Business Customer Insight Surveys 2019

Final Report

July 2019

This project was carried out in compliance with ISO 20252:2012

As with all our studies, findings from this survey are subject to Opinion Research Services' Standard Terms and Conditions of Contract.

Any press release or publication of the findings of this survey requires the advance approval of ORS.

Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

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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 from billing, customer service and meter readings (retail services). Customers in Wales who use 50,000,000 litres (50ML) of water or more a year are also 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 for customers whilst ensuring that assets are protected and effectively maintained. The opening of the market means that (like many other utility markets) eligible organisations will be free to either switch suppliers or negotiate a better deal with their existing retailer. In addition, customers also have the option to become their own retailer and 'self-supply' their own sites with retail services.

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 February 2019, Ofwat appointed Opinion Research Services (ORS) to undertake customer research. The research was commissioned and funded as a collaborative research project between Ofwat and the Consumer Council for Water (CCWater). Both organisations' objective for the research is to gain further insight from business (i.e. non-household) customers about their experiences and views concerning the business retail water market, including the extent to which they have engaged with the market, how far their needs and expectations have been met, and the reasons for these outcomes. The research includes eligible business customers who have switched provider, renegotiated a new deal with their existing provider, or not switched or renegotiated. The research was undertaken in two tranches; a quantitative survey of 2,000 eligible business customers, and a qualitative survey comprising in-depth interviews of 73 eligible business customers. This report concerns the quantitative survey.

1.5 The quantitative research survey comprised of two main waves:

- Wave 1 – Representative survey of all eligible non-household customers.
- Wave 2 – Conducted with customers who have either switched retailers or renegotiated with their retailer.

1.6 Information about the two separate 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 sample of all types and sizes of businesses, charities and public-sector organisations in England (also including eligible high water users in Wales) and to investigate their experiences interacting with the newly opened market.

1.8 The survey was carried out by telephone over an 8-week period between 8th March and 5th June 2019 and included questions on the following topics:

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

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 1,000 full interviews were achieved overall.

The Sample

1.10 The sample comprised registered businesses, charities and public-sector organisations based wholly or mainly in England. It was 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 Ml or more per 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, but is now known as Hafren Dyfrdwy) will only be able to switch if they use 50 Ml of water a year at their property. These eligible Welsh customers were identified with help from Dŵr Cymru for inclusion in the research. The first wave of the survey is therefore representative of all eligible non-household customers in England and Wales.

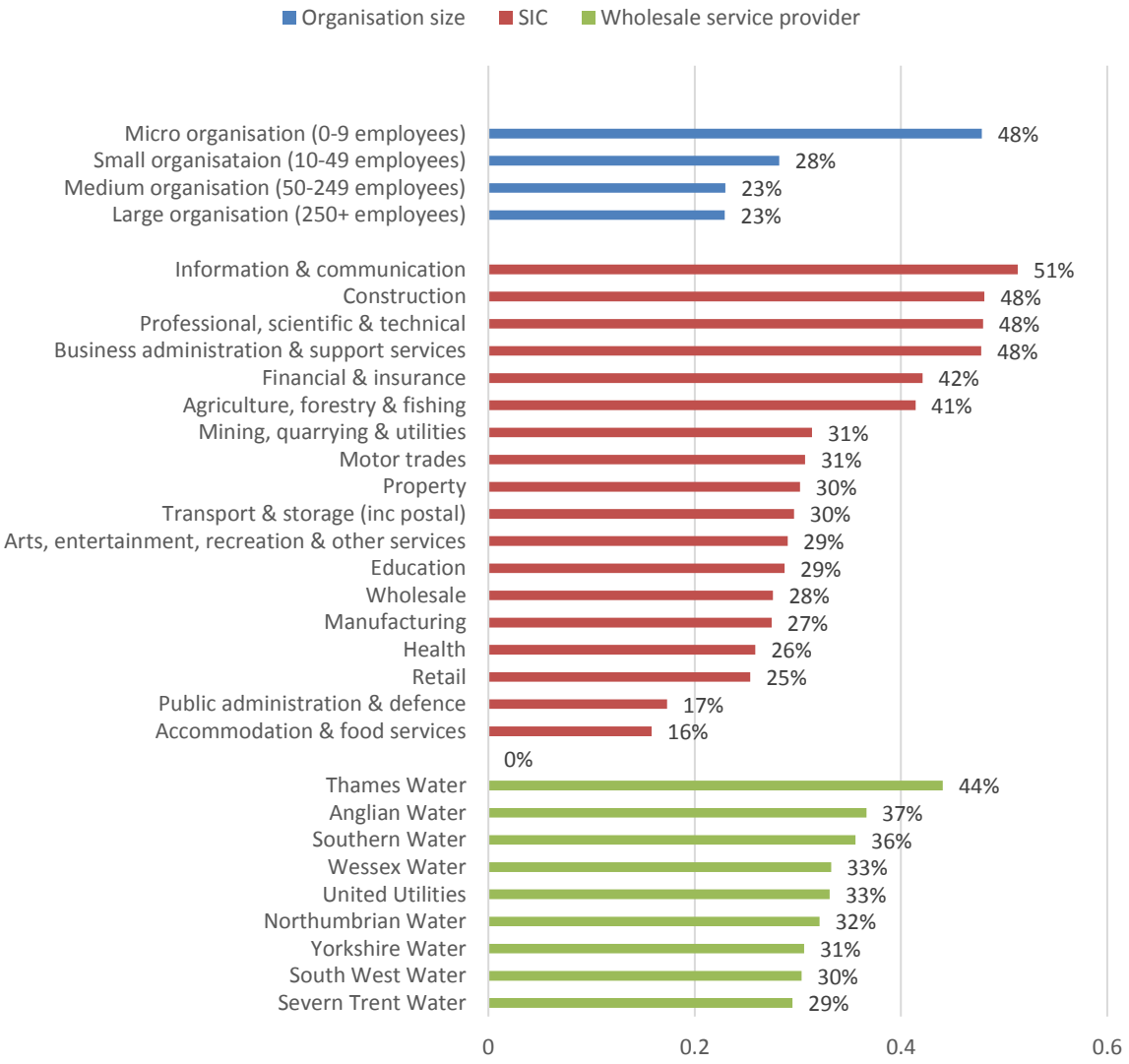
1.12 Not all businesses, charities and public-sector organisations are eligible to switch water and/or wastewater retail services in the open market. The organisation must operate from a business premises, pay business rates, and not use a household water supply (i.e. those who run a business from their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

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.

1.14 It is important to note that eligibility was assessed on the raw contact sample, which reflected the sample design (i.e. intentionally did not match the profile of the overall population). The figures quoted in this section are based on unadjusted data. However, when the eligibility was applied to the final achieved sample, it was weighted in order for it to appropriately reflect the differences by size, sector and region.

Figure 1: Ineligibility of organisations in the contact sample (unadjusted)



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

1.16 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

1.17 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.

1.18 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.

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

Profile Tables

1.20 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	273.3	48%	129.4	11%	110	11%	11%
Northumbrian Water	71.6	58%	41.2	3%	111	11%	4%
Southern Water	238.9	52%	123.9	10%	114	11%	10%
Severn Trent Water	340.6	58%	195.7	16%	112	11%	17%
South West Water	72.6	58%	42.1	3%	107	11%	4%
Thames Water	786.6	51%	397.5	33%	117	12%	30%
United Utilities	260.4	56%	145.8	12%	104	10%	12%
Wessex Water	83.4	51%	42.8	3%	105	11	4
Dŵr Cymru Welsh Water	<0.1	100%	<0.1	*%	8	1	*
Yorkshire Water	174.7	59%	103.1	8%	112	11	9
Total	**2,302.0**	**53%**	**1221.58**	**100%**	**1,000**	**100%**	**100%**

Size of Organisation	Population				Survey Responses		
	Total orgs	% eligible	Eligible organisations		Unweighted		Weighted
	Thousands		Thousands	%	Number	Valid %	Valid %
Micro (1-9 employees)	2059.5	51%	1055.2	86%	321	33%	84%
Small (10-49 employees)	197.5	69%	136.5	11%	288	29%	13%
Medium (50-249 employees)	34.5	73%	25.0	2%	196	20%	2%
Large (250+ employees)	6.7	72%	4.8	*%	179	18%	*%
Not known	-	-	-	-	16	-	-
Total	**2,298.1**	**53%**	**1,221.6**	**100%**	**1,000**	**100**	**100**

Type of Organisation	Population		Survey Responses		
	Total organisations		Unweighted		Weighted
	Thousands	%	Number	Valid %	Valid %
Agriculture, forestry & fishing	50.8	4%	32	3%	5%
Mining, quarrying & utilities	4.7	*%	3	*	*
Manufacturing	61.8	5%	140	14%	5%
Construction	152.6	12%	52	5%	10%
Motor trades	34.2	3%	42	4%	3%
Wholesale	48.0	4%	38	4%	4%
Retail	91.8	8%	94	9%	11%
Transport & storage (inc postal)	51.6	4%	29	3%	5%
Accommodation & food services	66.9	5%	57	6%	7%
Information & communication	107.2	9%	26	3%	6%
Financial & insurance	27.1	2%	26	3%	2%
Property	45.3	4%	30	3%	6%
Professional, scientific & technical	221.7	18%	93	9%	13%
Business administration & support services	106.1	9%	43	4%	8%
Public administration & defence	2.8	*%	9	1%	*
Education	21.0	2%	110	11%	2%
Health	50.1	4%	95	10%	5%
Arts, entertainment, recreation & other services	77.8	6%	81	8%	7%
Not known	-	-	-	-	-
Total	**1221.6**	**100%**	**100%**	**100%**	**100%**

Interpretation of the Data

1.21 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.

1.22 Where differences between surveys (or, for example, demographics groups) 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.

1.23 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.

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

1.25 Graphics are used extensively in this report to make it as user friendly as possible. The pie charts and other graphics show the proportions (in percentages) of residents making relevant responses, and, where appropriate, they indicate positive responses in green and negative responses in red.

The Survey of Customers who had Switched or Renegotiated retailers (Wave 2)

Data Source

1.26 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 of March 2019. As an organisation might have multiple premises, ORS used the information MOSL provided and sought to remove cases where a single organisation appeared multiple times (by virtue of having different premises and/or supply points), effectively going through a process of de-duplication. This provided a unique list of organisations that had undertaken one or more switching activity and serves as a reasonable profile of the entire population of switchers as of March 2019.

1.27 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

1.28 The survey was carried out by telephone over a 5-week period between 4th April and 5th June 2019. In total, 1,005 full interviews were completed with organisations that had switched retailer.

1.29 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:

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

The Sample

1.30 In order to maximise the sample size for findings about the experience of switching and renegotiating, responses from organisations who had been identified as switching or renegotiating in the Representative survey wave, were also included in these results.

Weighting

1.31 Once the population of switchers had been determined (based on the deduped MOSL database), 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).

1.32 The MOSL database does not contain any data about any renegotiations that organisations have attempted with their retailer. Using the estimate from the population survey of the incidence of organisations that had renegotiated (but not switched retailer) in each water and sewerage region, an estimate was made of the population of organisations that had only renegotiated. This was combined with the population derived from the MOSL data to create an entire population by area of organisations that had either switched, renegotiated or both.

1.33 Responses from organisations that had been identified as having switched or renegotiated with their retailer in the representative survey (111 cases), were combined with responses of the 1,005 switchers to yield an overall sample of 1,116.

Activity		From MOSL sample	Included from Representative Survey	Total
Switched only		838	49	931
Renegotiating only		0	41	41
Both (Switched and renegotiated)	Switched most recently	76	13	89
	Renegotiated most recently	45	7	52
	Don't know most recent	2	1	3
	Total	**1,005**	**111**	**1,116**

1.34 Results were subsequently weighted so that each region had an appropriate influence on the overall result and was representative of the overall population of switchers and renegotiators.

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

Profile Tables

1.36 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	Survey Responses			
	Unweighted		Weighted	Population
	Number	%	%	%
Anglian Water	125	11	15	15
Northumbrian Water	117	10	2	2
Southern Water	134	12	11	11
Severn Trent Water	129	12	17	17
South West Water	116	10	2	2
Thames Water	129	12	34	34
United Utilities	129	12	7	7
Wessex Water	116	10	4	4
Dwr Cymru Welsh Water	1	0	0	0
Yorkshire Water	120	11	8	8
Total	1,116	100	100	100

Size of Organisation	Survey Responses		
	Unweighted		Weighted
	Number	Valid %	Valid %
Micro organisation (0-9 employees)	665	60	59
Small (10-49 employees)	289	26	27
Medium (50-249 employees)	89	8	9
Large organisation (250+ employees)	63	6	6
Not known	10	-	-
Total	1,106	100%	100%

Type of Organisation	Survey Responses		
	Unweighted		Weighted
	Number	Valid %	Valid %
Agriculture, forestry & fishing	25	2	2
Mining, quarrying & utilities	3	0	0
Manufacturing	126	11	12
Construction	34	3	3
Motor trades	65	6	5
Wholesale	55	5	5
Retail	130	12	12
Transport & storage (including postal)	14	1	1
Accommodation & food services	169	15	13
Information & communication	17	2	2
Financial & insurance	9	1	1
Property	22	2	2
Professional, scientific & technical	74	7	7
Business administration & support services	37	3	4
Public administration & defence	5	0	1
Education	67	6	7
Health	58	5	5
Arts, entertainment, recreation & other services	202	18	18
Not Known	4	-	--
Total	**1,112**	**100%**	**100%**

Interpretation of the Data

1.37 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.

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

1.39 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.

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

1.41 Graphics are used extensively in this report to make it as user friendly as possible. The pie charts and other graphics show the proportions (in percentages) of organisations' relevant responses, and, where appropriate, they indicate positive responses in green and negative responses in red.

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 2017-18 surveys conducted with all eligible non-household customers (Wave 1 in 2017), and the non-household customers who had switched retailer (Wave 2 in 2018). 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[1].

Awareness of the Changes

2.3 More than half (53%) 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 signifies a significant increase of 4% points in awareness since the 2017 survey (48% in 2017). However, just under half (47%) of customers were still not aware of the changes at the time of the 2019 survey.

2.4 In terms of which customers are more or less aware, SME and large organisations remain most likely to be aware of the changes – and are significantly more likely to be so (61% and 65% respectively, compared to 53% overall). However, the proportion of large organisations aware of the changes is smaller than in 2017 (89% in 2017 vs 65% in 2019).[2]

2.5 Customers in Agriculture, forestry and fishing, wholesale and property services, are significantly less likely to be aware of the changes to the water retail market.

Overall Satisfaction

2.6 The level of overall customer satisfaction with current retailers (80%) is in-line with results from the 2017 survey (76%). 8% were dissatisfied. SME and large organisation customers, as well as those in the financial and insurance, motor trades, and education industries are significantly less likely to be satisfied with their current retailer.

2.7 The most frequent reason given by customers for being dissatisfied with their current clean water and waste water retailer services was billing issues (60%), followed by customer service (48%).

2.8 Comparatively, four fifths (80%) of switchers and renegotiators were satisfied with their current retailers(s), with only 9% saying they were dissatisfied. Those in the Southern Water region and who

[1] https://www.open-water.org.uk/uploads/2017/01/2016-01-19-OFWAT-Customer-Awareness-Survey-Final-Report-5-1.pdf

[2] It is worth noting that, although this is an unexpected finding, a possible explanation could be that this is related to the greater turnover of staff within larger companies, and the potential responsibility for decisions on utilities to sometimes be transferred between different departments or roles. This is in comparison to smaller companies, whereby knowledge of company decisions surrounding utilities would usually be restricted to a small group of decision makers (such as a Managing Director, Chief Executive or Finance Director) who normally remain in-post for longer and might all be aware of any decisions around utilities.

spend £2000-£9,999 on clean water and waste water services per annum reported significantly lower satisfaction with their retailer than average.

2.9 While overall satisfaction with the current retailer differed between all customers, as well as switchers and renegotiators with certain demographic characteristics, specific experiences in the market were also correlated with overall retailer satisfaction. In particular, customers overall, as well as switchers and renegotiators 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. Those who experienced problems with their retailer were subsequently significantly less likely to be satisfied.

2.10 Switchers who reported using a price comparison website were significantly more likely to be satisfied with their current retailer, whereas those who had direct contact with another retailer (and who are likely to have only obtained 1 or 2 quotes from retailers) are significantly more likely to be dissatisfied with them. Likewise, switchers who only received price quotations from a single retailer were significantly less likely to be satisfied.

