

SME customers' preferences for meter reading frequencies

Summary report

August 2021

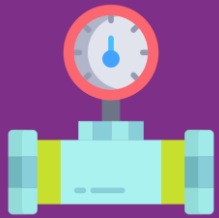


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Responsibility and importance of meter reads

- Most respondents have a level of responsibility for managing and paying the utility bills in their organisation (92%). Those in small (32%*) and micro (26%) businesses are more likely to only have 'some' rather than 'sole' responsibility.
- A majority (88%) believe it is important that their water and sewerage bills are based on meter reads rather than estimates, rising to 90% for micro businesses.
- Medium businesses are significantly more likely to believe bills based on meter reads are important (96%*) compared to small businesses (82%**).
- Sole traders are more likely to state they do not pay their bills by metered charges (50% vs. 32%). This suggests that many in this group may not be eligible for the non-household retail market due to not having business premises.
- Over half of businesses (58%) state meter reads are important as it is believed as the fairest way of paying, closely followed by wanting to be charged for what they use (55%).



Meter reading method and frequency

- Over half of businesses (58%) have their water meter read by the retailer, compared to 3 in 10 who send the reads themselves (29%). Micro businesses are significantly more likely to experience a mixture of both (14%*), however 59% still have their water meter read by the retailer.
- Smaller businesses are slightly more likely to have the meter read by the retailer than larger.
- Most have their water meter read/send meter reads every 1-3 months (36%), while small businesses are significantly more likely to do so in this time frame (53%).
- Around a third (35%) of micro businesses have their meter read/send meter reads every 4-6 months.
- Most respondents are happy with their current frequency of meter reads (63%), with sole traders significantly happier (76%*).
- Only 5%* of micro businesses are more likely to want less frequent meter reads compared to small businesses (13%*).
- Of those who would like more frequent meter reads many state that it helps them manage their bills (49%) and is the fairest way of paying (48%) as the two key reasons.



Unexpectedly high bills / catchup bills

- Around two thirds (68%) have not received an unexpectedly high bill compared to around a quarter (28%) who have.
- Medium sized businesses are significantly more likely to have received an unexpectedly high bill (46%*).
- Of those who have, a majority stated their retailer helped them manage the bill (82%), predominantly through spreading the payments (51%), a leakage allowance (35%) or another way (5%).

Overview



Online survey of 500 SMEs in England, director level or above.



Fieldwork conducted 5th-7th July 2021



Not all businesses in the sample are eligible for the non-household retail market due to not having business premises, instead these findings are indicative, highlighting broad patterns by business size.

Approach


CCW commissioned Yonder to undertake an online business omnibus survey in England.

Yonder own and manage a highly engaged online panel of 500 businesses with directors or above in Small and Medium Sized Enterprises, with over 400 of individuals identified as decision makers or influencers when it comes to choosing utilities within the business.

Yonder conducted 447 online interviews with businesses. The second question in the survey identified whether a company pays for their water and sewerage bill based on metered charges. Those who selected 'no' or 'don't know' were screened out, leaving a sample of 280 throughout the rest of the survey.

Sampling**

Quotas were set on company size as follows. No weighting was applied to the data after fieldwork was completed.



Sole Trader (169)	38%
Micro (119)	27%
Small (65*)	15%
Medium (94*)	21%

This report uses both statistical differences (at 95% confidence) against a total level and comparing against subgroups.

↑↓ Significantly higher / lower than the **total** at 95%

↑↓ Significantly higher / lower against **subgroups** at 95%

**In some instances, figures may round off 1% higher/lower than 100% due to the creation of NET percentages. Likewise, some percentages are over 100% due to multi-choice options.

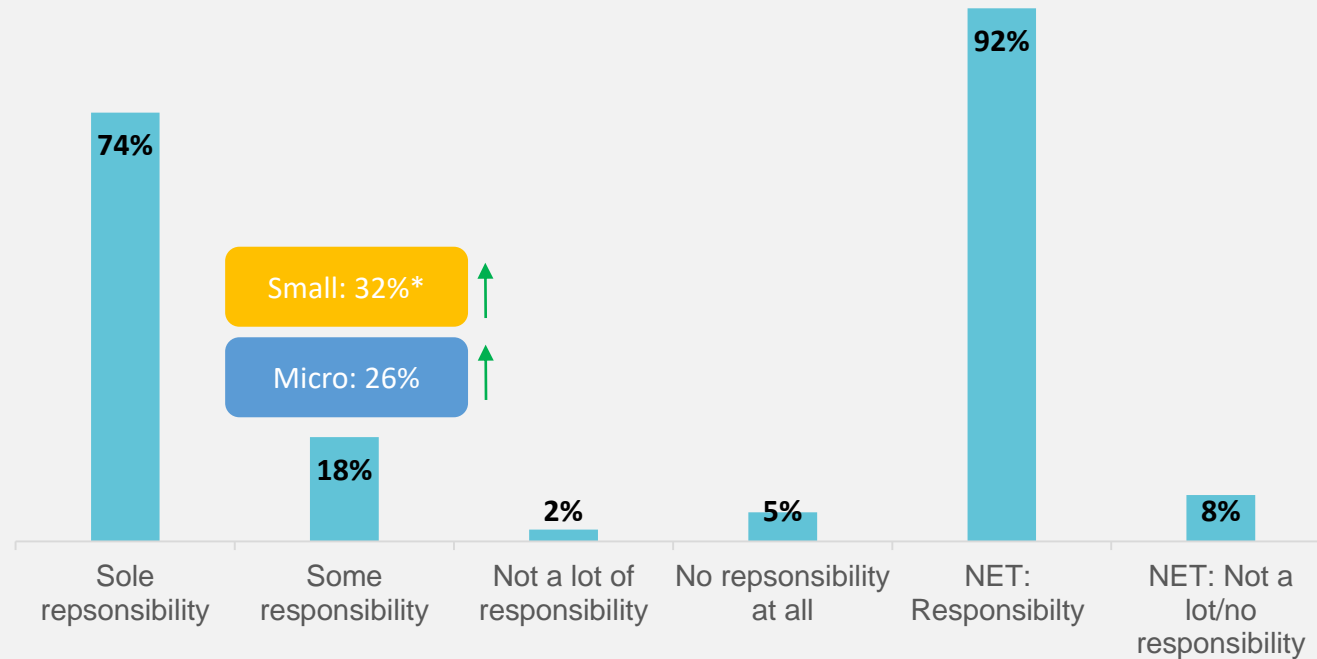
*Base size is less than 100 and should be viewed indicatively only.

