcode of the site you usually work at?

[POSTCODE LOOKUP FOR WATER REGION]

S2a How many sites does your business have in England?

TYPE IN NUMBER OF SITES

S2b How many sites does your business have in Wales?

TYPE IN NUMBER OF SITES

If S2a and S2b sum = 0, THANK AND CLOSE

*I'm sorry, for this research we need to speak to organisations with premises in England or Wales. **INTERVIEWER: If respondent changes their mind, go back and code as appropriate.***

S4ai Please give a rough estimate of the number of employees on the site you usually work at, including yourself

If necessary: read out categories

- 1
- 2-10
- 11-50
- 51-100
- 101-250
- More than 250
- DK

ASK S4B IF MULTIPLE SITES I.E SUM S2A and/or S2B >1:

S4b How many employees are there in total in the business in England and Wales?

If necessary: read out categories

- 1
- 2-10
- 11-50
- 51-100
- 101-250
- More than 250
- DK

ASK IF S4b/sum S2a+S2b=1 & S4ai = SOLE TRADER (1 employees) OR MICRO BUSINESS (2-10 employees) or SMALL BUSINESS (11-50 employees)

S1ai Is this business run from a business premise or from somewhere else, e.g. a home

residence or a mobile business?

INTERVIEWER MAKE SURE THAT THIS BUSINESS IS NOT RUN FROM SOMEONE'S HOME

Business premise

No fixed business premise (e.g. van/home residence) **THANK AND CLOSE**

DISPLAY: From this point on the questions are about the site which you usually work at

ASK ALL:

S3 Would you say the nature of your business is mainly [Detailed SIC taken from sample]

Yes

No

If S3=no:

S3b How would you classify the nature of the business?

A Agriculture, Forestry And Fishing

B Mining And Quarrying

C Manufacturing

D Electricity, Gas, Steam And Air Conditioning Supply

E Water Supply; Sewerage, Waste Management And Remediation Activities

F Construction

G Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles

H Transportation And Storage

I Accommodation And Food Service Activities

J Information And Communication

K Financial And Insurance Activities

L Real Estate Activities

M Professional, Scientific And Technical Activities

N Administrative And Support Service Activities

O Public Administration And Defence; Compulsory Social Security

P Education

Q Human Health And Social Work Activities

R Arts, Entertainment And Recreation

S Other Service Activities

Other (specify)

S5a What water and sewerage services are you billed for? MULTI CODE

a) Water (Routes in Q6)

b) Sewerage – i.e. removing and treating used water (Routes in Q6)

c) Surface water (rainwater) drainage (Routes in Q6)

d) Trade Effluent removal (Routes in Q6)

e) Other (specify)

ASK ALL:

S6 For the site you usually work at, how much do you pay for all of these services in total each year?

Less than £500

£500-£999

£1000-1999

£2000-£4999
£5000-£9999
£10,000-£49,999
£50,000 or more
DK

- S7 And for this site roughly what percentage of the total annual running costs do these services represent? Please select from the following bandings
- 0-5%
 - 6-10%
 - More than 10%

AWARENESS OF CURRENT SERVICE PROVIDERS Questions 1 to 3 coded off a list of wholesalers for water, sewerage and retail service providers. The approach outlined below has been adapted from that used in previous surveys. It aims to identify awareness of service providers without informing respondents about the market as we want to measure awareness of this later in the survey.

Q1. Which company provides water services i.e. supplies clean water to the site you usually work at **SINGLE CODE – DO NOT PROMPT BUT CORRECT THEM IF DOESN'T MATCH EXPECTED COMPANY or if say don't know** – Our records show that **[WHOLESALE REGION FROM SAMPLE]** should be supplying your site. Does that sound correct?

