The voice for water consumers
Llais defnyddwyr dŵr

Testing the Waters 2020/21:
Experience of business customers during Covid-19

July 2021

Alex McCluckie, Research Director
amccluckie@djsresearch.com

Matt Prince, Senior Research Manager
mprince@djsresearch.com

Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

+44 (0)1663 767 857
djsresearch.co.uk

JN7195

Contents

Foreword

Every two years we closely examine the views of business customers on the water, sewerage and retail services they receive from their suppliers. Last year our survey coincided with the start of the Covid-19 pandemic which affected businesses in different ways. Some were forced to temporarily close while others had to scale back their activities to meet the requirements of social distancing.

The timing of the survey gave us an invaluable insight into how businesses across England and Wales were affected by the pandemic, and what their views of their services were during this time.

Overall, we found that most businesses were affected in some way by the pandemic. More than 30% were so severely impacted that they were having to review future plans for their business. It's disappointing then that less than a quarter of businesses could recall receiving information from their water retailer about the help and support that was available to them throughout Covid-19. Those that did receive information welcomed it. We also found that proactive communication on relevant help and support was linked to a more positive view of their retailer. These customers were also more likely to show loyalty to their retailer and look to renegotiate terms with them rather than consider switching supplier.

The report also highlights some other interesting findings. Most business customers are satisfied with their water and sewerage services, but less so with their retail services. Poor service and bill accuracy were cited as the main reasons for dissatisfaction.

Expectations on bill savings in the retail market in England have fallen over the last few years. More businesses are also saying they would not switch to save money, but only for better service.

A large number of business customers did not recall being offered any support or information during Covid-19. In light of this, we want companies and retailers to reflect on our findings and be more proactive in reaching out to their customers. They should also strive to provide improved services, support and assistance.

Lockdown may be easing but many businesses still face a long and uncertain road to recovery. That journey can be made easier by companies and retailers and in return they may be rewarded with greater loyalty and satisfaction from their customers.

Dr Mike Keil,
CCW's Director of Policy, Research and Campaigns

2. Executive Summary

Executive summary: background

In April 2017, the non-household (NHH) water retail[1] market in England was opened to all directly billed businesses, charities and public sector organisations regardless of how much water they used.

Since then, they have been able to choose who provides their retail services. In Wales, only business customers who use 50 megalitres a year are eligible to access the market by choosing which company provides their retail services.

Every two years, CCW commissions 'Testing the Waters'; a satisfaction survey of business customers in England and Wales.

The onset of the Covid-19 pandemic – which coincided with the timings for the 2020 iteration of Testing the Waters – necessitated a change in approach to the project, including the addition of a qualitative element.

This report details findings from 1,000 Computer Assisted Telephone Surveys (CATI) and 20 in-depth telephone interviews with a cross-section of businesses in England and Wales.

The CATI interviews focused on various elements of business customers' satisfaction with retail and wholesale[2] water supply and services, and in-depth telephone interviews focused on customer experience during Covid-19.

1 Retail services cover customer service, billing and meter readings.
2 Wholesale services cover water and sewerage supply to and from the business premises.

Executive summary: key findings (1)

Key findings from the 2020/21 Testing the Waters project:

- Just under a third (31%) of businesses say they have been severely impacted by Covid-19, almost half (48%) report a moderate effect, and a fifth (20%) only a minimal impact[3].
  - Businesses that said they had been severely impacted by Covid-19 were more likely to have been contacted by their retail services provider than those who experienced a moderate or minimal impact;
  - Despite this, businesses that had been severely impacted were less likely to: trust their water retailer, feel they received value for money, be satisfied with their retail services provider or recommend them.
  - Just over a fifth (22%) of businesses reported being proactively contacted by their retail services provider during Covid-19 to offer help or support;
  - Those who were severely impacted by Covid-19 measures were more likely to recall being contacted by their retail services provider than those where there was only a minimal impact (25% cf. 12%);
  - Businesses who recall having received contact from their retailer are both more likely to think their provider cares than those who don't recall any offer of support (57% cf. 49%), and more likely to renegotiate a better price or contract (47% cf. 33%).

- From the qualitative portion of the research we found that water companies were generally thought to be behind banks and other financial services providers in the support offered, but in line with other utilities providers. Where support was received, it was most often instigated by email, meaning few felt that retailers had gone 'above and beyond'.
- Less than one in ten contacted their water service provider and/or their sewerage service provider (wholesaler) in the last 12 months (7% and 3% respectively), however just over a fifth (21%) contacted their retail services provider:
  - 30% contacted about a billing enquiry, suggesting that a level of confusion between wholesale and retail persists.
  - Customers suggest that in the main they do not particularly want their retailer to contact them more frequently, but they would like them to be more contactable when the need arises.
- Over half of customers agree their water services provider and/or their retail service provider cares about the service it provides (53% and 51% respectively).
- Almost eight in 10 (78%) agree that their water bills are clear and easy to understand.

3 Severe impact = Covid-19 has had a severe impact on our business and we're having to reevaluate our plans for the future; moderate effect = Covid-19 has had an impact on our business but we are continuing to plan as normal for the future; minimal impact = Covid-19 has had a minimal impact on our business

Executive summary: key findings (2)

- 69% of customers reported being satisfied with their retail services (significantly lower than satisfaction with water and sewerage provision – 91% and 88% respectively):
    - Customers in Wales were significantly more likely to be satisfied with their retail services than customers in England (85% cf. 68%).

- Just over nine in 10 (91%) reported being satisfied with their water service provision, and a similar proportion (88%) satisfied with their sewerage service provision.

- Two in five (40%) were promoters[4] of their water service provider, and 29% detractors, resulting in a Net Promoter Score of +11.
    - Customers in Wales were significantly more likely to be promoters than customers in England (60% cf. 39%).

- Just under a third (30%) were promoters of their retail service provider (significantly lower than the 40% who are promoters of their water service provider), and 37% detractors, resulting in a Net Promoter Score of -7.
    - Again, customers in Wales were significantly more likely to be promoters than customers in England (54% cf. 29%).

- Just over half (54%) of customers in England were aware they can switch or renegotiate their service/price. Of those who were aware, 23% had switched and 51% had taken no action:

    - Of those who switched, 58% were satisfied with the process, but 22% were dissatisfied.

    - Customers who have high demand for water and other utilities were often aware they can switch or renegotiate but frustrated that their TPI/broker - who they use for gas and electric contracts – didn't offer the same for water services.

- Just over a fifth (21%) anticipated switching retail provider in the next 6 months, but almost two-fifths (37%) were likely to try and negotiate a better contract or price with their retailer:
    - Qualitatively, a number of customers were put off looking to switch due to lack of recognition/awareness of the retailers in the market.

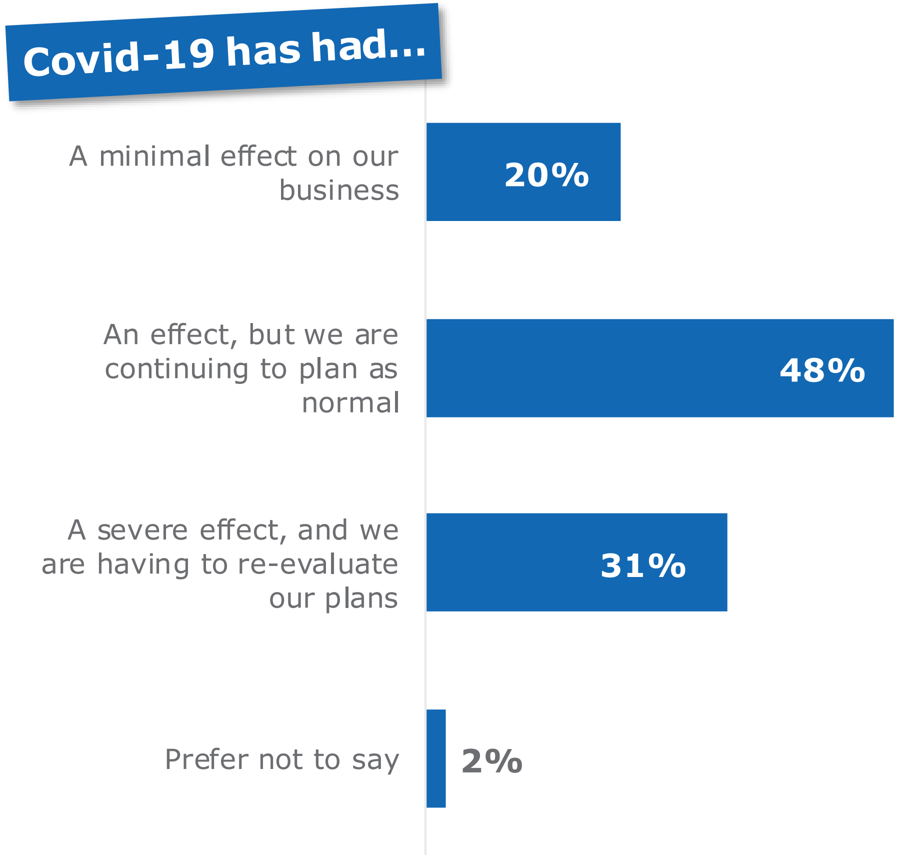
- Over a quarter (27%) who were aware of the ability to switch or renegotiate said they would switch for a saving of 0-5%, a significant increase from when the survey first began – suggesting that customers are beginning to become more realistic in the savings they can expect. However, the proportion of customers who would only switch due to service reasons has also increased.

4 Customers providing a rating of 9 or 10 out of 10 to the question of how likely they would be to recommend their water or retail provider are classed as promoters. Customers providing a rating of 7-8 are classed as neutral, and customers providing a rating of 0-6 are classed as detractors.

3. The impact of Covid-19 on business

The impact of Covid-19 on business planning

Covid-19 had a minimal impact on just a fifth (20%) of businesses, a moderate effect (where businesses were impacted but continued to plan as normal) on just under half (48%), and a severe impact on just under a third (31%).



- Over half (53%) of businesses in arts, entertainment and recreation say that Covid-19 has had a severe effect on their business and they were having to re-evaluate their plans for the future.
- 47% whose water bills amount to more than 5% of running costs say that Covid-19 has had a severe effect on their business and that they are having to re-evaluate their future plans as a result (16% higher than the overall).
- Size of business isn't a strong determiner of the impact of Covid-19, with no significant difference between small, medium and large businesses.
- There are no significant differences between customers in England and Wales.

Base: all respondents (1,000). Q40: Which of the following statements best reflects your organisation's future outlook with regards to Covid-19?

Note: as per the qualitative findings (see page 10), we would have expected hospitality to report severe effects of Covid-19 over and above the overall. The quantitative data did not show this – possibly due to the self-selecting nature of the sample achieved (a significant proportion of hospitality businesses were closed throughout much of 2020 so wouldn't have been reachable)

Concerns and changes arising from Covid-19

Despite varying degrees of impact during Covid-19, almost all businesses had to adjust the way in which they worked.

Minimal impact

Businesses in agriculture and transport / logistics tended to experience a lesser impact from Covid-19 overall.

Concerns largely around continuity of supply chains.

Changes focused on procedures to avoid close contact where possible.

Moderate impact

Businesses in real estate, manufacturing and professional services tended to experience a moderate impact from Covid-19.

Concerns around staff support and welfare (including furlough for some).

Changes focused on a shift to working from home and reducing overheads where possible.

Severe impact

Businesses in arts, entertainment and recreation, and accommodation and food services tended to experience a more severe impact from Covid-19.

Concerns focused on ability to pay staff and bills, and long-term viability.

Changes focused on adapting to forced closure / reduced occupancy, reducing overheads and accessing support from government, council, landlords and suppliers.

Action taken by business during Covid-19

Businesses severely impacted by Covid-19 were more likely to have taken significant action than those who were minimally or moderately impacted.

Minimal impact

Mostly operated on a business as usual basis, only looking at the potential for support when proactively contacted.

Moderate impact

Generally **focused on accessing furlough** support (where applicable / necessary)**, and trying to negotiate with landlords** on rents and rates during enforced office closures.

Severe impact

Looked for support from a variety of sources, including furlough, landlords, suppliers and customers. Generally **operated on a checklist basis, working from the biggest expenses / overheads to the lowest**.

"We furloughed some people and we had a chat with our landlord about a short-term reduction, but that was about it… we never really stopped, [taking action to reduce overheads] was not a priority"

Support services, North (moderate impact)

"We had to look at all of our costs – absolutely everything – and then we spent 3 weeks working through a list contacting everyone we could to try and negotiate payment holidays, rate reductions and payment extensions."

Hospitality, Midlands (severe impact)

General support during Covid-19

Businesses don't recall much in the way of proactive contact from outside agencies during Covid-19. For businesses that needed more extensive support there were some organisations that were more likely to offer proactive support and some that were less likely.

More likely to offer proactive support

- Customers
- Banks
- Telecoms and utilities providers

Less likely to offer proactive support

- Landlords
- Suppliers

In the main, **where proactive support was received** from banks, telecoms and utilities providers, **it tended to be in the form of an email or letter**, directing the business to online information about the support on offer to businesses.

A **number of businesses felt they didn't need the support**, but for **those that did**, most **found** that **the support on offer** was **focused on payment holidays** and **advice on how to reduce bills / outgoings**.

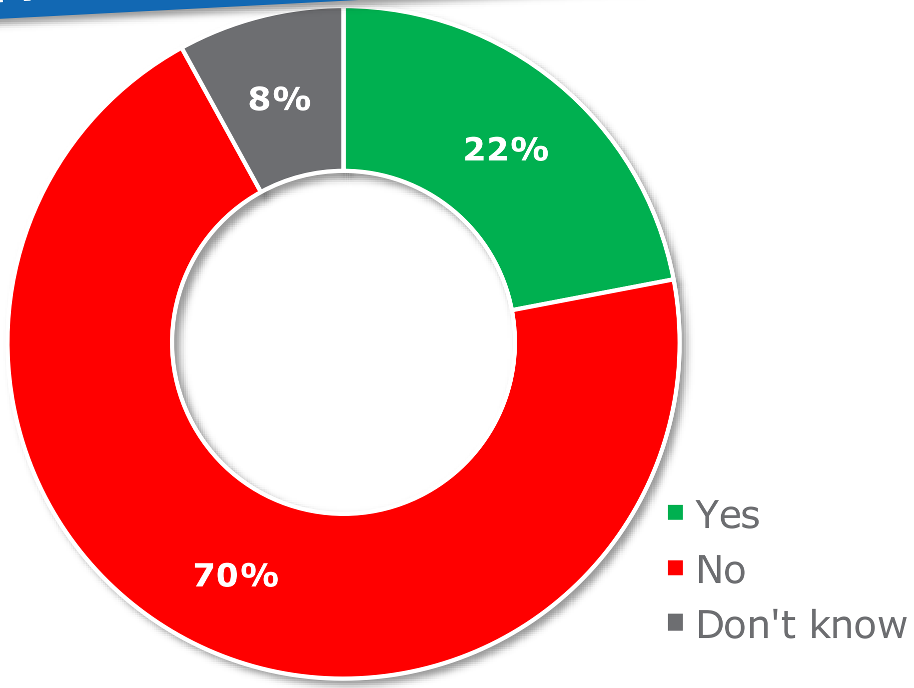
Water companies were generally **thought to be behind banks** and other financial services providers **in the support offered**, **but in line with other utilities providers**. **Where support was received**, **it was most often** instigated by **email**, **meaning few felt** that **retailers had gone 'above and beyond'**.

4. The response to Covid-19 from retailers (and water companies in Wales)

Retailers (and water companies in Wales): contact & support during Covid-19

Just over a fifth (22%) recall being contacted by their retailer offering support or information relating to billing arrangements*.

Contacted by water company offering support or information during Covid-19?



Customers who say Covid-19 had a severe impact on their business are **more likely to recall having been contacted than those who say it had a minimal impact** (25% cf. 12%) – suggesting that businesses most in need of support were more likely to recall having received it, and/or that water companies were targeting sectors they felt were most likely to be affected.

Customers in England are **more likely to recall having been contacted** than **customers in Wales** (22% cf. 16%).

*Qualitatively, the **contact and support** / information from water companies **appears to have largely been email correspondence early in the pandemic** (April / May 2020) giving details of where to go / what to do if they needed to access support.

Base: all respondents (1,000). Q37: Since the UK went into lockdown on 23rd March 2020, has your water retailer contacted you to offer any support or information, relating to billing arrangements?

Retailers (and water companies in Wales): response to Covid-19

Few customers remember receiving proactive contact from their water company during Covid-19, but among the few that do, it was most often an email and/or leaflet giving basic information.

Initial response

Customers are **more likely to remember contact in the early stages of the pandemic** than any other time.

More **severely impacted businesses were more likely to recall receiving emails about the support on offer**, and 'banked it' for future reference.

Ongoing response

Very **little awareness of continued** proactive contact and **support after April/May 2020**.