2.11 Those switchers and renegotiators who consolidated water retail services with any of their other utilities (e.g. electric, telephone or gas) into a single bill were significantly less likely to be satisfied with their retailer.

2.12 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 (such as price, service or bill consolidation) or felt they were worse off were significantly more likely to be dissatisfied.

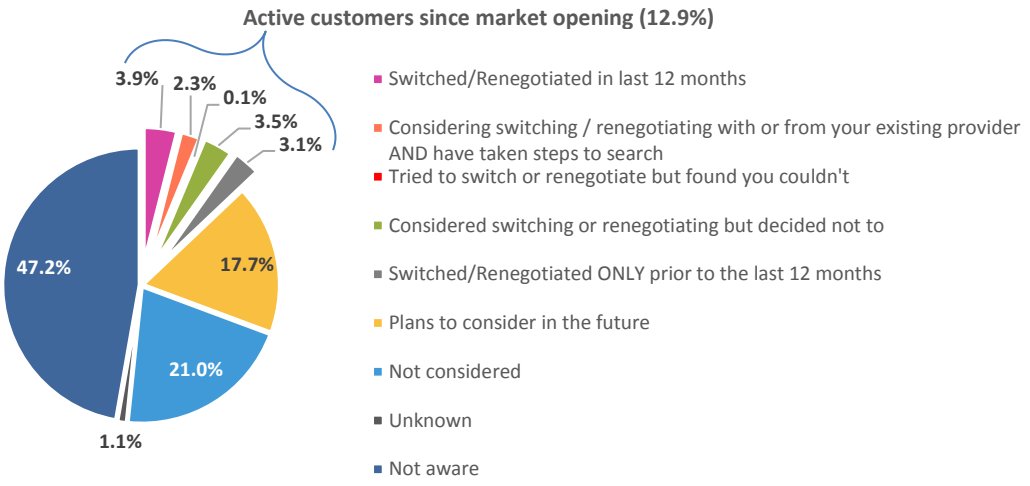
2.13 Switchers who felt that the benefits of switching met their expectations were significantly more likely to be satisfied with their retailer.

Market Engagement

2.14 In the Figure 2 overleaf, we can see that 12.9% of all customers are “active” in the market (by “active” we mean those who have switched or renegotiated since April 2017, those who are actively considering switching or renegotiating, those who had tried to switch or renegotiate and failed, or those who had considered switching or renegotiating and decided not to).

2.15 7% of customers have actually switched or renegotiated, with 3.9 in the last 12 months and 3.1 % longer ago; 2.3% are currently actively considering switching or renegotiating. 3.5% have considered switching or renegotiating but decided not to, only 0.1% tried but failed. 17.7% said that they plan to consider switching or renegotiating in the future. However, around one fifth (21%) have not considered switching and almost half (47.2%) were unaware of the changes to the market.

Figure 2: Which of the following scenarios best applies to your organisation?



Base: All Customers (1,000)

2.16 Larger organisations are significantly more likely to be 'active customers' (i.e. those who have switched retailers/renegotiated, are actively considering switching/renegotiated, had tried to switch and failed or considered switching and decided not to) and to have either switched or renegotiated in the last 12 months. They are significantly more likely to be aware of changes to the market (65%).

Searching and Comparing

2.17 Of those customers who switched or renegotiated, or actively considered switching or renegotiating, around a third (34%) used a broker to search for information about alternative retailers or had made direct contact with another retailer (21%). Internet research was also prevalent; 11% said they used a retailer's website, 5% said they undertook general internet research, and 3% (17 customers) reported having used a price comparison website.

2.18 Out of all customers who searched for information on alternative retailers, over four fifths (85%) found it easy to find the information they needed (27% found it very easy); 8% found it difficult. 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 (95%).

2.19 Similarly, more than fourth fifths (85%) of switchers and renegotiators said it was easy to find the information they needed when searching for information on alternative retailers, whereas 7% found it difficult. In contrast to the survey of all customers, the main reason given for why switchers and renegotiators found it difficult to find the information they needed was because the information was not clear or that they found it difficult to understand (53%). One third (33%) stated that they were not able to access information online, by phone or via any other preferred method, while a fifth (20%) said that the information they found was not relevant.

2.20 With regards to comparing the different retailers, while two fifths (40%) 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, whereas just under a third (30%) found this difficult. The most frequent reason given for why this was difficult was that they did not have enough time to compare retailers.

2.21 A higher proportion of successful switchers and renegotiators suggested it was easy to compare retailers than active customers overall (72% compared to 40% respectively). Around 1 in 10 (11%) said they found this difficult.

2.22 The main drivers for customers actively considering or who have considered switching or renegotiating to start looking into switching or renegotiating were incentives and cashback (44%) and a lower price/bill (23%).

2.23 Comparatively, the reasons for starting to look into switching priorities of switchers were fairly similar to those of customers overall. Among switchers, a lower price/bill (52%) was the most important factor in driving them to start looking into switching. However, a fifth reported that being contacted by a broker and supplier to see if they were interested in switching was the next most common driver. Unlike active customers overall, cashback and incentives were only considered a driver by 1% of switchers.

2.24 Over two fifths of those customers who had actively considered switching but had decided not to (which accounts for 4% of organisations) did so because they felt that the savings were minimal (43%). Just over one third thought that it was too much effort to switch (34%), and just under one (32%) third took the view: 'better the devil you know.'

2.25 For those customers who had not yet considered switching, almost a third said that they intended to in the future, but hadn't got around to it yet (30%); around a fifth stated they are happy with their current retailer (22%), or that is was simply too much effort, or no point to switching (18%).

2.26 For the majority of customers, a reduction in their annual water bill would encourage them to switch or consider switching retailer. Of these customers who would consider switching, just over one in ten (11%) of customers said a reduction of 1%-5% would encourage them to switch their retailer. Over one third (35%) of customers said between 6%-10% would be sufficient. Around one in twenty (6%) of customers said they would need a reduction of 11%-15%. Larger organisations in comparison to SMEs, were more likely to only need a reduction of between 1%-5%.

2.27 Lower price is certainly the main driver for a customer considering whether they should switch retailer or not. Three quarters of customers who were unaware of the option to switch retailer or who are not yet considering switching or renegotiating said that nothing other than a percentage reduction to their annual water bill would encourage them to do so.

The Process of Switching or Renegotiating

2.28 Switchers and renegotiators took different approaches to exploring the market before acting.

2.29 There was a considerable difference between switchers and renegotiators in terms of how many retailers they contacted prior to making their decision; nearly three quarters (74 %) of renegotiators contacted two or more retailers, compared to less than two fifths (39%) of switchers.

2.30 As mentioned above, a lower price/bill (52%) was the most important factor in driving switchers to start looking into switching. However, organisations with 10 or more premises were more likely to cite other motivations for switching, such as consolidated billing – i.e. combining all charges into one monthly bill – (52%) or better customer service (30%). Nearly a third (32%) of customers with 10+ premises said that consolidating billing across multiple sites was a motivator and around a fifth (19%) cited consolidating billing for clean and waste water services.

2.31 Like switchers, renegotiators cited a lower price/bill as the main driver for seeking to renegotiate.

Arranging a Switch

2.32 For the most part, retailers offered prices on a take it or leave it basis (71%), with fewer than a fifth of switchers having negotiated prices with their new retailer (17%). 12% ran a formal tender process.

2.33 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 5 (18%) had pro-actively approached their retailer about the possibility of a better deal. Only 1 in 20 (6%) were contacted by their old retailer before signing up to their new retailer, and even fewer were approached after already having agreed to switch. This suggests that retention activities of retailers are low.

Switching

2.34 The majority of customers who switched did so via direct contact with their new retailer or by using the retailer's website. Around two fifths (39%) of all switchers reported using a broker or consultant to make the switch.

2.35 Once they had actually chosen the retailer they wanted to switch to, almost all (93%) found the actual process of switching easy, with 65% finding it very easy. Only 1 in 20 found the process difficult. Large organisations were significantly more likely than average to report that the process of switching retailers was difficult, as were customers who were consolidating bills. The same trend, perhaps unsurprisingly, was seen among customers with 3 or more premises.

2.36 Nine in ten switchers (90%) were satisfied with the amount of time taken for the switchover to a new retailer to take place; around 1 in 20 (6%) were dissatisfied. Customers with three or more premises, those who had consolidated billing as part of the switch and those who expressed dissatisfaction with their current retailer were all more likely to have been dissatisfied with the length of the switching process.

2.37 When switching providers, a variety of contract lengths were chosen. 31% of customers had signed up for a 1-2 year contract, with a quarter (25%) choosing a 2-3 year contract and less than two fifths (18%) of switching customers taking on a contract of three years or more.

2.38 More than half (52%) of switching customers said that their new retailer did not commit to any specific benefits at all. However, two fifths (40%) reported that they had committed to providing lower prices.

2.39 Around four fifths (84%) of switchers reported that the benefits they received either met or exceeded their expectations. 1 in 20 (5%) said that their expectations had not been met and around 1 in 10 (9%) responded that they were not able to answer that question yet.

2.40 Of those whose expectations were not met, the majority cited prices being more expensive than expected. A quarter felt customer service had been poor.

2.41 Savings found in the survey of switchers were modest. Of those switchers who had expected to or had seen a reduction in their bills, around a third had not seen or expected no reduction in their bills. Otherwise, around two fifths expected or had seen a reduction of between 1-10%.

2.42 As a result of switching, less than 1 in 20 switchers reported that they now receive any new water efficiency or leak detection services from their new retailers compared to those received previously.

2.43 Even after switching, the majority of switchers found that that quality of retail services was about the same (63%). Around a quarter (23%) stated that these services had improved and around 1 in 10 (11%) said that there had actually been a reduction in quality.

2.44 Of those switchers with more than one premise, just over a quarter had consolidated their water bill across multiple premises into a single bill. Less than 1 in 20 (4%) had consolidated their water bill with other utilities into a single bill. This suggests that there is more potential in the market for consolidated billing than is currently realized.

2.45 Around a fifth (19%) of switchers reported that since switching they had saved time dealing with their water bills each cycle. The majority of these (61%) reported saving less than half an hour of time each month. Almost 3 in 10 (29%) of these reported saving over an hour each month.

2.46 On the other hand, around one in ten (12%) switchers reported that since switching they had lost time dealing with their water bills each cycle. Of these, almost 3 in 10 (28%) reported losing over an hour a month.

2.47 The majority (69%) of switchers said that switching was worthwhile. However, just under a fifth (18%) felt it was not worthwhile – 11% strongly disagreed it was worthwhile.

2.48 Those in the Motor Trades and were significantly more likely to disagree that switching was worthwhile, as were micro-organisations. SMEs and large organisations were significantly more likely to agree switching was worthwhile.

Renegotiating

2.49 When renegotiating most recently, chosen contract lengths varied. Around 3 in 10 (30%) renegotiators signed up for a 2-3 year contract; a quarter (25%) chose a 1-2 year contract and a further quarter (25%) signed a contract of three years or more. Around 1 in 6 (17%) renegotiators were on a rolling contract with no fixed term.

2.50 Like switchers, around two fifths (43%) of renegotiators reported that their retailer committed to providing lower prices. However, a lower proportion of renegotiators (36% vs 52% of switchers) said that their retailer did not commit to any specific benefits at all. This suggests that renegotiators are realizing more benefits than switchers.

2.51 Around 9 out of 10 (89%) renegotiators reported that the benefits they received either met or exceeded their expectations. 3% said that their expectations had not been met and around 1 in 12 (8%) responded that they were not able to answer that question yet. However, more than half expected or had seen a reduction of between 1-10%.

2.52 A significantly higher proportion of renegotiators (22%) than switchers (4%) reported receiving new water efficiency or leak detection services as a part of their new deal.

2.53 After renegotiating, the majority found that that quality of retail services was about the same (78%). 14% stated that these services had improved and around 1 in 20 (6%) said that there had been a reduction in quality.

2.54 The majority (85%) of renegotiators said that doing so was worthwhile. Only 4% felt it was not worthwhile.

Problems, complaints and contact

2.55 Around 1 in 20 customers overall (6%) have experienced problems with their clean or waste water services over the last 12 months and almost all (99%) of them reported the problem to their provider. Around a quarter of problems (24%) related to customer service and billing issues, while around a fifth (21%) related to problems on their premises (such as pipe leaks and supply interruptions).

2.56 A similar proportion (7%) of switchers and renegotiators had also experienced problems with their services in the last 12 months. Around 9 in 10 (89%) reported the problem to their provider. Around a third of problems were to do with customer service (35%) or involved problems on their premises (such as pipes leaks, supply interruptions) (32%).

2.57 Around a quarter of all customers who experienced problems felt they had a very serious impact on the business. However, 7 in 10 customers felt they had either not had a very serious impact, or no impact at all. A similar proportion of switchers and renegotiators felt the problems experienced had a very serious impact on the business; a further third felt they had a fairly serious impact on the business.

2.58 Of those customers that reported the problem to the provider, half said the issue had not been resolved. Slightly fewer reported the issue to have been resolved by the provider (46%). In the cases where the issue was resolved (46%), or re-directed to another organisation (5%), the vast majority found the process to have been easy. In the cases where the process had been difficult, poor customer service was the predominant complaint.

2.59 When reporting the problem to the provider, less than half of customers (43%) were satisfied with the contact they had with the provider. Over a third were dissatisfied (35%) with 31% being very dissatisfied.

2.60 Switchers and renegotiators had a slightly different experience to customers in general. Only a quarter of these reported that the issue had not been resolved. However, over a third (36%) said they had been redirected to another organisation. The same proportion (36%) reported that the issue had actually been resolved. In the cases where the issue had been resolved, a similar proportion (around two fifths) reported finding the process easy as difficult. However, in the cases where the process had been difficult, poor customer service was the predominant complaint – as was the case for customers overall.

2.61 Like customers overall, less than half (43%) of switchers and renegotiators were satisfied with the contact that they'd had with the provider when reporting the problem. However, more than half (51%) were dissatisfied with the contact.

2.62 Slightly more switchers and renegotiators compared to customers overall (15% vs 9% customers overall) had contacted their provider or any other organisation regarding an enquiry about their water service in the last 12 months. Around half of their enquiries related to billing (54% switchers and renegotiators' 46% customers overall). Similar proportions of switchers and renegotiators to customers overall were satisfied (63% vs 65% customers overall) and dissatisfied (31% for both) with the contact overall.

Overall Customer Views of the Water Market

2.63 When asked what is most important to them as a water customer, customers overall as well as switchers and renegotiators highlighted the same priorities - a reliable water supply and price.

2.64 For customers overall, those with only one premise were significantly more likely to report a reliable water supply as being important to them. Those with more than 10 premises, or large organisations were significantly more likely to say that price was important to them.

2.65 Similar proportions of customers overall and switchers and renegotiators are satisfied with the water market as a whole - 64% and 65% respectively.

2.66 However, customers in the South West and Yorkshire Water regions, as well as those in accommodation and food, and education services, and those in large organisations are all significantly more likely than average to be dissatisfied. Switchers and renegotiators in the property sector as well as those with more

than 10 premises are significantly less likely to be satisfied with the water market as a whole, and those in the education sector are also significantly more likely to be dissatisfied.

Highlighting main differences between switchers/renegotiators and the overall population

2.67 A significantly higher proportion of successful switchers and renegotiators suggested it was easy to compare retailers than active customers overall (72% compared to 40% respectively).

2.68 Regarding motives for looking into switching/renegotiating, overall, just under a quarter (23%) of customers actively considered switching or renegotiating or who considered doing this reported a lower price/bill to be a driver. This is significantly lower than for those customers who were switchers (52%) or renegotiators (62%). Moreover, unlike active customers overall (44%), cashback incentives were only considered a driver by 1% of switchers.

2.69 Significantly more customers overall had not had their reported problems resolved (50%) in comparison to switchers /renegotiators (25%). However, there was no significant difference in the number of customers overall and switchers/renegotiators who were satisfied with the contact they experienced with their provider when reporting a problem.

2.70 Significantly more switchers/renegotiators (15%) had contacted their provider or any other organisation regarding an enquiry about their water service in the last 12 months, compared to customers overall (9%).

Differences between Switchers and Renegotiators

2.71 There a was significant difference between switchers and renegotiators in terms of how many retailers they contacted prior to making their decision, with 74% of renegotiators having contacted two or more retailers, compared to less than two fifths (39%) of switchers.

