Ofwat

Non-Household Customer Insight Surveys 2017/18

Final Report of Results

Opinion Research Services

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Ofwat

Non-Household Customer Insight Surveys 2017/18

Final Report
by Opinion Research Services

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This study was conducted in accordance with ISO 20252:2012

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1. Project Overview

Background

The Commission

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

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

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

1.4 In June 2017, Ofwat appointed Opinion Research Services (ORS) to undertake research in order to gain insight from customers about their experiences of the opening of the water market. It is hoped that the research findings will enable Ofwat to determine how effectively the market is functioning as well as understand the experiences of customers who have switched supplier.

1.5 The research comprised two main waves:

- Wave 1 – Representative of all eligible non-household customers.
- Wave 2 – Conducted with customers who have switched retailer.

1.6 Information about the two waves of the survey are detailed overleaf.

The Survey of all Eligible Non-household Customers (Wave 1)

1.7 The aim of the first wave of the quantitative survey was to gather views from a representative overview of all types and sizes of businesses, charities and public-sector organisations in England (and eligible high water users in Wales) and to investigate their experiences interacting with the newly opened market.

1.8 The survey was carried out by telephone over a twelve-week period between 1st September and 28th November 2017 and included questions on the following topics:

- Satisfaction with current supplier;
- Awareness of the changes to the water market;
- Whether they had switched/renegotiated with existing retailer/searched for information/ planned to in future;
- Experiences of searching information about, interacting with, & comparing other retailers;
- Experiences with third party intermediaries
- Experience of the switching/renegotiating process;
- Problems/complaints

1.9 A stratified sample was designed to ensure that differences between organisations of different sizes and in different sectors, and differences between water company regions could be measured. Quota controls were used to ensure a representative sample and 1,750 full interviews were achieved overall.

The Sample

1.10 The sample, consisted of registered businesses, charities and public-sector organisations based wholly or mainly in England. It was selected from data purchased from Dun & Bradstreet, a commercial source of business contacts. Additional contacts were sourced from Dŵr Cymru, which provided a list of all eligible organisations in Wales (using 50,000,000 litres or more a year).

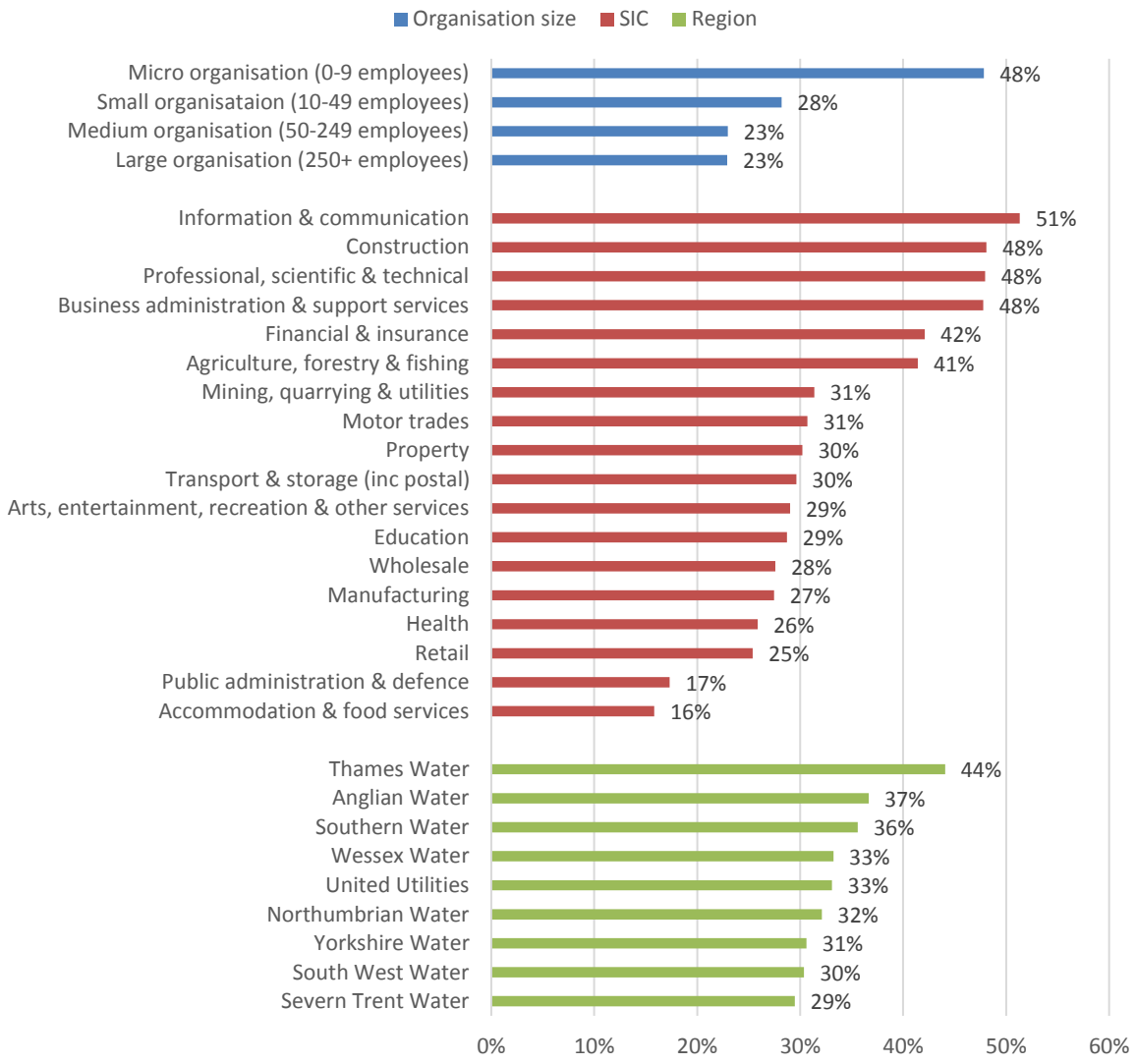
Organisation Eligibility

1.11 Owing to a decision made by the Welsh Government, customers who receive their water and waste water retail services from Dŵr Cymru (Welsh Water) or the area that was formerly Dee Valley Water (based mainly or wholly in Wales) will only be able to switch if they use 50 million litres of water a year at their property. These eligible Welsh customers were identified with help from Dŵr Cymru for inclusion in the research. The first wave of the survey is therefore representative of all eligible non-household customers in England and Wales.

1.12 Not all businesses, charities and public-sector organisations are eligible to switch water and/or wastewater retail services supplier in the open market. The organisation must operate from a business premises, pay business rates, and not use a household water supply (i.e. those who run a business from their own home are not eligible). Further, some organisations that rent their business premises will do so with the utility services provided by the landlord, so they are not responsible for who supplies their water and/or wastewater retail services (along with other utilities) and aren't able to choose the supplier.

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

Figure A: Ineligibility of organisations in the sample



1.14 Almost half (48%) of all micro organisations included in the sample were not eligible (partly due to many being home based and not having a dedicated premises), but approaching a quarter (23%) of medium and large organisations were also not eligible (mainly as services were provided by the landlord).

1.15 The proportion of ineligible organisations in the sample was also higher in the Thames Water region (44%), due to 42% of small organisations, 40% of medium organisations and 38% of large organisations) being ineligible in this region. This is partly due to the type of organisations in the area, though possibly also due to the prevalence of serviced offices in and around Greater London.

Weighting

1.16 The sample design aimed to achieve a roughly equal number of interviews in each region in order that comparisons could be made between experiences in each water regions. In actual fact, the number of organisations varies from just over 65,000 in the Northumbrian Water region to approaching 700,000 in the Thames Water region. Small (10-49), medium (50-249 employees) and large (250+ employees) organisations were also oversampled in order to draw meaningful comparisons between organisations sizes.

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

1.18 The profile tables below and overleaf show the differences between the weighted and un-weighted percentages.

Profile Tables

1.19 Full details of the profile characteristics of each organisation are shown in the tables below. Any value denoted by a * represents a percentage which is less than 1%.

Water Region	Population				Survey Responses		
	Total orgs	% eligible	Eligible organisations		Unweighted		Weighted
	Thousands		Thousands	%	Number	%	%
Anglian Water	245.4	48%	117.0	10%	191	11%	12%
Northumbrian Water	65.7	58%	38.1	3%	194	11%	3%
Southern Water	202.4	52%	105.5	9%	175	10%	8%
Severn Trent Water	310.9	58%	179.7	16%	198	11%	17%
South West Water	74.3	58%	43.3	4%	200	11%	4%
Thames Water	689.0	51%	348.9	31%	200	11%	28%
United Utilities	236.0	56%	133.0	12%	180	10%	12%
Wessex Water	119.9	51%	61.7	6%	188	11%	6%
Dŵr Cymru Welsh Water	<0.1	100%	<0.1	*%	25	1%	*%
Yorkshire Water	162.6	59%	96.4	9%	199	11%	9%
Total	**2,106.2**	**53%**	**1,123.6**	**100%**	**1,750**	**100%**	**100%**

Size of Organisation	Population				Survey Responses		
	Total orgs	% eligible	Eligible organisations		Unweighted		Weighted
	Thousands		Thousands	%	Number	Valid %	Valid %
Micro (1-9 employees)	1870.5	51%	958.5	85%	633	36%	85%
Small (10-49 employees)	193.8	69%	134.6	12%	485	28%	12%
Medium (50-249 employees)	33.7	73%	24.6	2%	364	21%	2%
Large (250+ employees)	8.2	73%	6.0	1%	259	15%	*%
Not known	-	-	-	-	9	-	-
Total	**2,106.2**	**53%**	**1,123.6**	**100%**	**1,750**	**100%**	**100%**

Type of Organisation	Population		Survey Responses		
	Total organisations		Unweighted		Weighted
	Thousands	%	Number	Valid %	Valid %
Agriculture, forestry & fishing	98.8	4%	42	2%	3%
Mining, quarrying & utilities	10.5	*%	19	1%	*%
Manufacturing	114.9	5%	249	14%	6%
Construction	261.5	12%	71	4%	9%
Motor trades	62.9	3%	64	4%	3%
Wholesale	92.1	4%	71	4%	4%
Retail	164.8	7%	187	11%	9%
Transport & storage (inc postal)	82.0	4%	53	3%	4%
Accommodation & food services	122.4	6%	157	9%	8%
Information & communication	191.2	9%	28	2%	4%
Financial & insurance	46.9	2%	23	1%	2%
Property	81.0	4%	63	4%	5%
Professional, scientific & technical	409.0	18%	134	8%	15%
Business administration & support services	186.8	8%	81	5%	7%
Public administration & defence	6.5	*%	32	2%	1%
Education	38.0	2%	146	8%	2%
Health	99.6	5%	141	8%	8%
Arts, entertainment, recreation & other services	144.8	7%	186	11%	8%
Not known	-	-	3	-	-
Total	**1,123.6**	**100%**	**1,750**	**100%**	**100%**

Interpretation of the Data

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

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

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

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

1.24 Graphics are used extensively in this report to make it as user friendly as possible. The pie charts and other graphics show the proportions (percentages) of residents making relevant responses.

The Survey of Customers who had Switched Retailer (Wave 2)

Data source

1.25 The Market Operator Services Limited (MOSL) collects supply point identification (SPID) data, including information indicating whether a supply point had experienced a switch in retailer. It also holds information about the customers with which these SPIDs are associated. MOSL provided a complete database of SPIDs which had experienced a switch. As an organisation might have multiple premises, ORS used the information MOSL provided to identify a unique list of organisations that had experienced switching activity. This list served as a reasonable profile for the entire population of switchers as of November 2017.

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

The Survey

1.27 The survey was carried out by telephone over an 8-and-a-half-week period between 8th February and 9th April 2018. In total, 1,399 full interviews were completed with organisations that had switched retailer.

1.28 Once respondents had confirmed that they had switched retailers at the beginning of the survey, they were asked a series of questions about the following topics:

- Their satisfaction with their current retailer;
- Their experience searching for and comparing retailers;
- The interactions they'd had with intermediaries;
- The experience of, and benefits from, switching retailer;
- Any problems they had experienced.

1.29 Organisations with sites in Scotland were also asked questions about their experiences with and perceptions of the Scottish market compared to the English market.

Weighting

1.30 Once a population of switchers had been determined, the sample was stratified in order to achieve a more equal number of interviews in each water region. This was done with the aim of comparing the experiences of customers in different water regions. Due to a lack of sample information, sample could not be stratified by organisation size or type (SIC). Results were subsequently weighted so that each region had an appropriate influence on the overall result and was representative of switchers.

1.31 The profile tables below and overleaf show the differences between the weighted and un-weighted percentages.

Profile Tables

1.32 Full details of the profile characteristics of each organisation are shown in the tables below. Any value denoted by a * represents a percentage which is less than 1%.

Size of Organisation	Survey Responses		
	Unweighted		Weighted
	Number	Valid %	Valid %
Micro (1-9 employees)	839	60%	59%
Small (10-49 employees)	414	30%	30%
Medium (50-249 employees)	90	6%	7%
Large (250+ employees)	56	4%	4%
Total	**1,399**	**100%**	**100%**

Water Region	Population		Survey Responses		
	Total orgs		Unweighted		Weighted
	Thousands		Number	%	%
Anglian Water	1855	9%	227	16%	9%
Northumbrian Water	974	5%	98	7%	5%
Southern Water	3193	15%	181	13%	15%
Severn Trent Water	4574	21%	221	16%	21%
South West Water	327	2%	65	5%	2%
Thames Water	7032	33%	271	19%	33%
United Utilities	1230	6%	100	7%	6%
Wessex Water	1001	5%	98	7%	5%
Yorkshire Water	836	4%	123	9%	4%
Multi-region	376	2%	15	1%	2%
Total	**21,398**	**100%**	**1,399**	**100%**	**100%**

Type of Organisation	Survey Responses		
	Unweighted		Weighted
	Number	Valid %	Valid %
Agriculture, forestry & fishing	28	2%	2%
Mining, quarrying & utilities	4	*%	*%
Manufacturing	137	10%	11%
Construction	63	5%	5%
Motor trades	161	12%	11%
Wholesale	57	4%	4%
Retail	136	10%	11%
Transport & storage (inc postal)	29	2%	2%
Accommodation & food services	179	13%	11%
Information & communication	25	2%	2%
Financial & insurance	13	1%	1%
Property	33	2%	3%
Professional, scientific & technical	100	7%	7%
Business administration & support services	47	3%	4%
Public administration & defence	14	1%	1%
Education	48	3%	3%
Health	95	7%	6%
Arts, entertainment, recreation & other services	224	16%	16%
Not known	6	-	-
Total	**1,399**	**100%**	**100%**

Interpretation of the Data

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

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

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

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

1.37 Graphics are used extensively in this report to make it as user friendly as possible. The pie charts and other graphics show the proportions (percentages) of organisations making relevant responses.

2. Executive Summary

Summary of Main Findings

Results from the Quantitative Telephone Survey

2.1 The following paragraphs highlight some key findings from the customer insight surveys. This includes – where relevant – comparisons between the results from the 2017 survey conducted with all eligible non-household customer (Wave 1), and the 2018 survey conducted only with non-household customers who had switched retailer (Wave 2). Readers are referred to the detailed graphics for the full story. The suite of ORS tables also includes full cross tabulations.

2.2 Readers are also referred to the results of the Customer Awareness Survey carried out in 2016 before the opening of the market, which is also available under separate cover.

Awareness of the changes

2.3 Almost half (48%) of customers were aware, prior to taking part in the survey, that since April 2017 organisations have been able to change who supplies their clean water and their waste water retail services, or potentially move to a better deal with their existing provider. This is an increase of 16% since the 2016 survey (32% were at least aware that some changes were happening) which took place before the opening of the retail market. However, just over half (52%) of customers were still not aware of the changes at the time of the 2017 survey.

2.4 In terms of which customers are more or less aware, there has been little change since 2016. Medium and large customers are significantly more likely to be aware of the changes: for example, 89% of large customers were aware, compared to 48% overall. This is particularly emphasised because micro-customers make up the majority of all organisations in the population, and they are generally less aware of the changes than larger customers.

2.5 Customers in the motor trades, information and communication, property, education or arts, entertainment, recreation and other services are also significantly less likely to be aware of the changes.

Overall Satisfaction

2.6 The level of satisfaction with current suppliers (77%) is in-line with results from the 2016 survey (76%) however levels of dissatisfaction have increased by 4 percentage points (from 5% to 9%) since 2016. Larger customers and those who use more than 5,000,000 litres of water a year, but also sole traders are significantly less likely to be satisfied with their current supplier.

2.7 The most frequent reason given by customers for being dissatisfied with their current water and waste water retail services supplier was billing issues (74%), followed by customer service (63%).

2.8 Comparatively, just over four fifths (82%) of switchers in the second wave of the survey are satisfied with their current retailers(s), with 9% (the same proportion as customers overall) saying they were dissatisfied.

2.9 While overall satisfaction with the current retailer differed between switchers with certain demographic characteristics, specific experiences in the market were also correlated with overall retailer satisfaction. In particular, switchers who found it easy to find information, easy to compare different providers, and

found the switching process itself easy were significantly more likely to say they were satisfied with their retailer.

2.10 Those who negotiated the price with their new retailer and approached their old retailer about the possibility of a better deal were also significantly more likely to be satisfied. Respondents who only received price quotations from a single retailer were significantly less likely to be satisfied, while even respondents who only received two price quotations were more likely to be satisfied. There were too few switchers who received more than two price quotations with which to compare satisfaction levels.

2.11 Those who experienced problems with their retailer were significantly less likely to be satisfied. This was especially the case if they experienced problems exclusively with their new retailer, while those who experienced problems exclusively with their old retailer were not statistically different to average. Even where respondents said the problem did not have a serious impact on their business, this was associated with significantly lower satisfaction and higher dissatisfaction, as were those who said the problem cause a very or fairly serious impact to their business.

2.12 Consolidation also had a relationship with satisfaction. Those customers who consolidated multiple utilities (including water) to the same supplier were significantly more likely to be satisfied with their retailer. However, customers that had consolidated multiple premises to a single bill were significantly less likely to be satisfied.

2.13 Receiving any kind of benefit generally from switching, but especially a reduction in prices, was associated with significantly higher satisfaction, while switchers who received no benefits from switching or felt they were worse off were significantly more likely to be dissatisfied.

2.14 Switchers who felt that they had saved more than, or about the same as they expected to save prior to the switch were significantly more likely to be satisfied with their retailer, while those who had saved less or felt it was too early to tell if they had made savings were significantly less likely. Similar results were found with the quality of retail services like billing and meter reading. Those who felt this was better or about the same as their previous retailer were more satisfied, while those who felt this was worse than their previous retailer were more dissatisfied.

Market Engagement

2.15 Across all customers, fewer than a fifth (16%) have actively considered or are currently actively considering switching. Just over 1 in 20 (6%) have actually switched and 3% are currently actively considering. 7% have considered switching but the switch has either failed (2%) or they decided not to (5%). Around a third (34%) plan to consider in the future (6% in next 3 months, and 28% ‘in the future’); however, half (50%) are not interested in switching at all.

2.16 Customers in the water regions of Severn Trent or Thames Water, as well as those in the construction, accommodation & food services, education and arts, entertainment, recreation & other services sectors are significantly more likely to have switched their retailer since the market opened.

Searching and Comparing

2.17 Of those who have actively considered switching (whether they have now switched or not) around a third (34%) went to a retailer’s website to search for information about alternative retailers, while almost as many used a price comparison website (31%) or a broker (30%). Over 1 in 5 (23%) made direct contact with another retailer.

2.18 By contrast, around half (50%) of all successful switchers in Wave 2 made direct contact with another retailer when searching for information, and almost a quarter (23%) had used a broker. 15% had used a price comparison website, but only 10% said they went to another retailer's website.

2.19 Out of all customers who searched for information on alternative retailers, over 7 in 10 found it easy to find the information they needed (25% found it very easy), however of those who found it difficult (23%) the vast majority found it very difficult (22%). When asked why it was difficult to find the information the reason most frequently given was that the information was not available via the phone/online/other preferred method (61%). Small organisations were significantly more likely to have found the information they needed easily. Both SME and large customers are significantly less likely to have found it difficult (11% and 20% respectively) when compared to all customers (48%).

2.20 Out of the successful switchers, more than four fifths of respondents (82%) said it was easy to find the information they needed, while only 1 in 10 (10%) found this hard. Of the respondents who said it was difficult to find the information they needed, around 3 in 10 (31%) said this was because they couldn't get the information immediately or quickly enough. Around a quarter said they didn't know where to look for information (26%), and that the information that was found wasn't clear or understandable (25%). By contrast to the survey of all customers, only 17% said they had difficulties because they could not access information due to information not being available via phone/online/their preferred communication method.

2.21 With regards to comparing the different retailers, while over half (55%) of all active customers (those who have switched retailer, are actively considering switching, had tried to switch and failed or considered switching and decided not to) found this easy (24% very easy), around two fifths (39%) found this difficult. The most frequent reason given for why this was difficult was that again that information wasn't available via phone/online or other preferred method (54%), while around two fifths (41%) found that information wasn't clear or was hard to compare.

A higher proportion of successful switchers suggested it was easy to compare retailers than active customers overall. Active customers include those who switched in Wave 1, were actively considering switching, tried to switch and failed and considered switching but decided not to. Around 7 in 10 switchers (71%) in Wave 2 said it was easy to compare retailers, while around 1 in 10 (11%) said they found this difficult. The ease or difficulty of comparing retailers differed depending on the water region the switcher belonged to as well as which retailers they had both switched to and from.

2.22 The following factors are considered important when comparing retailers by over three quarters of customers: quality of billing services (96%), price (95%), quality of customer service (95%) water efficiency, leakage control and enhanced metering services (80%), reputation of the retailer (80%) and consolidating water and sewerage services to the same retailer (76%). However, consolidating different utilities to the same supplier (44%), consolidating multiple premises to the same retailer (36%) and online account management services (34%) were the factors most frequently rated as unimportant.

2.23 For those who haven't actively considered switching, the quality of billing services was rated as important in general by the highest proportion of customers (91%), while quality of customer service (89%), water efficiency, leakage control and enhanced metering services (86%) and price (85%) were all also rated as important in general by over four fifths of customers. Again, online account management service was rated as less important than other aspects.

2.24 Here the priorities of switchers were similar to those of customers overall. Among switchers, quality of billing services and price (92%) were both seen to be the most important factors in decision making when comparing retailers. Online account management (61%) and consolidating utilities (including water) to

the same supplier (38%) were the least important factors in switchers' decisions when comparing retailers.

Intermediaries

2.25 Of those who used a broker or consultant to search for information about alternative retailers, over four fifths (82%) were contacted by the broker or consultant, while the remaining 18% approached them themselves.

2.26 The majority (94%) of those who used a broker, consultant or a price comparison website were satisfied with the discussions they had with them/use of the website, with around three fifths (61%) being very satisfied. Only 1% were dissatisfied.

Arranging a switch

2.27 For the most part, retailers offered prices on a take it or leave it basis (76%), with around a fifth of switchers having negotiated prices with their new retailer (19%). 1 in 20 switchers (5%) ran a formal tender process.

2.28 While the majority of switchers have had no contact with their previous retailer prior to signing up with their new retailer (76%), around 1 in 6 (16%) had pro-actively approached their retailer about the possibility of a better deal. Only 1 in 20 (5%) were contacted by their old retailer before signing up to their new retailer, and a smaller number (3%) were approached after already having agreed to switch.

2.29 However, despite having had contact with their previous retailer either before or after the switch, around three quarters (76%) said that their previous retailer hadn't offered them any kind of deal to encourage them to stay. Around a fifth (18%) said they had been offered a cheaper tariff, and a small minority (1%) said they were offered an additional service to encourage them to stay.

Switching

2.30 In the survey of all customers, of those who switched (including those who started to switch but something prevented it from happening), around two fifths (43%) arranged the switch via a retailer's website or contacted the new retailer directly, while a further 36% used a broker or consultant.

2.31 The survey of just switchers found a higher proportion using a retailer website or direct contact with a retailer (67%), and slightly lower proportion using a broker or consultant (27%). In both surveys, only 2% had used a price comparison website.

2.32 Around half of those who decided to switch, did so solely because it was cheaper/to save money. Others made the decision based on multiple factors, including cost, but also to consolidate bills and suppliers and to make the process simpler.

2.33 Once they had actually chosen the retailer they wanted to switch to, over three quarters (76%) found the actual process of switching easy, with 65% finding it very easy. However, almost all of those who did not find it easy, found it very difficult. Those who did find it difficult stated the reasons as being to do with the length of time it took to switch/close off old account and settle final bills and that generally the process was complicated.

2.34 The most frequently given reasons for not yet having considered switching (which accounts for 84% of all eligible non-household customers) were that the service is good/happy with current retailer (37%); they intend to in the future but haven't got around to it yet (26%) and it's too much effort to switch/no point

(19%). Therefore, it seems that the time/effort involved and not seeing any advantages to switching are the main barriers to switching rather than difficulties in actually searching for or the process of switching.

2.35 The most frequently given reasons for deciding not to switch after actively considering it (which accounts for 5% of customers) were that savings were minimal/didn't save enough money (43%) and the current service is good/happy with current retailer (35%).

2.36 For those who started to switch but said something had stopped it from happening (just 2% of customers), the reasons for this were varied. However, having issues with communication from either the new or old supplier or between the two was mentioned by several customers, as well as that it was generally taking a long time, there was not enough information and that it was too much work.

Savings from Switching

2.37 For the small subgroup who had switched in Wave 1, around two fifths (41%) report that their bills have reduced by between 46% and 50%; however almost half (49%) report savings of 10% or less, with 17% reporting that there has been no reduction in their water bills since they have switched.

2.38 All (100%) of those who saw a reduction in their water bill reported that this was at least partly due to a reduction in tariff, while around 1 in 5 (19%) also reported savings owing to water efficiency. For those who have made savings through both a reduced tariff and water efficiency, over four fifths (86%) report that the reduction in tariff accounts for 96-100% of the overall saving.

2.39 Savings found in the survey of switchers were more modest. 40% of respondents said they had experienced or expected no reduction in bills. Around a fifth (21%) had made savings in the range of 1-5%, while just less than a fifth (18%) said they had saved between 6% and 10%. However, a similarly high proportion (96%) attributed the savings either in part or entirely due to a reduction in tariff. Around 1 in 5 (19%) said this was due to water efficiency/leakage detection services.

2.40 Around four fifths (79%) of the subgroup of switchers in Wave 1 has entered into a contract of at least a year but less than 2 years, while for 9% the contract is rolling/not fixed term. Only 1 in 10 (10%) have entered contracts lasting 2 years or more. Instances of contracts of less than a year were similarly low in the larger survey of switchers (1%), but only 37% were between a year and 2 years. Contracts between 2 and 3 years were also common, with around 3 in 10 (29%) switchers indicating this contract length. 16% had a contract lasting 3 or more years, while 17% had a rolling contract with no fixed length.

2.41 Of those who have not switched, almost three quarters (73%) would switch for a saving of up to 25%, with a further 13% stating they would only switch if they saved been 25% and 50%. However, over 1 in 10 (12%) still would not switch, however much they saved.

Renegotiating

2.42 Of those who were aware prior to the survey that they could either switch to a new retailer, or negotiate a new deal with their existing retailer from April 2017, only 8% have attempted to negotiate a better deal with their current supplier since April 2017. The most frequently given reason for attempting to renegotiate was that they wanted a lower price (41%), followed by bill consolidation across multiple premises (9%).

2.43 Of those who attempted to renegotiate, only around a fifth (21%) actually agreed a renegotiated contract with the retailer. The main reported benefits from renegotiating was that they made financial savings (41%).

2.44 In terms of financial savings, almost all of those who have renegotiated have experienced (or expect to experience) savings of between 1% and 15%, with no organisation saving over 40%. Almost all those who have made financial savings attributed the saving to a reduced tariff, with around two thirds reporting that they also made savings through water efficiency.

Benefits from Switching

2.45 In the survey of switchers, more than half experienced a reduction in prices (55%) as a result of switching retailer, while a fifth (20%) experienced consolidation across water and wastewater billing.

2.46 Just less than two thirds (63%) of switchers saved about the same as they expected to save prior to the switch. 15% said that they had saved more than expected, while 9% had saved less than expected.

2.47 While 6 in 10 (60%) switchers said the quality of retail services had remained the same since the switch, a quarter (26%) said they had got better and 9% said they had got worse.

2.48 Switchers who indicated they had multiple non-household premises were asked whether they consolidated their sites to a single bill. A third (33%) had consolidated sites but two thirds (67%) had not.

2.49 Of the small number of switchers in the survey of all non-household customers (68), a quarter (25%) of those who decided to switch indicated they had consolidated their water retail services with their other utilities, such as electric, telephone or gas so that they are provided by the same retailer. This contrasts with the results for Wave 2 where 1,399 switchers were asked the same question and only 6% of switchers reported consolidating their water retail services with other utilities.