Most respondents have a level of responsibility for managing and paying the utility bills in their organisation (92%). Meanwhile, those in micro and small businesses are more likely to have 'some responsibility'



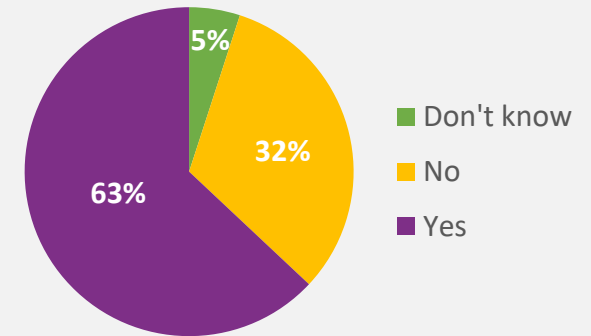
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Level of responsibility

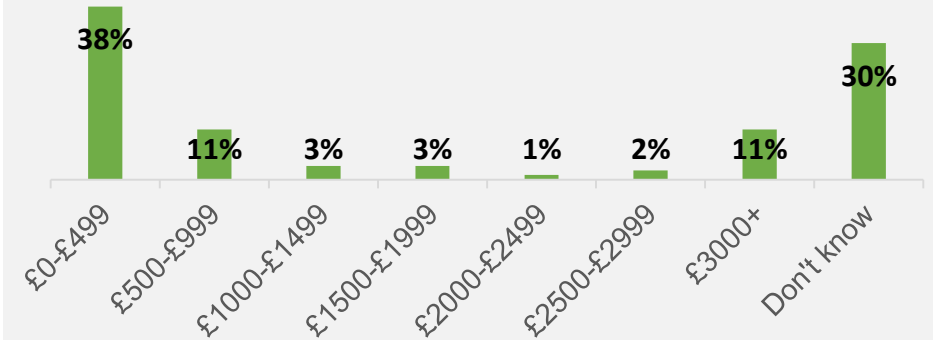


↑↓ Significantly higher / lower than the total at 95%

Pay bills based on metered changes



Approximately how much per year?



Q1. How much responsibility, if any, do you have for managing and paying the utilities bills for your organisation?
Base: All respondents (447), Micro (199) and Small (65*)

Q2. Does your company currently pay their water and sewerage bill based on metered changes?
Base: All respondents (447)

Q3. Thinking of a typical bill, before the Covid-19 pandemic, approximately how much do you pay each year for your water and sewerage services?
Base: All respondents whose company currently pay their water and sewerage bill based on metered changes (280)

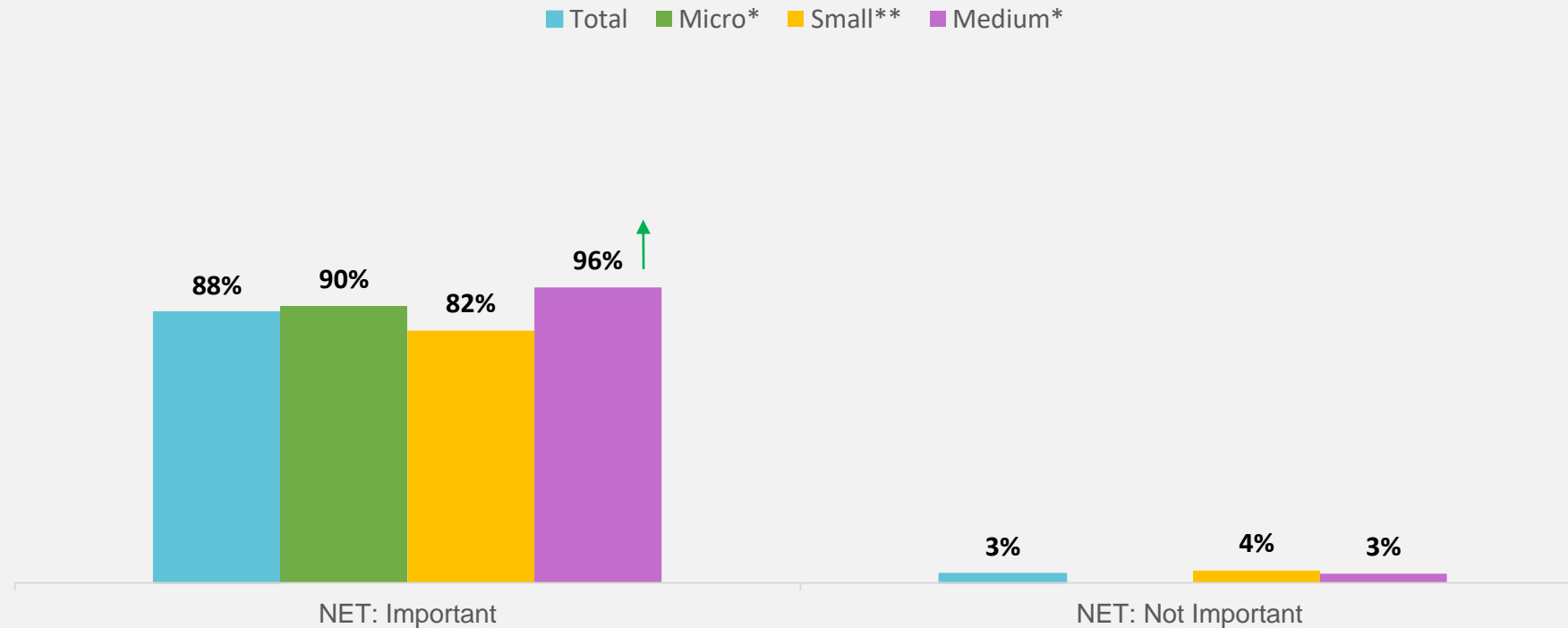
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A majority (88%) believe it is important that their water and sewerage bills is based of meter reads rather than estimates. While medium sized businesses are more likely to state that it is important