2.72 Like switchers, around two fifths (43%) of renegotiators reported that their retailer committed to providing lower prices. However, a significantly lower proportion of renegotiators (36% compared to 52% of switchers) said that their retailer did not commit to any specific benefits at all. This suggests that renegotiators might be realising more benefits than switchers.

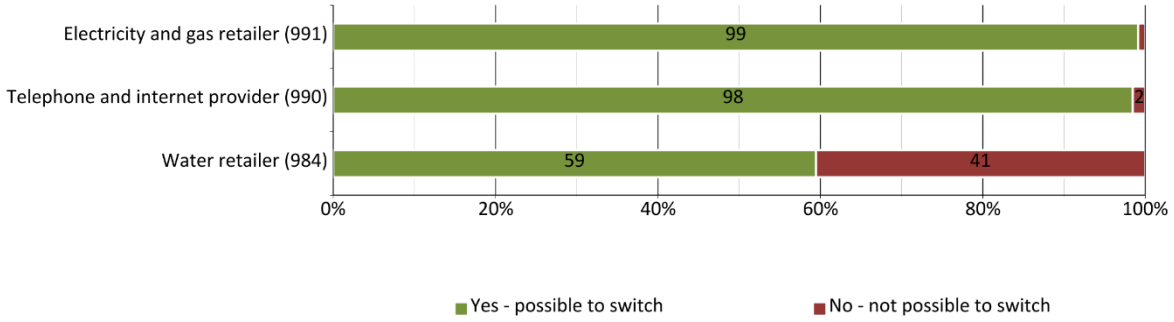
2.73 A significantly higher proportion of renegotiators (22%) than switchers (4%) reported receiving new water efficiency or leak detection services as a part of their new deal.

3. Survey of all Non-Household Customers

Results from Quantitative Telephone Survey

Awareness of changes

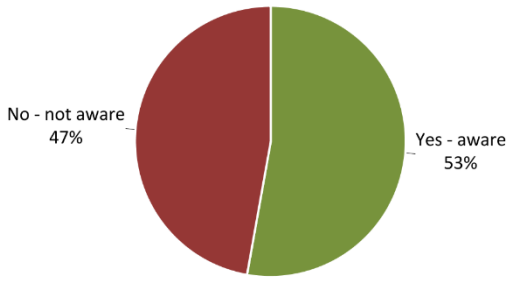
Figure 3: In general, do you think it is possible or not possible for organisations in England to switch their telephone and internet provider, their electricity and gas retailer, or their water retailer?



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

3.1 In Figure 3, we can see that the vast majority of eligible customers thought it was possible to switch their electricity and gas retailer (99%) and telephone and internet provider (98%), whereas just under three fifths (59%) thought that they could switch their water provider. In 4 we can also see that half (53%) of customers were aware, prior to taking part in the survey, that they have been able to change which company supplies their clean and waste water retail services. This is a significant increase (4 percentage points) in comparison to the 2017/18 survey (48%).

Figure 4: 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?



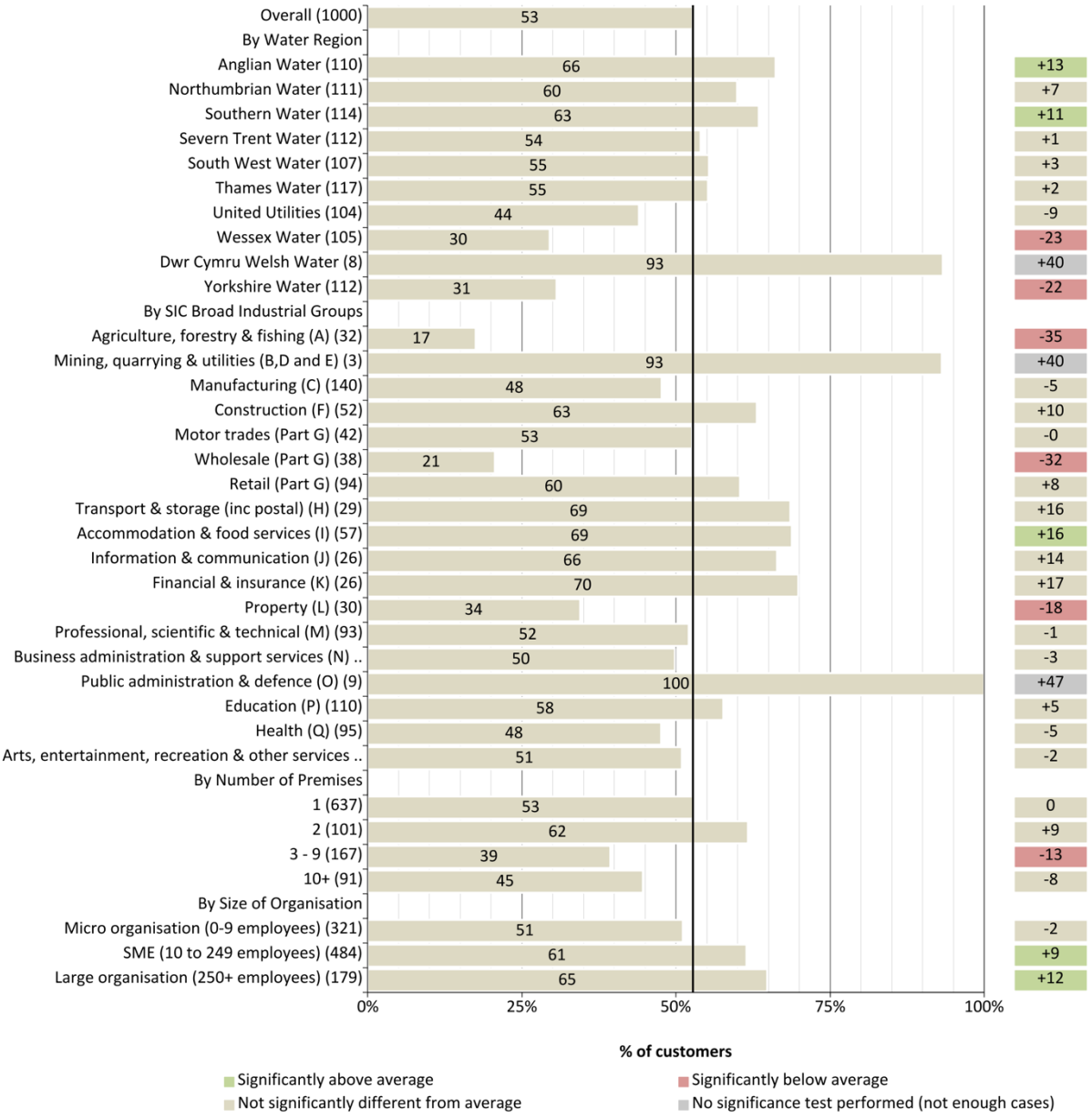
Base: All customers (1,000)

3.2 Figure 5 shows how levels of awareness vary by sub-group. Customers in the water regions of Anglian Water and Southern Water, along with those in accommodation and food services, are significantly more likely to be aware of the changes. Note that the black line indicates the overall percentage.

3.3 It should be noted that SME (10-249 employees) and large organisations (250+ employees) are significantly more likely to be aware of the changes. For example, 65% of large organisations, and 61% of SME customers were aware, whereas only 51% of micro businesses were aware.

3.4 Customers in the water regions of Wessex Water and Yorkshire Water, as well as those in the agriculture, forestry and fishing, wholesale and property industries are also significantly less likely to be aware of the changes to the water retail market. Furthermore, businesses with 3-9 premises were significantly less likely to have any awareness of changes to the water market.

Figure 5: 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?

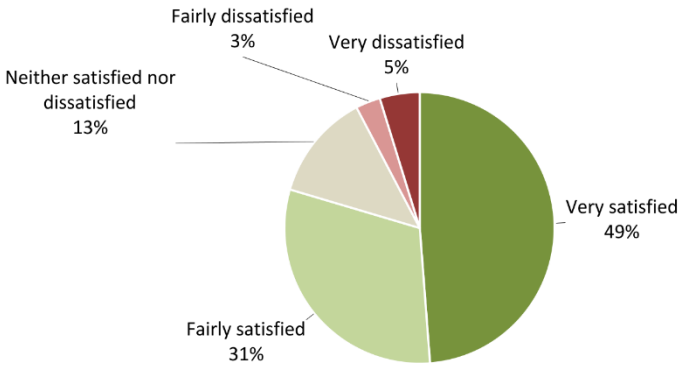


Base: All customers (number of customers is shown in brackets)

Overall Satisfaction

3.5 Customers were asked overall how satisfied or dissatisfied they are with their current clean water and waste water retailer(s). Four fifths (80%) were satisfied with their current retailer, with only 8% saying they were dissatisfied. Satisfaction levels are up 3 percentage points (from 77% the previous year), although this increase is not statistically significant.

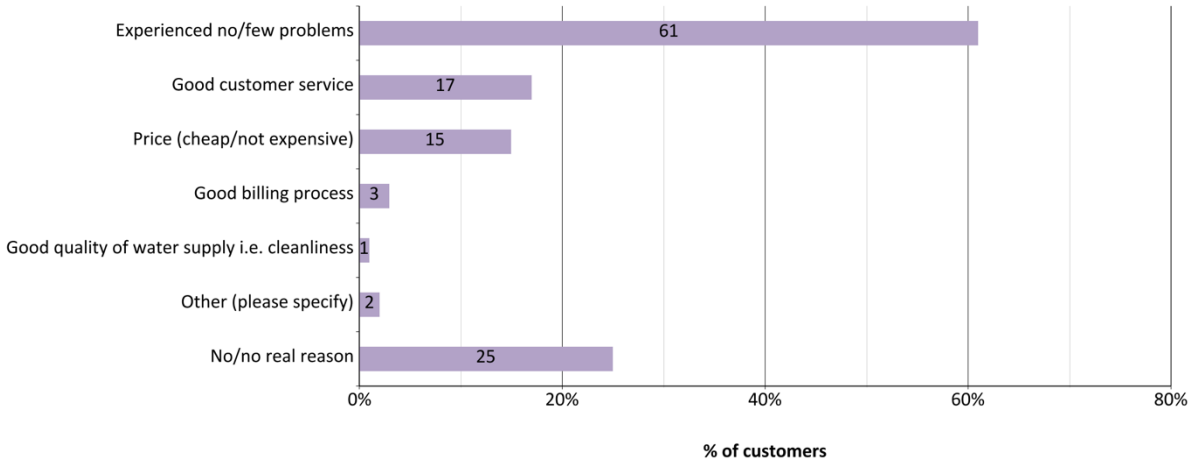
Figure 6: Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?



Base: All customers (991)

3.6 Below we can see Figure 7 shows that, of those customers who were satisfied with their current retailer, around three fifths (61%) found they had experienced no/few problems. Less than a fifth thought the customer service was good (17%) or that the price was cheap/inexpensive (15%), but a quarter (25%), could think of no reason for their satisfaction.

Figure 7: What are the reasons for satisfaction?



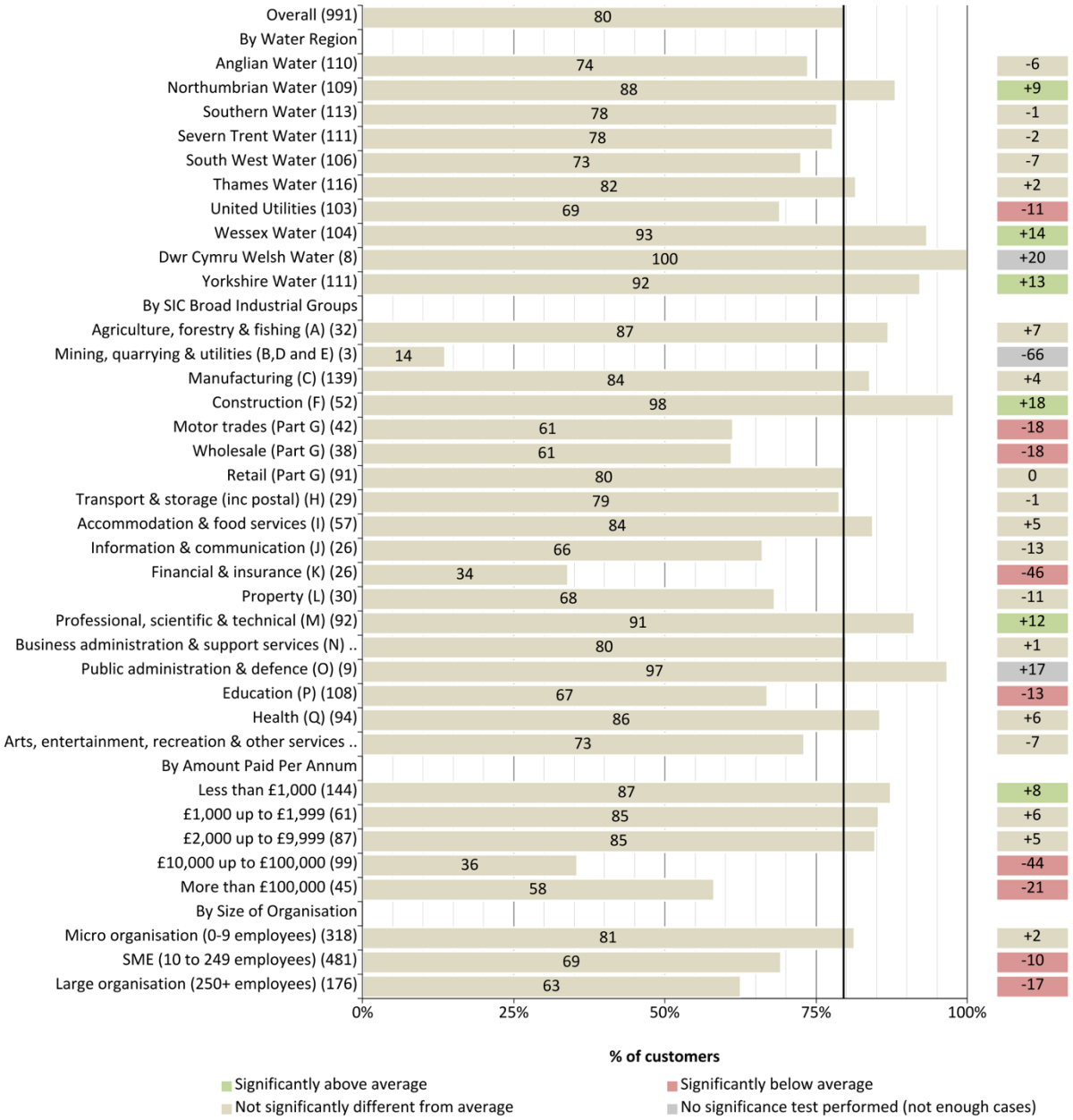
Base: All customers who said they were satisfied with their current clean water and waste water retailer (737)

3.7 While satisfaction with overall service is generally high, Figure 8 shows how levels of satisfaction with water and waste water retailers varied by sub-group: customers who are in the water regions of Northumbrian Water, Wessex Water, or Yorkshire Water are significantly more likely to be satisfied with their overall service, whilst those in region for United Utilities are significantly less likely to be satisfied.

3.8 Customers in the construction and professional, scientific and technical industries, are significantly more likely to be satisfied with the overall service they currently receive. Conversely, customers in the financial and insurance, motor trades, wholesale and education industries are significantly less likely to be satisfied with their current retailer.

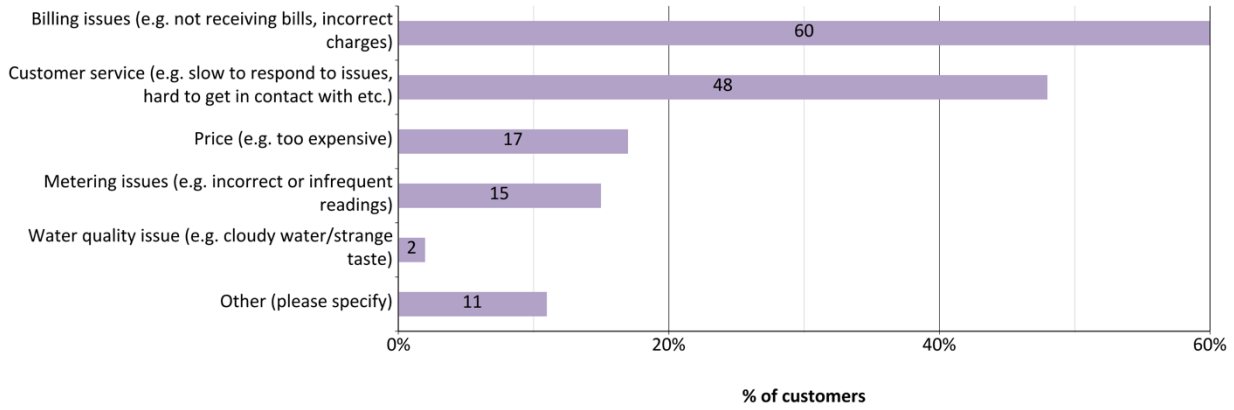
3.9 Furthermore, those customers who spent less than £1,000 per annum were significantly more satisfied with their retailer, whereas customers who paid more than £10,000 per annum, along with both SME and large organisations, were significantly more likely to be dissatisfied with their retailer.

