Non-household Customer Insight Survey 2020
BMG report

Prepared for: The Water Services Regulation Authority (Ofwat and CCW)

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1. Project overview

1.1 Background

Since April 2017, non-household customers (businesses, charities and public-sector organisations) across England have been able to choose who supplies their water and sewerage retail services. This follows the model set by the electricity, telecoms and gas industries which separate the customer supply and infrastructure elements of the business from billing, customer service and meter readings (retail services). Customers in Wales who use 50,000,000 litres (50 Ml) of water or more a year are also able to switch retail services. These retail services include billing, water meter reading and customer services.

By introducing competition, the overall aim was to improve customer service and reduce costs for customers whilst ensuring that assets are protected and effectively maintained. The opening of the market means that (like many other utility markets) eligible organisations will be free to either switch suppliers or negotiate a better deal with their existing retailer. In addition, customers also have the option to become their own retailer and 'self-supply' their own sites with retail services.

As part of their regulatory role, the Water Services Regulation Authority (henceforth Ofwat) has been responsible for overseeing the introduction of competition across the water Industry in England and Wales.

Following initial surveys in 2017/2018 and 2019, in November 2019 Ofwat appointed BMG Research to undertake customer research, which again has been commissioned and funded as a collaborative research project between Ofwat and the Consumer Council for Water (CCW). Both organisations' objectives for the research were to gain further insight from business (i.e. non-household) customers about their experiences and views concerning the business retail water market, including the extent to which they have engaged with the market, how far their needs and expectations have been met, and the reasons for these outcomes.

The research includes eligible business customers who have switched provider, renegotiated a new deal with their existing provider, or not switched or renegotiated.

The survey comprised two main elements:

- Representative survey of all eligible non-household customers;
- Survey of customers who have either switched retailers or renegotiated with their retailer.

1.2 Representative survey of eligible non-household customers

1.2.1 Objectives

The aim of the representative survey of eligible non-household customers was to gather views from a representative sample of all types and sizes of businesses, charities and public-sector organisations in England (also including eligible high-water users in Wales) and to investigate their experiences interacting with the newly opened market.

The survey was carried out by telephone over an 8-week period between 9th January and 2nd March 2020 and included questions on the following topics:

- Awareness of changes in the market
- Overall satisfaction
- Market engagement
- Searching and comparing
- Problems and complaints
- General contact with their retailer
- General views of the market

A stratified sample was designed to ensure that differences between organisations of different sizes and in different sectors, and differences between water company regions could be measured. Quota controls were used to ensure a representative sample and 1,006 full interviews were achieved overall.

1.2.2 The sample

The sample comprised registered businesses, charities and public-sector organisations based wholly or mainly in England. It was purchased from Experian, a commercial source of business contacts. Additional contacts were sourced from Dŵr Cymru, which provided a list of all eligible organisations in Wales[1] (using 50 Ml or more per year).

1.2.3 Eligibility

The first wave of the survey is therefore representative of all eligible non-household customers in England and Wales.

Eligibility differs in England and Wales. Within England, not all businesses, charities and public-sector organisations are eligible to switch water and/or waste water retail services in the open market. The organisation must operate from a business premises, pay business rates, and not use a household water supply (i.e. those who run a business from their own home are not eligible). Furthermore, some organisations that rent their business premises will do so with the utility services provided by the landlord, so they are not responsible for

[1] Just 3 organisations

who supplies their water and/or wastewater retail services (along with other utilities) and are not able to choose the retailer.

Within Wales, owing to a decision made by the Welsh Government, customers who receive their water and waste water retail services from Dŵr Cymru (Welsh Water) or the area that was formerly Dee Valley Water (based mainly or wholly in Wales, but is now known as Hafren Dyfrdwy) will only be able to switch if they use at least 50 Ml of water a year at their property. These eligible Welsh customers were identified with help from Dŵr Cymru for inclusion in the research.

During Ofwat's Customer Awareness Survey, conducted in 2016, an estimate of the eligible non-household population was created using questions to assess eligibility. When respondents were determined to be ineligible to switch retailer either because their water supply was provided by their landlord, or because the business only had a household water supply they were screened out. This represented around a third (34%) of all successful contacts overall, but varied substantially by business size, type and region.

It is important to note that assumptions regarding eligibility to switch retailer were applied to the raw contact sample, and thus the sample design intentionally did not match the profile of the overall population. The figures quoted in this section are based on data that has not been adjusted for eligibility. However, the achieved sample was weighted in order for it to take into account eligibility to switch retailer and thus appropriately reflect the differences by size, sector and region and be representative of business customers.

1.2.4 Weighting

The sample design aimed to achieve a representative sample by water region.

Weights were applied based on BEIS Business Population Estimates to account for over-sampling of small (10-49), medium (50-249 employees) and large (250+ employees) organisations.

Any differences between the achieved sample and the target population in terms of size, Standard Industrial Classification (SIC) or region were corrected by statistical weighting. This process ensures that the overall results are representative of all eligible organisations across the whole of England and Wales, taking into account the difference in eligible population in Wales.

The tables overleaf show the differences between the weighted and unweighted sample profile.

1.2.5 Profile tables

Full details of the profile characteristics of the sample are shown in the tables below.

Table 1: Water region

	Unweighted		Weighted	
	Number	**%**	**Number**	**%**
Overall	**1,006**	**100%**	**1,006**	**100%**
Anglian Water	143	14%	107	11%
Northumbrian Water	38	4%	34	3%
Southern Water	94	9%	102	10%
Severn Trent Water	178	18%	161	16%
South West Water	50	5%	35	3%
Thames Water	180	18%	327	33%
United Utilities	122	12%	120	12%
Wessex Water	55	5%	35	3%
Dŵr Cymru	53	5%	<0.5	<0.5%
Yorkshire Water	93	9%	85	8%

Table 2: Size of organisation

	Unweighted		Weighted	
	Number	**%**	**Number**	**%**
Overall	**1,006**	**100%**	**1,006**	**100%**
Zero/micro (0 to 9 employees)	295	29%	869	86%
Small/medium (10 to 249 employees)	525	52%	133	13%
Small (10 to 49 employees)	310	31%	112	11%
Medium (50 to 249 employees)	215	21%	21	2%
Large (250+ employees)	186	18%	4	<0.5%

Table 3: Sector of organisation

	Unweighted		Weighted	
	Number	**%**	**Number**	**%**
Overall	**1,006**	**100%**	**1,006**	**100%**
A - Agriculture, forestry and fishing	42	4%	40	4%
B, D, E - Mining, quarrying and utilities	4	<0.5%	4	<0.5%
C - Manufacturing	151	15%	60	6%
F - Construction	42	4%	105	10%
G - Wholesale/retail/motor trades	180	18%	169	17%
H - Transport and storage (inc. postal)	21	2%	48	5%
I - Accommodation and food services	56	6%	75	7%
J - Information and communication	27	3%	69	7%
K, L - Financial and insurance, real estate	21	2%	63	6%
M - Professional, scientific and technical	50	5%	153	15%
N - Business administration and support services	95	9%	74	7%
O - Public administration and defence	6	1%	3	<0.5%
P - Education	133	13%	20	2%
Q - Health	99	10%	49	5%
R, S - Arts, entertainment, recreation and other services	79	8%	73	7%

Some columns do not sum to the total or to 100% due to rounding of individual figures. This is particularly likely with regard to weighted figures where fractions of cases are introduced when data is weighted

1.2.6 Interpretation of data

It should be remembered that a sample, and not the entire population of organisations has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences between different groups within the population are necessarily statistically significant. Throughout the report significant differences over time, and by sub-groups of the population are noted.

Where differences have been highlighted as significant there is a 95% probability that the difference is significant and not due to chance. Differences that are not said to be 'significant' or 'statistically significant' are indicative only, and these are identified as directional differences. When comparing results between sub-groups, on the whole, only results which are significantly different are highlighted in the text.

Where sub-group results are identified as higher or lower than average, this means that they are significantly different from the total sample results.

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

In some cases, figures of 2% or below have been excluded from graphs.

While all data shown are weighted, the sample bases are shown unweighted to provide an indication of the robustness of the data.

1.3 Survey of switchers/re-negotiators

1.3.1 Data source

The Market Operator Services Limited (MOSL) – the market operator for the business retail market for water in England and Wales - collects supply point identification (SPID) data, including information indicating whether a supply point had switched retailer. It also holds some information about the customers with which these SPIDs are associated. MOSL provided a complete database of SPIDs which had switched as of February 2020. As an organisation might have multiple premises, BMG used the information MOSL provided and sought to remove cases where a single organisation appeared multiple times (by virtue of having different premises and/or supply points), effectively going through a process of de-duplication. This provided a unique list of organisations that had undertaken one or more switching activity and serves as a reasonable profile of the entire population of switchers as of February 2020.

A sample was subsequently drawn from this population file, and telephone numbers were matched back to the sample using the company name and address. This was done using both Dun and Bradstreet's complete database of UK organisations, and from publicly available telephone numbers.

The original target for interviews with organisations on the MOSL database was 1,000. However during fieldwork it transpired that around two in five business contact details available to us from a commercially available set of business contact details did not in the event appear to correspond to customer supply point data from the MOSL database. (Note the MOSL database is an industry database created, among other things, to enable settlement between wholesalers and retailers and as such does not hold full details of end customers). As it was not always possible to identify mis-matched contacts before calling them, the target with regard to switchers or re-negotiators was reduced to 700.

Ultimately 707 interviews were actually achieved from organisations held on the MOSL database, and a further 134 switchers/re-negotiators were identified from the representative survey of all eligible customers. The results from these two groups have been combined where appropriate to increase the robustness of the results.

It should be noted that the results reported for switchers/re-negotiators are based on those who switched within the last 12 months, who account for two thirds (65%) of all switchers/re-negotiators.

1.3.2 The survey

The survey was carried out by telephone over an 8-week period between 9th January and 6th May 2020[2], and included questions on the following topics:

- Confirmation that they had switched retailers;
- Overall Satisfaction;
- Searching for information and comparing retailers;
- Motivations for switching/renegotiating;
- The process of switching/renegotiating;
- Outcomes of switching/renegotiating;
- Overall views of the water market.

1.3.3 Weighting

The MOSL database does not contain any data about any renegotiations that organisations have attempted with their retailer. Consequently, no weights have been applied to the data as there are no reliable estimates on which to base these.

1.4 Interpretation of data

It should be remembered that a sample, and not the entire population of organisations that have switched retailer, has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences between different groups within the population are necessarily statistically significant. Throughout the report significant differences by sub-group of the population are noted.

Where differences between demographic groups or between surveys have been highlighted as significant, this means that there is a 95% probability that the difference is statistically significant, as opposed to occurring by chance. Differences that are not said to be 'significant' or 'statistically significant' are indicative only. When comparing results between demographic sub-groups, on the whole, only results which are significantly different are highlighted in the text.

Where sub-group results are identified as higher or lower than average, this means that they are significantly different from the total sample results.

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

In some cases, figures of 2% or below have been excluded from graphs.

All data shown are unweighted.

[2] The majority of interviews were undertaken between 9th January and 2nd March 2020 and this was prior to the 'lockdown' introduced on the 23rd March 2020 in response to the Covid-19 breakout.

2. Executive summary

2.1 Key findings

Key findings of this research were that:

- **Satisfaction levels remain stable but billing and customer services issues remain** - 78% of eligible business customers reported satisfaction with their current water and wastewater retailer, which is in line with the 80% who did so in 2018/19. Around 6% of customers reported being dissatisfied, with the main reasons for this concerning billing issues (69% of those dissatisfied) and customer service issues (54%).
- **Awareness levels have increased** - 58% of eligible business customers - and 96% of large customers - are aware that they are able to change the company providing their water and wastewater retail services (switch) or potentially move to a better deal with their existing retailer (renegotiate). Awareness levels are up compared to the second year of the market (2018/19 at 53%) and the first year (2017/18 at 48%).
- **Market engagement is steady, with larger customers continuing to be more active than smaller customers** - around 4% of eligible business customers switched or renegotiated in the last 12 months – similar to the overall annual switching and re-negotiation rates seen in 2018/19, the second year of the market (4%). As in the second year of the market, larger customers were more active than smaller customers; around a quarter (26%) of large customers had switched, renegotiated, or had considered switching or renegotiating in the last 12 months, compared to 8% of micro-businesses.
- **Motivations for switching/renegotiating or considering are foremost but not exclusively price based** – of those who considered switching or renegotiating in the last 12 months, 38% did so with a view to achieving a lower price or bill. Nevertheless around a quarter also reported that they were interested in consolidating bills (23% consolidating water and wastewater bills, 25% consolidation across utilities).
- **Most customers (80%), who searched for information they felt they needed to make an informed choice, report it 'easy' to find the information they are looking for**– and a similar proportion (78% of those who searched) said it was 'easy' to compare different retailers (up from 40% in 2018/19). However, 17% report that it is difficult to find the information they are looking for – up from 8% in 2018/19.
- **Brokers remain an important source of information** - for many customers, with around a third (34%) of customers who had switched, renegotiated or considered switching or renegotiating reporting that they had used a broker as a means of searching for information (similar to 34% in 2018/19).
- **Interest and take up of water efficiency and leakage services remained low but has increased** – for example virtually no customers who had considered switching

or re-negotiating in the last 12 months cited interest in these services as a motivation for considering. Nonetheless 7% of those who switched in the last 12 months reported receiving new water efficiency or leak detection devices as a result of switching, compared to 4% who did so in 2018/19.

- **Switchers and re-negotiators reported benefits from having done so** – most (91%) of those who had switched or renegotiated in the last 12 months reported having received some form of benefit. The leading benefits cited were lower prices (66% for switchers, 72% for re-negotiators), with improvements in customer service (10% for switchers and 5% for re-negotiators) and quality of service (10% for switchers and 11% for re-negotiators) also prevalent.

2.2 Summary of findings

2.2.1 Awareness of changes

Close to three in five (58%) eligible businesses were aware, prior to the survey, that since April 2017 organisations have been able to change the company providing their water and waste water retail services (switch) or potentially move to a better deal with their existing retailer (renegotiate).

This continues the significant increases that were seen in 2019 (53%) as compared to 2017/18 (48%), with a further five percentage point increase in the latest survey.

Awareness increases significantly as business size increases. Large organisations (250+ employees) were more likely than average to be aware of the changes (96%), with awareness among this group returning to the levels seen in 2017/18 (89%), after a dip in 2019 (65%). Among small and medium (10 to 249 employees) organisations, while awareness was in line with the average (54% cf. 58%), this represents a significant decline on the 61% who were aware in 2019. If this is broken down to medium organisations (50 to 249 employees), awareness rises to 64%, but this remains in line with the average.

While organisations with 3 to 9 premises remain less likely than average to be aware of the changes (47%), those with 10 or more premises were both significantly more likely than average, and more likely than was the case in 2019, to be aware (92% compared to 58% and 45% respectively).

By broad industrial group, those in manufacturing (78%) and health (77%) were more likely, and those in business administration and support services were less likely (45%) than average to be aware of the changes.

2.2.1 Overall satisfaction

Overall, close to four in five (78%) reported satisfaction with their current water and waste water retailer, which is in line with the 80% who did so in 2019. Within this, significantly fewer were very satisfied (37% cf. 49%) and significantly more fairly satisfied (40% cf. 31%). Levels of dissatisfaction have remained low at 6% (cf. 8% in 2019).

Those paying annual bills of less than £2,000 were more satisfied than average, while those paying annual bills of £10,000 or more were more likely than average to be dissatisfied, as was the case in 2019.

Those in construction industries (96%) and those in education (88%) were more satisfied than average. By contrast, those in accommodation and food services (58%) and those in health and professional, scientific and technical industries were less satisfied than average (65% in both instances).

Where eligible businesses were satisfied, the main reason was because they had experienced no/few problems (49%), although significantly fewer mentioned this than was the case in 2019 (61%). A third (35%) gave no specific reason for their satisfaction (significantly more than the 25% who did so in 2019), and significantly fewer mentioned good customer service (9% cf. 17%) and price (9% cf. 15%).

The main reasons for dissatisfaction with their current water and waste water retailer were billing issues (69%) and customer service issues (54%), although these remain in line with 2019 (60% and 48% respectively), which saw a significant decrease since the 2017/18 survey. Generally the pattern of responses was very similar to 2019, with metering issues (24%) and pricing issues (13%) also coming through as sources of dissatisfaction.

Levels of satisfaction with their current water and waste water retailer were the same among those who had switched/renegotiated in the last 12 months and customers overall (78%)

Levels of dissatisfaction were consistent across both groups (6% overall and 8% switchers/re-negotiators).

2.3 Market engagement

For the purposes of the analysis, those who have switched or renegotiated, those who are in the process of or actively considering switching/renegotiating, those who had tried to switch/renegotiate but could not, and those who considered switching/renegotiating but decided not to, all within the last 12 months, have been grouped into a category of 'active customers'.

As shown in the figure overleaf, 7.8% of customers can be classified as active in the last 12 months on this basis.

While not directly comparable with the 2019 results, where consideration of switching/renegotiating and failed attempts to switch referred to an organisation's status since market opening (approximately a two year period), rather than the last 12 months, this represents a directional decrease on the 9.8% who were active in 2019[3].

Within this the proportion who switched/renegotiated within the last 12 months has remained stable at 3.8% (cf. 3.9% in 2019).

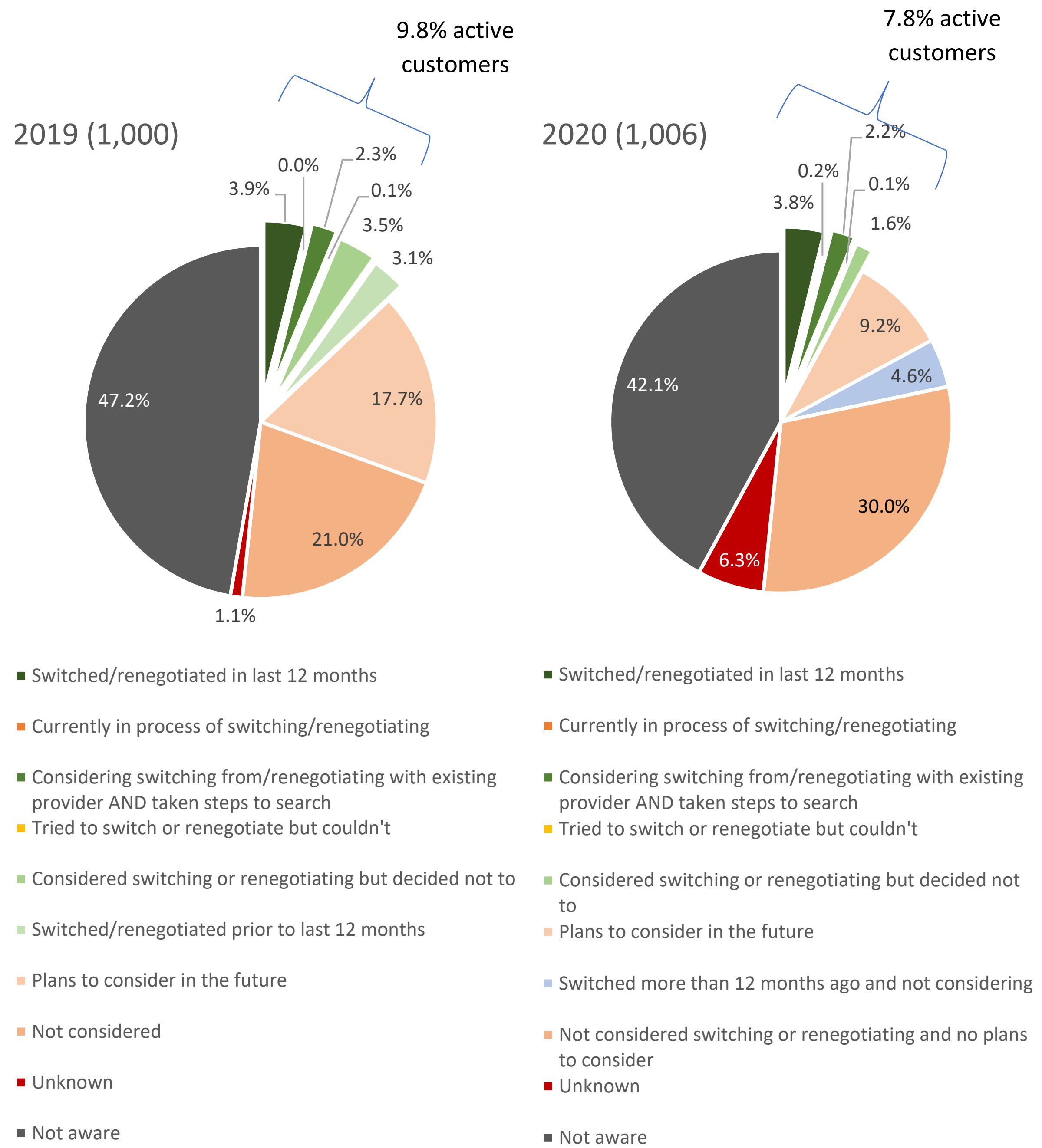
[3] Note Ofwat in 2019 reported proportion of customers active since market opening as 12.9%. This included 3.1% who had switched or renegotiated more than 12 months ago.

Few (2.2%) have considered switching/renegotiating and have taken steps to search in the last 12 months, which compares with the 2.3% who had done so since market opening in 2019.

The proportion who had considered but decided not to switch/renegotiate in the last 12 months stands at 1.6%, which compares with the 3.5% who had done so since market opening in 2019.

Significantly fewer reported planning to consider switching/renegotiating in the future (9.2% cf. 17.7%), while significantly more reported no consideration of switching/renegotiating, and no plans to do so (30.0% cf. 21.0%).

Figure 1: Market engagement



AR1/DR1/DR4/G1 Base: All representative customers (unweighted base sizes in parentheses)
Aggregate figures are subject to summation discrepancies even at the level of one-decimal point.

NB: 2020 results are not directly comparable with the 2019 results, where consideration of switching/renegotiating and failed attempts to switch referred to an organisation's status since market opening rather than the last 12 months.

For this reason, those who switched prior to the last 12 months in the 2020 survey are included within other categories. This group represents 8.0% of all eligible customers.

Overall, 1.4% of eligible customers had switched in the last 12 months and 2.4% had renegotiated, giving just less than one in twenty (3.8%) who had done either in the last 12 months. This pattern was very similar regardless of organisation size, unlike the 2019 results which showed that close to one in five (17%) large organisations had switched or renegotiated in the last 12 months.

However, medium and large organisations (50 or more employees) were significantly more likely than average to have been active at all in the last 12 months (15.8% of those with 50 to 249 employees, and 25.7% of those with 250 or more employees). For large organisations this figure was largely driven by the one in five (19%) who were currently in the process of switching or renegotiating. Large organisations were also more likely than average to be planning to consider switching or renegotiating in the future (26% cf. 9%) and to have switched or renegotiated more than 12 months ago (38% cf. 8%).

There were significantly more than average active customers in the last 12 months in the Anglian (19%) and Northumbrian (17%) water regions, and significantly less in the Thames (3%) water region. By industry, those in manufacturing (25%) and arts, entertainment, recreation and other (17%) were more likely to be active customers, and those in the professional, scientific and technical industries (1%) less so.

It is of note that 94% of those paying more than £100,000 have been active in some way in the last 12 months.

2.4 Searching and comparing

Of those eligible business customers who had switched or renegotiated or considered doing this at any point, 86% used at least one source to search for information about alternative retailers (significantly more compared to the 70% who did so in 2019). This figure fell to 77% of those who had been active in the last 12 months, with significantly fewer than average within this group reporting use of retailer websites (9%), price comparison websites (12%) and brokers (23%).

There has been a particularly significant increase in the proportion of all eligible business customers who have sourced information from a price comparison website, from 3% in 2019 to a quarter (25%) in the latest survey. Other sources of information driving the increase in searching for information were direct contact with a retailer (from 21% in 2019 to 32% in the latest survey), and the Open Water website (from 2% to 12%). Around a third continued to report using a broker (34% in both instances), and around one in twenty continued to report using a consultant (6% cf. 4%).

Among those who had switched/renegotiated in the last 12 months, while brokers remain the most common source of information, mentioned by a third of switchers/re-negotiators in the last 12 months, as was the case in 2019 (34% in both instances), there has been a significant increase in the proportion who report not searching for information about alternative retailers, from 15% in 2019, to 19% in the latest survey, and a decrease in the proportion making direct contact with another retailer (26% cf. 33%). However, there have been increases in the proportions of those who had switched/renegotiated in the last 12 months who searched for information via price comparison websites (20% cf. 14%) and via consultants (10% cf. 6%).

While the overall proportion of eligible businesses who found it easy to find the information they needed to make an informed choice is in line with that seen in 2019 (80% cf. 85%), within this directionally more customers found it ‘very’ rather than ‘fairly easy’. However, there has been a significant increase in the proportion who found it difficult, from 8% in 2019 to 17% in 2020, in many cases because they were unsure where to go.

While the overall proportion of those who had switched/renegotiated in the last 12 months who found it easy to find the information they needed to make an informed choice is in line with that seen in 2019 (81% cf. 85%), within this significantly fewer customers found it ‘very easy’ than was the case in 2019 (39% cf. 47%), such that more customers in the latest survey found it ‘fairly’ rather than ‘very easy’, unlike the 2019 survey. The proportion who found it difficult is in line with 2019 (8% cf. 7%).

Reflecting the increased use of price comparison websites, there has been a very large and significant increase in the proportion of customers who found it easy to compare different retailers, from 40% to 78%, with corresponding decreases in those giving a neutral response (from 30% to 15%) and those finding it difficult (from 30% to 7%).

The overall proportion of those who had switched/renegotiated in the last 12 months who found it easy to compare different retailers is in line with that seen in 2019 (70% cf. 72%). However, within this significantly more customers found it ‘fairly’ (41% cf. 33%) rather than ‘very easy’ (29% cf. 39%). Consequently a greater proportion in 2020 found it ‘fairly’ rather than ‘very easy’, in contrast to the 2019 survey. The proportion who found it difficult was in line with 2019 (8% cf. 11%).

2.5 Motivations

Among all eligible businesses who had actively looked into switching or renegotiating, the reasons for starting to look into it have switched from incentives/cashback (0% cf. 44%) and very much towards cost (38% cf. 23%) and consolidation, either to consolidate across utilities (25% cf. 1%) or to consolidate water and waste water (23% cf. 1%).

Among those who had switched in the last 12 months, the motivations for looking into switching remain largely unchanged since 2019, and continue to be largely price-related, although significantly fewer mentioned this than was the case in 2019 (45% cf. 52%). One in five (22%) looked into switching because someone got in touch with them, and one in ten because they were dissatisfied with their previous service provider (12%), to get better customer service (11%), to get a higher quality of service (8%), and to consolidate bills for water and waste water (8%).

As with switching, on a spontaneous basis, the motivations for renegotiating remain largely unchanged since 2019, and continue to be largely price-related (49% cf. 62%). One in seven (15%) of those who had renegotiated in the last 12 months started looking into it because someone contacted them, and around one in ten to get a higher quality of service (8%) or because their contract was due to end (9%), or to consolidate bills for water and waste water (7%).

Of the 44% of eligible businesses who said that, in the last 12 months, they had not considered switching or renegotiating, around a third felt there was no point (34% cf. 14% in 2019), a quarter were happy with the current retailer (25% cf. 22%), and one in ten had not got round to it (12% cf. 30%) and felt it was too much effort (10% cf. 18%).

When eligible businesses were asked about what sort of water bill reductions would encourage them to switch, one in five did not know whether they would switch as a result of a bill reduction (22% cf. 19% in 2019), one in seven said they would not switch at all (14% cf. 8% in 2019), and a further one in twenty said they would not switch retailer due to a bill reduction (5% cf. 6% in 2019). Among those who did suggest a percentage reduction, the most commonly mentioned range was 6% to 10% (mentioned by 34%).

When the 81% of eligible businesses who were not aware or had not considered/were not considering switching or renegotiating were asked if there is anything else that would encourage them to switch or renegotiate, three in five (60%) said that there was not. A quarter (25%) mentioned lower prices, and one in ten (8%) providing a good overall service.

2.6 The process of switching or renegotiating

The significant increase in the proportion of those who switched/renegotiated in the last 12 months who report not searching for information about alternative retailers, from 15% in 2019, to 19% in the latest survey, means there has been a significant increase in the proportion of those who switched in the last 12 months who reported receiving no quotations (28% cf. 15%), and a corresponding fall in the proportion getting one quotation (36% cf. 47%). The proportion who received two or more quotations has remained relatively consistent (35% cf. 39%).

While there has been a significant decline in the proportion of re-negotiators who explored what else was on offer with other retailers before they renegotiated (from 63% in 2019 to 47% in the latest survey), nevertheless, it remains the case that re-negotiators were more likely than switchers to approach a number of retailers (80% of re-negotiators approached two or more, as compared to 35% of switchers).

2.7 Arranging a switch

Around two fifths of switchers in the last 12 months were offered a price by their new retailer on a take it or leave it basis (38%) or had a price specified by a broker (41%), an option that was not included in 2019. However, although not directly comparable for this reason, while the proportion who negotiated has remained stable at a fifth (17% cf. 17%), there has been a significant decline in the proportion who controlled the process by running a formal tender process (from 12% in 2019 to 4% in the latest survey), although this does rise to 19% of large organisations. Nevertheless, this is significantly lower than the 53% of large organisations who reported doing so in the 2019 survey.

When those who had switched in the last 12 months were asked whether they had contact with their previous retailer regarding the possibility of a better deal, the pattern of response was very similar to that in 2019, with three quarters saying they had not (78% cf. 76%) and a fifth saying that they had approached their retailer (18% in both instances). However, the already small proportion who reported that their previous retailer approached them prior to switching (6%) has halved to 3%, a significant decline.

2.8 Switching

Significantly fewer of those who switched in the last 12 months arranged the switch through a retailer website or direct contact with a retailer than was the case in 2019 (50% cf. 57%), with 45% arranging it through a broker or consultant (a directional increase on the 39% who did so in 2019).

The great majority of switchers (87%) reported that they found the process of switching retailer either ‘very’ or ‘fairly’ easy. However, the reported overall ease of switching retailer has declined significantly from 93% in 2019 to 87% in the latest survey, and one in ten found it difficult (8%), a significant increase on the 5% who did so in 2019.

While remaining high, satisfaction with the time it took for the switch to take place has also fallen significantly from 90% in 2019 to 85% in the latest survey, driven by a significant decline in the proportion who were very satisfied (from 60% to 51%). However there remains a small proportion who were dissatisfied with the time it took for the switch to take place (8% cf. 6%).

Around one in ten (11%) of those who had switched in the last 12 months reported that they entered into new contracts that were ‘rolling’ with no fixed length. The majority (66%) were less than 3 years in duration, while around a fifth (22%) exceeded three years. Compared to last year, fewer switchers elected to take rolling no fixed term contracts (11% cf. 21%).

The majority (91%) of those who had switched in the last 12 months reported that they had received some form of benefit as a result of switching, which is a significant increase from 2019 results, where 80% of switchers reported that switching had delivered some benefits.

Two thirds (66%) cited lower prices, in line with the 65% who did so in 2019, while there have been significant increases in the proportions mentioning bill consolidation for water and waste water (13% cf. 6%), incentives/cashback (7% cf. 1%), bill consolidation across multiple utilities and online account management services (both 3% cf. 1%).

Eight in ten (80%) customers who did find benefits in switching felt that the benefits met their expectations, in line with 2019 (82%), and one in twenty (6%) felt that they exceeded their expectations, a significant increase on the 3% who did so in 2019.

Three in five (60%) of those who had switched in the last 12 months said that they were better off after switching, a third (31%) were about the same, one in twenty (4%) were worse off, and a similar proportion (5%) said it was too early to tell.

Around one in twenty (6%) of those who had switched in the last 12 months reported receiving new water efficiency or leak detection devices as a result of switching, a significant uplift on the 4% who did so in 2019. This rose to one in six (15%) of medium organisations and a quarter (23%) of large organisations and one in five (21%) of those with 10 or more premises, all significantly higher than the average, with smaller organisations and those with fewer premises much in line with the average.

The proportion of customers who felt that the quality of retail services from their new retailer was better than their previous retailer has increased significantly from 23% in 2019 to 33% in the latest survey, and the proportion who felt it was worse has fallen significantly from 11% to 7%. One in five switchers (6%) felt it was too early to tell (higher than the 3% in 2019), while the majority felt it was about the same (54%, a significant decrease on the 63% in 2019).

Over a third (36%) of those who had switched in the last 12 months with multiple premises have consolidated their water bill across multiple premises in a single bill as a result of switching, in line with the 27% who did so in 2019. One in twenty (5%) have consolidated their water retail services with some of their other utilities, such as electricity, telephone or gas services into a single bill as a result of switching, again in line with the 4% who did so in 2019.

With regard to the time savings achieved as a result of switching, a quarter (27%) of those who had switched in the last 12 months reported that the amount of time their organisation spends dealing with their water bills has reduced, significantly up from the 19% who did so in 2019. The majority continue to report that it has stayed the same (59%), although this is significantly lower than the 67% who did so in 2019.

Four in five of those who had switched in the last 12 months (80%) agreed that it was worthwhile for them to switch, a significant increase since 2019 (69%), driven by a significant increase in those who tend to agree (from 27% to 35%). Correspondingly there has been a significant decrease in the proportion who disagree that this is the case (from 18% to 8%).

2.9 Renegotiating

Over half of re-negotiators in the last 12 months (54%) did so through a retailer website or direct contact with the retailer, and a third (34%) through a broker or consultant.

As for switchers, around one in ten (11%) of those who had renegotiated in the last 12 months reported that they entered into new contracts that were ‘rolling’ with no fixed length. Also similar to switchers, the majority (68%) of new contracts entered into by re-negotiators were less than 3 years in duration, while around a fifth (21%) exceeded 3 years. This pattern of contract duration closely resembles that of last year, and is similar regardless of organisation size.

Concerning potential benefits customers may have received as a result of re-negotiating, the great majority (91%) reported that they had received some form of benefit, with 9% reporting no benefit received, in line with the 11% who did so in 2019, and 1% reporting being worse off. Furthermore, as in 2019, lower prices / bills was the leading benefit cited (72% against 79% in 2019). However significantly more mentioned higher quality service (11% cf. 1%) and incentives/cashback (9% cf. 2%), making these the second and third most mentioned benefits.

Close to nine in ten (87%) of those who had renegotiated in the last 12 months who realised a benefit said that this met their expectations, a significant increase on 2019 (79%), and one in twenty (6%) said their expectations were exceeded. Only 1% said that the benefits did not meet their expectations. These results are much in line with the results among those who had switched in the last 12 months.

Two thirds (65%) of those who had renegotiated in the last 12 months said that they were better off compared to before they renegotiated, three in ten were about the same (30%) were about the same, and just 3% said that they were worse off.

Whereas over one in five (22%) of those who had renegotiated in 2019 said that they had received new water efficiency or leak detection services as a result of renegotiating, this has fallen significantly to less than one in ten (8%) in 2020.

When customers were asked whether the quality of the retail services were better, worse or about the same as before they re-negotiated, the pattern of response was very similar to that seen in 2019, with one in five (22%) saying it was better, seven in ten (69%) that it was about the same, one in twenty (5%) that it was worse, and 3% that it was too early to tell.

Over a quarter (28%) of those who had renegotiated in the last 12 months reported that the time they spent dealing with their water bills had reduced since they renegotiated, and a further six in ten (61%) that it was about the same. Around one in twenty (7%) reported that it had increased, and a similar proportion (5%) that it was too early to tell.

When re-negotiators were asked whether they agreed or disagreed that it was worthwhile for them to renegotiate a better deal with their existing retailer, the pattern of response was similar to that seen in 2019, with a large majority (82%) agreeing, and just one in twenty (7%) disagreeing.

2.10 Contact with water and waste water retailers

Eligible businesses who had not switched in the last 12 months, but who were aware of the changes (who account for 54% of the total sample) were asked whether they had contacted their water or waste retailer in the last 12 months. Close to one in five (18%) of this group had contacted their current water and waste water retailer in the last 12 months, most commonly with a billing enquiry (53%), to ask about other services (18%), about water quality (10%) and about an issue with a meter reading (8%).

A third (34%) of those who had switched in the last 12 months had contacted their previous water and waste water retailer in the 12 months before they moved to their current water and waste water retailer, most commonly with a billing enquiry (68%), about an issue with a meter reading (8%), to find out about switching (6%), to make a complaint (6%), to report a leak (4%), about a sewerage problem (3%) or an issue with a water meter (2%).

Among all eligible businesses who had contacted their water and waste retailer in the last 12 months, in three quarters (77%) of instances the retailer resolved the issue directly, and a further 3% of issues were resolved following redirection to another organisation. However, a fifth (21%) of issues were unresolved, and in most cases (15%) the customer was unaware whether it had been redirected to another organisation or not.