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How important based on meter reads?



↑↓ Significantly higher / lower than the total at 95%

Q4. How important, if at all, is it that your water and sewerage bill is based on meter reads (water usage) rather than estimates?

Base: All respondents who pay for their water and sewerage bill based on metered charges (280)

**Base size is less than 50 and significant differences cannot be made.

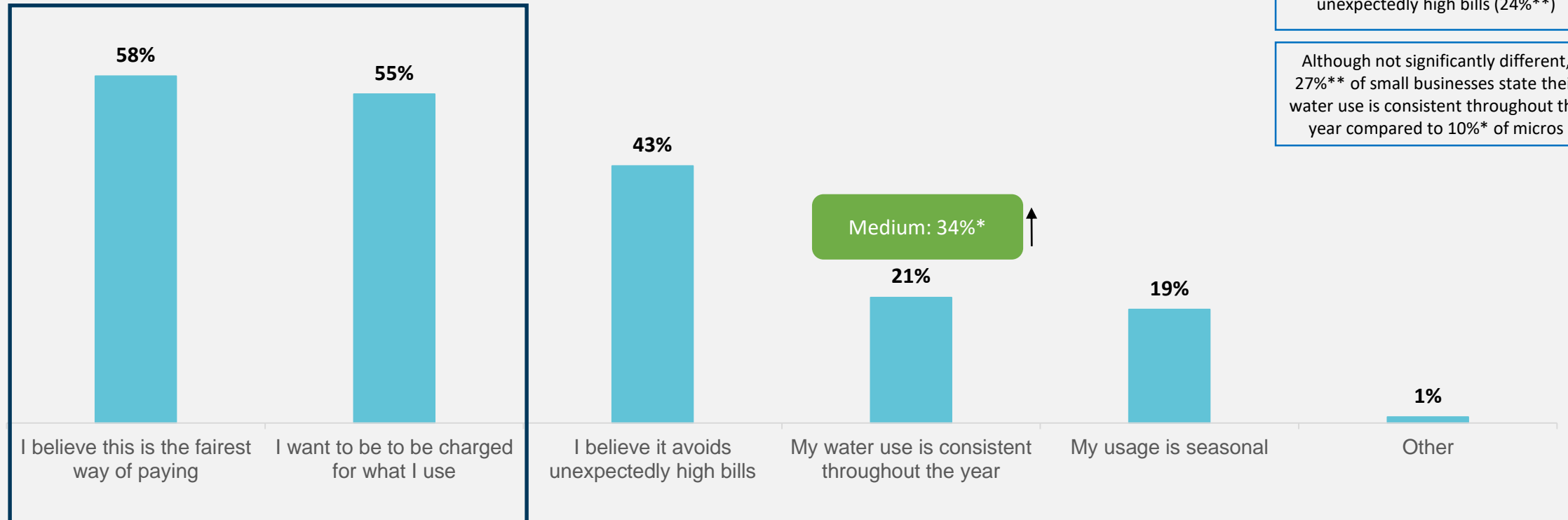
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Over half of businesses (58%) feel that meter reads are important, believing this is the fairest way of paying closely followed by wanting to be charged for what they use (55%)



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Why is it important?