Figure 8: Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?



Base: All customers (number of customers shown in brackets)

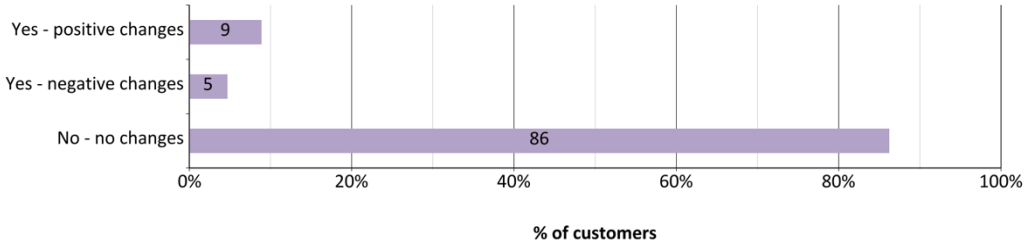
Figure 9: Why were you dissatisfied?



Base: All dissatisfied customers (106)

3.10 Looking into the reasons why customers were dissatisfied with their current water retailer, we can see from Figure 9 that the most frequent reason was billing issues (60%), which included customers not receiving bills or being charged incorrectly. However, it is important to note that this has decreased significantly by 14 percentage points when compared with 2017/18. Customer service issues were the next most common reason for dissatisfaction (48%), which included retailers being slow to respond to issues or being hard to get in touch with. However, once again, this was significantly lower than the previous year by 15 percentage points (63% in 2017/18). We can also see that 17% thought prices were still too expensive (although this is not a statistically significant increase from the previous) and that metering issues (15%) such as incorrect or infrequent readings caused the customers' dissatisfaction.

Figure 10: Since the water market was opened to competition in April 2017, have you noticed any positive or negative changes in the way you receive water services?

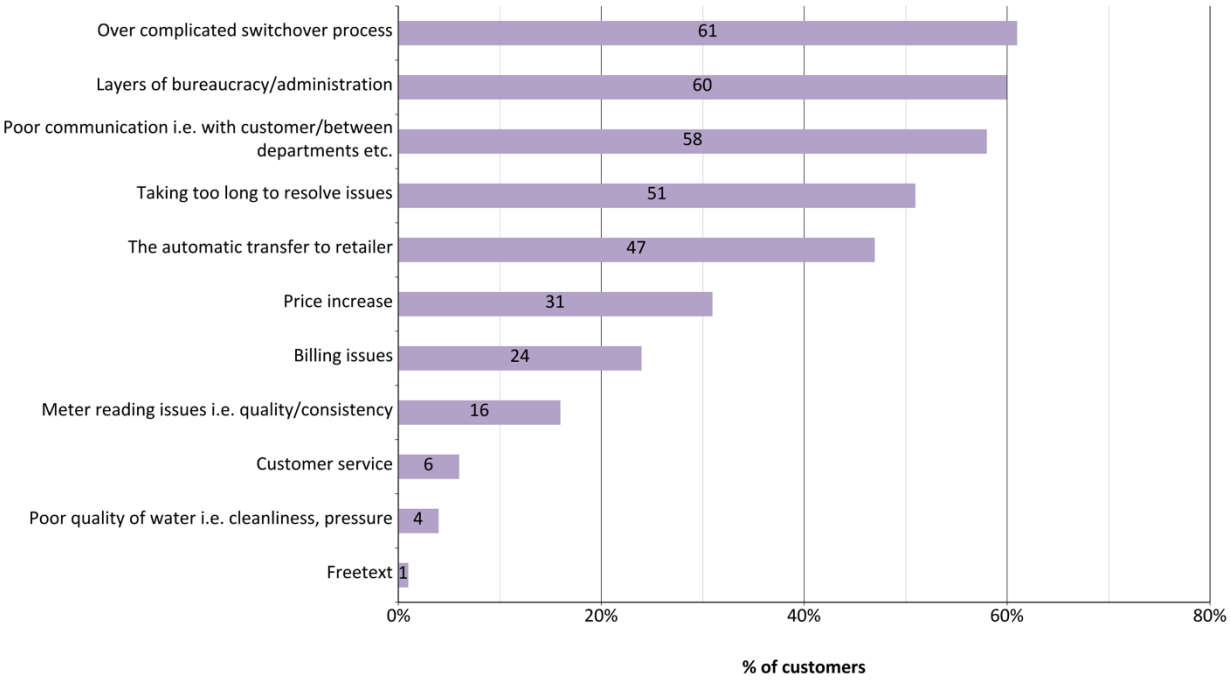


Base: All customers who were aware of the possibility to switch or renegotiate (618)

3.11 Looking into how customers perceived changes in the way they had received their water services since market opening, more than four fifths (86%) thought there had been no changes since April 2017. Just under one in ten (9%) thought there had been positive changes and 5% thought there had been negative changes.

3.13 Of the customers who have seen a positive change since 2017, over two fifths (43%) considered being able to get a cheaper deal elsewhere as one. Just under one eighth (11%) of customers thought that better billing was a positive change they had seen, and only 1% said that the positives changes were due to better customer service.

Figure 11: What are the negative changes?

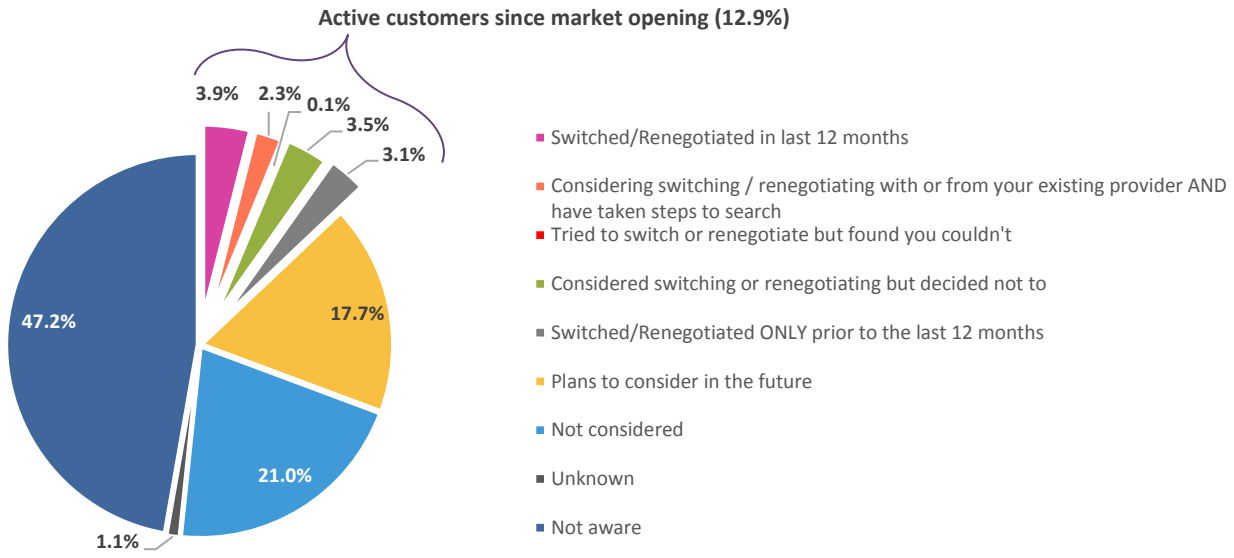


Base: Customers who had seen negative changes (57)

3.14 Regarding customers' negative views of the changes, three fifths (61%) thought that the switchover process had been too complicated, and that extra bureaucracy was an issue (60%). Just under three fifths (58%) reported that poor communication was an issue, whilst around half (51%) said resolving issues now took too long and that the automatic transfer was, itself, a negative change (47%).

Market Engagement

Figure 12: Which of the following scenarios best applies to your organisation?



Base: All Customers (1,000)

3.15 For the purposes of the analysis, those who have switched or renegotiated since April 2017, those who are actively considering switching, those who had tried to switch but could not, and those who considered switching but decided not, have all been grouped into a category of 'active customers'. Meanwhile, those who plan to consider in the future, those who are have not considered and those who are not aware of changes, have been grouped as 'inactive' customers.

3.16 Across all organisations, including those who were not aware that they were able to switch retailers prior to the survey, just over one in ten (12.9%) have actively considered or are currently actively considering switching. We can see that overall 7% have switched or renegotiated (3.9% in the last 12 months and a further 3.1% who had *only* done so prior to 12 months ago) and that 2.3% are actively considering switching or renegotiating. 3.5% have considered switching but decided not to and less than 0.1% tried but failed.

3.17 Around a fifth said that they plan to consider switching or renegotiating in the future (17.7%) or have not considered switching (21%), whilst around half (47.2%) were unaware of the changes to the market.

Figure 13: Active customers since market opening by size of organisation (number of employees).

	All	Micro organisation (0-9 employees)	SME (10 to 249 employees)	Large organisation (250+ employees)
Active customers since market opening	12.9%	11.7%	17.7%	36.1%

Base: All customers (1,000)

Looking at Figure 13, we can see the percentages of 'active customers' broken down by the size of organisations (by the number of employees). Out of the three sizes of organisations, there is a statistically significantly higher amount of 'active customers' in SME and large organisations in relation to the overall average (12.9%).

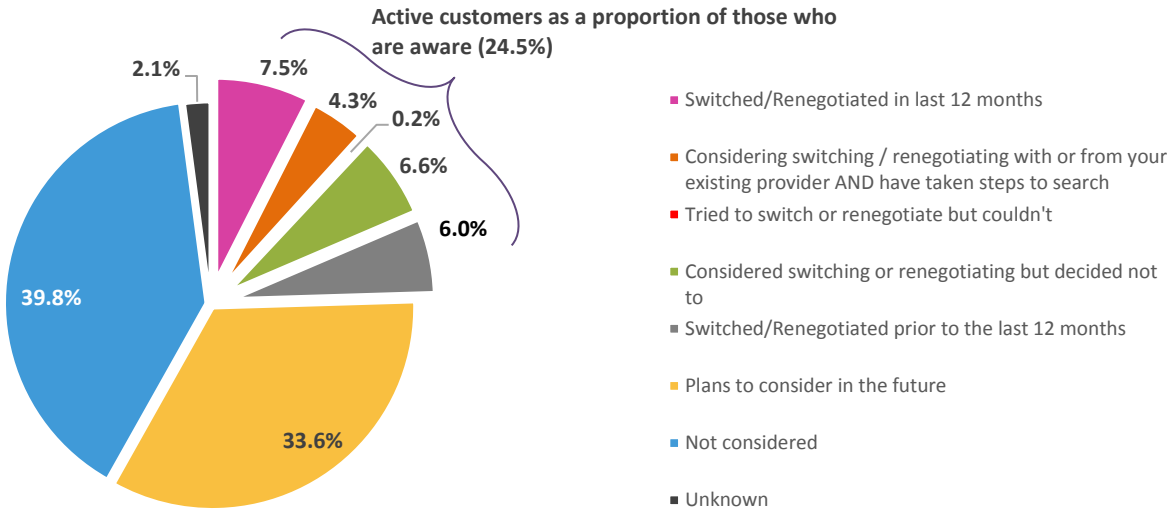
3.18 With regards to the percentage of customers who switched or renegotiated more than once since the market opened, for switchers, 17.9% did so, and of renegotiators, 3.7% renegotiated more than once.

Figure 14: Eligible customers who switched / renegotiated broken down by organisation size.

% eligible customers	Switched in the last 12 months	Renegotiated in the last 12 months	Switched or renegotiated in the last 12 months
Micro businesses (0-9 employees)	2.9%	1.9%	3.6%
SME customers (10-249 employees)	1.7%	5.5%	6.2%
Large customers (250+ employees)	15.2%	4.3%	17.0%
All eligible customers	2.7%	2.4%	3.9%

Base: All customers (1,000)

Figure 15: Which of the following scenarios best applies to your organisation? (Aware of changes)

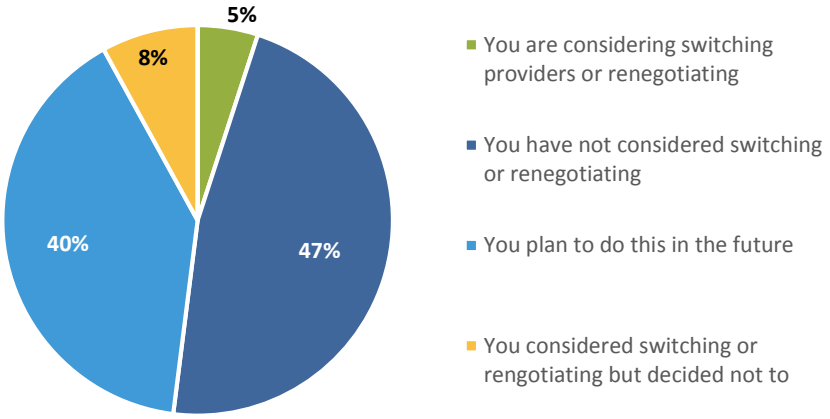


Base: All Customers who are aware of the changes (528)

3.19 When only considering all customers who were *aware* that they were able to switch retailers or renegotiate prior to the survey, just under one quarter (24.5%) were active. More than one eighth (13.37%) had switched, with 7.5% having done so in the last 12 months, and 6% having done so *only* prior to the last 12 months. 4.3% had considered switching or renegotiating and had taken steps to do so, 6.6% had considered switching or renegotiating but decided not to and less than 1% had tried to switch or renegotiate but found that they could not.

3.20 To add to this, one third (33.6%) of customers had plans to consider either switching or renegotiating in the future, and two fifths (39.8%), who were aware of changes, had simply not considered switching or renegotiating.