Anglian Water

Dwr Cymru (Welsh Water)

Northumbrian Water

Severn Trent Water

South West Water

Southern Water

Thames Water

United Utilities

Wessex Water

Yorkshire Water

Water only companies:

Bournemouth Water

Bristol Water

Cambridge Water

Cholderton Water **(Thank and close)**

Dee Valley Water

Essex & Suffolk Water

Hartlepool Water

Portsmouth Water

South East Water

South Staffordshire Water

Sutton & East Surrey Water

Affinity Water (Central)

Affinity Water (East)

Affinity Water (Southeast)

Private water supply doesn't come from a water company (e.g. borehole) CLOSE

Other company named SPECIFY

Don't know

Check against postcode lookup, RECORD AS SPECIFIED BY RESPONDENT

ASK IF Q1= WOC and if S5A=b:

Q2. Which company provides sewerage services for this site, i.e. removes and treats water used by staff toilets, kitchens and also water used for business purposes where it doesn't need specialist treatment?

SINGLE CODE – DO NOT PROMPT BUT CORRECT THEM IF DOESN'T MATCH EXPECTED COMPANY or if say don't know – Our records show that [WHOLESALE REGION FROM SAMPLE] should be supplying your site. Does that sound correct?

- Anglian Water Services Ltd
- Dwr Cymru (Welsh Water)
- Northumbrian Water Ltd
- Severn Trent Water Ltd
- South West Water Ltd
- Southern Water Services Ltd
- Thames Water Utilities Ltd
- United Utilities Water Plc (North West Water)
- Wessex Water Services Ltd
- Yorkshire Water Services Ltd
- I have a private facilities/septic tank
- Other company named SPECIFY
- Don't know

Check against postcode lookup, RECORD AS SPECIFIED BY RESPONDENT

Interviewer note: If respondent answers 'have private facilities/septic tank' or 'other', do not ask Section on wholesale sewerage services in the questionnaire (Q18 to Q19).

SATISFACTION WITH VFM OF WHOLESAL SERVICES

ASK ALL:

Q5. How satisfied or dissatisfied are you with the value for money of:

READ OUT EACH STATEMENT & SINGLE CODE

- Very satisfied,
- Fairly satisfied,
- Neither satisfied nor dissatisfied,
- Fairly dissatisfied,
- Very dissatisfied,
- Don't know

ROUTE ALL FROM S5A

- a) The **water** services supplied to this site
- b) The **sewerage** service for this site
- c) The **surface water (rainwater) drainage** services for this site
- d) The **trade effluent** services

IF RESPONDENT ANSWERS FAIRLY/VERY DISSATISFIED TO Q5A, B, C, OR D ASK Q6

Q6. Why do you think you don't get value for money?

DO NOT READ OUT. MULTICODE

Cost/prices have risen

Bills generally too expensive

Removal of surface water is too expensive (**ask if billed for surface water at S5A**)

Poor/inefficient service/issues not resolved

Poor water quality

Problems with sewers/drains

Site area surface water drainage tariff unfair

Leaking pipes

Water meter issues/problems

Business wanted to switch provider but was not allowed to

Not sure how to contact them

Other (specify)

SATISFACTION WITH WATER SUPPLY SERVICE AND WATER SAVING

Q15. Thinking now about water supplied to this site for offices, toilets, or business processes, overall how satisfied or dissatisfied are you with the water supply for this site?

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

Not applicable

Don't know

ASK IF Q15= V/F Dissatisfied

Q15B. Why?

Q17. What actions, if any, has your business taken to reduce its use of water at this site?

DO NOT READ OUT. MULTICODE.

Nothing

Hippo/Save A Flush device in toilet cisterns

Water efficient taps

Made employees aware of the need to reduce water consumption

Asked for smart meter

Changed business processes to use less water

Rainwater harvesting

Only put required amount in kettle

Other (specify)

Don't know

SATISFACTION WITH SEWERAGE SERVICE

Only ask this section if billed for sewerage services at S5a = b

Q18. Thinking now about the sewerage services provided for this site, overall, how satisfied or dissatisfied are you with your sewerage services?