2.50 For the switchers who had consolidated utilities, more than four fifths (83%) had done so with their electricity provider. Around half (53%) had consolidated with their gas, and more than two fifths (43%) had consolidated with their telecoms.

Problems and Complaints

2.51 Less than 1 in 10 customers overall (7%) have experienced problems with their clean or waste water services since 1st April 2017. For those that had, over three fifths (61%) of problems related to a repairs or problems with water leaks, quality of water or similar, while around a third (34%) related to billing issues.

2.52 The same proportion (7%) of switchers had also experienced problems with their services since April 1st. 71% of these had experienced the problem with either their new retailer or both their old and new retailers. The nature of the problems experienced were similar between the old and new retailers; these were mainly billing issues, followed by repairs/water leaks etc.

2.53 Over half of the problems experienced had at least a fairly serious impact on the business, with over two fifths (42%) saying that there was a very serious impact. However, around a fifth reported that the problem had no impact at all.

2.54 Just over 1 in 10 (12%) of those who have experienced any problems with their clean or waste water since April 2017 have made a complaint about their clean or waste water services within this period. Over three fifths (64%) of complaints related to repairs or problems, for example water leaks or quality of water, while almost a fifth (18%) related to billing issues.

Interaction with the Scottish market

2.55 Only 19 switchers interviewed had premises in Scotland. These customers were asked a series of questions about their interaction with the Scottish water market. Due to the low number of responses, these results are indicative only.

2.56 Over half of the problems experienced had at least a fairly serious impact on the business, with over two fifths (42%) saying that there was a very serious impact. However, around a fifth reported that the problem had no impact at all.

2.57 Just over 1 in 10 (12%) of those who have experienced any problems with their clean or waste water since April 2017 have made a complaint about their clean or waste water services within this period. Over three fifths (64%) of complaints related to repairs or problems, for example water leaks or quality of water, while almost a fifth (18%) related to billing issues.

2.58 Almost all (11 of 13) customers who have consolidated their English & Scottish sites to the same retailer receive a consolidated bill.

2.59 Almost half (7 of 15) of customers said the retail market between Scotland and England is very/fairly disjointed. 5 customers said the markets were very/fairly seamless and the rest (3) said they were neither disjointed nor seamless.

Results from the Welsh Water Region

2.60 As the water market operates differently in the Dŵr Cymru Welsh Water region (in that only organisations using 50ML+ annually in this region can switch retailers), the population of organisations interviewed differed to those in English water regions. All customers eligible to switch in the Dŵr Cymru Welsh Water region were identified, and 25 organisations were interviewed. As well as being high water users, these organisations were significantly more likely spend more than £100,000 on their water bills (98% compared to <1% overall), be SMEs (62% compared to 14% overall) large organisations (38% compared to <1% overall), as well as to have trade effluent licenses (36% compared to 6% overall).

2.61 Their awareness of and experience in the water market also differed from customers overall in certain respects. Eligible customers in the Dŵr Cymru Welsh Water region were significantly more likely to be aware of the changes to the water market, be satisfied with their current retailer, and aware that intermediaries could help them compare opportunities in the water market. However, they were significantly less likely to have switched, to have tried to switch but had something prevent it from happening, or be thinking about switching in the next three months.

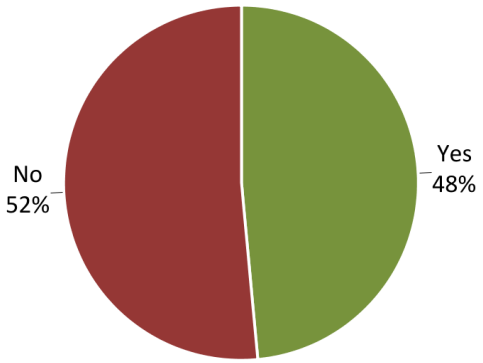
3. Survey of all Non-Household Customers

Results from Quantitative Telephone Survey

Awareness of changes

3.1 Almost half (48%) of customers were aware, prior to taking part in the survey, that since April 2017 customers have been able to change who supplies their clean water and their waste water retail services, or potentially move to a better deal with their existing provider. This is an increase of 16% since the 2016 survey (32% were at least aware that some changes were happening) which took place before the opening of the retail market. However, just over half (52%) of customers were still not aware of the changes at the time of the 2017 survey.

Figure 1: Since April 2017, organisations have been able to change who supplies their clean water and waste water or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?



Base: All Customers (1750)

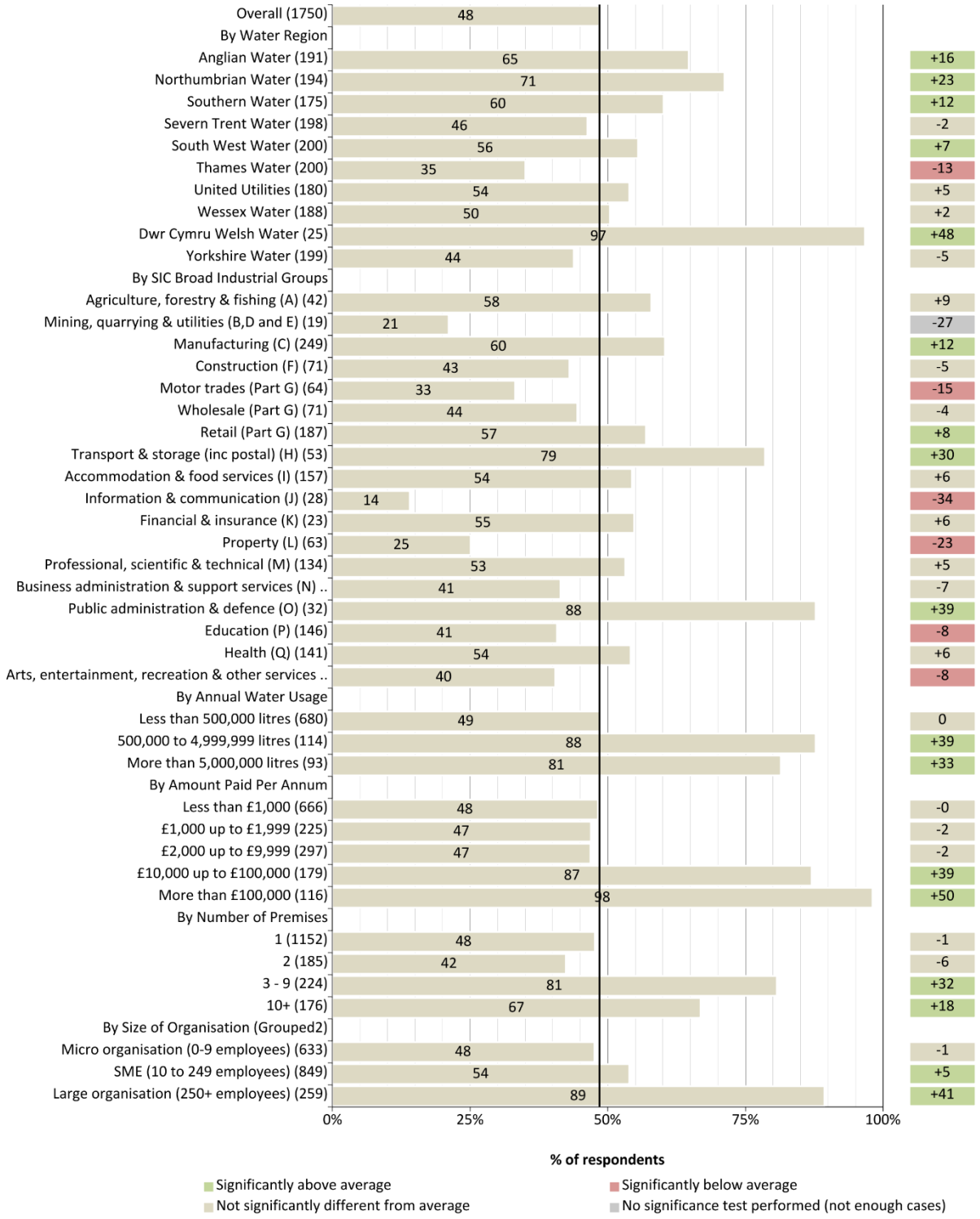
3.2 Figure 2 overleaf shows how levels of awareness vary by sub-group: customers in the water regions of Anglian Water, Northumbrian Water, Southern Water, South West Water or Dŵr Cymru Welsh Water; and those in manufacturing, retail, transport & storage or public administration & defence are significantly more likely to be aware of the changes.

3.3 In particular, it should be noted that SME (10-249 employees) and large customers (250+ employees) are significantly more likely to be aware of the changes: for example, 89% of large organisations, and 54% of SME customers were aware, compared to 48% overall. This is particularly emphasised because micro-organisations make up the majority of all customers in the population, and they are generally less aware of the changes than larger organisations. Additionally, customers with 3 or more premises, those who used higher levels of water (500,000 litres+ annually) or had higher annual water bill costs (£10,000+) were more likely to be aware of the water market opening.

3.4 Customers in the water regions of Thames Water, those in the motor trades, information and communication, property, education or arts, entertainment, recreation and other services are also significantly less likely to be aware of the changes to the water retail market.

3.5 On the whole, the sub-groups who are significantly more/less likely to be aware of the changes at the point of the 2017 survey match those who were more/less likely to be aware of the upcoming changes in the 2016 survey.

Figure 2: Since April 2017, organisations have been able to change who supplies their clean water and waste water or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?

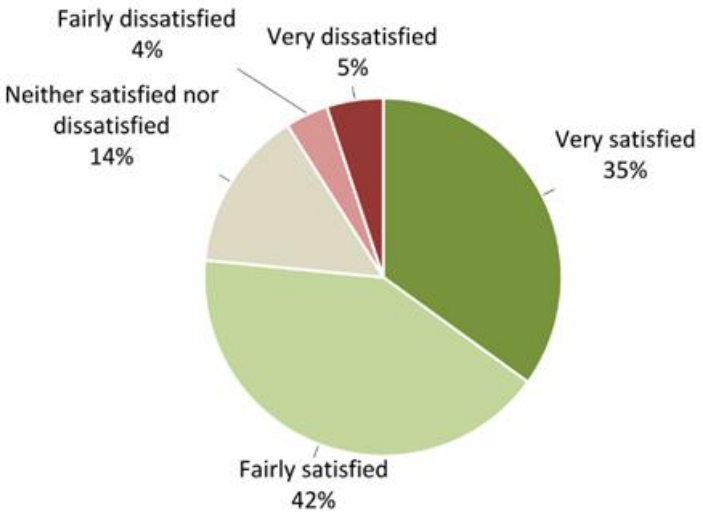


Base: All Customers (number of respondents shown in brackets)

Overall Satisfaction

3.6 Customers were asked overall how satisfied or dissatisfied they are with their current clean water and waste water retailer(s). Just over three quarters (77%) are satisfied with their current supplier(s), with only 9% saying they are dissatisfied. Satisfaction levels are in-line with the 2016 survey (76% satisfied), however levels of dissatisfaction have increased since 2016 by 4 percentage points (5% dissatisfied in 2016).

Figure 3: Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)...?



Base: All Customers (1,731)

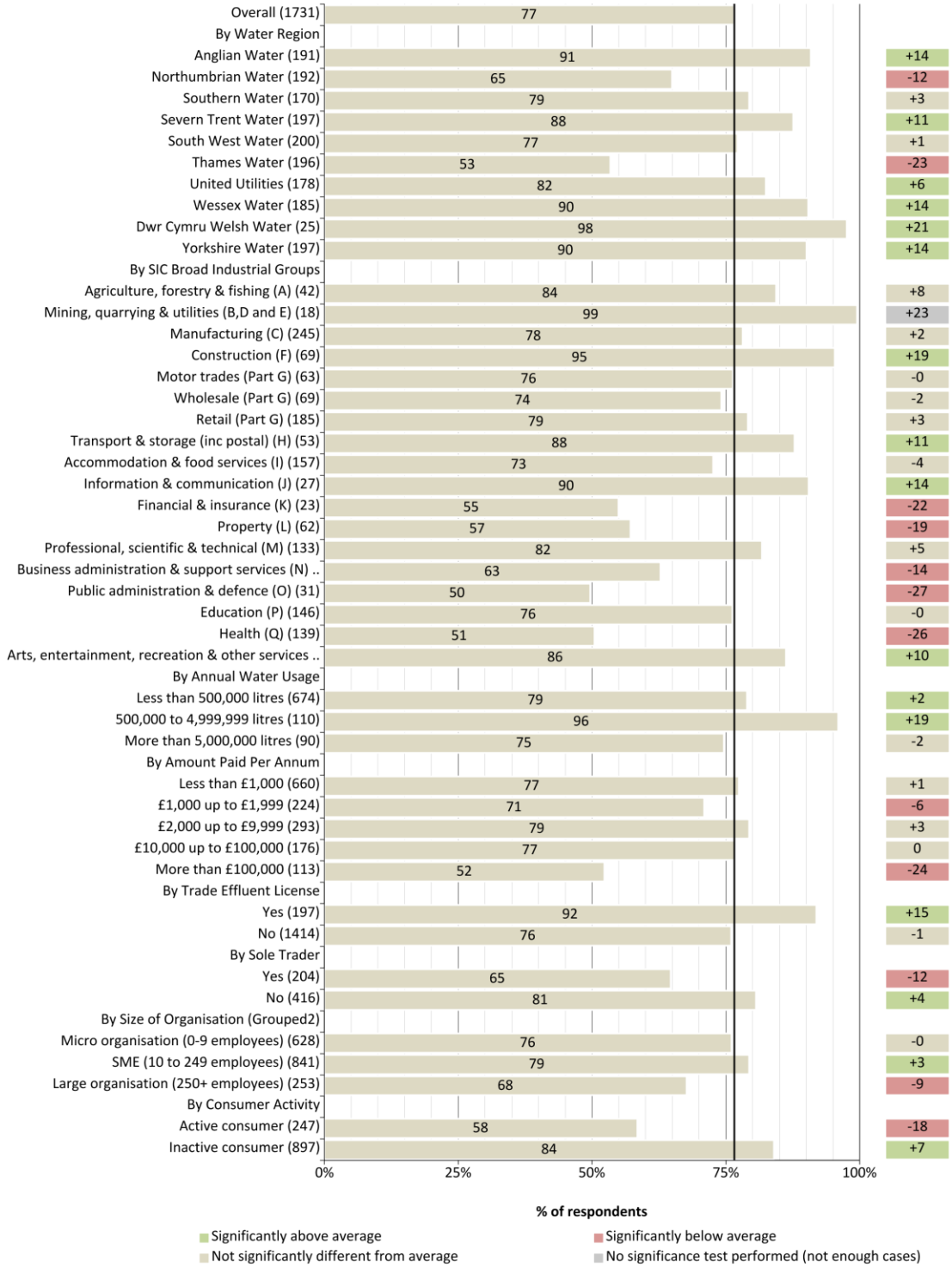
3.7 While satisfaction with overall service is generally high, Figure 4 overleaf shows how levels of satisfaction with water and waste water retailers vary by sub-group: customers who are in the water regions of Anglian Water, Severn Trent Water, United Utilities, Wessex Water, Dŵr Cymru Welsh Water or Yorkshire Water are significantly more likely to be satisfied with their overall service, while those in Northumbrian Water or Thames Water are significantly less likely to be satisfied.

3.8 Customers in the construction, transport & storage, information & communication or arts, entertainment, recreation & other services sectors; SME organisations, those who use <500,000 litres and 500,000 to 4,999,999 litres of water per year litres of water a year; and those with a trade effluent licence are significantly more likely to be satisfied with the overall service they currently receive.

3.9 Conversely, customers in the financial and insurance, property, business administration & support services, public administration & defence or health sectors, large customers and sole traders are significantly less likely to be satisfied with their current retailer.

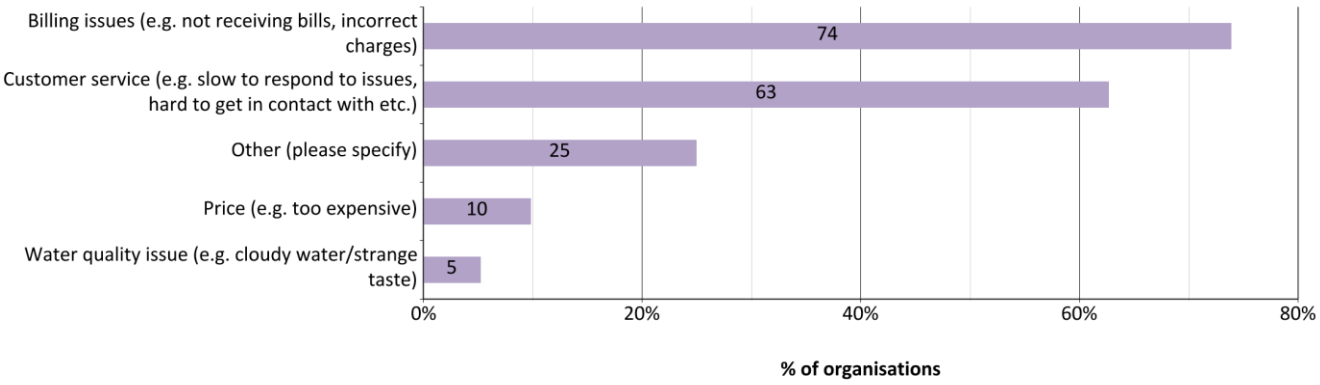
3.10 Additionally, customers that are active consumers (those who have switched retailer, are actively considering switching, had tried to switch and failed, or had considered switching and decided not to) are significantly less likely to be satisfied compared to average.

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



Base: All Customers (number of respondents shown in brackets)

Figure 5: Why were you dissatisfied?



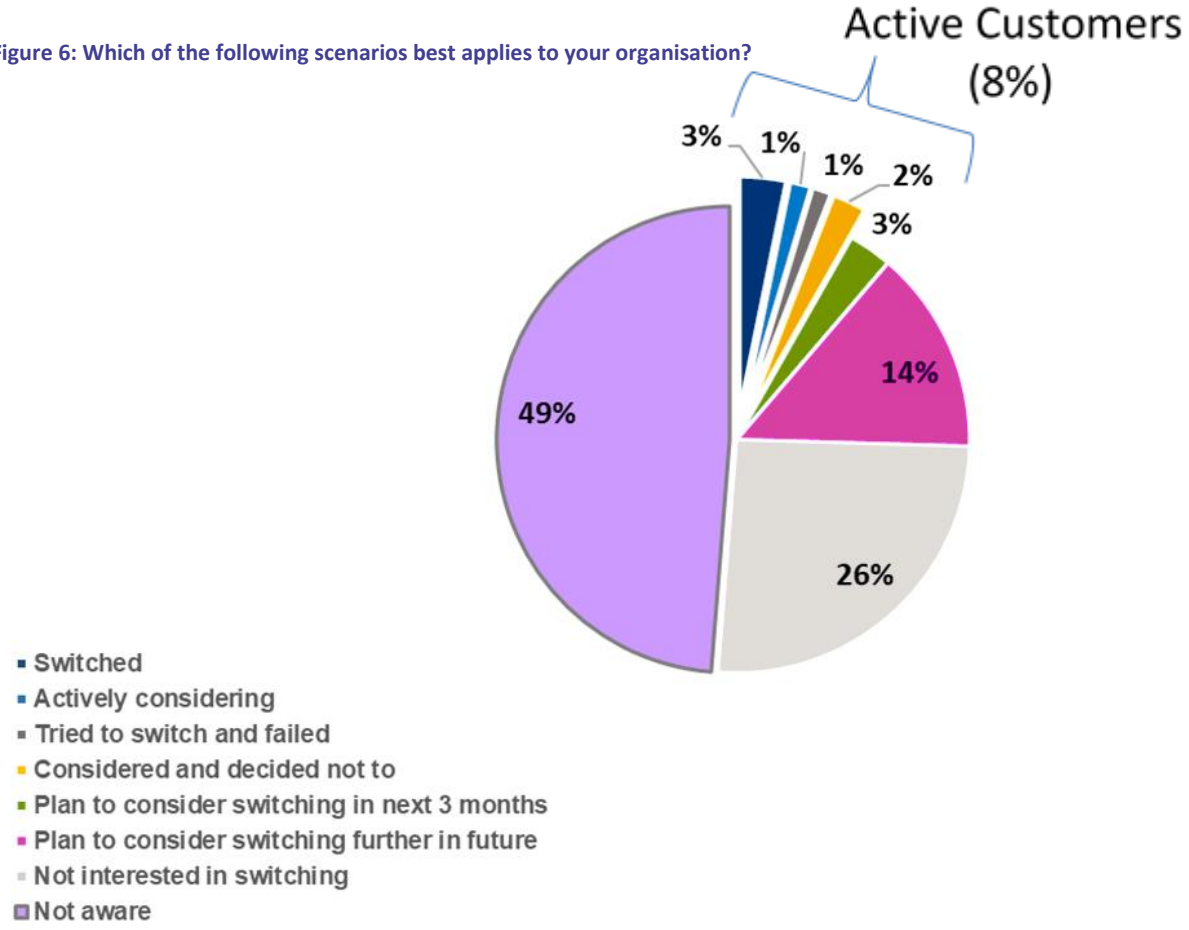
Base: Customers that were dissatisfied (144)

3.11 The most frequent reason given by customers for being dissatisfied with their current water and waste water retail services supplier was billing issues, for example not receiving bills or being charged incorrectly (74%), followed by customer service issues, for example retailers being slow to respond to issues, or being hard to get in touch with etc. (63%). Dissatisfaction with price (10%), and water quality issues (5%) were also mentioned.

Market Engagement

3.12 For the purposes of analysis, those who have switched retailer, are actively considering switching, had tried to switch and failed or considered switching and decided not to have been grouped into a category of 'active consumers'. Meanwhile, those who plan to consider switching in the next 3 months/further in the future and those who are not interested in switching at all have been grouped as 'inactive consumers'.

Figure 6: Which of the following scenarios best applies to your organisation?

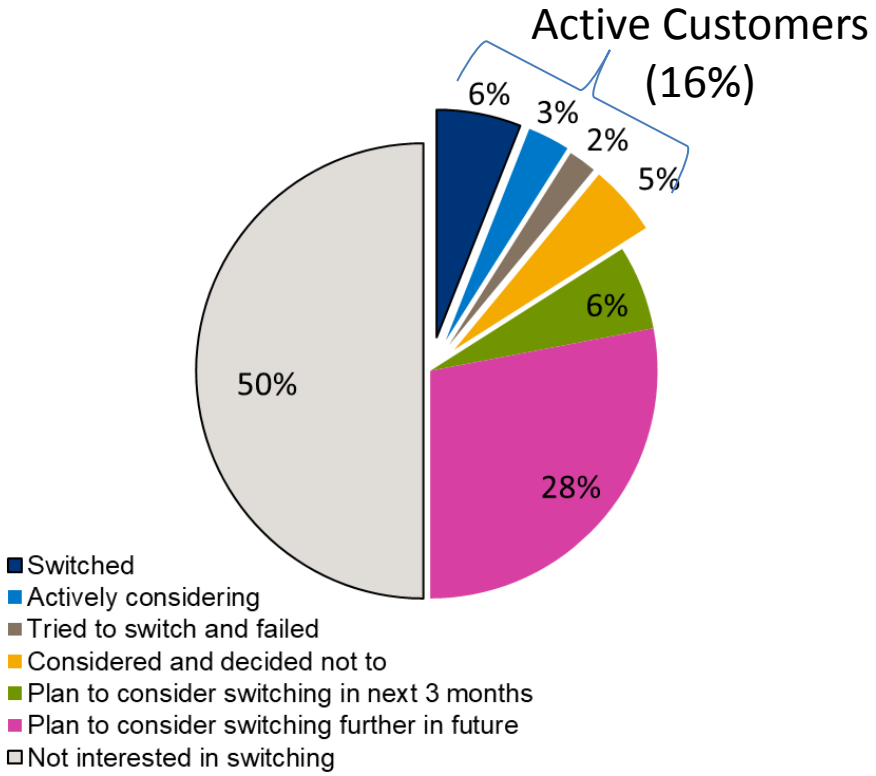


Base: All Customers (1,729)

3.13 Across all organisations, including those who were not aware that they were able to switch retailers prior to the survey, fewer than a 1 in 10 (8%) have actively considered or are currently actively considering switching. Of these, 3% have actually switched and 1% are currently actively considering switching (but have not yet switched), while 3% have considered switching but the switch has either failed (1%) or they decided not to (2%). Around a third (17%) plan to consider in the future (3% in next 3 months, and 14% at an unspecific point 'further in the future'). However, around a quarter (26%) are not interested in switching, and almost half (49%) were not aware of the changes to the market.

3.14 Customers were later asked whether they had attempted to renegotiate with their current or previous supplier for a better deal since market opening. Some customers, despite not having actively considered switching, did attempt to negotiate with their retailer. When including these customers, 11% of all non-household customers had actively engaged with the open market.

Figure 7: Which of the following scenarios best applies to your organisation? (AWARE OF CHANGES)



Base: All Customers who are aware of the changes (1,154)

3.15 Across all customers who were aware that they were able to switch retailers prior to the survey, fewer than a fifth (16%) have actively considered or are currently actively considering switching. Just over 1 in 20 (6%) have actually switched and 3% are currently actively considering switching (but have not yet switched), while 7% have considered switching but the switch has either failed (2%) or they decided not to (5%). Around a third (34%) plan to consider in the future (6% in next 3 months, and 28% at an unspecific point 'further in the future'). However, half (50%) are not interested in switching.

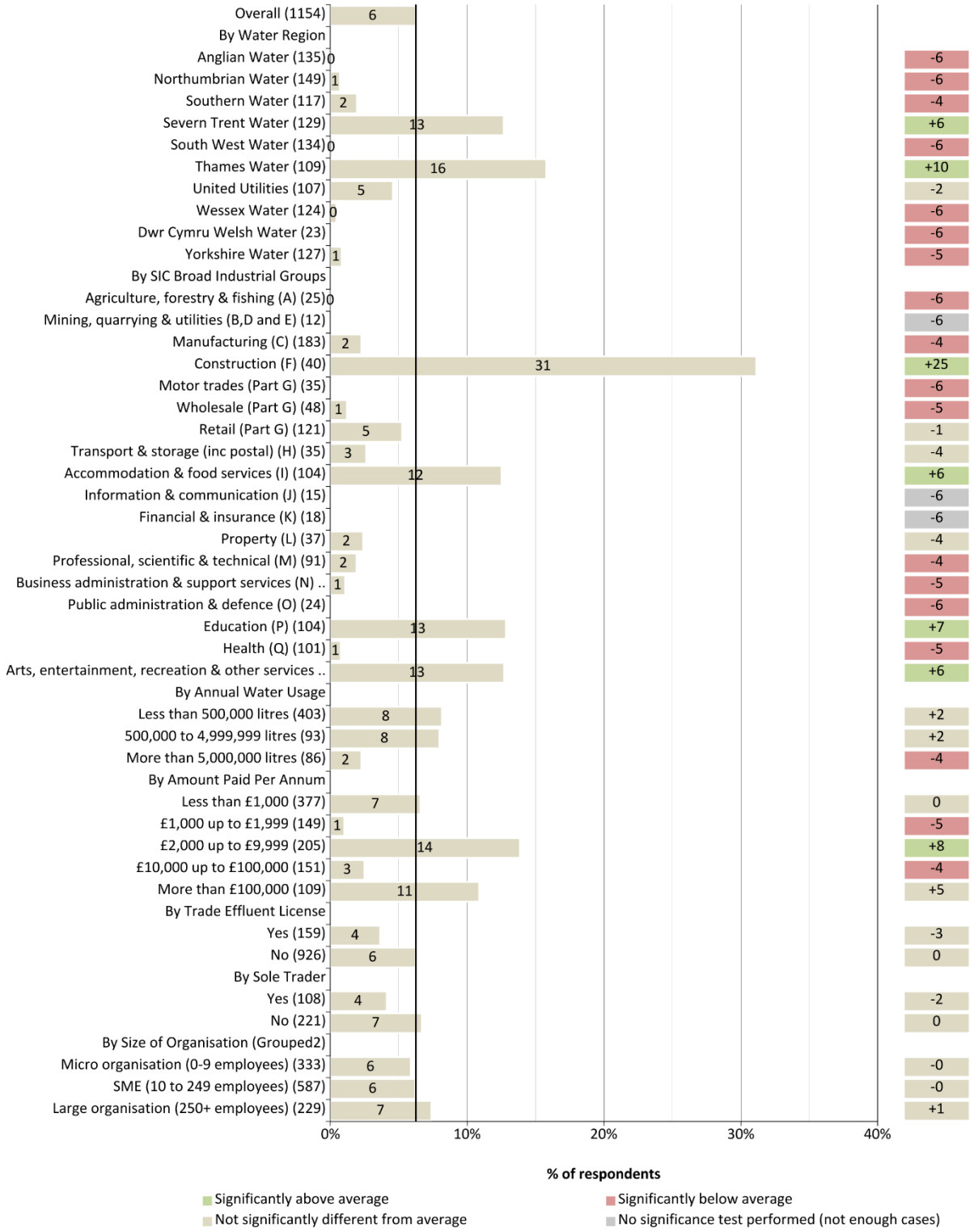
3.16 Subsequent analysis and results broken down by sub-group is based on customers who were aware of the changes prior to the survey. Active consumers were asked additional questions about their experiences in the market. Figure 8 overleaf shows how levels of switching vary by sub-group: customers who are in the water regions of Severn Trent or Thames Water; those in the construction, accommodation & food services, education and arts, entertainment, recreation & other services sectors; and those who pay between £2,000 and £9,999 per year for water services are significantly more likely to have switched their retailer since the market opened.