Figure 16: Which of the following scenarios best applies to your organisation? (Aware non-switchers and non-renegotiators)

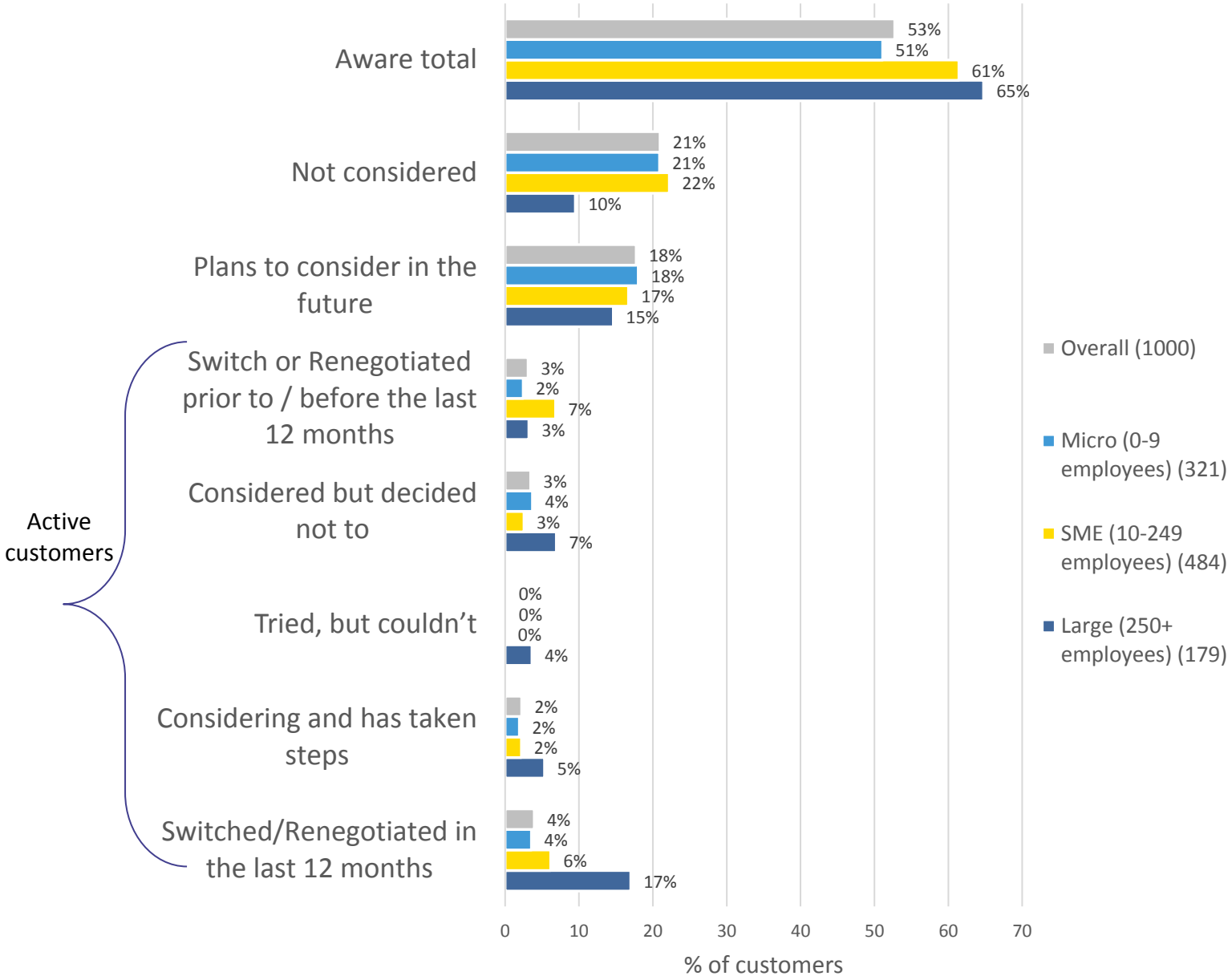


Base: Non-switchers and non-renegotiators who are aware (472)

3.21 Figure 16 presents how non-switchers and non-renegotiators (who *are aware* of the changes) described themselves within the market. Most of these organisations (47%) had not considered switching or renegotiating. Two fifths (40%) said that they had planned to switch sometime in the future, whereas only 8% considered switching or renegotiating but decided not to. Only 5% were considering switching or renegotiating providers.

3.22 Figure 17 below breaks down the size of the organisation (number of employees) by the type of scenario. It further illustrates that larger employers are significantly more likely to be 'active customers', as well as more likely to have switched in the last 12 months. Furthermore, they are significantly less likely to be unaware of changes to the market (35%).

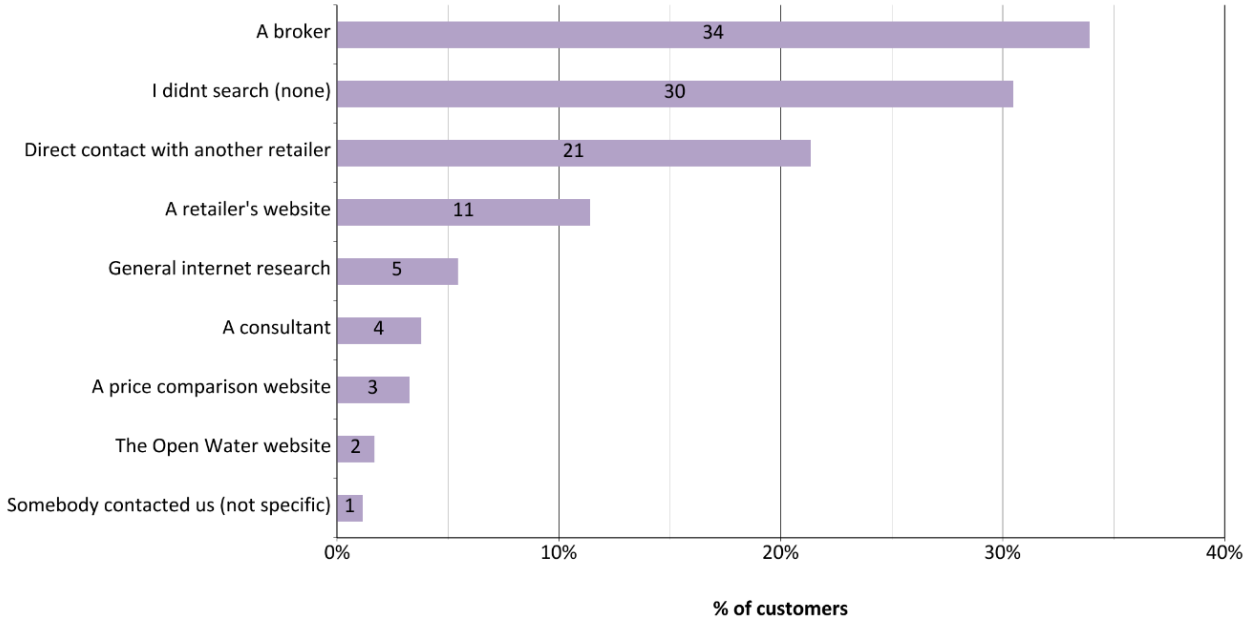
Figure 17: By Size of Organisation, which of the following scenarios best applies to your organisation?



Base: All customers (1,000)

Searching and Comparing

Figure 18: Which of the following, if any, have you used to search for information about alternative retailers?

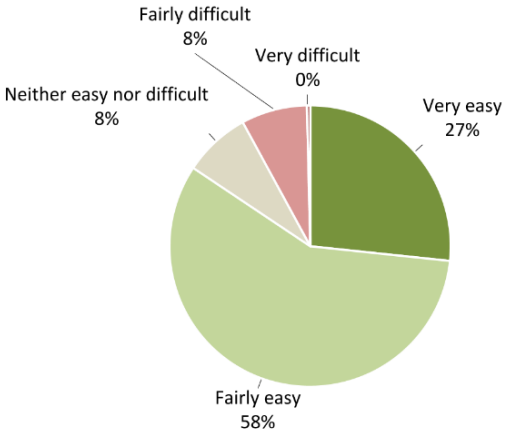


Base: Active customers (175)

3.23 In Figure 18, we can see that, of those customers who have switched, renegotiated or considered switching or renegotiating, around a third (34%) used a broker to find the appropriate information. Just over one fifth of customers (21%) had direct contact with another retailer, and 11% went on a retailer's website. The number of customers who reported using a price comparison website was 3%. Three in 10 have not searched the market.

3.24 Out of those 17 customers who reported that they used a price comparison website when searching for information about alternative retailers, 14 said that they used a price comparison website in which they put in details for a tailored quote (such as water usage). 6 of the 17 customers said that they used a price comparison website which listed quotes from different retailers.

Figure 19: How easy or difficult was it for you to find the information you need?



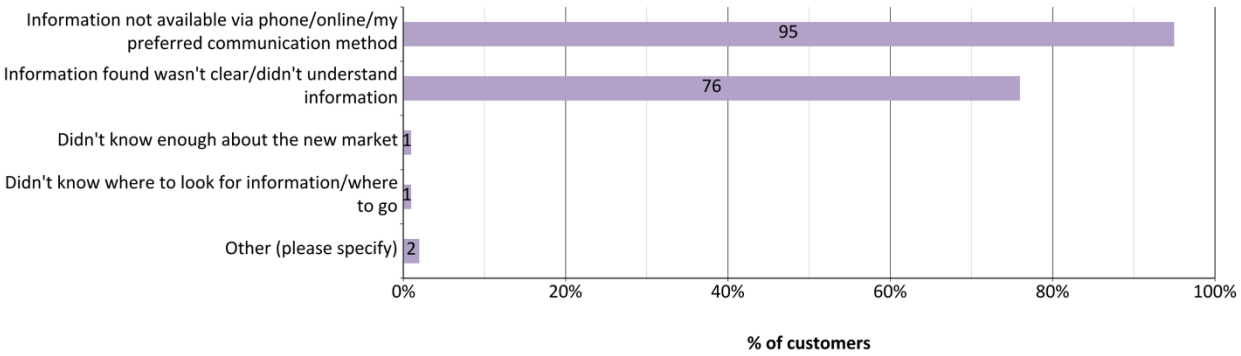
Base: Customers who searched for information on different retailers (143)

3.25 Looking at Figure 19, we can see that out of the customers who were actively searching for information, more than four fifths (85%) of customers thought it was easy to find the information.

3.26 In Figure 20 we can see that for customers who found it difficult to find information, the majority reported that the information was unavailable via their preferred communication method or wasn't clear.

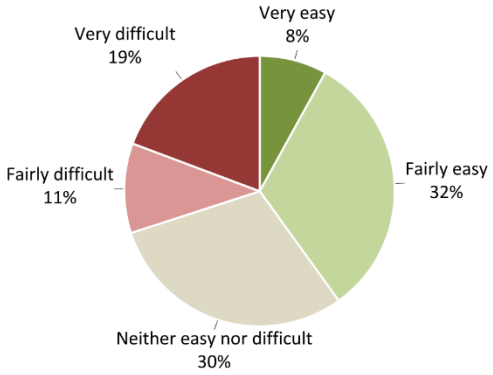
3.27 Please note that due to the small base size, caution must be exercised when looking at the results to this question.

Figure 20: Why was it difficult to find the information you need?



Base: Customers who found it difficult to find the information they needed (17)

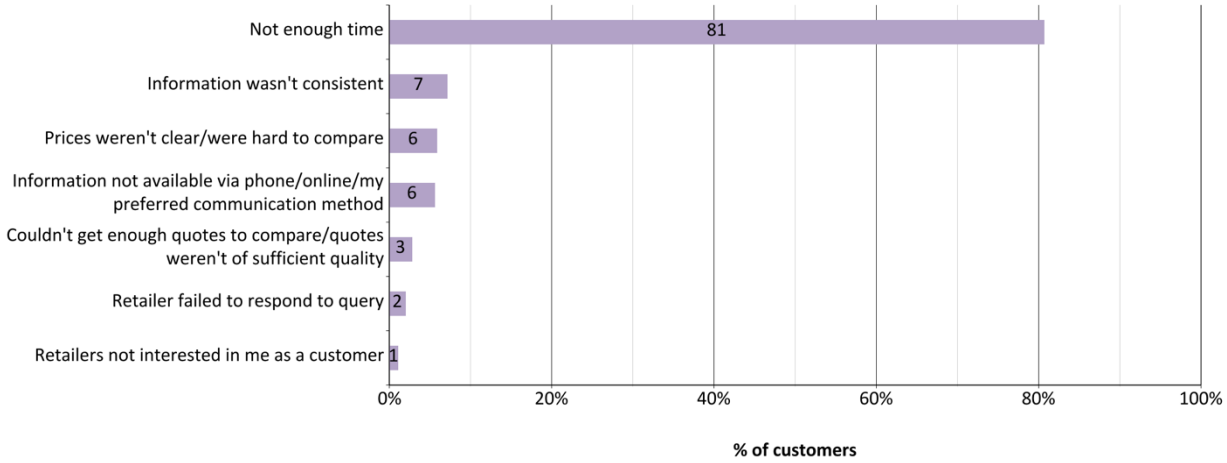
Figure 21: How easy or difficult was it to compare different retailers?



Base: Customers who searched for information on different retailer (130)

3.28 When asked how easy or difficult it was to compare different retailers, two fifths (40%) found it to be easy and 3 in 10 (30%) found it to be difficult. A further 30% also said it was neither easy nor difficult.

Figure 22: Why was this difficult to compare different retailers?

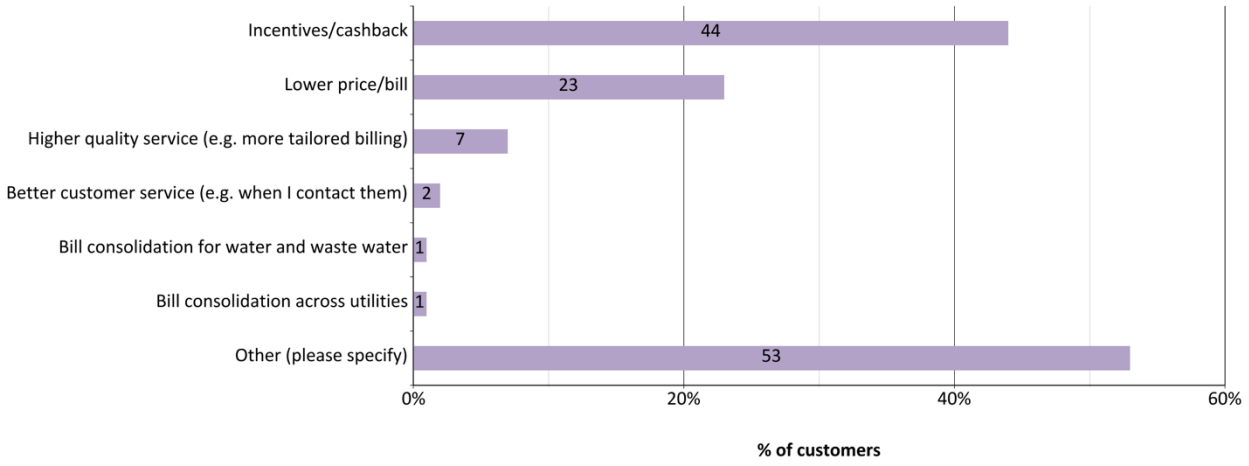


Base: Customers who found it difficult to compare retailers (23)

3.29 Looking at the customers who found it difficult to compare retailers, the majority said they did not have enough time. Smaller proportions also reported that the information available wasn't consistent or that the prices were not clear or hard to compare.[3]

[3] Please note that due to the small base size, caution must be exercised when looking at the results to this question.

Figure 23: Why did you start looking into switching or renegotiating?



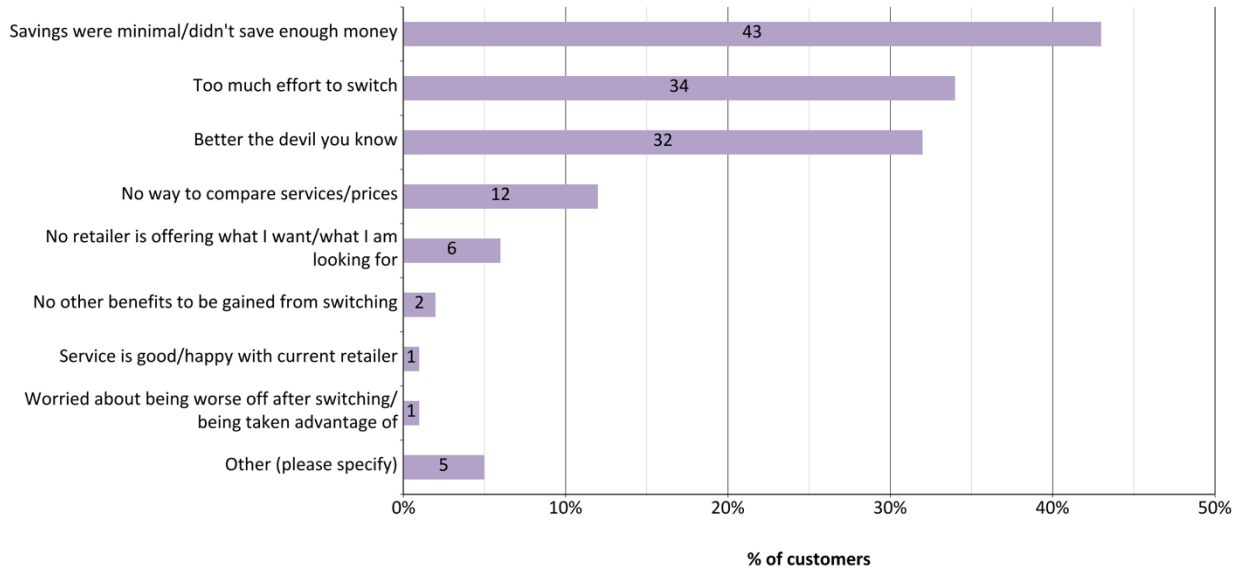
Base: Customers actively looking into switching or renegotiating (80)

3.30 Of the customers who have actively looked into switching or renegotiating, the most common reasons for doing so were due to incentives such as cashback offers (44%) and getting a lower bill (23%). Over half (53%) gave other reasons, with the most common being that switching or renegotiating was simply now a possibility because a broker had prompted them through phoning them.