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know

ASK IF Q18= V/F Dissatisfied

Q18B. Why?

Q19. How satisfied or dissatisfied are you with your sewerage company's management of **each** of the following aspects of their service:

READ OUT EACH STATEMENT AND SINGLE CODE

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know
- Not applicable

e) Removal of Trade effluent (**only ask S5a=d**)

f) Removal of surface water (rainwater) from the site (**only ask S5a=c**)

RELATIONSHIP WITH YOUR WHOLESALE WATER SERVICE PROVIDERS

ASK IF POSTCODE= ENGLISH WATER SUPPLY AREA.

Q20. How much do you agree or disagree that [WoC/WaSC from Q1] cares about the service it gives to **business** customers? **READ OUT. SINGLE CODE**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

ASK IF POSTCODE= ENGLISH WATER SUPPLY AREA.

Q21. How much do you trust [WoC/WaSC from Q1]. Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all? **READ OUT. SINGLE CODE**

- 10 – trust them completely
- 9
- 8

- 7
- 6
- 5
- 4
- 3
- 2
- 1 – don't trust them at all

ASK ALL

Q22. How likely would you be to recommend [WoC/WaSC from Q1] for the clean water supply services they provide?

- 10 extremely likely
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1
- 0 not at all likely to recommend

Q23. Now, thinking about the main energy company you use for your business, on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all, how much do you trust the main energy company that you use for your business? **READ OUT. SINGLE CODE**

- 10 – trust them completely
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1 – don't trust them at all

MARKET REFORM

ASK IF ENGLISH WATER SUPPLY AREA. IF IN WALES (Dee Valley or Welsh Water areas), ASK WELSH SCRIPT

Q24. Do you think it is possible or not possible to switch the following service providers for your organisation?

SINGLE CODE PER RESPONSE, RANDOMISE

- Water
- Energy (e.g. gas or electricity)

- Telecoms (e.g. broadband or landline telephone)
- a. Possible
 - b. Not possible
 - c. Don't know

Q24b. Do you think it is possible or not possible to negotiate a better deal with the following service providers currently supplying your business?

SINGLE CODE PER RESPONSE, RANDOMISE

- Water
 - Energy (e.g. gas or electricity)
 - Telecoms (e.g. broadband or landline telephone)
- a. Possible
 - b. Not possible
 - c. Don't know

READ

Since April 2017, businesses, charities and public sector organisations in England have been able to change the company providing their water and sewerage retail services (as they are able to with energy), or negotiate a better deal with their existing service provider. Retail service providers bill your business for water and sewerage services, provide customer services and read any water meters at this site

Ask All

Q25i Were you aware of this change prior to this survey?

SINGLE CODE

- a. Yes **Q26**
- b. No **Q31**
- c. Don't know **Q31**

Q27 Since hearing about this has your organisation:

- a) Chosen a new supplier and switched? **(Interviewer: this includes those in the process of switching) Q27b**
- b) Not switched, but negotiated a better price or service contract going forward with your existing service provider
- c) Looked for information about the water market and the choices available but have decided not to switch or renegotiate **Q30**
- d) Looked for information and the choices available but have not switched or renegotiated **Q30**
- e) Tried to switch but the switch was cancelled.
- f) Taken no action to find out about the market or choices available **Q30**

SINGLE CODE

- a. Yes
- b. No
- c. Don't know

Q27b (ASK if Q27=1)

Just to double check that your organisation chose a supplier to switch to?

INTERVIEWER: If the respondent believes they did not choose their retailer then they should NOT be coded as switched.

If NO, move back and recode.

If necessary: if you are billed by a company which is new to you, but you did not choose this company, then your account has been transferred to one of the new water companies which now send bills, provide customer services and read water meters.

Yes – chose to switch - continue **1**

Q3. Which water company bills your business for water and sewerage services, provides customer services and reads any water meters at this site?