The **majority of businesses who transitioned to working from home are metered**, so found their bills reduced anyway.

Additional response

Some customers have **found contacting their water company more difficult during Covid-19**, with phones ringing out and emails being unanswered.

"I've sent them [water company] a number of emails and I've not had anything back – apart from an email to say that they're experiencing a high volume of contacts and they will get back to me in 10 days… it's been two months!"

Hospitality, Midlands

Customer confusion about water retailers and wholesalers

There continues to be confusion between water retailers and wholesalers, which can make accessing the help and support more difficult.

A number of customers **–** especially those where water is not critical to the day to day operation of the business – **are not** entirely **clear on the distinction between retailers and wholesalers.**

Some customers (mainly small and micro businesses) **continue to be unaware that they have a water retail provider** and a wholesale provider**, and would** automatically **revert to contacting their wholesaler** – as they would do for a domestic contact – **should the need arise. For others, there is** an **awareness** that **they have a retailer;** usually as a result of bills**; but they lack clarity on** the **roles and responsibilities** of each party**.**

Some reported a lack of clear direction from their wholesaler about who to contact – suggesting some businesses could have missed out on support.

Small and micro businesses

More likely to assume that **business bills** are **handled** in **the same** way **as household bills**.

Medium businesses

More likely to be aware of the retailer / wholesaler split, but not always aware where responsibilities lie.

Large businesses

Largely aware of the difference between retail and wholesale, and to understand roles and responsibilities.

Customer confusion about water retailers and wholesalers

Just under three-quarters (72%) of customers are aware of their water wholesaler, but just under half (48%) are aware of their water retailer.

72%
Correctly identify their water wholesaler*

- 6% don't know
- 7% provide an 'other' response, 6% of which identify a retailer

48%
Correctly identify their retailer**

- 11% don't know
- 18% identify their wholesaler

Customers are **more likely to be aware of their wholesaler than** their **retailer**, and a **significant minority in England think they have the same provider** for wholesale and retail services.

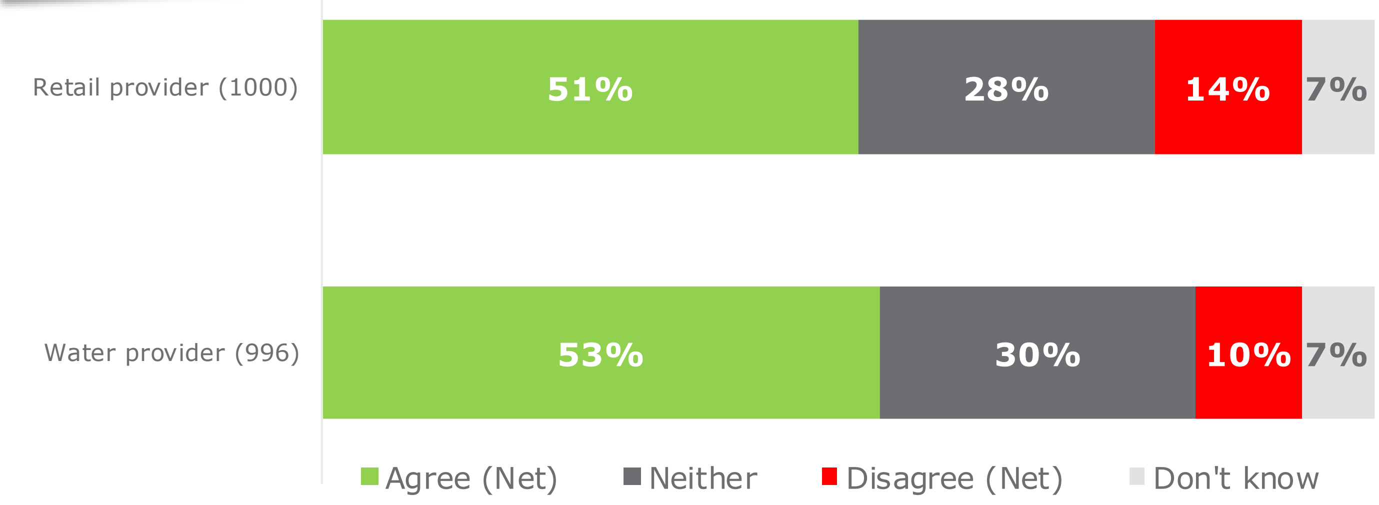
*All customers (England and Wales)
**Customers in England only

Base: Q1: all respondents (1,000): Q18: all respondents in England (795). **Q1:** Which company provides water services? (i.e. supplies clean water to the site you usually work at). **Q18:** Which retail water company bills your business for water and sewerage services, provides customer services and reads any water meters at this site?

Caring for customers

Just over half (51%) agree their water retail provider cares about the service it gives to business customers – a similar figure to those who agree their water provider cares (53%).

Extent to which providers care for customers...



The **proportion** of customers **who agree their retailer cares** about the services it gives to business customers **has improved significantly since 2018** (51% in 2020 up from 45% in 2018). There is **no significant difference in perceptions of water provider care** (53% in 2020 cf. 51% in 2018).

Businesses who recall having **received contact / support** from their retailer are **more likely to think** their **retail provider cares than those who don't** recall any support (57% cf. 49%).

Customers in Wales are **significantly more likely to agree** that **their water** and retail **providers care** about the service they give to customers* (69% and 74% respectively) **than customers in England** (52% water provider, 50% retail provider).

Base: as shown. Q11: How much do you agree or disagree that [your water service provider] cares about the service it gives to business customers?
Q26: How much do you agree or disagree that [your retail service provider] cares about the service it gives to business customers? Note: data labels <4% not shown.

*The majority of customers in Wales do not have a separate water retailer and wholesaler.

Caring for customers during Covid-19

The majority of businesses don't feel they have a close relationship with their water retail or wholesale provider, and this hasn't tended to change during Covid-19.

Although most customers **are** broadly **happy with** the **service** they receive, **for the majority it is** a **purely transactional** relationship, **with no significant sentiment** attached. As a result, **relatively few** customers **feel able to confidently say whether their providers care** about the service they offer, **or not**.

Aside from some businesses where the continuous supply of water is critical, **for most, water supply and billing is something that is taken for granted or just exists in the background** – **and** as such **is seen as a low priority overall**.

Where this is the case, **customers don't expect much in the way of ongoing care or support**, **but** they **do expect** that they will be able **to get in contact with their retailer quickly and efficiently when necessary**.

"There was a leak on the road outside the shop, so I called them. They came out pretty quickly to be fair to them… there was no 'how are you', or 'is there anything else we can do' though."

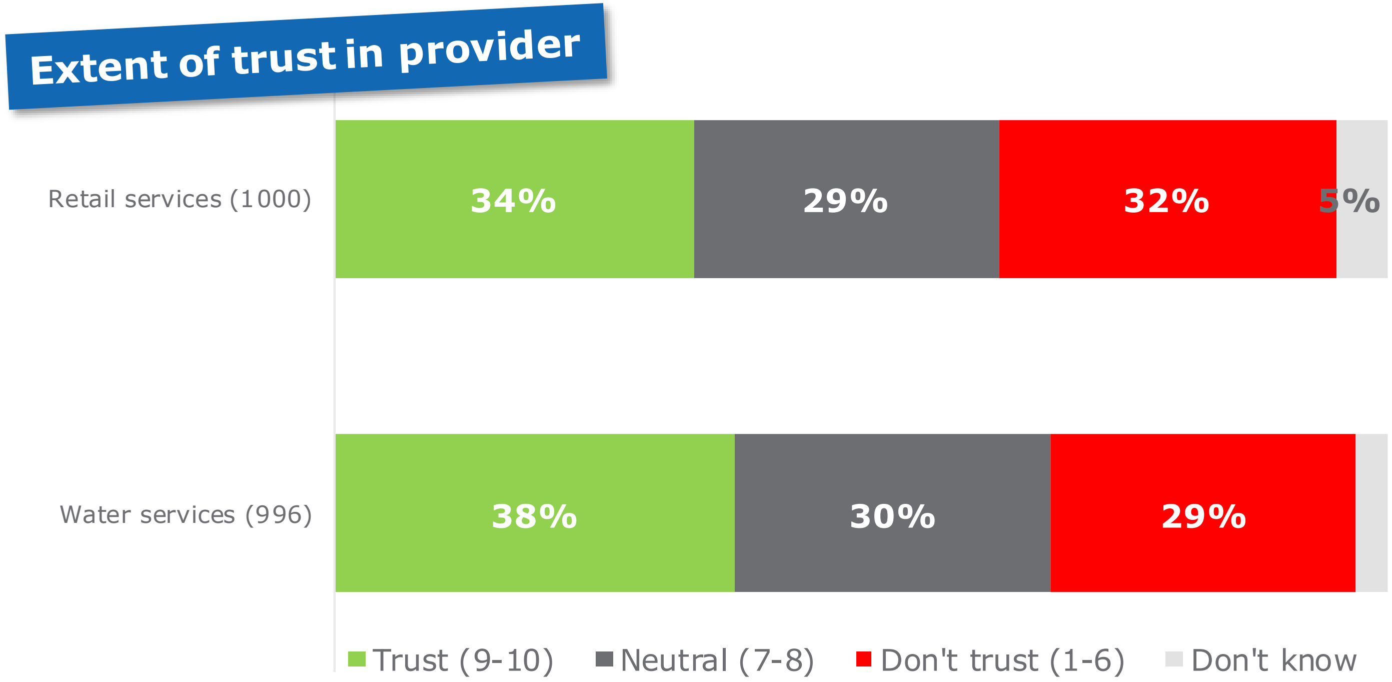
Retail services (local shop), North

"It's just water isn't it… we only use it for the toilets and cups of tea. It's low down on the list of priorities really… the bills aren't the difference between us surviving or not."

Professional services, Yorkshire

Level of trust in service providers

Roughly equal proportions of customers have high levels of trust in their provider, are neutral, and lack trust.



Just a quarter (25%) **of businesses severely impacted by Covid-19 trust their** water **retail** service **provider**.

Customers based **in Wales** are **more likely to trust** both **their water** services **provider and/or their retail** services **provider*** **than customers in England** (55% cf. 37% for water services, and 54% cf. 33% for retail services).

Note: of the 29% who rate trust in their water provider between 1-6, just 7% provide a rating of 1-4, and of the 32% who rate their retail provider between 1-6, just 11% provide a rating of 1-4.

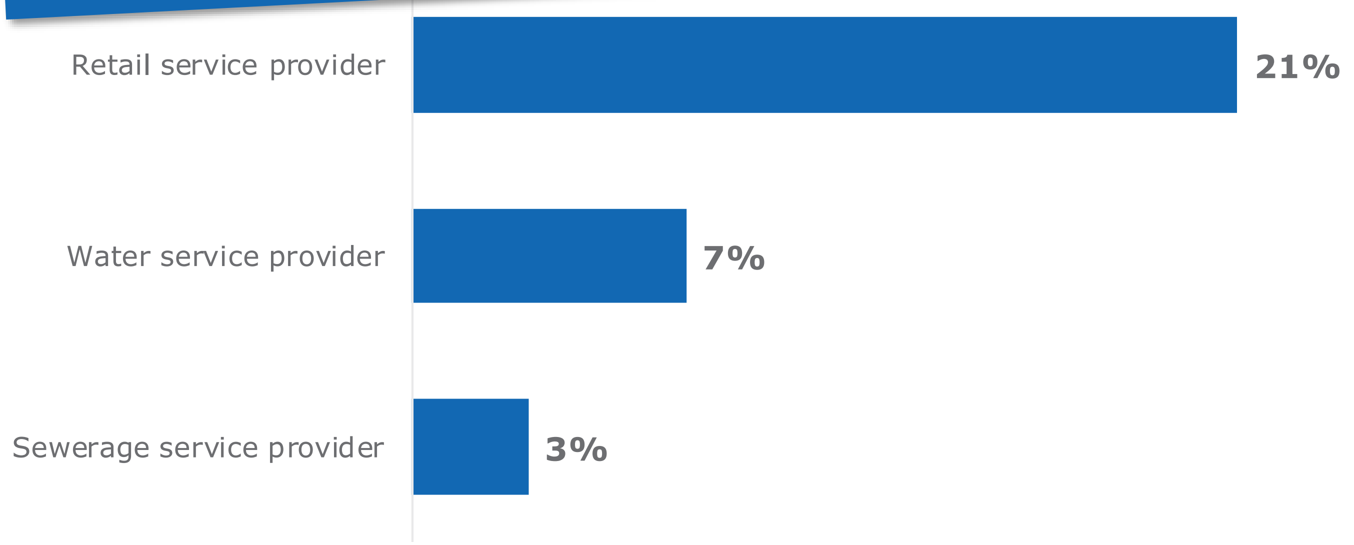
Base: as shown. Q13 & 30: How much do you trust your [water] / [retail] service provider? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all? Note: just 7% provide a rating of 1-4 for trust in their water services provider, and 11% provide a rating of 1-4 for their retail services provider – leaving around a fifth in each case who sit at the mid point on the scale.

*The majority of customers in Wales do not have a separate water retailer and wholesaler.

Customer contact during Covid-19

Just over a fifth (21%) have contacted their retail service provider in the last 12 months, and less than one in 10 have contacted their wholesale and/or sewerage service provider (7% and 3% respectively).

Provider contact (% yes, have contacted)



In 2018, **29% of customers contacted their retailer or water provider** (compared to 26% in 2020), **suggesting** that **Covid-19 didn't prompt a significant change in contact behaviour** among businesses. **However**, the **qualitative research did indicate** that **not all businesses felt they were well directed** to their retailer by the wholesaler.

Base: all respondents. Q32: In the past 12 months have you contacted any of the following with an enquiry or complaint? The 2018 question refereed to contact since 1st April 2017 – a period of 16 months.

Top reasons for contact: retail

General billing enquiry	**84%**
Issue with water meter	**12%**
To complain	**10%**

Top reasons for contact: water

To report a leak	**35%**
General billing enquiry	**30%**

Top reasons for contact: sewerage

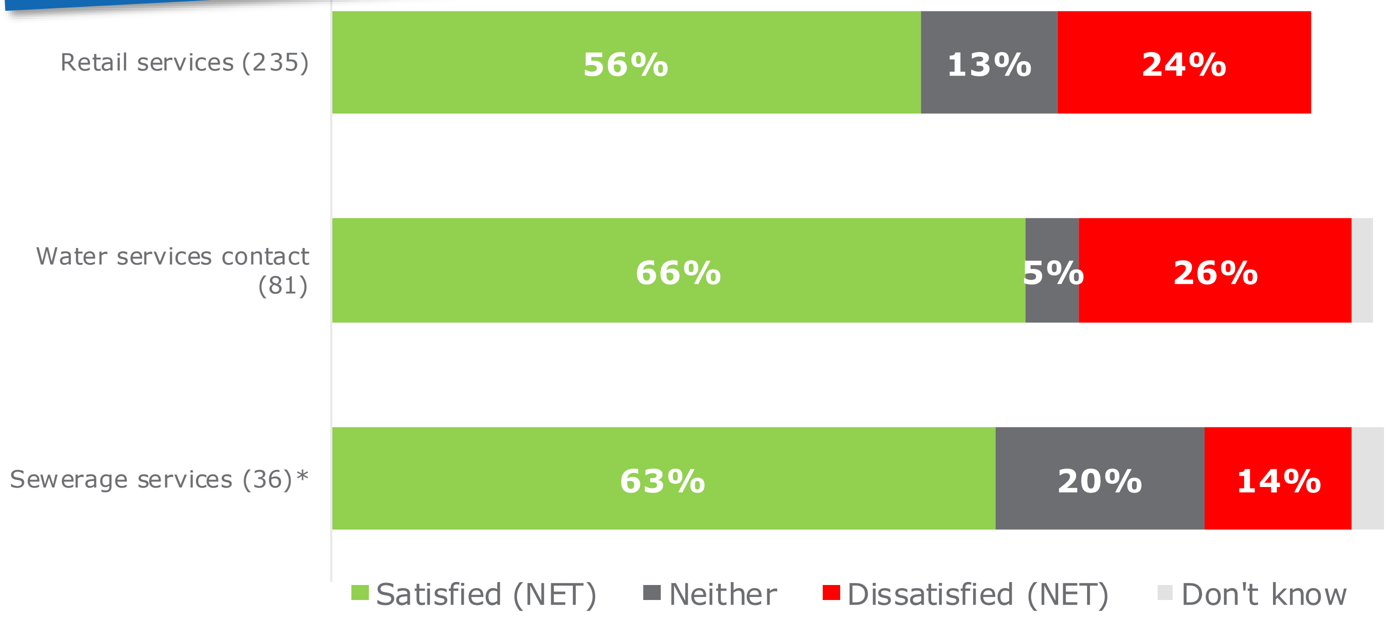
Sewerage problem	**51%**
General billing enquiry	**21%**
To report a leak	**12%**

QUANTITATIVE RESEARCH

Satisfaction with contact

Just over half (56%) are satisfied with the contact they had with their retailer, two-thirds (66%) of customers are satisfied with the contact they had with their water services provider, and just over six in 10 (66%) are satisfied with their sewerage service contact(s).