3.17 Conversely, customers in the water regions of Anglian Water, Northumbrian Water, Southern Water, South West Water, Wessex Water, Dŵr Cymru Welsh Water or Yorkshire Water; those in the Agriculture, manufacturing, motor trades, wholesale, professional, scientific & technical, business administration & support services, public administration & defence or health sectors; and those who spend either between £1,000 and £1,999 or between £10,000 and £100,000 on water per year are significantly less likely to have switched their retailer since the market opened.

3.18 Although the number of switchers is small, it is interesting to note that there are no significant differences in the proportion who have switched across micro (6%), SME (6%) and large businesses (7%).

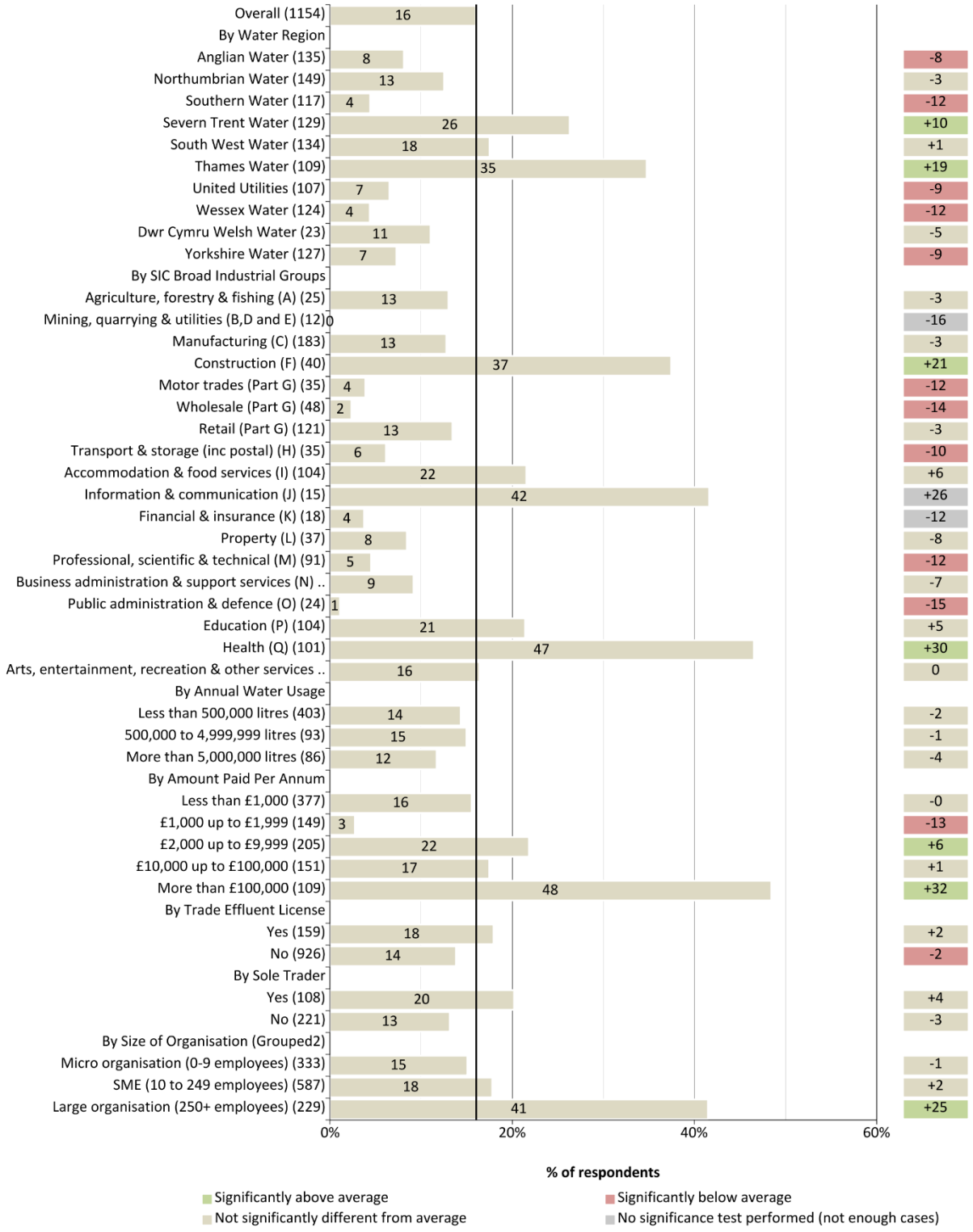
3.19 When including those customers who had renegotiated with their supplier but had not switched or considered switching, 21% of all customers who were aware of the market opening had actively engaged in some way with the open market.

Figure 8: Which of the following scenarios best applies to your organisation? Customers who have switched



Base: Customers who are aware of the changes (number of respondents shown in brackets)

Figure 9: Which of the following scenarios best applies to your organisation? Customers who are 'active'

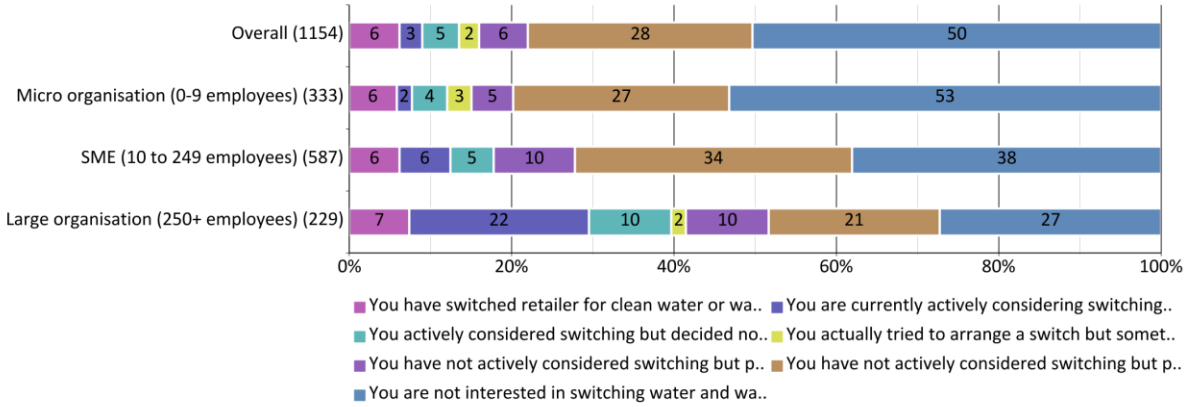


Base: All Customers who are aware of the changes (number of respondents shown in brackets)

3.20 This figure shows how levels of activity (I.e. customers classed as active) vary by sub-group: It is interesting to note that while in general those who are more likely to be active are also more likely to have actually switched supplier, large customers are significantly more likely to be active (41% compared with 16% overall) but are no more likely to have actively switched, while those in the health industry are significantly more likely to be active but significantly less likely to have switched.

3.21 The figure below breaks down switching activity levels by customer size, and further illustrates that larger customers are significantly more likely to be 'active customers', though no more likely to have actually switched. They are also significantly less likely to not be interested in switching their supplier (27% vs. 50% of all customers who were aware of the changes), and significantly more likely to be currently considering switching (22%), or have considered but decided not to (10%).

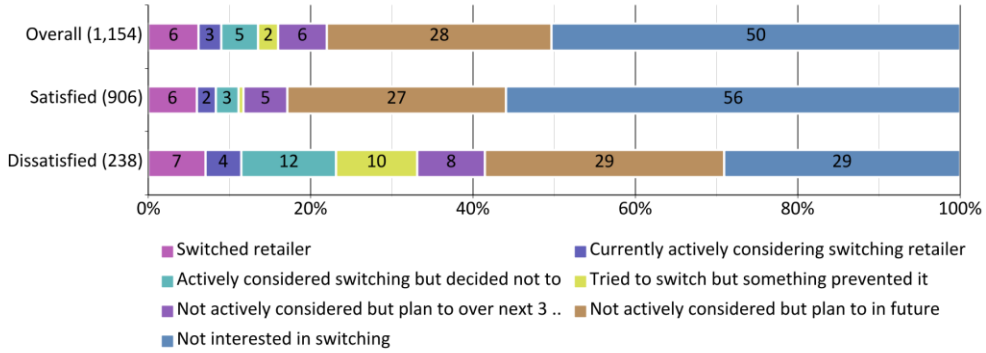
Figure 10: Which of the following scenarios best applies to your organisation? By Size of Organisation



Base: All Customers (number of respondents shown in brackets)

3.22 The figure below breaks down switching activity levels by overall satisfaction with their current clean water and waste water retailer(s), where it can be seen that while the proportion that have switched is broadly the same, those who are satisfied with their retailer are significantly more likely to say they are not interested in switching, while those who are dissatisfied with their retailer are significantly less likely to say they are not interested, when compared to all organisations. Furthermore, those who are dissatisfied with their retailer(s) are significantly more likely to have actively considered switching but decided not to or started to arrange a switch, but something prevented it from happening.

Figure 11: Which of the following scenarios best applies to your organisation? Breakdown by Overall satisfaction with current clean water and waste water retailer(s).

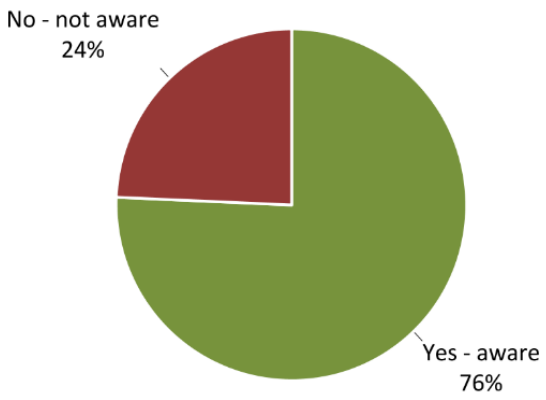


Base: All Customers (number of respondents shown in brackets)

3.23 With regards to the reasons given for being dissatisfied with their current clean water or waste water retailer(s), those who have not actively considered switching but plan to do so in the next 3 months or at some point in the future are significantly more likely to have said they are dissatisfied with their current retailer(s) because of the price (i.e. it's too expensive).

Searching and Comparing

Figure 12: Are you aware that intermediaries such as brokers and price comparison websites can help you compare the different opportunities in the water retail market?

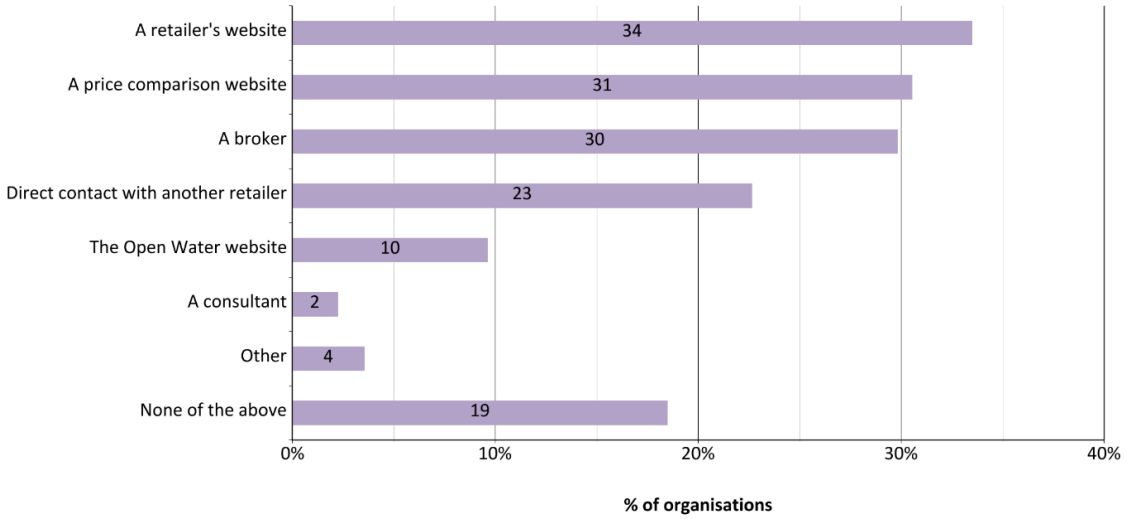


Base: Customers who are aware of the changes (1171)

3.24 Around three quarters (76%) of customers were aware that intermediaries such as brokers and price comparison websites can help compare different opportunities in the water retail market.

3.25 'Active customers' (those who had switched retailer, had actively considered switching, had tried to switch but had the switch cancelled or had actively considered switching but decided not to) were asked a series of follow up questions about their experience searching and comparing choices in the water market.

Figure 13: Which of the following have you used to search for information about alternative retailers?



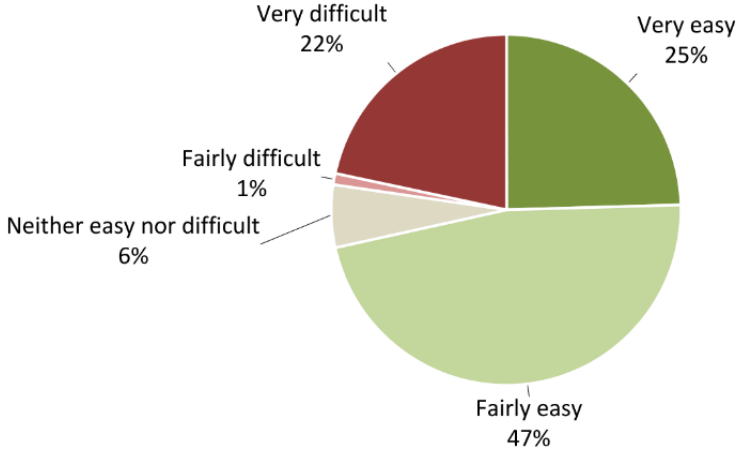
Base: Customers who have actively considered switching (242)

3.26 Of those who have actively considered switching (whether they have now switched or not) around a third (34%) went directly to a retailer's website to search for information about alternative retailers, while almost as many used a price comparison website (31%) or a broker (30%). Over 1 in 5 (23%) made direct contact with another retailer. Several of those who said they used 'other' means to search for information, used a tender process to find the best deal.

3.27 Those who switched were significantly more likely to use brokers and price comparison websites compared to average, while those who actively considered switching were significantly more likely to use a retailer's website, significantly less likely to have used a broker and significantly more likely to not have used any of the stated ways of searching for information.

3.28 SME and Large customers are significantly more likely than all customers to have used the open water website, or a consultant, while large customers are also significantly more likely to have used a broker. Both SME and large customers are also significantly less likely to have gone to a retailers' website or used none of the suggested means of searching for information about alternative retailers.

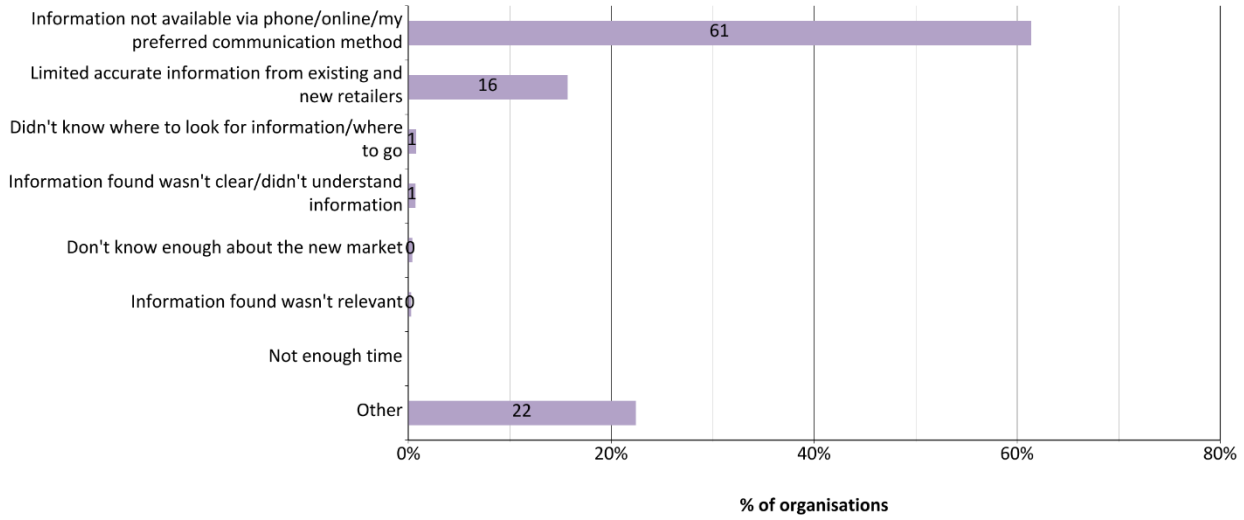
Figure 14: How easy or difficult was it for you to find the information you needed?



Base: Customers who actively considered switching (234)

3.29 Figure 14 shows that more than 7 in 10 customers (72%) found it easy to find the information they needed. Furthermore, SME customers (10-249 employees) are significantly more likely than all customers to have found it easy (87%), and both large and SME customers were significantly less likely to have found it difficult (14% and 6% respectively). However, almost all of those who found it difficult overall (23%) found it very difficult (22%).

Figure 15: Why was this difficult?

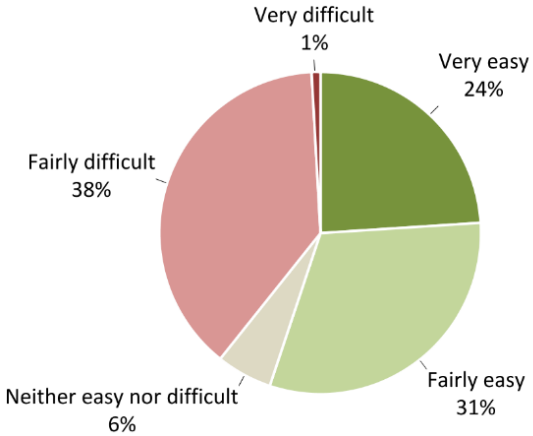


Base: Customers who said that finding the information they needed was difficult (34)

3.30 When asked why it was difficult to find the information the reason most frequently given was that the information was not available via the phone/online/other preferred method (61%), rather than information not being clear (1%) or relevant (<1%) or not knowing where to look (1%). However, 16% of respondents made comments suggesting that limited accurate information was available from their existing or new retailers.

3.31 10 customers gave more unique reasons for experiencing difficulties in finding information, and these were coded under 'other'. These reasons include difficulties communicating with brokers, problems finding meters, the effort involved in searching, a lack of retailers providing services in their areas, and because of having specific and complex waste water needs.

Figure 16: How easy or difficult was it to compare different retailers?

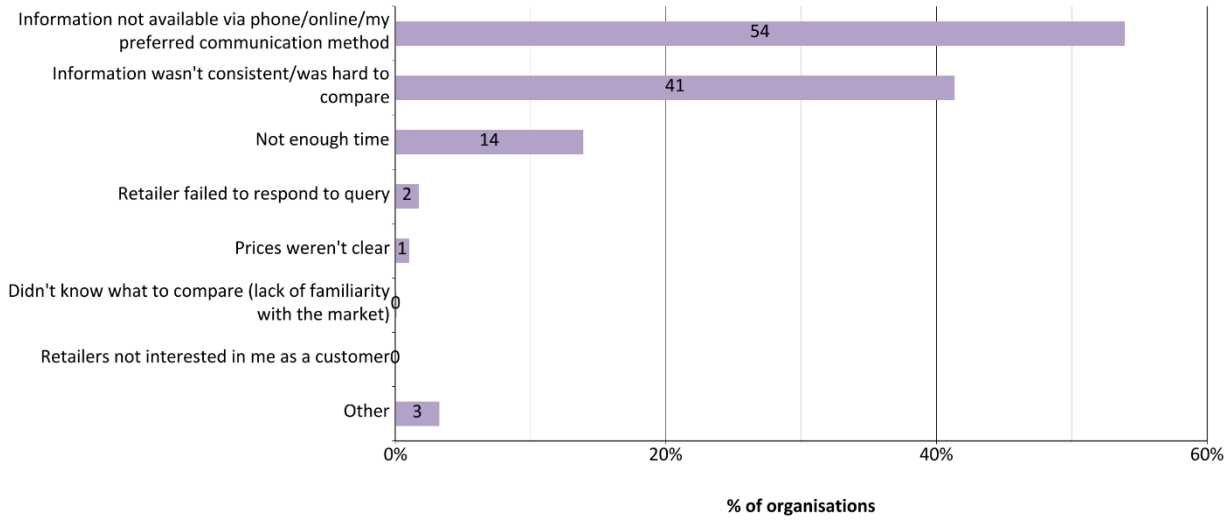


Base: Customers who actively considered switching (197)

3.32 With regards to comparing retailers, while over half (55%) found this easy (24% very easy), around two fifths (39%) found this difficult, with almost all saying it was fairly (38%) rather than very (1%) difficult.

3.33 In terms of customer size, SME customers (10-249 employees) are significantly more likely to have found comparing the different retailers easy, but this can be attributed specifically to small sized organisations, 93% of which said they found the information they needed easily. Large customers are significantly more likely to have found it neither easy nor difficult. Both SME and large customers are significantly less likely to have found it difficult (11% and 20% respectively) when compared to all customers (48%).

Figure 17: Why was this difficult?

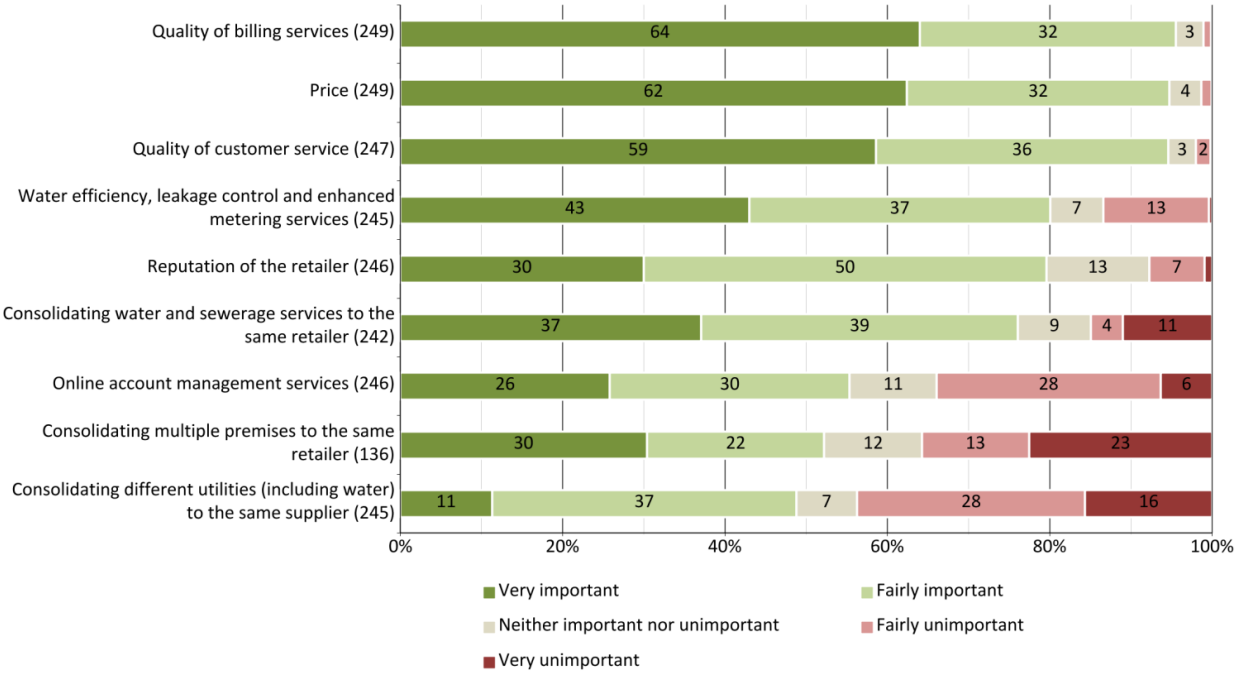


Base: Customers that found it difficult to compare different retailers (38)

3.34 The most frequent reason for finding this difficult was again that information wasn't available via phone/online or other preferred method (54%), while around two fifths (41%) found that information wasn't clear/was hard to compare. Not having enough time was an issue for 14% of those who found it difficult to compare retailers.

3.35 Less frequent answers included that retailers failed to respond to queries (2%) or that prices weren't clear (1%). Comments were also made by individual customers that they found it difficult because the margins were very small and were trying to compare retailers on 'more complicated' factors like offers and service; that energy brokers weren't as interested or knowledgeable about options in the water market; retailers withholding prices until April 1st, lack of history with new entrants into the retail market; trying to ensure rebates with the current retailer will also be issued by new retailers; knowing what services are included in the total quote (e.g. waste water/surface drainage).

Figure 18: How important or unimportant were each of the following factors in your decisions when comparing providers?



Base: Customers that have actively considered switching (number of respondents shown in brackets)

3.36 Active customers (those who have actively considered switching retailers) were asked how important or unimportant a range of factors were in their decisions when comparing providers.

3.37 Over 9 in 10 organisations, who have actively considered switching, feel that the quality of billing services (96%), price (95%) and quality of customer service (95%) are important, while around four fifths feel that water efficiency, leakage control and enhanced metering services (80%), reputation of the retailer (80%) and consolidating water and sewerage services to the same retailer (76%) are important.

3.38 However, consolidating different utilities to the same supplier (44%), consolidating multiple premises to the same retailer (for customers with multiple premises) (36%) and online account management services (34%) were the most frequently rated as unimportant.

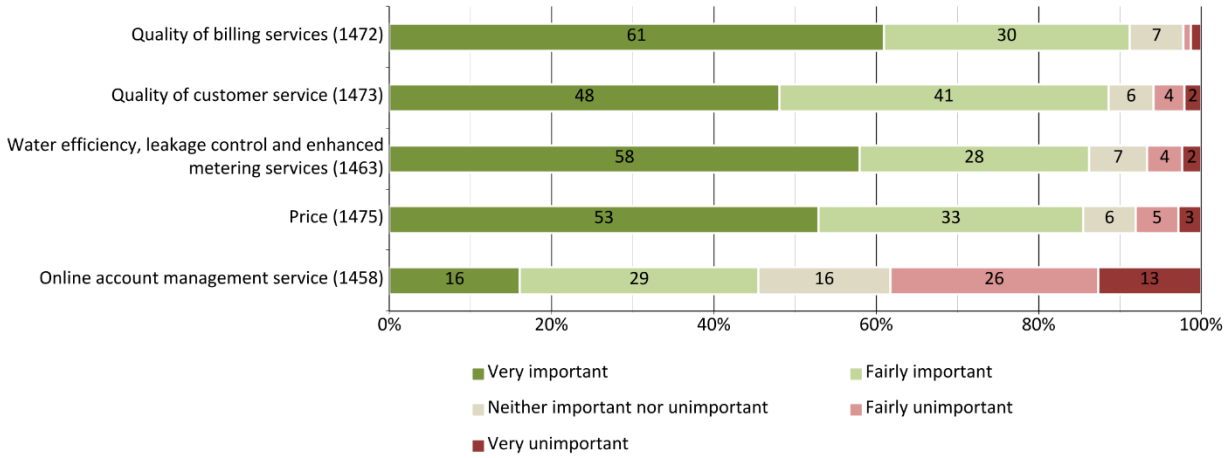
3.39 Active customers were asked if any additional factors were important in their decisions when comparing providers. 13 customers gave additional factors, which included having a named contact at the retailer/an account manager, environmental factors (e.g. assessing whether a retailer had a poor environmental record), the actual switching process itself, quality/transparency of communication and knowledge of who to contact if there are issues.

3.40 Micro organisations were significantly more likely to say the quality of customer service was important to them when comparing providers.

3.41 SMEs were not significantly more likely to say any factor was important in their decision making but were less likely to say a range of factors were important. They were significantly less likely to say that price, quality of customer services, consolidating water and sewerage retailers, consolidating utilities to a single provider, online account management and reputation of the retailers were important factors.