RECORD AS SPECIFIED single code off list of wholesale/retail companies

DO NOT PROMPT - INCLUDE DON'T KNOW OPTION

Advanced Demand Side Management (ADSM)	Sembcorp Bournemouth Water
Affinity for Business (Retail)	SES Business Water
Affinity Water	Severn Trent Water
Albion	Source for Business (Pennon)
Anglian Water (Hartlepool Water)	South East Water
Anglian Water Business	South East Water Choice (Invicta)
Bournemouth Water Business	South Staffordshire Water
Bristol Water	South Staffs Water Business (SSWB)
Business Stream	South West Water
Cambrian Utilities	South West Water Business
Castle Water	Southern Water
Cholderton	Sutton & East Surrey Water
Clear Business Water	SSE Water
Dee Valley Water	Thames Water
Dŵr Cymru (Welsh water)	Thames Water Commercial Services
Everflow	The Water Retail Company
Greene-king	Three Sixty
Icosa Water Services	United Utilities
Independent Water Networks (IWN)	Veolia
Kelda	Water 2 Business
Northumbrian Water	Water Plus
NWG Business (Retail)	Waterscan
Peel Water (POD53)	Wessex Water
Pennon Water Services (Source for Business)	Whitbread Group
Portsmouth Water	Yorkshire Water
Regent Utilities	Yorkshire Water Business Services
Scottish Water	Other (please specify)
	Don't Know
	Refused

Ask Q28 if switched

Q28. Overall, how satisfied or dissatisfied were you with the switching process?

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know

ASK if dissatisfied

Q29. WHY? **MULTI**

- Took too long
- New account details are wrong – name, payments
- Closing bill inaccurate – estimated meter reading
- Meter details are incorrect
- Getting two bills for one meter
- Other (specify)

Q30 **Ask if not switched/renegotiated since April 2017**

Why have you not switched or renegotiated?

ASK ALL

Q34. What percentage level of saving on your water and sewerage charges would prompt/prompted your business to switch service provider?

TYPE IN PERCENTAGE SAVINGS REQUIRED

_____ %

- I will not switch
- I will not switch for price, only for a better service

Q31. How likely or unlikely is your organisation to do each of the following in the next 6 months

SINGLE CODE PER RESPONSE, RANDOMISE

- a. Choose a new supplier and switch (if switched at Q27= again)
- b. Negotiate (if renegotiated at Q27 = again for) a better price or service contract going forward with your existing service provider
- c. Look for information about the water market and the choices available

SINGLE CODE

- Very likely
- Quite likely
- Neither likely nor unlikely
- Quite unlikely
- Very unlikely
- Don't know

RELATIONSHIP WITH RETAIL SERVICE PROVIDER

The next few questions are about the company that provides billing, meter reading and customer service at your site.

ASK IF ENGLISH WATER SUPPLY AREA. IF IN WALES (Dee Valley or Welsh Water areas), ASK WELSH SCRIPT

Q36. How much do you agree or disagree that this company cares about the service it gives to **business** customers? **READ OUT. SINGLE CODE**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

Q12 How much do you agree or disagree that it is clear how much needs to be paid and when? **SINGLE CODE**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

Q13 How satisfied or dissatisfied are you with the overall customer service, meter reading and billing services you receive from this company?

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied

Q14 **If dissatisfied**

Why? **MULTI**

- Billing errors (amount/account details)
- Problems after account transferred
- Meter not read/reading wrong
- Can't get through on the phone
- Delay in responding to query
- Not taking ownership of problems
- Not sure who to contact anymore
- Can't have an account manager
- They should have made it clear who they are/that the account was transferred
- Other (specify)

ASK IF ENGLISH WATER SUPPLY AREA

Q37. How much do you trust this company? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all?

READ OUT. SINGLE CODE

- 10 – trust them completely
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1 – don't trust them at all

ASK IF ENGLISH WATER SUPPLY AREA.

Q38. How likely would you be to recommend this company for the billing, meter reading and customer services they provide?