Among those who had switched in the last 12 months, in less than half (44%) of instances the previous retailer resolved the issue directly, and a further one in ten (9%) issues were resolved following redirection to another organisation. Close to half (47%) of the issues with the previous retailer were unresolved, and in most cases (31%) the enquiry was not redirected and remained unresolved.

Among eligible businesses, three in five (61%) customers were satisfied with their contact with their water and waste water retailer, including a third (32%) who were very satisfied. One in six (16%) were dissatisfied, and a quarter (23%) provided a neutral response. Key reasons for dissatisfaction relate to billing services (67%), difficulty in contacting/time taken to get in touch (22%), poor customer service (13%), a lack of resolution (9%), and a failure to deal with the issue/follow up (6%).

Satisfaction with contact with their previous retailer was significantly lower among those who had switched in the last 12 months. Less than a quarter (23%) of this group were satisfied with their contact with their previous water and waste water retailer (cf. 61% pf customers overall), and seven in ten (69%) were dissatisfied (cf. 16% of customers overall), including 53% who were very dissatisfied. Key reasons for dissatisfaction related to billing services (34%), poor customer service (25%), a lack of resolution (18%), , the length of resolution (12%), a lack of communication (12%), difficulty in getting through on the phone (10%), high service charges (8%) and faults in the payment system (8%).

2.11 Overall customer views of the water market

While a reliable water supply remains the most important issue for all eligible businesses, there has been a significant decline in the proportion of customers who mentioned this (57% cf. 72%), as was the case among those who had switched/re-negotiated in the last 12 months (from 62% to 39%) such that this is no longer the most mentioned priority for this group.

There has also been a significant decline in the proportion of eligible businesses who mentioned price (29% cf. 34%), although this was mentioned at higher levels among those who had switched/re-negotiated in the last 12 months (52%), remaining in line with 2019, and making this the most commonly mentioned issue for this group.

Significantly more eligible businesses overall mentioned the quality of customer service (21% cf. 18% in 2019), and this was also the case among those who had switched/re-negotiated in the last 12 months (29% cf. 21%).

There have also been significant increases in the proportion of those who had switched/re-negotiated in the last 12 months who feel the following are important:

- Quality of customer service (29% cf. 21%);
- Quality of billing services (20% cf. 14%);
- Quality or accuracy of meter reading / enhanced metering services (6% cf. 3%);
- Good quality water (3% cf. 0%);
- Good service generally (2% cf. 0%).

It is not possible to directly compare results with 2019 in relation to water efficiency and leakage control, as these were grouped together in 2019, along with enhanced metering services. However, even on a grouped basis, only one in twenty eligible businesses (5%) and a similar proportion of those who had switched/re-negotiated in the last 12 months (3%) mentioned these issues in 2019. Proportions have now increased, with around a quarter of customers overall (25%), and one in ten (8%) of those who had switched/re-negotiated in the last 12 months having mentioned water efficiency as being important to them in the latest survey.

Among eligible businesses, overall satisfaction with the water market as a whole has declined significantly since 2019, from 64% to 60%, driven by a significant decline in the proportion who were very satisfied (23% cf. 29%), and an increase in neutral responses (31% neither/nor cf. 27%) rather than an increase in dissatisfaction (9% in both instances).

Customers in the Severn Trent (71%), Wessex (77%) and Dŵr Cymru (92%)[4] water regions were more satisfied than average with the water market as a whole, while those in the Yorkshire Water region were less satisfied than average (50%).

By industry, those in manufacturing (70%), wholesale/retail/motor trades (71%) and education (76%) were more satisfied than average, while those in accommodation and food services (35%) and health (49%) were less satisfied than average.

Those paying £2,000 or more per annum were significantly less satisfied than average, and only 2% whose annual bill is greater than £100,000 were satisfied, as compared to 28% in 2019, and 90% were dissatisfied.

While the proportion of those who had switched/renegotiated in the last 12 months who were satisfied overall with the water market has declined from 65% in 2019 to 62% in the latest survey, the decline is not significant.

[4] Please note the different market conditions in Wales.

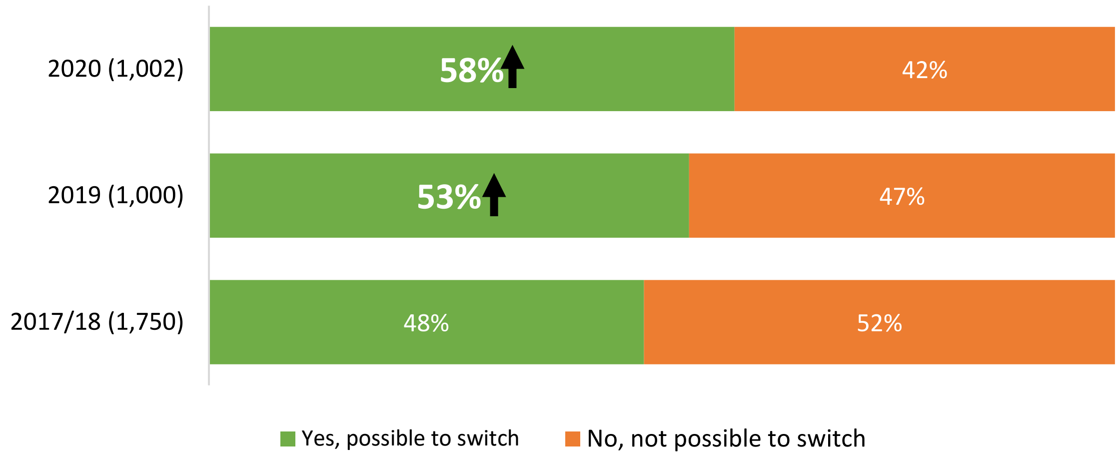
3. Representative survey of eligible non-household customers

3.1 Awareness of changes

Close to three in five (58%) customers were aware, prior to the survey, that since April 2017 organisations have been able to change the company providing their water and waste water retail services or potentially move to a better deal with their existing retailer.

This continues the significant increases that were seen in 2019 as compared to 2017/18, with a further five percentage point increase in the latest survey.

Figure 2: Since April 2017, organisations have been able to change the company providing their water and waste water retail services – that is the company or companies that provide customer services, meter reading and billing – or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?



AR1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicates statistically significant increases over time at the 95% level of confidence

As shown in the figure overleaf, considering this by water region indicates that customers in the Anglian region were significantly more likely than average to be aware of the changes (76%), as was the case in 2019. By contrast, those in the United Utilities (48%), Dŵr Cymru (11%)[5] and Yorkshire (40%) water regions were significantly less likely than average to be aware of the changes.

Reflecting their higher levels of activity in the market, those in manufacturing and health (both 78%) were more likely than average to be aware of the changes.

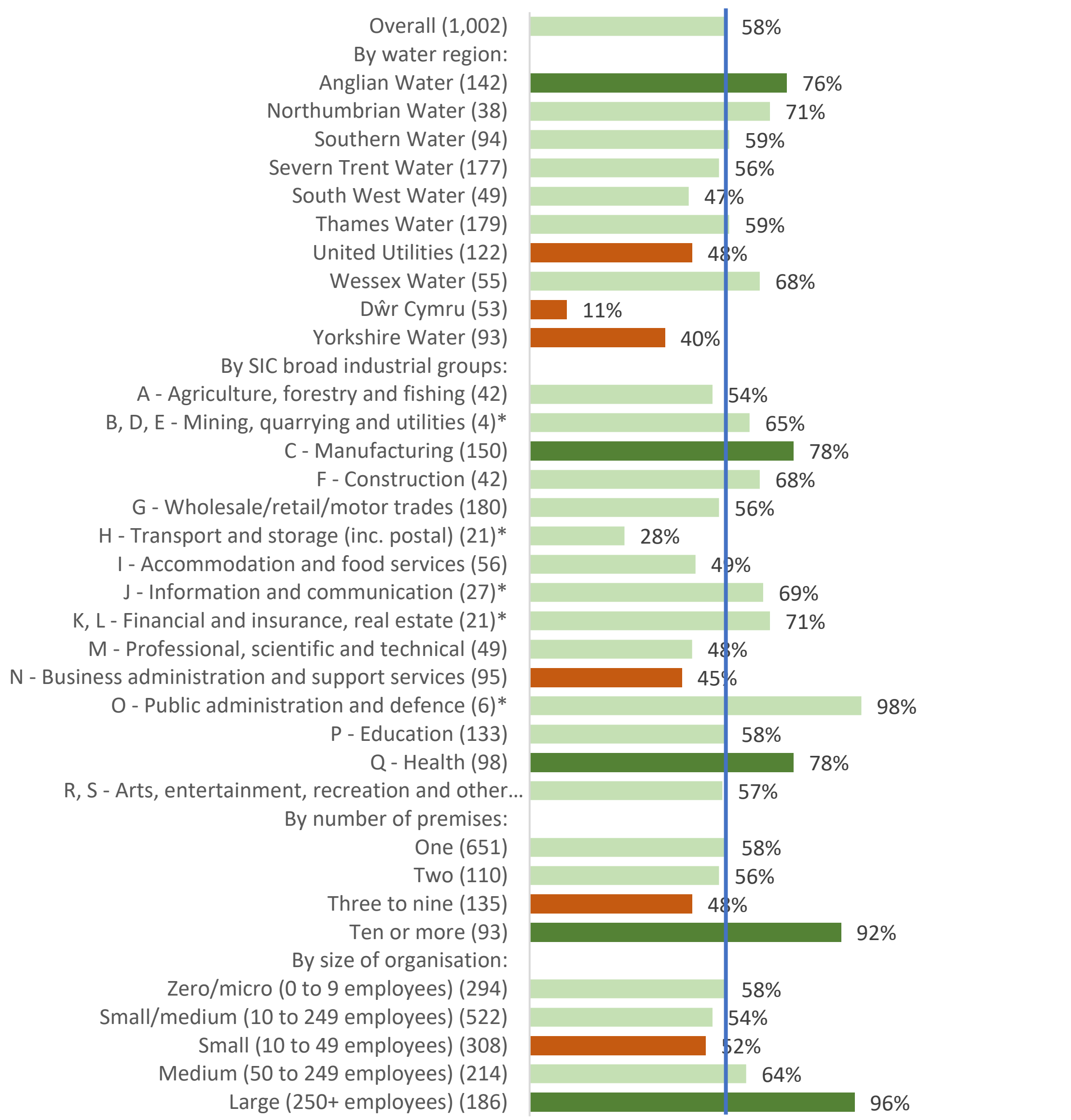
Large organisations (250+ employees) were more likely than average to be aware of the changes (96%), with awareness among this group returning to the levels seen in 2017/18 (89%), after a dip in 2019 (65%). Among small and medium organisations (10 to 249 employees), while awareness was in line with the average (54% cf. 58%), this represents a significant decline on the 61% who were aware in 2019. If this is broken down to medium

[5] Please note the different market conditions in Wales.

organisations (50 to 249 employees), awareness rises to 64%, but this remains in line with the average.

While organisations with 3 to 9 premises remain less likely than average to be aware of the changes (48%), those with 10 or more premises were both significantly more likely than average, and more likely than was the case in 2019, to be aware (92% compared to 58% and 45% respectively).

Figure 3: Since April 2017, organisations have been able to change the company providing their water and waste water retail services – that is the company or companies that provide customer services, meter reading and billing – or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?



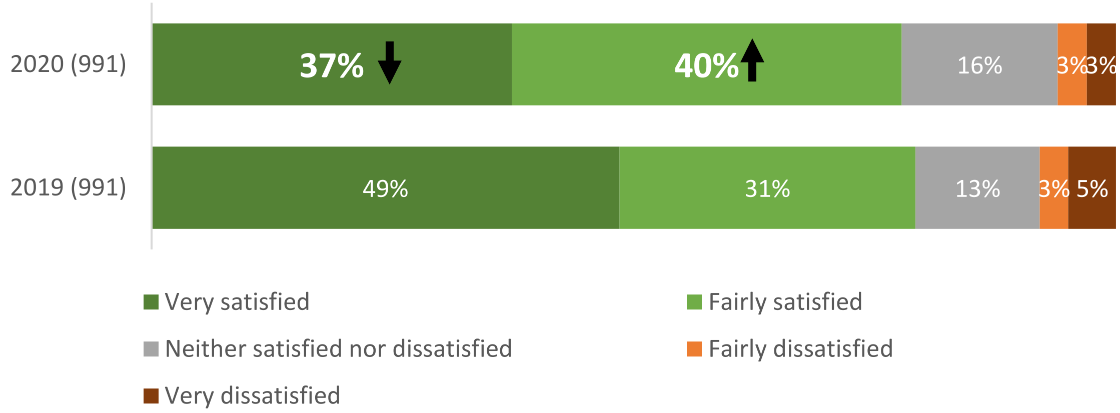
AR1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Green shading indicates result is significantly higher than the average at the 95% level of confidence
Orange shading indicates result is significantly lower than the average at the 95% level of confidence
*indicates caution: low base (<30)

3.2 Overall satisfaction

Overall, close to four in five (78%) reported satisfaction with their current water and waste water retailer, which is in line with the 80% who did so in 2019. Within this, significantly fewer were very satisfied (37% cf. 49%) and significantly more fairly satisfied (40% cf. 31%).

Levels of dissatisfaction have remained low at 6% (cf. 8% in 2019).

Figure 4: Overall, how satisfied or dissatisfied are you with your current water and waste water retailer(s)?



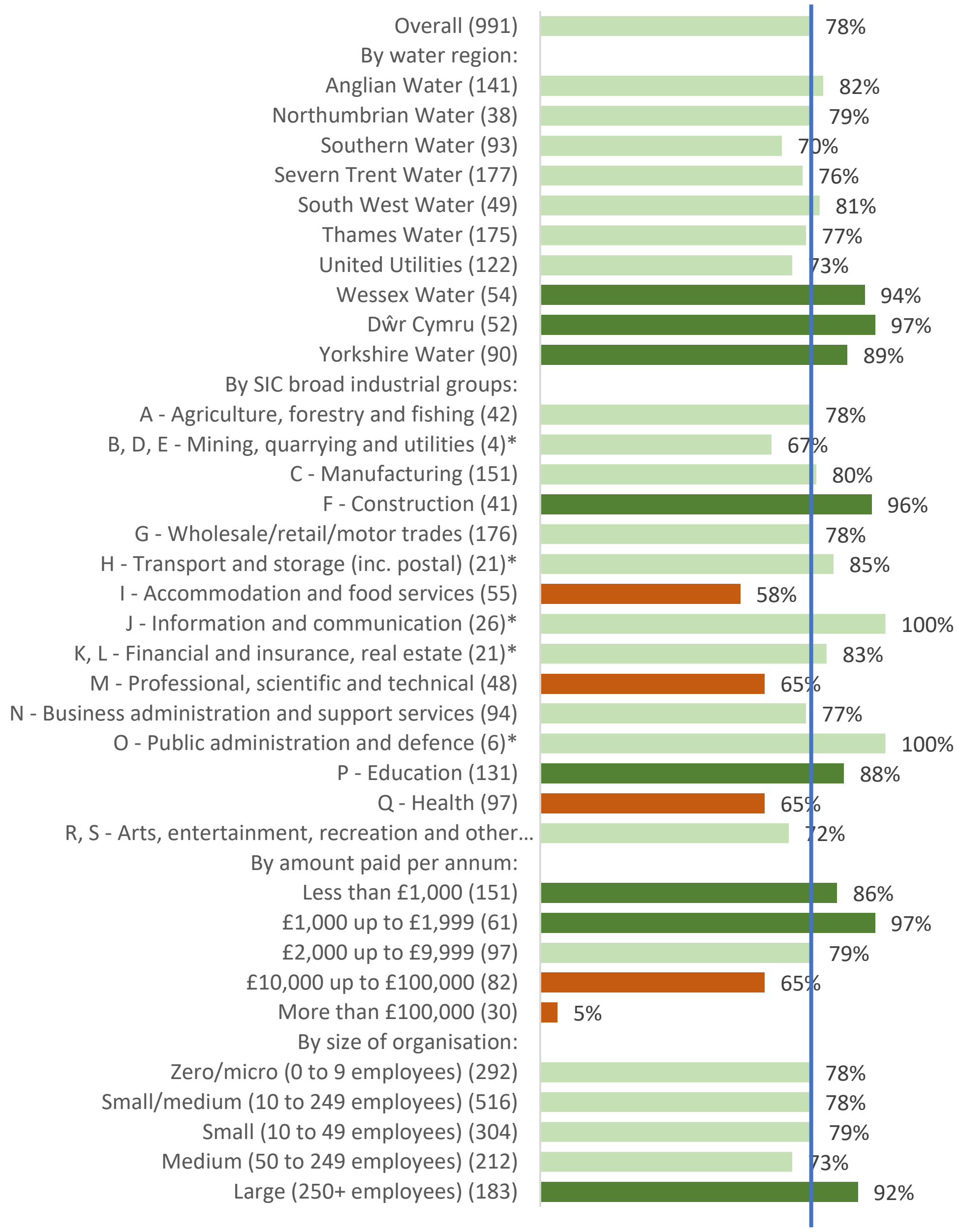
C1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicates statistically significant changes over time at the 95% level of confidence

By industry, those in construction industries (96%) and those in education (88%) were more satisfied than average. By contrast, those in accommodation and food services (58%) and those in health and professional, scientific and technical industries were less satisfied than average (65% in both instances).

Those paying annual bills of less than £2,000 were more satisfied than average, while those paying annual bills of £10,000 or more were more likely than average to be dissatisfied, as was the case in 2019.

By organisation size, those with 250 or more employees were more satisfied than average (92%), while satisfaction was relatively consistent among smaller organisations.

Figure 5: Overall, how satisfied or dissatisfied are you with your current water and waste water retailer(s)? (% satisfied)

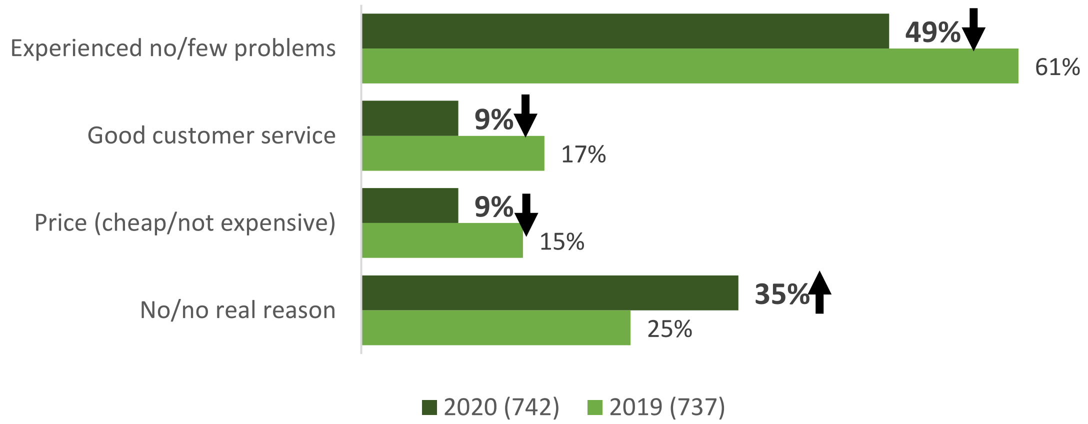


C1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Green shading indicates result is significantly higher than the average at the 95% level of confidence
Orange shading indicates result is significantly lower than the average at the 95% level of confidence
*indicates caution: low base (<30)

Where customers were satisfied, the main reason was because they had experienced no/few problems (49%), although significantly fewer mentioned this than was the case in 2019 (61%).

A third (35%) gave no specific reason for their satisfaction (significantly more than the 25% who did so in 2019), and significantly fewer mentioned good customer service (9% cf. 17%) and price (9% cf. 15%).

Figure 6: Are there any particular reasons why you are satisfied? What are they?

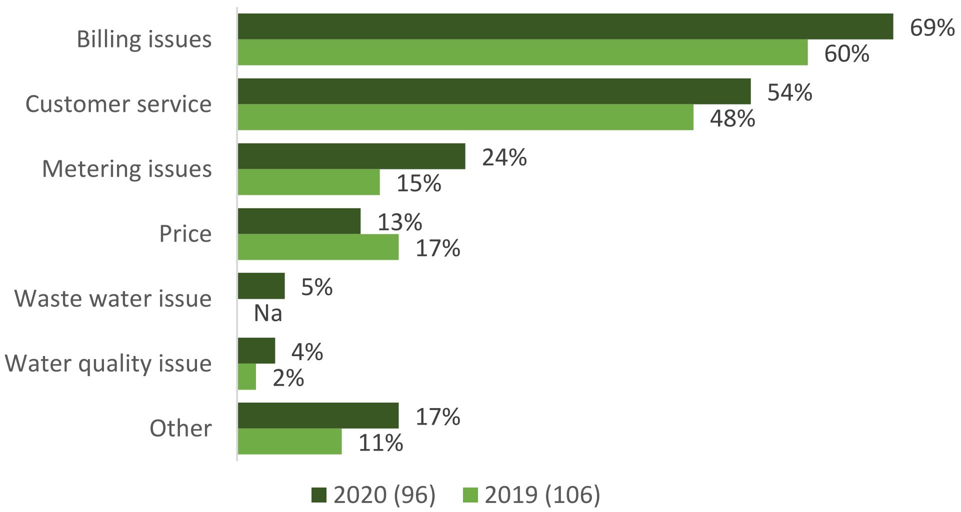


C3 Base: All satisfied representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Mentions over 2%
Arrows indicate statistically significant changes over time at the 95% level of confidence

The main reasons for dissatisfaction with their current water and waste water retailer were billing issues (69%) and customer service issues (54%), although these remain in line with 2019 (60% and 48% respectively), which saw a significant decrease since the 2017/18 survey.

Generally the pattern of responses was very similar to 2019, with metering issues (24%) and pricing issues (13%) also coming through as sources of dissatisfaction.

Figure 7: Why are you dissatisfied?



C2 Base: All dissatisfied representative customers (excluding don't know/refused – unweighted base sizes in parentheses)

Among those aware of the changes, there has been a significant increase who feel that there have been no positive or negative changes in the water retail services they receive, from 86% in 2019 to 94% in the latest survey. This is significantly higher than the 82% of those who had been active in the market in the last 12 months who feel this is the case.

A similar proportion reported negative changes as was the case in 2019 (3% cf. 5%), and among this group (20 respondents) the difficulty of/how confusing it is to change retailer (62%), increases in price (20%) and issues with billing (18%) were the most commonly mentioned changes. Approximately one in ten mentioned difficulties in getting in touch (12%), and one in twenty mentioned issues with customer service (6%).

Significantly fewer customers reported positive changes than was the case in 2019 (3% cf. 9%), and among this group (16 respondents) simplified billing processes (51%), lower prices (28%) and better service (15%) were the most commonly mentioned improvements.

However, among those who had been active in the last 12 months, over one in ten (12%) felt there had been positive changes.

3.3 Market engagement

For the purposes of the analysis, those who have switched or renegotiated, those who are in the process of or actively considering switching/renegotiating, those who had tried to switch/renegotiate but could not, and those who considered switching/renegotiating but decided not to, all within the last 12 months, have been grouped into a category of 'active customers'.

Around one in twelve (7.82%) customers can be classified as active on this basis.

While not directly comparable with the 2019 results, where consideration of switching/renegotiating and failed attempts to switch referred to an organisation's status since market opening (approximately a two year period), rather than the last 12 months, this represents a directional decrease on the 9.8% who were active in 2019.

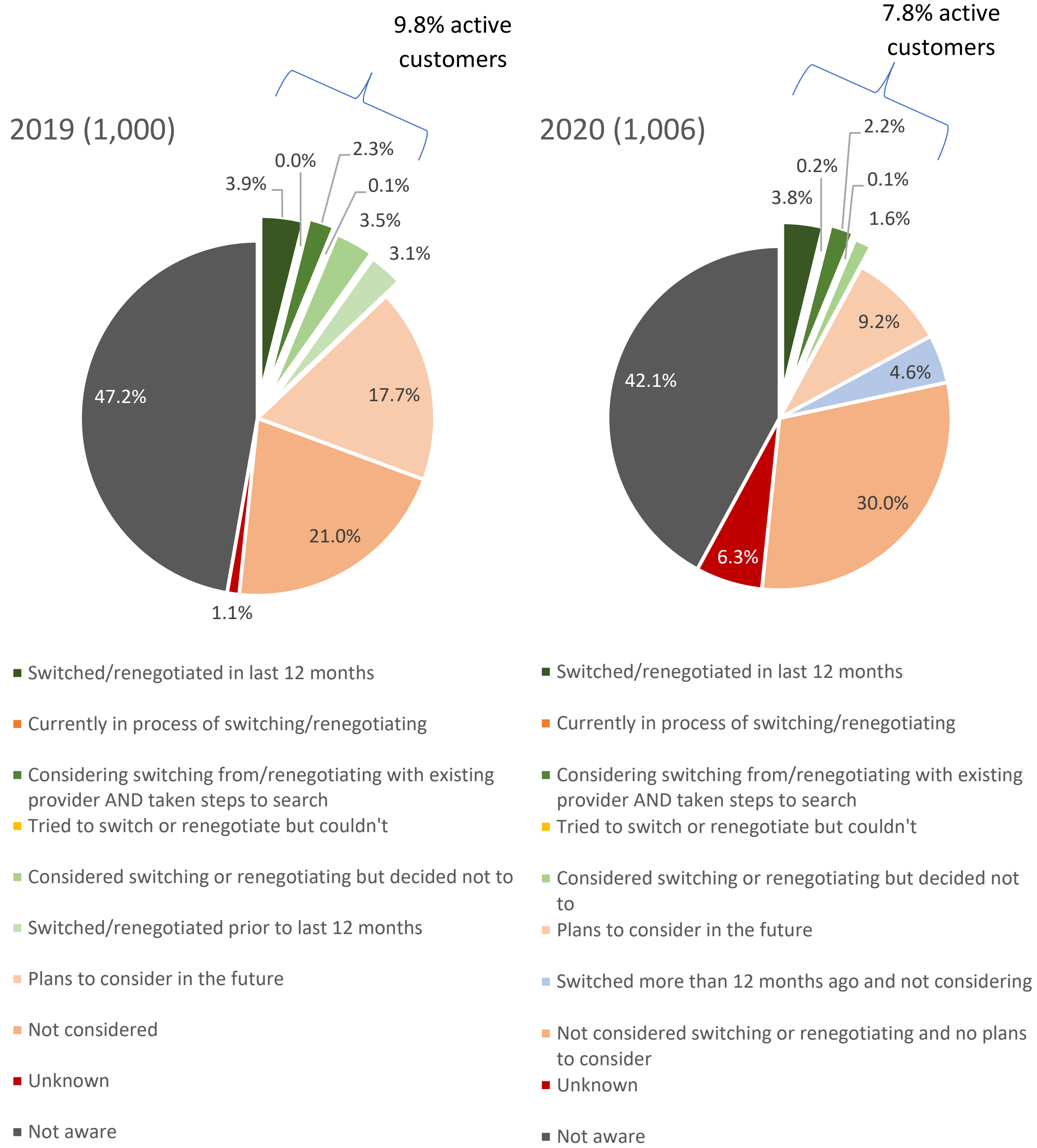
The proportion who switched/renegotiated within the last 12 months has remained stable at 3.8% (cf. 3.9% in 2019).

Few (2.2%) had considered switching/renegotiating and taken steps to search in the last 12 months, which compares with the 2.3% who had done so since market opening in 2019.

The proportion who had considered but decided not to switch/renegotiate in the last 12 months stands at 1.6%, which is significantly lower than the 3.5% who had done so since market opening in 2019.

Similarly, significantly fewer reported planning to consider switching/renegotiating in future (9.2% cf. 17.7%), while significantly more reported no consideration of switching/renegotiating (34.6% cf. 21.0%). This figure breaks down as 30.0% that have not considered switching/renegotiating and have no plans to do so and 4.6% that have switched/renegotiated more than 12 months ago and have not considered doing so in the last 12 months.

Figure 8: Market engagement



AR1/DR1/DR4/G1 Base: All representative customers (unweighted base sizes in parentheses)
Aggregate figures are subject to summation discrepancies even at the level of one-decimal point

NB: 2020 results are not directly comparable with the 2019 results, where consideration of switching/renegotiating and failed attempts to switch referred to an organisation's status since market opening rather than the last 12 months.

For this reason, those who switched prior to the last 12 months in the 2020 survey are included within other categories. This group represents 8.0% of all eligible customers.

Overall, 1.4% of customers had switched in the last 12 months and 2.4% had renegotiated, giving just less one in twenty (3.8%) who had done either in the last 12 months.

This pattern was very similar regardless of organisation size, unlike the 2019 results which showed that close to one in five (17%) large organisations had switched or renegotiated in the last 12 months.

However, medium and large organisations (50 or more employees) were significantly more likely than average to have been active at all in the last 12 months (15.8% of those with 50 to 249 employees, and 25.7% of those with 250+ employees).

Table 4: Switched/renegotiated or active within the last 12 months by organisation size

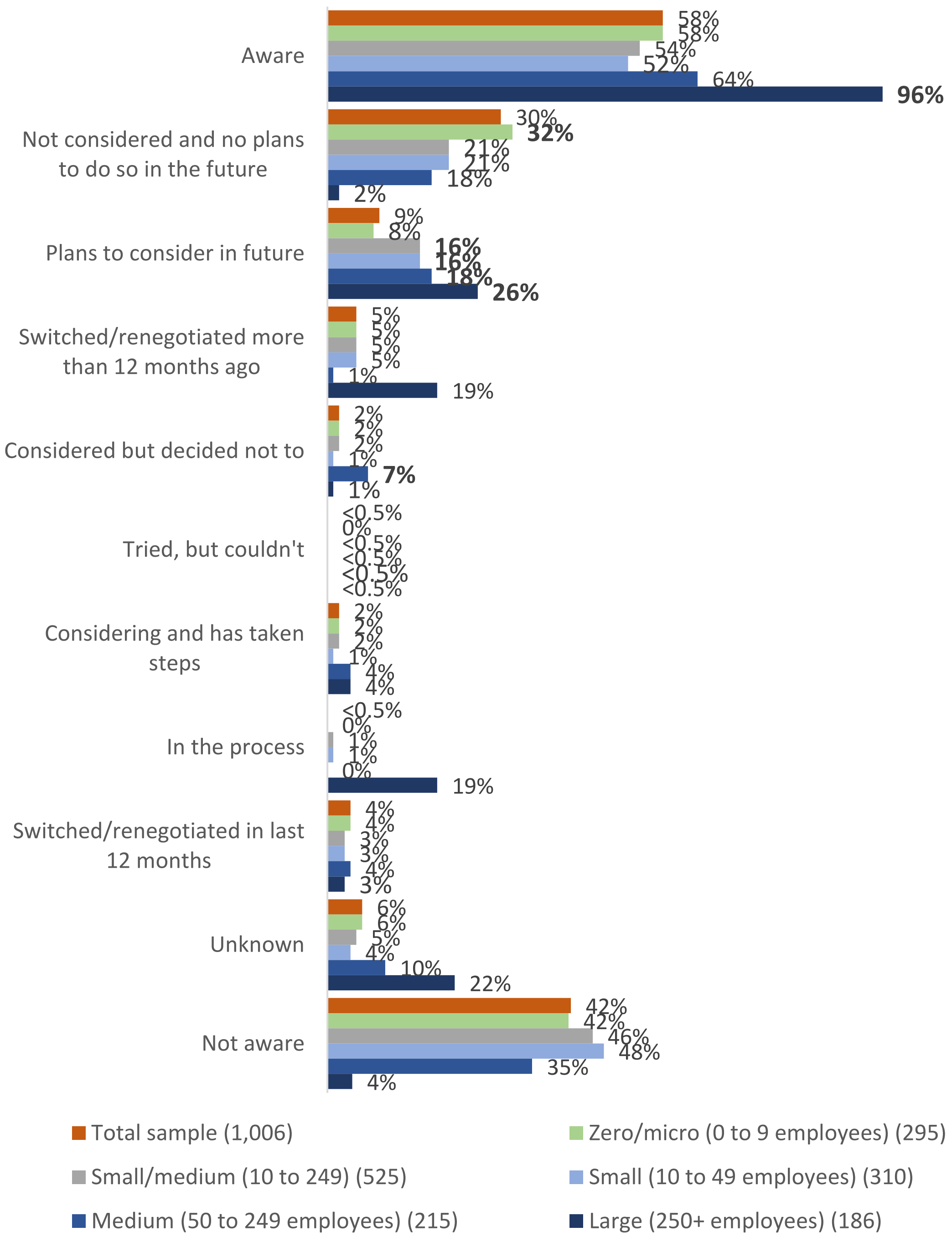
Row percentages	Switched in the last 12 months	Renegotiated in last 12 months	Switched or renegotiated in last 12 months	Active in last 12 months
Total sample (1,006)	**1.4%**	**2.4%**	**3.8%**	**7.8%**
Zero/micro (0-9 employees) (295)	1.3%	2.6%	4.0%	7.7%
Small/medium (10-249) employees (525)	2.1%	1.2%	3.1%	7. 8%
Of which:				
Small (10-49 employees) (310)	1.9%	1.2%	3.0%	6.3%
Medium (50-249 employees) (215)	3.1%	1.1%	3.7%	**15.8%** ↑
Large (250+ employees) (186)	2.0%	0.8%	2.6%	**25.7%** ↑

DR1/DR4 Base: All representative customers (unweighted base sizes in parentheses)
Arrows indicate statistically significant difference from the average at the 95% level of confidence

The figure below shows how market engagement varied by organisation size, and further demonstrates the greater levels of awareness among large organisations (96%). It also highlights that the higher levels of activity among large organisations discussed above were driven by around one in five (19%) of large organisations who were currently in the process of switching or renegotiating. Large organisations were also more likely than average to be planning to consider switching or renegotiating in future (26% cf. 9%) and to have switched more than 12 months ago and thus, have not considered switching again in the last 12 months (19% cf. 5%)[6].

[6] It should be noted that the 2020 results focus on activity in the market in the last 12 months, so those who switched more than 12 months ago are also included in other categories in the figure below on the basis of their activity in the last 12 months.

Figure 9: Market engagement by organisation size

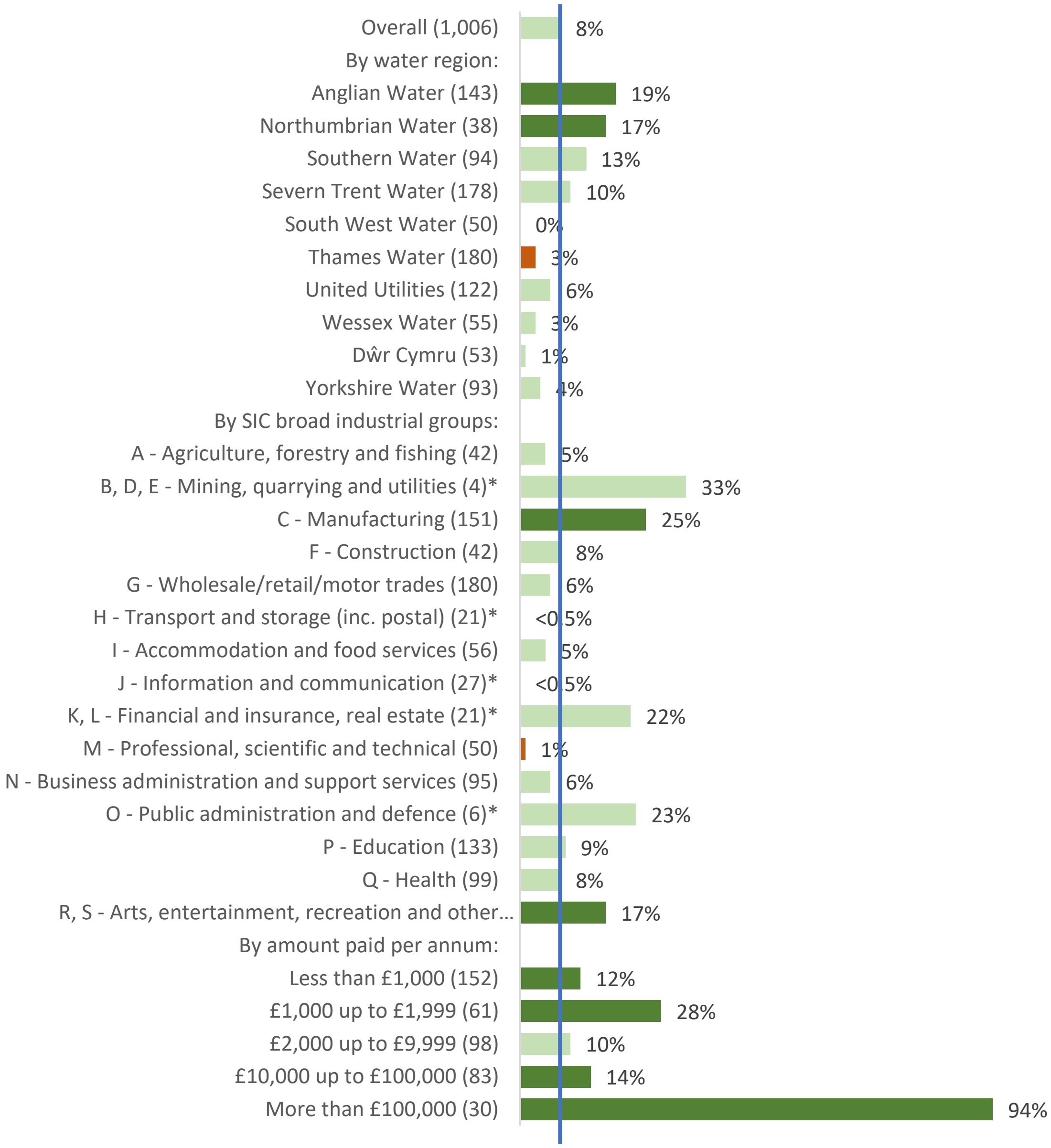


AR1/DR1/DR4/G1 Base: All representative customers (unweighted base sizes in parentheses)
Figures in bold indicate statistically significant difference from the average at the 95% level of confidence

As shown in the figure below, considering the level of active customers by sub-group, there were significantly more than average active customers in the last 12 months in the Anglian (19%) and Northumbrian (17%) water regions, and significantly less in the Thames (3%) water region. By industry, those in manufacturing (25%) and arts, entertainment, recreation and other (17%) were more likely to be active customers, and those in the professional, scientific and technical industries (1%) less so.