3.42 Large organisations were significantly more likely to think that online account management services; quality of billing services; consolidating multiple premises; and water efficiency, leakage control and enhanced metering services are important factors when comparing retailers. They were significantly less likely to think consolidating different utilities to the same supplier was important.

Figure 19: How important or unimportant are each of the following factors when thinking about your water retail services?



Base: Customers that have not actively considered switching or were not aware they were able to switch (number of respondents shown in brackets)

3.43 Those who haven't actively considered switching retailers (or weren't aware they were able to switch) were asked how important or unimportant a range of factors were in general with regards to their providers. Quality of billing services was rated as important by the highest proportion of customers (91%), while quality of customer service (89%), water efficiency, leakage control and enhanced metering services (86%) and price (85%) were all rated as important by over four fifths of organisations.

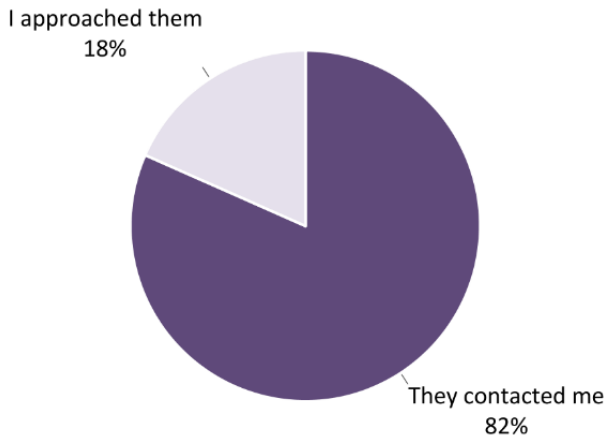
3.44 Again, an online account management service was rated as important by a lower proportion of organisations, with almost two fifths (38%) rating this as unimportant.

3.45 Other factors that were considered important include good service/quality of supplier, good quality/clean water, good repairs service and good communication/being kept updated.

3.46 SMEs and large organisations are less likely to say that water efficiency, leakage control and enhanced metering services are important to them, but SMEs are significantly more likely to say that online account management services are important and large organisations are more likely to say customer service is important.

Intermediaries

Figure 20: Did the broker or consultant you used to search for information about alternative retailers contact you or did you approach them?

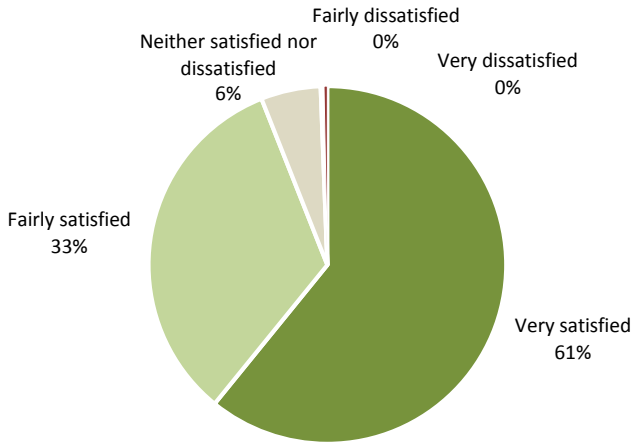


Base: Customers who used a broker or consultant (122)

3.47 Of those who used a broker or consultant to search for information about alternative retailers, over four fifths (82%) were contacted by the broker or consultant, while the remaining 18% approached them themselves.

3.48 SME and large customers were significantly more likely to have approached the broker or consultant, rather than being contacted by them.

Figure 21: How satisfied or dissatisfied were you with your discussions with the broker or use of the price comparison website?



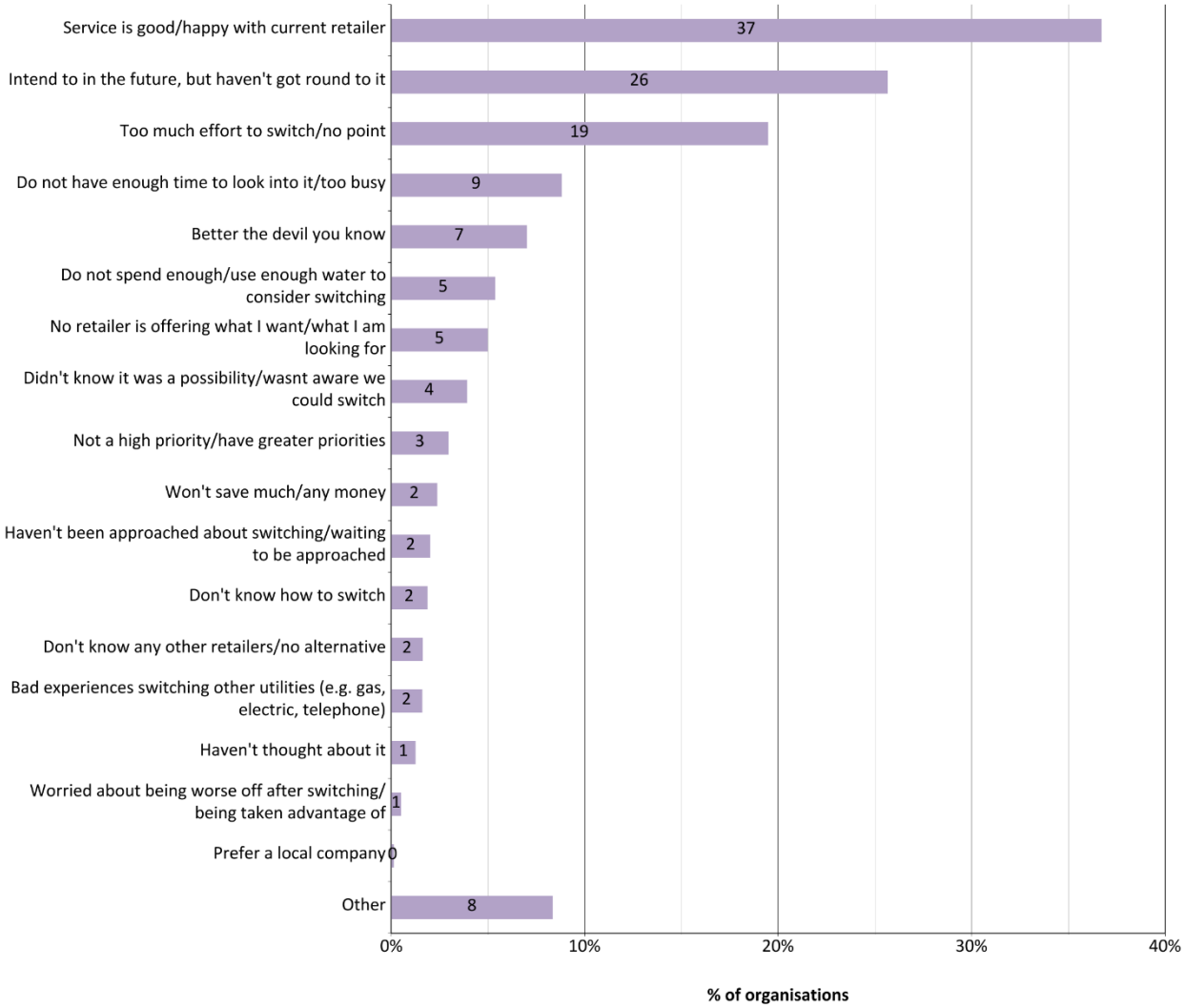
Base: Customers who used a broker, consultant or price comparison website (148)

3.49 The majority (94%) of those who used a broker, consultant or a price comparison website were satisfied with the discussions they had with them/use of the website, with around three fifths (61%) being very satisfied. Only 1% were dissatisfied.

3.50 Reasons given for not being satisfied included that the broker did not get back to them and that they did not give what was perceived to be good or useful advice/help to find any savings. However, it should be remembered that only a very small proportion were not satisfied.

Non-switching Customers

Figure 22: Why have you not considered switching clean water or waste water retailer?

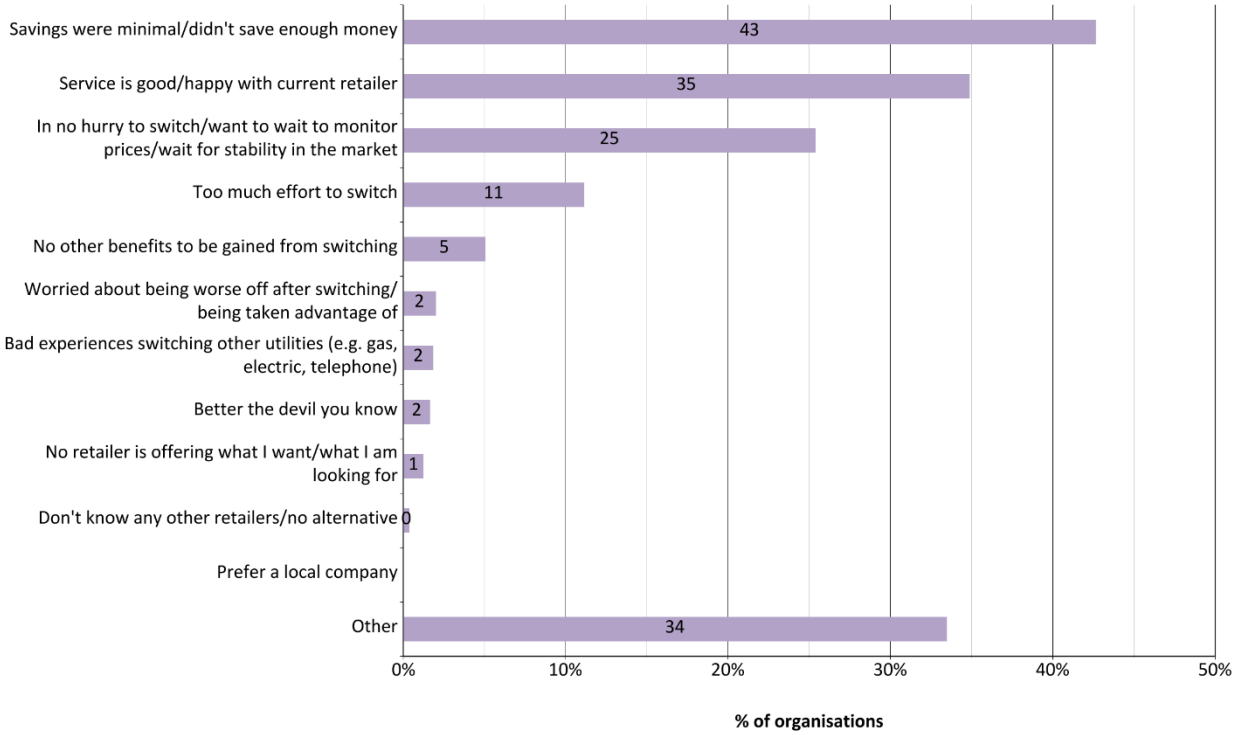


Base: Customers who had not considered switching (883)

3.51 Those who had not considered switching yet (which accounts for 84% of organisations) were asked why they hadn't considered switching. The most frequently given reasons were that the current service is good/happy with current retailer (37%); that they intend to in the future but haven't got around to it yet (26%) and that it's too much effort to switch/no point (19%). Therefore, it seems that perceptions of the time/effort involved in switching and not seeing any advantages in doing so are the main barriers to switching rather than difficulties in searching for or the process of switching.

3.52 SMEs were significantly more likely to say they hadn't considered switching because they don't know any other retailers, that they prefer a local company and that they intend to in future. Large organisations were also significantly more likely to say they intended to in future, but were also significantly more likely to say that there are no retailers offering what they are looking for.

Figure 23: Why did you decide not to switch retailers after considering it?



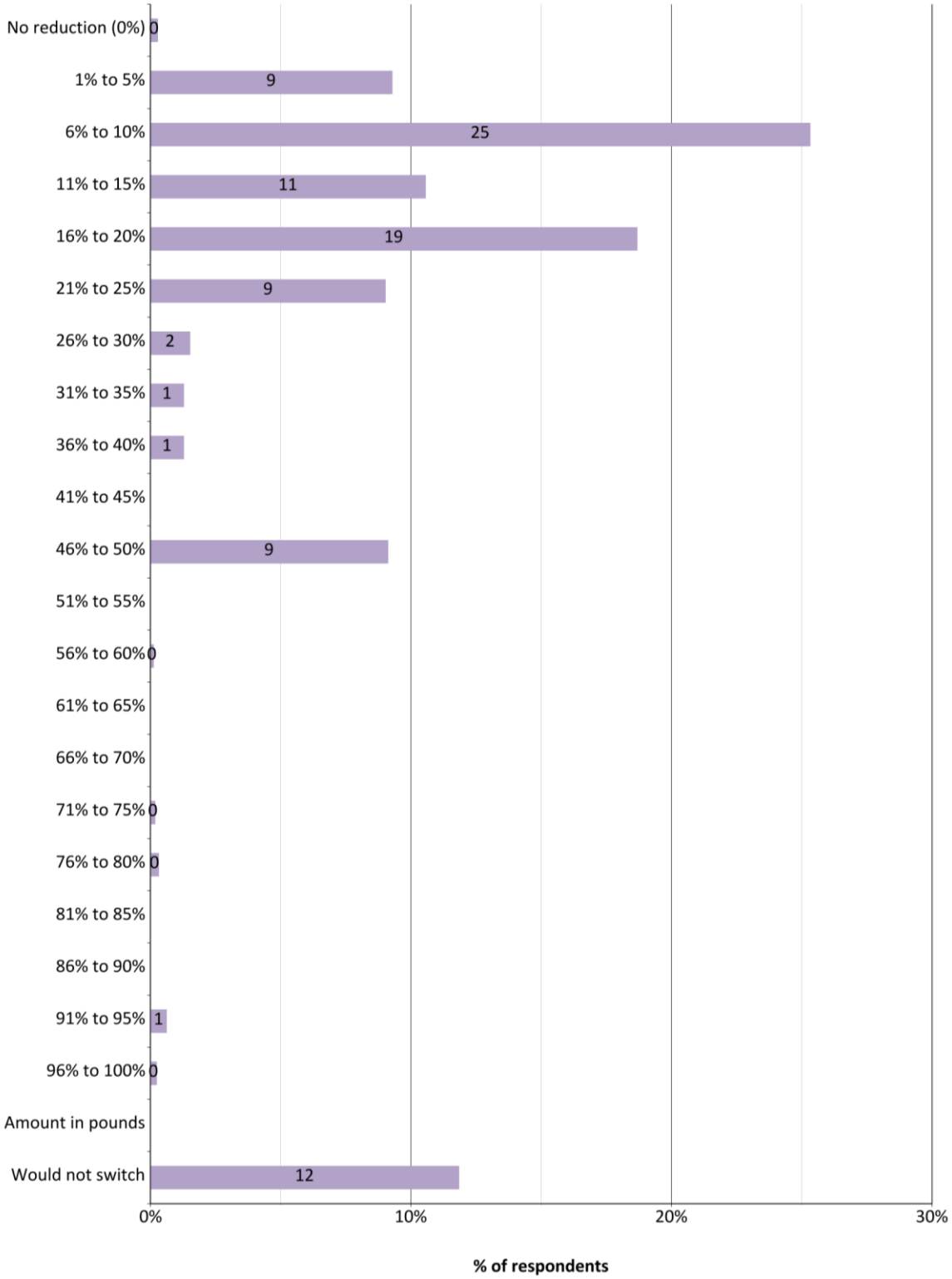
Base: Customers that considered switching but decided not to (78)

3.53 Those who had actively considered switching but had decided not to (which accounts for 5% of organisations) were asked why they decided not to switch retailers after initially considering it. The most frequent responses were that savings were minimal/didn't save enough money (43%) and that the current service is good/happy with current retailer (35%).

3.54 A quarter (25%) of customers suggested that they were in no hurry to switch, or that they planned to wait in order to observe what happens in the market and potentially reconsider in the future. Around one in ten (11%) said that it was too much effort to switch. 14 customers gave other comments; these included issues agreeing to switch with their own internal procurement departments, being advised not to switch by a broker, and because of ongoing disputes with their existing retailers.

3.55 For those who started to switch but said something had stopped it from happening (just 2% of organisations), the reasons for this were varied. However, having issues with communication from either the new or old supplier or between the two was mentioned by several organisations, as well as it generally taking a long time, there not being enough information and that it was too much work.

Figure 24: In percentage terms, what level of annual water bill reduction would encourage you to switch retailer?



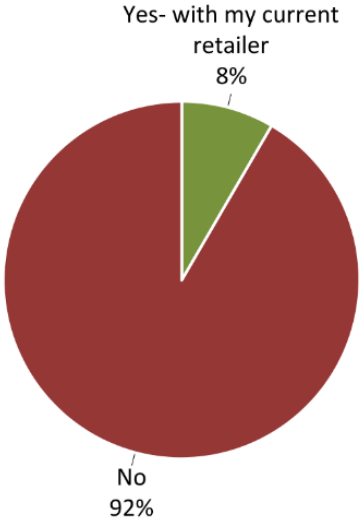
Base: Customers who were aware that they could, but have not switched (915)

3.56 Of those who have not switched, almost three quarters (73%) would switch for a saving of up to 25%, with a further 13% stating they would only switch if they saved been 25% and 50%. However, over 1 in 10 (12%) still would not switch, however much they saved.

3.57 Customers who would switch for a reduction in their annual water bill on average said that this would be a 20% reduction. This figure ranged from 21% among micro businesses to 17% among SMEs and 11% among large organisations.

Renegotiating

Figure 25: Have you attempted to negotiate with your retailer for a better deal on your clean water or waste water since April 2017?



Base: Customers who were aware they could switch retailers or negotiate a new deal from April 2017 (1,191)

3.58 All those who were aware prior to this survey that they could either switch to a new retailer or negotiate a new deal with their existing retailer from April 2017 were asked if they had attempted to negotiate a better deal at all.

3.59 Not including any negotiations made before April 2017, or during the switching process, 8% have attempted to negotiate a better deal with their current supplier. A very small amount (less than 1%) attempted to negotiate a better deal with their previous supplier (if they have now switched). Over 9 in 10 (92%) have not attempted to negotiate a new deal at all.

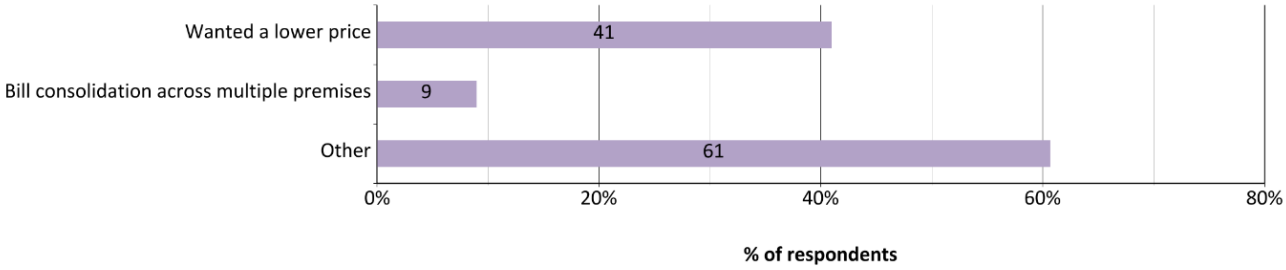
3.60 As can be seen in the figure overleaf, customers in Anglian and Thames water regions, those in transport and storage; business administration; wholesale; and health business sectors, active customers and those not satisfied with their current retailer were significantly more likely to negotiate with their current retailer.

3.61 By contrast, customers in Northumbrian, Severn Trent, South West, United Utilities, Wessex and Yorkshire water regions were significantly less likely to have attempted to renegotiate with their current retailer compared to customers overall. This is also the case with SMEs (10-249 employees), customers in manufacturing; construction; motor trades; retail; accommodation and food; professional, scientific and technical; public administration and defence; and education business sectors, as well as inactive customers (those who plan to consider switching in the next 3 months/further in the future and those who are not interested in switching at all), customers using less than 5,000,000 litres of water a year, and those satisfied with their current retailer.

Figure 26: Have you attempted to negotiate with your retailer for a better deal on your clean water or waste water since April 2017? (Those who answered Yes – with my current retailer)

Base: Customers who were aware they could switch retailers or negotiate a new deal from April 2017 (1,191)

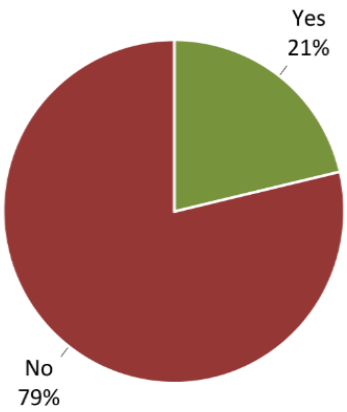
Figure 27: What were your reasons for attempting to renegotiate?



Base: Customers who attempted to renegotiate (80)

3.62 The most frequently given reason for attempting to renegotiate was that they wanted a lower price (41%), followed by bill consolidation across multiple premises (9%). Other reasons were varied and related mostly to individual circumstances. Water efficiency, leakage control and enhanced metering services were either not mentioned at all or by very few.

Figure 28: Did you agree a renegotiated contract with the retailer?



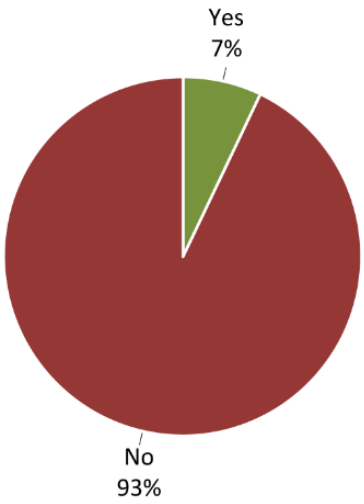
Base: Customers who attempted to renegotiate (69)

3.63 Of those who attempted to renegotiate, only around a fifth (21%) actually agreed a renegotiated contract with the retailer (accounting for less than 2% of all organisations). The main reported benefits from renegotiating was that they made financial savings (41%). Other benefits mentioned include better/simpler/consolidated billing and saving time and effort. Again, water efficiency, leakage control and enhanced metering services were not mentioned indicating that these are not major concerns.

3.64 In terms of financial savings, almost all of those who have renegotiated have experienced (or expect to experience) savings of between 1% and 15%, with no organisation saving over 40%. Almost all those who have made financial savings attributed the saving to a reduced tariff, with around two thirds reporting that they also made savings through water efficiency. One organisation also mentioned that they made savings through bill consolidation as this resulted in reduced rates.

Problems and Complaints

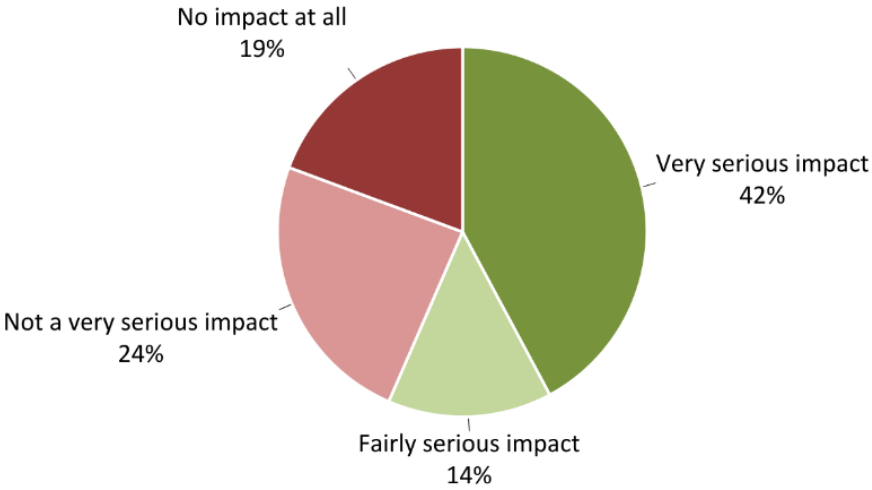
Figure 29: Have you had any problems with clean or waste water services since 1st April 2017?



Base: All Customers (1,748)

3.65 Less than 1 in 10 (7%) have experienced any problems with their clean or waste water services since 1st April 2017. Over three fifths (61%) of problems related to a repairs or problems with water leaks, quality of water or similar, while around a third (34%) related to billing issues.

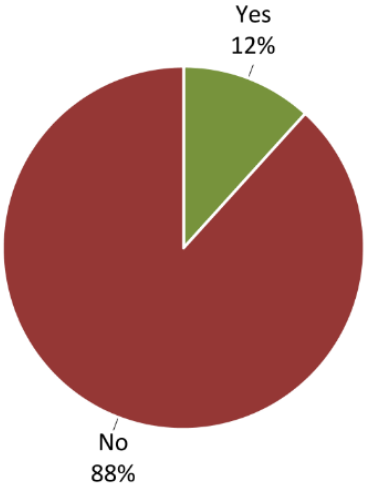
Figure 30: How serious an impact did these problems have on your business?



Base: Customers that have experienced any problems with their clean or waste water services (148)

3.66 Over half of the problems experienced had at least a fairly serious impact on the business, with over two fifths (42%) saying that there was a very serious impact. However, around a fifth reported that the problem had no impact at all. Active consumers were significantly more likely to have experienced problems and for those problems to have had a serious impact on their business.

Figure 31: Since April 2017, have you made a complaint about your clean water or waste water services?



Base: Customers that have had any problems with their clean or waste water (238)

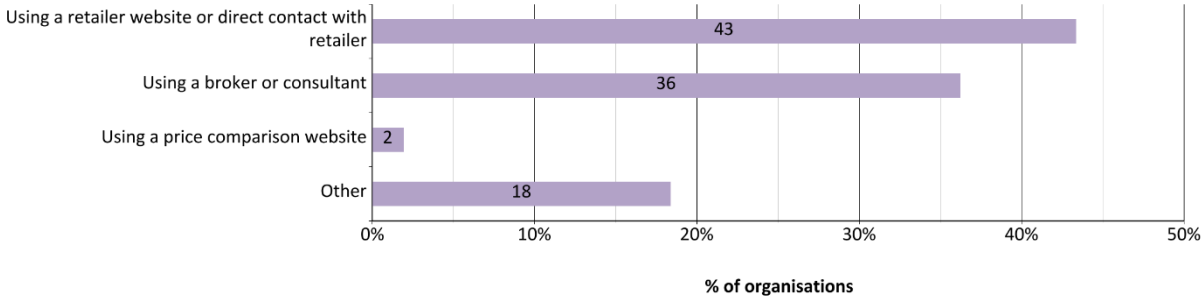
3.67 Just over 1 in 10 (12%) of those who have experienced any problems with their clean or waste water since April 2017 have made a complaint about their clean or waste water services within this period. Over three fifths (64%) of complaints related to repairs or problems, for example water leaks or quality of water, while almost a fifth (18%) related to billing issues.

Switching

3.68 Less than 1 in 10 (9%) customers had switched supplier or at least started the process of switching.

3.69 The following charts and associated discussion are based on the responses from the small proportion of customers who, at the point of the 2017 survey, had at least started the switching process. Owing to the small sample size (68 organisations) the results below, while useful for illustrating the experience of switchers, should not be used to draw conclusions about the wider population, and a greater weight should be placed on the larger sample of switchers interviewed during Wave 2. The results from Wave 2 are discussed in chapter 4.

Figure 32: How did you arrange the switch?

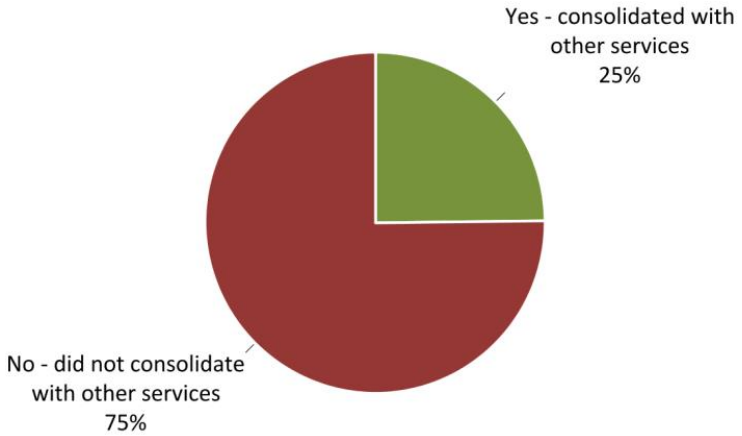


Base: Customers that switched or tried to switch (64)

3.70 Of those who switched (including those who started to switch but something prevented it from happening), around two fifths (43%) arranged the switch via a retailer's website or contacted the new retailer directly, while a further 36% used a broker or consultant. Other means mentioned include using a search engine (without recalling whether this was a retailer's or price comparison's website), and being contacted by retailers.