While not significant, small businesses are less likely to believe it avoids unexpectedly high bills (24%**)

Although not significantly different, 27%** of small businesses state their water use is consistent throughout the year compared to 10%* of micros

Medium: 34%*

↑↓ Significantly higher / lower against subgroups at 95%

Q5. Why is it important that your water bill is based on meter reads (water usage) rather than estimates? (Multi-choice)
Base: All respondents who find it important that their water and sewerage bill is based on meter reads (water usage) rather than estimates (246), Micro (72*), Small (37**) and Medium (77*)

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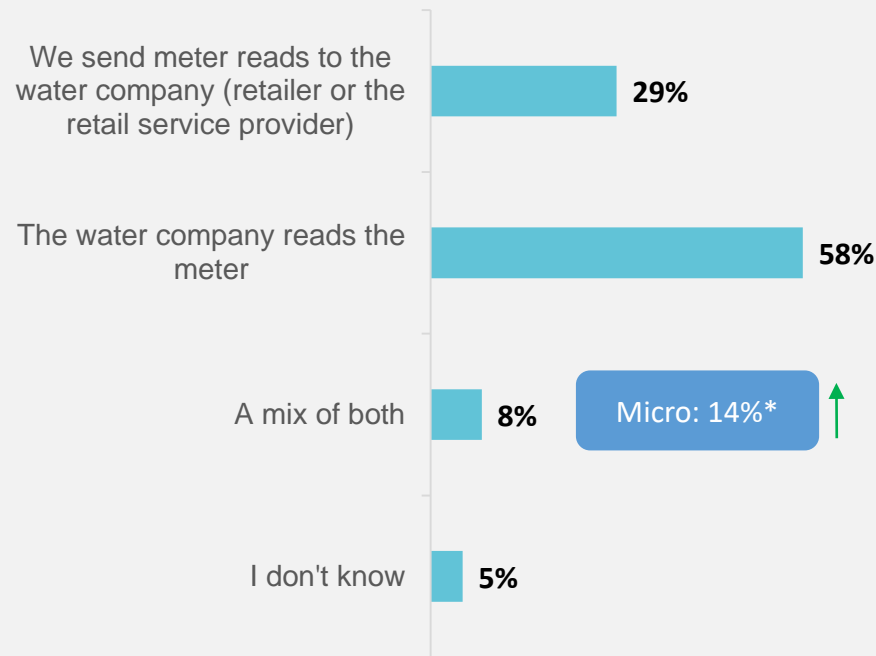
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Over half have their water meter read by the retailer (58%) compared to 3 in 10 who send the details (29%), while micro businesses are more likely to experience a mixture of both (14%). Most have their water meter read/send meter reads every 1-3 months



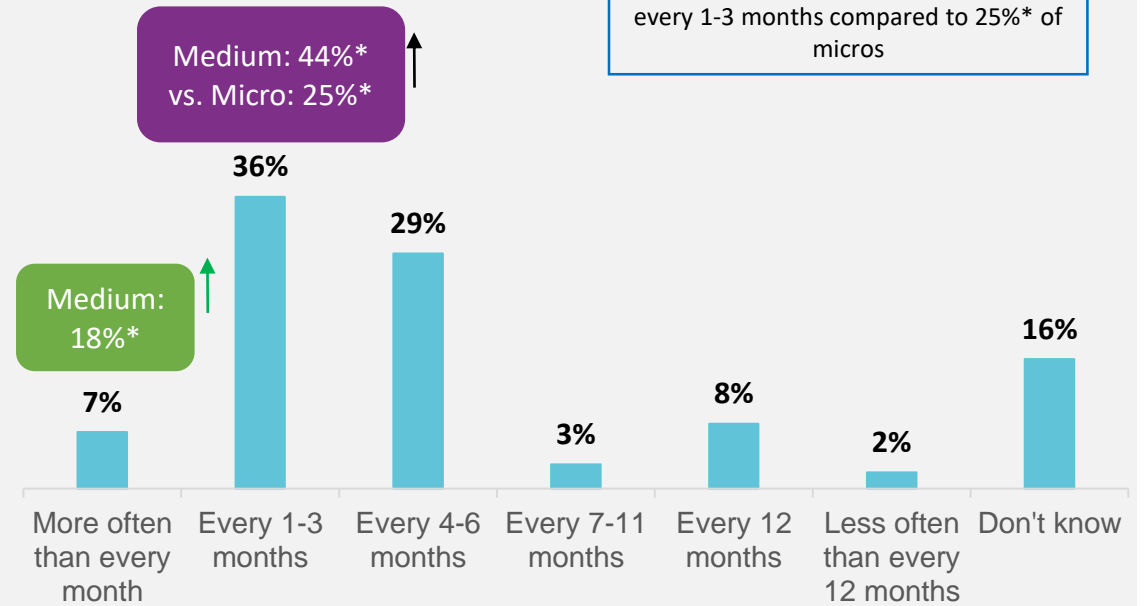
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Who reads your water meter?



↑↓ Significantly higher / lower than the total at 95%

Frequency of meter reads



Although not significantly different to other businesses, 35%* of micros have meter readings every 4-6 months

While not significantly different, 53%** of small businesses have meter readings every 1-3 months compared to 25%* of micros

↑↓ Significantly higher / lower against subgroups at 95%

Base: All respondents who find it important that their water and sewerage bill is based on meter reads (water usage) rather than estimates (280) and Micro (80*)

Q6. Who reads your water meter?
Q7. How often do you currently have your water meter read/send meter reads?