It is of note that 94% of those paying more than £100,000 have been active in some way in the last 12 months.

Figure 10: Active customers in the last 12 months by sub-group



DR1/DR4/G1 Base: All representative customers (valid responses – unweighted base sizes in parentheses)
Green shading indicates result is significantly higher than the average at the 95% level of confidence
Orange shading indicates result is significantly lower than the average at the 95% level of confidence
*indicates caution: low base (<30)

3.4 Searching and comparing

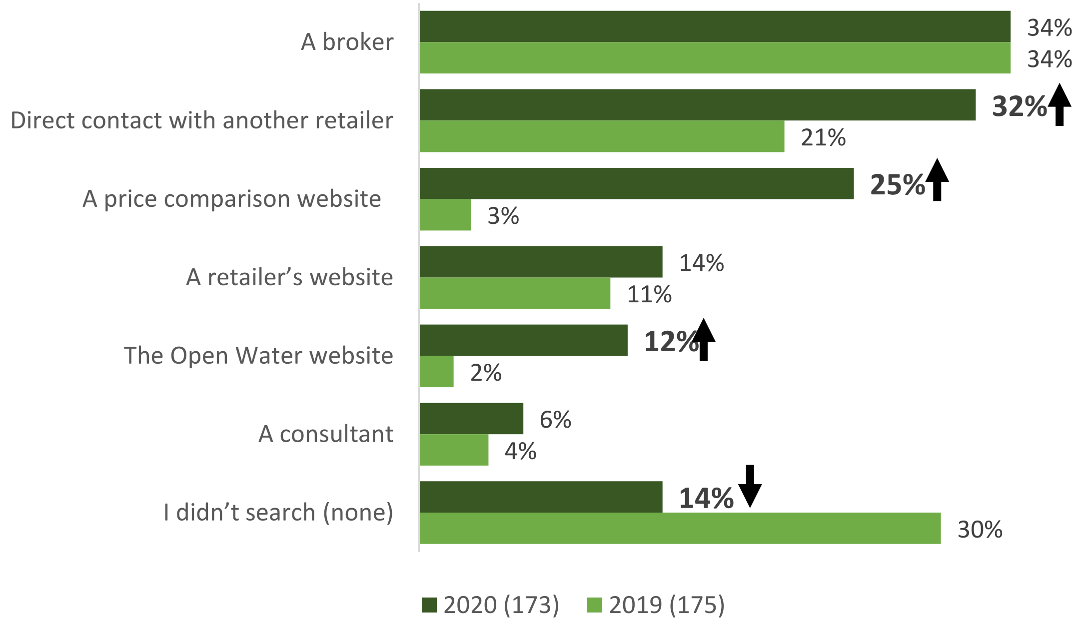
Of those eligible business customers who had switched or renegotiated or considered doing this, 86% used at least one source to search for information about alternative retailers (significantly more compared to the 70% who did so in 2019). This figure fell to 77% of those who have been active in the last 12 months, with significantly fewer than average reporting use of retailer websites (9%), price comparison websites (12%) and brokers (23%).

There has been a particularly significant increase in the proportion of all eligible business customers who had switched, renegotiated or considered doing this who sourced information from a price comparison website, from 3% in 2019 to a quarter (25%) in the latest survey.

Other sources of information driving the overall increase in searching for information were direct contact with a retailer (from 21% in 2019 to 32% in the latest survey), and the Open Water website (from 2% to 12%).

Around a third continued to report using a broker (34% in both instances), and around one in twenty continued to report using a consultant (6% cf. 4%).

Figure 11: Which of the following, if any, have you used to search for information about alternative retailers?



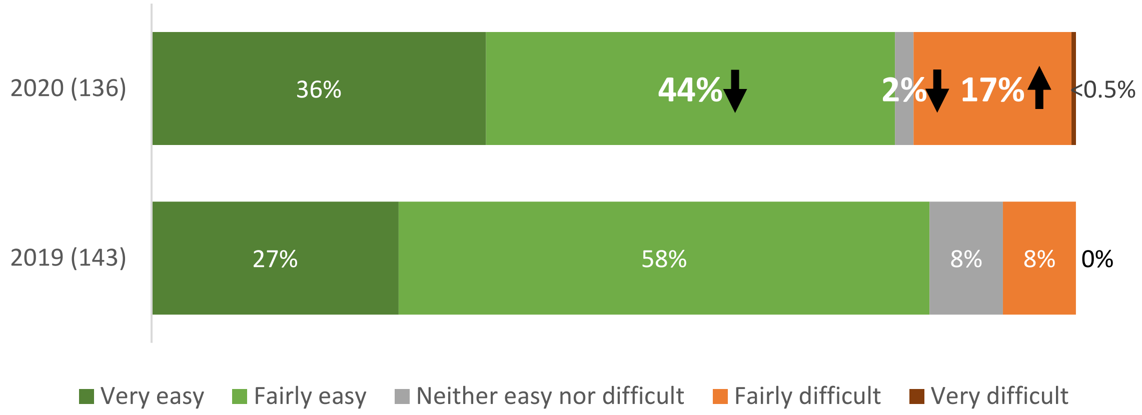
H1 Base: All representative customers who have switched/renegotiated or considered doing so (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Of the 24 customers who reported using a price comparison website, 18 said they had used one which listed quotes from different retailers, and 17 said the they had put in details for a tailored quote.

While the overall proportion of customers who found it easy to find the information they needed to make an informed choice is in line with that seen in 2019 (80% cf. 85%), within this directionally more customers found it 'very' rather than 'fairly easy'.

However, there has also been a significant increase in the proportion who found it difficult, from 8% in 2019 to 17% in 2020.

Figure 12: How easy or difficult was it for you to find the information you felt like you needed to make an informed choice?

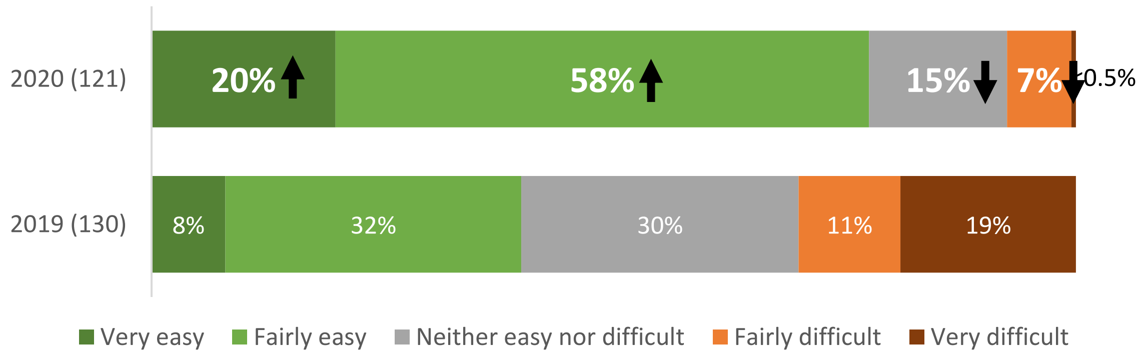


H3 Base: All representative customers who searched for information on different retailers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Of the 16 customers who found it difficult to find the information they needed to make an informed choice, 12 said that they didn't know where to go, 3 that the information was not available via their preferred communication method, 2 that the information they found was not clear, and 1 that they didn't know enough about the new market.

Reflecting the increased use of price comparison websites, there has been a very large and significant increase in the proportion of customers who found it easy to compare different retailers, from 40% to 78%, with corresponding decreases in those giving a neutral response (from 30% to 15%) and those finding it difficult (from 30% to 7%).

Figure 13: How easy or difficult was it to compare different retailers?

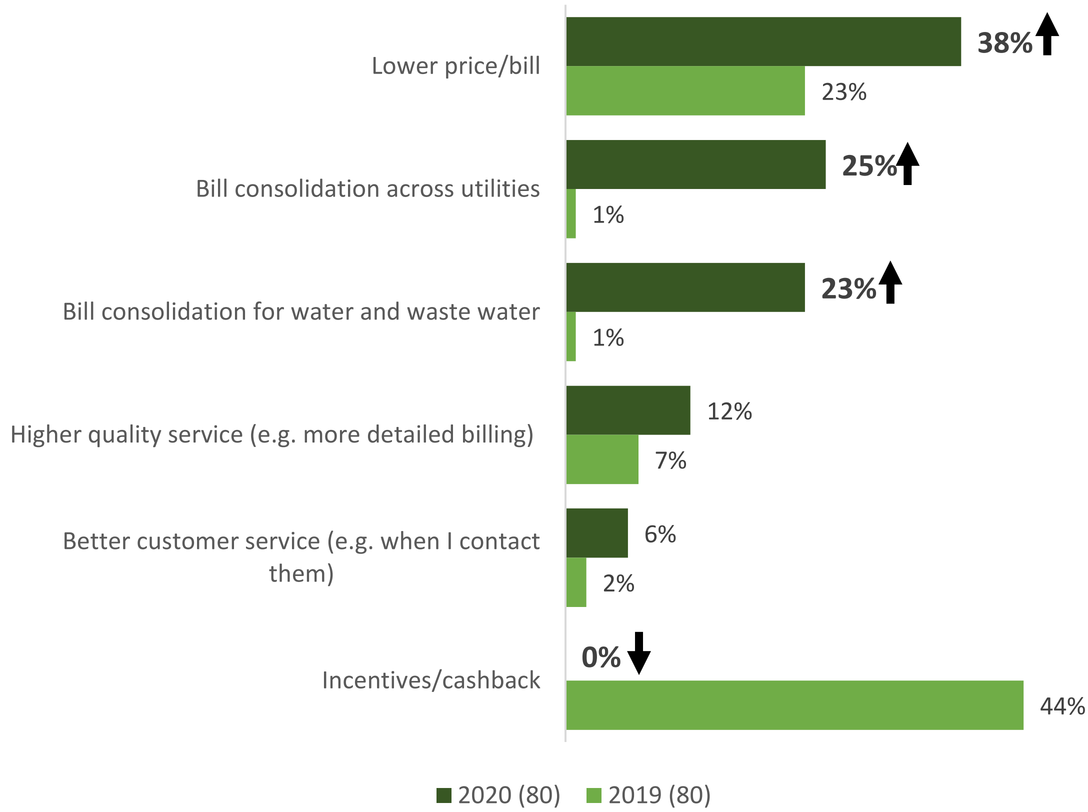


H5 Base: All representative customers who searched for information on different retailers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Of the 6 customers who found it difficult to compare different retailers, half said it was because the information was not available via their preferred method of communication.

Among customers who had actively looked into switching or renegotiating in the last 12 months, but who hadn't switched or renegotiated (c.3% of customers), the reasons for starting to look into it have switched from incentives/cashback (0% cf. 44%) and very much towards cost (38% cf. 23%) and consolidation, either to consolidate across utilities (25% cf. 1%) or to consolidate water and waste water (23% cf. 1%).

Figure 14: In the last 12 months why did you start looking into switching or renegotiating?



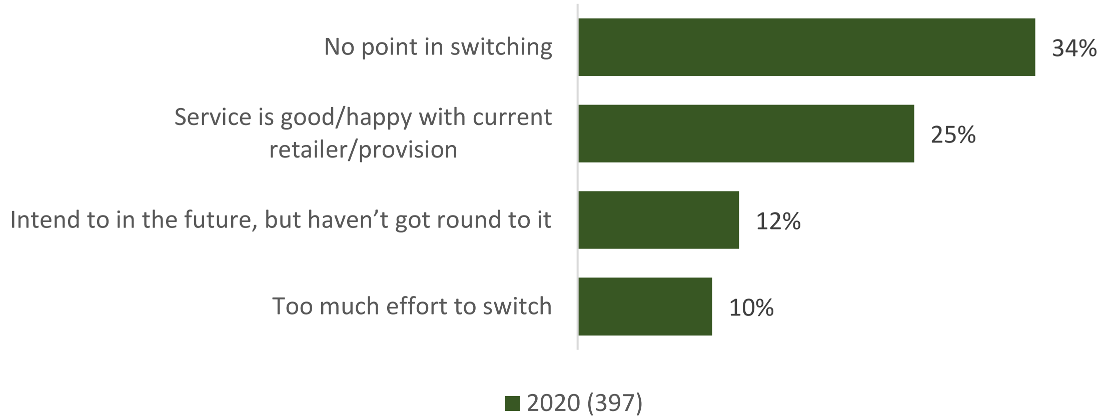
H9 Base: All representative customers actively looking into switching or renegotiating (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Of the 16 customers who had considered switching or renegotiating and decided not to, 10 said it was too much effort, 4 that the savings were insufficient, and 3 that there were no other benefits to be gained.

3.5 Non-switching customers

Of the 44% of customers who said that, in the last 12 months, they had not considered switching or renegotiating, around a third felt there was no point (34% cf. 14% in 2019), a quarter were happy with the current retailer (25% cf. 22%), and one in ten had not got round to it (12% cf. 30%) and felt it was too much effort (10% cf. 18%).

Figure 15: Why have you not yet considered switching retailer or renegotiating with you existing retailer in the last 12 months?



H7 Base: All representative customers who plan to switch or renegotiate in future or have not considered (excluding don't know/refused – unweighted base sizes in parentheses)

3.6 Water bill reductions

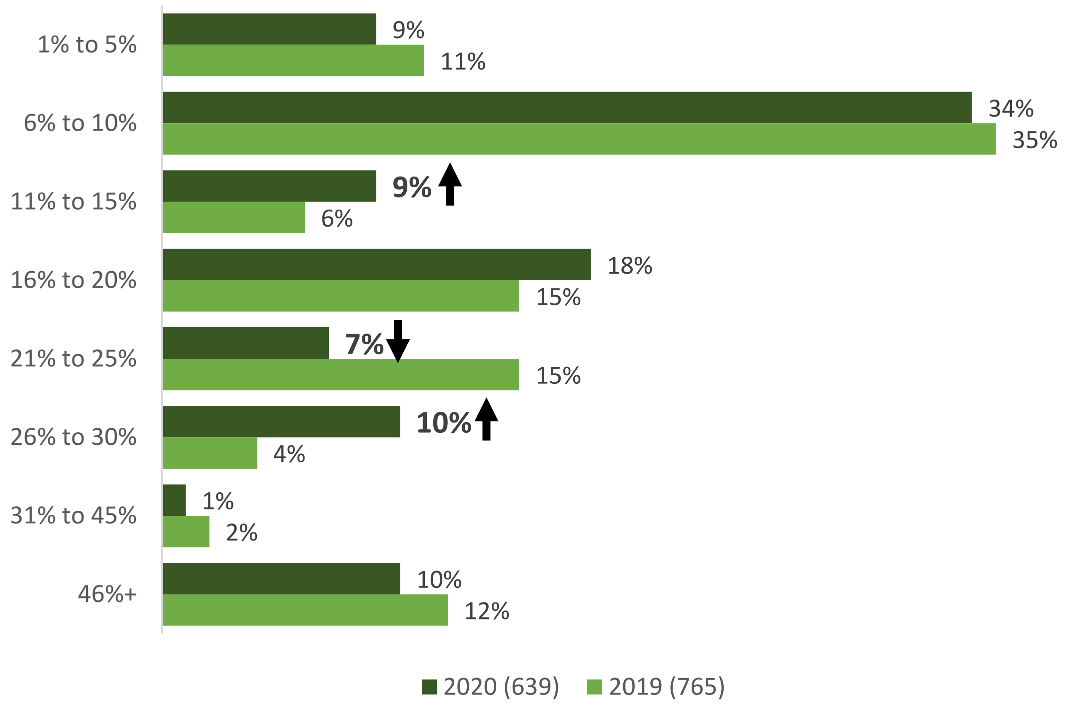
When customers were asked about what sort of water bill reductions would encourage them to switch, one in five did not know whether they would switch as a result of a bill reduction (22% cf. 19% in 2019), one in seven said they would not switch at all (14% cf. 8% in 2019), and a further one in twenty said they would not switch retailer due to a bill reduction (5% cf. 6% in 2019).

Among those who did suggest a percentage reduction, around one in ten (9%) mentioned a figure of up to 5%, in line with the 11% who did so in 2019, and a third (34%) mentioned a figure of between 6% and 10%, again in line with 2019 (35%).

One in ten (9%) mentioned a figure of 11% to 15% and one in five (18%) mentioned a range of 16% to 20%.

Generally the pattern of results was similar to 2019.

Figure 16: In percentage terms, what level of annual water bill reduction would encourage you to switch or consider switching retailer?



H14 Base: All representative customers who would consider switching for a reduction (excluding don't know/would not consider for a reduction/ would not consider switching – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

When organisations whose water and waste water bills account for more than 5% of running costs were asked what percentage reduction would encourage then to switch, they were more likely than those whose bills accounted for a smaller proportion of running costs to mention a reduction of 1 to 5% (30% cf. 8%).

When customers who were not aware or had not considered/were not considering switching or renegotiating were asked if there is anything else that would encourage them to switch or renegotiate, three in five (60%) said that there was not.

A quarter (25%) mentioned lower prices, and one in ten (8%) providing a good overall service. Other aspects were mentioned by 2% or fewer.

3.7 Contact with water and waste water retailers[7]

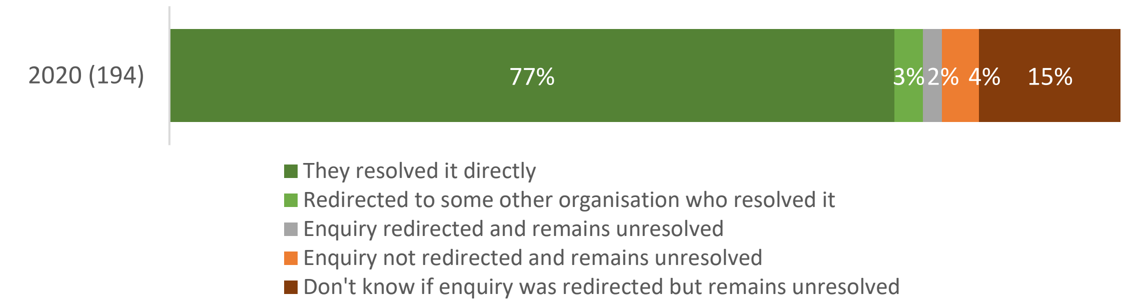
Customers who had not switched in the last 12 months, but who were aware of the changes (who account for 54% of the total sample) were asked whether they had contacted their water or waste retailer in the last 12 months.

Close to one in five (18%) of this group had contacted their current water and waste water retailer in the last 12 months, most commonly with a billing enquiry (53%), to ask about other services (18%), about water quality (10%) and about an issue with a meter reading (8%).

In three quarters (77%) of instances the retailer resolved the issue directly, and a further 3% of issues were resolved following redirection to another organisation.

However, a fifth (21%) of issues were unresolved, and in most cases (15%) the customer was unaware whether it had been redirected to another organisation or not.

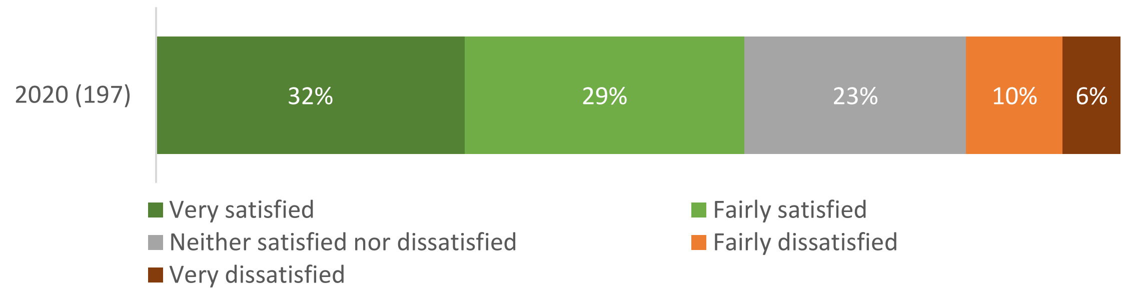
Figure 17: Were they able to resolve your enquiry, or did they redirect you to another organisation?



IR3 Base: All representative customers who contacted their provider in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

Three in five (61%) customers were satisfied with their contact with their water and waste water retailer, including a third (32%) who were very satisfied. One in six (16%) were dissatisfied, and a quarter (23%) provided a neutral response.

Figure 18: How satisfied or dissatisfied were you with the contact with your water and waste water retailer overall?



IR4 Base: All representative customers who contacted their provider in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

[7] Question wording for this section has changed so comparisons with 2019 are not appropriate.

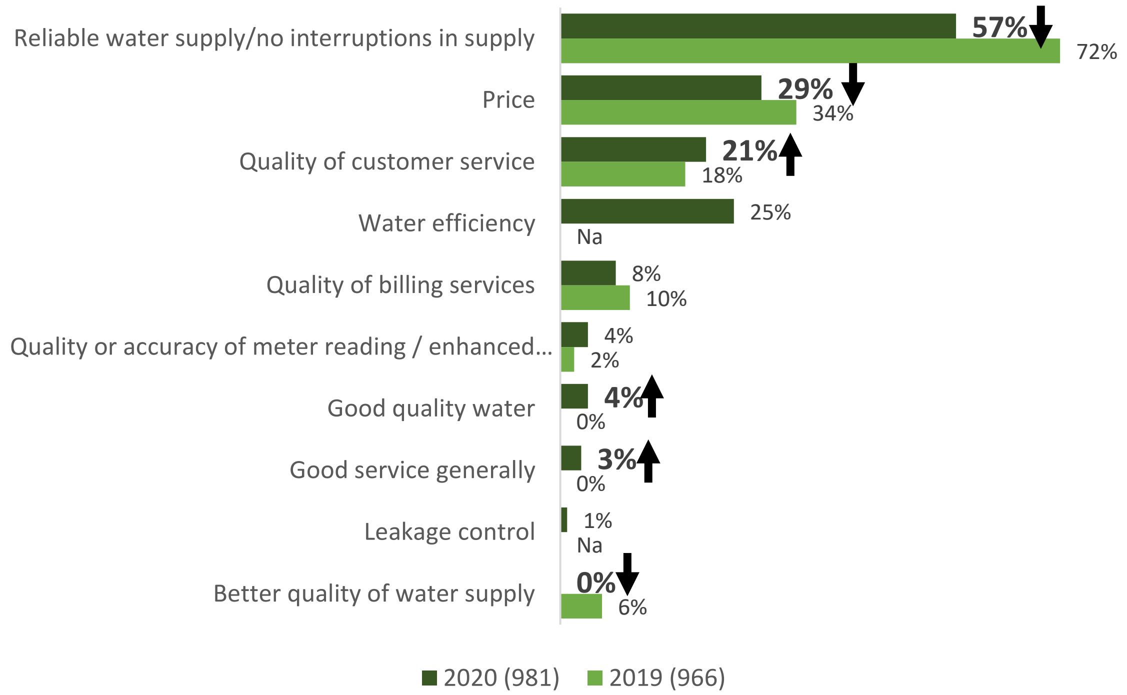
Key reasons for dissatisfaction relate to billing services (67%), difficulty in contacting/time taken to get in touch (22%), poor customer service (13%), a lack of resolution (9%), and a failure to deal with the issue/follow up (6%).

3.8 Overall customer views of the water market

3.8.1 Most important issues for water customers

While a reliable water supply remains the most important issue for customers, there has been a significant decline in the proportion of customers who mentioned this (57% cf. 72%), as is also the case in relation to price (29% cf. 34%). By contrast, significantly more customers mentioned the quality of customer service (21% cf. 18%).

Figure 19: Overall, and taking everything into account, what is important to you as a water customer?



J1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

It is not possible to directly compare results with 2019 in relation to water efficiency and leakage control, as these were grouped together in 2019, along with enhanced metering services. However, even on a grouped basis, only one in twenty (5%) mentioned these issues in 2019, while a quarter (25%) mentioned water efficiency specifically in the latest survey.

However, it is noteworthy that, while the pattern of response was relatively similar for organisations with up to 249 employees in this respect, only one in twenty (4%) large organisations mentioned water efficiency as one of the most important issues.

By contrast, large organisations were significantly more likely to mention the quality of customer service (88%), price (67%) and quality of billing services (64%).

Table 5: Overall, and taking everything into account, what is important to you as a water customer? (by organisation size)

	Total (991)	Zero/ micro (0-9 employees) (289)	Small/ medium (10-249 employees) (520)	Small (10-49 employees) (309)	Medium (50-249 employees) (211)	Large (250+ employees) (182)
Reliable water supply/no interruptions in supply	57%	57%	54%	55%	51%	53%
Price	29%	29%	31%	32%	26%	**67%** ↑
Water efficiency	25%	24%	**30%** ↑	**32%** ↑	20%	**4%** ↓
Quality of customer service	21%	21%	19%	18%	**28%** ↑	**88%** ↑
Quality of billing services	8%	**7%** ↓	**12%** ↑	**11%** ↑	**16%** ↑	**64%** ↑
Quality or accuracy of meter reading / enhanced metering services	4%	4%	5%	5%	**9%** ↑	3%

J1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant difference from the average at the 95% level of confidence

Reflecting the high degree of correlation between organisation size and number of premises (86% of large organisations have 11 or more premises), this pattern is also evident as the number of premises increases, as shown below.

Table 6: Overall, and taking everything into account, what is important to you as a water customer? (by bill size)

	Total (991)	Single site (643)	2 sites (110)	3-10 sites (133)	11+ sites (93)
Reliable water supply/no interruptions in supply	57%	**59%** ↑	**29%** ↓	**69%** ↑	**39%** ↓
Price	29%	**30%** ↑	24%	**10%** ↓	**66%** ↑
Water efficiency	25%	**26%** ↑	**15%** ↓	**11%** ↓	**6%** ↓
Quality of customer service	21%	**20%** ↓	**32%** ↑	20%	**77%** ↑
Quality of billing services	8%	**6%** ↓	**18%** ↑	**23%** ↑	**50%** ↑
Quality or accuracy of meter reading / enhanced metering services	4%	**3%** ↓	**13%** ↑	7%	4%

J1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant difference from the average at the 95% level of confidence

This pattern is also evident as bill sizes increase, but over and above this pattern, those with bills over £100,000 (30 organisations) almost universally mentioned a reliable water supply (96%) and the quality of billing services (90%), and over four in five (86%) mentioned the quality or accuracy of meter readings or an enhanced metering service.

Table 7: Overall, and taking everything into account, what is important to you as a water customer? (by bill size)

	Total (991)	Less than £1,000 (151)	£1,000 up to £1,999 (61)	£2,000 up to £9,999 (98)	£10,000 up to £100,00 (82)0	More than £100,000 (30)
Reliable water supply/no interruptions in supply	57%	63%	60%	**44%** ↓	64%	**96%** ↑
Price	29%	25%	**53%** ↑	**53%** ↑	**58%** ↑	**5%** ↓
Water efficiency	25%	29%	21%	**11%** ↓	**7%** ↓	**1%** ↓
Quality of customer service	21%	18%	**41%** ↑	21%	**41%** ↑	10%
Quality of billing services	8%	6%	9%	**2%** ↓	**33%** ↑	**90%** ↑
Quality or accuracy of meter reading / enhanced metering services	4%	2%	8%	<0.5%	4%	**86%** ↑

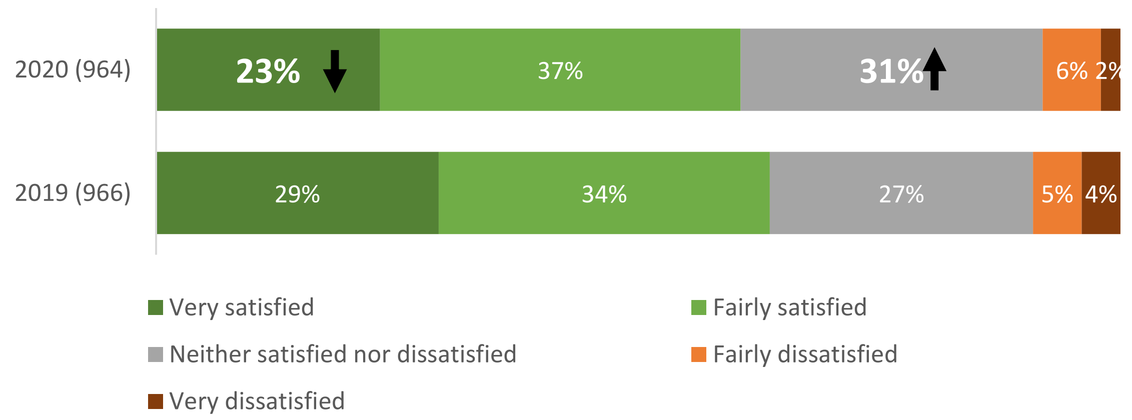
J1 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant difference from the average at the 95% level of confidence

There were also differences between those who were satisfied and those who were dissatisfied with their current retailer, with the former significantly more likely to mention a reliable water supply (61% cf. 28%) as an important issue, and the latter significantly more likely to mention quality of customer service (57% cf. 19%), quality of billing services (29% cf. 7%), and quality or accuracy of meter readings or an enhanced metering service (17% cf. 3%).

3.8.2 Overall satisfaction with the water market

Overall satisfaction with the water market as a whole has declined significantly since 2019, from 64% to 60%, driven by a significant decline in the proportion who were very satisfied (23% cf. 29%), and an increase in neutral responses (31% neither/nor cf. 27%) rather than an increase in dissatisfaction (9% in both instances).

Figure 20: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?



J2 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

As shown in the figure overleaf, customers in the Severn Trent (71%), Wessex (77%) and Dŵr Cymru (92%)[8] water regions were more satisfied than average with the water market as a whole, while those in the Yorkshire Water region were less satisfied than average (50%).

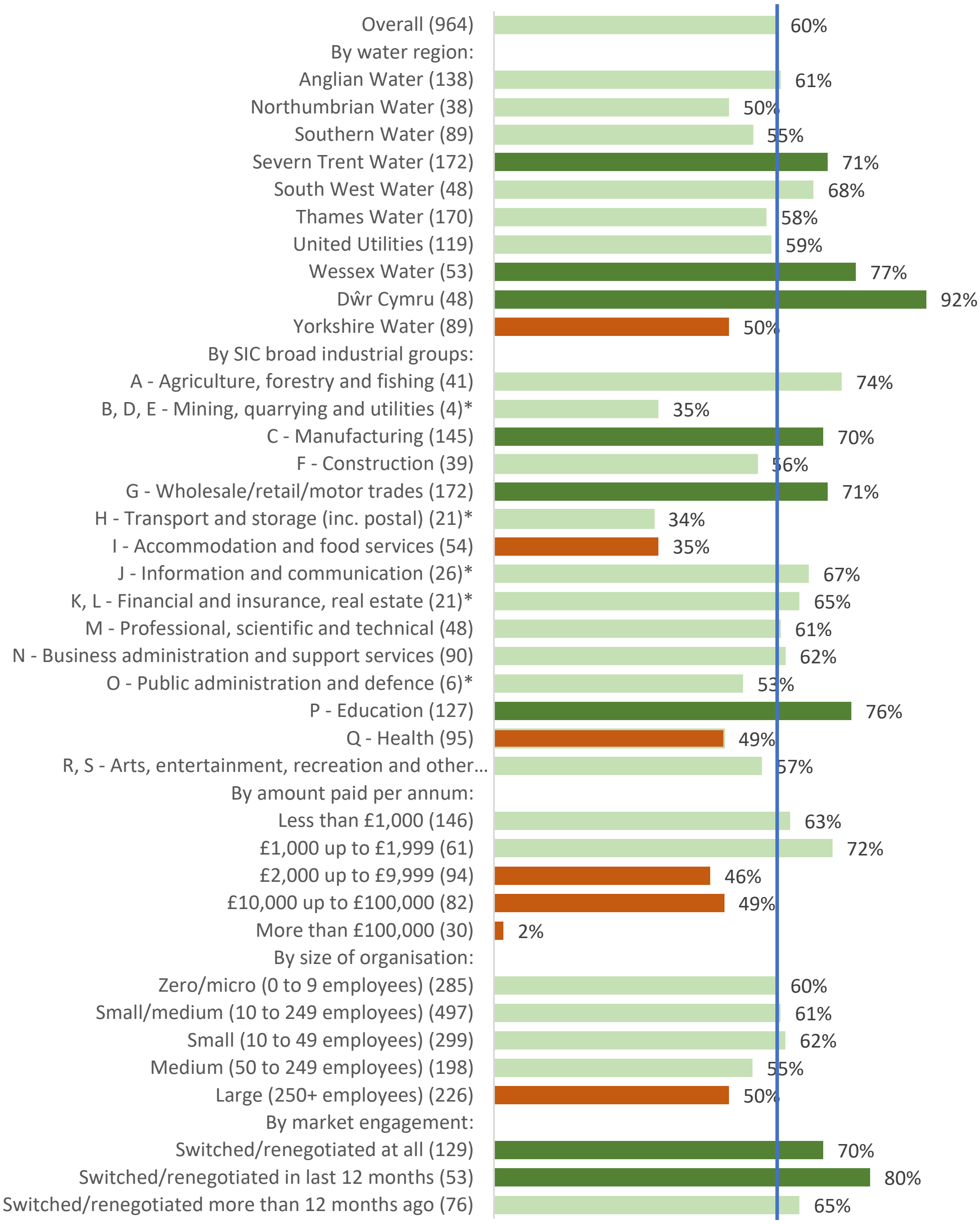
By industry, those in manufacturing (70%), wholesale/retail/motor trades (71%) and education (76%) were more satisfied than average, while those in accommodation and food services (35%) and health (49%) were less satisfied than average.

Those paying £2,000 or more per annum were significantly less satisfied than average, and only 2% whose annual bill is greater than £100,000 were satisfied, as compared to 28% in 2019, and 90% were dissatisfied.

Those with a more recent switching experience were also more satisfied than average (80%).

[8] Again, please note the different market conditions in Wales.

Figure 21: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole? (% satisfied)



J2 Base: All representative customers (excluding don't know/refused – unweighted base sizes in parentheses)
Green shading indicates result is significantly higher than the average at the 95% level of confidence
Orange shading indicates result is significantly lower than the average at the 95% level of confidence
*indicates caution: low base (<30)

4. Survey of switchers and re-negotiators

4.1 Introduction

The representative survey found that 1.4% of customers switched in the last 12 months, and 2.4% renegotiated a new deal with their existing retailer in the last 12 months. Overall 3.8% of customers switched or renegotiated in the last 12 months.

To explore the experiences of switchers and re-negotiators in more depth, a separate survey of switchers and re-negotiators was undertaken, drawing on both the sample of switchers and re-negotiators found through the representative survey (134), plus a separate sample of (707) switchers drawn from data on customers who switched held by the market operator MOSL.[9]

The survey of switchers and re-negotiators survey began by confirming that a customer had switched retailers or negotiated a new deal. The survey went on to ask customers who had switched or renegotiated about:

- Overall Satisfaction;
- Searching for information and comparing retailers;
- Motivations for switching/renegotiating;
- The process of switching/renegotiating;
- Outcomes of switching/renegotiating;
- Overall views of the water market.

The results presented in the following sections primarily focus on customers who have switched or renegotiated in the last 12 months, who represent two thirds of all switchers/re-negotiators across both samples (65% of all switchers/re-negotiators did so in the last 12 months, equating to 549 respondents). Where possible comparisons are made with results from the 2019 survey, but it should be noted that the 2019 survey in the main refers to the time period since market opening rather than the last 12 months.