Satisfaction with...



Customers who were **minimally impacted by Covid-19** were **more likely to be satisfied with** their **retail services contact than those** who were **severely impacted** (63% cf. 53%).

Customers based **in Wales** are **more likely to be satisfied with** their **retail services contact than customers in England** (63% cf. 55%).

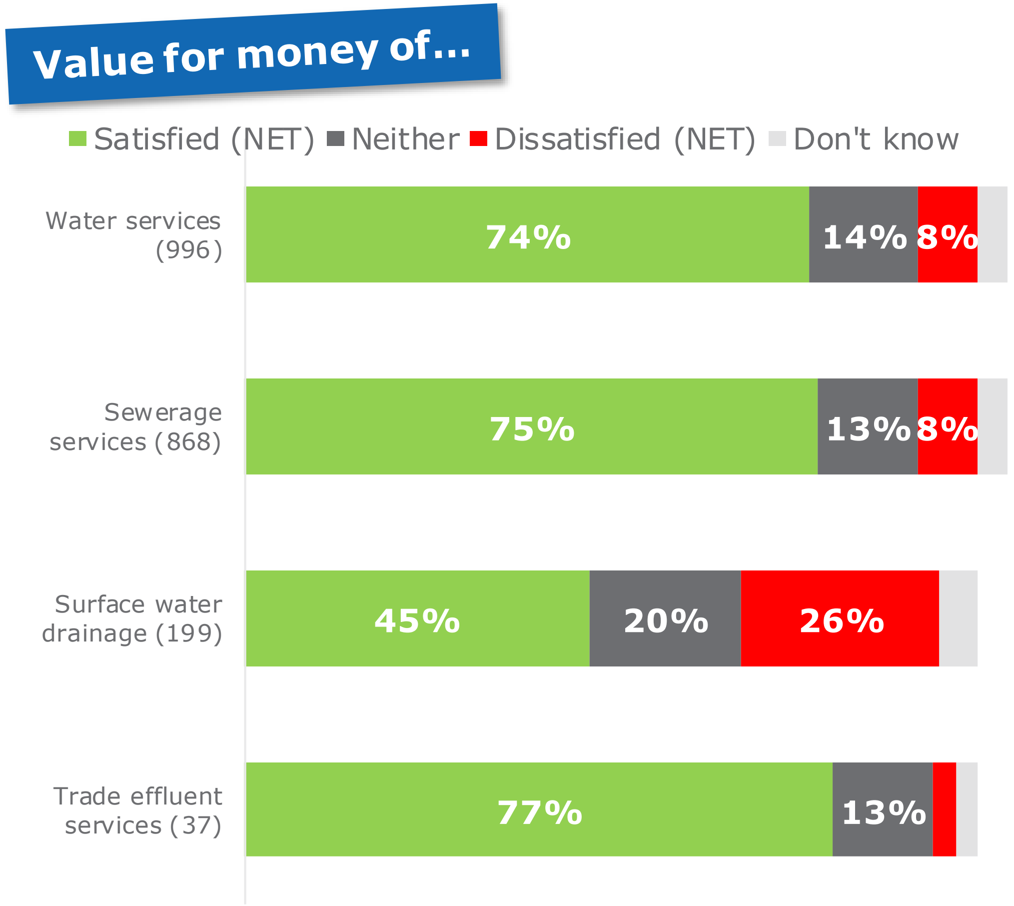
Note: there are no significant differences in satisfaction across the different types of service provision

Base: as shown. Q35: Overall, how satisfied or dissatisfied were you with the contact with... Note: data labels <4% not shown. *caution low base size (<50).

Significantly higher/lower than comparator

Perceptions of value for money

Around three-quarters report being satisfied with the value for money of the water and sewerage services supplied to their site.



- Those who say Covid-19 had a significant impact on their business are less satisfied with the value for money of their water service (67%) than those who say Covid-19 had a moderate impact (75%) and a minimal impact (81%):
  - The same difference between businesses and the impact of Covid-19 is observed in the perceived value for money of sewerage services.
- Businesses in Wales are more likely to be satisfied with the value for money of their water and sewerage services (81% and 84% respectively) than businesses in England (74% and 75% respectively).

There is no significant difference between perceived value for money of water and sewerage services in 2020 compared to 2018 (72% satisfied with water services and 72% satisfied with sewerage services in 2018).

Base: as shown. Q03: How satisfied or dissatisfied are you with the value for money of… Note: data labels <4% not shown.

Reasons for being dissatisfied with value for money

Among customers dissatisfied with the value for money of their water and/or sewerage service, the main reasons focus on the expense of bills and rising costs

Water (78)

Bills are generally too expensive	**49%**
Cost/prices have risen	**39%**
Poor customer service	**18%**
Inaccurate bills	**16%**

Sewerage (71)

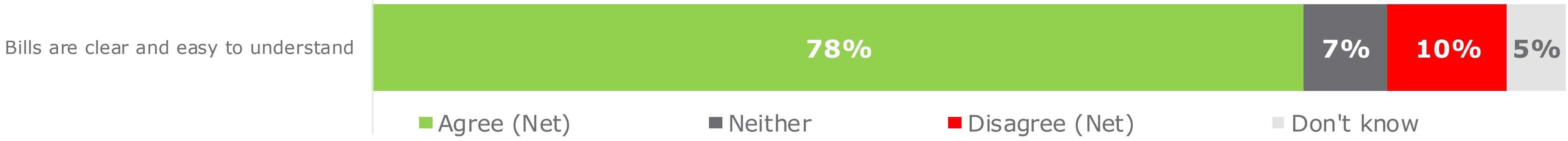
Bills are generally too expensive	**47%**
Cost/prices have risen	**28%**
Poor customer service	**19%**
Inaccurate bills	**10%**
Site area surface water drainage tariff unfair	**10%**

Base: as shown. Q04: Why do you think you don't get value for money for [WATER] / [SEWERAGE] services?

Clarity of bills

Over three-quarters (78%) agree that their bills are clear and easy to understand; however a significant minority (10%) disagree.

Bills are clear & easy to understand



There are **no significant differences in** the perceived **clarity of bills between those** who were **severely, moderately** and **minimally impacted by Covid-19** (78%, 78% and 80% respectively).

Customers in **Wales** (where in the majority of cases the retailer and wholesaler are the same) are **more likely to consider their bills clear & easy to understand than** customers in **England** (87% cf. 78%).

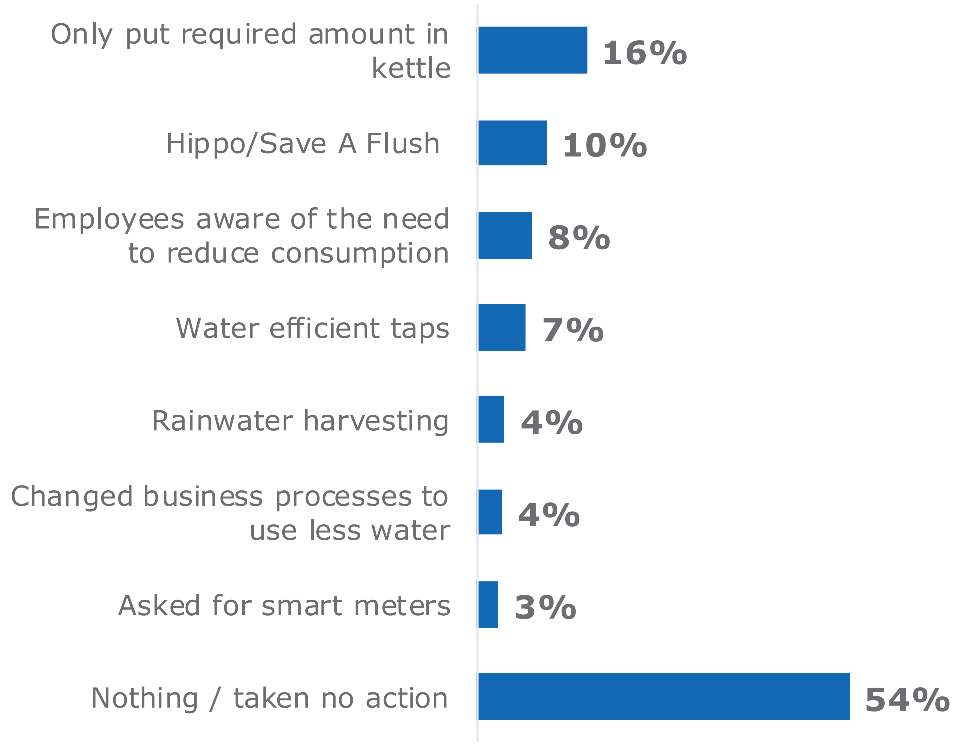
There is no significant difference between the perceived clarity of bills in 2020 compared to 2018 (81% clear*)

Base: all respondents. Q27: How much do you agree or disagree that your bills are clear and easy to understand?
*Note: the 2018 question asked how clear it was how much needed to be paid and when.

Water saving action

Just under half (46%) have taken some action to save water on site, with limiting the water in kettles to what's needed and installing Hippo/Save a Flush devices being the most common water saving actions.

Water saving action taken…



Customers in England are **more likely to have taken action than customers in Wales** (47% cf. 40%).

Across sectors**, those in construction** (69%) **and the hospitality industry** (63%) are **most likely to have taken no action**.

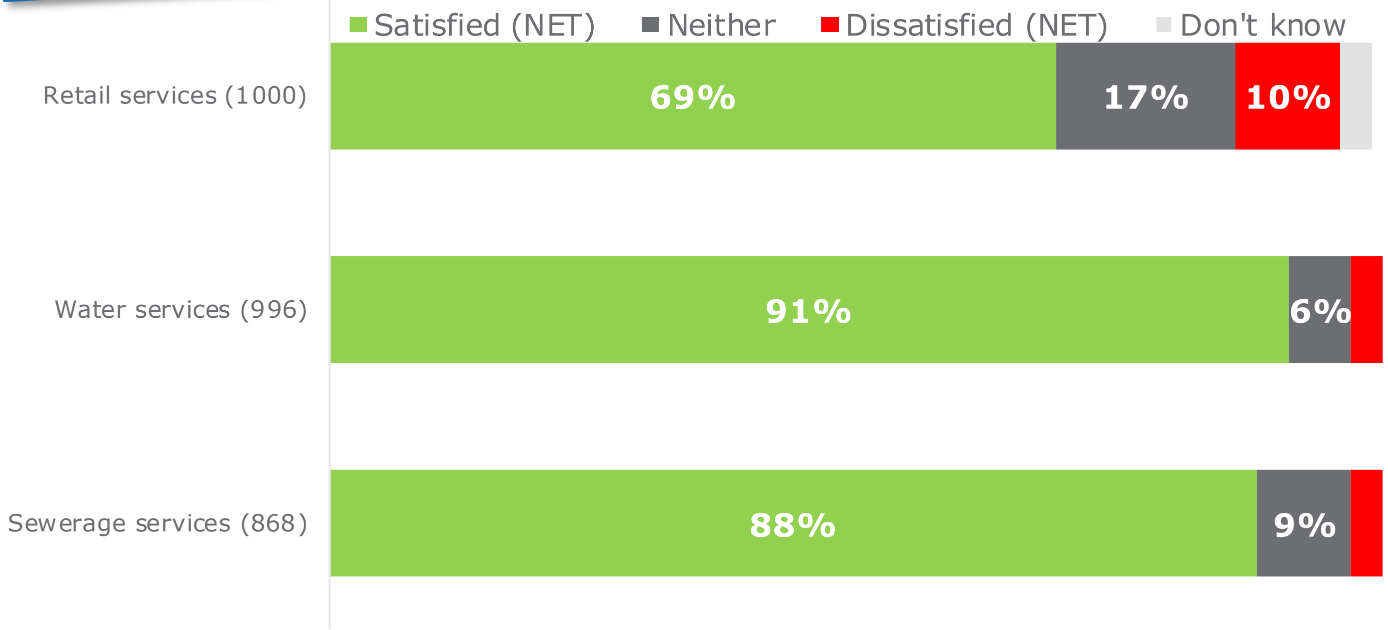
Smaller businesses less likely to have taken action than larger businesses (0-9 staff, 46% taken action; 10-49 staff, 45%; 50+ staff 55%)

Base: all respondents. Q07: What actions, if any, has your business taken to reduce its use of water at this site?

Service satisfaction during Covid-19

Just under seven in 10 are satisfied with their retail services, over nine in 10 (91%) customers are satisfied with their water services, and over eight in 10 (88%) are satisfied with their sewerage services.

Satisfaction with…



Satisfaction with water services has increased significantly since 2018 (91% up from 87%). Satisfaction with sewerage and retail services has remained stable.

Businesses who have been **severely impacted by Covid-19** are **less likely to be satisfied with** their **retail services than those** who were **moderately or minimally impacted** (63% cf. 70% and 76% respectively).

Customers who **have contacted their retail provider** are **significantly less likely to be satisfied than those who haven't** (49% cf. 75%).

Customers based **in Wales** are **significantly more satisfied with** their **retail services than customers** based **in England** (85% cf. 68%).

Base: as shown. Q05: Thinking now about water supplied to this site for offices, toilets, or business processes, overall, how satisfied or dissatisfied are you with the water supply for this site?/ Q08: Thinking now about the sewerage services provided for this site, overall, how satisfied or dissatisfied are you with your sewerage services? / Q28: How satisfied or dissatisfied are you with [RETAILER'S] services? Note to bar chart: data labels <4% not shown

Reasons for service dissatisfaction

Among customers dissatisfied with one or more aspects of service, the main reasons focus on problems with water quality, issues with sewers/drains and poor customer service.

Retail (113)

Poor customer service	50%
Bill inaccurate	36%
Meter readings wrong/not taken	24%
Poor service/issues not resolved	23%
Not taking ownership of problems	20%
Delay in responding to query/contact	16%

Water (28)*

Poor water quality	26%
Problems with water pressure	24%
Bills are generally too expensive**	19%
Poor customer service***	15%
Inaccurate bills***	13%
Leaks/leaking pipes	12%
Costs have risen	12%

Sewerage (24)*

Problems with sewers/drains	31%
Collapsed sewers/drains	28%
Cost/prices have risen	27%
Poor customer service	20%

****Bills being generally too expensive could be linked to rising costs, or inaccurate estimation. In the case of inaccurate estimation it would be the retailer's responsibility**

*****Dissatisfaction with customer service and inaccurate bills (areas that retailers are responsible for) suggests ongoing confusion over retailer and wholesaler responsibility, and where retail services (e.g. customer service, accuracy of bills) are linked to the wholesaler this affects perceptions of the wholesaler.**

Base: as shown. Q06: Why are you dissatisfied with the water supplied to your site?/Q09: Why are you dissatisfied with the sewerage services supplied to your site?/ Q29: why are you dissatisfied? *caution low base size (<30).

Satisfaction during Covid-19

Although customers are largely satisfied with the service they receive from their retail, water and sewerage suppliers, **some issues emerged…**

Of the customers who experienced issues during Covid-19, it is mostly among those forced to (temporarily) close, and/or those where water is key to the successful day to day operation of the business.

In the main, the **issues experienced** have centred **around** the **lack of contact and communication**. **Some have found their retailer has been particularly difficult to get hold of**, with long waiting time on the phone, and other contacts (email etc.) going unanswered for extended periods. **A couple also contacted** their **water provider** (not knowing that they needed their retailer) **and were not redirected** / informed.

In the main, customers don't want more proactive contact from their retailer, but there is an appetite for them to be more contactable and responsive when the need arises:

"I don't think I need [retailer] to do anything else particularly, but they could have more people on the phones. I tried to speak to them about the meter a few times and it was a real pain."