3.31 Looking at Figure 24, we can see that those who had actively considered switching but had decided not to (which accounts for 4% of organisations) were asked why they decided not to switch retailers after initially considering it. The majority found that the savings were minimal (43%), whilst around a third thought that it was too much effort to switch (34%), and took the view: 'better the devil you know' (32%).

3.32 Around one eighth (12%) of customers suggested that there was no way to compare services/prices, and 6% found that there was not a retailer in the market that was offering what they wanted. Just 2% of organisations thought there were no benefits to be gained from switching, and an even smaller proportion thought the service was good enough to stay (1%) or that they were worried about being worse off after the switch (1%).

Figure 24: Why did you decide not to switch retailers after considering it?



Base: Customers who looked into switching but decided not to (54)

Non-switching Customers

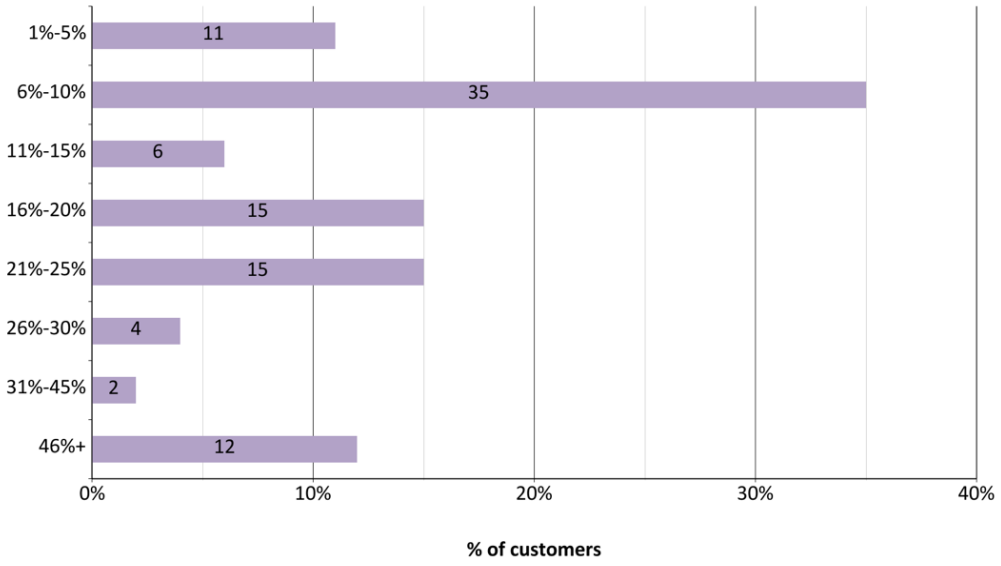
3.33 Continuing at look those who had not considered switching yet, those customers were asked why they had not considered switching. The most frequently given reasons were that they intend to in the future but have not got around to it yet (30%), they are happy with their current retailer (22%), and that it's too much effort to switch/or no point (18%). Just over one eighth (14%) saw no point in switching. Therefore, it seems that perceptions of the time and / effort involved in switching and not seeing any advantages in doing so, are the main barriers to exploring a switch, rather than actually experiencing difficulties when searching for information.

3.34 When customers were asked about what sort of percentage of water bill reductions would encourage them to switch, just under 6% said that they 'would not switch retailer due to water bill reduction alone', and that 8% 'would not switch at all.' It is also worth noting that 193 customers (19%) said they did not how much of a reduction would encourage them to switch. However, Figure 25 below only shows the percentages that explicitly said a reduction would encourage them to switch.

3.35 As we can see just over one in ten (11%) of customers said a reduction of 1%-5% would encourage them to switch their retailer, whilst around a third (35%) of customers said between 6%-10% would be sufficient. Over half of customers (54%) said that a reduction of more than 10% in their bills would encourage them to switch.

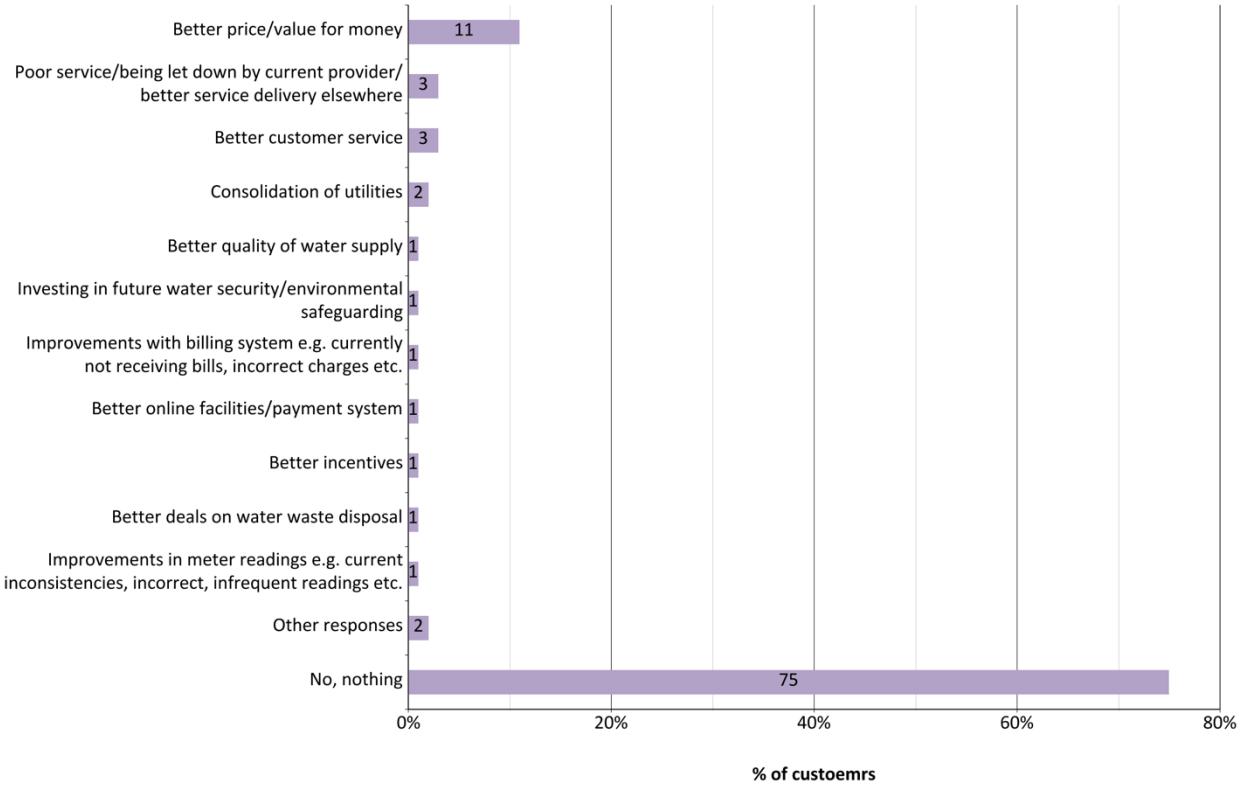
3.36 Larger organisations in comparison to SMEs, were more likely to only need a reduction of between 1%-5%. This was, perhaps, due to their consumption be so large that even a small annual reduction would go a long way.

Figure 25: In percentage terms, what level of annual water bill reduction would encourage you to switch retailer?



Base: Customers who would consider switching for a reduction but had not switched or renegotiated (765)

Figure 26: Is there anything else which would encourage you to switch retailer or renegotiate with your existing retailer? If so, what?

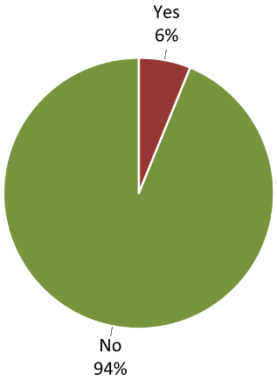


Base: Customers who were either not-aware or had not considered/currently considering switching or renegotiating (634)

3.37 Looking at other responses to encourage customers to switch retailers, three quarters (75%) said that nothing would encourage them to do so. Just over one in ten (11%) said that they would need a better price and small number of customers said it would have to be due to experiencing poor service (3%), wanting to have better customer service (3%) or to consolidate all their utilities (2%).

Problems and Complaints

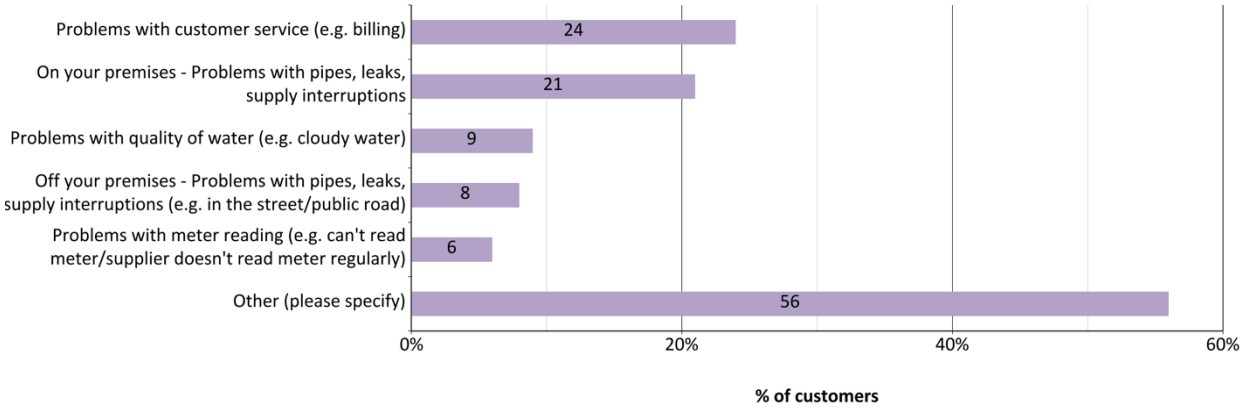
Figure 27: Have you had any problems with clean or waste water services over the last 12 months?



Base: All customers (999)

3.38 Looking at Figure 27, we can see that the vast majority of customers (94%) had not experienced a problem with their water services in the last 12 months. Out of the customers who had experienced a problem, virtually all of them (99%) went ahead and reported the problem to their provider.

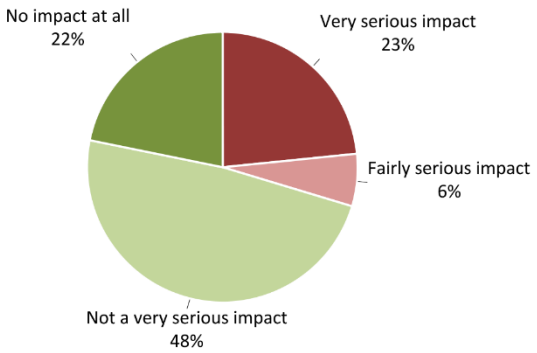
Figure 28: What were the problems? (Multiple answers given)



Base: Customers who had experienced problems with their clean and waste water in the last 12 months (91)

3.39 In Figure 28 we can see that out of the those who experienced a problem, 24% of customers experienced issues with customer service (for example, billing) and 21% attributed the problems to problems with leaks and supply interruptions.

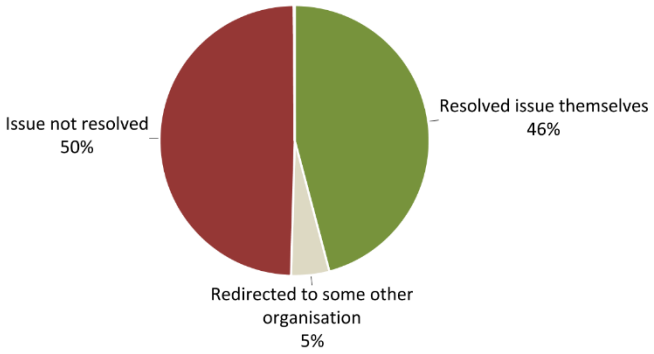
Figure 29: How serious an impact did these problems have on your business?



Base: Customers who had experienced problems with their clean and waste water in the last 12 months (91)

3.40 Despite the problems, 7 in 10 customers (70%) said that the problems they had experienced, had not had a very serious impact or no impact at all on their business. However, just over a quarter (29%) thought the problem had had a serious impact on their business.

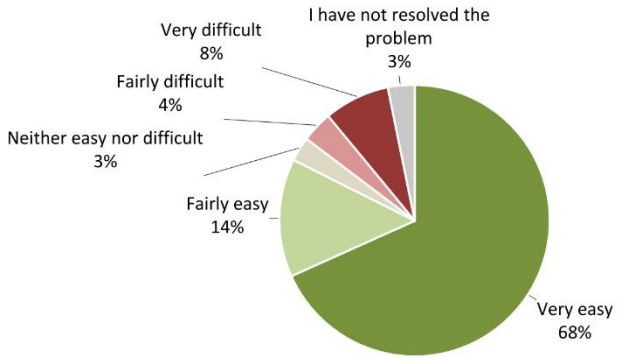
Figure 30: Were they able to resolve the problem, or did they redirect you to some other organisation?



Base: Customers who reported a problem with their clean and waste water to their provider (83)

3.41 Out of the customers who had experienced problems and reported them, half (50%) said that the problem had still not been resolved, whereas just under half (46%) reported that the provider was able to resolve the problem themselves.

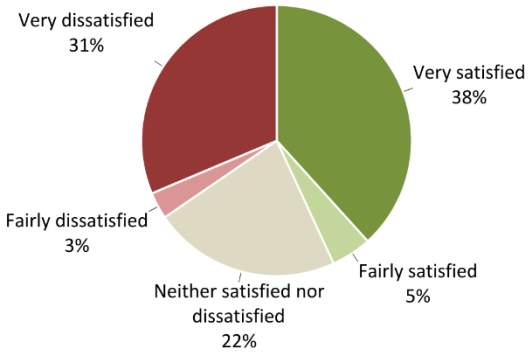
Figure 31: How easy or difficult was it to resolve the problem?



Base: Customers who had problems in the last 12 months and either resolved the issue or were re-directed to another organisation (47)

3.42 Of the customers who said that their problem was resolved, a substantial majority (82%) found it to be easy, with more than two thirds (68%) stating it was very easy. Around one eighth (12%) said that it was difficult and only 3% found it to be neither easy nor difficult. Out of the customers who found it difficult to resolve the problem, thirteen out of fourteen customers attributed the difficulties to poor customer service (i.e. dealing with issues, communication).

Figure 32: Thinking only about the contact you had with your provider, how satisfied or dissatisfied were you with the contact overall?



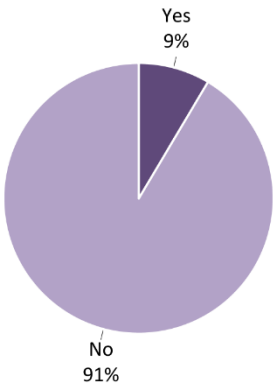
Base: Customers who reported a problem with their clean and waste water to their provider (82)

3.43 Customers had who had reported a problem to their provider were asked how satisfied they were with the contact overall. Figure 32 shows that 43% of customers said that they were satisfied with the contact from the retailer; and out of those who were satisfied, the majority said were very satisfied (38%). Over one fifth (22%) of customers said that they were neither satisfied nor dissatisfied with the type of contact they had experience. However, over one third (35%) of customers said they were dissatisfied with the contact that had had, with almost a third (31%) feeling very dissatisfied.