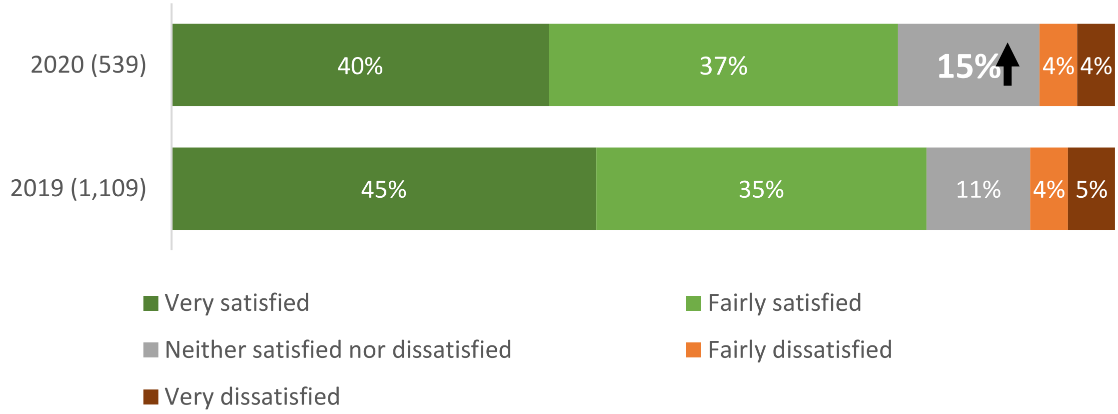
Where differences are evident between those who have switched or renegotiated in the last 12 months and those who have done so longer ago these are noted in the commentary. However, when considering these differences, it should be noted that many of them are likely to be accounted for by the fact that those who switched more than 12 months ago were significantly more likely to be large organisations (250+employees) (14% compared to 8% of those who switched in the last 12 months), and those who switched in the last 12 months were significantly more likely to be micro organisations (2 to 9 employees) (44% cf. 35% of those who switched more than 12 months ago).

[9] See section 1 for further details of the sample methodology.

4.2 Overall satisfaction – switchers and re-negotiators

The proportion of switchers and re-negotiators in the last 12 months who were satisfied with their current clean water and waste water retailer has remained stable (78% cf. 80% in 2019, and 82% in 2017/18). Levels of dissatisfaction were also similar (8% cf. 9%).

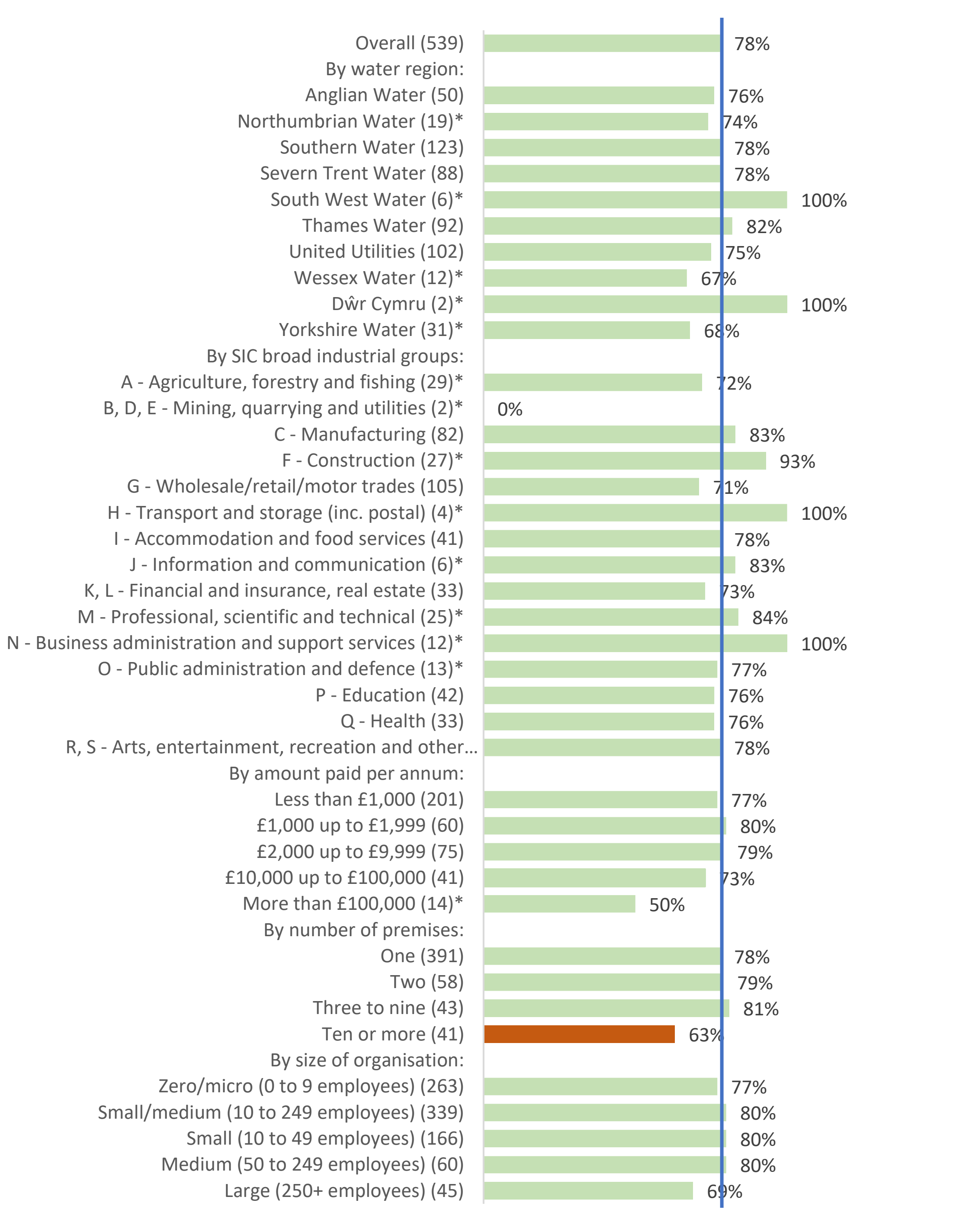
Figure 22: Overall, how satisfied or dissatisfied are you with your current water and waste water retailer(s)?



C1 Base: All switchers and re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

There were few significant differences by sub-groups of switchers/re-negotiators in the last 12 months, as was the case in 2019. The only exception was a lower than average level of satisfaction with the current water and waste water retailer among those with ten or more sites (63%).

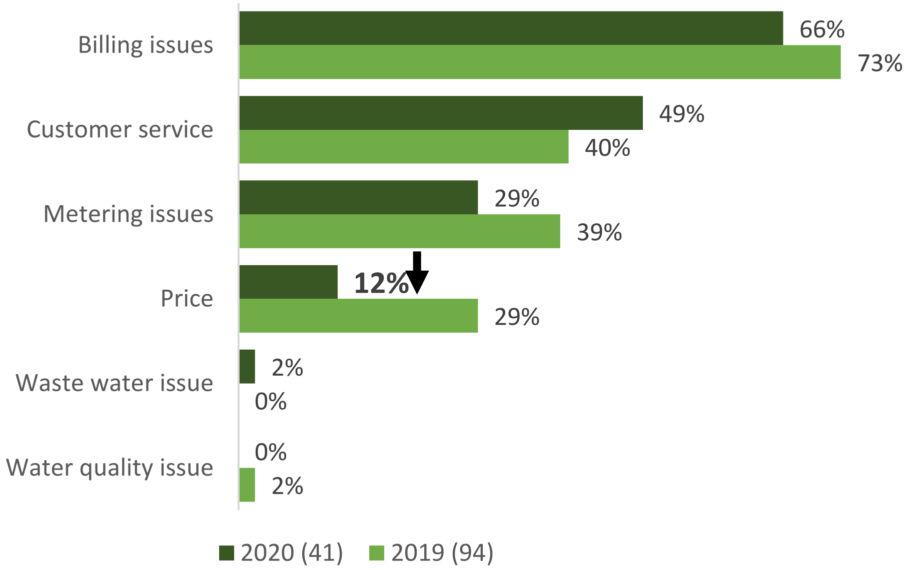
Figure 23: Overall, how satisfied or dissatisfied are you with your current water and waste water retailer(s)? (% satisfied)



C1 Base: All switchers and re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Orange shading indicates result is significantly lower than the average at the 95% level of confidence
*indicates caution: low base (<30)

Among those who had switched/renegotiated in the last 12 months who expressed dissatisfaction with current water and waste water retailers, the reasons provided remain largely consistent over time, with billing issues (66%), customer service (49%) and metering issues (29%) mentioned more often than price (12%), which is mentioned at significantly lower levels than was the case in 2019 (29%).

Figure 24: Why are you dissatisfied?



C2 Base: All dissatisfied switchers and re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

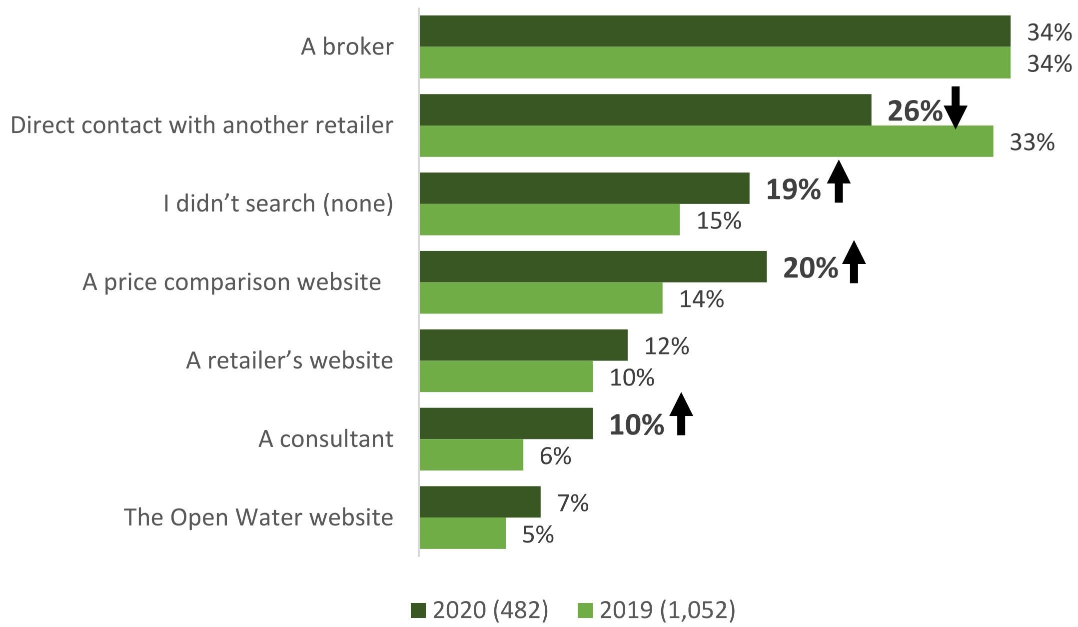
4.3 Searching and comparing

4.3.1 Searching for information

While brokers remain the most common source of information, mentioned by a third of switchers/re-negotiators in the last 12 months, as was the case in 2019 (34% in both instances), there has been a significant increase in the proportion of switchers/re-negotiators who report not searching for information about alternative retailers, from 15% in 2019, to 19% in the latest survey, and a decrease in the proportion making direct contact with another retailer (26% cf. 33%).

However, there have been increases in the proportions searching for information via price comparison websites (20% cf. 14%) and via consultants (10% cf. 6%).

Figure 25: Which of the following, if any, have you used to search for information about alternative retailers?



H1 Base: All switchers and re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Considering this by size shows that the likelihood of not searching for information decreases as size increases, from around a fifth of those with up to 49 employees, to one in twenty (5%) of large organisations.

Use of consultants was significantly higher than average among medium (21%) and large (26%) organisations, and use of the Open Water website was also higher than average among large organisations (18%).

Table 8: Which of the following, if any, have you used to search for information about alternative retailers? (by organisation size)

	Zero/ micro (0-9 employees) (242)	Small/ medium (10-249 employees) (198)	Small (10-49 employees) (146)	Medium (50-249 employees) (52)	Large (250+ employees) (38)
A broker	30%	38%	38%	38%	39%
Direct contact with another retailer	24%	28%	25%	37%	32%
A price comparison website	22%	17%	18%	12%	21%
I didn't search (none)	21%	20%	23%	13%	**5%** ↓
A retailer's website	10%	13%	13%	13%	21%
A consultant	8%	10%	**6%** ↓	**21%** ↑	**26%** ↑
The Open Water website	5%	7%	5%	12%	**18%** ↑
Other	5%	4%	5%	0%	8%

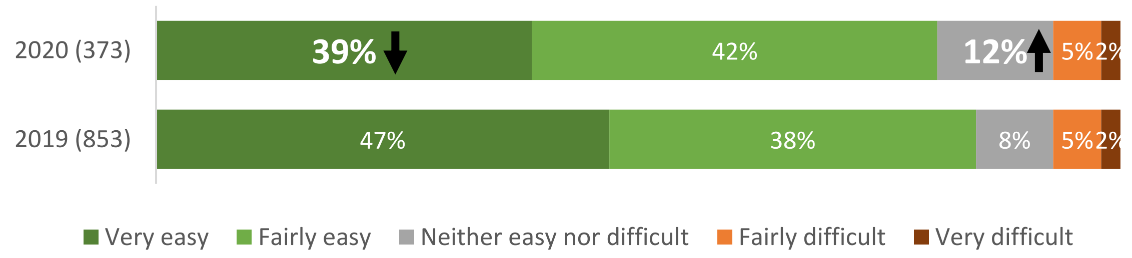
H1 Base: All switchers and re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

Among those who had switched/renegotiated in the last 12 months who used a price comparison website seven in ten (70%) said they used one which listed quotes from different retailers, and a similar proportion (66%) said they used one where they put in details for a tailored quote.

The overall proportion of those who had switched/renegotiated in the last 12 months who found it easy to find the information they needed to make an informed choice is in line with that seen in 2019 (81% cf. 85%). However, of these, significantly fewer customers found it 'very easy' than was the case in 2019 (39% cf. 47%), such that more customers in the latest survey found it 'fairly' rather than 'very easy', unlike the 2019 survey.

The proportion who found it difficult is in line with 2019 (8% cf. 7%).

Figure 26: How easy or difficult was it for you to find the information you felt like you needed to make an informed choice?



H3 Base: Switchers and re-negotiators in the last 12 months (2020)/since market opening (2019) who searched for information on different retailers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

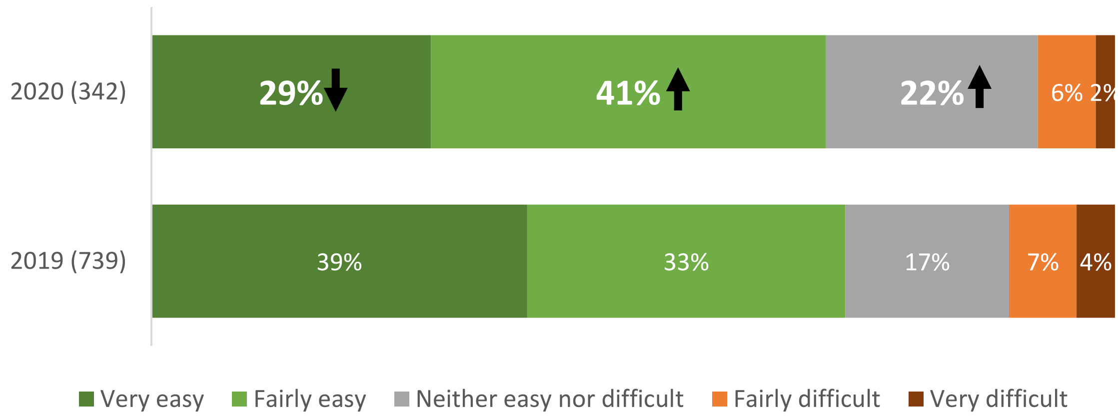
Of the 27 who found it difficult, 14 said it was because they didn't understand the information, 10 that they didn't know where to go for information, 4 that they didn't know enough about the market, 4 that the information was not relevant, and 2 that the information was unavailable via their preferred method.

4.3.2 Comparing retailers

As with the ease of finding information, while the overall proportion of those who had switched/renegotiated in the last 12 months who found it easy to compare different retailers was in line with that seen in 2019 (70% cf. 72%), within this significantly more customers found it 'fairly' (41% cf. 33%) rather than 'very easy' (29% cf. 39%). Consequently a greater proportion in 2020 found it 'fairly' rather than 'very easy', in contrast to the 2019 survey.

The proportion who found it difficult was in line with 2019 (8% cf. 11%).

Figure 27: How easy or difficult was it to compare different retailers?



H5 Base: Switchers and re-negotiators in the last 12 months (2020)/since market opening (2019) who searched for information on different retailers (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Of the 27 who found it difficult to compare different retailers, 11 said it was because prices weren't clear, 6 that the information was not consistent, 5 that they could not get enough quotes or the quotes were of insufficient quality, 5 that the information was not available via their preferred communication channel, 3 that they did not know what to compare, and 2 that they did not have time.

4.4 Motivations for switching or renegotiating

In the 2019 survey switchers and re-negotiators were asked to provide their motivations for switching or renegotiating on a spontaneous basis, i.e. to provide answers without any prompting from the interviewer.

For the 2020 survey, the same approach was adopted to allow for comparisons with the 2019 results. However switchers and re-negotiators were also prompted with a list of possible reasons why they might have started looking into switching or renegotiating, to ensure that each respondent had the opportunity to consider the full breadth of possible motivations, rather than simply the most top of mind.

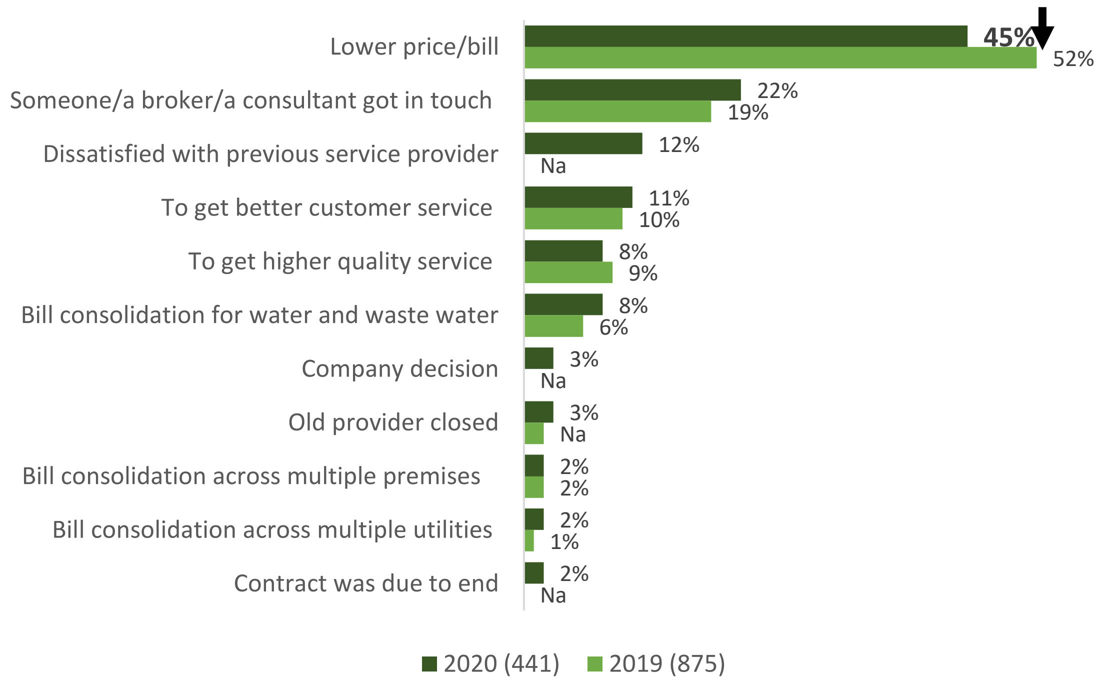
The following sections compare the spontaneous responses from the 2020 and 2019 surveys, and report the results of the additional prompted questions.

4.4.1 Motivations for switching

The motivations provided by those who had switched in the last 12 months are largely price-related (45%), while one in five (22%) looked into switching because someone got in touch with them, and one in ten because they were dissatisfied with their previous service provider (12%), to get better customer service (11%), to get a higher quality of service (8%), and to consolidate bills for water and waste water (8%).

Significantly fewer mentioned price than was the case in 2019 (45% cf. 52%), but, other than this, motivations remain largely unchanged.

Figure 28: Why did you start looking into switching?



E12 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

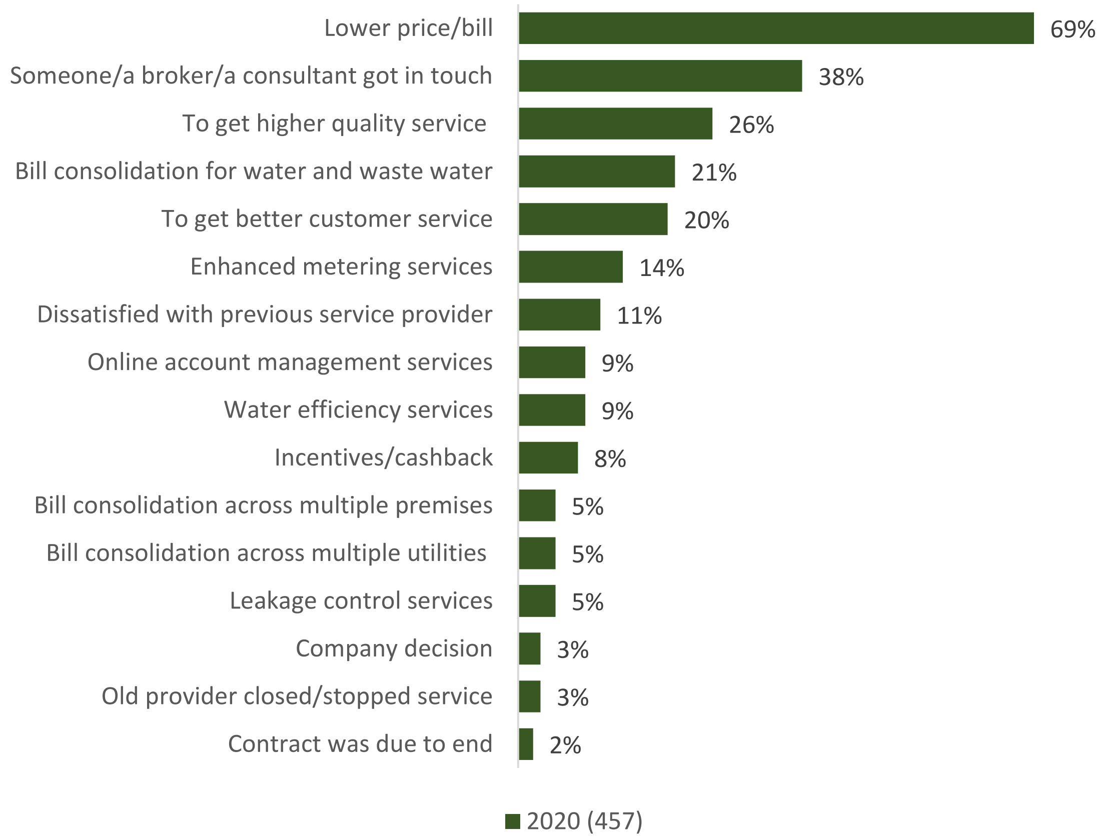
There were few differences by organisation size, with the exception that large organisations were significantly more likely than average to mention higher quality service (22% cf. 8%), better customer service (25% cf. 11%), bill consolidation across multiple premises (9% cf. 2%) and that it was a wider company decision (16% cf. 3%) and less likely to mention that they had been contacted by a broker/consultant (3% cf. 22%).

On a prompted basis, seven in ten (69%) of those who had switched in the last 12 months started looking into switching in order to reduce bills. While this was by far the most common motivation, it was significantly less so for those who had switched in the last 12 months as compared to those who switched longer ago (69% cf. 77%).

Two in five (38%) were contacted by a broker or consultant, a quarter (26%) wanted a higher quality service, and one in five (20%) better customer service. Around one in seven wanted enhanced metering services (14%), and this was significantly higher than was the case among those who switched over 12 months ago (7%). One in ten were dissatisfied with their previous provider (11%).

In terms of bill consolidation, a fifth (21%) wanted to consolidate bills for water and waste water, and one in twenty across multiple premises (5%) and multiple utilities (5%). Overall, 28% wanted to consolidate for some reason.

Figure 29: Why did you start looking into switching? Were any of the following reasons for looking into switching? In what way did you want to consolidate your bills? (Prompted)



E12/E13/E15 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base size in parentheses)

As shown in the figure below, while interestingly there were no significant differences between sub-groups of those who had switched in the last 12 months with different annual bill sizes in terms of the proportions who mentioned price as a motivation for switching, there were other issues mentioned at different levels:

- Switchers with an annual bill of less than £1,000 were more likely to mention the fact that someone got in touch with them (44%) and less likely to mention higher quality service (18%);
- Switchers with an annual bill of between £10,000 and £100,000 were more likely to mention higher quality service (49%), better customer service (39%), dissatisfaction with a previous provider (22%), enhanced metering services (34%) and bill consolidation across multiple premises (20%);
- While the base size for switchers with an annual bill of over £100,000 is too low to support robust statistical analysis, they were, in percentage terms, the most likely to mention higher quality service and better customer service.

Table 9: Why did you start looking into switching? Were any of the following reasons for looking into switching? (by amount paid per annum)

	Less than £1,000 (196)	£1,000 up to £1,999 (59)	£2,000 up to £9,999 (75)	£10,000 up to £100,000 (41)	More than £100,000 (12)*
Lower price/bill	69%	71%	68%	73%	75%
Someone/a broker/a consultant got in touch	**44%** ↑	39%	36%	39%	17%
To get higher quality service	**18%** ↓	22%	31%	**49%** ↑	67%
To get better customer service	18%	14%	23%	**39%** ↑	67%
Dissatisfied with previous service provider	10%	12%	15%	**22%** ↑	8%
Enhanced metering services	11%	8%	16%	**34%** ↑	33%
Bill consolidation across multiple premises	**2%** ↓	3%	8%	**20%** ↑	17%

E12/E13/E15 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence
* indicates caution: low base (<30)

Similarly, while there were no significant differences between different sizes of organisation who had switched in the last 12 months in terms of the proportions who mentioned price as a motivation for switching, larger organisations were more likely than average to mention higher quality service (58%), better customer service (42%), bill consolidation across multiple premises (24%), and leakage control services (12%) as motivations.

Table 10: Why did you start looking into switching? Were any of the following reasons for looking into switching? (by organisation size) (Prompted)

	Zero/ micro (0-9 employees) (232)	Small/ medium (10-249 employees) (188)	Small (10-49 employees) (138)	Medium (50-249 employees) (50)	Large (250+ employees) (33)
Lower price/bill	67%	70%	69%	74%	82%
To get higher quality service (e.g. more detailed billing)	22%	26%	27%	22%	**58%**↑
To get better customer service (e.g. when I contact them)	17%	20%	20%	20%	**42%**↑
Bill consolidation across multiple premises	**2%**↓	5%	4%	8%	**24%**↑
Company decision (Inc. general review of bills)	**1%**↓	4%	4%	4%	**15%**↑
Leakage control services	3%	4%	4%	6%	**12%**↑
Someone/a broker/a consultant got in touch	40%	40%	39%	44%	**12%**↓

E12/E13/E15 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

This pattern of results is similar in terms of number of premises.

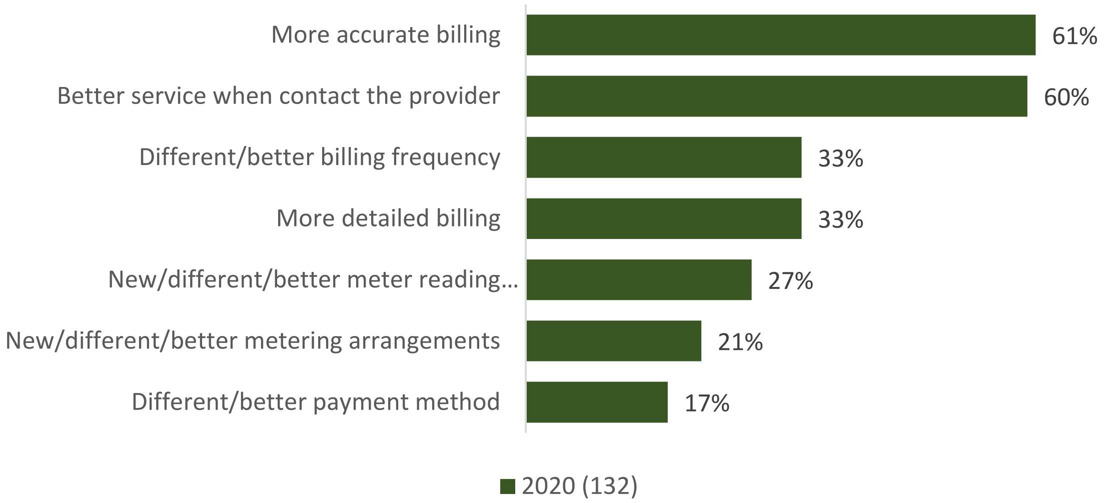
Table 11: Why did you start looking into switching? Were any of the following reasons for looking into switching? (by amount paid per annum)

	Single site (339)	2 sites (50)	3-9 sites (31)	10+ sites (32)
Lower price/bill	69%	74%	61%	72%
Someone/a broker/a consultant got in touch	40%	42%	29%	**19%**↓
To get higher quality service	**22%**↓	22%	42%	**53%**↑
To get better customer service	**17%**↓	20%	32%	**41%**↑
Bill consolidation across multiple premises	**1%**↓	10%	10%	**25%**↑

E12/E13/E15 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

Among the quarter (26%) of those who had switched in the last 12 months who wanted a higher quality service, the key aspects of the service they wanted to improve were accuracy of billing (61%) and better service when they make contact (60%). Better billing frequency and more detailed billing were mentioned by a third (33% in both cases).

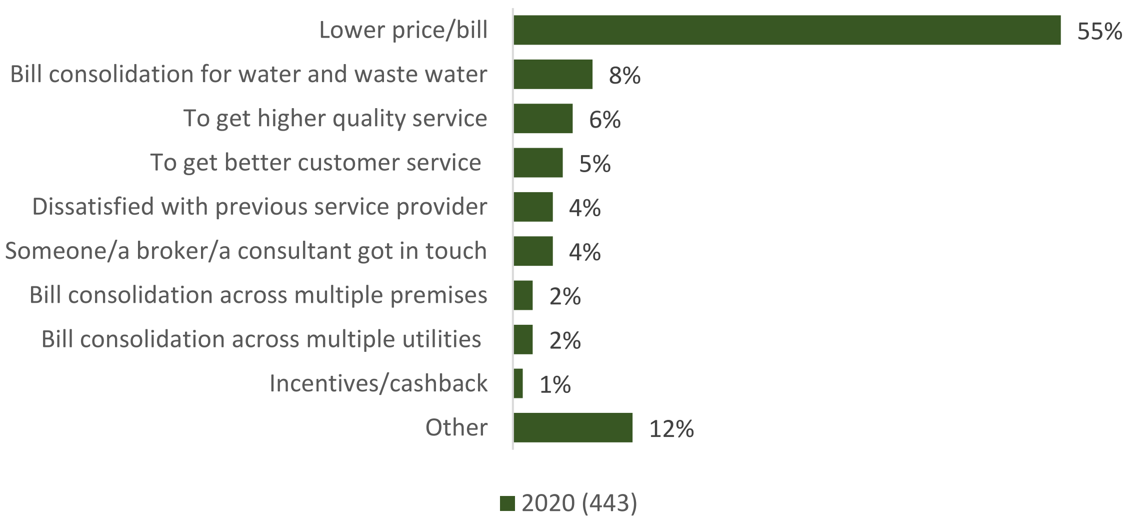
Figure 30: What was it specifically about the service that you wanted to improve?



E14 Base: Switchers in the last 12 months who looked into switching because they wanted a higher quality service (excluding don't know/refused – unweighted base size in parentheses)

When asked to take into account all the reasons for switching that they had mentioned, and to say which was the most significant in their decision to switch, over half (55%) mentioned price, and close to one in ten (8%) mentioned bill consolidation for water and waste water services. Other specific issues were mentioned by around one in twenty switchers or fewer.

Figure 31: Taking into account all the reasons for switching that you've mentioned, which was the most significant in your decision to switch?



E22 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base size in parentheses)

Considering this by organisation size, large organisations were significantly less likely than average to say that price was the most significant reason for switching (31%), although price was still the most commonly mentioned reason among this group.

By contrast, large organisations were significantly more likely than average to say the main reason for their decision to switch was that they wanted a higher quality service (22%) and that they wanted to consolidate bills across multiple premises (16%).

Table 12: Taking into account all the reasons for switching that you've mentioned, which was the most significant in your decision to switch? (by organisation size)

	Zero/ micro (0-9 employees) (226)	Small/ medium (10-249 employees) (181)	Small (10-49 employees) (133)	Medium (50-249 employees) (48)	Large (250+ employees) (32)
Lower price/bill	57%	58%	56%	63%	**31%**↓
Dissatisfied with previous service provider	**6%**↑	2%	2%	2%	3%
To get higher quality service	5%	3%	4%	2%	**22%**↑
To get better customer service (e.g. when I contact them)	**2%**↓	**7%**↑	8%	6%	6%
Bill consolidation across multiple premises	0%	3%	3%	2%	**16%**↑

E22 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

Arrows indicate statistically significant differences from the average at the 95% level of confidence

Where switchers were prompted by a broker to look into switching, in most instances the broker offered them a lower price (92%), and in around a quarter of instances offered the following:

- Deals on other utilities (26%);
- Higher quality service (23%);
- Consolidation of bills (22%).

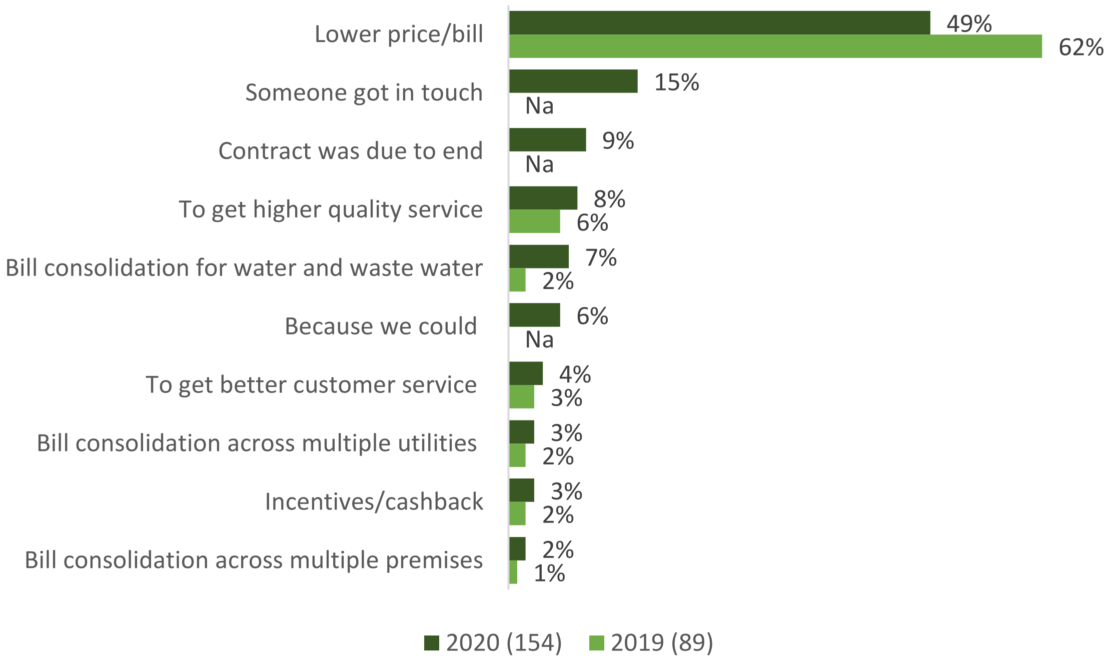
One in seven offered online account management services (14%), one in ten offered incentives/cashback (11%), water efficiency services and enhanced metering services (both 7%) and 3% offered leakage control services.

4.4.2 Motivations for renegotiating

As with switching, on a spontaneous basis, the motivations for renegotiating remain largely unchanged since 2019, and continue to be largely price-related (49% cf. 62% in 2019).

One in six (15%) of those who had renegotiated in the last 12 months started looking into it because someone contacted them, and around one in ten because their contract was due to end (9%), to get a higher quality of service (8%) or to consolidate bills for water and waste water (7%).

Figure 32: Why did you start looking into renegotiating?