Arts and entertainment, South West

Issues experienced during Covid-19…

- Inaccurate/estimated bills
- Retailer uncontactable
- Lack of customer support services
- No communication/ clarity between wholesaler & retailer

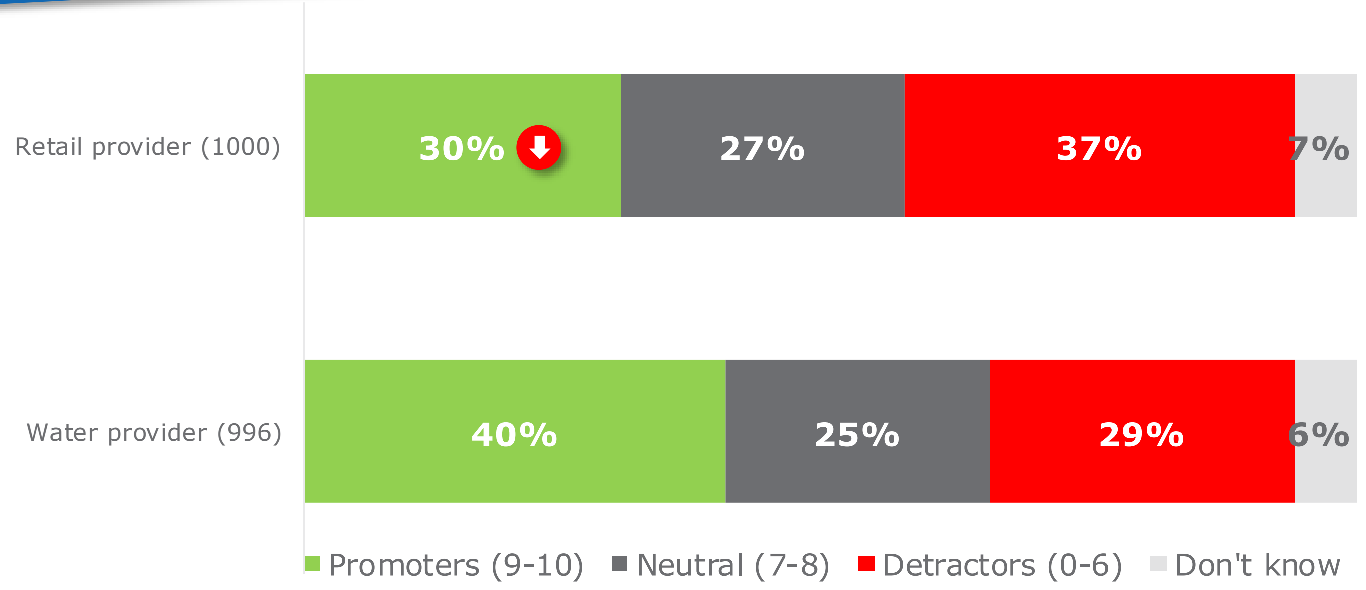
"I contacted [wholesaler] to try and tell them we were closed… they could have just told me that I needed to contact [retailer], but they didn't. I had to work it out on my own."

Salon owner, South East

Likelihood to recommend (1)

Just under a third (30%) are promoters of their retail provider, and two in five (40%) are promoters of their water services provider. (Details of sub-group differences are detailed on the next slide).

Likelihood to recommend*



	Net Promoter Score	Mean score
Retail provider (1000)	-7	6.7
Water provider (996)	+11	7.4

NPS has improved slightly for both retail and water services since 2018. Retail services NPS is now -7 compared to -20 in 2018, and water services is +11 compared to +6 in 2018.

*Likelihood to recommend only asked in relation to water and retail provider (not sewerage, surface drainage or trade effluent)

Base: as shown. Q14: How likely would you be to recommend [your water service provider] for the clean water supply services they provide? Please answer on a scale of 0-10 where 10 is extremely likely and 0 is not at all likely/Q31: How likely would you be to recommend [your retail service supplier] to others? Please answer on a scale of 0-10, where 10 is extremely likely and 0 is not at all likely.

Significantly higher/lower than comparator

Likelihood to recommend (2)

Sub-group differences in likelihood to recommend both water and retail service providers are detailed below:

Retail provider

- Businesses where Covid-19 has had a minimal impact are more likely to be promoters (38% cf. 31% moderate impact and 22% severe impact).
- Just 16% of those who have contacted their retailer are promoters, compared to 34% of those who haven't contacted.
- Customers in **Wales** are significantly more likely to be promoters than customers in **England** (54% cf. 29%).

Water provider

- Businesses where Covid-19 has had a minimal impact are more likely to be promoters (51% cf. 40% moderate impact and 34% severe impact).
- Customers in **Wales** are significantly more likely to be promoters than customers in **England** (60% cf. 39%).

Q14: How likely would you be to recommend [your water service provider] for the clean water supply services they provide? Please answer on a scale of 0-10 where 10 is extremely likely and 0 is not at all likely/ **Q31:** How likely would you be to recommend [your retail service supplier] to others? Please answer on a scale of 0-10, where 10 is extremely likely and 0 is not at all likely.

Likelihood to recommend (3)

Customers are largely unaware of the services offered by their retailer beyond the receipt of bills, and the occasional email.

Among **customers who have attempted to contact their retailer** during Covid-19, many **have been frustrated by a lack of proactive support** after the matter has been raised. There is **a sense** among some **that retailers don't have the staff or resources to keep up with demand** – and where customers are aware of the distinction between wholesale and retail provision, **many perceive** that **their retailer doesn't have** the **resources** or know-how **to provide the same or better service than their wholesaler** would if they remained in control.

Additionally, **some are inherently wary of their retailer and their competitors due to a lack of brand awareness and understanding**. For these customers there is a **need** for **more consistent communication to drive awareness, trust and likelihood to recommend**.

"It's been fine [service during Covid-19], we've had the bills and we've paid the bills. There's not much more to it than that for us… [but] I can't say I know much about them [retailer], I know that they send us our bills now, but I don't know if they are any good or not – let's hope we don't have to find out!"

Security services, North

"I suspect that with Covid-19 they've [retailer] had to furlough a load of staff, and that their front end services will have been impacted. The water bill for us isn't huge, so it's not really been a major problem, but we haven't been able to get it [a persistent billing issue] sorted… I'm not sure the people there fully know the ropes."

Hospitality, South

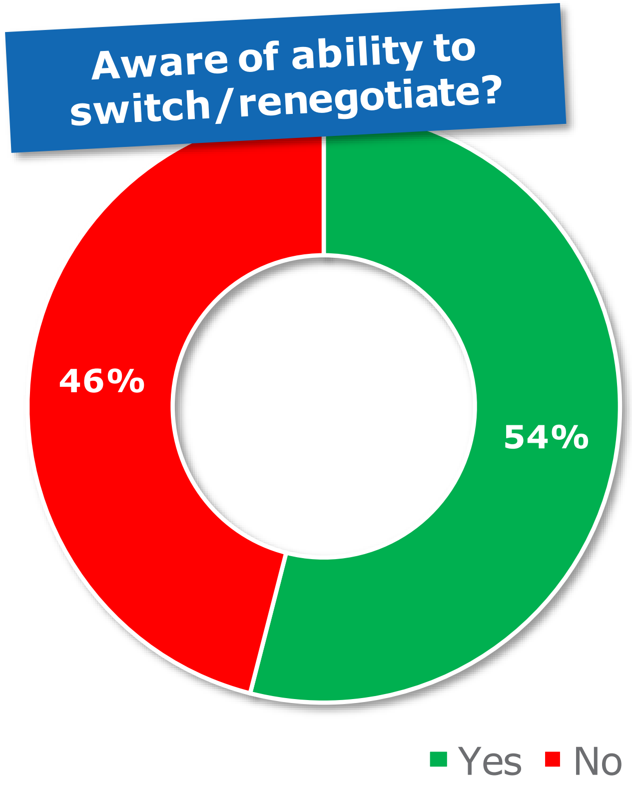
"I'd never heard of them [retailer] when I first got my bill… to be honest I did look at switching, but I didn't know any of them either, so I stuck with [retailer]"

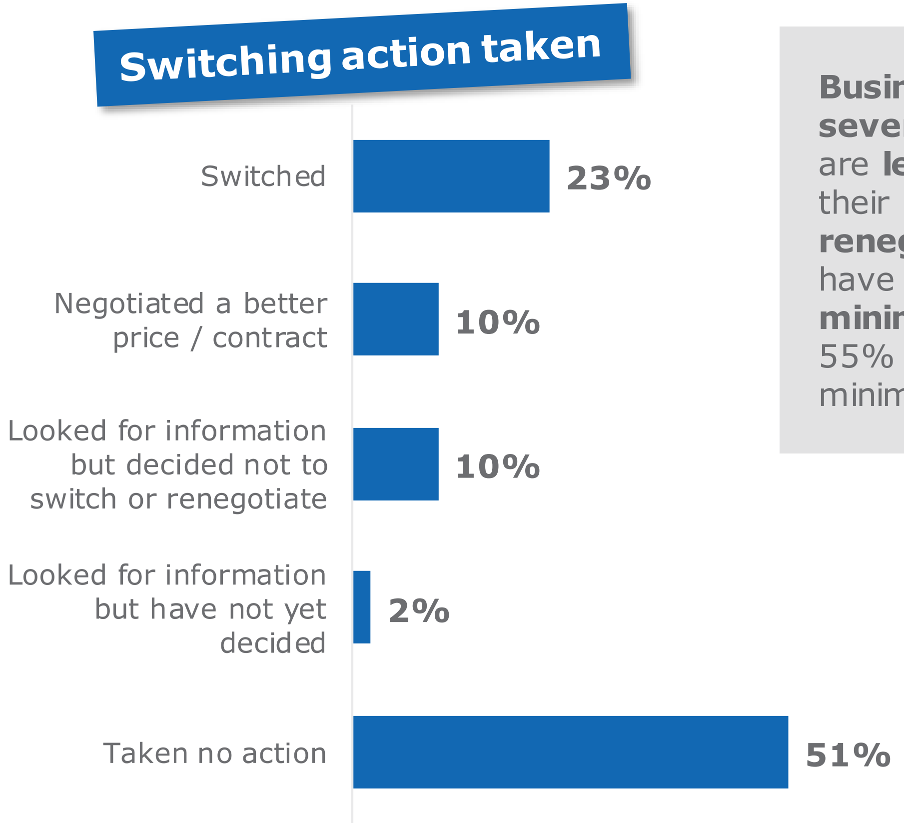
Professional services, North

5. Awareness of the retail market and switching or renegotiating behaviour

Awareness of the retail market

Just over half (54%) are aware of the ability to switch retailer or negotiate a better deal with their existing provider. Among those who are aware, almost a quarter (23%) say they have switched or renegotiated, but just over half (51%) say they have taken no action.





Businesses who have been **severely impacted by Covid-19** are **less likely to be aware of** their **ability to switch** retailer **or renegotiate than** those who have been **moderately** or **minimally impacted** (46% cf. 55% moderate impact and 63% minimal impact).

Base: all respondents in England (795). Q15: Since April 2017, businesses, charities and public sector organisations in England have been able to change the company providing their retail services (as they are able to with energy), or negotiate a better deal with their existing service provider. Retailers provide bills, customer services and read any water meters at this site. Were you aware of this prior to this survey? / Q16: Since this change, has your organisation…

Switching / renegotiating behaviour during Covid-19

A number of customers are aware they are now able to switch provider or renegotiate if they wish, but in many cases it's a very low priority.

Customers where water and other utilities make up a significant proportion of overheads tend to be more aware of the ability to switch or renegotiate.

However, most of these customers would expect their Third Party Intermediary (TPI) to bundle water in with gas and electricity in order to save them time and potential hassle. They often find that not to be the case, and as a result the incentive/likelihood to switch is diminished.

For customers where water and other utilities make up a lower proportion of overheads, even if they are aware of the ability to switch or renegotiate, other priorities (especially during Covid-19) often take over, and any notion of switching is pushed back or forgotten.

"I'm aware that I can switch now, but we don't have the time to look at it. Our gas and electric is all sorted by another company, they sort it out for us every year to get the cheapest deal, and we go with that. I've asked them about water a couple of times, but they're not doing it"

Manufacturing, Midlands

"It's not something I really think about to be honest. We get the bills and we pay them – it's not the biggest cost for us, so it comes down the list. We've spent a long time negotiating with landlords to get a rates reduction, and we've had to speak to our suppliers and other things as well. I've half expected to get a call off someone offering me a deal – like we get for electricity – but it's not happened yet."

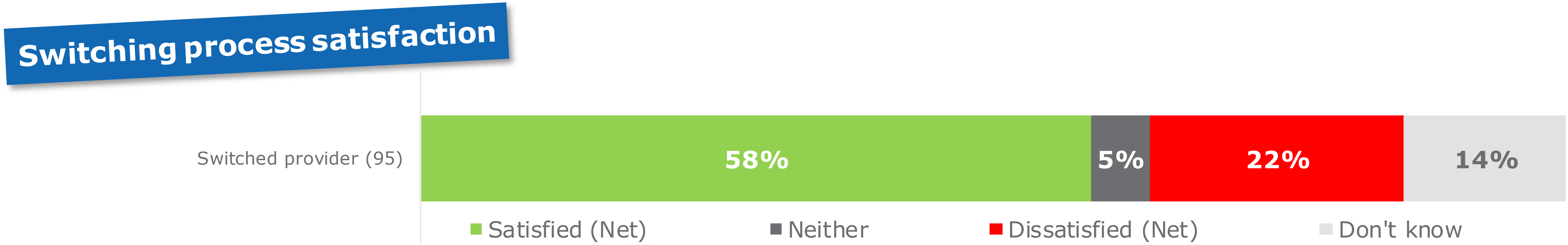
Hospitality, North

"I'm pretty sure it's the cheapest bill we have! Something would have to really go wrong for us to want to switch."

Professional services, South

Satisfaction with the switching process

Among those who have switched, almost three in five (58%) were satisfied with the process, but a significant minority (22%) were dissatisfied.



The **top reasons for being dissatisfied** with the switching process focus on; **closing bills** being **inaccurate** (88%), the **process taking too long** (50%), the **new account details** (name, payment schedule etc.) **being incorrect** (37%); **errors in the contract** (26%), and **meter readings being incorrect** (18%).

All but one customer (of 21) **who had switched and was dissatisfied identified two or more reasons for their dissatisfaction, suggesting that issues were not isolated or one off.**

Base: as shown. Q21: Overall, how satisfied or dissatisfied were you with the switching process?

QUANTITATIVE RESEARCH

Reasons for deciding not to switch

The top reasons for not switching are related to a perceived lack of difference in price and/or quality, being satisfied with their current provider and being too busy to act.

Reasons for not (yet) switching

Not a big difference in price/quality	**38%**
Happy with current provider/don't want to switch	**34%**
Too busy/not enough time/ not a priority at the moment	**4%**
Haven't had the business for that long	**4%**
I am looking into switching	**2%**

Overall, customers are **wanting / expecting less of a saving to switch** than in 2018**, but a higher proportion are also likely to switch based on service** rather than price**.**

Inducements to switch

27% would switch for up to a 5% saving (cf. 19% in 2018); **20%** would switch for a 6-10% saving (cf. 27% in 2018); **14%** would switch for an 11-20% saving (cf. 18% in 2018), and; **11%** would only switch for a saving of more than 20% (cf. 16% in 2018).

16% would not switch (cf. 15% in 2018)

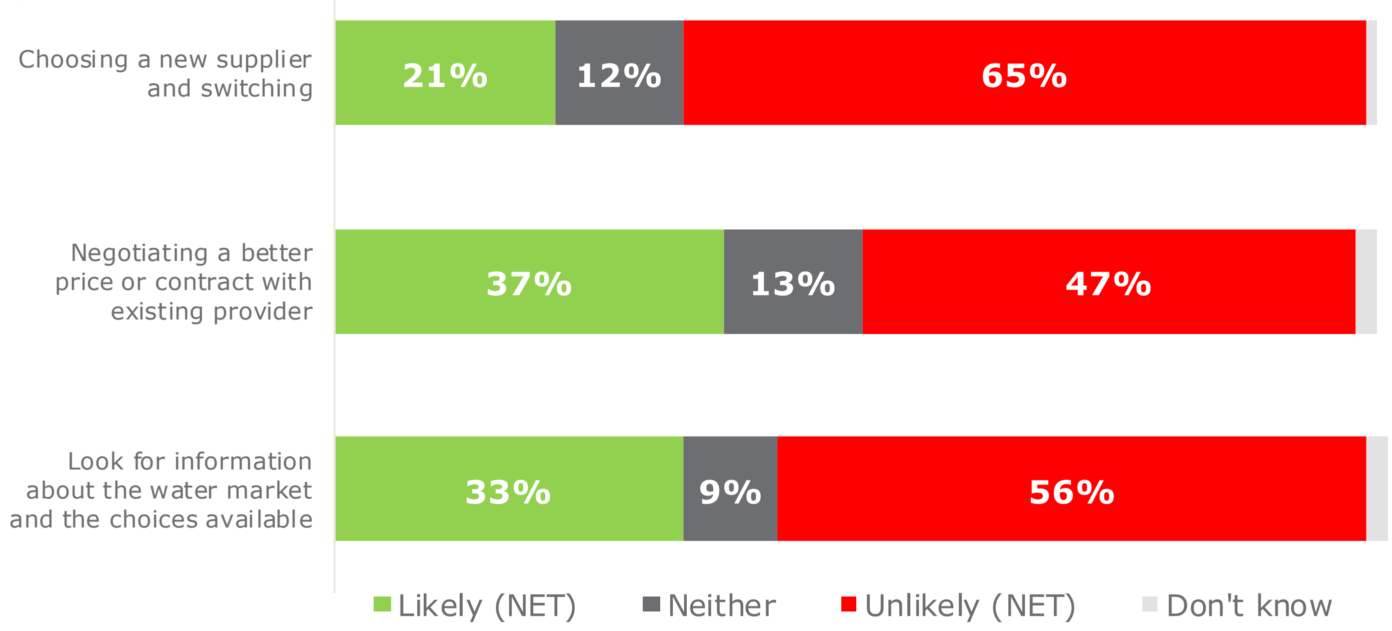
13% would only switch due to service (cf. 5% in 2018)

Base: all respondents in England aware of the ability to switch who have taken action but not yet switched (78). Q23: Could you tell me the main reason you have chosen not to switch? / Q24: What percentage level of saving on your water and sewerage charges would prompt / prompted your business to switch service provider?