3.71 Around half (48%) of those who decided to switch, did so solely because in order to save money. Others made the decision based on multiple factors, including cost, but also to consolidate bills and suppliers and to make the process simpler.

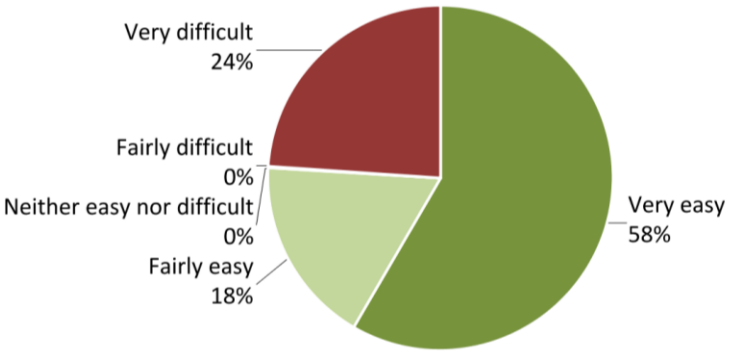
Figure 33: Have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas so that they are provided by the same retailer?



Base: Customers who switched or tried to switch (68)

3.72 Of the small number of switchers in the survey of all non-household customers (68), a quarter (25%) of those who decided to switch indicated they had consolidated their water retail services with their other utilities, such as electric, telephone or gas so that they are provided by the same retailer. This contrasts with the results for Wave 2 where 1,399 switchers were asked the same question and only 6% of switchers reported consolidating their water retail services with other utilities.

Figure 34: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?



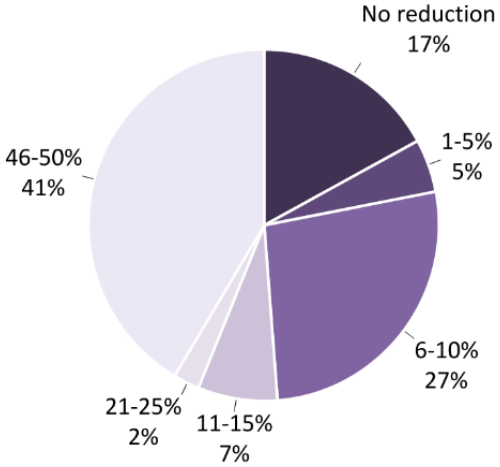
Base: Customers who switched or tried to switch (62)

3.73 Once they had actually chosen the retailer they wanted to switch to, over three quarters (76%) found the actual process of switching easy, with 58% finding it very easy.

3.74 However, almost all of those who did not find it easy, found it very difficult (24%). In total, 7 of the 62 switchers or attempted switchers found the process difficult. When asked why this was, reasons given included poor communication between old and new retailers; poor quality/frequency of communication/information given; that it took too long to switch/close off the old account; the length of time it took to settle final bills and that the process was generally complicated.

Savings by Switching

Figure 35: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer?

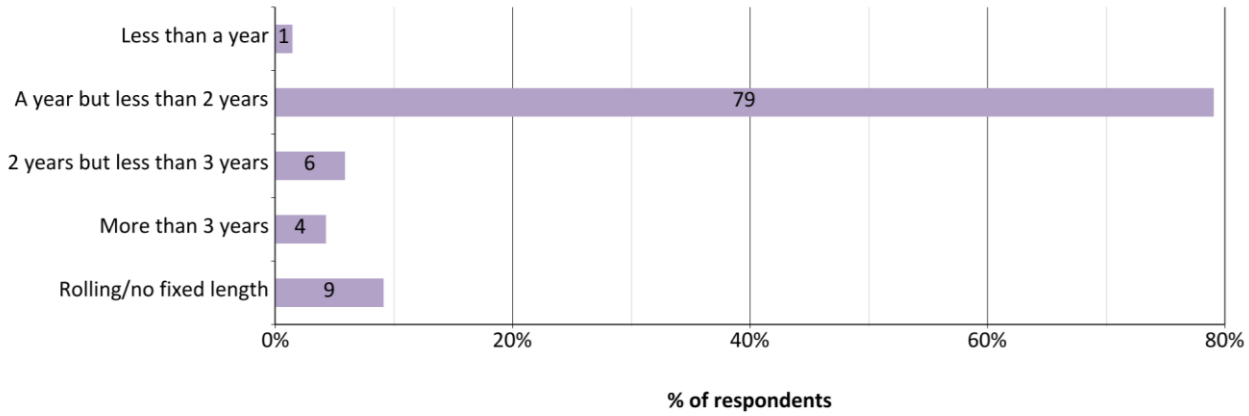


Base: Customers who have switched (41)

3.75 Those who have switched were asked, in percentage terms, roughly how much their water bills have (or expect to have) reduced by since making the switch. Around two fifths (41%) report that their bills have reduced by between 46% and 50%; however almost half (49%) report savings of 10% or less, with 17% reporting that there has been no reduction in their water bills.

3.76 All (100%) of those who saw a reduction in their water bill reported that this was at least partly due to a lower tariff, while around 1 in 5 (19%) also reported savings owing to water efficiency. For those who have made savings through both a reduced tariff and water efficiency, over four fifths (86%) report that the reduction in tariff accounts for 96-100% of the overall saving.

Figure 36: What is the total length of your contract with your new retailer?



Base: Customers who have switched (47)

3.77 Around four fifths (79%) of those who have switched suppliers has entered into a contract of at least a year, but less than 2 years, while for 9% the contract is rolling/not fixed term. Only 1 in 10 (10%) have entered contracts lasting 2 years or more.

4. Survey of Market Switchers

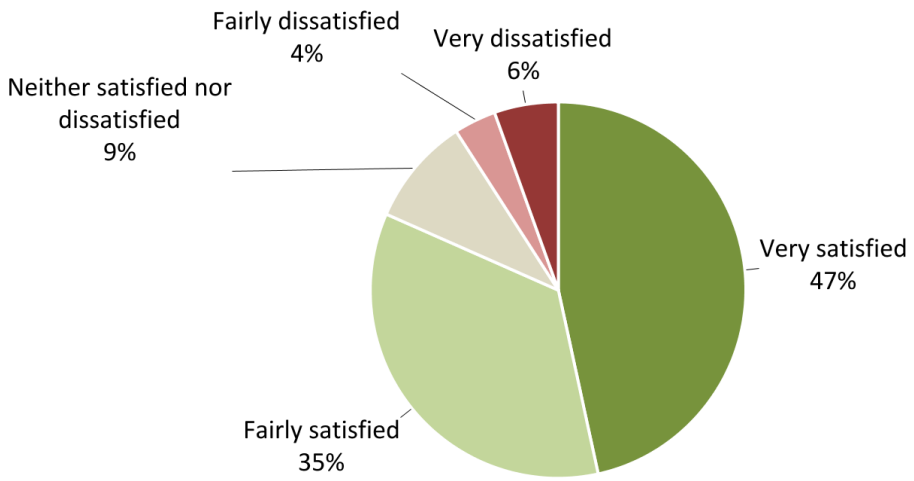
Results from Quantitative Telephone Survey

4.1 Once they had confirmed that they had switched retailers, respondents were asked a series of questions about their satisfaction with their current retailer; their experience searching for and comparing retailers; the interactions they'd had with intermediaries; the experience of, and benefits from, switching retailer; and any problems they had experienced. Customers with sites in Scotland were also asked questions about their experiences with the Scottish market compared to the English market.

4.2 The responses to these questions are set out below.

Overall Satisfaction

Figure 37: Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)...?

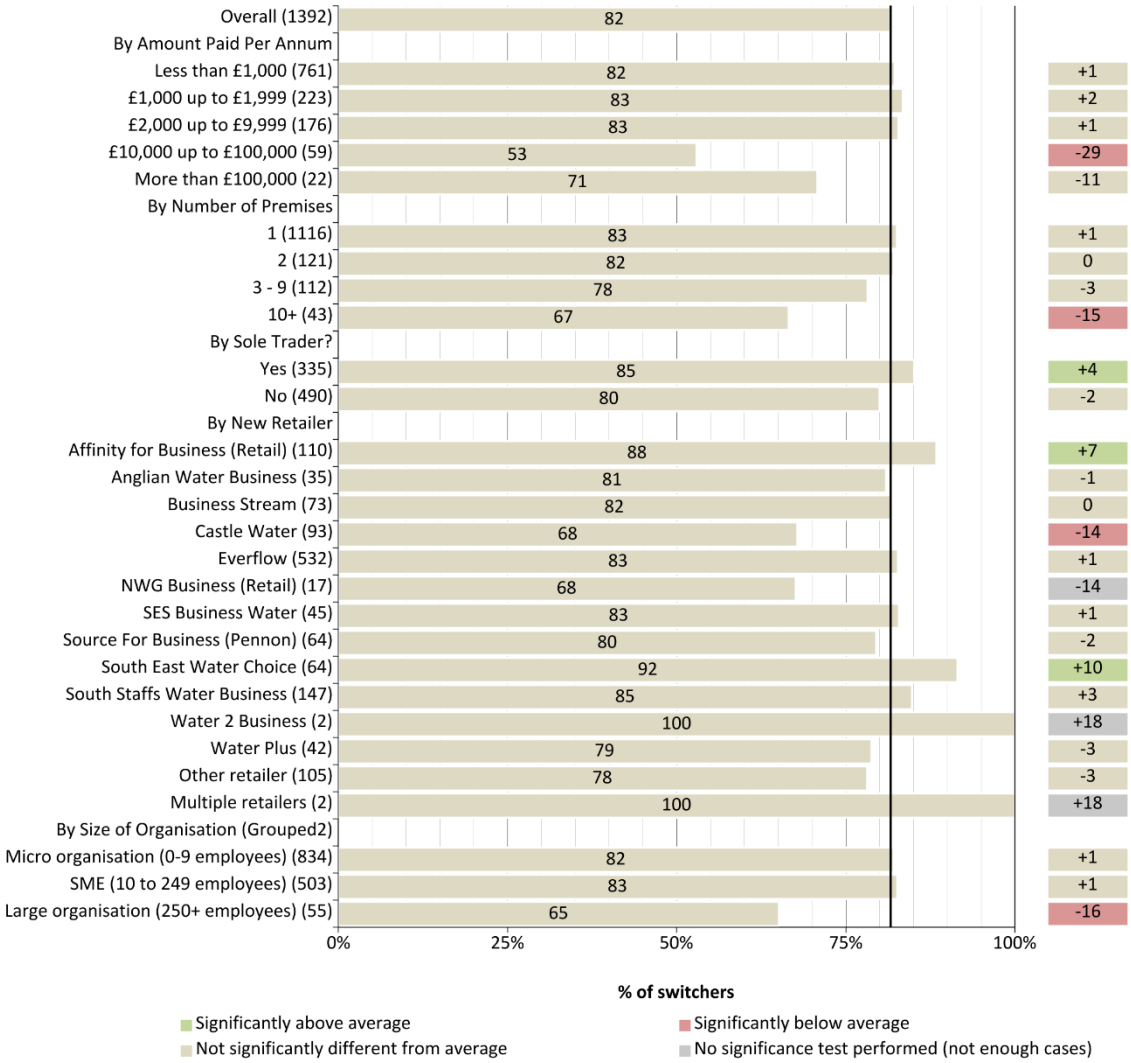


Base: All Switchers (1,392)

4.3 Switchers were asked overall how satisfied or dissatisfied they are with their current clean water and waste water retailer(s). Just over four fifths (82%) are satisfied with their current supplier(s), with only 9% saying they are dissatisfied. Satisfaction is significantly higher among switchers compared to all non-household customers (77%).

4.4 The figure overleaf shows how levels of overall satisfaction with water and waste water retailers vary by sub-group.

Figure 38: Overall, how satisfied or dissatisfied are you with your current water retail services and waste water retailer(s)?



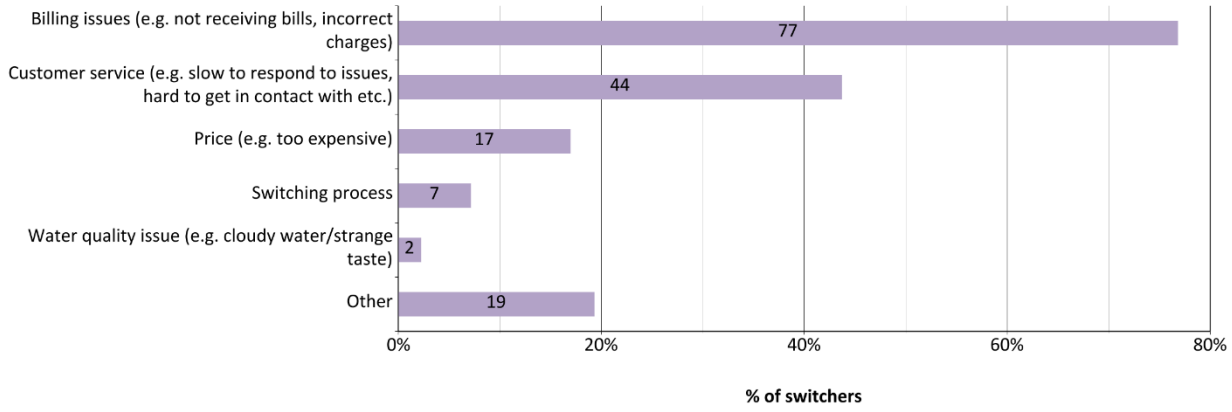
Base: All Switchers (number of respondents shown in brackets)

4.5 Customers who switched to Affinity for Business and South East Water Choice reported significantly higher satisfaction with their current retailer, as did micro organisations that were sole traders.

4.6 Conversely, large customers (250 employees or more), those spending £10,000-£100,000 (and to a lesser extent, those spending £10,000+) annually on their water bills, customers with 10 or more premises and those who switched to Castle Water expressed significantly lower satisfaction. Information & communication sector customers were also significantly more likely to be satisfied compared to average.

4.7 There were no statistical differences in satisfaction by water region.

Figure 39: Why were you dissatisfied?



Base: Switchers who were dissatisfied (127)

4.8 Switchers who said they were dissatisfied with their current retailer were asked why this was.

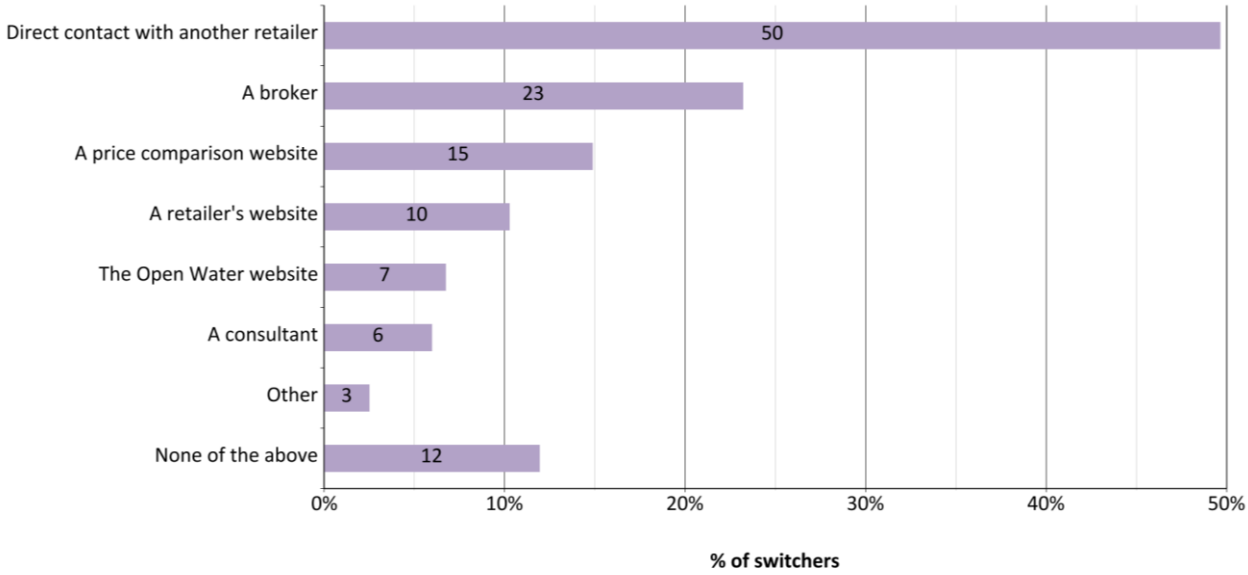
4.9 The most frequent reason for dissatisfaction was billing issues, for example not receiving bills or being charged incorrectly (77%), followed by customer service problems, such as the retailer being slow to respond to issues or being hard to get in touch with etc. (44%). Price was a reason for dissatisfaction among nearly a fifth of respondents (17%), and water quality issues (2%) were also mentioned.

4.10 7% of customers mentioned problems with the switching process itself, e.g. poor communication between retailers when arranging the switch, unreliable information given about switch dates, switches not having been fully completed; and new retailers having issues with meters (can't find them/trying to bill for two meters).

4.11 Of the 'other' reasons for dissatisfaction, these varied but included issues such as stoppage in water supply, leaks, a lack of updates/communication and being contacted too frequently by the new retailer.

Searching and comparing

Figure 40: Which of the following have you used to search for information about alternative retailers?



Base: All Switchers (1363)

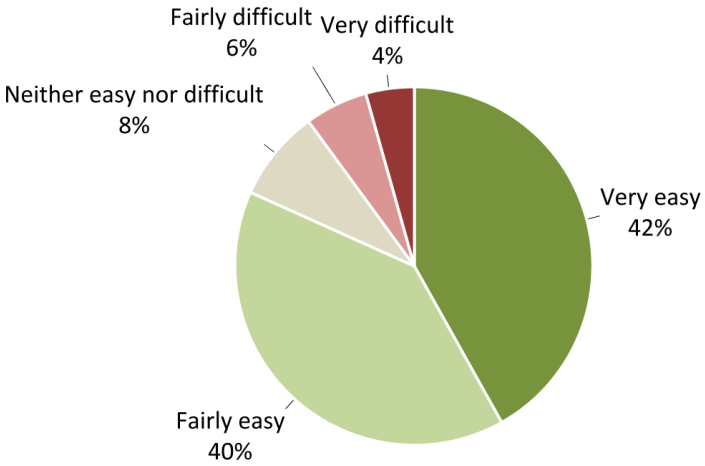
4.12 Half of respondents (50%) said that they have had direct contact with another retailer to find out information, and a further 10% said that they had gone to a retailer's website when searching for information.

4.13 Almost a quarter (23%) had used a broker to look for information on their behalf, with 6% using a consultant for this purpose.

4.14 15% said they had used a price comparison website. One price comparison website identified specifically was 'Utility Wise'.

4.15 Customers that were satisfied with their current retailer were significantly more likely to have used a price comparison website or direct contact with retailers, while customers that were not satisfied were more likely not to have used any of the above methods of searching for information.

Figure 41: How easy or difficult was it for you to find the information you needed?



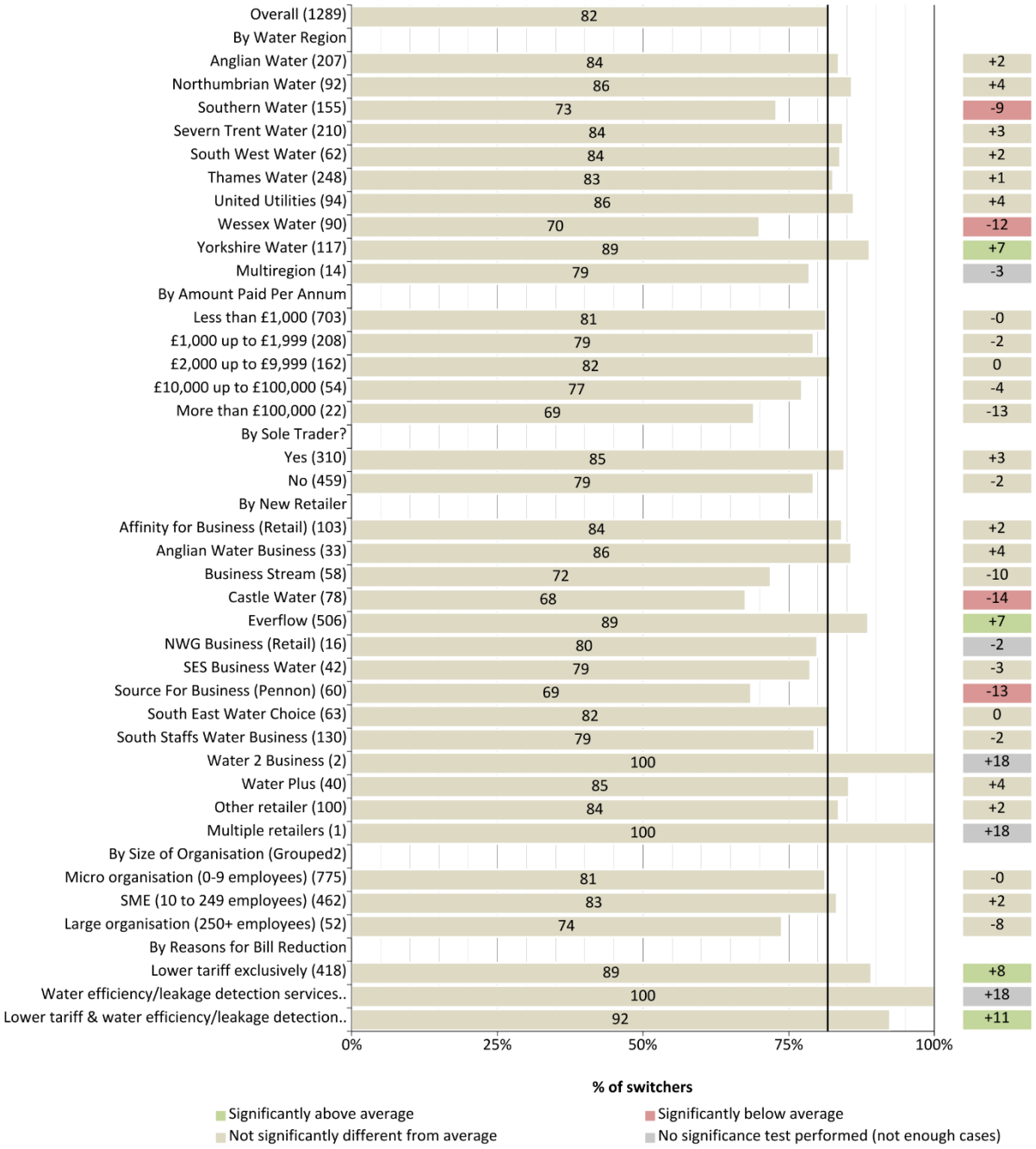
Base: All Switchers (1289)

4.16 More than four fifths of respondents (82%) said it was easy to find the information they needed, while only 1 in 10 (10%) found this hard.

4.17 Respondents who said they found it difficult to find the information they needed were significantly more likely to have used a retailer's website or the Open Water website. Meanwhile, those who said they found information easily were significantly more likely to have used a price comparison website or a broker.

4.18 Respondents who found it easy to find the information they needed were significantly more likely to say they were satisfied with their current retailer overall.

Figure 42: How easy or difficult was it for you to find the information you needed?



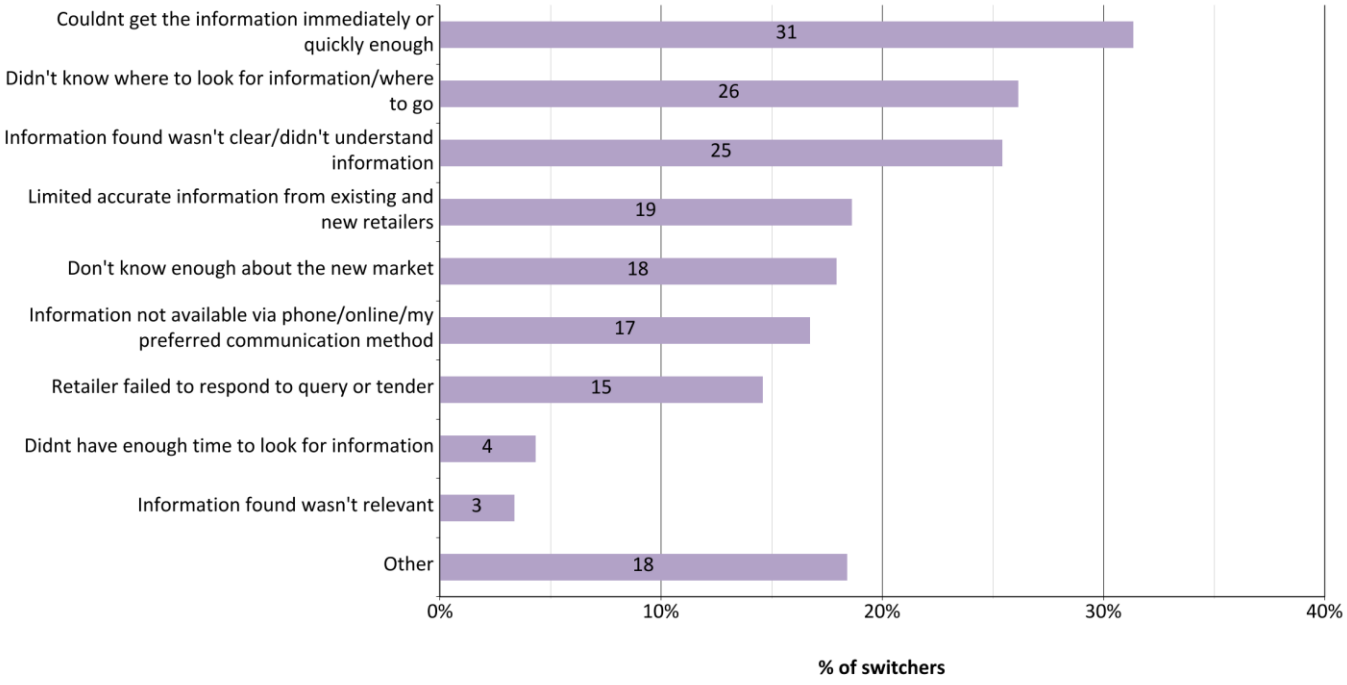
Base: All Switchers (number of respondents shown in brackets)

4.19 Respondents from Southern Water and Wessex Water regions were significantly less likely to say they found information easily, while those in the Yorkshire water region were more likely to say this was easy.

4.20 Those respondents who switched to Castle Water and Source for Business retailers were also significantly less likely to say they found information easily, while those who switched to Everflow were more likely to do so.

4.21 Those who had their bills reduced due to lower tariffs, and especially those who had bills reduced due to both lower tariffs and water efficiency/leakage detection were more likely to say they experienced finding the information they needed easy. Meanwhile those who said they found the process difficult were significantly more likely to have experienced (or expected) no reduction in their bills since switching retailer.

Figure 43: Why was this difficult?



Base: Switchers who said it was difficult to find the information they needed (124)

4.22 Problems with both the availability and quality of information were common comments from respondents when asked why it was difficult to find the information.

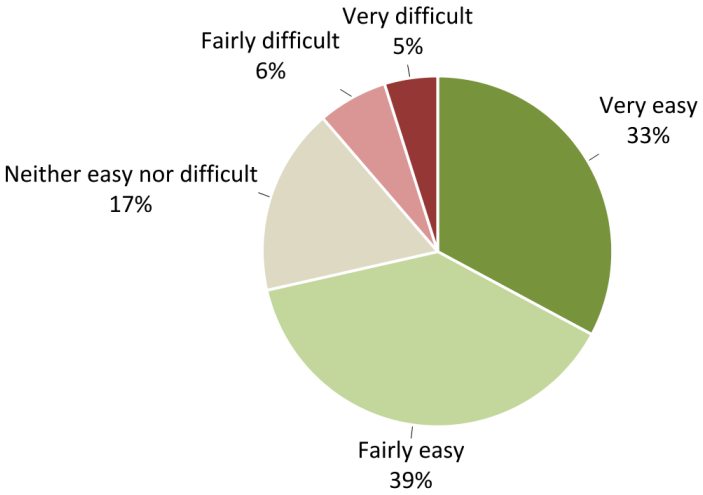
4.23 Of the respondents who said it was difficult to find the information they needed, around 3 in 10 (31%) said this was because they couldn't get the information immediately or quickly enough. Around a quarter said they didn't know where to look for information (26%), and that the information that was found wasn't clear or understandable (25%).

4.24 Nearly a fifth (19%) indicated that they received limited accurate information from existing or new retailers, while a similar proportion (18%) indicated they weren't confident they knew enough about the new market when they were searching for information.

4.25 Only a small proportion of respondents suggested the reason was to do with a lack of time on their part to look for information (4%).

4.26 18% of respondents gave highly specific reasons they found searching for information difficult. These included, among others: difficulties making comparisons between retailers because of inconsistencies with tariff rates/different packages on offer; because the organisation had highly complex water needs; and problems identifying their current retailers.

Figure 44: How easy or difficult was it to compare different retailers?