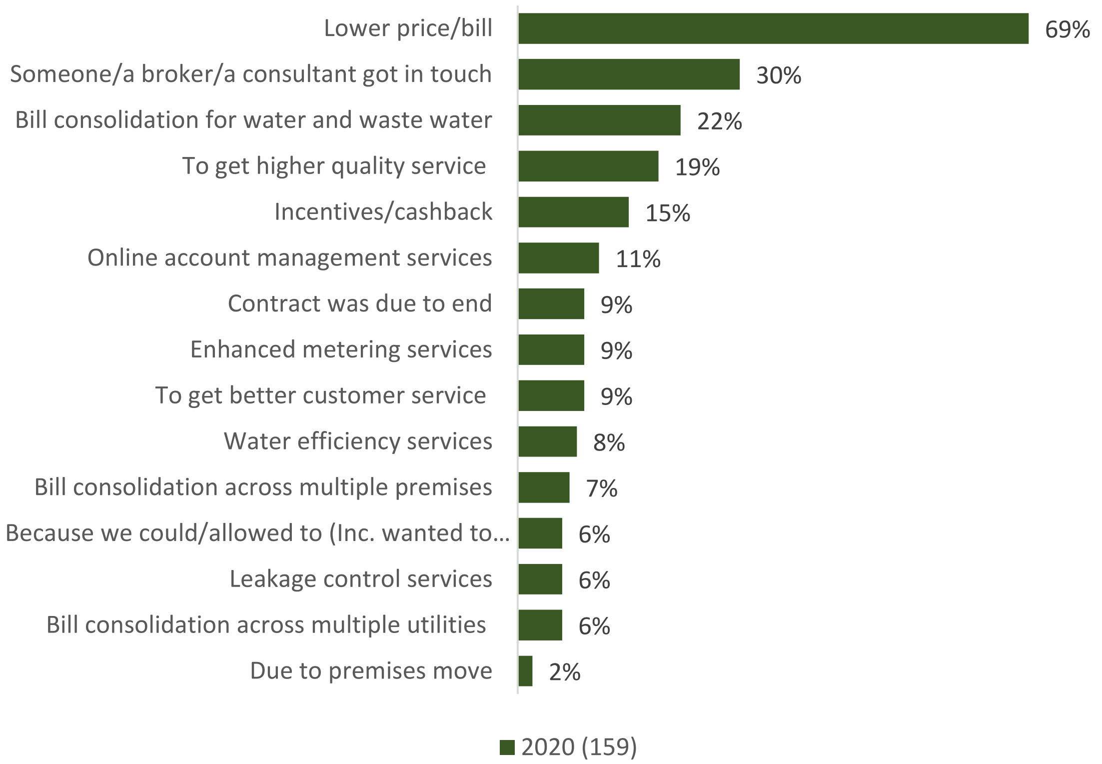


FE12 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

On a prompted basis, overall, seven in ten (69%) of those who had renegotiated in the last 12 months looked into it on the basis of price, while three in ten (30%) were contacted by a broker or consultant, and one in five (19%) looked into it to get a higher quality service. Around one in six (15%) considered incentives/cashback.

In terms of bill consolidation, one in five (22%) wanted to consolidate bills for water and waste water, and one in twenty across multiple premises (7%) and multiple utilities (6%). Overall, 26% wanted to consolidate for some reason.

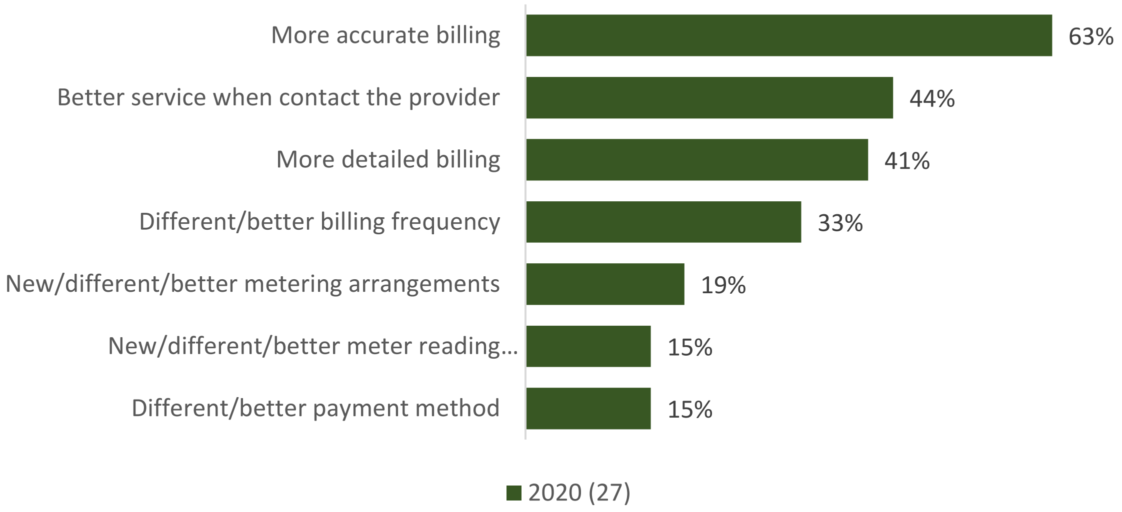
Figure 33: Why did you start looking into renegotiating? Were any of the following reasons for looking into renegotiating? In what way did you want to consolidate your bills?



FE12/FE13/FE15 Base: All re-negotiators in the last 12 months (excluding don't know/refused – unweighted base size in parentheses)

Among the one in five (19%) of re-negotiators who wanted a higher quality service, the key aspects of the service they wanted to improve were accuracy of billing (63%), better service when they make contact (44%), more detailed billing (41%) and different billing frequency (33%).

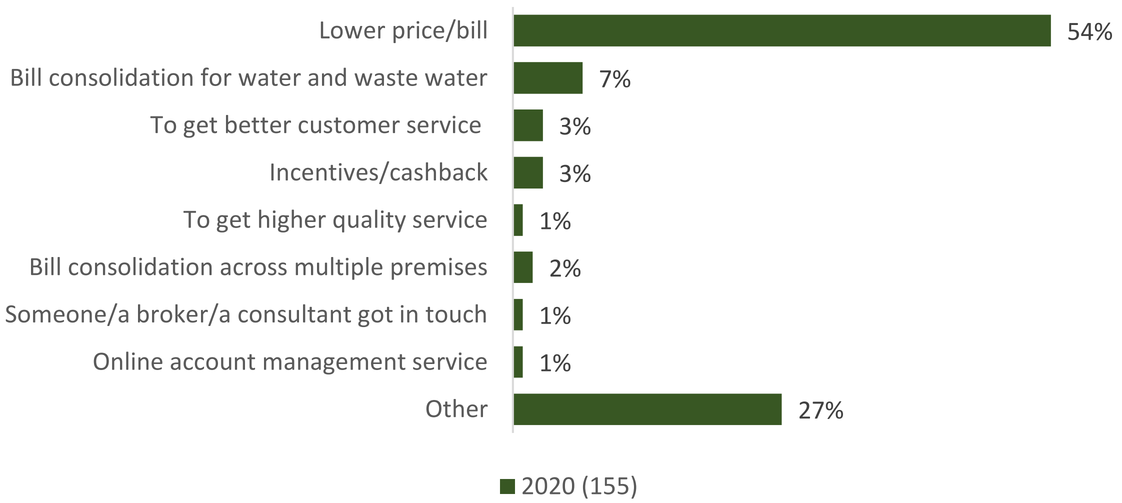
Figure 34: What was it specifically about the service that you wanted to improve?



FE14 Base: Re-negotiators in the last 12 months who looked into renegotiation because they wanted a higher quality service (excluding don't know/refused – unweighted base size in parentheses)

When asked to take into account all the reasons for renegotiating that they had mentioned, and to say which was the most significant in their decision to renegotiate, over half (54%) mentioned price, and one in twenty (7%) mentioned bill consolidation for water and waste water services. Other specific issues were mentioned by less than one in twenty re-negotiators.

Figure 35: Taking into account all the reasons for renegotiating that you've mentioned, which was the most significant in your decision to renegotiate?



FE22 Base: Re-negotiators in the last 12 months (excluding don't know/refused – unweighted base size in parentheses)

Where re-negotiators were prompted by a broker to look into renegotiating (35 respondents), in most instances the broker offered them a lower price (83%). Other offers included:

- Consolidation of bills (29%);
- Higher quality service (20%);
- Incentives/cashback (17%);
- Deals on other utilities (14%);
- Online account management service (14%);
- Water efficiency services (11%);
- Leakage control services (9%);
- Enhanced metering services (6%).

4.5 The process of switching or renegotiating

4.5.1 Introduction

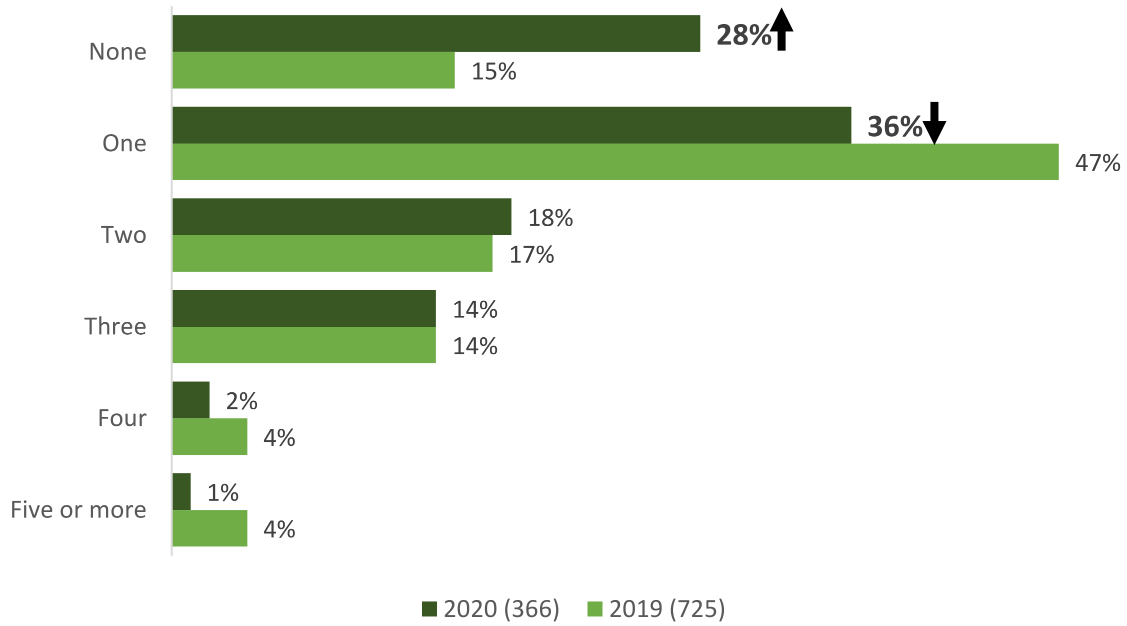
Customers who switched their clean and/or waste water retailer, or renegotiated with their current retailer, in the last 12 months were asked about their experience of the process. In the case of those who had switched and/or renegotiated on more than one occasion, customers were asked to reflect on their most recent experience only.

4.5.2 Receiving quotes

The significant increase in the proportion of those who had switched in the last 12 months who report not searching for information about alternative retailers, from 15% in 2019, to 21% in the latest survey, means there has been a significant increase in the proportion of those who switched in the last 12 months who reported receiving no quotations (28% cf. 15%), and a corresponding fall in the proportion getting one quotation (36% cf. 47%).

The proportion who received two or more quotations has remained relatively consistent (35% cf. 39%).

Figure 36: How many, if any, different retailers did you receive price quotations from prior to switching?



E4 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

While the base size for large organisations is insufficient to support robust statistical analysis, the table below clearly indicates that the likelihood of getting price quotations from a number of retailers increases with organisation size, such that nine in ten (87%) large organisations received at least one quotation, and two thirds (67%) received two or more.

Table 13: How many, if any, different retailers did you receive price quotations from prior to switching? (by organisation size)

	Zero/ micro (0-9 employees) (185)	Small/ medium (10-249 employees) (153)	Small (10-49 employees) (115)	Medium (50-249 employees) (38)	Large (250+ employees) (24)*
0	**34%**↑	22%	24%	16%	13%
1	39%	34%	34%	34%	21%
2	16%	22%	23%	18%	13%
3	**9%** ↓	19%	16%	**29%**↑	33%
4	1%	2%	2%	3%	13%
5 or more	1%	1%	1%	0%	8%

E4 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence
* indicates caution: low base (<30)

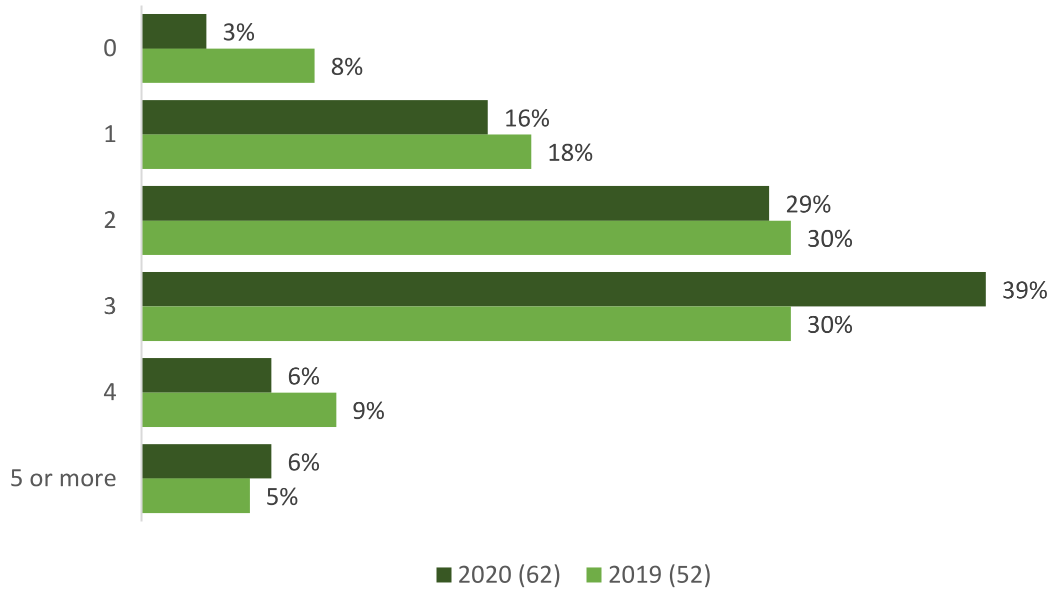
Those who switched more than 12 months ago were significantly more likely than those who switched more recently to have received five or more quotations (8% cf. 1%), but it must be noted that this is likely to be accounted for by the fact that those who switched more than 12 months ago were significantly more likely to be large organisations who, as noted above, tend to receive more quotations.

Close to half (47%) of those who had re-negotiated in the last 12 months had explored what else was on offer with other retailers before they renegotiated, a significant decline on the 63% who reported doing so in 2019.

While there were indications that re-negotiators are receiving more price quotations than was the case in 2019, with over half (52%) receiving three or more (cf. 44% in 2019), the differences are not statistically significant.

Nevertheless, it remains the case that re-negotiators were more likely than switchers to approach a number of retailers (80% of re-negotiators approached two or more, as compared to 35% of switchers).

Figure 37: How many, if any, different retailers did you receive price quotations from prior to renegotiating or getting a new deal?



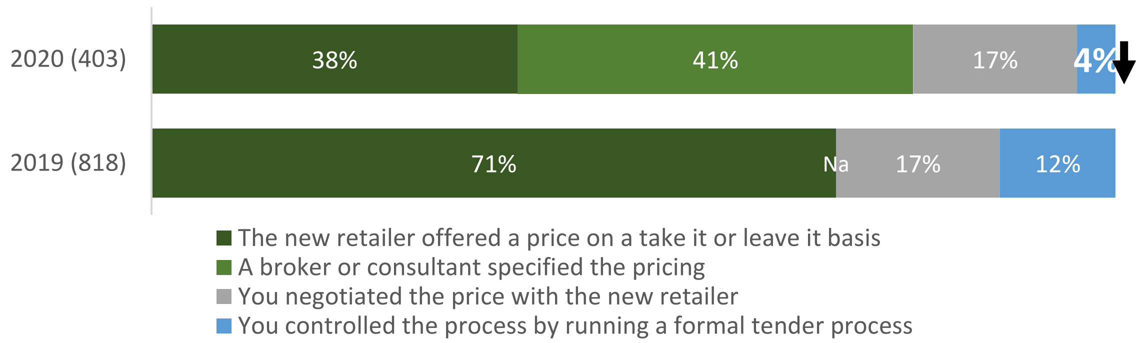
FE4 Base: Re-negotiators in the last 12 months (2020)/since market opening (2019) who explored what was on offer before renegotiating (excluding don't know/refused – unweighted base sizes in parentheses)

4.5.3 Approach to switching

Around two fifths of switchers in the last 12 months were offered a price by their retailer on a take it or leave it basis (38%) or had a price specified by a broker (41%), an option that was not included in 2019. Combining these two responses gives 79%, which is significantly higher than the 71% in 2019 who were offered a price on a take it or leave it basis by their retailer.

However, although not directly comparable, while the proportion who negotiated a price with the new retailer has remained stable at a fifth (17% in both instances), there has been a significant decline in the proportion who controlled the process by running a formal tender process (from 12% in 2019 to 4% in the latest survey).

Figure 38: Which of the following best describes your experience of agreeing a price with your new retailer?



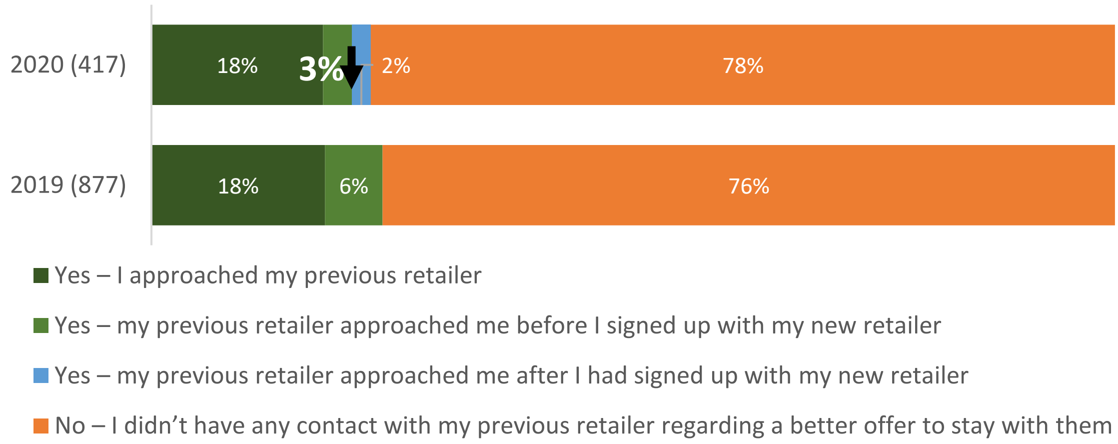
E5 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence
NB: In 2019, 'a broker or consultant specified the pricing' was not included

While overall only one in twenty (4%) controlled the process by running a formal tender, this rises to a fifth (19%) of large organisations (250+ employees), significantly higher than the average. However, this is significantly lower than the 53% of large organisations who reported doing so in the 2019 survey.

Where a broker or consultant specified the pricing, over half (53%) approached their customer with a deal in hand, a quarter (24%) worked with them to negotiate a price with the new retailer, and a similar proportion (23%) offered a price on a take it or leave it basis.

When those who had switched in the last 12 months were asked whether they had contact with their previous retailer regarding the possibility of a better deal, the pattern of response was very similar to that in 2019, with three quarters saying they had not (78% cf. 76%) and a sixth saying that they had approached their retailer (18% in both instances). However, the already small proportion who reported that their previous retailer approached them prior to switching (6%) has halved to 3%, a significant decline.

Figure 39: Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal?



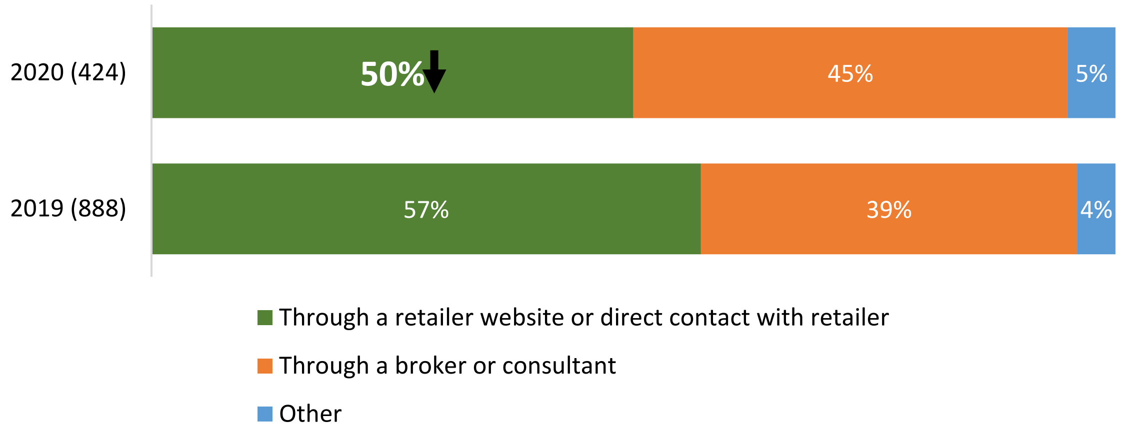
E7 Base: All switchers in last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

The base size for large organisations is insufficient to support robust statistical analysis (29 respondents), but the indications are that this group were more likely than average to have approached their previous retailer (38%).

Of the 22% of switchers who had had contact with their previous retailer, in three quarters of cases (75%) their retailer offered them nothing to encourage them to stay. One in five (20%) were offered a cheaper tariff, and one in fifty (2%) were offered additional services.

Significantly fewer of those who switched in the last 12 months arranged the switch through a retailer website or direct contact with a retailer than was the case in 2019 (50% cf. 57%), with 45% arranging it through a broker or consultant.

Figure 40: How did you arrange the switch?

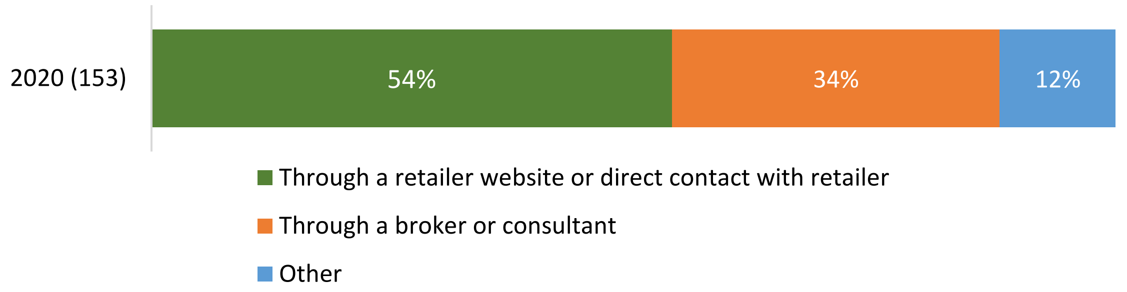


E2 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

4.5.4 Approach to renegotiating

Over half of those who had renegotiated in the last 12 months (54%) did so through a retailer website or direct contact with the retailer, and a third (34%) through a broker or consultant.

Figure 41: How did you renegotiate?



FE2 Base: All re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

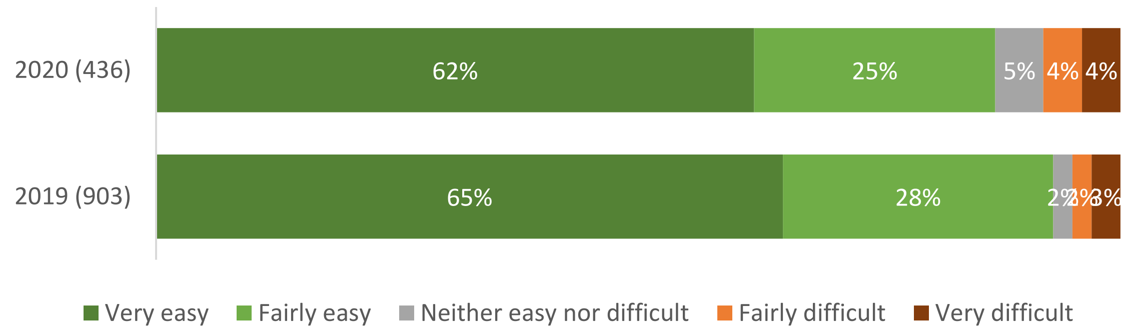
Where they renegotiated via their retailer, three quarters (77%) were happy to discuss a new price and/or services, two in ten (22%) offered a take it or leave it new deal, and 1% were reluctant to discuss a new price and/or services.

4.5.5 The process of switching

The survey asked those who had switched in the last 12 months how easy or difficult they had found the process of switching. The great majority of switchers (87%) reported that they found the process of switching retailer either 'very' or 'fairly' easy.

However, as shown in the figure below, the reported overall ease of switching retailer has declined significantly from 93% in 2019 to 87% in the latest survey, and around one in twelve found it difficult (8%), a significant increase on the 5% who did so in 2019.

Figure 42: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?



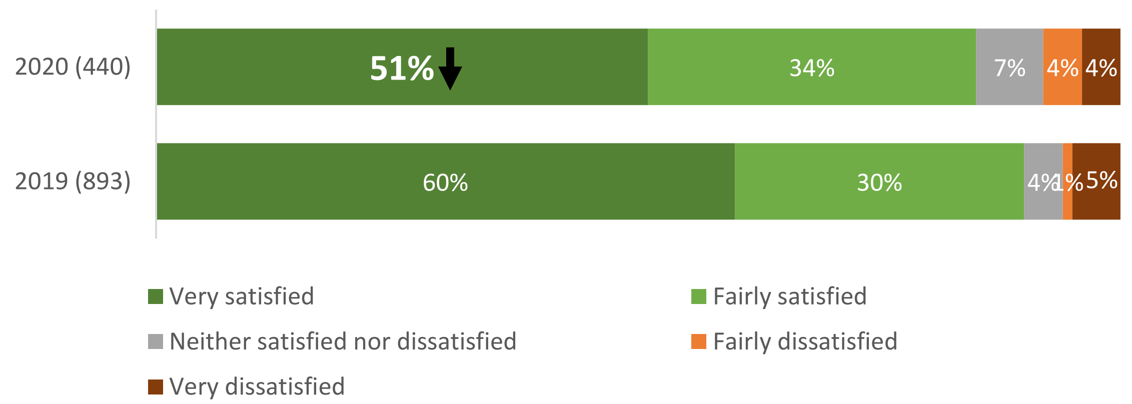
E9 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

Those paying between £10,000 and £100,000 per year were more likely than average to find the process of switching difficult (21%).

While remaining high, satisfaction with the time it took for the switch to take place has also fallen significantly from 90% in 2019 to 85% in the latest survey, driven by a significant decline in the proportion who were very satisfied (from 60% to 51%).

However there remains a small proportion who were dissatisfied with the time it took for the switch to take place (8% cf. 6%).

Figure 43: How satisfied or dissatisfied were you with the time it took for the switch to take place?



E11 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Those with 10 or more premises were significantly more likely than average to be dissatisfied with the time it took for the switch to take place (32%), as were large organisations (19%).

Dissatisfaction increased with the size of the bill from 5% of those with bills of less than £1,000, to 27% of those with bills of more than £100,000.

4.6 Outcomes of renegotiating or switching

4.6.1 Introduction

Customers who switched clean water and/or waste water retailers, or renegotiated a new deal with their existing supplier(s) were asked questions about the outcomes of the process. Customers who had switched or renegotiated more than once or who had switched and renegotiated previously were requested to reply regarding their most recent switch or renegotiation.

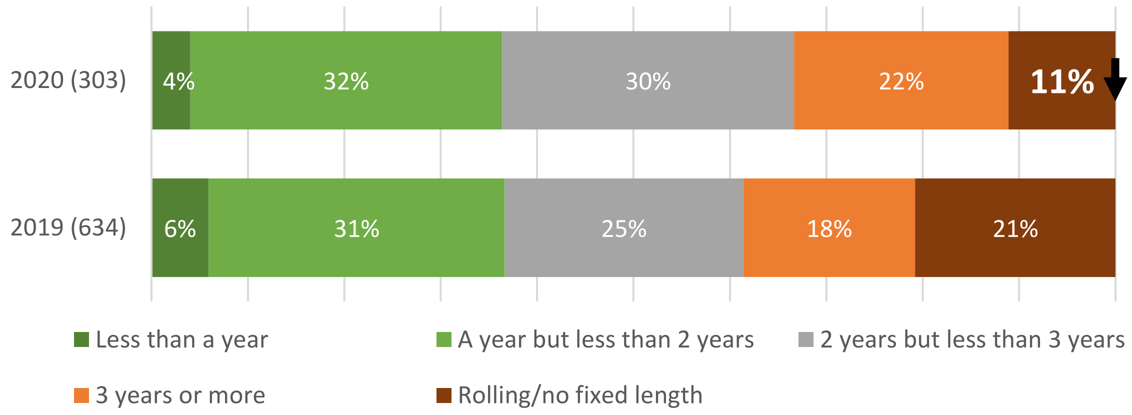
4.6.2 Outcomes for switchers

Duration of new contract

Around one in ten (11%) of those who had switched in the last 12 months reported that they entered into new contracts that were ‘rolling’ with no fixed length. The majority (66%) were less than 3 years in duration, while around a fifth (22%) exceeded three years. Compared to last year, fewer switchers elected to take rolling/no fixed length contracts (11% cf. 21%).

Those who had switched more than 12 months ago were more likely than those who had switched more recently to report having rolling contracts (22% cf. 11%) and less likely to report contracts of up to two years (21% cf. 36%). Given the fact that there were no significant differences in this respect by organisation size, this further confirms the trend away from rolling contracts identified above.

Figure 44: What is the total length of your new contract? This does not mean the time remaining on the contract but the length of the new contract from start to end.



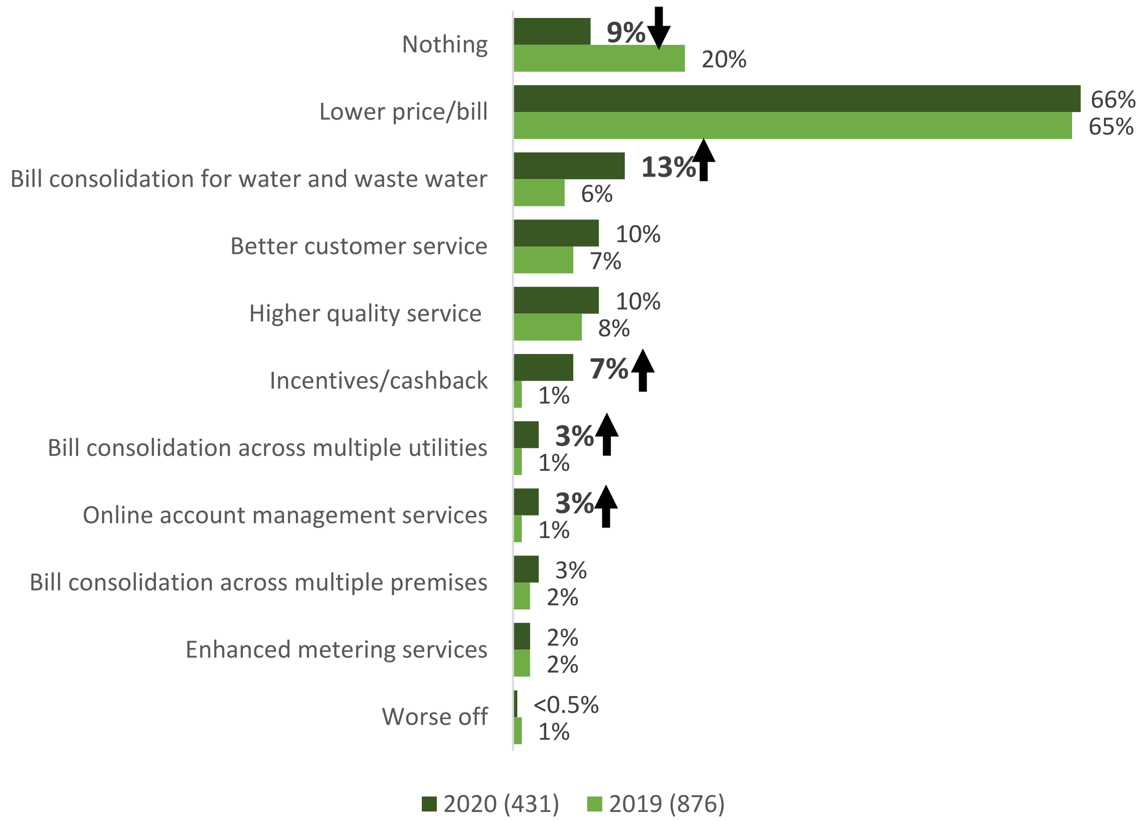
E1 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don’t know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Benefits of switching

The majority (91%) of those who had switched in the last 12 months reported that they had received some form of benefit as a result of switching, which is a significant increase from 2019 results, where 80% of switchers reported that switching had delivered some benefit.

Two thirds (66%) cited lower prices, in line with the 65% who did so in 2019, while there have been significant increases in the proportions mentioning bill consolidation for water and waste water (13% cf. 6%), incentives/cashback (7% cf. 1%), bill consolidation across multiple utilities and online account management services (both 3% cf. 1%).

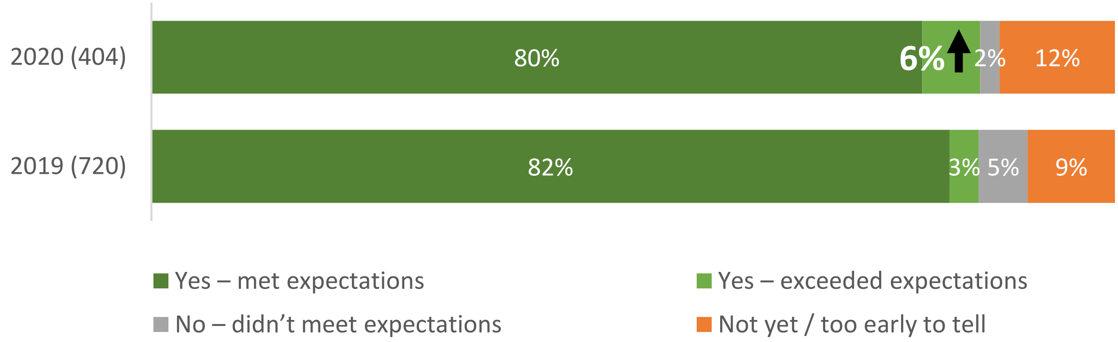
Figure 45: What benefits, if any, did you actually get from switching?



E23 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Eight in ten (80%) customers who did find benefits in switching felt that the benefits met their expectations, in line with 2019 (82%), and one in twenty (6%) felt that they exceeded their expectations, a significant increase on the 3% who did so in 2019.

Figure 46: Did the benefits meet your expectations?



E24 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

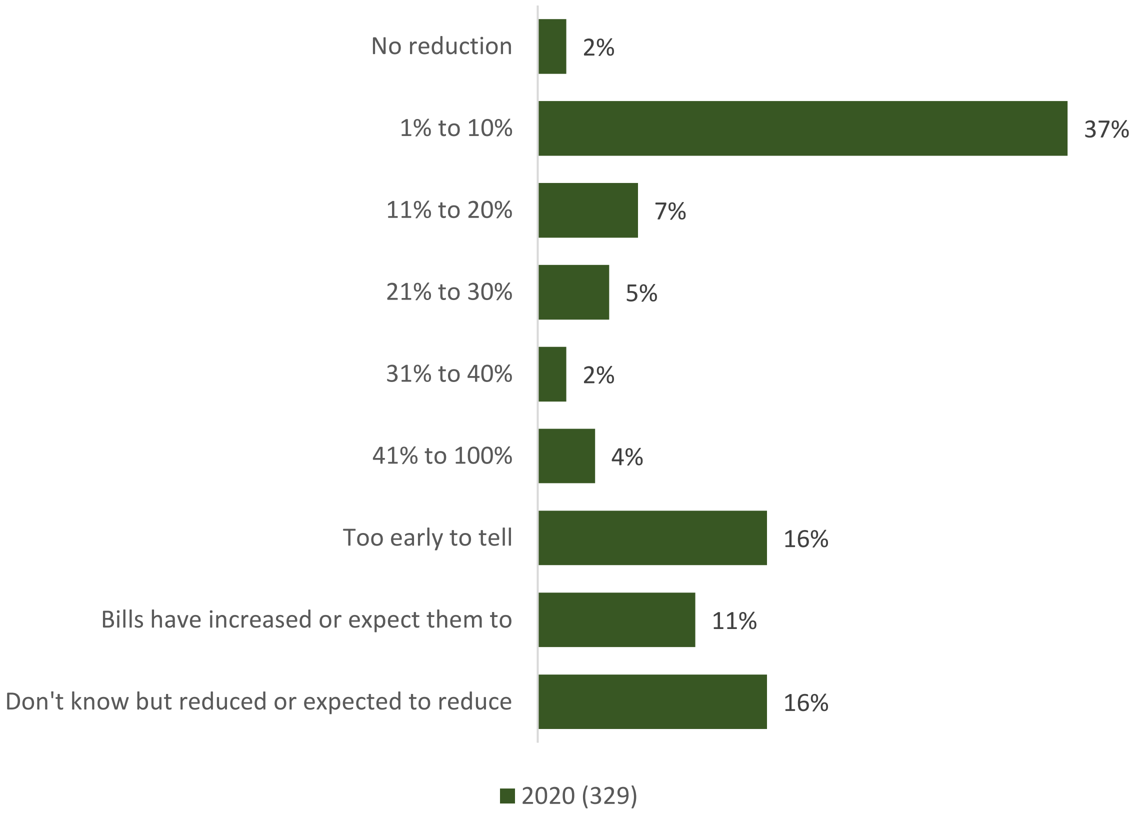
Three in five (60%) of those who had switched in the last 12 months said that they were better off after switching, a third (31%) were about the same, one in twenty (4%) were worse off, and a similar proportion (5%) said it was too early to tell.