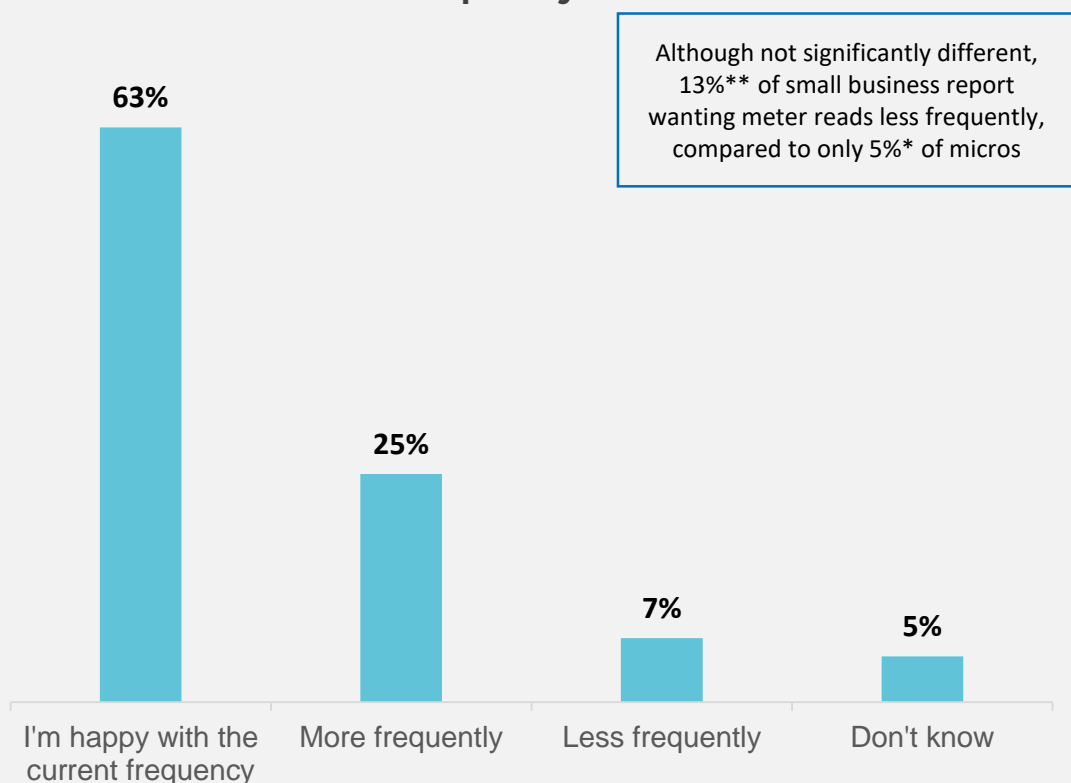
Base: All respondents who find it important that their water and sewerage bill is based on meter reads (water usage) rather than estimates (280), Micro (80*), Small (45*) and Medium (80*)

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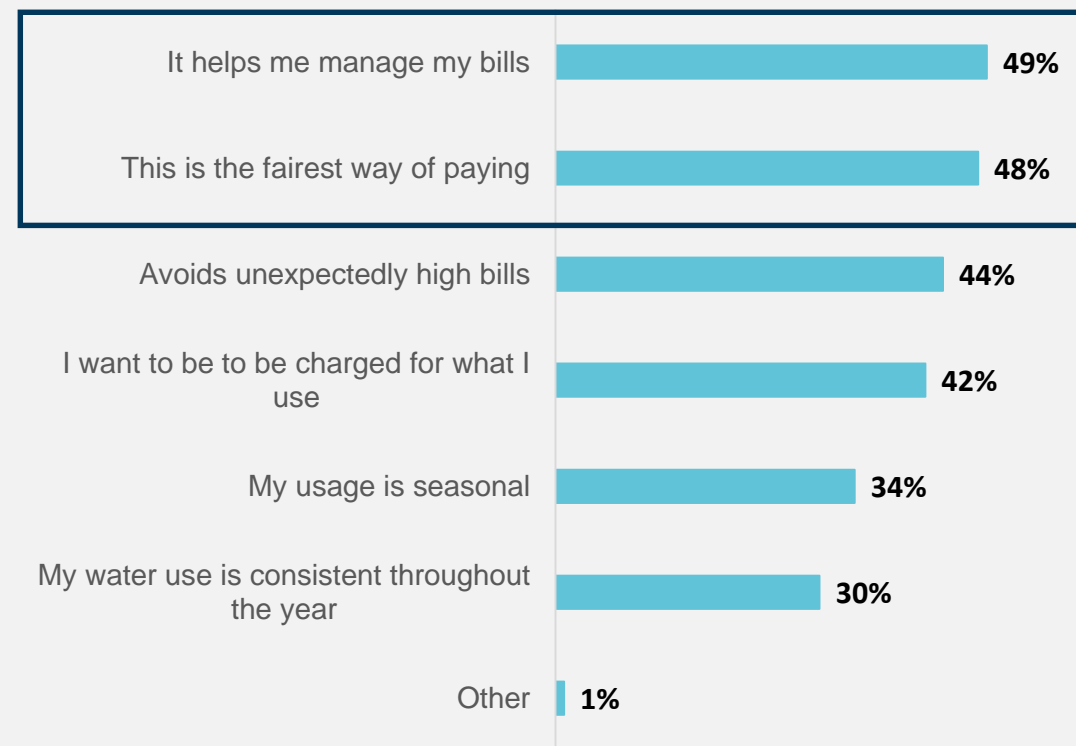
Most respondents are happy with their current frequency of meter reads (63%), though 7% want less frequent reads. Only 5%* of micro businesses want less frequent meter reads compared to 13%** of small businesses

Meter reads more or less frequently?