Future switching intention

Just over a fifth (21%) say they are likely to choose a new supplier and switch in the next six months, while almost two-fifths (37%) say they are likely to negotiate a better price or contract with their existing provider.

Switching action, likelihood of…



39% of **those whose water bills represent 6-10% of running costs** say they **are likely to choose a new supplier and switch** in the next 6 months.

Half (50%) **of those who are dissatisfied with their retailer** say they **are likely to choose a new supplier and switch** within the next 6 months.

Those who have **received support from their** water **retailer during Covid-19** are **significantly more likely** to say they are likely to **negotiate a better price / contact with their existing retailer** in the next 6 months than those who didn't receive support **(47% cf. 33%)**

Base: all respondents in England (795). Q25: How likely or unlikely is your organisation to do each of the following in the next 6 months… Note: data labels <4% not shown.

QUANTITATIVE RESEARCH

6. Indicative comparisons to previous waves

Indicative comparisons: introduction

The 2020 survey broadly replicated the 2018 survey and was intended to provide a like for like comparison on key metrics with previous iterations of the survey.

However, the project timelines coincided with the outbreak of the Covid-19 pandemic, and the subsequent lockdowns implemented by the UK government in March and November 2020 and January 2021.

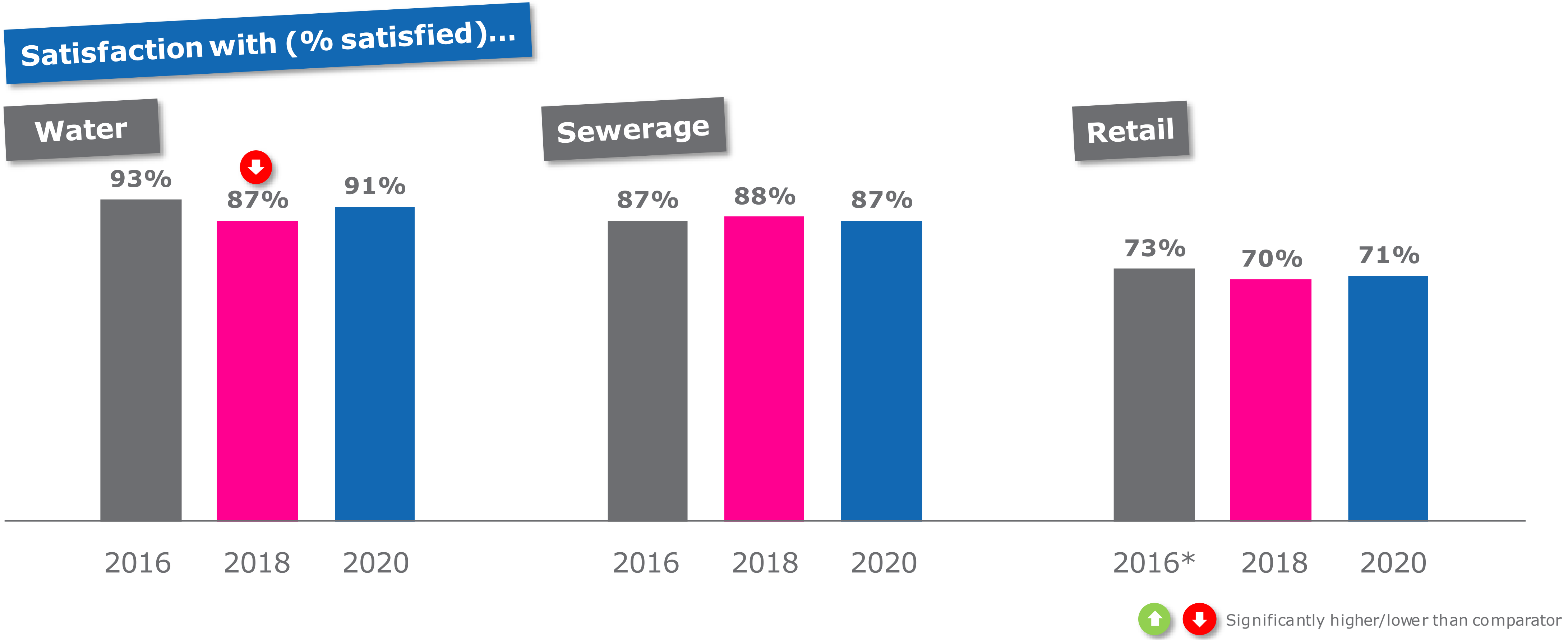
Each of these lockdowns required a number of sectors and industries in England and Wales to close, and in each lockdown large numbers of employees across most sectors were placed on furlough, and this has meant that trend analysis with the data collected in 2020/21 is not likely to provide a true like for like comparison with previous Testing the Waters surveys.

The original project scope was to conduct 2,300 interviews with business customers via a Computer Assisted Telephone Interview (CATI) between April and August 2020. However, in the event, this was not feasible. As such, 1,000 interviews were conducted (via CATI) between 7th July 2020 and 18th January 2021.

The comparisons shown on the following slides are therefore indicative, and should be treated with caution.

Service satisfaction

There are no significant differences in satisfaction across water, sewerage and retail services between 2018 and 2020. From 2016 to 2018 satisfaction in water services fell significantly, but no other significant differences are observed.



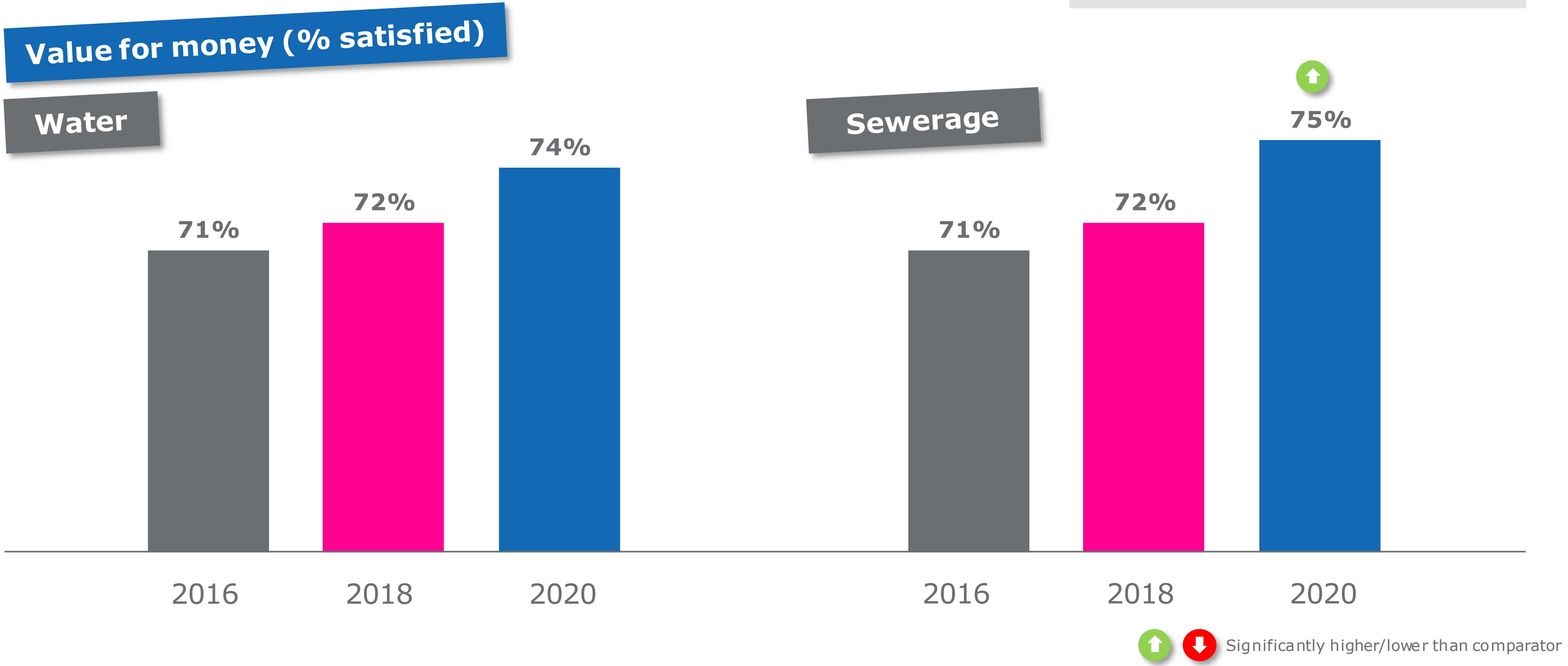
Q05_1: Thinking now about water supplied to this site for offices, toilets, or business processes, overall, how satisfied or dissatisfied are you with the water supply for this site?/Q05_2: Thinking now about the sewerage services provided for this site, overall, how satisfied or dissatisfied are you with your sewerage services? / Q28: How satisfied or dissatisfied are you with [RETAILER'S] services?

Note: 2016 was before retail services opened up to the majority of business customers in England

Value for money

Perceptions of the value for money of sewerage services have increased significantly since 2016. Otherwise, perceptions remain stable.

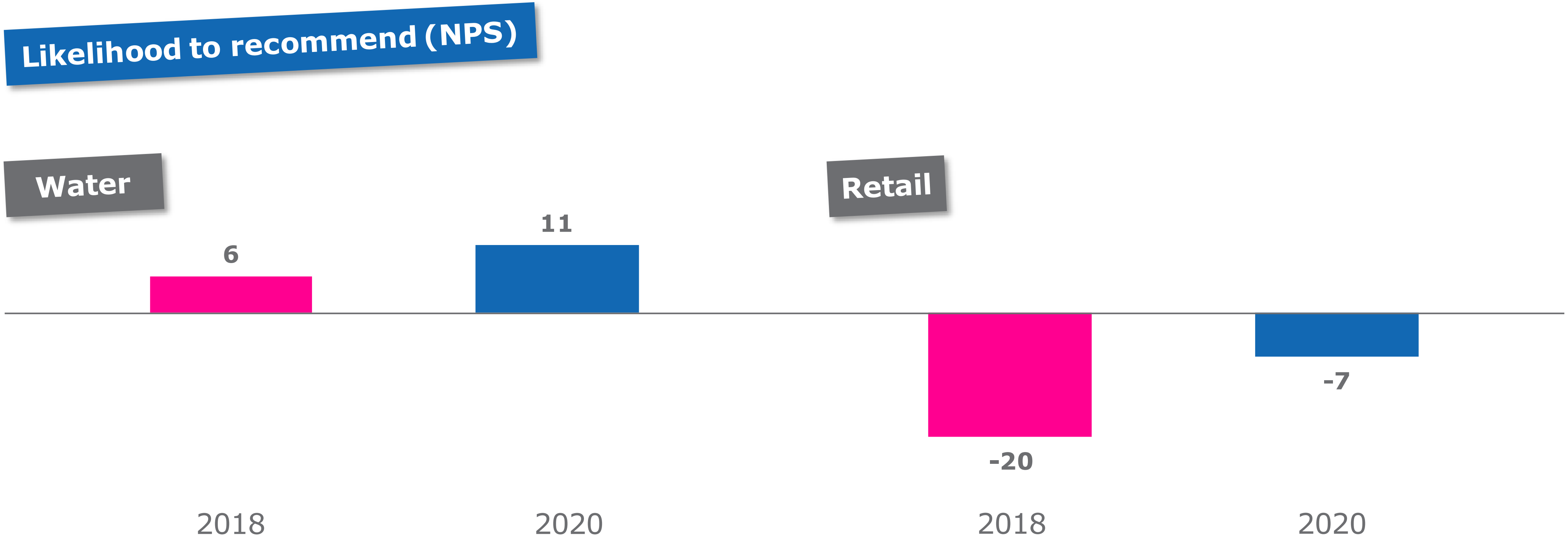
Larger businesses (+50 staff) are **less satisfied with** the **value for money of** their **water supply** (55%)



Q03: How satisfied or dissatisfied are you with the value for money of…

Likelihood to recommend

The Net Promoter Score (NPS) – the proportion of customers who rate their likelihood to recommend as a 9 or 10, minus the proportion of customers who rate their likelihood to recommend as a 0-6 - for retail services remains negative in 2020/21 but does show some signs of improvement since 2018.

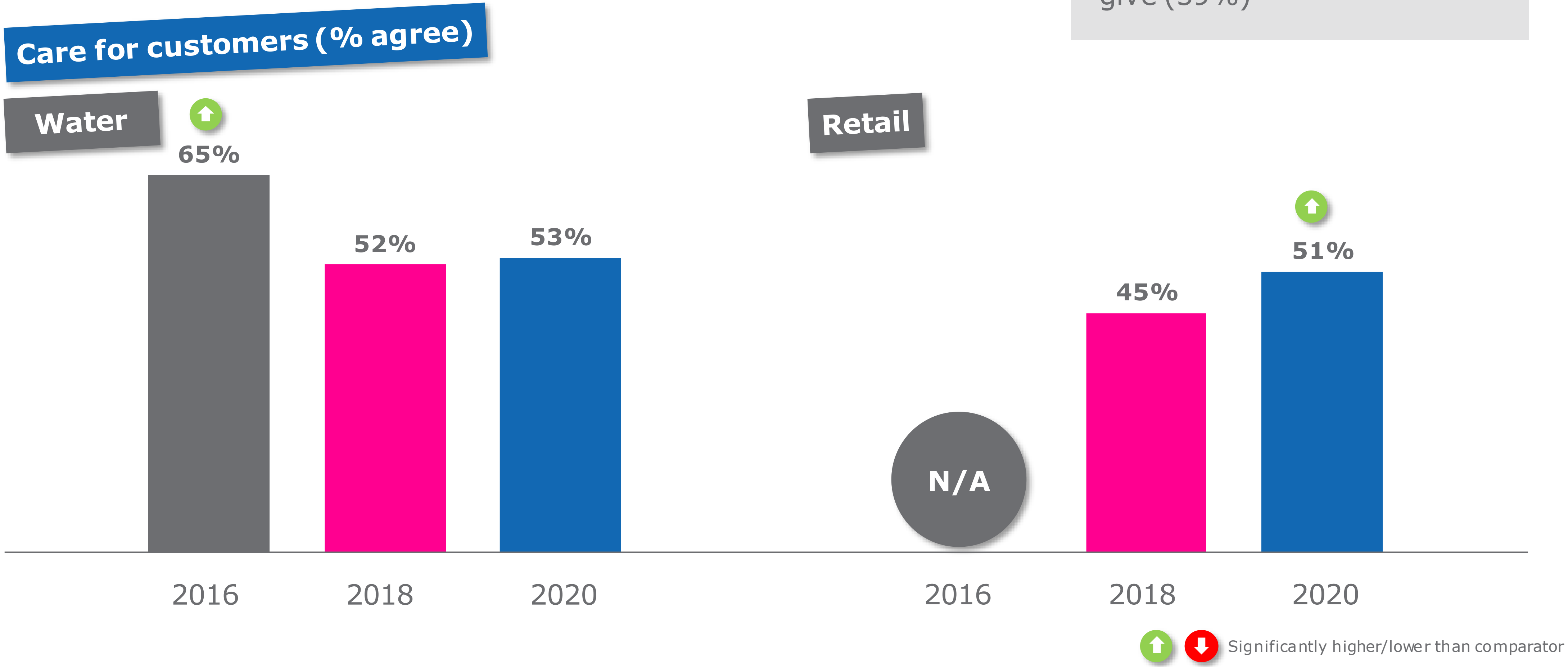


Q14: How likely would you be to recommend [WATER SERVICE] for the clean water supply services they provide? Please answer on a scale of 0-10 where 10 is extremely likely and 0 is not at all likely / Q31: How likely would you be to recommend [RETAILER] to others? Please answer on a scale of 0-10, where 10 is extremely likely and 0 is not at all likely

Caring for customers

Customers are more likely to agree that their retail provider cares about the service it gives to customers in 2020/21 than in 2018 (51% cf. 45%). There is no change in perceptions of water providers caring between 2018 and 2020/21.