The survey asked those who switched to estimate the extent to which they had seen bill reductions as a result of switching. Caution should be shown when considering the responses to this question, as the figures provided are purely estimates and cannot be taken to represent the actual savings realised.

Concerning the extent to which customers reported savings and bill reductions as a result of switching, seven in ten (71%) reported some form of reduction or expected reduction, while around one in ten (11%) said their bills had increased or they expected them to, and 2% reported no reduction. One in six (16%) felt that it was too early to tell.

The most commonly reported bill reduction among those who did report a reduction was 1% to 10%, mentioned by 37% of switchers (or about half of those reporting a reduction).

Figure 47: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer, if at all?



E29 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

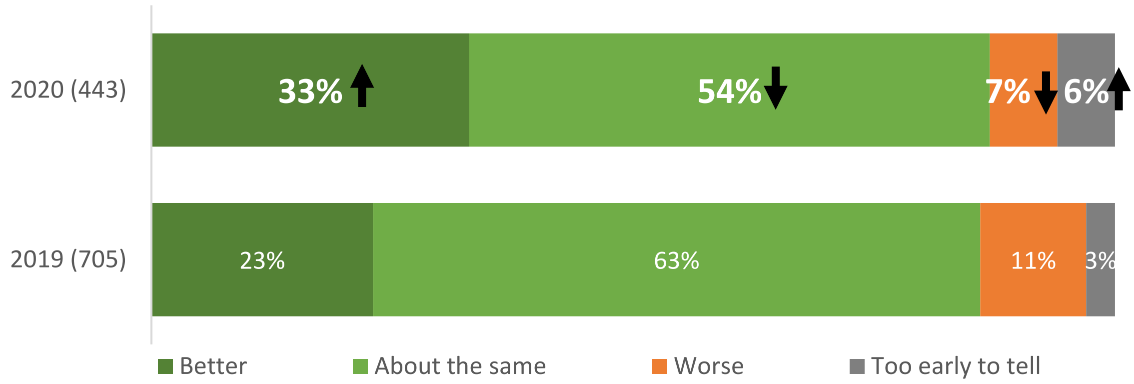
Around one in twenty (6%) of those who had switched in the last 12 months reported receiving new water efficiency or leak detection devices as a result of switching, in line with the 4% who did so in 2019. This rose to one in six (15%) of medium organisations and a quarter (23%) of large organisations and one in five of those with 10 or more premises (21%), all significantly higher than the average, with smaller organisations and those with fewer premises much in line with the average.

The majority (73%) of those who had switched in the last 12 months who had seen or expected reductions in their water bills, and also received water efficiency or leak detection services as a result of switching (11 out of 15 respondents), said that they believed this reduced bill was purely or mostly as a result of a lower tariff, rather than as a result of the water efficiency or leak detection services.

The proportion of customers who felt that the quality of retail services from their new retailer was better than their previous retailer has increased significantly from 23% in 2019 to 33% in the latest survey, and the proportion who felt it was worse has fallen significantly from 11% to 7%. One in five switchers (6%) felt it was too early to tell (higher than the 3% in 2019), while the majority felt it was about the same (54%, a significant decrease on the 63% in 2019).

Results were largely consistent by organisation size.

Figure 48: Is the quality of retail services like billing and meter-reading from your new retailer better, worse, or about the same as your previous retailer?



E32 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Over a third (36%) of those who had switched in the last 12 months with multiple premises have consolidated their water bill across multiple premises in a single bill as a result of switching, in line with the 27% who did so in 2019.

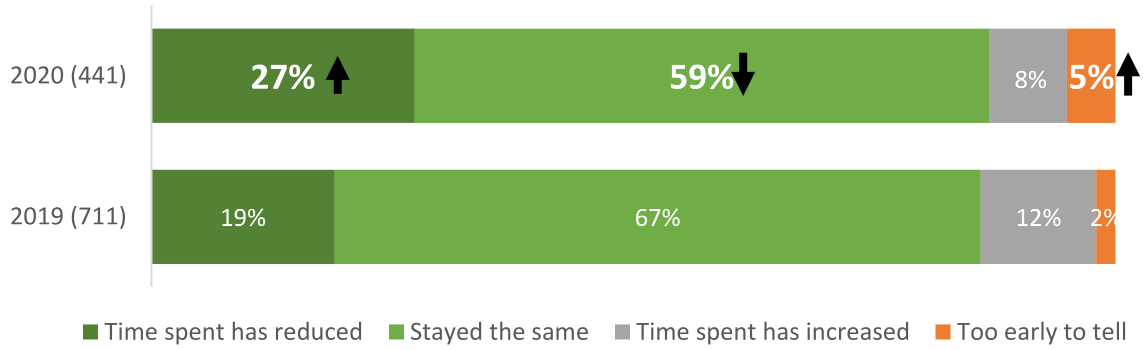
One in twenty (5%) have consolidated their water retail services with some of their other utilities, such as electricity, telephone or gas services into a single bill as a result of switching, again in line with the 4% who did so in 2019.

Results were largely consistent by organisation size.

With regard to the time savings achieved as a result of switching, a quarter (27%) of those who had switched in the last 12 months reported that the amount of time their organisation spends dealing with their water bills has reduced, significantly up from the 19% who did so in 2019.

The majority continue to report that it has stayed the same (59%), although this is significantly lower than the 67% who did so in 2019.

Figure 49: Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching?



E36 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

There were few significant differences by organisation size, with the exception that large organisations were less likely than average to say the amount of time had stayed the same (39%) and directionally more likely to say it had reduced (39%).

Table 14: Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching? (by organisation size)

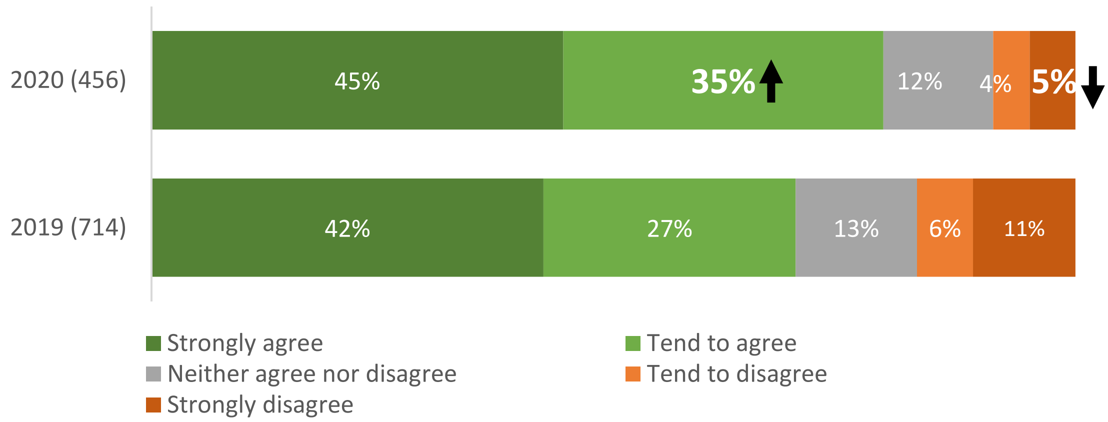
	Zero/ micro (0-9 employees) (225)	Small/ medium (10-249 employees) (179)	Small (10-49 employees) (132)	Medium (50-249 employees) (47)	Large (250+ employees) (33)
Time spent has reduced	27%	26%	25%	28%	39%
Stayed the same	59%	65%	64%	67%	**39%**↓
Time spent has increased	9%	7%	8%	4%	9%
Too early to tell	**5%**↑	**2%**↓	3%	0%	**12%**↑

E36 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

Four in five of those who had switched in the last 12 months (80%) agreed that it was worthwhile for them to switch, a significant increase since 2019 (69%), driven by a significant increase in those who tend to agree (from 27% to 35%).

Correspondingly there has been a significant decrease in the proportion who disagree that this is the case (from 18% to 8%).

Figure 50: Overall, taking the whole experience of switching into account, do you agree or disagree that it was worthwhile for you to switch?

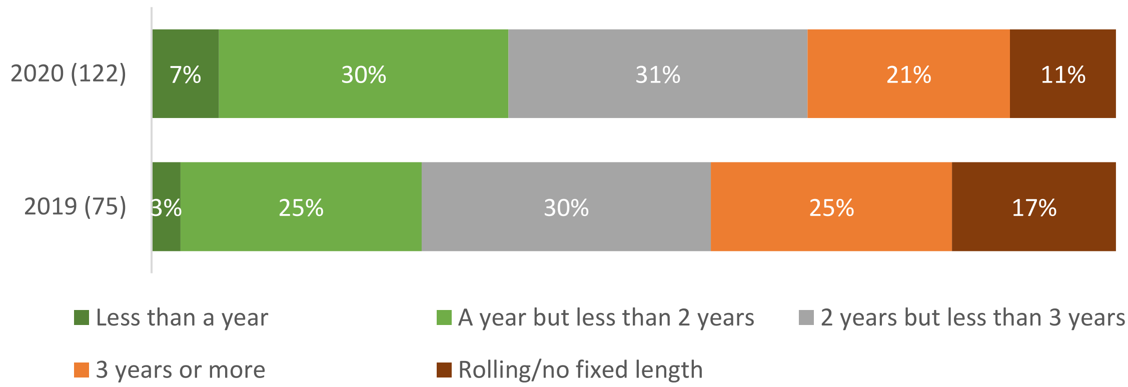


E37 Base: All switchers in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

4.6.3 Outcomes for re-negotiators

As for switchers, around one in ten (11%) of those who had renegotiated in the last 12 months reported that they entered into new contracts that were 'rolling' with no fixed length. Also similar to switchers, the majority (68%) of new contracts entered into by re-negotiators were less than 3 years in duration, while around a fifth (21%) exceeded 3 years. This pattern of contract duration closely resembles that of last year, and is similar regardless of organisation size.

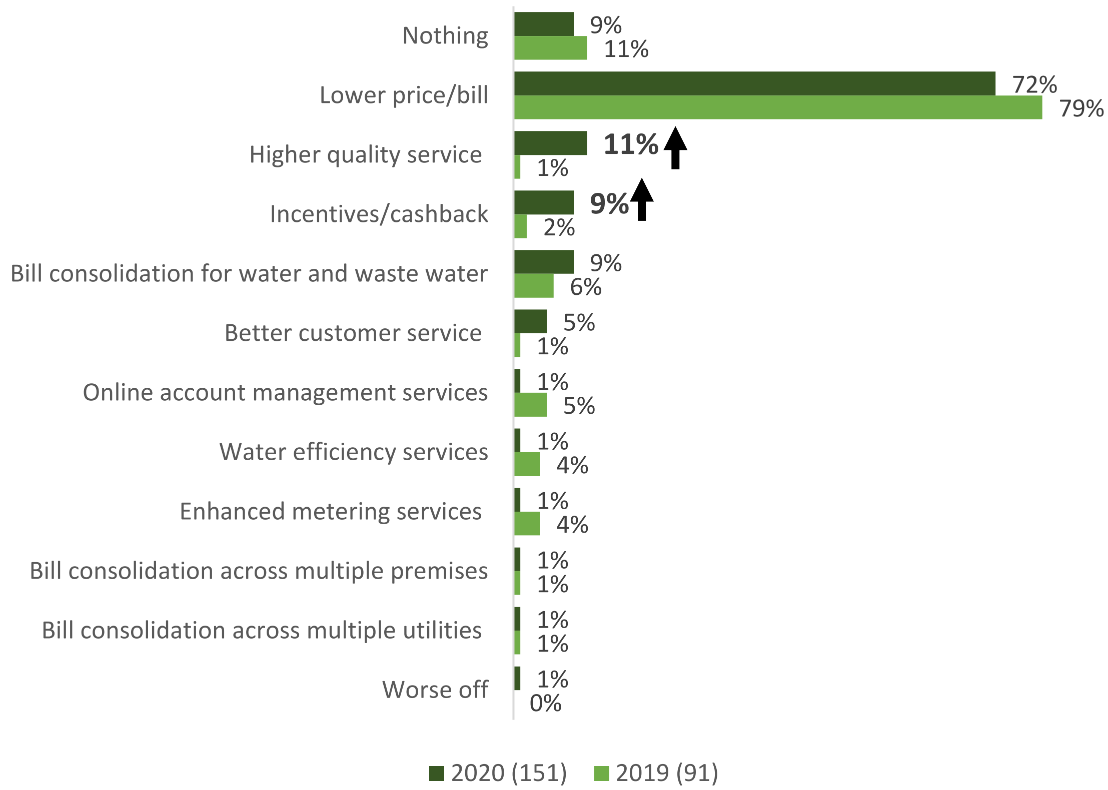
Figure 51: What is the total length of your new contract? This does not mean the time remaining on the contract but the length of the new contract from start to end.



FE1 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

Concerning potential benefits customers may have received as a result of re-negotiating, the great majority (91%) reported that they had received some form of benefit, with 9% reporting no benefit received, in line with the 11% who did so in 2019, and 1% reporting being worse off. Lower prices/bills was the leading benefit cited (72% cf. 79% in 2019) however significantly more mentioned higher quality service (11% cf. 1%) and incentives/cashback (9% cf. 2%), making these the second and third most mentioned benefits.

Figure 52: What benefits, if any, did you actually get from renegotiating?

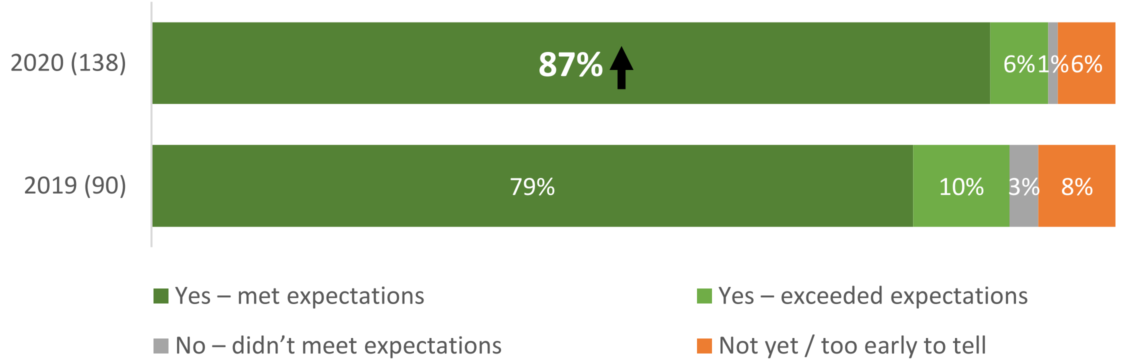


FE23 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Close to nine in ten (87%) of those who had renegotiated in the last 12 months who realised a benefit said that this met their expectations, a significant increase on 2019 (79%), and one in twenty (6%) said their expectations were exceeded. Only 1% said that the benefits did not meet their expectations.

These results are much in line with the results among those who had switched in the last 12 months.

Figure 53: Did the benefits meet your expectations?



FE24 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

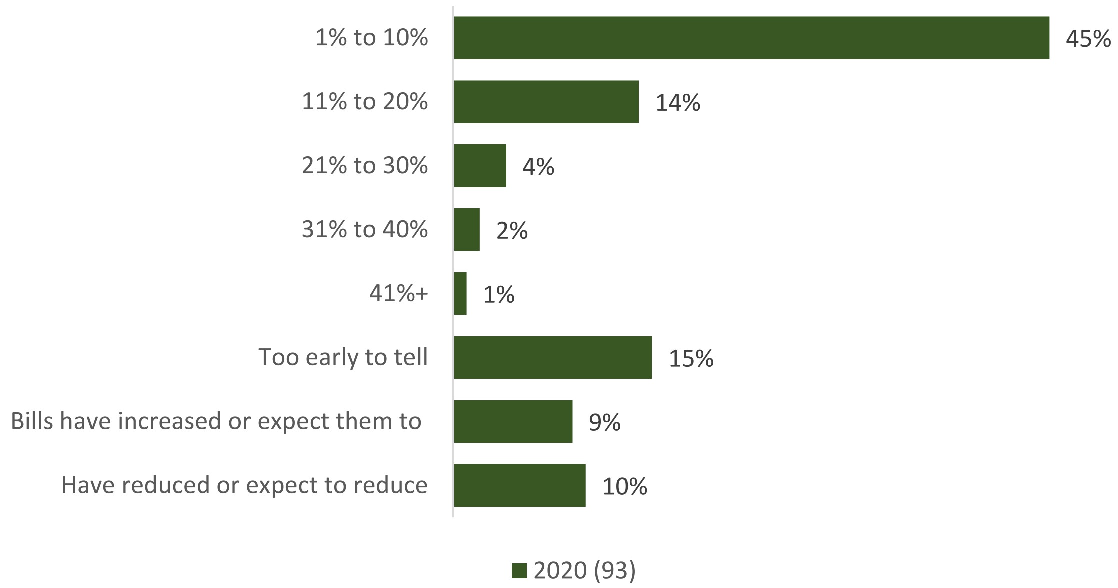
Two thirds (65%) of those who had renegotiated in the last 12 months said that they were better off compared to before they renegotiated, three in ten were about the same (30%) were about the same, and just 3% said that they were worse off.

As for switchers, the survey asked those who renegotiated to estimate the extent to which they had seen bill reductions as a result of renegotiating. Caution should be shown when considering the responses to this question, as the figures provided are purely estimates and cannot be taken to represent the actual savings realised.

Around three quarters (76%) reported or expected a reduction, while one in ten (9%) reported an increase and one in six (15%) said it was too early to tell. This pattern of results was similar to those for switchers.

The most commonly reported bill reduction from those who reported a reduction was a reduction of 1% to 10%, mentioned by 45% of those who had renegotiated in the last 12 months, or about two-thirds of those reporting a reduction.

Figure 54: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating, if at all?

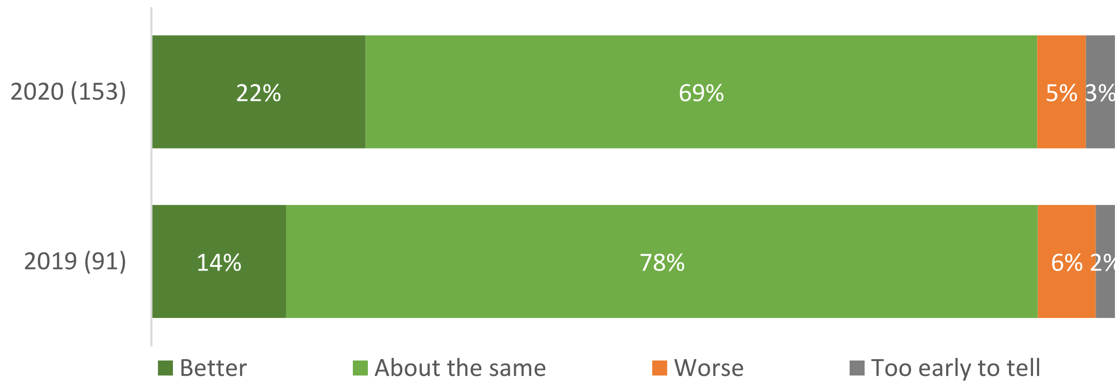


FE29 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

Whereas over one in five (22%) of those who had renegotiated in the last 12 months in 2019 said that they had received new water efficiency or leak detection services as a result of renegotiating, this has fallen significantly to less than one in ten (8%) in 2020.

When customers were asked whether the quality of the retail services were better, worse or about the same as before they re-negotiated, the pattern of response was very similar to that seen in 2019, with one in five (22%) saying it was better, seven in ten (69%) that it was about the same, one in twenty (5%) that it was worse, and 3% that it was too early to tell.

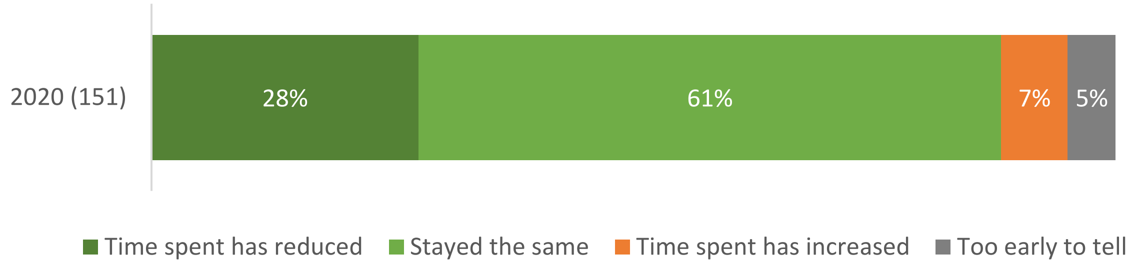
Figure 55: Is the quality of retail services like billing and meter-reading better, worse, or about the same as before you renegotiated?



FE32 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

Over a quarter (28%) of those who had renegotiated in the last 12 months reported that the time they spent dealing with their water bills had reduced since they renegotiated, and a further six in ten (61%) that it was about the same. Around one in twenty (7%) reported that it had increased, and a similar proportion (5%) that it was too early to tell.

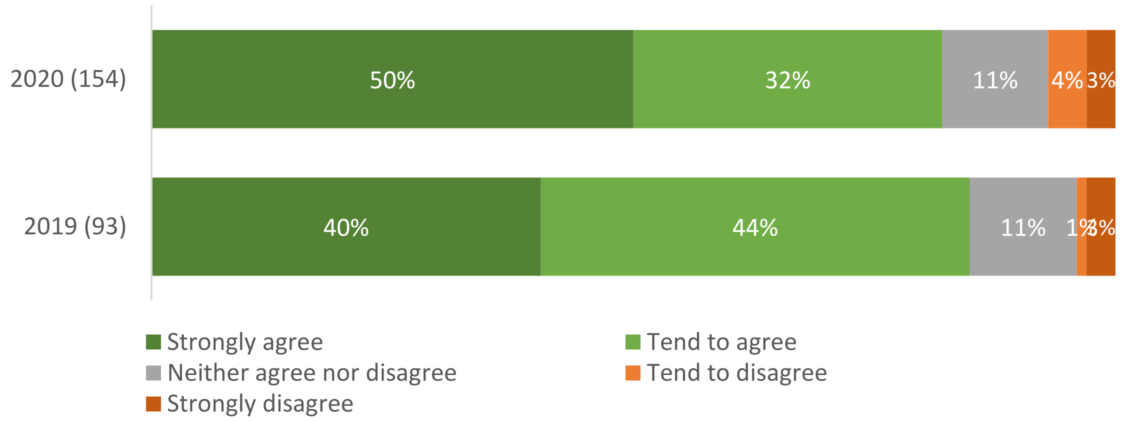
Figure 56: Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since you renegotiated with your existing provider?



FE36 Base: All re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

When re-negotiators were asked whether they agreed or disagreed that it was worthwhile for them to renegotiate a better deal with their existing retailer, the pattern of response was similar to that seen in 2019, with a large majority (82%) agreeing, and just one in twenty (7%) disagreeing.

Figure 57: Overall, taking the whole experience of renegotiating into account, do you agree or disagree that it was worthwhile for you to renegotiate a better deal with your existing retailer?



FE37 Base: All re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)

4.6.4 Contact with previous water and waste water retailer[10]

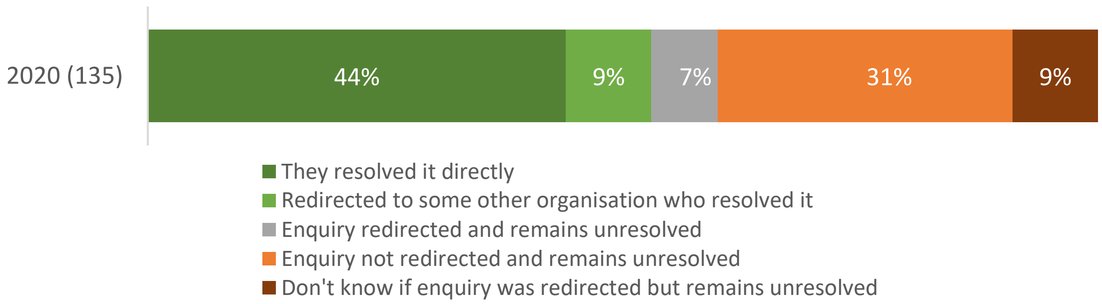
A third (34%) of those who had switched in the last 12 months had contacted their previous water and waste water retailer in the 12 months before they moved to their current water and waste water retailer, most commonly with a billing enquiry (68%), about an issue with a meter reading (8%), to find out about switching (6%), to make a complaint (6%), to report a leak (4%), about a sewerage problem (3%) or an issue with a water meter (2%).

This compares with one in five (18%) of all eligible customers who had contacted their water and waste retailer.

In less than half (44%) of instances the retailer resolved the issue directly, and a further one in ten (9%) issues were resolved following redirection to another organisation. This level of resolution is significantly lower than that for all eligible organisations, where the retailer resolved the issue directly in 77% of instances, and another organisation resolved it in 3% of instances.

Close to half (47%) of the issues were unresolved, and in most cases (31%) the enquiry was not redirected and remained unresolved.

Figure 58: Were they able to resolve your enquiry, or did they redirect you to another organisation?



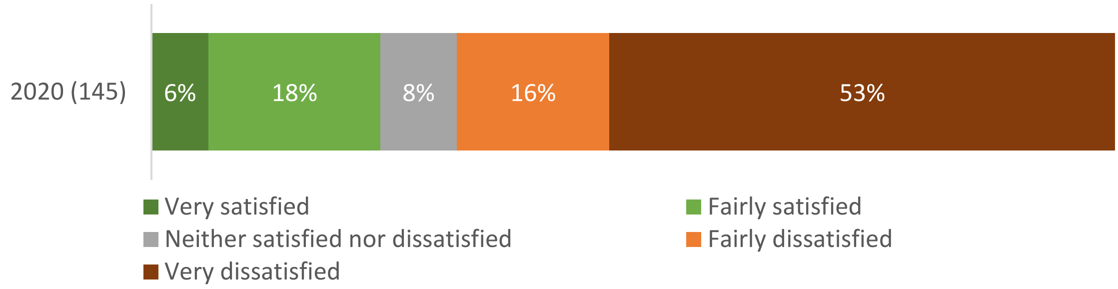
E19 Base: Switchers in the last 12 months who contacted their provider in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

Less than a quarter (23%) of those who had switched in the last 12 months were satisfied with their contact with their previous water and waste water retailer, and seven in ten (69%) were dissatisfied, including 53% who were very dissatisfied.

Clearly satisfaction was significantly lower among switchers than all eligible customers, with 61% of the latter group satisfied with their contact and one in six (16%) dissatisfied.

[10] Question wording for this section has changed so comparisons with 2019 are not appropriate.

Figure 59: How satisfied or dissatisfied were you with the contact with your water and waste water retailer overall?



E20 Base: Switchers in the last 12 months who contacted their provider in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)

Key reasons for dissatisfaction related to billing services (34%), poor customer service (25%), a lack of resolution (18%), the length of resolution (12%), a lack of communication (12%), difficulty in getting through on the phone (10%), high service charges (8%) and faults in the payment system (8%).

4.7 Overall customer views of the water market

4.7.1 Most important issues for water customers

There has been a significant decline in the proportion of those who have switched/renegotiated in the last 12 months who give a reliable water supply as an important issue for water customers (from 62% to 39%) such that this is no longer the most mentioned priority.

While the importance of a reliable water supply has also reduced among all eligible customers (from 72% to 57%), it remains the most commonly mentioned issue among this group.

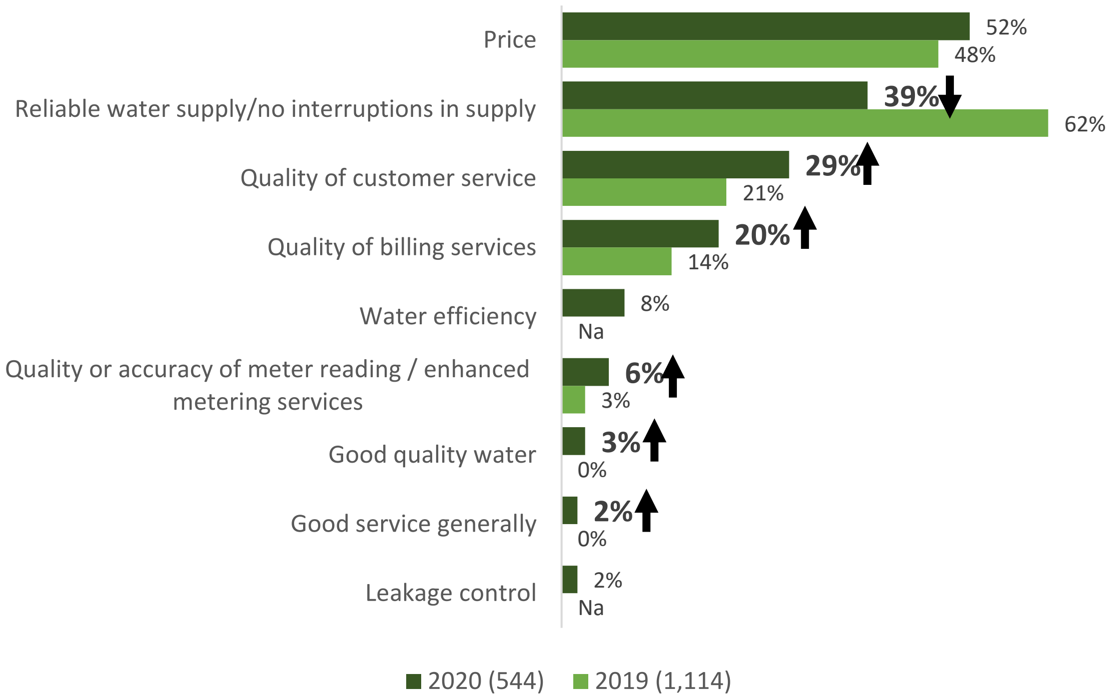
Price was mentioned by half (52%) of those who have switched/renegotiated in the last 12 months, in line with 2019 (48%), and is now the most commonly mentioned issue, and mentioned significantly more often among switchers/re-negotiators than among all eligible customers (29%).

However, there have been significant increases in the proportion of those who have switched/renegotiated in the last 12 months who feel the following are important:

- Quality of customer service (29% cf. 21%);
- Quality of billing services (20% cf. 14%);
- Quality or accuracy of meter reading / enhanced metering services (6% cf. 3%);
- Good quality water (3% cf. 0%);
- Good service generally (2% cf. 0%).

It is not possible to directly compare results with 2019 in relation to water efficiency and leakage control, as these were grouped together. However, on a grouped basis, only one in twenty (3%) mentioned these issues in 2019, as compared to one in ten (8%) who mentioned water efficiency in the latest survey.

Figure 60: Overall, and taking everything into account, what is important to you as a water customer?



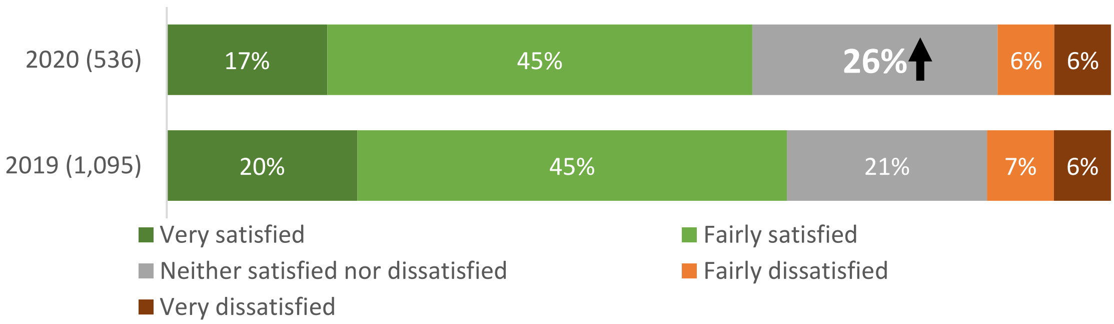
J1 Base: All switchers/re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

While price was the most commonly mentioned issue across all organisation sizes, mentioned by around half in each size band, among large organisations the quality of customer service was almost as important, mentioned by 42%.

4.7.2 Overall satisfaction with the water market

While the proportion of those who had switched/renegotiated in the last 12 months who were satisfied overall with the water market has declined from 65% in 2019 to 62% in the latest survey, the decline is not significant.

Figure 61: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?



J2 Base: All switchers/re-negotiators in the last 12 months (2020)/since market opening (2019) (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

By organisation size, medium organisations (with 50 to 249 employees) were more likely than average to be satisfied with the water market as a whole (75%).

While the differences for large organisations (250+ employees) are not statistically significant, they were directionally less likely to be satisfied (49%) and directionally more likely to be dissatisfied (18%).

Table 15: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole? (by organisation size)

	Zero/ micro (0-9 employees) (261)	Small/ medium (10-249 employees) (226)	Small (10-49 employees) (167)	Medium (50-249 employees) (59)	Large (250+ employees) (45)
Satisfied	62%	66%	63%	**75%** ↑	49%
Neither/nor	26%	23%	26%	**15%** ↓	33%
Dissatisfied	12%	11%	11%	10%	18%

J2 Base: All switchers/re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

4.8 Overview of differences by organisation size

4.8.1 Introduction

This section considers the views and experiences of organisations who have switched/renegotiated in the last 12 months in terms of size of organisation, with the size definitions used as follows:

- Zero/micro: 0 to 9 employees;
- Small/medium: 10 to 249 employees;
- Small: 10 to 49 employees;
- Medium: 50 to 249 employees;
- Large: 250 or more employees.

The findings may be useful for example to help to identify and understand any differences in engagement and views among different sized business customers.

It is worth noting that the profile of businesses varies considerably by size, with a significantly higher proportion than average of zero/micro businesses in the private sector (92% cf. 82%), and a significantly higher proportion than average of medium and large businesses in the public sector (25% and 33% respectively cf. 10%).

Table 16: Sector by organisation size

	Total (549)	Zero/ micro (271)	Small/ medium (228)	Small (168)	Medium (60)	Large (45)
Private business	82%	**92%** ↑	76%	82%	**62%** ↓	**51%** ↓
Public sector	10%	**3%** ↓	**14%** ↑	11%	**25%** ↑	**33%** ↑
Voluntary/non-profit	8%	**6%** ↓	9%	8%	13%	16%

S5 Base: All switchers/re-negotiators in the last 12 months (unweighted base sizes in parentheses)
Arrows indicate statistically significant difference from the average at the 95% level of confidence

Unsurprisingly, the proportion of organisations with more than one site increases with size, from 10% of zero/micros businesses, to 29% of small, 43% of medium and 100% of large businesses.

4.8.2 Searching and comparing

The likelihood of searching for information about alternative retailers decreases as size increases, noting that around a fifth of those with up to 49 employees said they did not search compared to one in twenty (5%) of large organisations.

Use of consultants was significantly higher than average among medium (21%) and large (26%) organisations, and use of the Open Water website was also higher than average among large organisations (18%).

Table 17: Which of the following, if any, have you used to search for information about alternative retailers? (by organisation size)

	Zero/ micro (0-9 employees) (242)	Small/ medium (10-249 employees) (198)	Small (10-49 employees) (146)	Medium (50-249 employees) (52)	Large (250+ employees) (38)
A broker	30%	38%	38%	38%	39%
Direct contact with another retailer	24%	28%	25%	37%	32%
A price comparison website	22%	17%	18%	12%	21%
I didn't search (none)	21%	20%	23%	13%	**5%** ↓
A retailer's website	**10%** ↓	13%	13%	13%	21%
A consultant	8%	10%	**6%** ↓	**21%** ↑	**26%** ↑
The Open Water website	5%	7%	5%	12%	**18%** ↑
Other (please specify)	5%	4%	5%	0%	8%

H1 Base: All switchers/re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

4.8.3 Motivations for switching

While there were no significant differences between different sizes of organisation in terms of the proportions who mentioned price as a motivation for switching, larger organisations were more likely than average to mention higher quality service (58%), better customer service (42%), bill consolidation across multiple premises (24%), and leakage control services (12%) as motivations.