Overall customer views of the water market

Overall views on retailer customer service

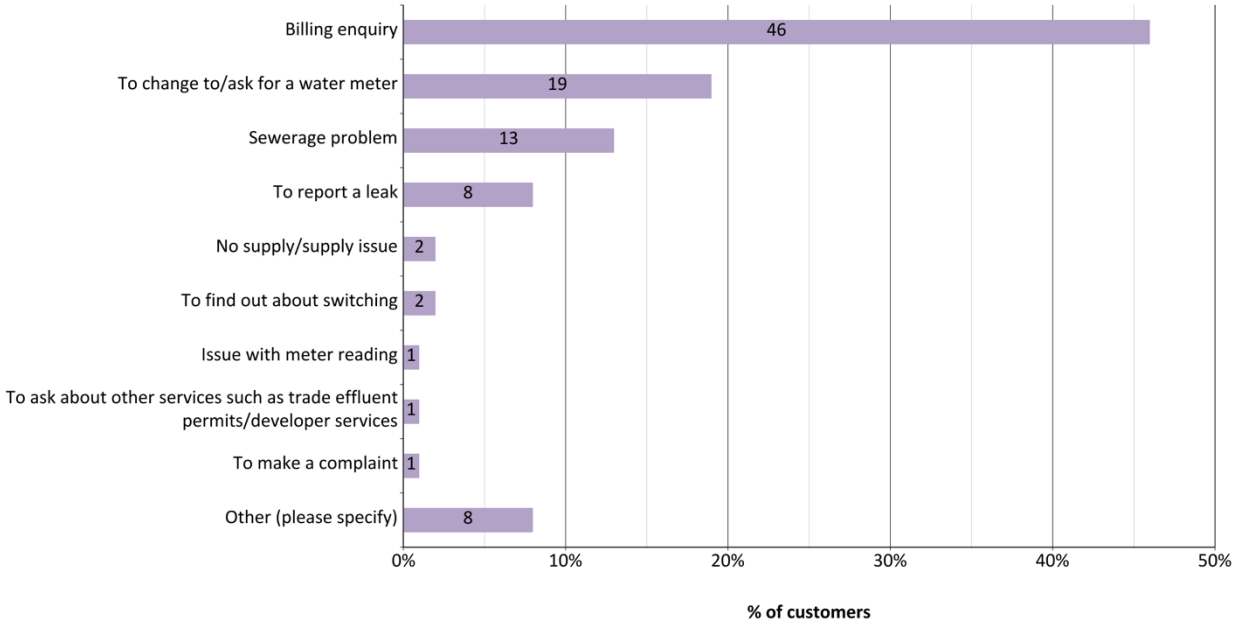
Figure 33: Have you contacted your provider or any other organisation with any enquiry about your water or waste water services over the last 12 months?



Base: All Customers (992)

3.44 Only 9% of customers reported contacting their provider or another organisation with an enquiry about their water or waste water services in the last 12 months, other than regarding a problem. The vast majority (91%) said they had not made contact.

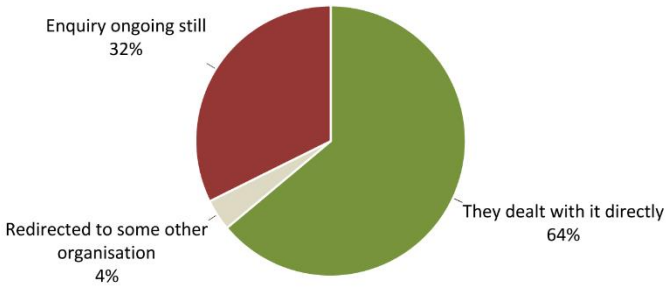
Figure 34: What was your most recent contact about? (Multiple answers given)



Base: Customers who contacted their provider in the last 12 months (161)

3.45 Of the customers who contacted their provider in the last 12 months, just under half (46%) said their most recent contact was about a billing enquiry. Under a fifth reported their most recent contact was in relation to changing their water meter (19%) or a sewerage problem (13%), whilst under 1 in 10 (8%) got in touch to report a leak.

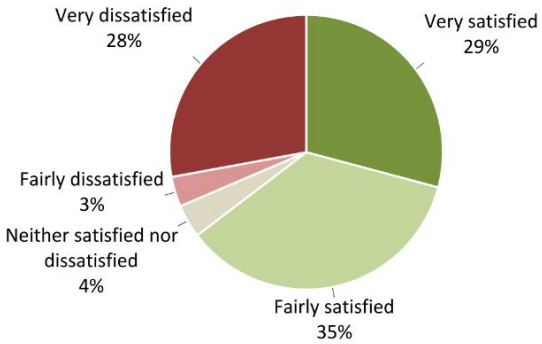
Figure 35: Were they able to deal with your enquiry, or did they redirect you to some other organisation?



Base: Customers who had made an enquiry about their clean and/or waste water in the last 12 months (160)

3.46 Of the customers who made an enquiry, just under two thirds (64%) said that it was dealt with directly by their retailer. Just under a third (32%) said that the enquiry was still ongoing, and only 4% said that they had been directed to some another organisation.

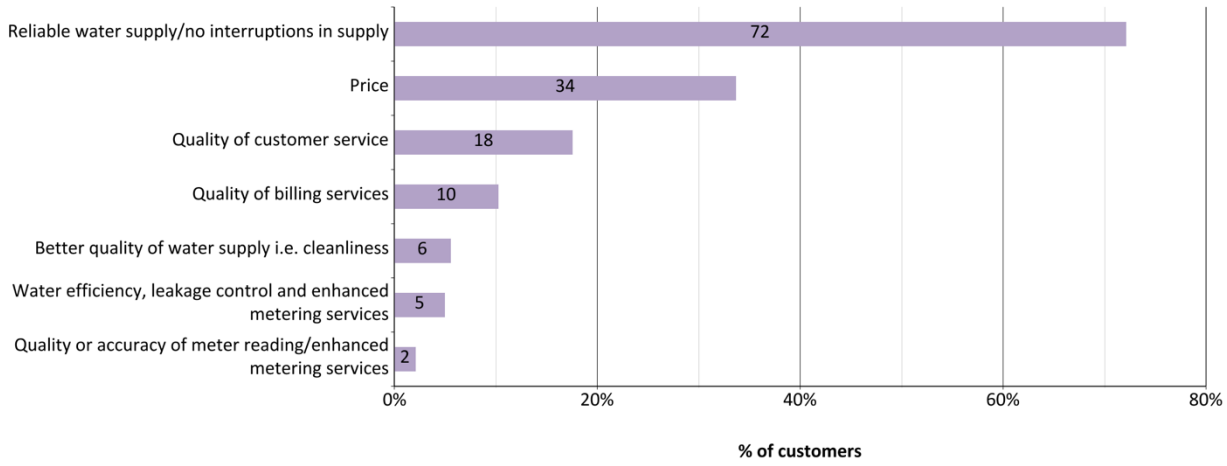
Figure 36: Thinking only about your most recent contact, how satisfied or dissatisfied were you with the contact overall?



Base: Customers who had made an enquiry about their clean and/or waste water in the last 12 months (161)

3.47 Looking at the levels of satisfaction regarding the contact the customer had experienced, we can see that, in Figure 36, around two thirds of customers (65%) were satisfied. Over 3 in 10 (31%) customers were dissatisfied however, with only 4% feeling neither satisfied nor dissatisfied.

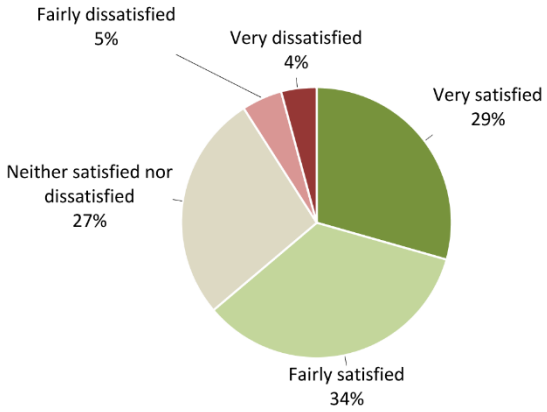
Figure 37: Overall, and taking everything into account, what is most important to you as a water customer? (Multiple answers given)



Base: All customers (966)

3.48 Looking at Figure 37, we can see that over 7 in 10 (72%) customers thought that having a reliable water supply (without interruptions) was the most important thing to them as a water customer. Just over a third (34%) said that the price mattered the most to them, whilst just under a fifth (18%) rated the quality of customer service as most important.

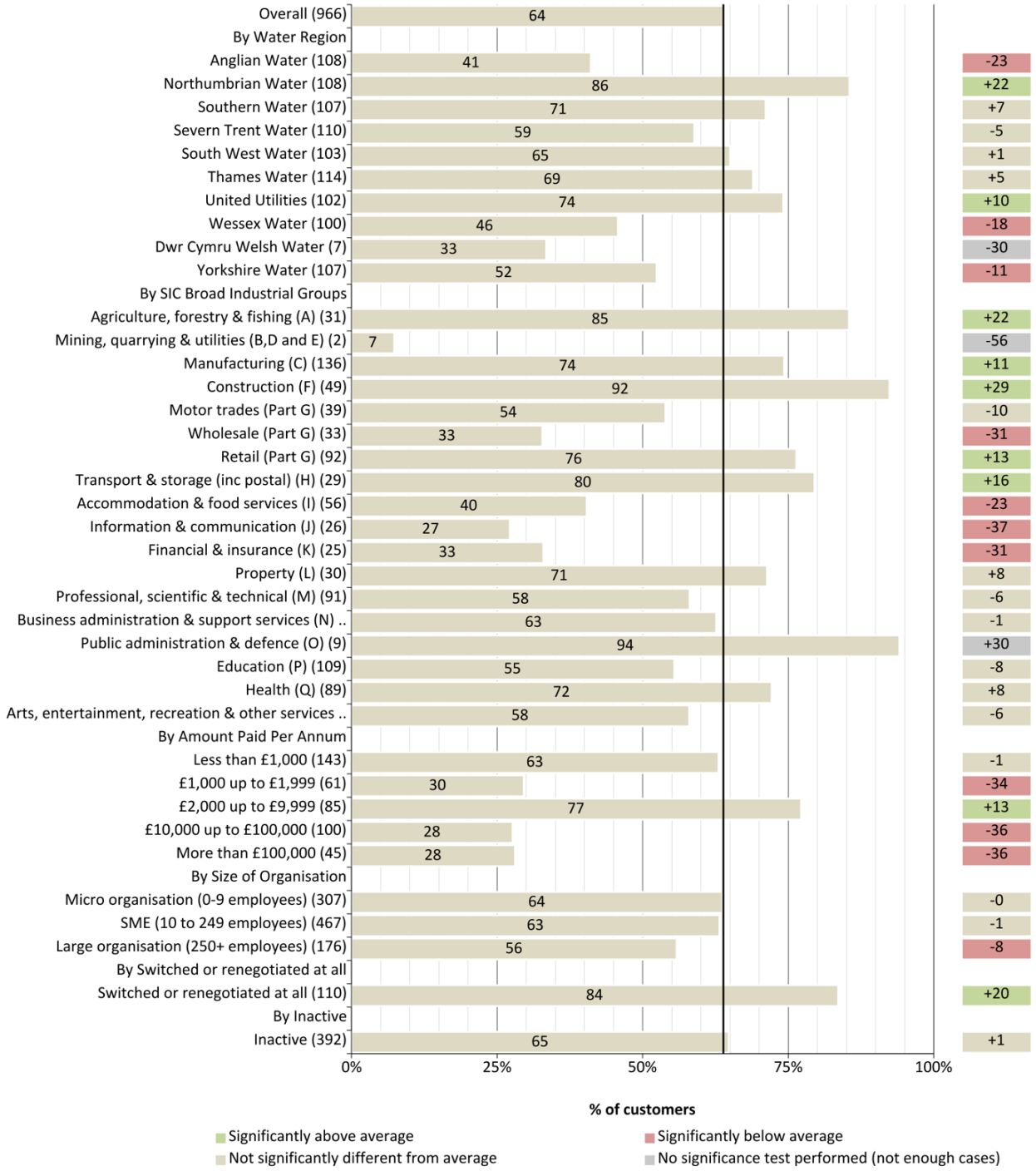
Figure 38: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?



Base: All customers (966)

3.49 Looking at how satisfied and dissatisfied customers are with the market as whole, we can see that around two thirds (64%) were satisfied. Just under a tenth (9%) were dissatisfied, whilst over a quarter (27%) said that they felt neither satisfied nor dissatisfied

Figure 39: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole? (Grouped Responses)



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

3.50 Looking at Figure 39 on the previous page, we can see that switchers and renegotiators were, perhaps, unsurprisingly, significantly more likely to be satisfied with the market. Organisations who were in the regions covered by Northumbrian Water and United Utilities were significantly more likely to be satisfied with the market as a whole. Furthermore, organisations in the industries of agriculture, forestry and fishing, manufacturing, construction, retail, and transport/storage, were also significantly more likely to be satisfied with the market as a whole.

3.51 Conversely, organisations in the water region Anglian Water, Wessex Water and Yorkshire Water were significantly less likely to be satisfied with the market. Organisations in the industries: wholesale, accommodation and food services, information and communication, along with finance and insurance, were also significantly less likely to be satisfied with the market. Finally, larger organisations were also significantly less likely to be satisfied with the market as a whole.

4. Survey of Switchers and Renegotiators

Results from Quantitative Telephone Survey

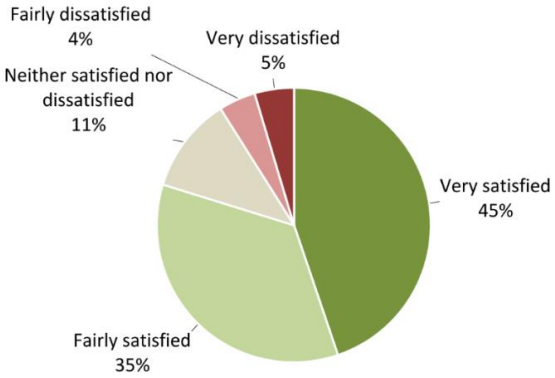
4.1 Having confirmed whether they had switched retailers or negotiated a new deal, customers were asked to respond to questions about:

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

4.2 The responses to the questions that are set out below include those customers from the previous chapter who had switched or renegotiated.

Overall Satisfaction

Figure 40: Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?

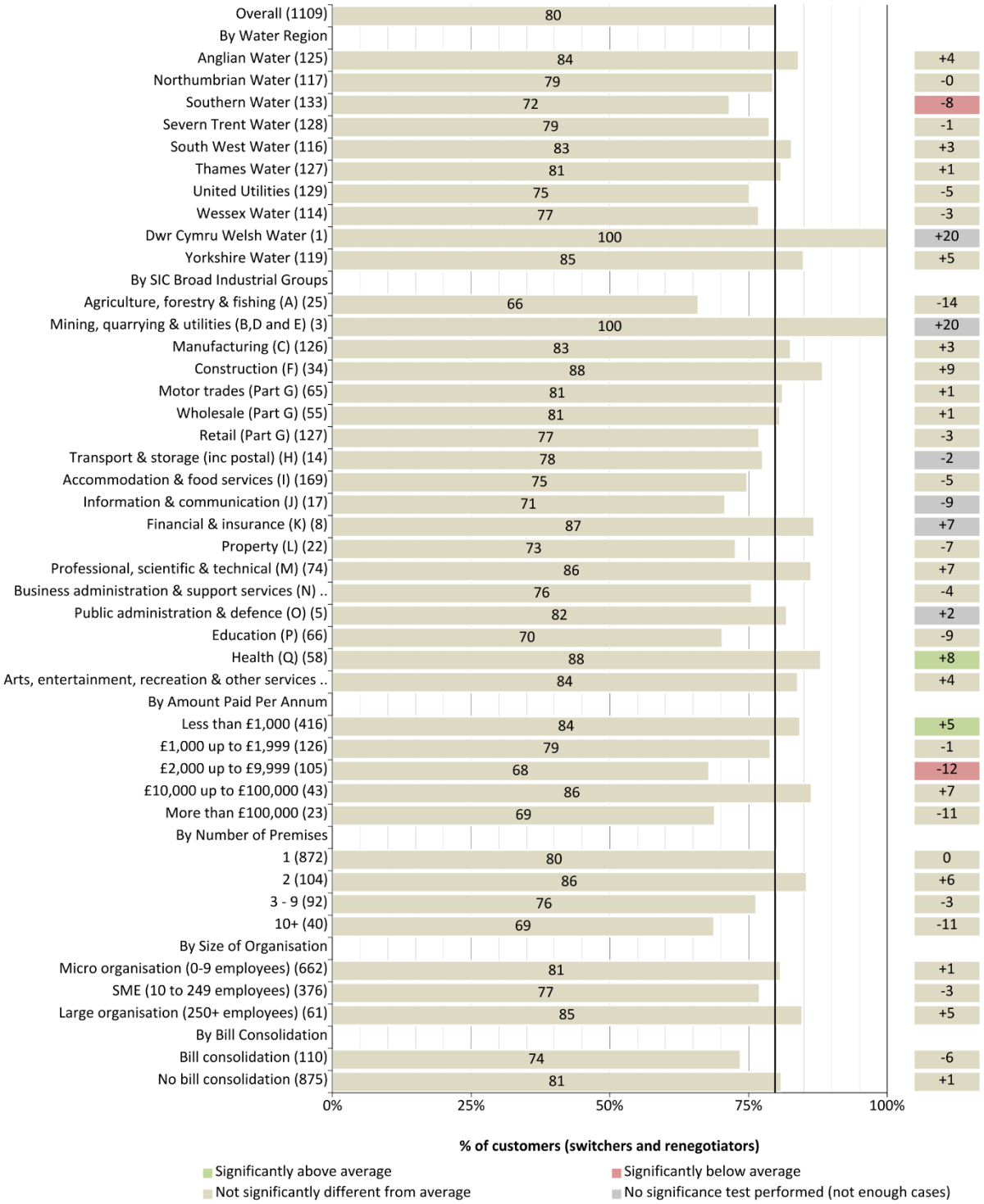


Base: All switchers and renegotiators (1,109)

4.3 Customers who had ever switched were asked overall how satisfied or dissatisfied they are with their current clean water and waste water retailer(s). Four fifths (80%) were satisfied with their current supplier(s), with only 9% saying they were dissatisfied. The percentage of customers who reported being satisfied with their current retailer has decreased by 2 percentage points compared to the survey of switchers carried out in 2017-18 (82%), however, this is not a statistically significant reduction.