Larger businesses (+50 staff) are **more likely to think** their **water provider cares** about the service they give (59%)

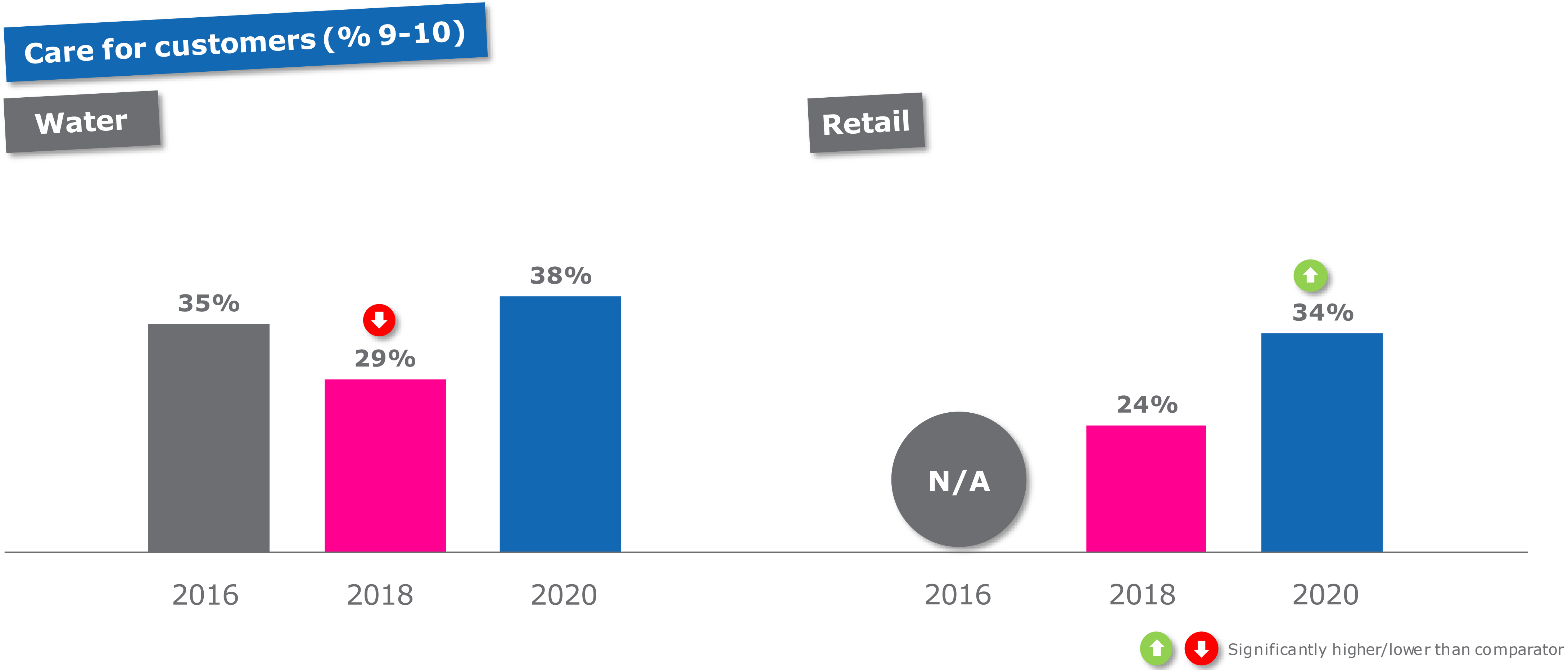


Q11: How much do you agree or disagree that [WATER SERVICE PROVIDER] cares about the service it gives to business customers? / Q26: How much do you agree or disagree that [RETAILER] cares about the service it gives to business customers?

Trust

Trust in water service providers has increased from 2018 and is now in line with the 2016 level. For retail services, levels of trust have also increased from 2018.

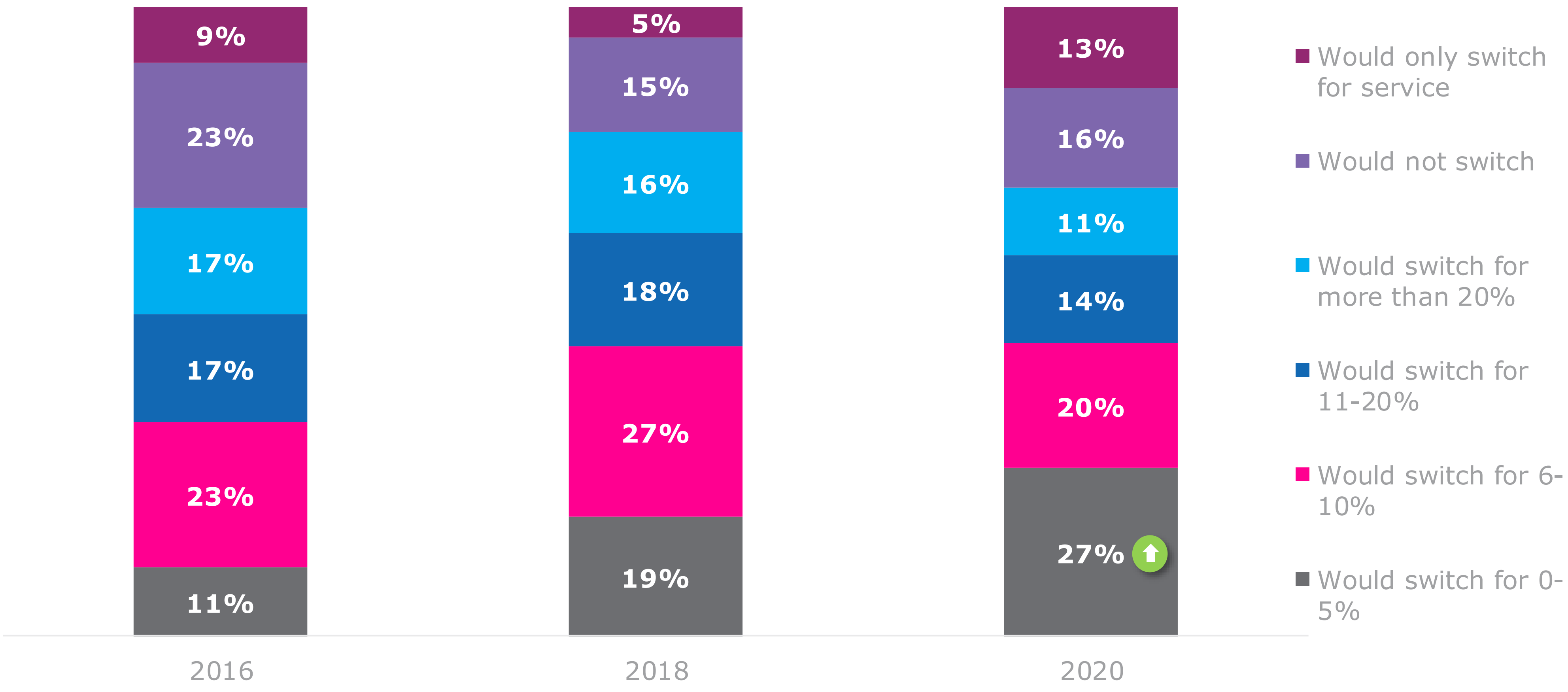
No significant differences in perceptions of trust by company size



Q13: How much do you trust [WATER SERVICE PROVIDER]? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all? /Q30: How much do you trust [RETAILER]? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all?

Percentage saving required to switch (England)

Customers are more likely to switch for a saving of 0-5% in 2020 than they were in 2016 (27% cf. 11%).



Base: all respondents in England aware of the ability to switch who have taken action but not yet switched (78). Q23: Could you tell me the main reason you have chosen not to switch? / Q24: What percentage level of saving on your water and sewerage charges would prompt / prompted your business to switch service provider?

Significantly higher/lower than comparator

QUANTITATIVE RESEARCH

7. England vs. Wales comparisons

Significantly higher/lower than comparator

England vs. Wales: significant differences

	England	Wales
Q03_1: satisfaction with value for money of water services (% agree)	74%	81% ⬆
Q03_2: satisfaction with value for money of sewerage services (% agree)	75%	84% ⬆
Q07: water saving action taken (% taken some measures)	46% ⬆	39%
Q11: water services provider cares about the service it gives its customers (% agree)	52%	69% ⬆
Q13: trust in water services provider (% 9-10; trust completely)	37%	55% ⬆
Q14: likelihood to recommend water services provider (% 9-10; promoters)	39%	60% ⬆
Q26: retailer cares about the service it gives its customers (% agree)	50%	74% ⬆
Q27: bills are clear and easy to understand (% agree)	78%	87% ⬆
Q28: overall satisfaction with retailer (% satisfied)	68%	85% ⬆
Q30: trust in retailer (% 9-10; trust completely)	33%	54% ⬆
Q31: likelihood to recommend retailer (% 9-10; promoters)	29%	54% ⬆
Q32: contacted retailer in last 12 months? (% yes)	23% ⬆	11%
Q37: support from retailer during lockdown? (% yes)	22% ⬆	16%

8. Conclusions

Conclusions

Almost a third (31%) of customers report Covid-19 having had a severe impact on their business, forcing them to re-evaluate their plans for the future. For those businesses most severely affected, the primary focus was on reducing overheads as far as possible, and taking advantage of all government support on offer (including furlough etc.). The businesses who were most severely affected by Covid-19 measures were less likely to be satisfied with their overall service and value for money than businesses that were less severely affected.

Businesses reported a mixed picture in relation to proactive support received from suppliers, providers and landlords during Covid-19. Overall, banks and other financial services providers were thought to have been the best at offering proactive support, followed by telecoms and utilities providers, including water. And where the offer of support was received it was most often through email or letter.

Just over a fifth (22%) of businesses recall having contact from their water company offering support or information during Covid-19. Businesses severely impacted by Covid-19 were more likely to recall having received some information or support than those minimally impacted, but this was often by email or letter and as a result few felt that retailers had gone 'above and beyond' in their support. Despite this, businesses that recalled some form of proactive contact from their retailer were more likely to have high levels of trust in their providers and to agree that their providers care about the service they provide.

Conclusions

Generally, businesses that received contact, information or support from their water company during Covid-19 recall it being during the first lockdown, with little or nothing after that. For some businesses that looked for information or support themselves, confusion over the role of retailers and wholesalers looks to have caused some additional issues.

Overall, there is little appetite from customers to receive more information from their retailers, but there is a need to be able to get quick and efficient access to help and support when it's needed. Some businesses found that when they needed to contact their retailer during Covid-19 they were subjected to excessive waiting times on the phone, or that they were not able to get through to anyone at all, and that additional contact attempts by email went unanswered.

The majority of business customers agree that their water provider(s) care for customers, but for the majority the relationship is purely transactional, with little or no emotional attachment.

The majority are satisfied with all aspects of their water service provision, but customers are significantly more likely to be satisfied with their water provider than their retail provider. This also extends to likelihood to recommend and trust, and is driven – at least in part – by the lower brand awareness of retailers (in England) than wholesalers, and in some cases, poor contact and customer service experience.

Conclusions

Over half of business customers in England are aware of the ability to switch their retail provider, and/or renegotiate their contract with their existing provider. Among those who are aware, almost a quarter have switched, but just over half have taken no action, usually because they see no obvious benefits to switching – especially among SMEs.

Customers are beginning to expect or want a lower level of saving on their bill to prompt them to consider switching – with over a quarter now saying a saving of up to 5% would prompt them to switch compared to just over a tenth in 2016. However, the proportion of customers who would only switch due to service reasons has also increased.

Customers in Wales are significantly more satisfied with their overall service provision than customers in England. This extends to several other measures including value for money, trust, likelihood to recommend and the extent to which providers care about their service offering. However, customers in England are more likely to have been proactively contacted by their retailer during Covid-19.

The majority of customers across England and Wales are satisfied with their overall service provision. But where customers are dissatisfied it tends to be driven by water quality issues, problems with sewers/drains and poor customer service.

9. Appendix 1: setting the scene, background and objectives

Additional context: setting the scene

The 2020 survey broadly replicated the 2018 survey (with some minor changes and updates) and was intended to provide a like for like comparison on key metrics with 2018, and (where possible) earlier iterations as well.

However, the original project timelines for the 2020 Testing the Waters survey coincided with the outbreak of the Covid-19 pandemic, and the subsequent lockdowns implemented by the UK government in March and November 2020 and January 2021.

Each of these lockdowns required a number of sectors and industries in England and Wales to close, and in each lockdown large numbers of employees across most sectors were placed on furlough, and this has meant that trend analysis with the data collected in 2020/21 is not likely to provide a true like for like comparison with previous Testing the Waters surveys.

The 2020 iteration of the Testing the Waters survey is therefore, largely, treated as a standalone project, designed to give a snapshot of customer perceptions and sentiment during the Covid-19 pandemic. To further support this objective, depth interviews were added to give additional context to the quantitative findings. In total, 20 telephone depth interviews were conducted with businesses in March and April 2021, with the aim of understanding – from customers – what the impact of Covid-19 had been on their business generally, and how their water and utilities accounts had been managed during this time.

The original quantitative project scope was to conduct 2,300 interviews with business customers via a Computer Assisted Telephone Interview (CATI) between April and August 2020. However, in the event, this was not feasible. As such, 1,000 interviews were conducted (via CATI) between 7th July 2020 and 18th January 2021.

Additional context: background and objectives

The **research objectives** were to measure and track key measures (shown below) among business customers in England and Wales:

- Business customer perceptions of the value for money across all aspects of their water and sewerage services
- Business customer satisfaction with all aspects of their water and sewerage service delivery, including:
  - Satisfaction with supplier attitude towards their business (the extent to customers believe providers care about their customers); satisfaction with any contact experiences over the past 12 months, and; likelihood to recommend providers
- Business' experience of the retail market (where applicable), including:
  - Awareness of the market, retailers and where to find information
  - Experiences of switching (where applicable), and future switching intentions

The original project scope was to conduct 2,300 interviews with business customers via a Computer Assisted Telephone Interview (CATI) between April and August 2020. However, in the event, the Covid-19 pandemic meant that this target was not feasible. As such, 1,000 interviews were conducted (via CATI) between 7th July 2020 and 18th January 2021.

In January 2021 – when England and Wales were both in their 3rd lockdown, and significant numbers of businesses remained closed due to lockdown restrictions – it was decided that interviewing should stop, and that an alternative approach to concluding the research should be taken.

The approach taken from January 2021 was to take the data collected and to weight it to the overall business population of England and Wales combined, and England and Wales separately.

9. Appendix 2: methodology

Methodology (1)

After consultation between CCW and DJS Research it was decided that due to the significantly different context in which the 2020 survey was conducted and the reduced sample size, it should be viewed as a snap shot of customer views in an exceptional time, rather than as a pure tracking survey.

A qualitative element was added to better understand the experiences of businesses at this time. Twenty in-depth telephone interviews were conducted with businesses[5] with the objective of understanding experiences during Covid-19, and more specifically experiences of the service provided by water providers.

A section of the report providing indicative comparisons with previous years' tracking data is included, but any comparisons should be treated with caution.

The **sample** consisted of businesses, charities, and public sector organisations in England and Wales who (ordinarily) operate from a dedicated business premises[6] and are billed directly for their water and/or sewerage services.

The **questionnaire** was reviewed and minor changes to the 2018 survey were made. Two questions about Covid-19[7] were included and asked to all respondents.

5 17 of the 20 depth interviews were conducted with businesses who had taken part in the quantitative research. An additional 3 interviews were sourced from a panel provider. The three additional interviews were screened to make sure they met the criteria of the qualitative element.
6 During the fieldwork period, a significant number of businesses were required to have staff work from home wherever possible. Businesses who had (temporarily) transitioned to a work from home policy but still retained a business premises were still eligible to take part.
7 The first question in relation to Covid-19 was "Since the UK went into lockdown on 23rd March 2020, has your water retailer contacted you to offer any support or information, relating to billing arrangements?; Yes / No / Don't know" and the second was "Which of the following statements best reflects your organisation's future outlook with regards to Covid-19?; Covid-19 has had a minimal effect on our business, and we are continuing to plan as normal / Covid-19 had an effect on our business during lockdown, but we are planning for the future as normal / Covid-19 has had a severe effect on our business and we are having to re-evaluate our plans for the future / don't know or prefer not to say"

Methodology (2)

Following the conclusion of fieldwork, **weighting** was applied to the data. The data weighting relies on three key questions:

- Water region (wholesale / WaSC region)
- Business size
- Business sector

The plan was to weight within water wholesale (or WaSC) region to match the eligible business population in terms of size and sector (and to match the 2018 weighting approach); however, due to the reduced sample size, weighting is applied at a broad region level in order to give a large enough base to avoid the use of extreme weighting factors.

Weights are calculated for each respondent taking into account (broad) region, sector and size, and are calculated against the eligible business population[8].