Table 18: Why did you start looking into switching? Were any of the following reasons for looking into switching? (by organisation size) (Prompted)

	Zero/ micro (0-9 employees) (232)	Small/ medium (10-249 employees) (188)	Small (10-49 employees) (138)	Medium (50-249 employees) (50)	Large (250+ employees) (33)
Lower price/bill	67%	70%	69%	74%	82%
To get higher quality service (e.g. more detailed billing)	22%	26%	27%	22%	**58%**↑
To get better customer service (e.g. when I contact them)	17%	20%	20%	20%	**42%**↑
Bill consolidation across multiple premises	**2%**↓	5%	4%	8%	**24%**↑
Company decision (Inc. general review of bills)	**1%**↓	4%	4%	4%	**15%**↑
Leakage control services	3%	4%	4%	6%	**12%**↑
Someone/a broker/a consultant got in touch	40%	40%	39%	44%	**12%**↓

E12/E13/E15 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

When asked to take into account all the reasons for switching that they had mentioned, and to say which was the most significant in their decision to switch, large organisations were significantly less likely than average to say that price was the most significant reason for switching (31% cf. 55%), although price was still the most commonly mentioned reason among this group.

By contrast, large organisations were significantly more likely than average to say the main reason for their decision to switch was that they wanted a higher quality service (22% cf. 6%) and that they wanted to consolidate bills across multiple premises (16% cf. 2%).

Table 19: Taking into account all the reasons for switching that you've mentioned, which was the most significant in your decision to switch? (by organisation size)

	Zero/ micro (0-9 employees) (226)	Small/ medium (10-249 employees) (181)	Small (10-49 employees) (133)	Medium (50-249 employees) (48)	Large (250+ employees) (32)
Lower price/bill	57%	58%	56%	63%	**31%**↓
Dissatisfied with previous service provider	**6%**↑	2%	2%	2%	3%
To get higher quality service	5%	3%	4%	2%	**22%**↑
To get better customer service (e.g. when I contact them)	**2%**↓	**7%**↑	8%	6%	6%
Bill consolidation across multiple premises	0%	3%	3%	2%	**16%**↑

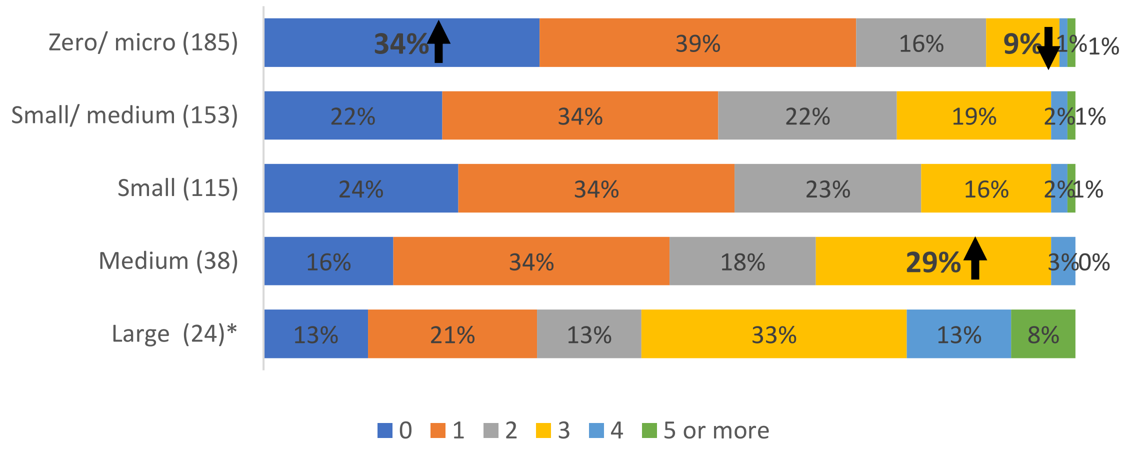
E22 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences from the average at the 95% level of confidence

4.8.4 Approach to switching

While the base size for large organisations is insufficient to support robust statistical analysis, the figure below clearly indicates that the likelihood of getting price quotations from a number of retailers increases with organisation size, such that nine in ten (87%) large organisations received at least one quotation, and two thirds (66%) received two or more.

A third (34%) of zero/micro organisations received no quotations.

Figure 62: How many, if any, different retailers did you receive price quotations from prior to switching? (by organisation size)

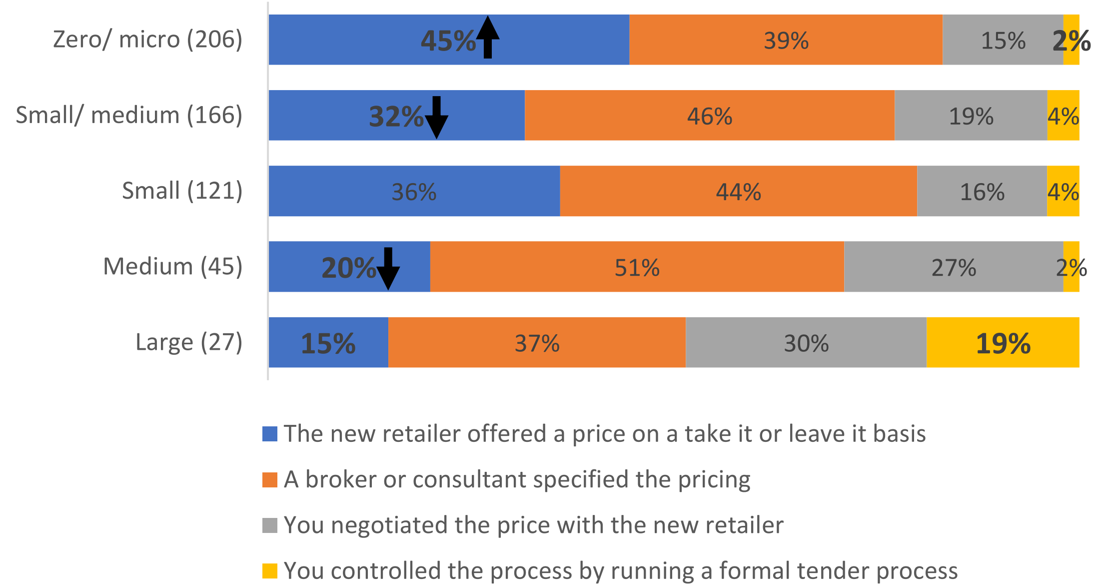


E4 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence
* indicates caution: low base (<30)

The likelihood of being offered a price by a retailer on a take it or leave it basis decreases as organisation size increases, from 45% of zero/micro organisations, to 15% of large organisations.

While overall only one in twenty (4%) controlled the process by running a formal tender, this rises to a fifth (19%) of large organisations (250+ employees), significantly higher than the average. Large organisations were also directionally more likely to have negotiated a price with the new retailer (30% cf. 17%).

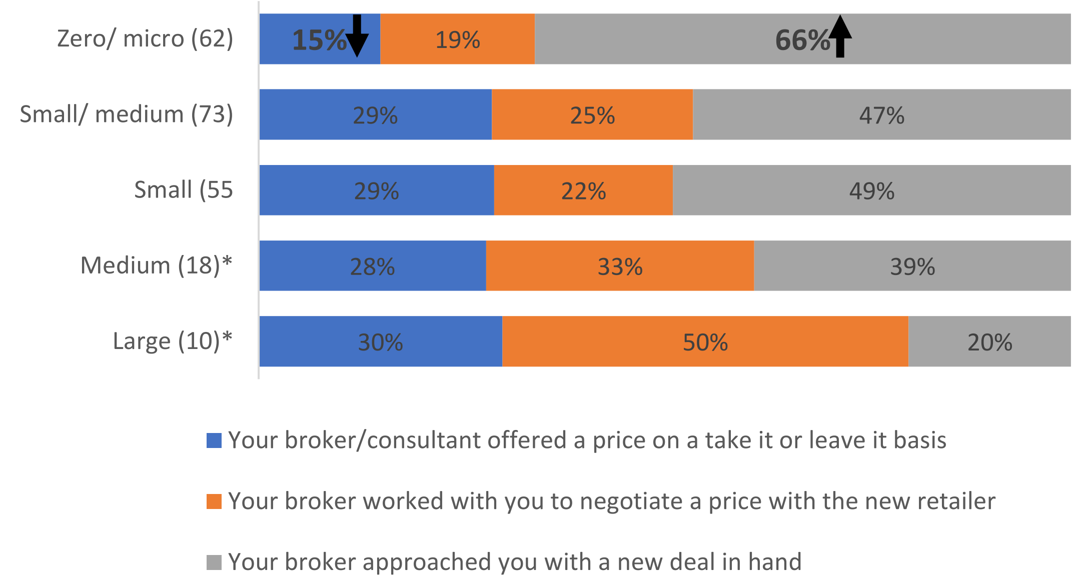
Figure 63: Which of the following best describes your experience of agreeing a price with your new retailer? (by organisation size)



E5 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

While base sizes limit statistically robust analysis, the pattern of results suggests that the likelihood of negotiating with a broker/consultant increases as organisation size increases, and the likelihood of the broker approaching with a new deal in hand decreases.

Figure 64: Which of the following best describes your experience of agreeing a price with a broker or consultant? (by organisation size)

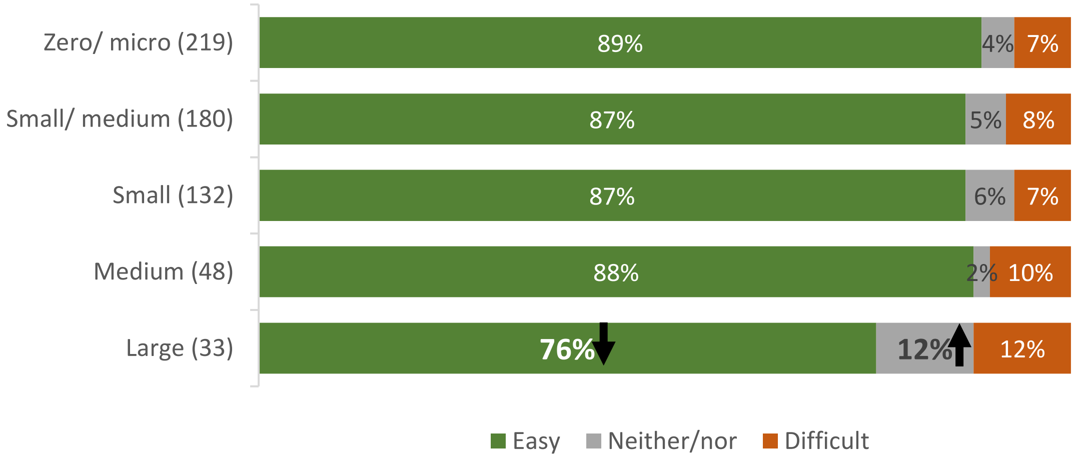


E6 Base: All switchers in the last 12 months who used a broker (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence
* indicates caution: low base (<30)

4.8.5 The process of switching

While the majority of organisations of all sizes found the process of switching retailer easy, large organisations were less likely than average to do so (76% cf. 87%).

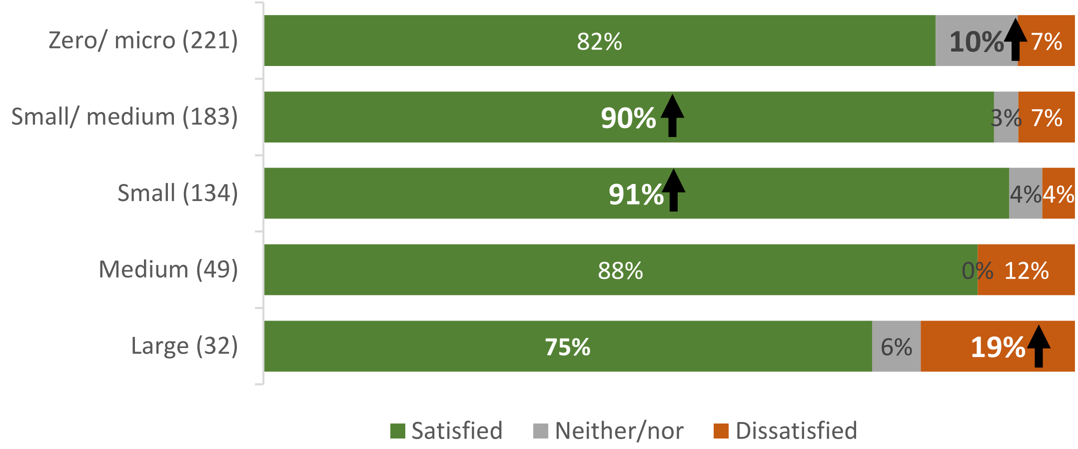
Figure 65: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer? (by organisation size)



E9 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

The pattern of results suggests that satisfaction with the time taken for the switch to take place tends to decrease as organisation size increases. One in five (19%) large organisations were dissatisfied in this respect.

Figure 66: How satisfied or dissatisfied were you with the time it took for the switch to take place? (by organisation size)

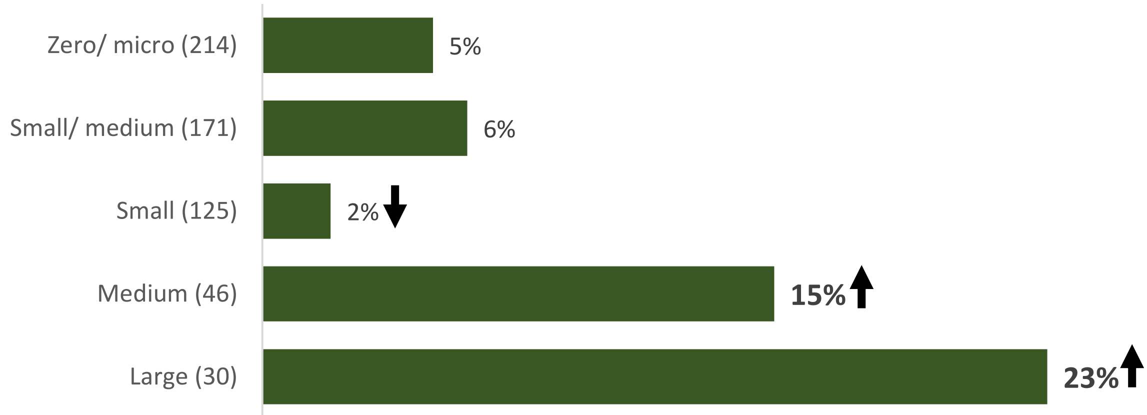


E11 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

4.8.6 Outcomes of switching

Medium and large organisations were more likely than average to report having received water efficiency or leak detection services as a result of switching (15% and 23% respectively, cf. 6%)

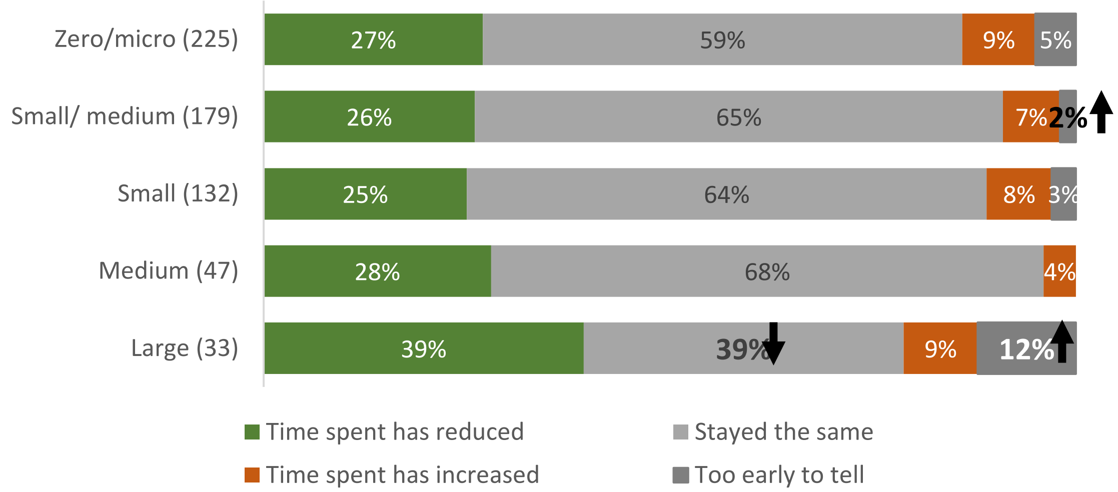
Figure 67: Do you now receive any new water efficiency or leak detection services as a result of switching?



E30 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Large organisations were directionally more likely than average to report that the time taken dealing with water bills each billing cycle has reduced (39% cf. 28%).

Figure 68: Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching? (by organisation size)



E36 Base: All switchers in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

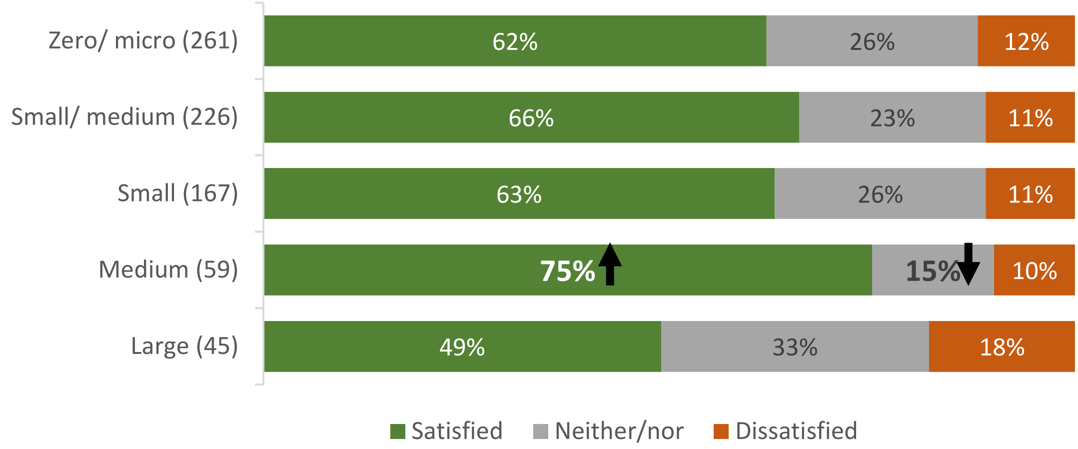
4.8.7 Overall customer views of the water market

When asked, overall, and taking everything into account, what is important to them as a water customer, while price was the most commonly mentioned issue among those who had switched or renegotiated in the last 12 months across all organisation sizes, mentioned by around half in each size band, among large organisations the quality of customer service was almost as important, mentioned by 42% (cf. average of 29%).

Medium organisations were more likely than average to be satisfied with the water market as a whole (75%).

While the differences for large organisations are not statistically significant, they were directionally less likely to be satisfied (49%) and directionally more likely to be dissatisfied (18%).

Figure 69: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole? (by organisation size)



J2 Base: All switchers/re-negotiators in the last 12 months (excluding don't know/refused – unweighted base sizes in parentheses)
Arrows indicate statistically significant differences over time at the 95% level of confidence

Appendix: Questionnaire employed

Ofwat – Non-Household Customer Research – Customer Insight Survey 2020

INTRO AND CALL MANAGEMENT **Representative survey**

***INTERVIEWER:* Read out**
Good morning/afternoon, please can I confirm that this is [ORGANISATION NAME]?
[If No then take new name and continue]
Could I speak to the person responsible for dealing with the site's utility providers, specifically its water and waste services?
My name is &%&%% and I am calling on behalf of the water regulator, Ofwat and the consumer watchdog, CCWater on behalf of BMG Research, an independent research organisation.
We are carrying out a survey to find out your experiences with water and waste water retail services. Would you be the appropriate person within your organisation to speak to about water and waste water retail services used at this site?
If no: Is there somebody else within your organisation who could answer questions regarding water supply to your company at that site?

Everything you say will be treated in confidence by BMG. It will not be shared with anyone else and neither Ofwat nor CCWater will receive any personally identifiable information. I also need to point out that this conversation is recorded and may be monitored for training and quality purposes. I can give you a link to Ofwat's, CCwater's or our privacy policy if you'd like.
If necessary: The survey takes about 15 minutes to complete.

INTERVIEWER: PROVIDE AS NECESSARY
Ofwat privacy policy: www.ofwat.gov.uk/publication/privacy-policy
CCWater privacy policy: www.ccwater.org.uk/privacystatement
BMG privacy policy: www.bmgresearch.co.uk/privacy
BMG TEAM CONTACT DETAILS: 0121 333 6006 or helpline@bmgresearch.co.uk or emma.osborne@bmgresearch.co.uk

MRS Freephone Number: 0800 975 9596
If the respondent doesn't wish to be contacted again for research purposes:
Are you happy for us to transfer your number to Ofwat or selected research organisations working on their behalf so that they can ensure they do not call you again in future?

Yes	Thank and close
No	Thank and close
Terminated before consent could be given	Close

***INTERVIEWER IF NECESSARY (i.e. if respondent asks how their details were obtained)*: Your number was selected from a list of commercially available numbers. Your contact details will at no time be released to any other parties and will only be used in connection with this survey.**

→ **Continue**

INTRO AND CALL MANAGEMENT **MOSL**

INTERVIEWER: **Read out**
Good morning/afternoon, please can I confirm that this is [ORGANISATION NAME]?
[If No then note name and go to Representative survey introduction]
[If Yes then] Could I speak to the person responsible for dealing with the site's utility providers, specifically its water and waste services?

My name is &%&%% and I am calling on behalf of the water regulator, Ofwat and the consumer watchdog, CCWater from BMG Research, an independent research organisation.

We are carrying out a survey to find out your experiences with water and waste water retail services and we want to find out whether the market is working well and delivering for you.

Would you be the appropriate person within your organisation to speak to about this?
If no: Is there somebody else within your organisation who could answer questions regarding your water and waste water retailer?

If necessary: The survey takes about 15 minutes to complete.

Everything you say will be treated in confidence by BMG. It will not be shared with anyone else and neither Ofwat nor CCWater will receive any personally identifiable information. I also need to point out that this conversation is recorded and may be monitored for training and quality purposes. I can give you a link to Ofwat's, CCW's or our privacy policy if you'd like.

INTERVIEWER: PROVIDE AS NECESSARY
Ofwat privacy policy: www.ofwat.gov.uk/publication/privacy-policy
CCWater privacy policy: www.ccwater.org.uk/privacystatement
BMG privacy policy: www.bmgresearch.co.uk/privacy
BMG TEAM CONTACT DETAILS: 0121 333 6006 or helpline@bmgresearch.co.uk or emma.osborne@bmgresearch.co.uk

MRS Freephone Number: 0800 975 9596
If the respondent doesn't wish to be contacted again for research purposes:
Are you happy for us to transfer your number to Ofwat or selected research organisations working on their behalf so that they can ensure they do not call you again in future?

Yes	☐ Thank and close
No	☐ Thank and close
Terminated before consent could be given	☐ Close

***INTERVIEWER IF NECESSARY (i.e. if respondent asks how their details were obtained)*: Your organisation was identified as having switched water retailer by MOSL, the Market Operator Services Limited, who shared this information for the purpose of this research only. Your number was selected from a list of commercially available numbers. Your contact details will at no time be released to any other parties and will only be used in connection with this survey.**

➔ **Continue**

Screening questions **Representative survey**

SR1 (Ask representative survey)
Is this business run from a business premises 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 premises
No fixed business premises (e.g. van/home residence)

SR2 (ASK if SR1 = 2 [no fixed business premises])
Just to clarify, so your organisation DOESN'T have ANY OTHER main premises?

No other main business premises – go to display 1 and terminate interview	☐	1
There are other main business premises other than my/someone else's home	☐	2
Refused go to display 1 and terminate interview	☐	98

If business does not operate from a business premises: DISPLAY 1

> **I'm sorry we only need to speak to organisations that do not operate mainly from home. Thank you for your time anyway and sorry to have disturbed you.**
>
> **INTERVIEWER - TERMINATE THE CALL**

Can I check whether your organisation is responsible for making decisions about and paying for water utilities, or whether someone other than the organisation, such as the landlord or management company, is responsible for this? Probe and code one only

Organisation makes its own decisions about utilities	☐	1
Decisions about utilities are made by a third party, e.g. landlord – capture details of third party if possible, then go to display 2 and terminate interview	☐	2
Refused	☐	98

If decisions made by a third party: DISPLAY 2

> **I'm sorry we only need to speak to organisations that are able to make their own decisions regarding water utilities.**
> **Thank you for your time anyway and sorry to have disturbed you.**
> **INTERVIEWER - TERMINATE THE CALL**

Screening questions **Representative and MOSL survey**

S4A (ASK ALL)
Firstly, can I ask how long ago was your organisation established (this includes under all ownerships and legal statuses)? Probe and code one only

Less than a year ago	☐	1
Between one and three years ago	☐	2
More than three years ago	☐	3
Don't know	☐	4

S4B (MOSL only and S4A=1)
Can I just confirm that your organisation has switched your water and/or waste water retailer or was it just a case of establishing a first account with a water and/or waste water retailer?

Interviewer, if necessary: water and waste water retailers are not responsible for the quality of the water received or for removing and processing sewerage.
Probe and code one only

Yes – have switched	☐	1
No – it was a first account	☐	2
Don't know	☐	3

S5 (ASK ALL)
Can I just check, are you a private business, a public sector organisation, or a voluntary/non-profit making business? Probe and code one only

Private business	☐	1
Public sector	☐	2
Voluntary/non-profit	☐	3

S6 (ASK ALL)
Does your organisation have more than one site?

Yes	☐	1
No	☐	2

S7 (ASK IF YES S6=1)
Is this site at which you are based…? Probe and code one only

A head office	☐	1
Branch or subsidiary	☐	2
A centre with a specific function	☐	3

S8 (ASK ALL**)**
Including yourself, how many people work for your organisation [IF S6=1: across all of your premises in the UK]?
***INTERVIEWER IF NECESSARY*: Please include both full time and part time staff and temporary or subcontract/casual staff who consider this their main place of work. If necessary: This is only your organisation and excludes any other organisations that may operate on the same site.**
Write in__________________
Interviewer: If don't know prompt with a range
1 (0 employees)
2-4
5-9
10-19
20-49
50-99
100-249
250+
Don't know
Refused

S8B (ASK WHERE SIC DESCRIPTION ON SAMPLE)
I have [READ OUT SIC DESCRIPTION ON SAMPLE**] as a general classification for your business. Does this sound about right?**

Yes	☐	1
No	☐	2

S8C (ASK if no [S8bB=2] or if no SIC description on sample)
What is the main business activity at this site? PROBE FOR AS MUCH DETAIL AS POSSIBLE AND WRITE IN

ASK THE FOLLOWING QUESTIONS IF NECESSARY, TO OBTAIN ENOUGH INFORMATION TO CODE:

- What is the main product or service of the business?
- What exactly is made or done at this site?
- What material or machinery does this involve using?
- What would you type into a search engine to find an organisation like yours?

____

(OFFICE CODE SIC 2 DIGIT)

S9 (ASK if more than 1 premises [S6=1])
Including that site, how many premises does your organisation operate from in the UK?
Interviewer: Record number of premises
Write in number
Don't know
Refused

S10 (ASK if more than 1 premises [S6=1])
Do you make decisions regarding water and waste water retail services for all sites within the organisation or just for the site at which you are based? Code one only

For all sites	☐	1
Just for that site	☐	2

S11 (ASK ALL)

What is your organisation's FULL postcode [IF S6=1: at that site where you are based]?

(if S7 =>1) **INTERVIEWER: This should be the postcode of the organisation's premises where the respondent (decision maker) primarily works.**

INTERVIEWER IF NECESSARY: **This will enable your responses to be mapped to the current water region but your organisation's postcode will NOT be included in the data that is passed to Ofwat.**

INTERVIEWER: The postcode you enter below will be checked against a list of valid entries and a display will appear if the code given is invalid.

Freetext - Record word for word	☐	90
Refused	☐	98

S12 (ASK if S6=1 and postcode NOT in Scotland)

Does your organisation have any premises in Scotland?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

S13 (Ask if postcode is in Scotland or Wales and if S6=1)

Does your organisation have any premises in England?

Yes

No - Thank and close Go to Display 3

DISPLAY if S12=yes

Please answer all questions in this survey focusing only on your experience in England [If eligible – **and high water consumption sites in Wales].**

***INTERVIEWER IF NECESSARY (i.e. if respondent asks what counts as a high consumption site in Wales)*:**

By a high consumption site in Wales, we are referring to sites which consume over 50 megalitres of water a year – equivalent to 50,000 cubic metres.

DISPLAY 3

Unfortunately, I can only interview people whose organisation is based in England or organisations in Wales consuming over 50 megalitres of water a year. Our system shows that your organisation does not fit this profile so I am unable to continue. **Thank you for your time anyway and sorry to have disturbed you.** ***INTERVIEWER - TERMINATE INTERVIEW***

SURVEY QUESTIONS

SECTION A. Awareness — Representative survey

AR1 (ASK representative survey)

Since April 2017, organisations have been able to change the company providing their water and waste water retail services – that is the company or companies that provide customer services, meter reading and billing - or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?

Interviewer, if necessary: water and waste water retailers are not responsible for the quality of the water received or for removing and processing sewerage. If necessary: 'Organisations' include businesses, charities and public sector organisations

Yes – aware	☐	1
No – not aware	☐	2
Refused	☐	98

SECTION B. Confirming switch — MOSL

BM1 (Ask of MOSL ONLY <u>and</u> S4A=2, 3,4)

Can I just confirm that your organisation has switched your water and/or waste water retailer?
INTERVIEWER, if respondent is unsure OR SAYS NO: "Our records show your switch was completed in [SWITCH MONTH FROM MOSL SAMPLE] and that you switched from [OUTGOING RETAILER ID] to [INCOMING RETAILER ID]"

Interviewer, if necessary: water and waste water retailers are not responsible for the quality of the water received or for removing and processing sewerage.

Probe and code one only

Yes - In the last 12 months	☐	1
Yes – longer ago	☐	2
No	☐	3
Don't know	☐	97
Refused	☐	98

BM2 (ASK if BM1=1,2 or S4B=1**)**

Just to double check, did your organisation actively <u>choose to switch</u> retailer? IF NO, CHECK: Can I confirm then that your organisation was moved to another water and waste water retailer automatically, without your organisation having taken a decision to move? (IF YES, CODE AS NO BELOW)

INTERVIEWER: If the respondent believes they were switched automatically <u>and not by choice</u> then they should NOT be coded as switched.

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

If NO, <u>move back to QBM1 and recode as 3</u>
If NO AND S4B/1, move back to S4B and <u>recode as 2</u>

If necessary: if the switch was made automatically then you are still with the retailers that your former water company transferred you to

BM3 (ASK if BM1=1,2 or S4B=1)
Have you switched more than once? Probe and code one only

No – just the once	☐	1
Yes – twice	☐	2
Yes – more than twice	☐	3
Don't know	☐	97
Refused	☐	98

BM4 (ASK MOSL)
Since April 2017 it is now also possible for organisations to renegotiate their contract with their existing retailer. Renegotiation might include securing incentives like a lower tariff, additional services or one-off offers like cashback. [BM1=1, 2 OR S4B=1: As well as having switched] [ALL MOSL: have you managed to renegotiate with your retailer]? Probe and code one only

[IF S4A/2-4: In the last 12 months] [IF S4A/1: Yes]	☐	1
[IF S4A/2-4: Longer ago]	☐	2
[MOSL: No]	☐	3
Don't know	☐	97
Refused	☐	98

BM5 (If BM4 = 1,2)
Have you renegotiated more than once?

No – just once	☐	1
Yes – twice	☐	2
Yes – more than twice	☐	3
Don't know	☐	97
Refused	☐	98

BM6 (Ask if both switched and renegotiated [BM1=1,2 2 or S4B=1 and BM4=1, 2])
Which did you do most recently: Switch or successfully renegotiate? Probe and code one only

Switched	☐	1
Renegotiated	☐	2
Don't know	☐	97
Refused	☐	98

SECTION C. Satisfaction Representative survey and MOSL (all)

DISPLAY 1: I'd like to ask about your current water and waste water retailer(s) – that is the company or companies that provide customer services, meter reading and billing. They are not responsible for the quality of the water you receive or for removing and processing sewerage.

C1 (ASK ALL)

***Overall*, how satisfied or dissatisfied are you with your current water and waste water retailer(s)?**

INTERVIEWER: Read out response options- apart from don't know or refused. Code one only

Very satisfied	☐	1
Fairly satisfied	☐	2
Neither satisfied nor dissatisfied	☐	3
Fairly dissatisfied	☐	4
Very dissatisfied	☐	5
Don't know	☐	97
Refused	☐	98

C2 (ASK if C1=4, 5)

Why are you dissatisfied?

INTERVIEWER: if respondent says water quality issue – probe for 'anything else?' Code all that apply

Water quality issue (e.g. cloudy water/strange taste)	☐	1
Waste water issue (e.g. cloudy water/strange taste)	☐	2
Price (e.g. too expensive)	☐	3
Customer service (e.g. slow to respond to issues, hard to get in contact with etc.)	☐	4
Billing issues (e.g. not receiving bills, incorrect charges)	☐	5
Metering issues (e.g. incorrect or infrequent readings)	☐	6
Other (please specify)	☐	7
Don't know	☐	97
Refused	☐	98

C3 (Ask if C1 =1, 2)

Are there any particular reasons why you are satisfied? What are they? Probe and code all that apply

No/no real reason	☐	1
Price (cheap/not expensive)	☐	2
Good customer service	☐	3
Experienced no/few problems	☐	4
Other (specify)	☐	5
Don't know	☐	97
Refused	☐	98

SECTION D. Behaviour in the market **Representative survey**

DR1 (ASK if AR1=1)
[IF S4A/2-4: Has your organisation switched provider for water and waste water retail services…?] [IF S4A/1: Has your organisation switched provider for water and waste water retail services?]
INTERVIEWER: Read out response options- apart from don't know or refused. Probe and code one only

[IF S4A/2-4: In the last 12 months] [IF S4A/1: Yes]	☐	1
[IF S4A/2-4: Longer ago]	☐	2
[AR1=1: No]	☐	3
Don't know	☐	97
Refused	☐	98

DR2 (ASK if DR1=1,2**)**
Just to double check, did your organisation actively <u>choose to switch</u> retailer? IF NO, CHECK: Can I confirm then that your organisation was moved to another water and waste water retailer automatically, without your organisation having taken a decision to move? (IF YES, CODE AS NO BELOW)

INTERVIEWER: If the respondent believes they were switched automatically <u>and not by choice</u> then they should NOT be coded as switched.

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

If NO, <u>move back to QDR1 and recode as 3.</u>

If necessary: *if the switch was made automatically then you are still with the retailer that your former water company transferred you to*

DR3 (ASK if DR1=1, 2)
Have you switched more than once? Probe and code one only

No – just once	☐	1
Yes – twice	☐	2
Yes – more than twice	☐	3
Don't know	☐	97
Refused	☐	98

DR4 (ASK if AR=1)
Since April 2017 it is now also possible for organisations to renegotiate their contract with their existing retailer. Renegotiation might include securing incentives like a lower tariff, additional services or one-off offers like cashback. [If not switched (DR1= 3, 97, 98): Since April 2017,] [If switched (DR1=1, 2): As well as having switched,] have you managed to successfully renegotiate a new deal or a new contract with your existing retailer? Probe and code one only

[IF S4A/2-4: In the last 12 months] [IF S4A/1: Yes]	☐	1
[IF S4A/2-4: Longer ago]	☐	2
[AR1=1: No]	☐	3
Don't know	☐	97
Refused	☐	98

DR5 (If DR4 = 1 or 2)
Have you renegotiated more than once? Probe and code one only

No – just once	☐	1
Yes – twice	☐	2
Yes – more than twice	☐	3
Don't know	☐	97
Refused	☐	98

DR6 (Ask if both switched and renegotiated – DR1=1,2 and DR4=1, 2)
Which did you do most recently: Switch retailer or successfully renegotiate? Probe and code one only

Switched	☐	1
Renegotiated	☐	2
Don't know	☐	97
Refused	☐	98

SECTION E. Switching Representative survey switchers and MOSL (switchers)

DISPLAY: IF (BM3=2, 3 and BM4=3, 97, 98) or (BM6=1) or (DR3=2, 3 and DR4=3, 97, 98) or (DR6=1)): Thinking only about your most recent switch…
DISPLAY: IF (BM1=1, 2 or S4B=1 **and BM4 = 1, 2) or (DR1 = 1,2 and DR4=1,2) Thinking now about your most recent switch…**
DISPLAY: IF (BM3=1 and BM4=3, 97, 98) or (DR3=1 and DR4=3, 97, 98): Thinking now about the water and waste water retailer you have switched to…

E1 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)
What is the total length of your new contract? This does not mean the time remaining on the contract but the length of the new contract from start to end.
Interviewer, if less than a year check they mean the total length of the new contract and NOT the time remaining on it. Code one only

Less than a year	☐	1
A year but less than 2 years	☐	2
2 years but less than 3 years	☐	3
3 years or more	☐	4
Rolling/no fixed length	☐	5
Don't know	☐	97
Refused	☐	98

E2 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

How did you *arrange* the switch?