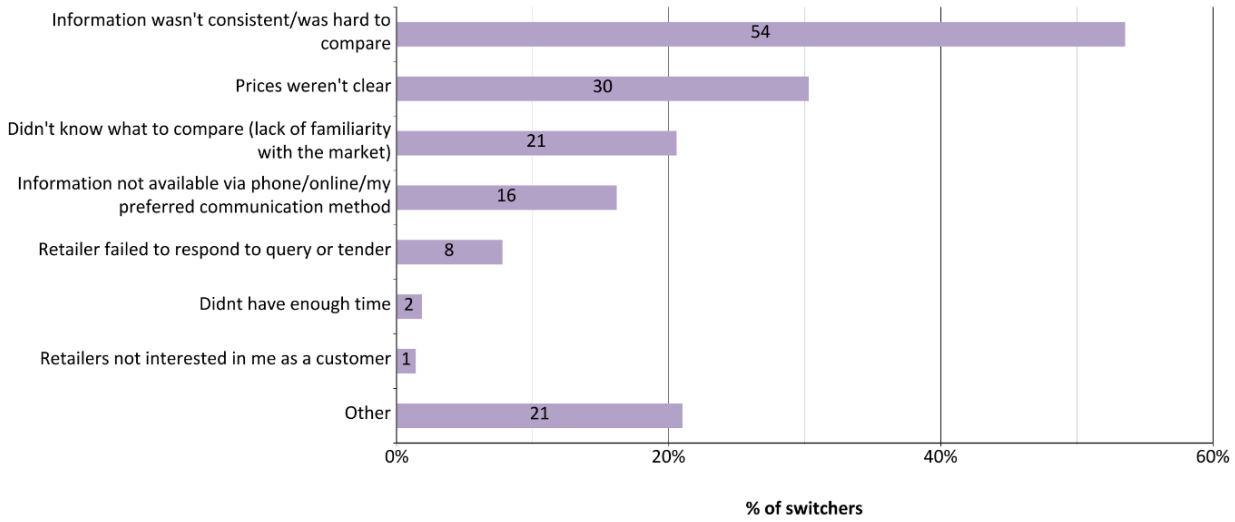


Base: All Switchers (1054)

4.27 Around 7 in 10 switchers (71%) said it was easy to compare retailers. Around 1 in 10 (11%) said they found this difficult, a similar proportion to those that found it difficult to find information generally.

4.28 Switchers from the Southern Water region (and whose old retailer was Business Stream) were significantly more likely to say they found the process difficult. Meanwhile switchers who were in the Yorkshire Water region (and whose old retailer had been Yorkshire Water), were significantly more likely to say they found this easy, as were those whose old retailer had been South Staffs Waters Business. Customers who ended up switching to Everflow and Water Plus were also significantly more likely to say they found comparing retailers easy.

Figure 45: Why was this difficult?

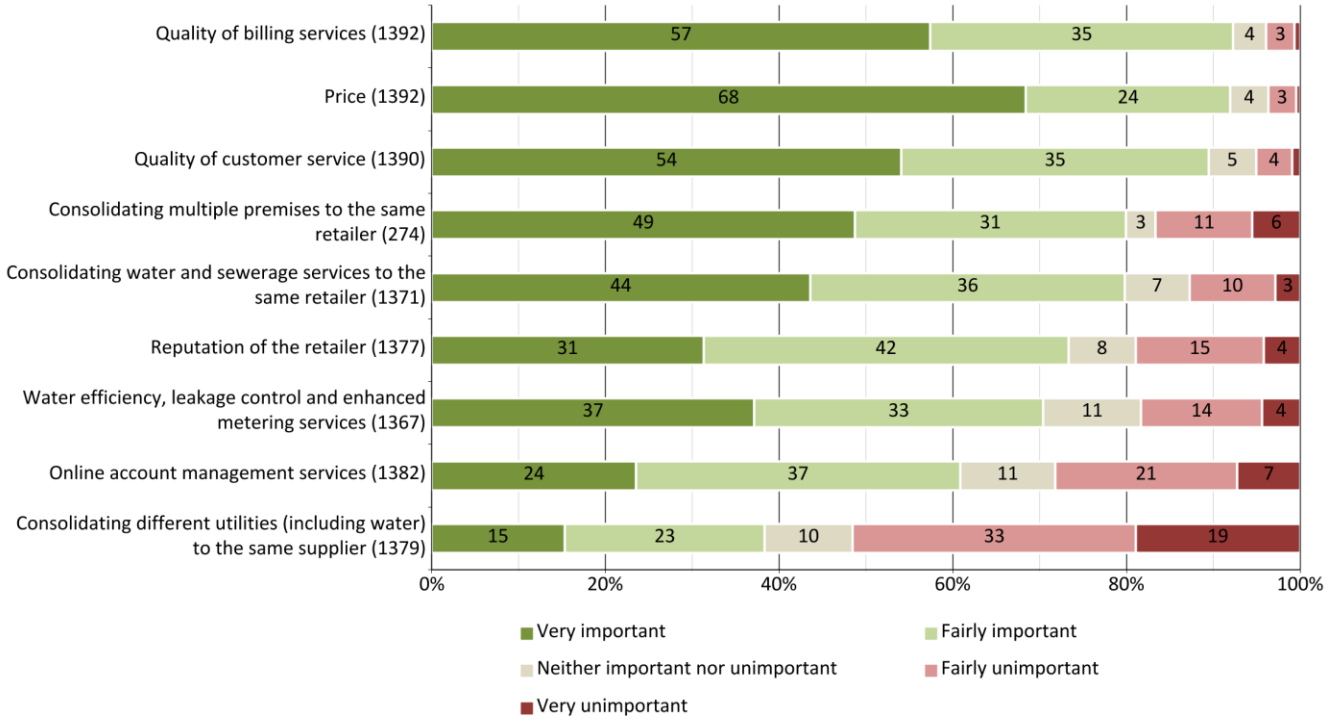


Base: Switchers who found comparing retailers difficult (112)

4.29 More than half (54%) of those that found comparing different retailers difficult said they did so because of issues with the consistency of information, e.g. that different units of measurement were being used in quotations. 3 in 10 (30%) claimed the prices they were quoted were unclear. Around a fifth (21%) said they didn't know what to compare, or that they lacked familiarity with the market.

4.30 Of the customers who gave additional reasons for finding the comparison of retailers difficult (21%), these answered varied, but included experiences such as difficulties getting information from their original retailer, having to supply too much information to a prospective retailer to receive a quote, too few different retailers to compare between, issues with brokers (including knowing whether brokers who contacted them were genuine/giving honest information).

Figure 46: How important or unimportant were each of the following factors in your decisions when comparing providers?



Base: All Switchers (number of respondents shown in brackets)

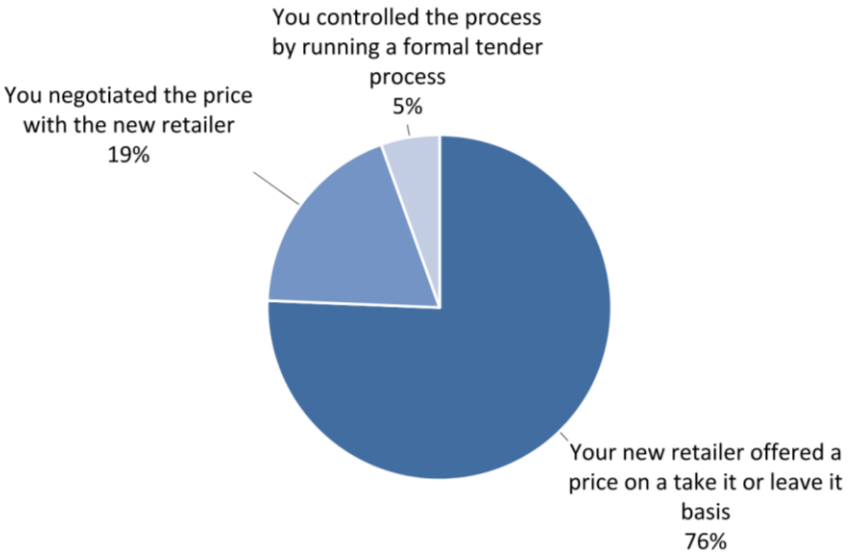
4.31 While quality of billing services (92%) and price (92%) were both perceived as the most important factors in customers' decisions when comparing retailers, more customers perceived price as 'very important' (68%) compared to quality of billing services (57%).

4.32 Quality of customer service was also perceived to be a highly important factor in decision making, with around 9 in 10 (89%) saying this factor was important in their decisions.

4.33 To respondents with multiple premises, the consolidation of several premises to a single retailer was also perceived as being important by four fifths of switchers (80%). Customers with 10 or more premises were significantly more likely to say this factor was important in their decision making.

4.34 Online account management (61%) and consolidating utilities (including water) to the same supplier (38%) were the least important factors in decision making overall. However, micro organisations, sole traders and single site customers were significantly more likely to say this was important than switchers generally.

Figure 47: Which of the following best describes your experience of agreeing a price with your new retailer?



Base: All Switchers (1269)

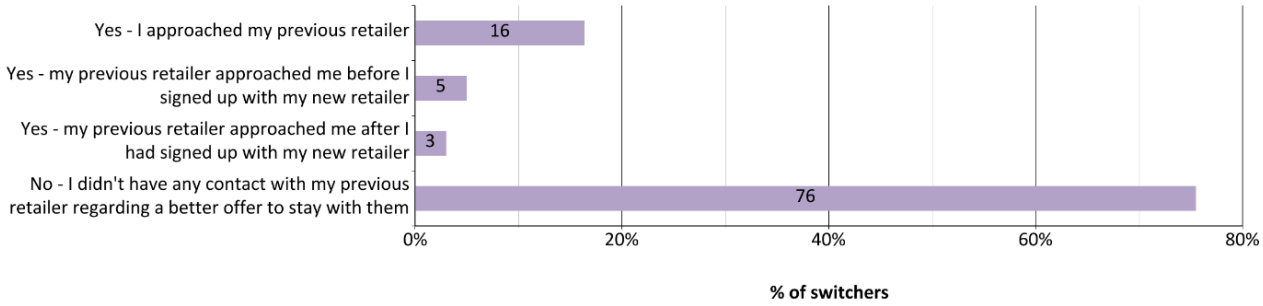
4.35 For the most part, retailers offered prices on a take it or leave it basis (76%), with around a fifth of switchers having negotiated prices with their new retailer (19%). 1 in 20 (5%) ran a formal tender process.

4.36 Customers with higher water bills (£10,000+ annually) and large customers (250+ employees), and those with a large number of premises (10+) are significantly more likely to run formal tenders, while micro businesses (0-9 employees), and customers with small water bills (<£1000 annually) were more likely to agree a price on a take it or leave it basis.

4.37 Customers that switched to Castle Water and Business stream were significantly more likely to say they agreed a price on a take it or leave it basis, while the collective category of 'other' retailers – those retailers with comparatively smaller numbers of switchers – were significantly more likely to negotiate with their customers.

4.38 Switchers who negotiated a price with the new retailers were significantly more likely to say they were satisfied with their current retailer, while those who were offered a price on a take it or leave it basis were significantly more likely to be dissatisfied with their retailer.

Figure 48: Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal?



Base: All Switchers (1334)

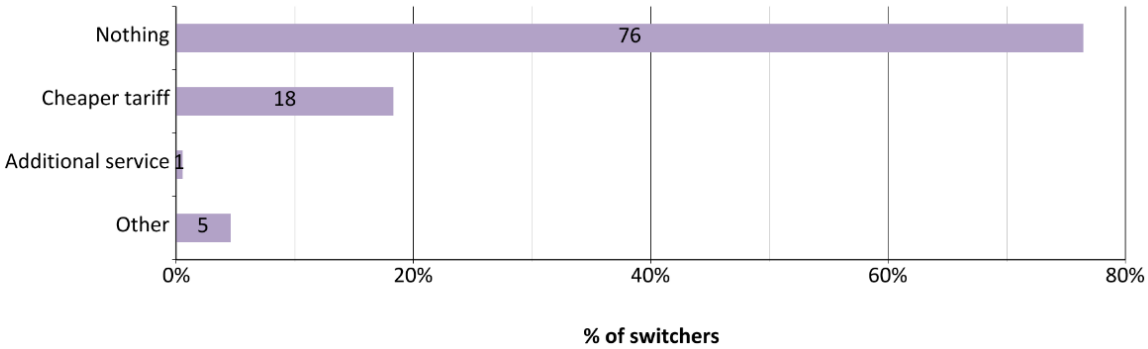
4.39 While the majority of switchers have had no contact with their previous retailer prior to signing up with their new retailer (76%), around 1 in 6 (16%) had pro-actively approached their retailer about the possibility of a better deal. Only 1 in 20 (5%) were contacted by their old retailer before signing up to their new retailer, and a smaller number (3%) were approached after already having agreed to switch.

4.40 Those customers whose previous retailer had been Anglian Water Business were significantly more likely to say that their previous retailer had contacted them prior to signing up with a new one.

4.41 Those who said they had been offered a price on a take it or leave it basis by their new retailer were significantly more likely to have had no contact with their old retailer about the possibility of a better deal. Both those who negotiated a price with the new retailer and those who said they ran a formal tender process were more likely to have approached their retailer about the possibility of a better deal.

4.42 Switchers were significantly more likely to say they were satisfied with their new retailer if they had approached their previous retailer about the possibility of switch before signing up with their new retailer.

Figure 49: What, if anything, did your previous retailer offer you to encourage you to stay?



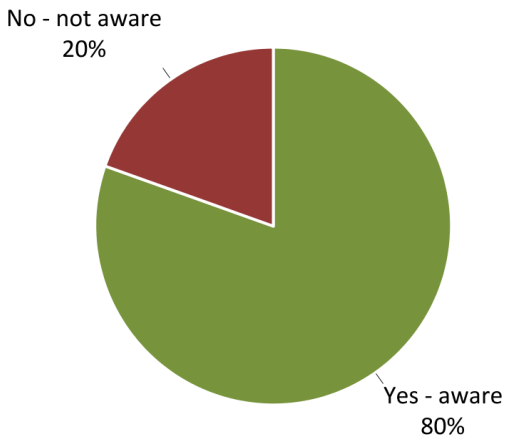
Base: Switchers whose previous retailers had contacted them (298)

4.43 Despite having had contact with their previous retailer either before or after the switch, around three quarters (76%) said that their previous retailer hadn't offered them any kind of deal to encourage them to stay. Around a fifth (18%) said they had been offered a cheaper tariff, and a small minority (1%) said they were offered an additional service to encourage them to stay.

4.44 5% of those who had been in contact with their previous retailer said that they had been offered something other than a cheaper tariff or additional service. These offers included bill consolidation, being given a dedicated account manager, fixed tariffs for a set period/for the long term, incentive payments to stay, and offers to match the new retailer's deal.

Intermediaries

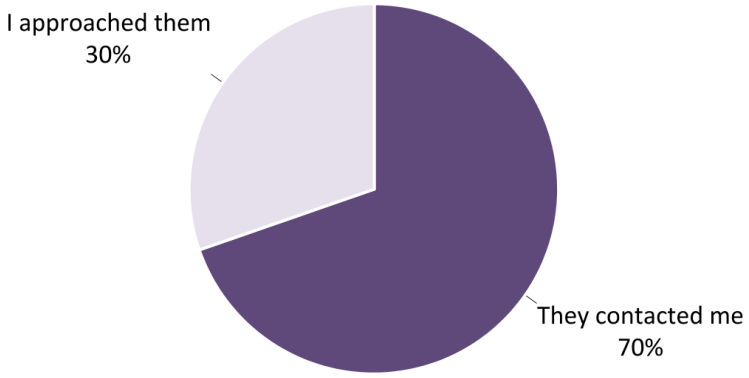
Figure 50: Are you aware that intermediaries such as brokers and price comparison websites can help you compare the different opportunities in the water retail market?



Base: All Switchers (1398)

4.45 Four fifths of respondents (80%) were aware of the role of intermediaries in comparing opportunities in the water market, while only a fifth (20%) were unaware. Micro businesses and those who spent less than £1000 a year on their water bill were less likely to be aware of the role of intermediaries.

Figure 51: Did the broker or consultant you used to search for information about alternative retailers contact you or did you approach them?

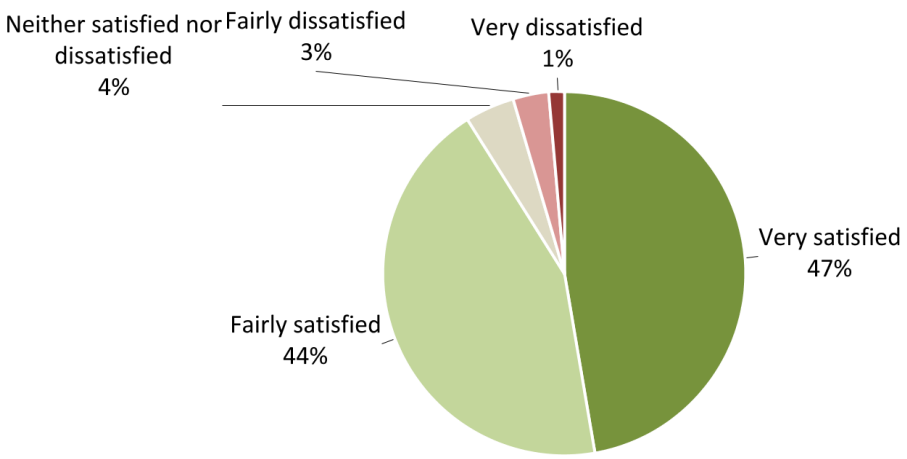


Base: Switchers who used brokers or consultants (430)

4.46 Of switchers who indicated they had been in contact with a broker or consultant when searching for information about alternative retailers, 7 in 10 (70%) said they had been contacted by the broker or consultant, compared to 3 in 10 (30%) who had approached the retailers themselves.

4.47 Micro organisations were significantly more likely to have been contacted by the broker or consultant they used, as were those spending less than £1,000 on their water annually. Customers who switched to Everflow were also significantly more likely to have been contacted by a broker or consultant, rather than having approached them.

Figure 52: How satisfied or dissatisfied were you with your discussions with the broker and/or use of a price comparison website?



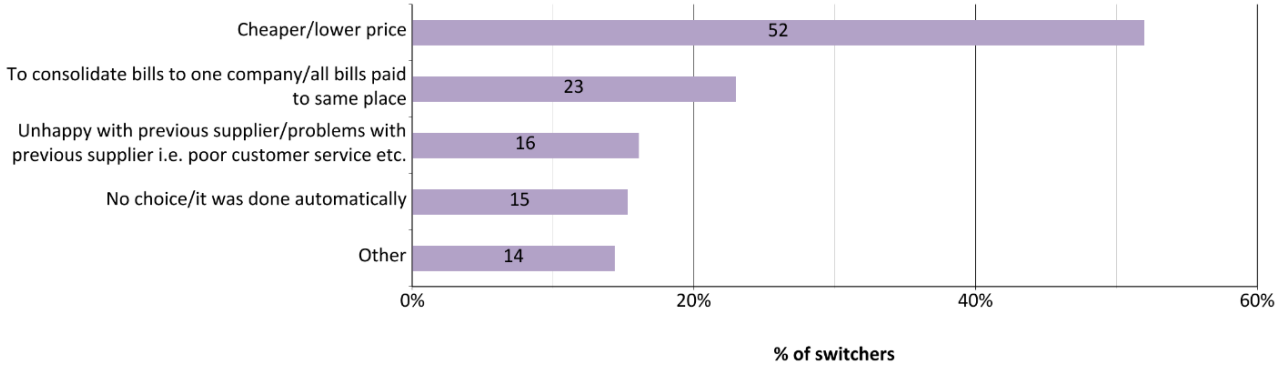
Base: Switchers who used brokers or consultants (573)

4.48 9 in 10 (91%) switchers who used brokers or consultants were very (47%) or fairly (44%) satisfied with the discussions they had with them and/or use of a price comparison website. Just 5% were dissatisfied.

4.49 There were no significant differences between switchers who had contacted brokers/consultants themselves and those who had been contacted by brokers/consultants. However, customers who used consultants specifically were significantly more likely to be satisfied.

Switching Retailers

Figure 53: Why did you decide to switch retailer?



Base: All Switchers (1368)

4.50 While 92% of respondents earlier said that price was important to them when searching and comparing retailers, only around half of respondents (52%) said they decided to switch for cheaper bills – the most common reason for switching. Nearly a quarter (23%) of switchers said they switched to consolidate their bills to a single retailer, while 16% stated they were unhappy with their previous supplier or had experienced problems with them.

4.51 The word cloud below demonstrates the most frequently occurring words in customer's responses to why they decided to switch retailers.

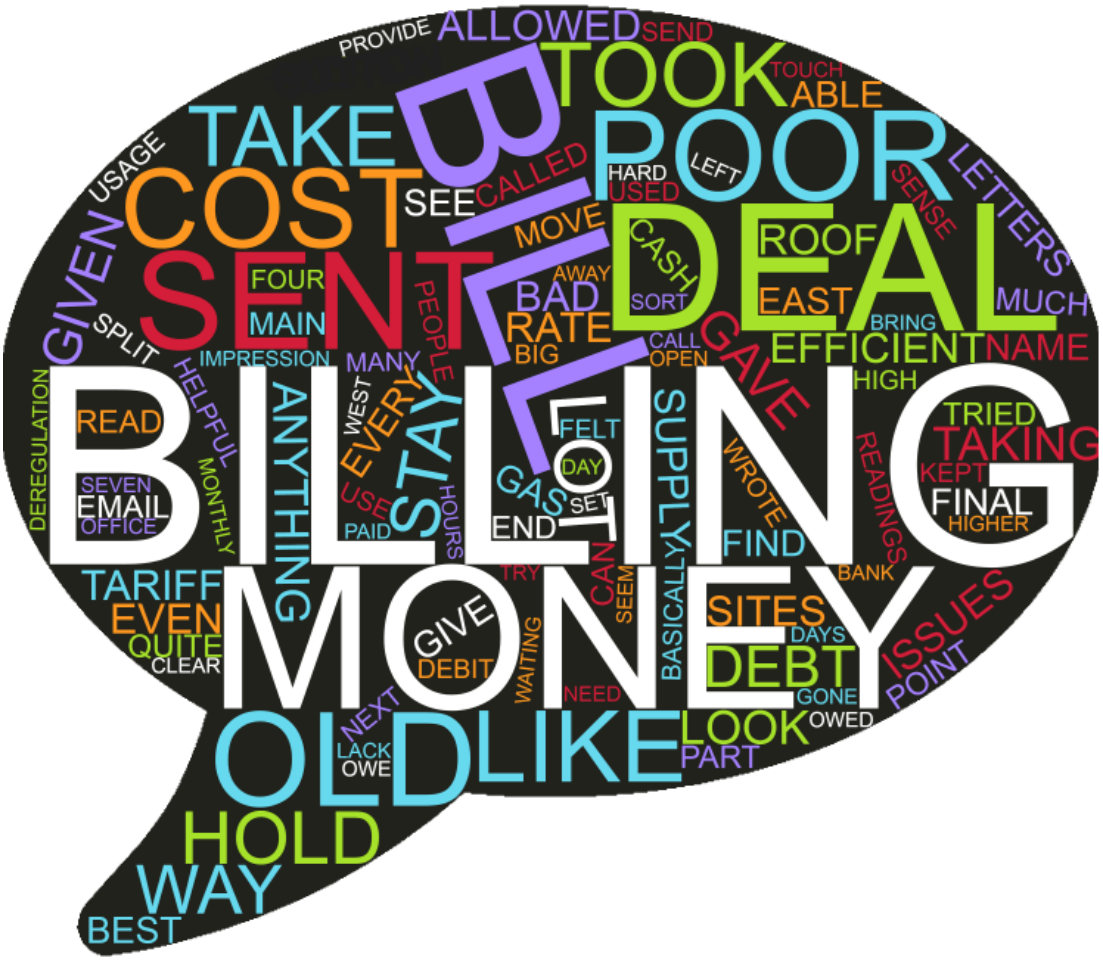
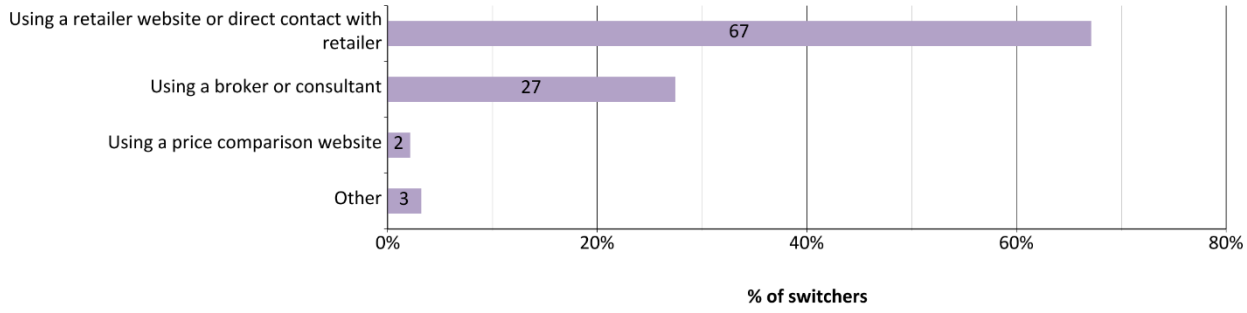


Figure 54: How did you arrange the switch?

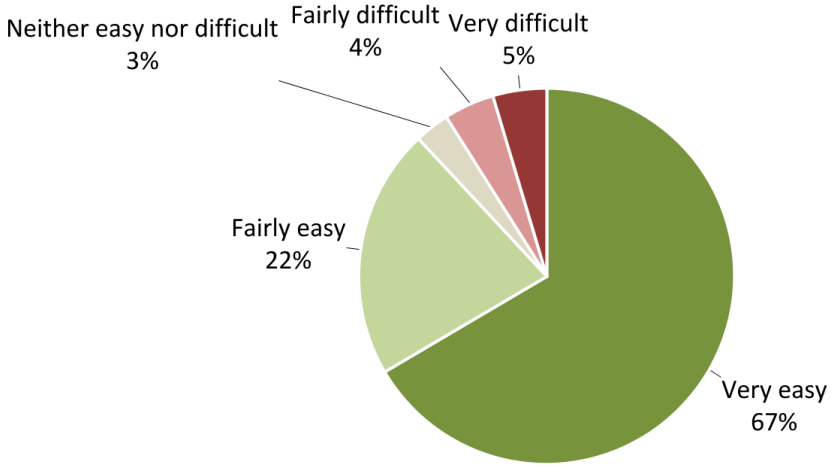


Base: All Switchers (1363)

4.52 Two thirds of respondents arranged their switch using a retailer website or by direct contact with retailer (67%); almost all others used a broker or consultant (27%).

4.53 Micro organisations and those spending under £1,000 annually on their water bills were significantly more likely to arrange the switch using a retailer's website or through direct contact with a retailer, while large organisations and SMEs were significantly more likely to use a broker or consultant. Customers who switched to Everflow were significantly more likely to have used a price comparison website or broker/consultant.