Two weights are applied to the data, as shown to the right:

1. Weight 1 is a weight that ensures the total sample is representative of the England and Wales business population across regions, size and sector;
   a) Due to the sample achieved, this 'down-weights' the Welsh respondents so that these businesses account for c.5% of the total eligible businesses to match the overall England and Wales profile
2. Weight two is a weight that ensures that the Wales sample reflects the profile of Welsh businesses and that the England sample reflects the profile of English businesses

Throughout the report, weight 1 is used for total and sub-group data, and weight 2 is used for comparisons between England and Wales.

8: The eligible business population is calculated by first taking business population statistics from the ONS (source: https://www.ons.gov.uk/releases/ukbusinessactivitysizeandlocation2020) and then using eligibility statistics from the previous Testing the Waters survey in 2018, conducted by ORS (source: https://www.ccwater.org.uk/wp-content/uploads/2019/04/Data-report-Testing-the-Waters-Business-customers-views-on-their-water-and-sewerage-services-2018-1.pdf)

Methodology (3)

Interpreting the data: throughout this report significant differences between sub-groups (e.g. England vs. Wales) are noted.

Where significant differences are noted, it is at a 95% confidence interval, meaning that there is a 95% probability that the difference is truly significant.

When comparing 2020/21 data with previous years' in section 4, significant differences are mentioned in the associated commentary, but are not shown/marked as significant on the charts/graphs themselves, owing to the different approach and background context to this iteration of the survey.

Please note that where percentages do not add up to 100% this may be due to rounding, or as a result of a question where multiple responses were permitted.

Low base sizes (<50) are noted on each slide where applicable.

When navigating this report, slides with a grey bar to the right-hand side denote introductory or explanatory slides, slides with a blue bar to the right-hand side denote quantitative data from the CATI survey, and slides with a pink bar to the right-hand side denote qualitative findings from the tele-depth interviews.

Methodology (4)

Qualitative research: twenty 30-40 minute in-depth telephone interviews with eligible business customers were conducted after the quantitative survey had closed. Respondents were recruited to four distinct groups:

Group 1: customers who had been severely impacted by Covid-19 restrictions and had been forced to close during at least one lockdown (tended to be hospitality, arts and entertainment and retail).

Group 2: customers who had to significantly change their working practices during Covid-19, for example moving to working from home (tended to be professional services).

Group 3: customers who had continued to conduct business largely as normal during Covid-19 (tended to be manufacturing, construction, essential retail and public sector).

Group 4: customers who had contacted their water wholesaler during Covid-19 (a cross-section of businesses).

Across each group, a mix of businesses were recruited by region and size, and where possible sector as well.

7. **Appendix 3:** questionnaire

Questionnaire

Questionnaire: Testing the Waters

djs research

Client name:	CCW
Project name:	Testing the Waters
Job number:	7195
Methodology:	CATI
Version	4

Notes on this document

- Instructions in CAPS are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
  - Screener questions are labelled S01, S02, S03 etc.
  - Main survey questions are labelled Q01, Q02, Q03 etc.
  - Further demographic / classification questions are labelled C01, C02, C03 etc.
  - Number codes are included on each question for data processing purposes

1

Questionnaire quality checklist

Please use this list to check your script before it is sent to data for set up. Speak to your PM if you are unsure about any of these checks.

	Are quotas or sampling requirements clearly specified?	
Labelling	Is the script labelled with the client name, job, project code and version?	
	Do all questions have a unique number?	
	Are all questions numbered consistently with proper conventions for screener (S0X) and classification (C0X) questions?	
	Have all information pages been entered correctly as 'INFO1', 'INFO2'…	
	Have all notes to data (which aren't questions) been entered onto one line starting with 'DP NOTE:'?	
	Is each question to one of the specified question types? (See 'labelling_questionnaire.xls' in your project file if you aren't sure).	
	Have all grid questions been entered into separate tables with the grid label (column) first then a separate table for grid item (row)?	
Routing, ordering	Does each question have a base description which begins 'Base:'?	
	Are routing instructions easy to understand, do they reference the correct questions earlier in the survey?	
	Are exclusive and fixed codes identified where necessary?	
	Are answer lists ordered or randomized appropriately?	
Language	Is the phrasing of each question complete, simple and easily read on screen and aloud?	
	Is the phrasing of each question appropriate for its delivery mode (self-completion or interviewer led)?	
	Do the answer codes of closed questions relate directly to the question?	
NR	Have options for 'other, don't know etc.' been deployed appropriately?	
	Do all sensitive or personal questions include 'Prefer not to say'?	
Code labels	Are answer options coded correctly (Unique, sequential order 1~79)	
	Are all DK/PNTS options coded correctly? (80~99) • Other (80 - 82) • Don't know (85) • Prefer not to say / refused (86) • None of the above / not applicable (87) • Can't remember (88) • Not stated / not answered (89)	
Quality	Does this survey require any of the following? Include if appropriate • Contact collection for further research • Contact collection for interviewer validation • Attention or data quality check questions	
	Have you proof-read the questionnaire for spelling and grammatical errors?	

Please confirm that you have checked this script against these criteria:

Initials		**Date**	

2

Introduction

My name is……………………, and I am calling from DJS Research Ltd, an independent research consultancy.

We are carrying out research on behalf of the Consumer Council for Water (referred to as CCW), the water watchdog who are responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are speaking to a cross section of businesses to understand perceptions of their current water and sewerage service.

INTERVIEWER: ASK IF THE PERSON RESPONSIBLE FOR PAYING THE WATER BILL IS AVAILABLE TO TAKE PART IN A 15 MINUTE SURVEY ABOUT THEIR WATER AND SEWERAGE SERVICE.

IF NO:
Ask when would be a convenient time to call back; make call back appointment

IF YES & PUT THROUGH:
Thank you for taking my call. My name is…………..and I am calling from DJS Research Ltd, an independent market research company. We are carrying out research on behalf of the Consumer Council for Water (referred to as CCW), the water watchdog who are responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are speaking to a cross section of businesses to understand perceptions of their current water and sewerage service.

Please can you spare us 15 minutes to give us your opinion on this?

The interview will be conducted under the Market Research Society Rules guaranteeing anonymity and there would be strictly no sales or other comeback from your participation.

3

Questionnaire

SCREENER

S01.

Base: All respondents

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

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes – deals with utility suppliers		CONTINUE
2	Yes – pays the bills		CONTINUE
3	Yes - both		CONTINUE
4	No		REVERT TO INTRO AND FIND RELEVANT PERSON / CLOSE

S07.

Base: All respondents

Is your business usually (i.e. pre-Covid-19) run from a business premises or from somewhere else, e.g. a home residence or a mobile business?

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Business premises		
2	No fixed business premises (e.g. van / home residence)		THANK & CLOSE
85	Don't know		THANK & CLOSE

S02.

Base: All respondents

Are you a…?

INT: Read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Company representative on-site		
2	Head office company representative		
3	Both		
80	Other *(specify)*	OPEN	

S03.

Base: All respondents

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

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know *(do not read out)*		

S04a.

Base: All respondents

How many sites does your business have in England?

OPEN RESPONSE. NUMERIC

Code	Answer list	Scripting notes	Routing
85	Don't know *(do not read out)*		CLOSE

S04b.

Base: All respondents

How many sites does your business have in Wales?

OPEN RESPONSE. NUMERIC

Code	Answer list	Scripting notes	Routing
85	Don't know *(do not read out)*		CLOSE

DATA: IF SUM OF S04a and S04b = 0, THANK AND CLOSE. IF SUM IS 1+ CONTINUE

S04c.

Base: Ask if 1+ at S04a AND S04b

Is the site you work at based in England or Wales?

SINGLE RESPONSE. NUMERIC

Code	Answer list	Scripting notes	Routing
1	England		
2	Wales		
85	Don't know *(do not read out)*		CLOSE

DATA:

IF TOTAL NUMBER OF SITES AT S04a IS 1+ AND TOTAL NUMBER OF SITES AT S04b IS 0, OR S04c IS CODE 1 (ENGLAND) – CODE AS ENGLAND

IF TOTAL NUMBER OF SITES AT S04b IS 1+ AND TOTAL NUMBER OF SITES AT S04a IS 0, OR S04c IS CODE 2 (WALES) – CODE AS WALES

S05.

Base: All respondents

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

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	1		
2	2-10		
3	11-50		
4	51-100		
5	101-250		
6	More than 250		
85	Don't know		

Questionnaire

S06.

Base: Ask if sum of S04a and S04b is >1

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

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	1		
2	2-10		
3	11-50		
4	51-100		
5	101-250		
6	More than 250		
85	Don't know		

INFO1.

Base: All respondents

From this point on the questions are about the business site which you usually work at.

S08.

Base: All respondents

Would you say the nature of your business is mainly...

INT: Tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Agriculture, Forestry and Fishing		
2	Mining and Quarrying		
3	Manufacturing		
4	Electricity, Gas, Steam and Air Conditioning Supply		
5	Water Supply; Sewerage, Waste Management and Remediation Activities		
6	Construction		
7	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles		
8	Transportation and Storage		
9	Accommodation and Food Service Activities		
10	Information and Communication		
11	Financial and Insurance Activities		
12	Real Estate Activities		
13	Professional, Scientific and Technical Activities		
14	Administrative and Support Service Activities		
15	Public Administration and Defence; Compulsory Social Security		
16	Education		
17	Human Health and Social Work Activities		
18	Arts, Entertainment and Recreation		
19	Other Service Activities		
80	Other *(specify)*		
85	Don't know		THANK & CLOSE

7

S09.

Base: All respondents

What water and sewerage services are you billed for at this site? (INTERVIEWER, IF NECESSARY: this is the site that you usually work at)

INT: Tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Water		
2	Sewerage		
3	Surface water (rainwater) drainage		
4	Trade Effluent removal		
80	Other *(specify)*	OPEN	
85	Don't know		THANK & CLOSE

8

S10.

Base: All respondents

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

INT: Tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Less than £500		
2	£500-£999		
3	£1,000-£1,999		
4	£2,000-£4,999		
5	£5,000-£9,999		
6	£10,000-£49,999		
7	£50,000 or more		
85	Don't know		

S11.

Base: All respondents

And for this site roughly what percentage of the total annual running costs do these services represent? Please select from the following bandings

INT: Tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Up to 5%		
2	6-10%		
3	More than 10%		
85	Don't know		

9

Questionnaire

SERVICE PROVIDERS

Q01.
Base: All respondents
Which company provides water services? (i.e. supplies clean water to the site you usually work at).

*INT: If respondent gives an answer that is not shown, refer to your retailer list (supplied separately) – and check if the **water** service provider is the corresponding company, or not*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water		
2	Dwr Cymru (Welsh Water)		
3	Hafren Dyfrdwy		
4	Northumbrian Water		
5	Severn Trent		
6	South West Water		
7	Southern Water		
8	Thames Water		
9	United Utilities		
10	Wessex Water		
11	Yorkshire Water		
12	Bournemouth Water		
13	Bristol Water		
14	Cambridge Water		
15	Cholderton Water		
16	Essex & Suffolk Water		
17	Hartlepool Water		
18	Portsmouth Water		
19	South East Water		
20	South Staffs Water		
21	SES Water		
22	Affinity Water (Central)		
23	Affinity Water (East)		
24	Affinity Water (Southeast)		
25	Private water supply doesn't come from a water company (e.g. borehole)		THANK & CLOSE
80	Other *(specify)*		
85	Don't know		

Q02.
Base: All code 2 at S09 and codes 12-24 at Q01
Which company provides sewerage and drainage services for this site (i.e. removes and treats water used by staff toilets, kitchens and also water used for business purposes where it doesn't need specialist treatment)?

*INT: If respondent gives an answer that is not shown, refer to your retailer list (supplied separately) – and check if the **water** service provider is the corresponding company, or not*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water Services Ltd		
2	Dwr Cymru (Welsh Water)		
3	Hafren Dyfrdwy		
4	Northumbrian Water Ltd		
5	Severn Trent Water Ltd		
6	South West Water Ltd		
7	Southern Water Services Ltd		
8	Thames Water Utilities Ltd		
9	United Utilities Water PLC (North West Water)		
10	Wessex Water Services Ltd		
11	Yorkshire Water Services Ltd		
12	I have a private facility/septic tank		
80	Other *(specify)*		
85	Don't know		

Q03.
Base: All respondents
How satisfied or dissatisfied are you with the value for money of…

INTERVIEWER: Read out each statement, tick one response for each statement.

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know *(do not read out)*	-	

Statement number	Statement	Scripting notes	Routing
1	The water services supplied to this site	Only show if code 1 selected at S09	
2	The sewerage service for this site	Only show if code 2 selected at S09	
3	The surface water (rainwater) drainage services for this site	Only show if code 3 selected at S09	
4	The trade effluent services for this site	Only show if code 4 selected at S09	

Questionnaire

Q04.
Base: All who disagree (codes 4/5) with at least one statement at Q03
Why do you think you don't get value for money for [INSERT STATEMENTS CODED 4 OR 5 AT Q03]?

INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cost/prices have risen		
2	Bills generally too expensive		
3	Removal of surface water is too expensive		
4	Poor/inefficient service/issues not resolved		
5	Poor water quality		
6	Problems with sewers/drains		
7	Site area surface water drainage tariff unfair		
8	Leaking pipes		
9	Water meter issues/problems		
10	Bill inaccurate		
11	Meter readings wrong / not taken		
12	Poor customer service		
13	Business wanted to switch provider but was not allowed to		
14	Not sure how to contact them		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q05.

Base: All respondents

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

INT: Read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know *(do not read out)*	-	

Q06.
Base: All who disagree (codes 4/5) at Q05
Why are you dissatisfied with the water supplied to your site?
INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cost/prices have risen		
2	Bills generally too expensive		
3	Poor/inefficient service/issues not resolved		
4	Poor water quality		
5	Problems with sewers/drains		
6	Site area surface water drainage tariff unfair		
7	Leaking pipes		
8	Water meter issues/problems		
9	Bill inaccurate		
10	Meter readings wrong / not taken		
11	Poor customer service		
12	Problems with water pressure		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q07.
Base: All respondents
What actions, if any, has your business taken to reduce its use of water at this site? *INT: Do not read out, tick all that apply*

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Nothing	EXCLUSIVE	
2	Hippo/Save A Flush device in toilet cisterns		
3	Water efficient taps		
4	Made employees aware of the need to reduce water consumption		
5	Asked for smart meters		
6	Changed business processes to use less water		
7	Rainwater harvesting		
8	Only put required amount in kettle		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q08.
Base: All code 2 at S09
Thinking now about the sewerage services provided for this site, overall, how satisfied or dissatisfied are you with your sewerage services?

INT: Read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know *(do not read out)*	-	

Q09.
Base: All who disagree (codes 4/5) at Q08
Why are you dissatisfied with the sewerage services supplied to your site?

INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cost/prices have risen		
2	Poor/inefficient service/issues not resolved		
3	Problems with sewers/drains		
4	Leaking pipes		
5	Bill inaccurate		
6	Poor customer service		
7	Problems with blockages i.e. pipes, drains, toilets, sewers etc.		
8	Problems with flooding i.e. sewage overflow etc.		
9	Problems with drains i.e. bad smells/collapsing etc.		
10	Sewerage services not providing full service i.e. having to pay additional company to pump sewage etc.		
11	Environmental concerns i.e. pumping into sea/sewage in wildlife etc.		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Questionnaire

Q010.

Base: All who have surface water services and / or trade effluent services at S09 (codes 3 and / or 4)
How satisfied or dissatisfied are you with your sewerage company's management of each of the following aspects of their service

INTERVIEWER: Read out each statement, tick one response for each statement.

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know *(do not read out)*	-	

Statement number	Statement	Scripting notes	Routing
1	Removal of surface water (rainwater) from the site	Only show if code 3 selected at S09	
2	Removal of Trade effluent	Only show if code 4 selected at S09	

WHOLESALE WATER SERVICE

INFO2.
Base: All respondents
The next set of questions are about your wholesale water service provider.

Q011.
Base: All respondents
How much do you agree or disagree that [PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80] / [IF CODE 85 AT Q01: your water service provider] cares about the service it gives to business customers?
INT: Read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Strongly agree	-	
2	Slightly agree	-	
3	Neither agree nor disagree	-	
4	slightly disagree	-	
5	Strongly disagree		
85	Don't know *(do not read out)*	-	

Q012.
Base: All code 4 or 5 at Q11
Why do you disagree that [[PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80] / [IF CODE 85 AT Q01: your water service provider]] cares about the service it gives to business customers?

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know *(do not read out)*		

Q013.
Base: All respondents
How much do you trust [PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80]/ [IF CODE 26 OR 85 AT Q01: your water service provider]? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all?

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	1 – don't trust them at all	-	
2	2	-	
3	3	-	
4	4	-	
5	5		
6	6		
7	7		
8	8		
9	9		
10	10 – trust them completely		
85	Don't know *(do not read out)*	-	

Q014.
Base: All respondents
How likely would you be to recommend [PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80] / [IF CODE 85 AT Q01: your water service provider] for the clean water supply services they provide? Please answer on a scale of 0-10 where 10 is extremely likely and 0 is not at all likely

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	0 – not at all likely		
2	1	-	
3	2	-	
4	3	-	
5	4	-	
6	5		
7	6		
8	7		
9	8		
10	9		
11	10 – extremely likely		
85	Don't know *(do not read out)*	-	

Questionnaire

INFO3.