Although not significantly different, 13%** of small business report wanting meter reads less frequently, compared to only 5%* of micros

Why would you prefer meter reads more frequently?*



Q8. Would you prefer to have your meter read / send meter reads more or less frequently?
Base: All respondents who find it important that their water and sewerage bill is based on meter reads (water usage) rather than estimates (280), Micro (80*) and Small (45**)

Q9. Why would you prefer to have your meter read / send meter reads more frequently?
Base: All respondents who would prefer to have their meter read / send meter reads more frequently (71*)

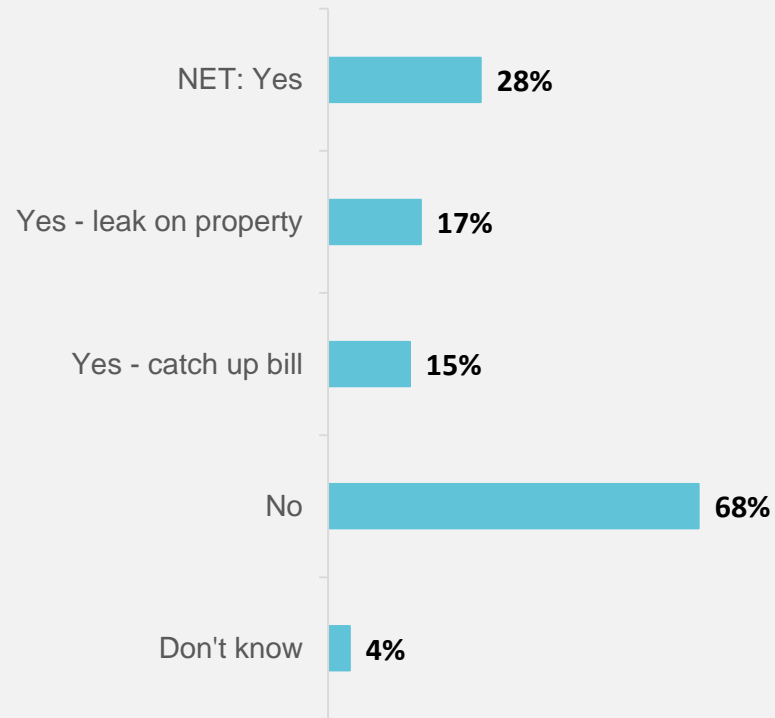
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Around a quarter (28%) have received an unexpectedly high bill compared to thirds (68%) who have not. Of those who have, a majority stated their water retailer helped them manage the bill (82%)

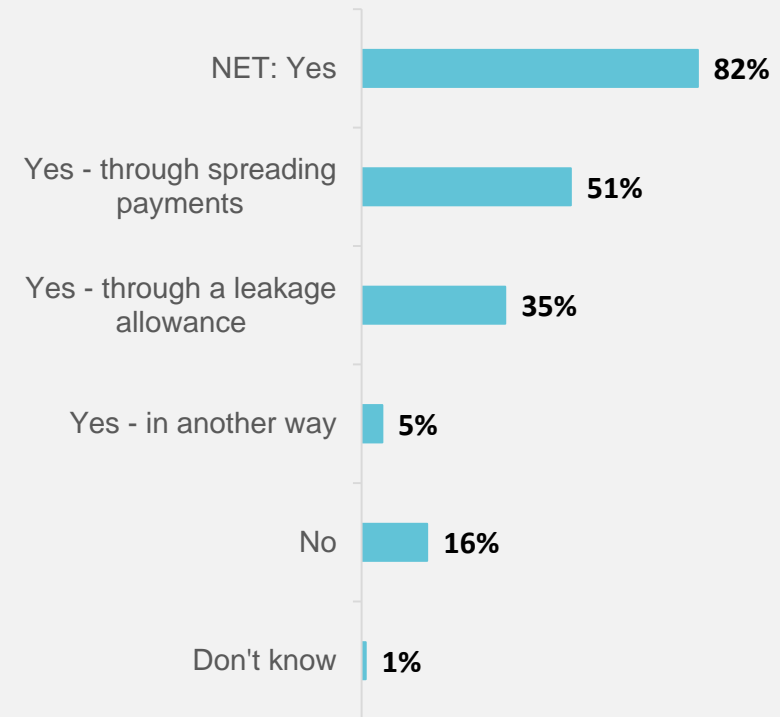


Have you received an unexpectedly high bill?



↑↓ Significantly higher / lower than the total at 95%

Did the water retailer help?*



Q10. Have you ever received an unexpectedly high bill due to a leak on the property or a catch-up bill to correct an inaccuracy with a previous bill?

Base: All respondents whose company currently pay their water and sewerage bill based on metered charges (280)

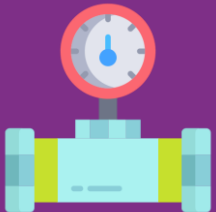
Q11. Did the water company help you to manage the increase in the bill?

Base: All respondents received an unexpectedly high bill due to a leak on the property or a catch up bill to correct an inaccuracy with a previous bill (79*)

*Base size is less than 100 and should be viewed indicatively only.