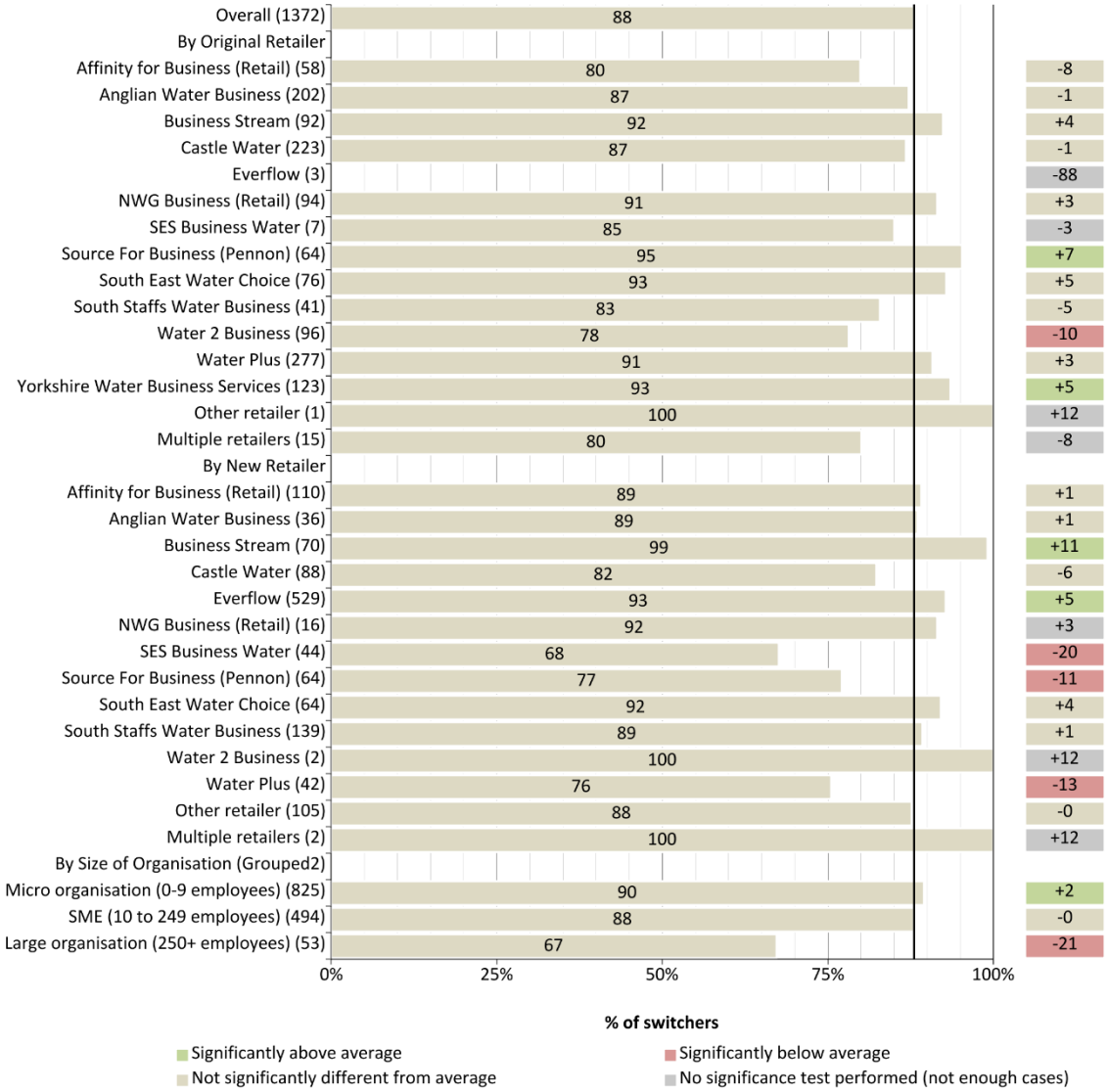
Figure 55: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?



Base: All Switchers (1372)

4.54 Nearly 9 in 10 switchers (88%) said they found the switching process easy. Only around 1 in 10 found the process difficult (9%). Those who found the switching process easy were significantly more likely to say they were satisfied with their retailer.

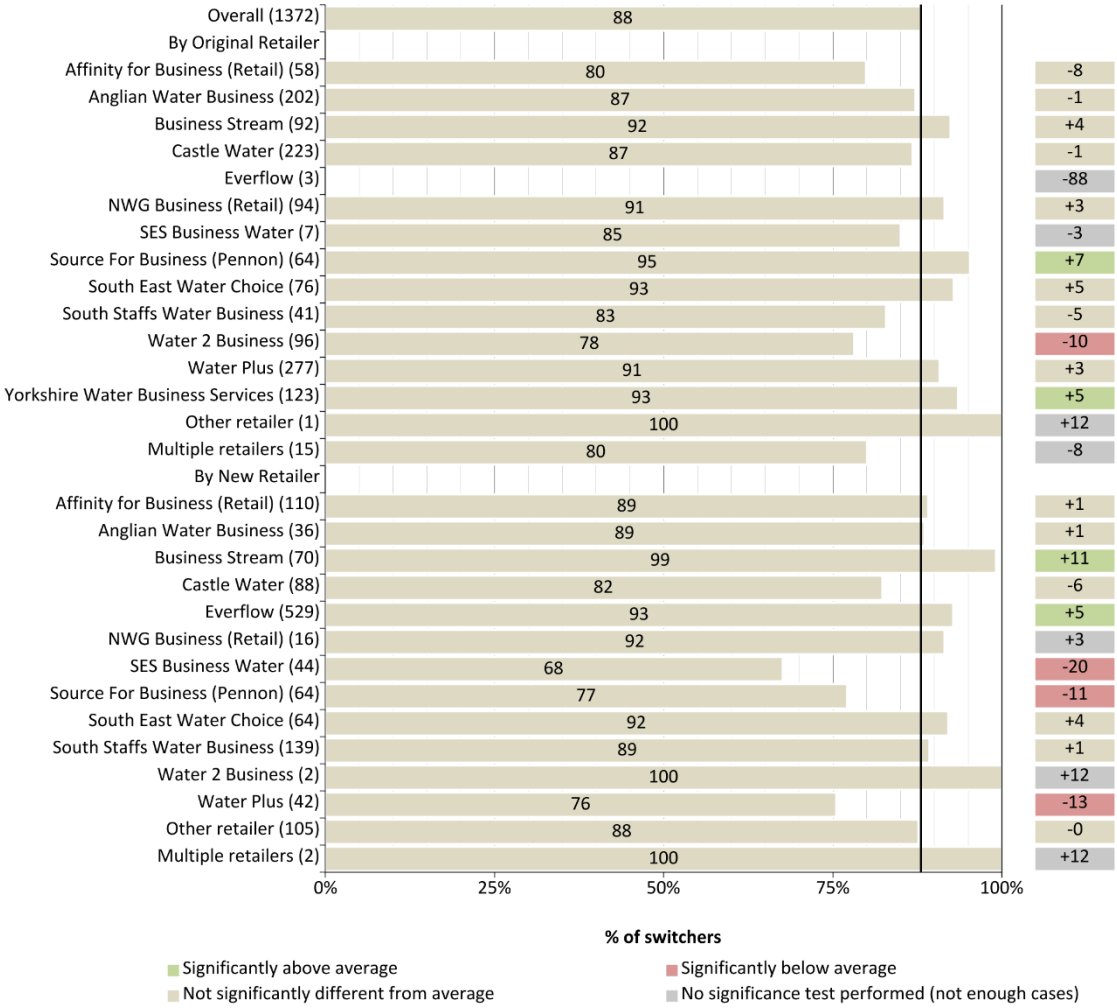
Figure 56: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer? By organisation characteristics



Base: All Switchers (number of respondents shown in brackets)

4.55 Micro organisations (with 0-9 employees), those customers spending less than £1000 annually on their water bill, customers with a single premise and sole traders were significantly more likely to say the process was easy compared to average. Comparatively, large customers (250 employees or more), those spending £10,000 or more on their water bill annually, and customers with 10 or more premises were significantly more likely to say the switching process was difficult.

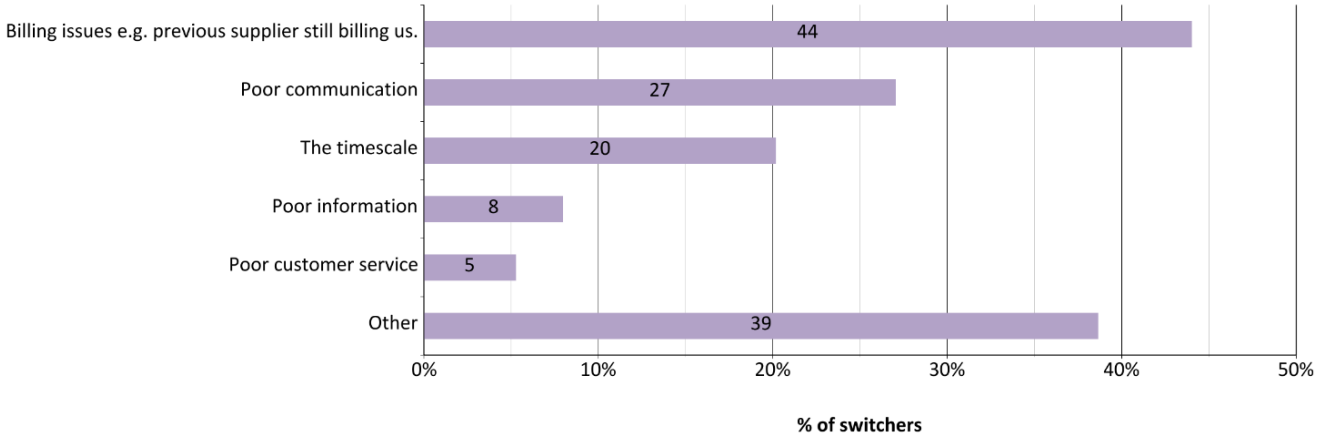
Figure 57: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer? By retailer (new and old)



Base: All Switchers (number of respondents shown in brackets)

4.56 Customers that switched from Source for Business and Yorkshire Water, as well as those who switched to Business Stream and Everflow, were significantly more likely to say they found the switching process easy. By contrast, those who switched from Water 2 Business and to SES Business Water, Source for business and Water plus were significantly less likely to say they found the process easy.

Figure 58: What did you find difficult about the switching process?

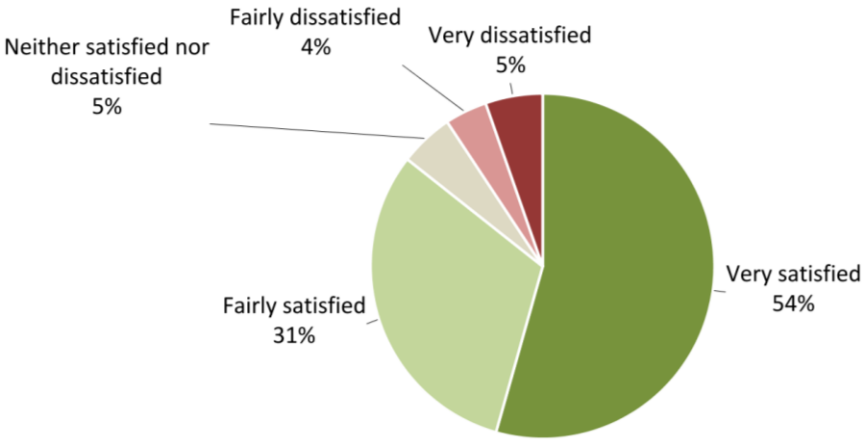


Base: Switchers who found the switching process difficult (117)

4.57 The most common difficulty with the switching progress was with billing (44%). These included problems such as customers still receiving bills from their old retailer, incorrect final meter readings being provided, and issues getting refunds for remaining credit with their old retailer. 27% quoted poor communication, including problems getting in contact with retailers, and miscommunication between the old and new retailers themselves. A fifth (20%) mentioned timescales being an issue, including slowness transferring the account.

4.58 39% of switchers gave other reasons for finding the switching process difficult. These comments tended to have unique circumstances or highly specific difficulties which could not be coded. The problems these organisations experienced included the following: discovering the residential and commercial parts of the property had been registered incorrectly originally; experiencing an address 'mix up' with the new retailer; mistakes on the first invoice issued by the new retailer; being unable to get final meter readings from the previous retailer; only part of the retail services being transferred; having to pay for a year's services in advance; having to 'switch twice' because the first time was unsuccessful; the new retailer only providing meter estimates and not actual readings; length of contract being different to original agreement at the point of signing; being billed separately for water and sewerage despite consolidating; and generally more paperwork/additional effort than was originally expected.

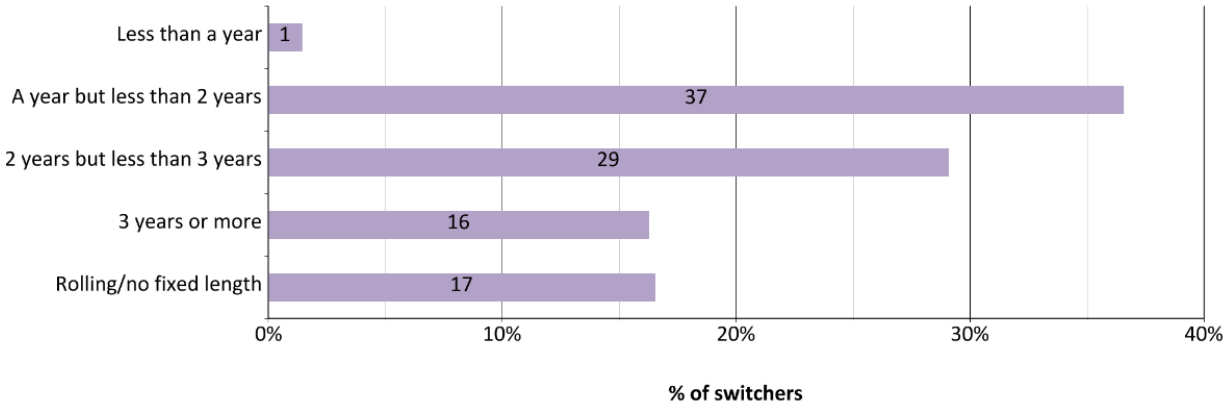
Figure 59: How satisfied or dissatisfied were you with the time it took for the switch to take place?



Base: All Switchers (1356)

4.59 More than four fifths (86%) of switchers were satisfied with the time it took for the switch to take place. Around 1 in 10 (9%) were dissatisfied. Those who were satisfied with the time it took for the switch to take place were significantly more likely to be satisfied with their retailer overall.

Figure 60: What is the total length of your contract with your new retailer?



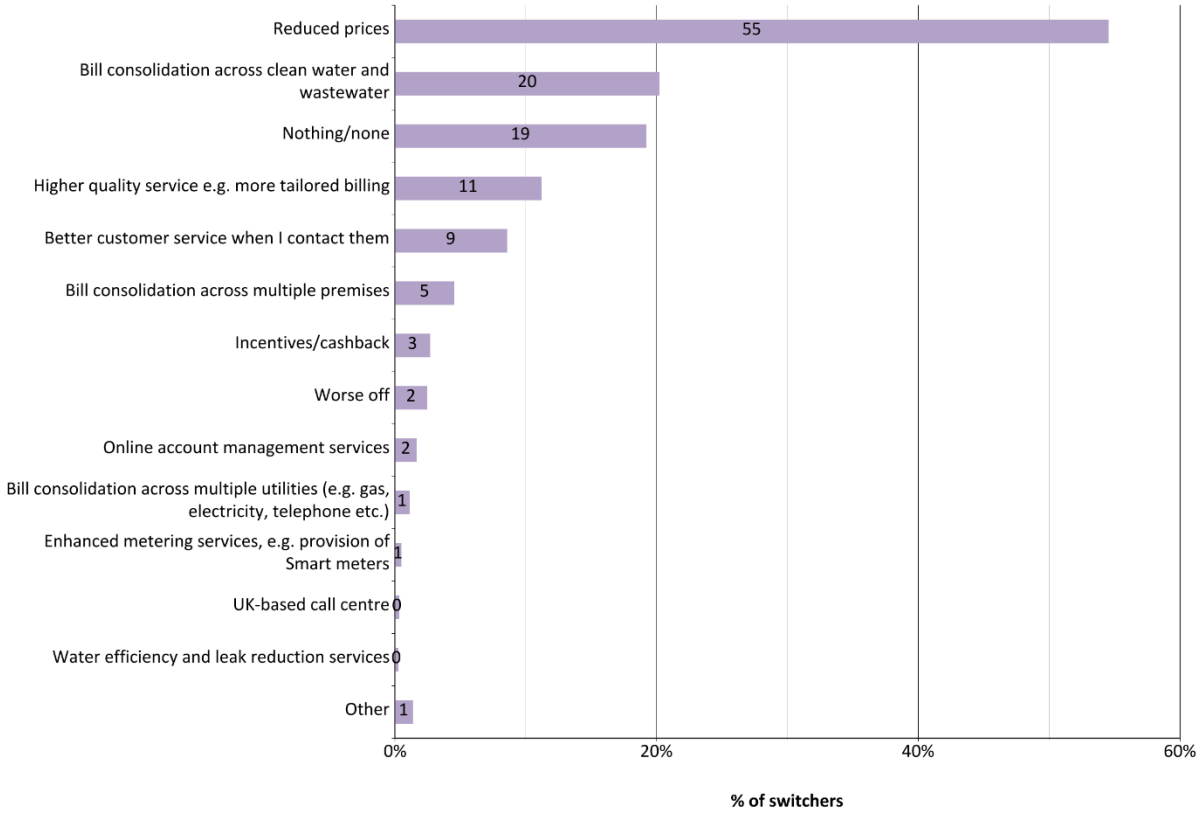
Base: All Switchers (936)

4.60 The majority (83%) of switchers were on fixed contracts, with most of these between a year and two years long (37%). Only 1% of respondents had a contract of less than a year with their new retailer. Contracts between 2 and 3 years were also common, with around 3 in 10 (29%) switchers indicating this contract length. 16% had a contract lasting 3 or more years, while 17% had a rolling contract with no fixed length.

4.61 It is worth noting that around a third (33%) of all respondents did not know the length of their contract with their new retailer (excluded from chart).

Benefits from switching

Figure 61: What benefits, if any, have you achieved from switching?



Base: All Switchers (1366)

4.62 More than half of all switchers experienced a reduction in prices (55%) as a result of switching retailer, while a fifth (20%) experienced consolidation across water and wastewater billing.

4.63 Around 1 in 10 (11%) had achieved a higher quality of service, such as more tailored billing to their organisation's needs, and a similar proportion (9%) experienced an improvement in customer service.

4.64 However, around a fifth (19%) stated that they had experienced no benefits from switching, and a small number (2%) said that they were worse off after switching.

4.65 Switchers who used brokers or consultants were significantly more likely to say they had experienced reduced prices, while switchers who had made direct contact with an alternative retailer were significantly less likely to say so.

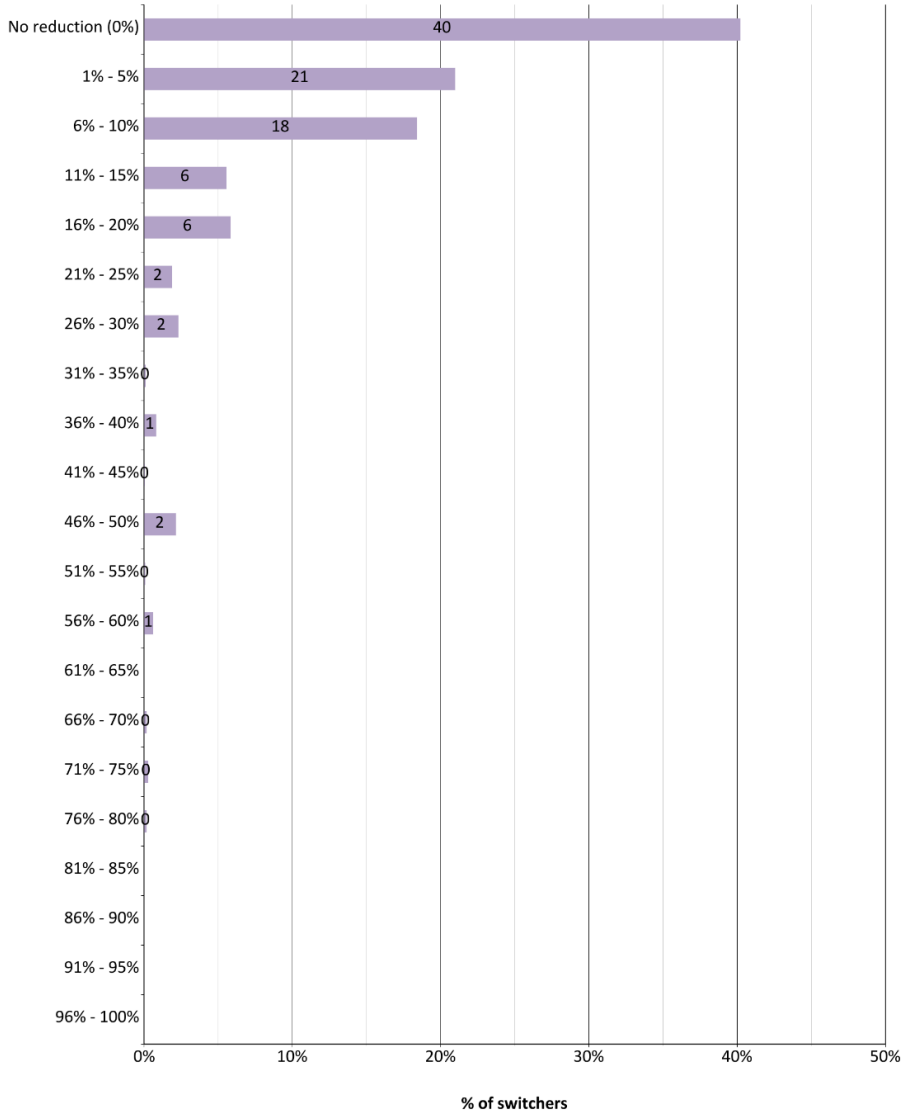
4.66 In terms of differences between retailers, those switching from NWG Business, Source for Business, Water Plus, as well as organisations switching to Everflow, were significantly more likely to say they had reduced prices.

4.67 Those who had switched to Castle Water were significantly more likely to say they were worse off than they had been with their previous retailer.

4.68 Customers involved in accommodation and food service activities were also significantly more likely to have achieved price savings, while customers providing education activities were significantly more likely to report higher quality services like tailored billing as well as better customer service.

4.69 Bill consolidation across waste water and clean water was reported significantly more frequently by those in construction industries, IT services and professional, scientific and technical activities.

Figure 62: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer?



Base: All Switchers (829)

4.70 All respondents were asked how much they had roughly saved or expected to save as a result of having switched retailer. 60% said they had achieved some level of saving, slightly higher than the proportion who mentioned they had made savings when asked what benefits they had achieved from switching.

4.71 Around a fifth (21%) had made savings in the range of 1-5%, while just less than a fifth (18%) said they had saved between 6% and 10%.

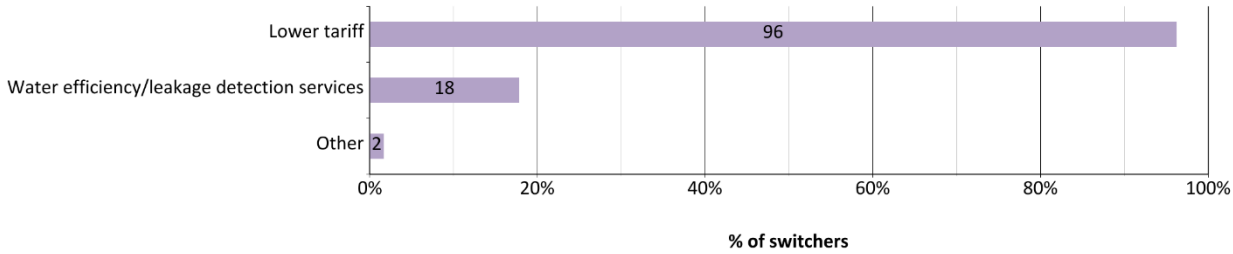
4.72 On average, customers suggested they made savings, or expected to make savings of 8% overall, including 9% among micro organisations, 8% among SMEs and 4% among large organisations.

4.73 Micro sized businesses (0-9 employees) were significantly more likely to say they had achieved no savings at all, as were those whose original retailers were South West Water Choice or Business Stream.

4.74 However, switchers whose original retailers were NWG Business or Source for Business were significantly less likely to say they had made no savings.

4.75 It should be noted that the answers given were respondents' estimates of savings or expected savings, and may not reflect the savings actually achieved. Around a third of all respondents (34%) didn't know how much they had saved or expected to save (this group is excluded from this chart).

Figure 63: Is this reduction due to a lower tariff, water efficiency/leakage detection services or both?



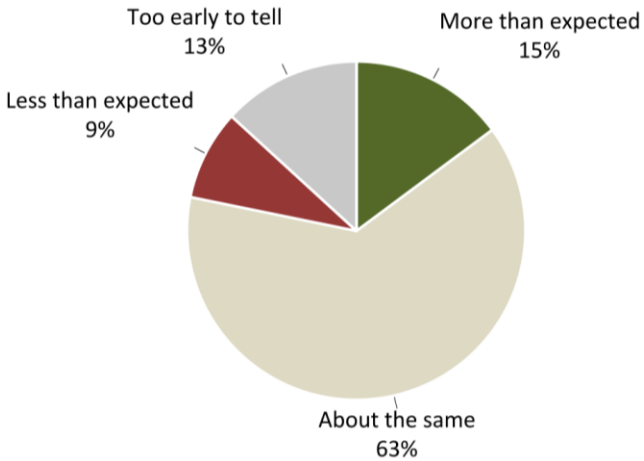
Base: Switchers who made/expected savings on their water bills (543)

4.76 The vast majority of respondents said their savings were due to a lower tariff (96%). Less than a fifth (18%) said that their savings were due wholly or in part to water efficiency/leakage detection services.

4.77 A small number (2%) of switchers who had saved money said that there were other reasons besides a lower tariff and water efficiency/leakage detection services which had caused a reduction in their bills.

4.78 These reasons included introductory offers of credit to their accounts/money off their first bill, service charges/standing charges removed, and correct meter readings.

Figure 64: Have you saved more, less, or about the same as you expected to save prior to the switch?



Base: All Switchers (1237)

4.79 Just less than two thirds (63%) of switchers saved about the same as they expected to save prior to the switch. 15% said that they had saved more than expected, while 9% had saved less than expected.

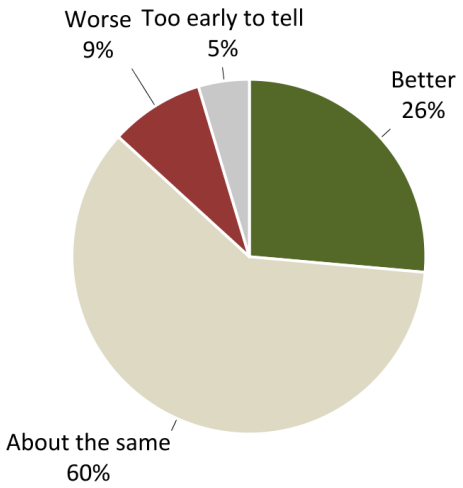
4.80 Large customers (250+ employees) were significantly less likely to say they saved more than expected, while micro organisations (0-9 employees) were significantly more likely to say they saved less than they expected.

4.81 Customers who switched to Everflow were significantly more likely to say they saved more than they expected to save prior to switching, while customers switching to Castle Water, Water Plus and Anglian Water Business were significantly less likely to say they saved a greater amount than expected.

4.82 Switchers were also significantly more likely to say they saved more than expected if they used a consultant to switch.

4.83 Switchers who felt that they had saved more than, or about the same as they expected to save prior to the switch were significantly more likely to be satisfied with their retailer, while those who had saved less or felt it was too early to tell if they had made savings were significantly less likely to be satisfied.

Figure 65: Is the quality of retail services like billing and meter-reading from your new retailer better, worse, or about the same as your previous retailer?



Base: All Switchers (1353)

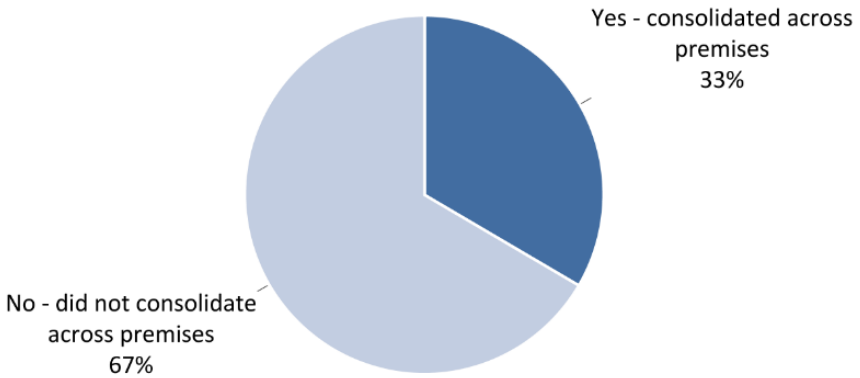
4.84 While 6 in 10 (60%) switchers said the quality of retail services had remained the same since the switch, a quarter (26%) said they had got better and 9% said they had got worse.

4.85 Those whose original retailer was Castle Water, and those who switched to Affinity for Business or South East Water Choice were significantly more likely to say that the quality of retail services was better. Those whose original retailer was Yorkshire Water, and customers switching to Castle Water were significantly more likely to say the quality of services like billing and meter reading was worse than their previous retailer.

4.86 Customers with 10+ premises were also significantly more likely to say their retailer services were better than their previous retailer.

4.87 Those who felt their retail services were better or about the same as their previous retailer were significantly more satisfied, while those who felt this was worse than their previous retailer were significantly more dissatisfied with their retailer overall.

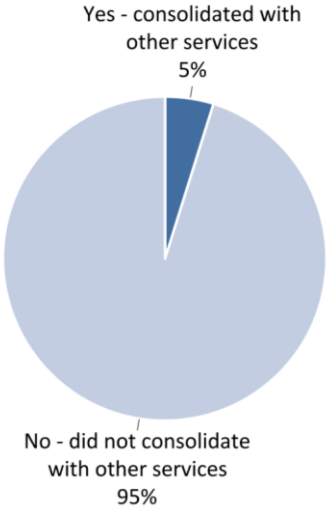
Figure 66: Have you consolidated your water bill across multiple premises into a single bill?