- 10 extremely likely
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1
- 0 not at all likely to recommend

AWARENESS OF WHO TO CONTACT, SATISFACTION WITH CONTACT AND RETAIL SERVICES

ASK IF ENGLISH WATER SUPPLY AREA.

Q7. Who would you contact to report a problem with the water supply?

Pre-codes as Qs 1-3

Other – specify

ASK IF ENGLISH WATER SUPPLY AREA.

Q8. Who would you contact if you had a question about the bill?

Pre-codes as Qs 1-3

Other - specify

Q9. Since April 1st 2017, have you contacted your service provider with an enquiry or complaint?

Yes

GO TO Q10ai

No

GO TO Q39

Don't know

GO TO Q39

Q10ai. Which company did you contact most recently?

SINGLE CODE

[Wholesale name] (Wholesaler)

[Retailer name] (Retailer)

Q10aii If [wholesaler] named ask:

Did [wholesaler] deal with your enquiry or complaint themselves or did they refer you/your query to [retailer identified at Q3]?

[Wholesaler] dealt with the enquiry or complaint

Referred to [retailer]

Don't know/don't recall

ASK IF YES AT Q9 (CODES 1)

Q10b.

What was your most recent contact about?

DO NOT READ OUT. MULTICODE

Billing enquiry

To report a leak

Sewerage problem

Loss of supply after icy weather

Issue with water meter

No supply/supply issue

Water quality

Water pressure

To make a complaint

To change to/ask for a water meter

To find out about switching

Other (please specify)

Don't know

ASK IF YES AT Q9 (CODES 1)

Q11. Overall how satisfied or dissatisfied were you with the contact with [company]

Very satisfied

Fairly satisfied

Neither satisfied or dissatisfied

Fairly dissatisfied

Very dissatisfied

Don't know

How satisfied or dissatisfied were you with each of the following aspects:

READ OUT EACH STATEMENT & SINGLE CODE

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

Don't know

a) The ease of contacting someone who was able to help you

- b) The quality or clarity of information provided
- c) The knowledge and professionalism of staff
- d) The feeling that your query had been, or would be, resolved
- e) The way that you were kept informed of progress with your enquiry (and /or) claim

ASK IF ENGLISH WATER SUPPLY AREA.

Now, thinking about the water and sewerage services your business receives at this site, and the bills and customer service you receive:

Q39. If you could make one single improvement to any of these, what would it be?

If necessary: This might be something your business finds useful in other utilities or services, or it could be something specific to your water and sewerage services

DO NOT READ OUT. RECORD VERBATIM AND CODE FROM BELOW. Single code

Nothing in particular

Lower Bill

More accurate bills/charges

Water supply – quality/pressure/reliability

More responsive to problems/take ownership of problems

General Information/communication-More/better/quicker

Customer service - easier to make contact with

Sewerage pipes – maintain/improve

Other – specify

Don't know

Q44. CCWater may be conducting further research about the water market in the next 2 years or so, and we would really value your input. If you agree, CCWater or a provider on their behalf may contact you to ask if you would like to take part. ORS would not share your details with anybody else. Would you be happy to be re-contacted in the next 2 years to conduct further research?

Yes – confirm details

No

RECONTACT (ASK ALL)

Finally, just to let you know that you may be contacted for quality control purposes or in the event of us wanting to speak to you very briefly again in relation to this survey only. Would we be able to contact you?

INTERVIEWER: Please explain if necessary that they will not necessarily be contacted again. It will only be in the case of us wanting to ask an additional question for the survey or for verifying something they've said for quality control purposes.

- Yes 1
- No 2
- Refused 98

THANK & CLOSE

CONSUMER COUNCIL FOR

CYNGOR DEFNYDDWYR



The Consumer Council for Water

1st Floor, Victoria Square House, Victoria Square, Birmingham B2 4AJ

Visit our website: www.ccwater.org.uk

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