Appendix





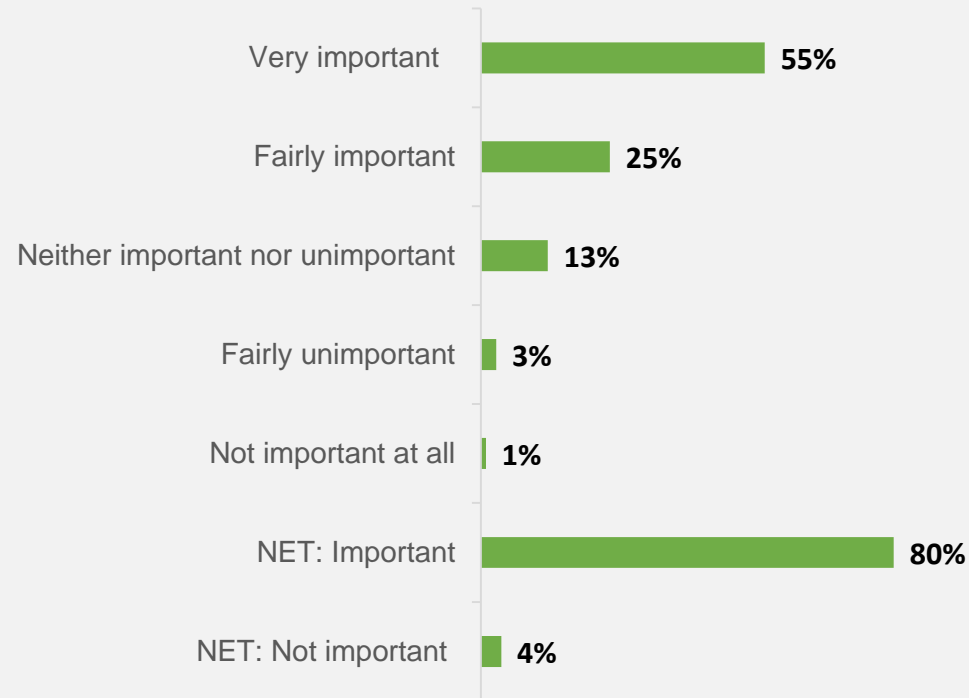
- Sole traders are often not eligible for the non-household retail market due to not having business premises, instead the findings should be taken as indicative, highlighting broad patterns by business size.
- Findings from sole traders are also included in the total percentages used within the main report.
- Unsurprisingly, sole traders are more likely to have sole responsibility of managing and paying for their utility bills (90%).
- Sole traders are more likely to state they do not pay their bills by metered changes (50%) highlighting those who may not be eligible for non-household retail market due to not having business premises.
- Around two-thirds (67%*) of sole traders have their meter read by their service provider.
- While significantly more in this group do not know how often their reading is taken (32%*)

Four-fifths (80%) of sole traders believe bills based on meter reads rather than estimates is important, with around two-thirds (67%) stating this is because they want to be charged for what they use

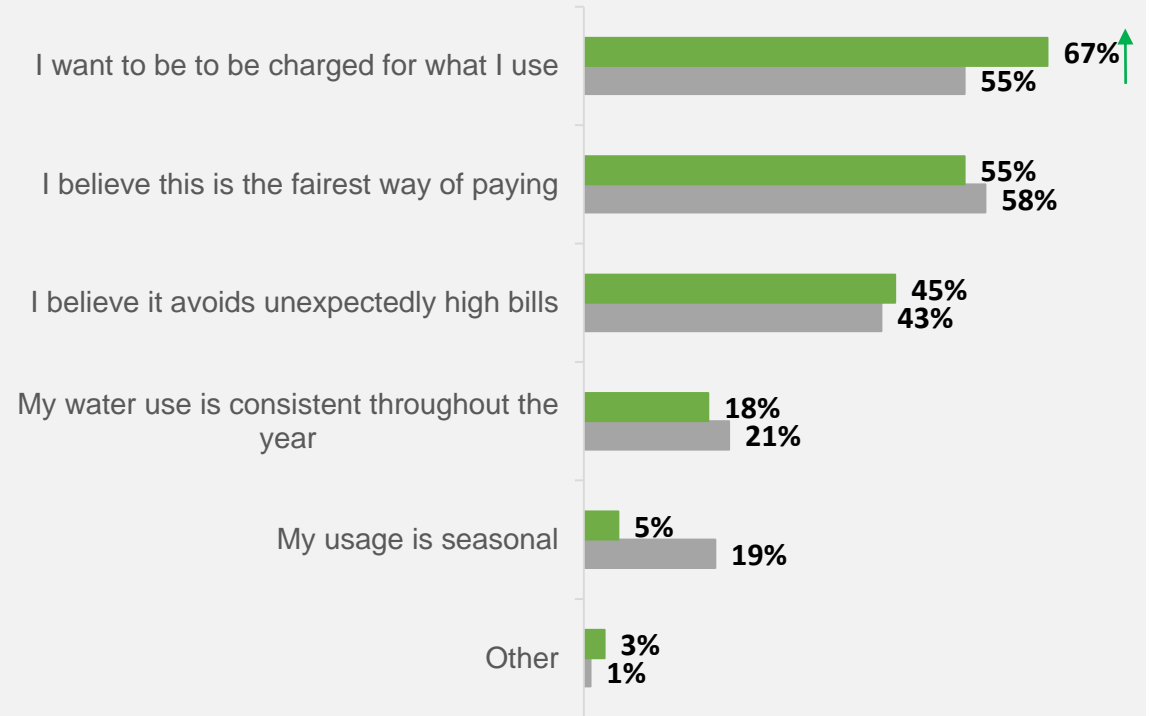


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Important that their bill is based on meter reads



Why is it important?



↑ ↓ Significantly higher / lower than the total at 95%

■ Sole Traders* ■ Total

Q4. How important, if at all, is it that your water and sewerage bill is based on meter reads (water usage) rather than estimates?