Base: All respondents in England (Code 1 or 4-24 at Q01)

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

Q015.

Base: All respondents in England (Code 1 or 4-24 at Q01)

Were you aware of this prior to this survey?

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know *(do not read out)*	-	

Q016.

Base: All code 1 (yes) at Q15

Since this change, has your organisation…

INT: Read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Chosen a new supplier and switched to a new supplier	-	
2	Not switched, but negotiated a better price or service contract with your existing service provider	-	
3	Looked for information about the water market and the choices available but have decided not to switch or renegotiate		
4	Looked for information and the choices available and have not yet decided		
5	Tried to switch but the switch was cancelled		
6	Taken no action to find out about the market or choices available		
85	Don't know *(do not read out)*	-	

Q017.

Base: All code 1 at Q16

Can I just double check that your organisation chose a supplier to switch to?

IF NECESSARY: if you are billed by a company which is relatively new to you, but you did not choose this company, then your account has been transferred to a retail water company - who now send bills, provide customer services and read water meters.

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes (we chose a supplier to switch to)	-	
2	No (we didn't choose a supplier to switch to)	RE-CODE TO CODE 6 AT Q16	
85	Don't know / not sure (if we chose a supplier to switch to) *(do not read out)*	-	

Q018.

Base: All respondents

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

INT: Code one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Advanced Demand Side Management (ADSM)		
2	Affinity for Business (Retail)		
3	**Affinity Water**		
4	Albion		
5	**Anglian Water (Hartlepool Water)**		
6	Anglian Water Business		
7	Bournemouth Water Business		
8	**Bristol Water**		
9	Business Stream		
10	Cambrian		
11	Cambridge Water		
12	Castle Water		
13	Cholderton		
14	Clear Business Water		
15	ConservAqua		
16	Dŵr Cymru (Welsh water)		
17	Everflow		
18	First Business Water		
19	Hafren Dyfrdwy		
20	Icosa Water Services		
21	Independent Water Networks (IWN)		
22	Kelda		
23	Olympos		
24	**Northumbrian Water Essex and Suffolk also**		
25	NWG Business (Retail)		
26	Pennon Water Services (Source for Business)		
27	**Portsmouth Water**		
28	Regent Utilities		
29	**Bournemouth Water**		
30	SES Business Water		
31	**Severn Trent Water**		
32	Smarta Water		
33	Source for Business (Pennon)		
34	**South East Water**		
35	**South Staffs Water**		
36	South Staffs Water Business (SSWB)		
37	**South West Water**		
38	South West Water Business		
39	**Southern Water**		
40	**SES Water (Sutton & East Surrey Water)**		
41	SES Business Water		
42	Smarta Water		
43	Source for Business		
44	SSE Water		
45	**Thames Water**		
46	Thames Water Commercial Services		
47	The Water Retail Company		
48	**United Utilities**		
49	Utility Bidder		
50	Veolia		
51	Water 2 Business		
52	Water Plus		
53	Waterscan		
54	Wave		
55	**Wessex Water**		
56	**Yorkshire Water**		
57	xu water		
58	We self-supply		ASK Q19
80	Other *(specify)*		OPEN
85	Don't know *(do not read out)*		

Questionnaire

DPCHECK
Base: ONLY SHOW IF CODE 2-6/85 AT Q16 AND NOT WELSH WATER OR HAFREN AND COMPANY AT Q01 DOESN'T MATCH COMPANY AT Q18 AS PER TABLE BELOW.

You said that your retail water company – the company that **bills** your business for water and sewerage services, provides customer services and reads any water meters – is [INSERT ANSWER FROM Q18]. Unless you have switched your retail supplier, your retail supplier should be [INSERT CORRESPONDING RETAIL COMPANY FROM LIST BELOW]. Does this sound right?

INT: Code one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes	REVERT BACK TO Q18 AND AUTO RECODE	
2	No	CONTINUE	
85	Don't know *(do not read out)*		

Q01	Q18
Anglian Water	Anglian Water Business
Northumbrian Water	NWG Business
Severn Trent	Water Plus
South West Water	Source for Business
Southern Water	Business Stream
Thames Water	Castle Water
United Utilities	Water Plus
Wessex Water	Water2Business
Yorkshire Water	Business Stream
Bournemouth Water	Source for Business
Bristol Water	Water2Business
Cambridge Water	SSWB
Essex & Suffolk Water	NWG Business
Hartlepool Water	Anglian Water Business
Portsmouth Water	Castle Water
South East Water	South East Water Choice
South Staffs Water	SSWB
SES Water	SES Business Water
Affinity Water (Central)	Affinity for Business
Affinity Water (East)	Affinity for Business
Affinity Water (Southeast)	Affinity for Business

Q019.
Base: All code 58 at Q18
Could I just check your company name that you're self-supplied under?

INT: Do not read out. Code one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	BT		
2	Greene King		
3	Marstons		
4	Whitbread		
5	Stonegate Pub Company		
6	Independent Water Networks		
7	Nottingham City Council		
8	John Lewis PLC		
9	Blackpool Borough Council		
10	Berendsen UK Ltd		
11	Heineken UK Ltd		
84	None of these *(do not read out)*		

Q020.
Base: All code 58 at Q18
Since becoming self-supplied, how satisfied or dissatisfied are you with how this works?

INT: Read out. Code one only

SINGLE RESPONSE. AFTER THIS QUESTION THANK & CLOSE FOR THOSE WHO CODE 50 AT Q18.

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know *(do not read out)*		

Q021.
Base: All code 1 at Q17
Overall, how satisfied or dissatisfied were you with the switching process?

INT: Read out. Code one only

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know *(do not read out)*		

Q022.
Base: All who disagree (codes 4/5) at Q21
Why were you dissatisfied with the switching process?
INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Took too long		
2	New account details are wrong – name, payments etc.		
3	Closing bill inaccurate – estimated meter reading		
4	Meter details are incorrect		
5	Getting two bills for one meter		
6	Errors in contract		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Questionnaire

Q023.
Base: All who have not switched (codes 2-6) at Q16
Could you tell me the main reason you have chosen not to switch?
INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Too busy/not enough time/not a priority at the moment		
2	Happy with current provider/don't want to switch		
3	Not a big difference in price/quality		
4	Not interested/haven't thought about it		
5	No other providers available		
6	Don't know much about it		
7	Haven't had the business for that long		
8	I am looking into switching		
9	Only use a small amount of water/only a small bill		
10	Bad experiences of other water retailer(s)		
11	Only just found out about the ability switch		
12	Other retailers are too expensive		
13	No knowledge of other retailers/don't know who to switch to		
14	Not my responsibility/other person deals with bill		
15	It automatically switched/I had no choice		
16	The terms (including small print) were not in-line with what we'd expected		
17	Couldn't get enough clear information to base a decision on		
17	No real reason		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q024.
Base: All respondents in England
What percentage level of saving on your water and sewerage charges [IF NOT CODE 1 AT Q17: would prompt] / [IF CODE 1 AT Q17: prompted] your business to switch service provider?

OPEN RESPONSE. NUMERIC: MIN 0, MAX 100

Code	Answer list	Scripting notes	Routing
1	Nothing (I won't switch)	ONLY SHOW IF NOT CODE 1 AT Q17	
2	We wouldn't switch for saving, a switch would only be determined by service	ONLY SHOW IF NOT CODE 1 AT Q17	
85	Don't know *(do not read out)*		

Q025.
Base: All respondents in England
How likely or unlikely is your organisation to do each of the following in the next 6 months...

INTERVIEWER: Read out each statement, tick one response for each statement.

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Very likely	-	
2	Quite likely	-	
3	Neither likely nor unlikely	-	
4	Quite unlikely	-	
5	Very unlikely		
6	Our contract doesn't expire in the next 6 months and we're unable to switch until it expires	Only allow this response for statement 1	
7	Our contract doesn't expire in the next 6 months and we're unable to renegotiate until it expires	Only allow this response for statement 2	
85	Don't know *(do not read out)*	-	

Statement number	Statement	Scripting notes	Routing
1	Choose a new supplier and switch [IF CODE 1 AT Q17: again]?		
2	Negotiate a better price or service contract with your existing service provider		
3	Look for information about the water market and the choices available		

INFO4.
Base: All respondents
The next few questions are about the company that provides billing, meter reading and customer service at your site

Q026.
Base: All respondents
How much do you agree or disagree that your retailer, [UNLESS CODE 2 AT DP CHECK: INSERT PROVDER FROM Q18], cares about the service it gives you?

INT: Read out. Code one only

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know *(do not read out)*		

Q027.
Base: All respondents
How much do you agree or disagree that your bills are clear and easy to understand?

INT: Read out. Code one only

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know *(do not read out)*		

Questionnaire

Q028.
Base: All respondents
How satisfied or dissatisfied are you with [UNLESS CODE 2 AT DP CHECK: INSERT PROVDER FROM Q18] services?
INT: Read out. Code one only

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know *(do not read out)*		

Q029.
Base: All who disagree (codes 2-5) at Q28
Why are you dissatisfied?

INT: Do not read out, tick all that apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Cost/prices have risen		
2	Bills generally too expensive		
3	Poor/inefficient service/issues not resolved		
4	Bill inaccurate		
5	Problems after account transferred		
6	Water meter issues/problems		
7	Meter readings wrong / not taken		
8	No access to water meter i.e. water meter has been blocked off etc.		
9	Can't get through on the phone		
10	Delay in responding to query		
11	Not taking ownership of problems		
12	Not sure who to contact anymore		
13	Can't / don't have an account manager		
14	Poor customer service		
15	Need more clarity/information about service		
16	Price of service i.e. too expensive/price has been increased etc.		

17	They should have made it clear who they are/account transferred		
18	They didn't offer a long enough payment holiday during COVID-19		
19	Their general response to COVID-19 was not good enough		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q030.
Base: All respondents
How much do you trust [UNLESS CODE 2 AT DP CHECK: INSERT PROVDER FROM Q18]? Please give a score on a scale of 1-10, where 10 means that you trust them completely and 1 means that you don't trust them at all?

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	1 – don't trust them at all	-	
2	2	-	
3	3	-	
4	4	-	
5	5		
6	6		
7	7		
8	8		
9	9		
10	10 – completely trust them		
85	Don't know *(do not read out)*	-	

Q031.
Base: All respondents
How likely would you be to recommend [UNLESS CODE 2 AT DP CHECK: INSERT PROVDER FROM Q18] to others? Please answer on a scale of 0-10, where 10 is extremely likely and 0 is not at all likely

INT: Do not read out, tick one only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	0 – not at all likely		
2	1	-	
3	2	-	
4	3	-	
5	4	-	
6	5		
7	6		
8	7		
9	8		
10	9		
11	10 – extremely likely		
85	Don't know *(do not read out)*	-	

QW02.
Base: All respondents in Wales
Are you aware of any difference in market arrangements for business customers in Wales and for those in England?

INTERVIEWER: Do not read out.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes (specify)	OPEN	
2	No	-	
85	Don't know *(do not read out)*	-	

INFO5W. All respondents in Wales

In Wales, businesses which use more than 50,000 cubic metres (m3) of water a year can switch their retail service provider like they can in energy.

Questionnaire

QW01.
Base: All respondents in Wales
Were you aware of this prior to the survey?

INTERVIEWER: Do not read out.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know *(do not read out)*	-	

INFO5.
Base: All respondents
The final set of questions are about any contacts you might have had with your water service provider, sewerage service provider or your retail service provider in the past 12 months.

Q032.
Base: All respondents
In the past 12 months have you contacted any of the following with an enquiry or complaint?

INTERVIEWER: Read out each statement, tick one response for each statement.

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know *(do not read out)*	-	

Statement number	Statement	Scripting notes	Routing
1	Your water services supplier, [INSERT PROVIDER FROM Q1]		
2	Your sewerage and drainage supplier, [INSERT PROVIDER FROM Q2]		
3	Your retail provider (the company that sends your bills), [UNLESS CODE 2 AT DP CHECK: INSERT PROVIDER] from Q18		

Q033.
Base: All respondents who code 1 yes to more than one provider at Q32
You have contacted more than one provider in the past 12 months, were these contacts about separate issues, or were they all relating to the same thing?

INT: Read out. Code one only

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Separate issues		
2	The same thing		
85	Don't know *(do not read out)*		

Q034.
Base: All respondents who have contacted a provider in the last 12 months, code 1 (yes) at Q32 for at least one provider. If code 2 (the same thing) at Q33 ask once for all providers. If code 1 (separate issues) ask separately for each provider contacted
What did you contact [INSERT PROVIDER CONTACTED FROM Q32] about?

INT: Do not read out, tick all that apply.

REPEAT FOR EACH PROVIDER CONTACTED. MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	A general Billing enquiry		
2	To report a leak		
3	Sewerage problem		
4	Loss of supply after icy weather		
5	Issue with water meter		
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	A billing enquiry related to Covid-19		
80	Other *(Specify)*	OPEN	
85	Don't know *(do not read out)*	EXCLUSIVE	

Q035.
Base: All respondents who have contacted a provider in the past 12 months, code 1 yes at Q32
Overall, how satisfied or dissatisfied were you with the contact with...

INT: Read out. Code one only

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know *(do not read out)*		

Statement number	Statement	Scripting notes	Routing
1	Your water services supplier, [INSERT PROVIDER FROM Q1]	ONLY SHOW IF CODE 1 YES AT Q32	
2	Your sewerage and drainage supplier, [INSERT PROVIDER FROM Q2]	ONLY SHOW IF CODE 1 YES AT Q32	
3	Your retail provider (the company that sends your bills), [INSERT PROVIDER] from Q18	ONLY SHOW IF CODE 1 YES AT Q32	

Questionnaire

Q036.

Base: All respondents who have contacted a provider in the past 12 months, code 1 yes at Q32

Overall, how satisfied or dissatisfied were you with the following aspects of your contact with [INSERT PROVIDERS CONTACTED]

INT: Read out. Code one only

SINGLE GRID, RANDOMISE STATEMENTS. REPEAT FOR EACH PROVIDER CONTACTED AT Q32

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know *(do not read out)*		

Statement number	Statement	Scripting notes	Routing
1	The ease of contacting someone who was able to help you		
2	The quality or clarity of information provided		
3	The knowledge and professionalism of staff		
4	The feeling that your query had been, or would be, resolved		
5	The way that you were kept informed of progress with your enquiry (and /or) claim		
6	The speed with which your query was resolved		

Covid-19 response

Q037.

Base: All respondents

Since the UK went into lockdown on 23rd March 2020, has your water retailer contacted you to offer any support or information, relating to billing arrangements?

INTERVIEWER: Do not read out.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No	-	
85	Don't know *(do not read out)*	-	

Q038.

Base: All respondents

Which of the following statements best reflects your organisation's future outlook with regards to Covid-19?

INTERVIEWER: Read out.

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Covid-19 has had a minimal effect on our business, and we are continuing to plan as normal		
2	Covid-19 had an effect on our business during lockdown, but we are planning for the future as normal	-	
3	Covid-19 has had a severe effect on our business and we are having to re-evaluate our plans for the future		
86	Prefer not to say		
85	Don't know *(do not read out)*	-	

CLOSE

C01.

Base: All respondents

Would it be OK if DJS Research re-contacted you if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes **(VERIFY CONTACT DETAILS)**	-	
2	No	-	
85	Don't know *(do not read out)*	-	

C02.

Base: All respondents

Would you be willing to be contacted for future research about your experiences of water and sewerage on behalf of the Consumer Council for Water (CCW)? (By agreeing to this, you would be consenting for your details to be passed to CCW who might then pass them on to another research provider)

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes **(RECORD CONTACT DETAILS)**	-	
2	No	-	
85	Don't know *(do not read out)*	-	

C03.

Base: All respondents

Our client, CCW, would like to be able to hear the feedback of businesses in relation to this matter. Would you consent to a recording of our call to be forwarded to CCW? There would be strictly no follow up from this, and the call and your details will not be shared with anyone

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know *(do not read out)*	-	

For more information

Alex McCluckie, Research Director
amccluckie@djsresearch.com

Matt Prince, Senior Research Manager
mprince@djsresearch.com

Head office: 3 Pavilion Lane, Strines, Stockport, Cheshire, SK6 7GH

Leeds office: 2 St. David's Court, David Street, Leeds, LS11 5QA

+44 (0)1663 767 857
djsresearch.co.uk

Follow us on LinkedIn...

For free market research findings and our latest news and developments: linkedin.com/company/djs-research-ltd

For regularly updated market research findings from your sector, please have a look at our complimentary insights: djsresearch.co.uk/blog/articles