Read out options and code most appropriate (one only).

Through a retailer website or direct contact with retailer	☐	1
Through a broker or consultant	☐	2
Other (please specify)	☐	3
Don't know	☐	97
Refused	☐	98

E3 (ASK if through a broker or consultant E2=2)

Which one(s)?

Interviewer probe and check for more than one.

Freetext (record word for word)
Don't know
Refused

E4 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

How many, if any, different retailers did you receive price quotations from prior to switching?

Interviewer: Record number of retailers

Write in number	☐	90
Don't know	☐	97
Refused	☐	98

E5 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

Which of the following best describes your experience of agreeing a price with your new retailer?

Read out options and code most appropriate (one only).

The new retailer offered a price on a take it or leave it basis	☐	1
You negotiated the price with the new retailer	☐	2
You controlled the process by running a formal tender process	☐	3
A broker or consultant specified the pricing	☐	4
Don't know	☐	97
Refused	☐	98

E6 (ASK if through a broker/consultant E2=2)

Which of the following best describes your experience of agreeing a price with broker or consultant?

Read out options and code most appropriate (one only).

Your broker/consultant offered a price on a take it or leave it basis	☐	1
Your broker worked with you to negotiate a price with the new retailer	☐	2
Your broker approached you with a new deal in hand	☐	3
Don't know	☐	97
Refused	☐	98

E7 (ASK If switched in the last 12 months BM1=1 or S4B=1 or DR1=1)

Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal? Probe as necessary and code one only

Yes – I approached my previous retailer	☐	1
Yes – my previous retailer approached me before I signed up with my new retailer	☐	2
Yes – my previous retailer approached me after I had signed up with my new retailer	☐	3
No – I didn't have any contact with my previous retailer regarding a better offer to stay with them	☐	4

Don't know	☐	97
Refused	☐	98

E8 (ASK if E7= 1/2/3]) **[Multi]**

What, if anything, did your previous retailer offer you to encourage you to stay?

Interviewer: Do not read out. Probe. Code all that apply

Nothing	☐	1
Cheaper tariff	☐	2
Additional services	☐	3
Other (please specify)	☐	4
Don't know	☐	97
Refused	☐	98

E9 (ASK If switched in the last 12 months BM1=1 or S4B=1 or DR1=1)

Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the <u>process</u> of switching retailer? Code one only

Interviewer, if necessary: this is not about the process of deciding to switch, but about the act of switching itself

Very easy	☐	1
Fairly easy	☐	2
Neither easy nor difficult	☐	3
Fairly difficult	☐	4
Very difficult	☐	5
Don't know	☐	97
Refused	☐	98

E10 (if E9 = 4-5)

Why do you say that? Probe fully. Record verbatim and code all that apply

ADD CODES FROM LAST TIME

Freetext (record word for word)	☐	1
Don't know	☐	97
Refused	☐	98

E11 (ASK If switched in the last 12 months BM1=1 or S4B=1 or DR1=1)

How satisfied or dissatisfied were you with the time it took for the switch to take place? Code one only

Very satisfied	☐	1
Fairly satisfied	☐	2
Neither satisfied nor dissatisfied	☐	3
Fairly dissatisfied	☐	4
Very dissatisfied	☐	5
Don't know	☐	97
Refused	☐	98

E12 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2) **[Multi]**
Why did you start looking into switching?
Interviewer: Do not read out. Probe. Code all that apply

Lower price/bill	☐	1
To get higher quality service (e.g. more detailed billing)	☐	2
To get better customer service (e.g. when I contact them)	☐	3
Dissatisfied with previous service provider	☐	4
Bill consolidation for water and waste water	☐	5
[if S6=1:] Bill consolidation across multiple premises	☐	6
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	7
Incentives/cashback	☐	8
Online account management services	☐	9
Water efficiency services	☐	10
Leakage control services	☐	11
Enhanced metering services	☐	12
Someone/a broker/a consultant got in touch	☐	13
Other (please specify)	☐	14
Don't know	☐	97
Refused	☐	98

E13 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2) **[Multi]**
Were any of the following reasons for looking into switching?
SHOW WHERE CODES NOT MENTIONED IN E12– as indicated
Interviewer: Read out and code all that apply

Lower price/bill CODE 1	☐	1
To get higher quality service CODES 2, 3, 4	☐	2
To consolidate bills CODES 5, 6, 7	☐	3
Incentives/cashback CODE 8	☐	4
Online account management services CODE 9	☐	5
Water efficiency services CODE 10	☐	6
Leakage control services CODE 11	☐	7
Enhanced metering services CODE 12	☐	8
Prompted by a broker or consultant getting in touch CODE 13	☐	9
None of these	☐	10

E14 (ASK if higher quality service – E12=2, 3, 4; E13=2) [Multi]
What was it specifically about the service that you wanted to improve?
Interviewer: Read out and code all that apply

More detailed billing	☐	1
More accurate billing	☐	2
Different/better billing frequency	☐	3
Different/better payment method	☐	4
New/different/better metering arrangements	☐	5
New/different/better meter reading arrangements	☐	6
Better service when contact the provider	☐	7
Other (please specify)	☐	8
	☐	9

E15 (ASK if to consolidate bills –E13=3) [Multi]
In what way did you want to consolidate your bills?
Interviewer: Read out and code all that apply

For water and waste water	☐	1
[if S6=1] Across multiple premises	☐	2
Across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	3
Other (please specify)	☐	4
Don't know	☐	5
Refused	☐	6

E16 (ASK if prompted by a broker or consultant – E12=13; E13=9) [Multi]
What did the broker or consultant that got in touch offer you?
Interviewer: Read out and code all that apply

Lower price/bill	☐	1
Higher quality service	☐	2
To consolidate bills	☐	3
Incentives/cashback	☐	4
Online account management services	☐	5
Water efficiency services	☐	6
Leakage control services	☐	7
Enhanced metering services	☐	8
To offer you deals on other utilities such as gas and electricity as well as water	☐	9
Other (please specify)	☐	10
Don't know	☐	11
Refused	☐	12

E17 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)
Thinking about your previous water and waste water retailer, did you contact them with any enquiry in the 12 months before you moved to your current water and waste water retailer?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

E18 (ASK if contacted E17=1) [Multi]
What did you contact them about?
INTERVIEWER: Probe for most recent contact. Do not prompt. Code one only

Billing enquiry	☐	1
To report a leak	☐	2
Sewerage problem	☐	3
Loss of supply after icy weather	☐	4
Issue with water meter	☐	5
Issue with meter reading	☐	6
No supply / supply issue	☐	7
Water quality	☐	8
Water pressure	☐	9
To make a complaint	☐	10
To change to/ask for a water meter	☐	11
To find out about switching	☐	12
To ask about other services such as trade effluent permits/ developer services	☐	13
Don't know	☐	97
Refused	☐	98

E19 (**ASK if contacted E17=1**)
Were they able to resolve your enquiry, or did they redirect you to another organisation? Probe and code one only

They resolved it directly	☐	1
Redirected to some other organisation who resolved it	☐	2
Enquiry redirected and remains unresolved	☐	3
Enquiry not redirected and remains unresolved	☐	4
Don't know if enquiry was redirected but remains unresolved	☐	5
Don't know	☐	97
Refused	☐	98

E20 (**ASK if contacted E17=1**)
How satisfied or dissatisfied were you with the contact with your previous water and waste water retailer overall? Code one only

Very satisfied	☐	1
Fairly satisfied	☐	2
Neither satisfied nor dissatisfied	☐	3
Fairly dissatisfied	☐	4
Very dissatisfied	☐	5
Don't know / can't recall	☐	97
Refused	☐	98

E21 (ASK if E20=4, 5)
Why were you dissatisfied?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

E22 (ASK If switched BM1=1, 2 or DR1=1, 2) **[Single]**
Taking into account all the reasons for switching that you've mentioned, which was the most significant in your decision to switch?
Interviewer: Display responses from E12/E13/E15/E16 Probe, prompt as necessary but wait for response first

ALL CODES FROM E12-E16 and also add in higher quality service if E12 is not 2 but E20=4, 5	☐	1
	☐	2
	☐	3
	☐	4
	☐	5

E23 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2) **[Multi]**
What benefits, if any, did you actually get from switching?
INTERVIEWER: Probe but do not prompt. Code all that apply

Nothing	☐	1
Lower price/bill	☐	2
Higher quality service (e.g. more detailed billing)	☐	3
Better customer service (e.g. when I contact them)	☐	4
Bill consolidation for water and waste water	☐	5
[if S6=1:] Bill consolidation across multiple premises	☐	6
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	7
Incentives/cashback	☐	8
Online account management services	☐	9
Water efficiency services	☐	10
Leakage control services	☐	11
Enhanced metering services	☐	12
Other (please specify)	☐	13
Worse off	☐	14
Don't know	☐	97
Refused	☐	98

[include a logic check that prompts for codes mentioned in E12 if not mentioned in E23] Can I just check if you have benefited from….?

E24 (ASK if E23 is ≠ 'nothing' [1] and E23 ≠ 'worse off' [14])
Did the benefits meet your expectations? Probe and code one only

Yes – met expectations	☐	1
Yes – exceeded expectations	☐	2
No – didn't meet expectations	☐	3
Not yet / too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

E25 (ASK if E24=3)
You say the benefits didn't meet your expectations. Can you say why this was?
INTERVIEWER: probe to see if retailer or broker promised something that wasn't delivered

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

E26 (ASK if E23 ≠ to 'worse off' [14])

Overall, with regard to water and waste water retail services would you say you are better off, worse off or about the same now compared with before you switched? Code one only

Better off	☐	1
Worse off	☐	2
About the same	☐	3
Unsure / too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

E27 (ASK if E23 = 'worse off' [14] or E26 = 'worse off' [2])

You say that you are worse off as a result of switching. Can you say why this is?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

E28 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

Can you tell me approximately how much your organisation pays for your water and waste water services per year, [if S6=1: across all premises]?

Interviewer: Record figure if this is given spontaneously, otherwise prompt with bands.

Freetext (Record exact value)	☐	90
Less than £500	☐	1
£500 up to £999	☐	2
£1,000 up to £1,999	☐	3
£2,000 up to £9,999	☐	4
£10,000 up to £100,000	☐	5
More than £100,000	☐	6
Don't know	☐	97
Refused	☐	98

E29 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer, if at all? You can provide this answer in pounds sterling if you prefer

Interviewer, if necessary: if respondent can only answer in pounds, ask for the savings made/expected ANNUALLY and record in £'s

Interviewer, if necessary: probe for whether or not there has been a reduction or if they are unable to comment yet. Probe on the basis of what they've said to you in the interview so far

No reduction (0%)	☐	1
Write in %	☐	2
Write in £ - ANNUAL FIGURE	☐	3
Too early to tell	☐	4
No reduction but actually bills have increased or expect them to increase	☐	5
Don't know but have reduced or expect to reduce	☐	97
Don't know	☐	99
Refused	☐	98

E30 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of switching?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

E31 (ASK if E30=1 and E29=2, 3, 97**)**

Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services? Probe and code one only

Entirely from a lower tariff	☐	1
Mostly from a lower tariff	☐	2
Equally from a lower tariff and water efficiency/leak detection services	☐	3
Mostly from water efficiency/leak detection services	☐	4
Entirely from water efficiency/leak detection services	☐	5
Other (specify)	☐	6
Don't know	☐	97
Refused	☐	98

E32 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)

Is the quality of retail services like billing and meter-reading from your new retailer better, worse, or about the same as your previous retailer?

INTERVIEWER: Read out response options- apart from too early to tell, don't know or refused. Code one only

Better	☐	1
About the same	☐	2
Worse	☐	3
Too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

E33 (ASK if switched BM1=1, 2 or DR1=1, 2, has more than one premises S6=1, and E12 ≠ 6 or E23 ≠ 6)

As a result of switching, have you consolidated your water bill across multiple premises into a single bill?

INTERVIEWER: Read out response options as necessary- apart from don't know or refused. Code one only

Yes – consolidated across premises	☐	1
No – did not consolidate across premises	☐	2
Don't know	☐	97
Refused	☐	98

Display if E23 = 6:
You mentioned that you have benefited from bill consolidation across multiple premises…

E34 (Ask if E33=1 OR E23=6)
How many premises that were previously billed separately have now been consolidated into a single bill?
Interviewer: Record number of premises

Write in number	☐	90
Don't know	☐	97
Refused	☐	98

E35 (Ask if switched BM1=1, 2 or S4B=1 or DR1=1, 2 and E12≠ 7 or E23 ≠ 7)
As a result of switching, have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas into a single bill?
INTERVIEWER: Read out response options as necessary- apart from don't know or refused. Code one only

Yes – consolidated with other utilities	☐	1
No – did not consolidate with other utilities	☐	2
Don't know	☐	97
Refused	☐	98

E36 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)
Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching? Probe and code one only

Time spent has increased	☐	1
Time spent has reduced	☐	2
Stayed the same	☐	3
Too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

E37 (ASK If switched BM1=1, 2 or S4B=1 or DR1=1, 2)
Overall, taking the whole experience of switching into account, do you agree or disagree that it was worthwhile for you to switch? Code one only

Strongly agree	☐	1
Tend to agree	☐	2
Neither agree nor disagree	☐	3
Tend to disagree	☐	4
Strongly disagree	☐	5
Don't know	☐	97
Refused	☐	98

SECTION F. Renegotiating Representative survey and MOSL (renegotiators)

<u>DISPLAY:</u> IF (BM5 = 2, 3 or BM6 = 2) or (DR5=2,3 or DR6=2) Thinking <u>only</u> about your most recent successful renegotiation…
<u>DISPLAY:</u> IF (BM1=2, 3 and BM5 = 2, 3 or BM6 = 2) or (DR1 = 1,2 and DR5=2,3 or DR6=2) Thinking <u>now</u> about your most recent successful renegotiation…

FE1 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
What is the total length of your new or renewed contract? This does not mean the time remaining on the contract but the length of the new or renewed contract from start to end.
Interviewer, if less than a year check they mean the total length of the new contract and NOT the time remaining on it

Less than a year	☐	1
A year but less than 2 years	☐	2
2 years but less than 3 years	☐	3
3 years or more	☐	4
Rolling/no fixed length	☐	5
Don't know	☐	97
Refused	☐	98

FE2 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
How did you renegotiate?
Interviewer if necessary: Read out options and code one only

Through a retailer website or direct contact with retailer	☐	1
Through a broker or consultant	☐	2
Other (please specify)	☐	3
Don't know	☐	97
Refused	☐	98

FE5 (ASK if through a retailer website/direct contact with retailer/other FE2=1)
Which of the following best describes you engagement with your retailer regarding the renegotiation? Read out and code one only

They were happy to discuss a new price and/or services	☐	1
They offered a take it or leave it new deal	☐	2
They were reluctant to discuss a new price and/or services	☐	3
Don't know	☐	97
Refused	☐	98

F3 (ASK if renegotiated BM4=1, 2 or DR4=1, 2)
Before you renegotiated, did you explore what else was on offer with other retailers?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

FE4 (ASK If renegotiated in the last 12 months BM4=1 or DR4=1 and F3 =1)
How many, if any, different retailers did you receive price quotations from prior to renegotiating or getting a new deal?
Interviewer: Record number of retailers

Write in number	☐	90
Don't know	☐	97
Refused	☐	98

FE12 (ASK If renegotiated BM4=1, 2 or DR4=1, 2) **[Multi]**
Why did you start looking into renegotiating? INTERVIEWER: Probe but do not prompt. Code all that apply

Lower price/bill	☐	1
To get higher quality service (e.g. more detailed billing)	☐	2
To get better customer service (e.g. when I contact them)	☐	3
Bill consolidation for water and waste water	☐	4
[if S6=1:] Bill consolidation across multiple premises	☐	5
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	6
Incentives/cashback	☐	7
Online account management services	☐	8
Water efficiency services	☐	9
Leakage control services	☐	10
Enhanced metering services	☐	11
Other (please specify)	☐	12
Don't know	☐	97
Refused	☐	98

FE13 (ASK If renegotiated BM4=1, 2 or DR4=1, 2) **[Multi]**
Were any of the following reasons for looking into renegotiating?
SHOW WHERE CODES NOT MENTIONED IN F6– as indicated
Interviewer: Read out and code all that apply

Lower price/bill CODE 1	☐	1
To get higher quality service CODES 2, 3, 4	☐	2
To consolidate bills CODES 5, 6, 7	☐	3
Incentives/cashback CODE 8	☐	4
Online account management services CODE 9	☐	5
Water efficiency services CODE 10	☐	6
Leakage control services CODE 11	☐	7
Enhanced metering services CODE 12	☐	8
Prompted by a broker or consultant getting in touch CODE 13	☐	9
None of these	☐	10

FE14 (ASK if higher quality service – FE12=2, 3, 4; FE13=2) [Multi]
What was it specifically about the service that you wanted to improve?
Interviewer: Read out and code all that apply

More detailed billing	☐	1		
More accurate billing	☐	2		
Different/better billing frequency	☐	3		
Different/better payment method	☐	4		
New/different/better metering arrangements	☐	5		
New/different/better meter reading arrangements	☐	6		
Better service when contact the provider	☐	7		
Other (please specify)	☐	8	☐	1

FE15 (ASK if to consolidate bills –FE13=3) [Multi]
In what way did you want to consolidate your bills?
Interviewer: Read out and code all that apply

For water and waste water	☐	1		
[if S6=1] Across multiple premises	☐	2		
Across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	3		
Other (please specify)	☐	4		
Don't know	☐	5		
Refused	☐	6	☐	9

FE16 (ASK if prompted by a broker or consultant – FE12=13; FE13=9) [Multi]
What did the broker or consultant that got in touch offer you?
Interviewer: Read out and code all that apply

Lower price/bill	☐	1
Higher quality service	☐	2
To consolidate bills	☐	3
Incentives/cashback	☐	4
Online account management services	☐	5
Water efficiency services	☐	6
Leakage control services	☐	7
Enhanced metering services	☐	8
To offer you deals on other utilities such as gas and electricity as well as water	☐	9
Other (please specify)	☐	10
Don't know	☐	11

Refused ☐ 12

FE22 (ASK If renegotiated BM4=1, 2 or DR4=1, 2) **[Single]**
Taking into account all the reasons for renegotiating that you've mentioned, which was the most significant in your decision to renegotiate?
Interviewer: Display responses from FE12/FE13/FE15/FE16 Probe, prompt as necessary but wait for response first and code one only

	☐	1
	☐	2

FE23 (ASK If renegotiated BM4=1, 2 or DR4=1, 2**) [Multi]**
What benefits, if any, did you actually get from renegotiating? INTERVIEWER: Probe but do not prompt. Code all that apply

Nothing	☐	1
Lower price/bill	☐	2
Higher quality service (e.g. more detailed billing)	☐	3
Better customer service (e.g. when I contact them)	☐	4
Bill consolidation for water and waste water	☐	5
[if S6=1:] Bill consolidation across multiple premises	☐	6
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)	☐	7
Incentives/cashback	☐	8
Online account management services	☐	9
Water efficiency services	☐	10
Leakage control services	☐	11
Enhanced metering services	☐	12
Other (please specify)	☐	13
Worse off	☐	14
Don't know	☐	97
Refused	☐	98

[include a logic check that prompts for codes mentioned in FE12 if not mentioned in FE23] Can I just check if you have benefited from….?

FE24 (ASK if FE23 is ≠ 'nothing' [1] and ≠ 'worse off' [14])
Did the benefits meet your expectations?
Interviewer: read out and clarify where necessary. Code one only

Yes – met expectations	☐	1
Yes – exceeded expectations	☐	2
No – didn't meet expectations	☐	3
Not yet / too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

FE25 (Ask if FE24=3)
You say the benefits didn't meet your expectations. Can you say why this was?
INTERVIEWER: probe to see if retailer or broker promised something that wasn't delivered

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

FE26 (ASK if FE23 ≠ to 'worse off' [14])
Overall, with regard to water and waste water retail services would you say you are better off, worse off or about the same now compared with before you renegotiated? Code one only

Better off	☐	1
Worse off	☐	2
About the same	☐	3
Unsure / too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

FE27 (ASK if FE23 = 'worse off' [14] or FE26 = 'worse off' [2])
You say that you are worse off as a result of renegotiating a new deal with your existing provider. Can you say why this is?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

FE28 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
Can you tell me approximately how much your organisation pays for your water and waste water services per year, [if S6=1: across all premises]?
Interviewer: Record figure if this is given spontaneously, otherwise prompt with bands

Freetext (Record exact value)	☐	90
Less than £500	☐	1
£500 up to £999	☐	2
£1,000 up to £1,999	☐	3
£2,000 up to £9,999	☐	4
£10,000 up to £100,000	☐	5
More than £100,000	☐	6
Don't know	☐	97
Refused	☐	98

FE29 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating, if at all? You can provide this answer in pounds sterling if you prefer
Interviewer, if necessary: if respondent can only answer in pounds, ask for the savings made/expected ANNUALLY and record in £'s
Interviewer, if necessary: probe for whether or not there has been a reduction or if they are unable to comment yet. Probe on the basis of what they've said to you in the interview so far

No reduction (0%)	☐	1
Write in %	☐	2
Write in £ - ANNUAL FIGURE	☐	3
Too early to tell	☐	4
No reduction but actually bills have increased or expect them to increase	☐	5
Don't know but have reduced or expect to reduce	☐	97
Don't know	☐	99
Refused	☐	98

FE36 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since you renegotiated with your existing provider?
Probe and code one only

Time spent has increased	☐	1
Time spent has reduced	☐	2
Stayed the same	☐	3
Too early to tell	☐	4
Don't know	☐	5

FE30 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of renegotiating?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

FE31 (ASK if FE30=1 and FE29=2, 3, 97)
Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services? Probe and code one only

Entirely from a lower tariff	☐	1
Mostly from a lower tariff	☐	2
Equally from a lower tariff and water efficiency/leak detection services	☐	3
Mostly from water efficiency/leak detection services	☐	4
Entirely from water efficiency/leak detection services	☐	5
Other (specify)	☐	95
Don't know	☐	97
Refused	☐	98

FE32 (ASK If renegotiated BM4=1, 2 or DR4=1, 2)
Is the quality of retail services like billing and meter-reading better, worse, or about the same as before you renegotiated?
INTERVIEWER: Read out response options- apart from too early to tell, don't know or refused. Code one only

Better	☐	1
About the same	☐	2
Worse	☐	3
Too early to tell	☐	4
Don't know	☐	97
Refused	☐	98

FE37 (ASK If renegotiated   BM4=1, 2 or DR4=1, 2)
Overall, taking the whole experience of renegotiating into account, do you agree or disagree that it was worthwhile for you to renegotiate a better deal with your existing retailer?   Code one only

Strongly agree	☐	1
Tend to agree	☐	2
Neither agree nor disagree	☐	3
Tend to disagree	☐	4
Strongly disagree	☐	5
Don't know	☐	97
Refused	☐	98

SECTION G: Aware non-switchers and non-renegotiators   Rep survey and MOSL

GR1 (ASK if aware AND not switched/not successfully renegotiated in the last 12 months (AR1=1 AND (DR1=2, 3 AND DR4=2, 3)) or (S4B/2 AND BM1=2, 3, 97, 98 AND BM4=2, 3, 97, 98))
Thinking about the last 12 months, which of the following scenarios best applies to your organisation?
Interviewer: Read out options. Respondents in the process of switching should be coded 1.   Code one only

You are currently in the process of switching or moving to a new deal **(Continue to H1-6, then H9)**	☐	1
You are considering switching providers or renegotiating with your existing provider AND have taken steps to search for and compare different providers **(Continue to H1-6, then H9)**	☐	2
You tried to switch or renegotiate but found you couldn't **(Continue to H1-6, then to H9)**	☐	3
You considered switching or renegotiating but decided not to **(Continue to H1-6, then to H8)**	☐	4
You have switched more than a year ago and are not currently considering switching or renegotiating **(Continue to H7)**	☐	5
You have not considered switching or renegotiating but plan to do so in the future **(Continue to H7 then H11)**	☐	6
You have not considered switching or renegotiating and have no plans to do so **(Continue to H7)**	☐	7
Don't know	☐	97
Refused	☐	98

SECTION H: Searching and Comparing **Representative survey and MOSL**

H1 (ASK if switched BM1=1, 2 or S4B=1 OR DR1=1, 2 OR F3=1, OR GR1=1, 2, 3, 4) **[Multi]**
Which of the following, if any, have you used to search for information about alternative retailers?
INTERVIEWER: Read out response options- apart from don't know or refused. Code all that apply.

The Open Water website	☐	1
A retailer's website	☐	2
A price comparison website	☐	3
Direct contact with another retailer	☐	4
A broker	☐	5
A consultant	☐	6
Other (please specify)	☐	7
I didn't search (none)	☐	8
Don't know	☐	97
Refused	☐	98

H2 (ASK if H1=4 [price comparison website]) **[Multi]**
Did you use a price comparison website which listed quotes from different retailers OR one where you put in details, such as water usage, for a tailored quote, or both?
INTERVIEWER: Read out response options if necessary. Code all that apply.

Listed quotes from different retailers	☐	1
Put in details for a tailored quote	☐	2
Other (please specify)	☐	3
Don't know	☐	97
Refused	☐	98

H3 (ASK if H1=1,2,3,4,5,6,7)
How easy or difficult was it for you to find the information you felt like you needed to make an informed choice?
INTERVIEWER: Read out response options- apart from don't know or refused. Code one only

Very easy	☐	1
Fairly easy	☐	2
Neither easy nor difficult	☐	3
Fairly difficult	☐	4
Very difficult	☐	5
Don't know	☐	97
Refused	☐	98

H4 (ASK if H3=4, 5) **[Multi]**
Why was this difficult
INTERVIEWER: Probe but do not prompt. Code all that apply

Didn't know where to look for information/where to go	☐	1
Don't know enough about the new market	☐	2
Not enough time	☐	3
Information not available via phone/online/my preferred communication method	☐	4
Information found wasn't relevant	☐	5
Information found wasn't clear/didn't understand information	☐	6
I don't know the price I'm paying now	☐	7
Other (specify)	☐	8
Don't know	☐	97
Refused	☐	98

H5 (ASK if H1=1,2,3,4,5,6,7)
How easy or difficult was it to compare different retailers?
INTERVIEWER: Read out response options- apart from don't know or refused.
Interviewer, if necessary: for example, in terms of price or services offered Code one only

Very easy	☐	1
Fairly easy	☐	2
Neither easy nor difficult	☐	3
Fairly difficult	☐	4
Very difficult	☐	5
Don't know	☐	97
Refused	☐	98

H6 (ASK if H5=4, 5) [Multi]
Why was this difficult?
INTERVIEWER: Probe but do not prompt. Code all that apply

Prices weren't clear/were hard to compare	☐	1
Information wasn't consistent	☐	2
Couldn't get enough quotes to compare/quotes weren't of sufficient quality	☐	3
Didn't know what to compare (lack of familiarity with the market)	☐	4
Not enough time	☐	5
Retailer failed to respond to query	☐	6
Retailers not interested in me as a customer	☐	7
Information not available via phone/online/my preferred communication method	☐	8
Other	☐	9
Don't know	☐	97
Refused	☐	98

H7 (ASK if GR1 =5, 6, 7 [plan to in future or have not considered]) [Multi]
Why have you not yet considered switching retailer or renegotiating with you existing retailer in the last 12 months?
INTERVIEWER: Probe but do not prompt. Code all that apply

Switched or renegotiated before (over 12 months ago) and locked into contract since	☐	1
Switched or renegotiated before (over 12 months ago) so haven't considered it since	☐	2
Service is good/happy with current retailer/provision	☐	3
Don't know any other retailers/no alternative	☐	4
Don't know how to switch	☐	5
Too much effort to switch	☐	6
No point in switching	☐	7
Prefer a local company	☐	8
Better the devil you know	☐	9
Bad experiences switching other utilities (e.g. gas, electric, telephone)	☐	10
No retailer is offering what I want/what I am looking for	☐	11
Worried about being worse off after switching/being taken advantage of	☐	12
Intend to in the future, but haven't got round to it	☐	13
Considered previously but decided against it	☐	14
Other (please specify)	☐	95
Don't know	☐	97
Refused	☐	98

H8 (ASK if GR1=4 [Considered but decided not to]) [Multi]
In the last 12 months, why did you decide not to switch retailers or renegotiate with your existing retailer after considering it?
INTERVIEWER: Probe but do not prompt. Code all that apply

Savings were minimal/didn't save enough money	☐	1
No way to compare services/prices	☐	2
No other benefits to be gained from switching	☐	3
Service is good/happy with current retailer	☐	4
Don't know any other retailers/no alternative	☐	5
Too much effort to switch	☐	6
Prefer a local company	☐	7
Better the devil you know	☐	8
Bad experiences switching other utilities (e.g. gas, electric, telephone)	☐	9
No retailer is offering what I want/what I am looking for	☐	10
Worried about being worse off after switching/being taken advantage of	☐	11
Had switched before and didn't want to again so soon	☐	12
Other (please specify)	☐	13
Don't know	☐	97
Refused	☐	98

H9 (ASK if GR1= 1, 2, 3, 4) [Multi]

In the last 12 months why did you start looking into switching or renegotiating?

Probe and code all that apply

Lower price/bill	☐	1
Higher quality service (e.g. more tailored billing)		2
Better customer service (eg. when I contact them)	☐	3
Bill consolidation for water and waste water	☐	4
[if S6=1:] Bill consolidation across multiple premises	☐	5
Bill consolidation across utilities		6
Incentives/cashback	☐	7
Online account management services		8
Water efficiency services	☐	9
Leakage control services	☐	10
Enhanced metering services	☐	11
Other (please specify)	☐	12
Don't know	☐	97
Refused	☐	98

H10 (ASK if GR1=3 [tried to switch or renegotiate and couldn't])

Why was it you couldn't switch or successfully renegotiate in the last 12 months?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

H11 (ASK all aware of possibility to switch or renegotiate water AR1=1, MOSL) **[Multi]**

Since the water market was opened to competition in April 2017, have you noticed any positive or negative changes in the water retail services you receive? code one only

Yes – positive changes	☐	1
Yes – negative changes	☐	2
No – no changes	☐	3
Don't know	☐	97
Refused	☐	98

H12 (Ask if H11=1)

What are the positive changes?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

H13 (Ask if H11=2)

What are the negative changes?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

H14 (ASK ALL)

In percentage terms, what level of annual water bill reduction would encourage you to switch or consider switching retailer?

(Do not read out) Would not switch retailer due to water bill reduction	☐	1
(Do not read out) Would not switch at all	☐	2
Write in %	☐	90
Don't know	☐	97
Refused	☐	98

H15 (ASK if not aware (AR1=2) or if not considered/currently considering switching or renegotiating GR1=6, 7**)**

Is there anything else which would encourage you to switch or consider switching retailer or renegotiate or consider renegotiating with you existing retailer? If so, what?

No, nothing	☐	1
Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

SECTION I: Satisfaction with contact Representative (non-switchers and those that have only renegotiated)

IR1 (ASK if not switched in the last 12 months – DR1=2, 3, 97, 98)

Have you contacted your water and waste water retailer in the last 12 months?

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

IR2 (ASK if contacted IR=1) [Multi]

What was the <u>most recent</u> contact you had with them about?

Interviewer: Do not read out Probe and code one only

Billing enquiry	☐	1
To report a leak	☐	2
Sewerage problem	☐	3
Loss of supply after icy weather	☐	4
Issue with water meter	☐	5
Issue with meter reading	☐	6
No supply / supply issue	☐	7
Water quality	☐	8
Water pressure	☐	9
To make a complaint	☐	10
To change to/ask for a water meter	☐	11
To find out about switching	☐	12
To ask about other services such as trade effluent permits/ developer services	☐	13
Don't know	☐	97
Refused	☐	98

IR3 (ASK if contacted IR1=1)
Were they able to resolve your enquiry, or did they redirect you to another organisation? Probe as necessary and code one only

They resolved it directly	☐	1
Redirected to some other organisation who resolved it	☐	2
Enquiry redirected and remains unresolved	☐	3
Enquiry not redirected and remains unresolved	☐	4
Don't know if enquiry was redirected but remains unresolved	☐	5
Don't know	☐	97
Refused	☐	98

IR4 (ASK if contacted IR1=1)
How satisfied or dissatisfied were you with the contact with your water and waste water retailer overall? Code one only

Very satisfied	☐	1
Fairly satisfied	☐	2
Neither satisfied nor dissatisfied	☐	3
Fairly dissatisfied	☐	4
Very dissatisfied	☐	5
Don't know / can't recall	☐	97
Refused	☐	98

IR5 (ASK if IR4=4, 5)
Why were you dissatisfied?

Freetext (record word for word)	☐	90
Don't know	☐	97
Refused	☐	98

SECTION J: Summing up — All respondents

J1 (ASK ALL) [Multi]
Overall, and taking everything into account, what is important to you as a water customer?
INTERVIEWER: DO NOT READ OUT. Code all that apply

Reliable water supply/no interruptions in supply	☐	1
Price	☐	2
Online account management services	☐	3
Quality of <u>customer</u> service	☐	4
Quality of <u>billing</u> services	☐	5
Quality or accuracy of meter reading / enhanced metering services	☐	6
Consolidating water and sewerage services to the same retailer	☐	7
[if S6=1:] Consolidating multiple premises to the same retailer	☐	8
Consolidating different utilities (including water) to the same supplier	☐	9
Water efficiency	☐	10
Leakage control	☐	11
Reputation of the retailer	☐	12
Other (specify)	☐	13
Nothing in particular	☐	14
Don't know	☐	97

Refused	☐	98

J2 (ASK ALL)

Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole? Code one only

Very satisfied	☐	1
Fairly satisfied	☐	2
Neither satisfied nor dissatisfied	☐	3
Fairly dissatisfied	☐	4
Very dissatisfied	☐	5
Don't know	☐	97
Refused	☐	98

SECTION K: ORGANISATION DEMOGRAPHICS All Respondents

I would now just like to ask some questions about your water usage…

K1 (ASK All)

Are you on a metered supply?

Interviewer, if necessary: this means that what you pay is based on the amount of water you use, rather than a fixed amount.

Yes	☐	1
No	☐	2
Don't know	☐	97
Refused	☐	98

K2 (ASK if number of premises S6=1)

To what extent are your other premises on a metered supply?

Interviewer, if necessary: this means that what you pay is based on the amount of water you use, rather than a fixed amount. Code one only

All premises	☐	1
Some premises	☐	2
No – none	☐	3
Don't know	☐	97
Refused	☐	98

K3 (ASK if not switched or renegotiated DR1= 3, 97, 98 and DR4= 3, 97, 98 or S4B/2 and BM4=3, 4)

Can you tell me approximately how much your organisation pays for your water and waste water services per year, [if S6=1: across all premises]?

Interviewer: Record figure if this is given spontaneously, otherwise prompt with bands

Freetext (Record exact value)	☐	90
Less than £500	☐	1
£500 up to £999	☐	2
£1,000 up to £1,999	☐	3
£2,000 up to £9,999	☐	4
£10,000 up to £100,000	☐	5
More than £100,000	☐	6
Don't know	☐	97
Refused	☐	98

K4 (ASK ALL)
Approximately what proportion of your organisation's annual running costs go on water and waste water bills?
Interviewer: Prompt for clarification only.

0-5%	☐	1
6-10%	☐	2
11%+	☐	3
Don't know	☐	97
Refused	☐	98

K5 (ASK ALL)
Has your organisation switched provider for…..
i …gas or electricity services…
i …telephone or internet provider…?
INTERVIEWER: Read out response options- apart from don't know or refused and code one only for each

	i gas/electric		ii tel/internet	
[S4A=2, 3, 4: …In the last 12 months] [S4A=1: yes]	☐	1	☐	1
[S4A=2, 3, 4:…Longer ago]	☐	2	☐	2
[ALL: No]	☐	3	☐	3
Don't know	☐	97	☐	97
Refused	☐	98	☐	98

K6 (ASK ALL)
Ofwat and CCwater will be conducting further research about the water market in the next 18 months or so, and they would really value your input. Would you be happy to be re-contacted in the next 18 months to conduct further research? This contact would be by BMG or another independent research contractor working on behalf of Ofwat and CCwater. If you agree there would be no obligation on you at any stage?

Yes – capture name/number AND EMAIL ADDRESS: Please may I also take down your email address? DOUBLE INPUT	☐	1
No	☐	2
Refused	☐	98

K7 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 you very much for your help and time completing this interview.
To repeat: Ofwat have employed BMG Research to conduct this survey. We are a member of the Market Research Society and are registered under the Data Protection Act, and if you have any queries regarding the survey or our company, I can supply you with contact names and numbers.
INTERVIEWER: PROVIDE AS NECESSARY
BMG TEAM CONTACT DETAILS: 0121 333 6006 or helpline@bmgresearch.co.uk or emma.osborne@bmgresearch.co.uk

MRS Freephone Number - 0800 975 9596