Base: All sole traders whose company currently pay their water and sewerage bill based on metered changes (75*)

Q5. Why is it important that your water bill is based on meter reads (water usage) rather than estimates? (Multi-choice)

Base: All sole traders who find it important that their water and sewerage bill is based on meter reads (water usage) rather than estimates (60*)

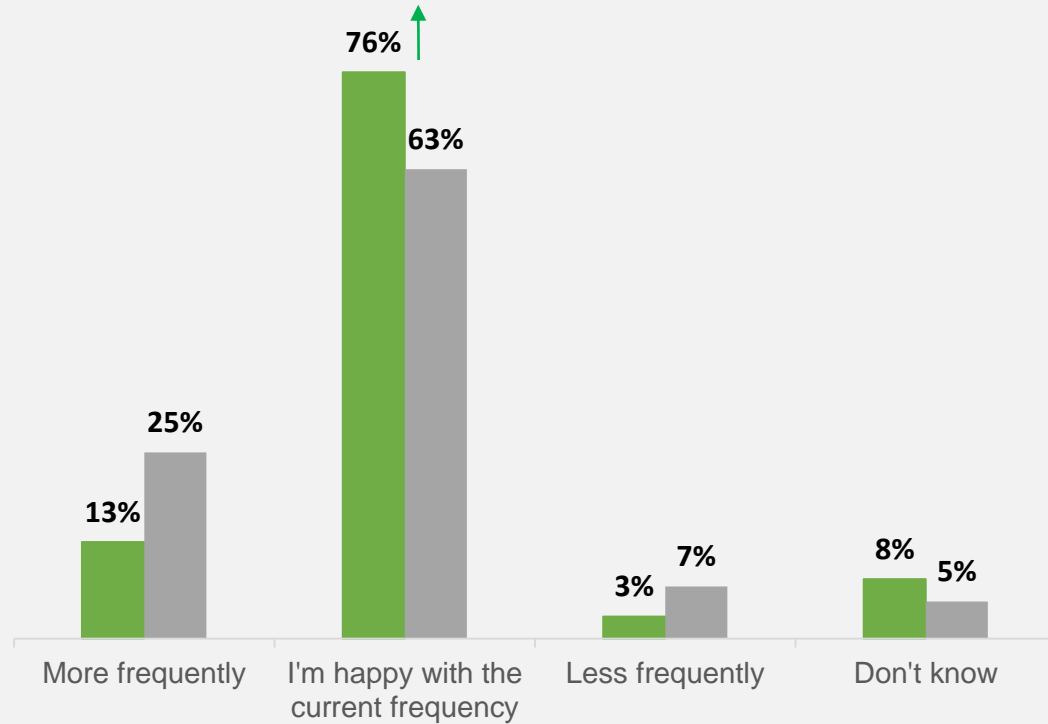
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Significantly more sole traders (76%) are happy with the current frequency of their meter reads compared to the total of those surveyed and have not received an unexpectedly high bill compared to the total of those surveyed (88%)



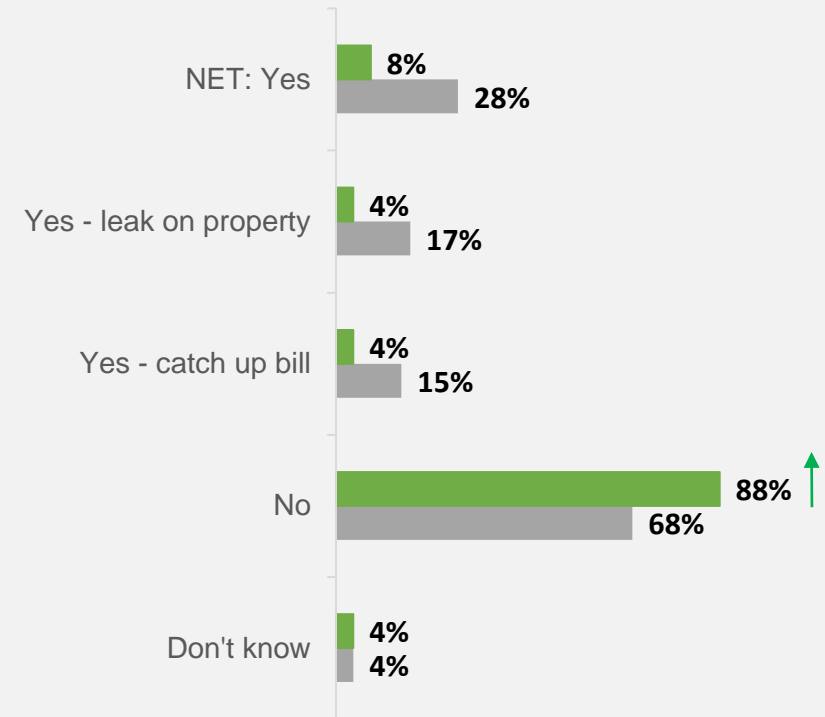
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Meter reads more or less frequently?



↑↓ Significantly higher / lower than the total at 95%
 ■ Sole Traders* ■ Total

Have you received an unexpectedly high bill?



Q8. Would you prefer to have your meter read / send meter reads more or less frequently?
 Base: All sole traders whose company currently pay their water and sewerage bill based on metered charges (75*)
 *Base size is less than 100 and should be viewed indicatively only.

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