Base: Switchers with multiple premises (225)

4.88 Switchers who indicated they had multiple non-household premises were asked whether they consolidated their sites to a single bill. A third (33%) had consolidated sites but two thirds (67%) had not.

Figure 67: Have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas so that they are provided by the same retailer?



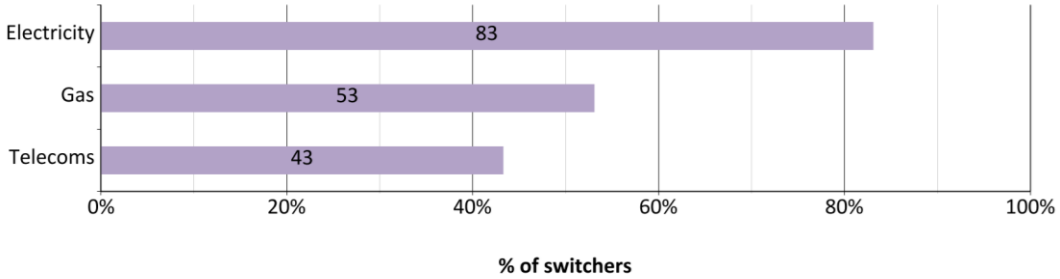
Base: All Switchers (1394)

4.89 1 in 20 switchers (5%) had consolidated their water retail services with other utilities, while the majority of switchers (95%) had not done so. Those who had were significantly more likely to be satisfied with their current retailer.

4.90 Switchers spending £100,000+ annually on their water bills, customers with 10+ premises and those who used brokers were significantly more likely to consolidate utilities.

4.91 Those in the accommodation and food services sector were also significantly more likely to consolidate utilities to the same retailer, and those who were ultimately more satisfied overall with their retail service provider were also significantly more likely to have consolidated utilities.

Figure 68: Which of the following utilities have you consolidated with your water retail services?



Base: Switchers who had consolidated utilities (76)

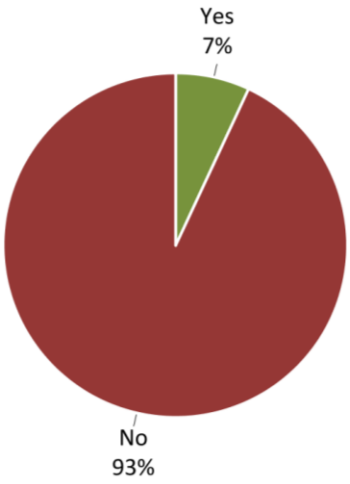
4.92 Of the switchers who had consolidated utilities, more than four fifths (83%) had done so with their electricity provider. Around half (53%) had consolidated with their gas, and more than two fifths (43%) had consolidated with their telecoms.

4.93 Customers were asked how much, if anything, they had saved on administration costs by consolidating their bills. 60% of businesses said they'd not saved anything, but 10% said they'd made a cash saving. Two large organisations, both with 10+ premises and spending more than £100,000 annually on their water bills said they would save £20,000 and £25,000 on administration costs. One of these businesses stated that this was because they could reduce the number of consultants they use now the switch is completed. Others made savings ranging from £1.30 to £4,000.

4.94 31% of customers made 'another type of saving'. Generally, this saving was in time and/or effort dealing with checking and paying bills, or from admin costs reducing due to the reduction in the cost of the water bill. One organisation stated this was due to a change in payment method (from cheque to direct debit).

Problems and complaints

Figure 69: Have you had any problems with clean or waste water services since 1st April 2017?



Base: All Switchers (1396)

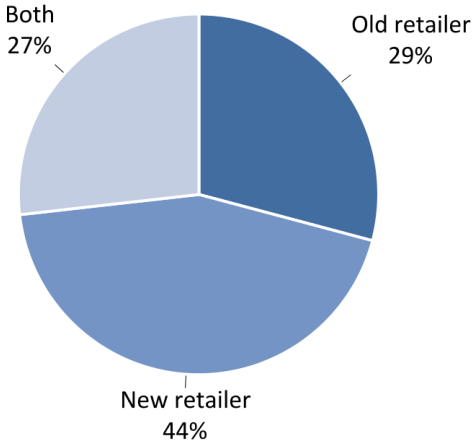
4.95 Less than 1 in 10 switchers (7%) have had problems with their clean or waste water services since 1st April 2017.

4.96 Large organisations (250 employees+), those spending £10,000-£100,000 annually on their water bills, and those who had switched to Castle Water were significantly more likely to have experienced problems, as were customers working in property services.

4.97 Customers spending £1,000 a year or less on their water bills, customers that used brokers to switch, and those who switched to Everflow or Source for Business were significantly less likely to report problems.

4.98 Unsurprisingly, switchers who were dissatisfied with their retailer overall were significantly more likely to have experienced problems, and vice versa.

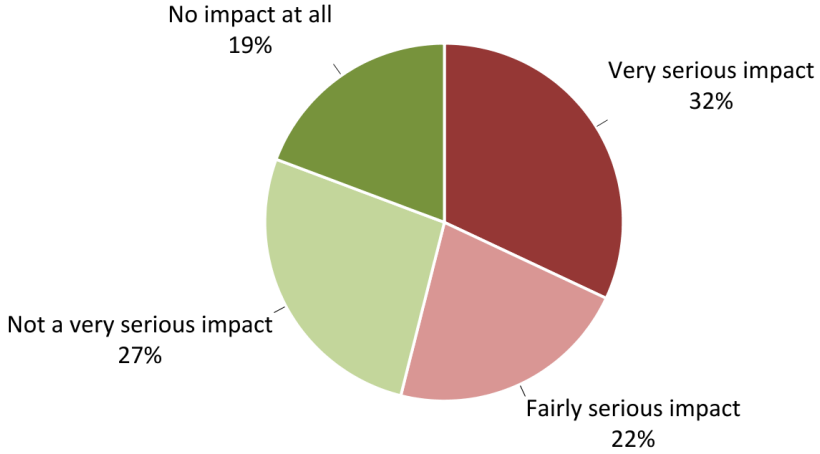
Figure 70: Did you experience these problems with your old or new retailer?



Base: All Switchers who had experienced problems (94)

4.99 Of those who had experienced problems, more had done so with their new retailer (44%) than with their old retailer (29%). Just over a quarter (27%) of switchers had problems with both their new and old retailers.

Figure 71: What impact, if any, did these problems have on your business?



Base: Switchers who had experienced problems (92)

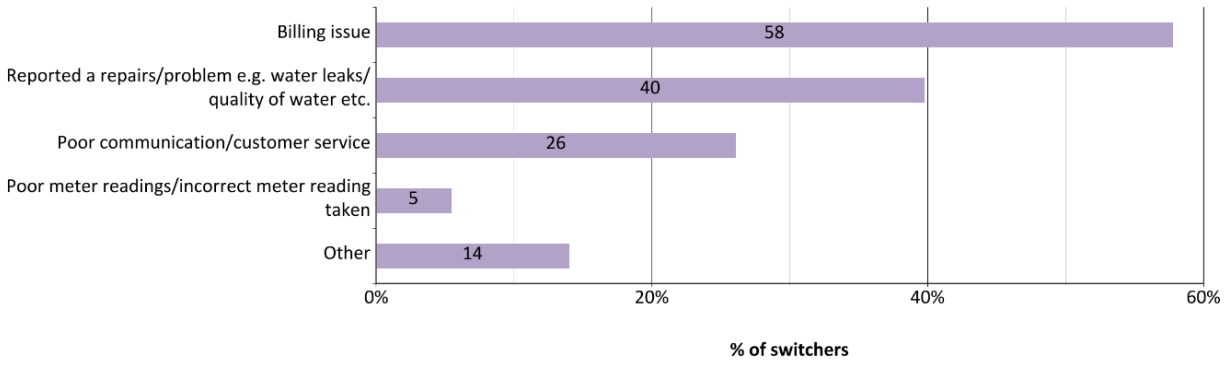
4.100 54% of switchers who had experienced problems with their clean or waste water services said that the problems had an impact on their business, including about a third (32%) having a very serious and 22% having a fairly serious impact.

4.101 Just over a quarter (27%) said the impact wasn't very serious and 1 in 5 (19%) said that the problems have had no impact at all to their business.

4.102 Those who said the impact to their business was very or fairly serious were significantly less likely to be satisfied with their current retailer overall, but this was also the case even where respondents said the problem did not have a serious impact on their business.

4.103 The nature of the problems experienced by switchers are outlined below, split out by those who had experienced the problems with their old retailer vs those who had experienced problems with their new retailer. While the bases in both these charts are small, the types of problems generally experienced between the two were similar.

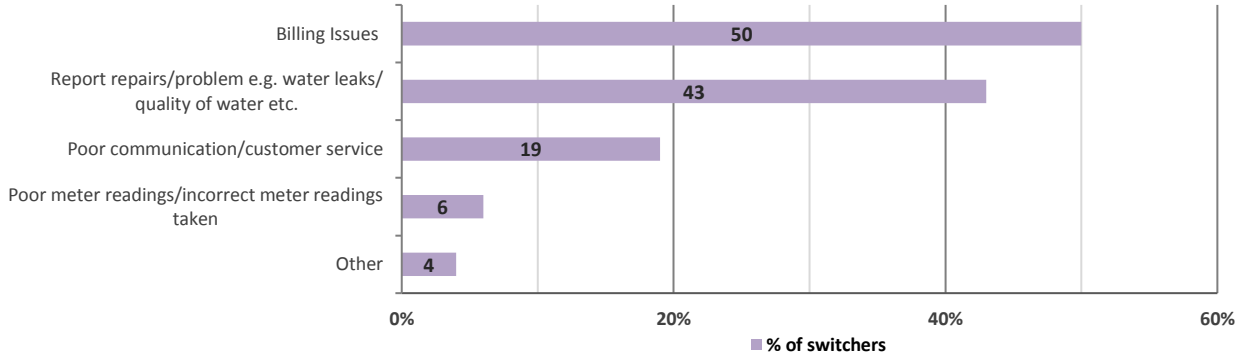
Figure 72: What were the [Issues with the OLD RETAILER]?



Base: Switchers who experienced problems with their old retailer (24)

4.104 Nearly 6 in 10 (58%) switchers who had problems with their old retailer said they had a billing issue, while 4 in 10 (40%) reported a problem with repairs or quality of water and a quarter (26%) said they experienced poor communication/customer service.

Figure 73: What were the [Issues with the NEW RETAILER]?



Base: Switchers who experienced problems with their new retailer (44)

4.105 Half (50%) of those who had problems with their new retailer said they had a billing issue, while over 4 in 10 (43%) reported a problem with repairs or quality of water and around a fifth (19%) received poor communication or customer service.

Interaction with the Scottish market

4.106 Only 19 switchers interviewed also had premises in Scotland. These customers were asked a series of questions about their interaction with the Scottish water market. Due to the low number of responses, charts with percentages have not been included in this section and results are presented instead in the following text. These results are indicative only.

4.107 Most (13 of 18) customers with sites in England and Scotland said they had consolidated their English and Scottish sites to the same retailer. A majority of these (7) had consolidated their English and Scottish sites to a brand new retailer; 3 switched their English sites to their Scottish retailer and 3 did the reverse.

4.108 Almost all (11 of 13) customers who have consolidated their English & Scottish sites to the same retailer receive a consolidated bill.

4.109 Almost half (7 of 15) of customers said the retail market between Scotland and England is very/fairly disjointed. 5 customers said the markets were very/fairly seamless and the rest (3) said they were neither disjointed nor seamless.

4.110 Those that said the retail market between Scotland and England was disjointed were asked why; key arguments are highlighted below:

The Scottish market is 'more mature'

> *They de-regulated at different times so the Scottish market is much more mature in terms of market accuracy and market data.*
>
> *Scotland deregulated two or three years before.*

Costs vary across England/Scotland

> *There is no real saving to be made from switching our English sites in comparison to our Scottish sites.*
>
> *In Scotland they are charging a lot more.*

There are many English wholesalers

> *In Scotland they have only one wholesaler in the region, it is easier to treat them as a whole, but in England there are 16 or however many, with all different price plans going backwards and forwards*.

Too many parties involved generally

> *Lack of clarity around contracts with Scotland sites, meaning it is difficult to find out when they end and when they can come over to the new contract. In a way there are too many third parties involved, there's us using a broker and another in Scotland and them using another third party also. There's about 5 people trying to deal with the same situation.*

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Annex – Questionnaire scripts

Wave 1 – Survey of all Non-Household Customers

Section A: INTRO AND CALL MANAGEMENT SCREENING QUESTIONS

A1a Does your organisation operate mainly from your or someone else's home?

If yes…A1b Just to clarify, so your organisation DOESN'T have ANY OTHER main premises?

A2 Can I check whether your organisation is responsible for organising and paying for water utilities?

A3a How many premises does your organisation operate from?

If more than one…A3b And for how many of these premises do you have responsibility for water utility contracts?

If one…A3c Does your organisation receive its clean water *and* waste water/sewerage services from the same company?

If single site and same supplier…A4a Which retailer currently provides both clean water and waste water/sewerage services to your organisation?

If different suppliers…A4b Which retailer(s) currently provide(s) *clean water* to your organisation?

If different suppliers…A4c Which retailer(s) currently provide(s) *waste water/sewerage services* to your organisation?

A6 What is your organisation's FULL postcode?

If postcode in Scotland and has multiple premises…A6b Does your organisation have any premises in England?

Section B: SURVEY QUESTIONS

B1 I'd like to start by asking about your awareness of recent changes to the water market. Since April 2017, businesses, charities and public sector organisations have been able to change who supplies their clean water and waste water or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?

Satisfaction

I'm now going to ask about your current water and waste water services retailer(s) who provide customer services, meter reading and billing. They are not responsible for the quality of the water you receive.

B2c *Overall*, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?

If dissatisfied…B2d Why were you dissatisfied?

Water quality issue
Price
Customer service
Billing issues
Other (please specify)

If aware of changes…B3b Which of the following scenarios best applies to your organisation?

You have switched retailer for clean water or waste water since 1st April 2017
You are currently actively considering switching retailer. By actively considering, we mean you have taken steps to search for and compare different providers
You actively considered switching but decided not to
You actually tried to arrange a switch but something prevented the switch from happening
You have not actively considered switching but plan to over the next 3 months
You have not actively considered switching but plan to at some point further in the future
You are not interested in switching water and wastewater retailer

If switched…B3C Just to double check that your organisation chose to switch retailer rather than being switched by your retailer?

Searching and Comparing

If aware of changes…B4a Are you aware that intermediaries such as brokers and price comparison websites can help you compare the different opportunities in the water retail market?

If actively considered switching…B4b Which of the following have you used to search for information about alternative retailers?

The Open Water website
A retailer's website
A price comparison website
Direct contact with another retailer
A broker
A consultant
Other (please specify)
None of the above

If actively considered switching…B5 How easy or difficult was it for you to find the information you needed?

If difficult…B5b Why was this difficult?

Didn't know where to look for information/where to go
Don't know enough about the new market
Not enough time
Information not available via phone/online/my preferred communication method
Information found wasn't relevant
Information found wasn't clear/didn't understand information
Other

If actively considered switching…B6 How easy or difficult was it to compare different retailers?

If difficult…B6b Why was this difficult?

Prices weren't clear
Information wasn't consistent/was hard to compare
Didn't know what to compare (lack of familiarity with the market)
Not enough time
Retailer failed to respond to query
Retailers not interested in me as a customer
Information not available via phone/online/my preferred communication method
Other

If actively considered switching…B7 How important or unimportant were each of the following factors in your decisions when comparing providers?

a. Price
b. Quality of customer service
c. Consolidating water and sewerage services to the same retailer
d. Consolidating multiple premises to the same retailer
e. Consolidating different utilities (including water) to the same supplier
f. Water efficiency, leakage control and enhanced metering services
g. Online account management services
h. Reputation of the retailer
i. Quality of billing services

If actively considered switching…B7J Are there any other factors which were important in your decisions when comparing providers?

If not actively considered switching or not aware of changes…B9 How important or unimportant are each of the following factors when thinking about your water retail services?

a. Price
b. Quality of customer service
c. Water efficiency, leakage control and enhanced metering services
d. Online account management services
e. Quality of billing services

If not actively considered switching or not aware of changes…B9f Are there any other factors which are important when thinking about your water retail services?

Intermediaries

Now thinking about searching for information …

If used a broker or consultant…B11b Did the broker or consultant you used to search for information about alternative retailers contact you or did you approach them?

If used a broker, consultant or price comparison website…B12a How satisfied or dissatisfied were you with your discussions with the broker or use of the price comparison website?

If dissatisfied…B12c You said you were dissatisfied, please can you tell me why?

Switching

If switched or tried to arrange a switch…B13

Now thinking about your decision to switch retailer, how did you *arrange* the switch?

Using a retailer website or direct contact with retailer
Using a price comparison website
Using a broker or consultant
Other (please specify)

If switched or tried to arrange a switch…B14 Why did you decide to switch retailer?

If switched or tried to arrange a switch…B14b Have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas so that they are provided by the same retailer?

If switched or tried to arrange a switch…B15 Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?

If difficult…B15b What did you find difficult about the switching process?

If not actively considered switching…B16a Why have you not considered switching clean water or waste water retailer?

Service is good/happy with current retailer
Don't know any other retailers/no alternative
Don't know how to switch
Too much effort to switch/no point
Prefer a local company
Better the devil you know
Bad experiences switching other utilities (e.g. gas, electric, telephone)
No retailer is offering what I want/what I am looking for
Worried about being worse off after switching/being taken advantage of
Intend to in the future, but haven't got round to it
Other (please specify)

If actively considered switching but decided not to…B16c

Why did you decide not to switch retailers after considering it?

Savings were minimal/didn't save enough money
No other benefits to be gained from switching
Service is good/happy with current retailer
Don't know any other retailers/no alternative
Too much effort to switch
Prefer a local company
Better the devil you know
Bad experiences switching other utilities (e.g. gas, electric, telephone)
No retailer is offering what I want/what I am looking for
Worried about being worse off after switching/being taken advantage of
Other (please specify)

If started to arrange a switch but something prevented it from happening…B16d What prevented the switch from happening?

If switched…B17a In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer?

If reduction in water bills….B17b
Is this reduction due to a lower tariff, water efficiency services or both?

If reduction due to a lower tariff and water efficiency….B17ba
Roughly what proportion of the reduction is due to a lower tariff and what proportion is due to water efficiency services?

If reduction due to a lower tariff and other….B17bb
Roughly what proportion of the reduction is due to a lower tariff and what proportion is due to [other]?

If reduction due to water efficiency and other….B17bc
Roughly what proportion of the reduction is due to water efficiency services and what proportion is due to [other]?

If reduction due to a lower tariff, water efficiency and other….B17bd
Roughly what proportion of the reduction is due to a lower tariff, what proportion is due to water efficiency services and what proportion is due to [other]?

If switched…B17c What is the total length of your contract with your new retailer?

If not switched…B17d In percentage terms, what level of annual water bill reduction would encourage you to switch retailer?

Renegotiating

If switched…Thinking about your current and previous retailers, and not including any negotiations with the new retailer which occurred during the switch…

If switched…B18a Have you attempted to negotiate with your retailer for a better deal on your clean water or waste water since April 2017?

If attempted to renegotiate…B18b What were your reasons for attempting to renegotiate?

Wanted lower price
Wanted better quality customer service
Bill consolidation across multiple premises
Water efficiency services
Leakage control services
Enhanced metering services
Other (please specify)

If attempted to renegotiate…B19 Did you agree a renegotiated contract with the retailer?

If agreed a renegotiated contract…B20a What benefits have you achieved from renegotiating?

Made financial savings
Bill consolidation across multiple premises
Water efficiency services
Enhanced metering services
Online account management services
UK-based call centre
Other (specify)
Nothing

If made financial savings…B20b In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating?

If made financial savings…B20c Were the savings you made due to a lower tariff, water efficiency services or both?

If reduction due to a lower tariff and water efficiency…B20CA
Roughly what proportion of the savings is due to a lower tariff and what proportion is due to water efficiency services?

If reduction due to a lower tariff and other…B20CB
Roughly what proportion of the savings is due to a lower tariff and what proportion is due to [other]?

If reduction due to water efficiency and other…B20CC
Roughly what proportion of the savings is due to water efficiency services and what proportion is due to [other]?

If reduction due to a lower tariff, water efficiency and other…B20CD
Roughly what proportion of the savings is due to a lower tariff, what proportion is due to water efficiency services and what proportion is due to [other]?

Problems and Complaints

B21a Have you had any problems with clean or waste water services since 1st April 2017?

If had a problem…B21c What were they?

If had a problem…B21d How serious an impact did these problems have on your business?

If had a problem…B22a Since April 2017, have you made a complaint about your clean water or waste water retail services?

If made a complaint…B23b What did the complaint(s) relate to?

Section C: ORGANISATION DEMOGRAPHICS

I would now just like to ask some questions about your organisation and your water usage…

C1AA Including yourself, how many people work for your organisation, across all of your premises?

C1c Is your organisation legally classed as a 'Sole Trader'?

C1d Do you have a trade effluent licence?

C1eb/C1e Are you on a metered supply?

C2A Approximately how much water does your organisation use, to the nearest litre, per year across all premises?

C3A Approximately how much does your organisation pay for your water supply and sewerage retail services per year, across all premises?

Wave 2 – Survey of all Market Switchers

Section A: INTRO AND CALL MANAGEMENT

A3a How many premises does your organisation operate from?

If more than one…A3b And for how many of these premises do you have responsibility for water utility contracts?

If more than one…A7 Does your organisation have any premises in Scotland?

Section B: SURVEY QUESTIONS

N1 Can I just confirm that your organisation has switched clean or waste water retailer since 1st April 2017?

Satisfaction

I'd now like to ask about your current water and waste water services retailer(s)– that is the company or companies that provide your clean water and waste water retail services, which include customer services, meter reading and billing. They are not responsible for the quality of the water you receive.

B2c *Overall*, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?

If dissatisfied…B2d Why are you dissatisfied?

Water quality issue (e.g. cloudy water/strange taste)
Price (e.g. too expensive)
Customer service (e.g. slow to respond to issues, hard to get in contact with etc.)
Billing issues (e.g. not receiving bills, incorrect charges)
Other (please specify)

Searching and Comparing

B4a Are you aware that intermediaries such as brokers and price comparison websites can help you compare the different opportunities in the water retail market?

B4b Which of the following have you used to search for information about alternative retailers?

The Open Water website
A retailer's website
A price comparison website
Direct contact with another retailer
A broker
A consultant
Other (please specify)

B5 How easy or difficult was it for you to find the information you needed?
If difficult….B5b Why was this difficult?
Didn't know where to look for information/where to go
Don't know enough about the new market
Didn't have enough time to look for information
Information not available via phone/online/my preferred communication method
Couldn't get the information immediately or quickly enough
Retailer failed to respond to query or tender
Information found wasn't relevant
Information found wasn't clear/didn't understand information
Other

A5c How many, if any, different retailers did you receive price quotations from prior to switching?

B6 How easy or difficult was it to compare different retailers?

If difficult…B6b Why was this difficult?
Prices weren't clear
Information wasn't consistent/was hard to compare
Didn't know what to compare (lack of familiarity with the market)
Didn't have enough time
Retailer failed to respond to query or tender
Retailers not interested in me as a customer
Information not available via phone/online/my preferred communication method
Other

B6c What, if anything, would have made searching and comparing offers or prices from retailers easier?

B7 How important or unimportant were each of the following factors in your decisions when comparing providers?

a. Price
b. Quality of customer service
c. Consolidating water and sewerage services to the same retailer
d. Consolidating multiple premises to the same retailer [for multi-site customers only]
e. Consolidating different utilities (including water) to the same supplier
f. Water efficiency, leakage control and enhanced metering services
g. Online account management services
h. Reputation of the retailer
i. Quality of billing services

B7J Are there any other factors which were important in your decisions when comparing providers?

A8 Which of the following best describes your experience of agreeing a price with your new retailer?

A5e Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal?

If yes…A5f What, if anything, did your previous retailer offer you to encourage you to stay?
Nothing
Cheaper tariff
Additional service
Other (please specify)

Intermediaries

If used a comparison website, a broker or consultant…Now thinking about searching for information …

If used a broker or consultant…B11b Did the broker or consultant you used to search for information about alternative retailers contact you or did you approach them?

They contacted me ☐ 1
I approached them ☐ 2

If used a comparison website, a broker or consultant…B12a How satisfied or dissatisfied were you with your discussions with the broker and/or use of a price comparison website?

If dissatisfied…B12c You said you were dissatisfied, please can you tell me why?

Switching

B14 Now thinking about your decision to switch retailer, why did you decide to switch?

B13 How did you arrange the switch?

Using a retailer website or direct contact with retailer
Using a price comparison website
Using a broker or consultant
Other (please specify)

B15 Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?

If difficult…B15b What did you find difficult about the switching process?

B15c How satisfied or dissatisfied were you with the time it took for the switch to take place?

B17c What is the total length of your contract with your new retailer?

Benefits from switching

B16e What benefits, if any, have you achieved from switching?

Reduced prices
Higher quality service e.g. more tailored billing
Better customer service when I contact them
Bill consolidation across clean water and wastewater
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, electricity, telephone etc.)
Water efficiency and leak reduction services
Enhanced metering services, e.g. provision of Smart meters
Online account management services
UK-based call centre
Other (specify)
Nothing / none
Worse off

B17a In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer, if at all?

If a reduction…B17b
As well as offering lower tariffs, retailers can also offer services such as water efficiency and leakage detection to help save water and reduce bills.
Is your bill reduction due to a lower tariff or water efficiency and leakage detection services or both?

If reduction due to a lower tariff and water efficiency…B17ba
Roughly what proportion of the reduction is due to a lower tariff and what proportion is due to water efficiency and leakage detection services?

If reduction due to a lower tariff and other…B17bb
Roughly what proportion of the reduction is due to a lower tariff and what proportion is due to [Other]?

If reduction due to a water efficiency and other…B17bc
Roughly what proportion of the reduction is due to water efficiency and leakage detection services and what proportion is due to [Other]?

If reduction due to a lower tariff and water efficiency and other…B17bd
Roughly what proportion of the reduction is due to a lower tariff, what proportion is due to water efficiency and leakage detection services and what proportion is due to [Other]?

B17e Have you saved more, less, or about the same as you expected to save prior to the switch?

B17f Is the quality of retail services like billing and meter-reading from your new retailer better, worse, or about the same as your previous retailer?

If switched and not already said they have consolidated bills across multiple utilities…B14b Have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas so that they are provided by the same retailer?

If previously mentioned they had consolidated bills across multiple utilities…You mentioned that you have benefited from bill consolidation across multiple utilities…

Electricity
Gas
Telecoms
Other (please specify)

If more than one premises and not already said they have consolidated bills across multiple premises…B14d Have you consolidated your water bill across multiple premises into a single bill?

If previously mentioned they had consolidated bills across multiple premises…You mentioned that you have benefited from bill consolidation across multiple premises…

If consolidated bills across multiple premises…B17da How many premises that were previously billed separately have now been consolidated into a single bill?

If consolidated bills across multiple utilities or multiple premises…B17db Roughly how much, if anything, has your organisation saved on administration costs as a result of bill consolidation?

B17ea Do you think your switch to another retailer will help you to reduce the amount or type of waste water you put into the sewerage system?

Problems and Complaints

B21a Have you had any problems with clean or waste water services since 1st April 2017?

If had a problem…B21c What were they?

If had a problem…B21e Did you experience these problems with your old or new retailer?

If had a problem…B21d What impact, if any, did these problems have on your business?

Interaction with Scottish market

If have premises in Scotland…B22 Have you consolidated your English, [eligible Welsh] and Scottish sites to the same retailer?

If yes…B23 Did you…

Switch your English [and eligible Welsh] sites to your Scottish retailer
Switch your Scottish sites to your English [and eligible Welsh] retailer
Switch all your sites to a brand new retailer

If yes…B26 Do you receive a consolidated bill covering your sites in both Scotland and England? [/sites in England, Scotland and eligible sites in Wales?]

If have premises in Scotland…B24 Based on your experience, how seamless or disjointed would you say the water retail market is between Scotland and England [/Scotland, England and Wales]?

If disjointed…B25 Why is that?

Section C: ORGANISATION DEMOGRAPHICS

I would now just like to ask some questions about your organisation and your water usage…

C1AA Including yourself, how many people work for your organisation, across all of your premises?

C1c Is your organisation legally classed as a 'Sole Trader'?

If multiple premises…C1eb Are you on a metered supply?

If single premises…C1e Are you on a metered supply?

C3B Approximately how much does your organisation pay for your water supply and sewerage retail services per year, across all premises?