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

Figure 41: Customers who reported being satisfied with their current clean and waste water retailer(s), by subgroup



Base: All switchers and renegotiators (number of respondents shown in brackets)

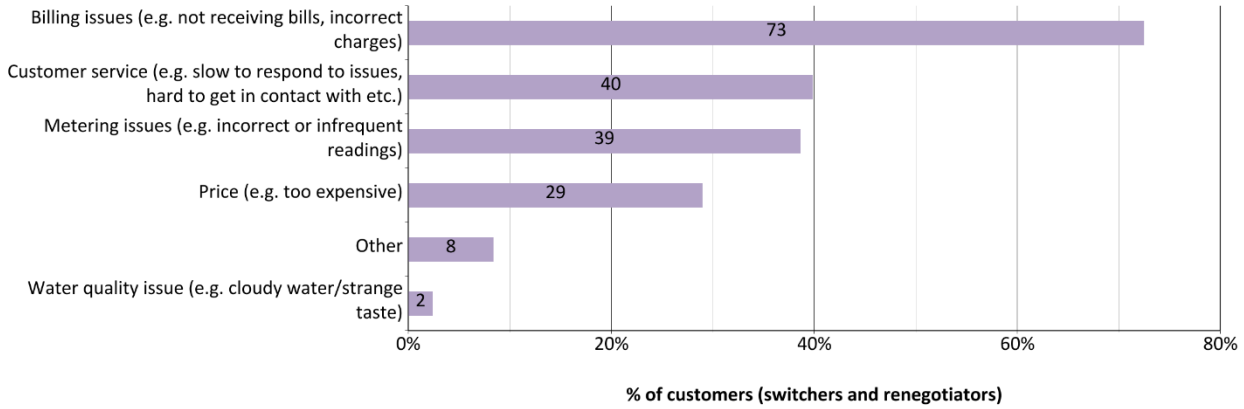
4.5 Customers spending £2000-£9,999 on clean water and waste water services per annum reported significantly lower satisfaction with their retailer than overall. Among the relatively small number of customers (23 overall) spending more than £100,000 per annum, satisfaction was also reported as being

lower than average. Customers in the education sector were also less likely to express satisfaction with their retailers when compared to other SIC groups.

4.6 Conversely, users spending less than £1000 on clean water and waste water services per annum reported significantly higher satisfaction with their retailer compared to overall. Customers in the health sector were also more likely to express satisfaction with their retailers when compared to other SIC groups.

4.7 While in the Southern Water region there was a significantly lower number of customers expressing satisfaction with their current retailers when compared to the average, it should be noted that there was not a corresponding increase in customers reporting dissatisfaction, rather an increase in those who reported being neither satisfied nor dissatisfied.

Figure 42: Why were you dissatisfied?



Base: All switchers and renegotiators who were dissatisfied (94)

4.8 Customers who had switched or renegotiated at some point since April 2017 and reported that they were dissatisfied with their current retailer were asked why this was.

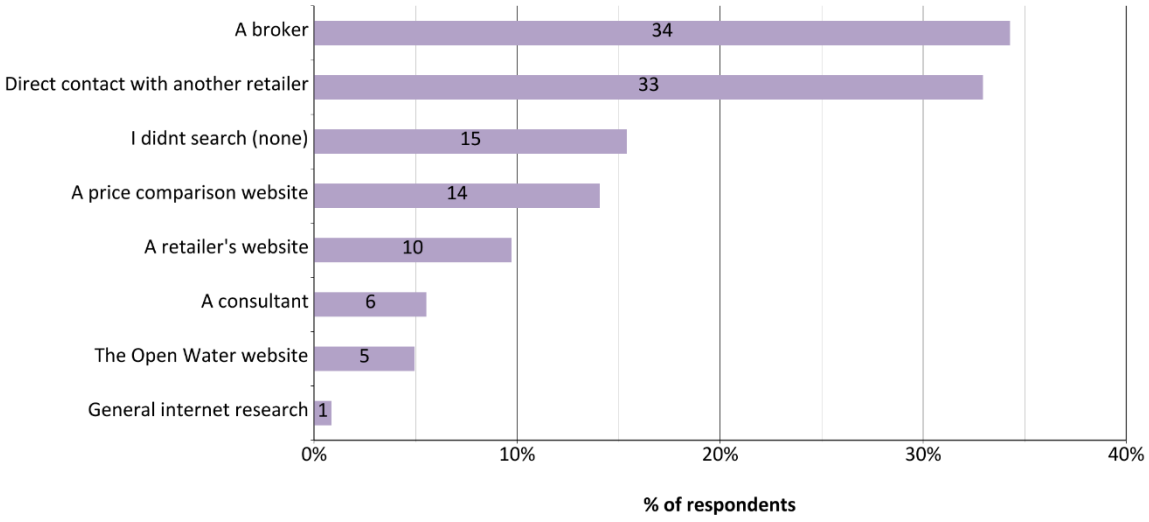
4.9 The most frequent reason (73% of customers) for dissatisfaction was billing issues, e.g., not receiving bills or being charged incorrectly. This was followed by customer service problems, such as the retailer being slow to respond to issues or being hard to get in contact with etc. (40%), and metering issues, such as incorrect or infrequent readings (39%). Price was a reason for dissatisfaction among nearly a third of customers (29%). Water quality issues were also mentioned by a small percentage of customers (2%).

4.10 Regarding the 'other' reasons for dissatisfaction, these varied but included issues such as the 'hassle' of the process, customers being contacted too frequently about switching their other utilities to the same retailers, and difficulties in consolidating multiple premises to a single retailer (e.g. closing old accounts, final meter readings).

Searching and comparing

Searching for information

Figure 43: Which of the following, if any, have you used to search for information about alternative retailers?



Base: All switchers and renegotiators (1,052)

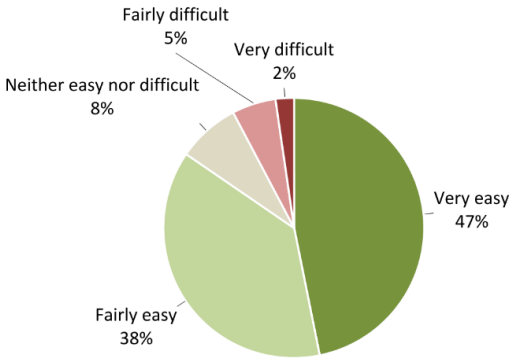
4.11 Just over one third of customers (34%) said that they had used a broker to search for and compared alternative retailers, with a further 5% saying that they had used a consultant to do the same.

4.12 One third (33%) of customers reported having had direct contact with another retailer to find out information, and a further 9% said that they had gone to a retailer's website when searching for information.

4.13 14% said they had used a price comparison website, while one-in-twenty (5%) used the Open Water website.

4.14 Customers who were dissatisfied with their current retailer were significantly less likely to have used a broker or price comparison website, and significantly more likely to have had direct contact with another retailer or a consultant when searching for and comparing alternative retailers.

Figure 44: How easy or difficult was it for you to find the information you needed?



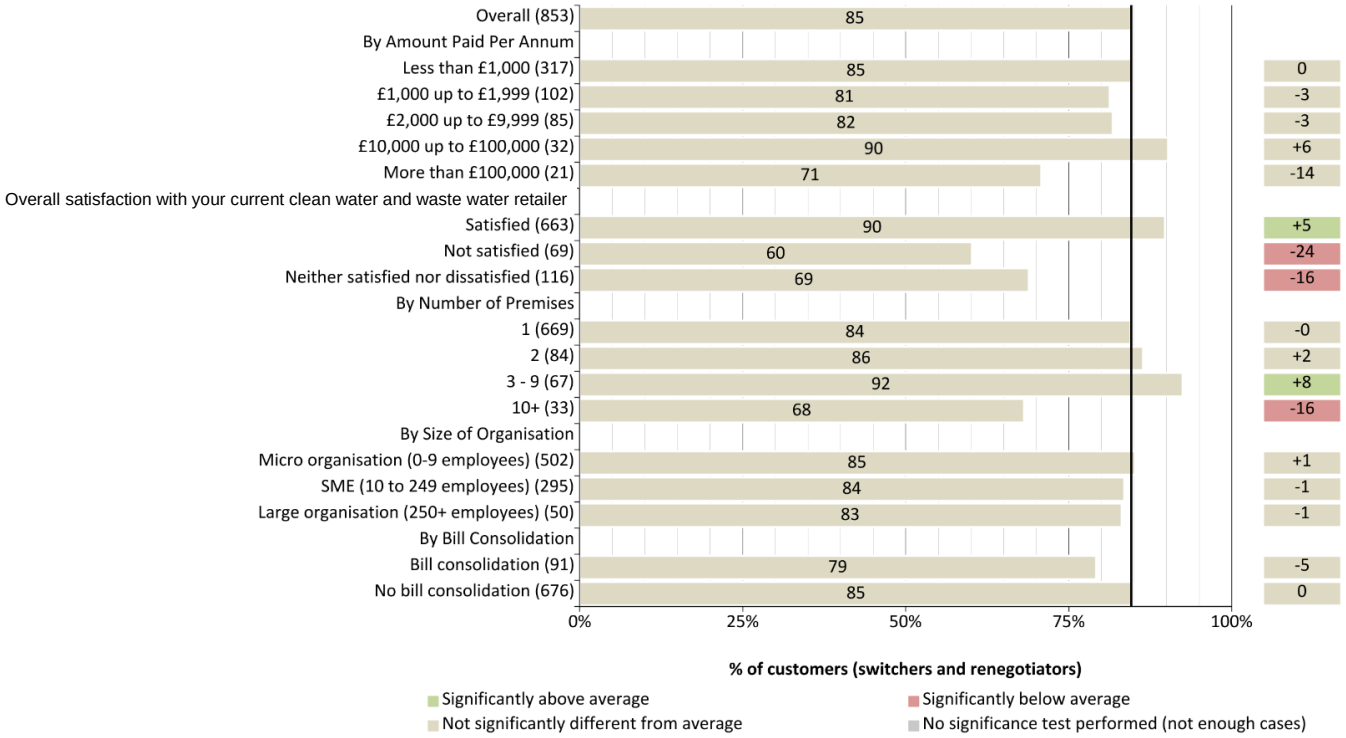
Base: All switchers and renegotiators [853]

4.15 More than four fifths of customers (85%) said it was easy to find the information they needed, while fewer than 1 in 10 (7%) found it difficult.

4.16 Customers who said they found information easily were significantly more likely to have reported using a price comparison website or a broker than customers overall, while those who reported some difficulty in finding information were significantly more likely to have used a retailer's website or the Open Water website. They were also more likely to have had direct contact with the retailer than the average customer.

4.17 The proportion of customers reporting that they found it easy to find the information they needed (which included using a broker) had increased significantly from 2017-18 (82%) to 85% this year, while customers reporting difficulty in finding information had reduced significantly from 11% in 2017-18 to 7% in 2018-19.

Figure 45: Customers who found it easy to find the information they needed (by subgroup)

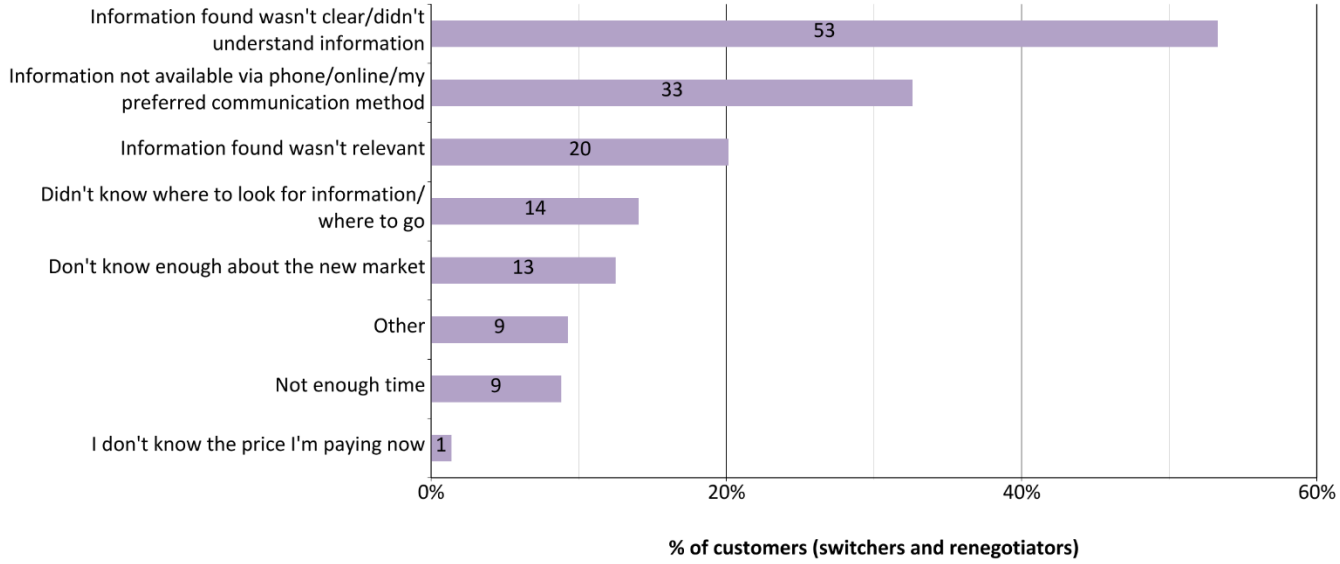


Base: All Switchers and renegotiators (number of respondents shown in brackets)

4.18 Customers who said that they were satisfied with their current retailer overall were significantly more likely to have reported that they found it easy to have found the information they needed than the average overall.

4.19 Those who had had their bills reduced due to lower tariffs were significantly more likely to say they had found finding the information they needed to be easy. Meanwhile those who said they had not received reduced bills, or had received no benefits at all, were more likely to have experienced some difficulty in finding the information they needed.

Figure 46: Why was this difficult?



Base: Switchers and renegotiators who said it was difficult to find the information they needed (57)

4.20 Problems with both the availability and quality of information were common themes from customers when asked why it was difficult to find the information.

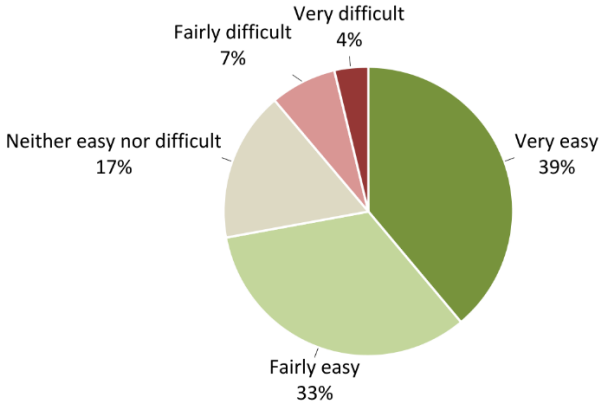
4.21 Of the customers who said it was difficult to find the information they need, the majority reported that the information they found was not clear or that they found it difficult to understand. One third stated that they were not able to access information online, by phone or via any other preferred method, while a fifth said that the information they found was not relevant.

4.22 A small number of customers gave other reasons they found searching for information difficult. These included, among others, difficulties in receiving quotes in the first place, having to search for retailers individually, wanting more retailers to choose from and being asked for information that the customer was not able to access (e.g. separate codes for clean water and waste water).

Comparing retailers

4.23 Customers who had chosen to switch retailers or negotiate new deals were asked questions about their experiences.

Figure 47: How easy or difficult was it to compare different retailers?



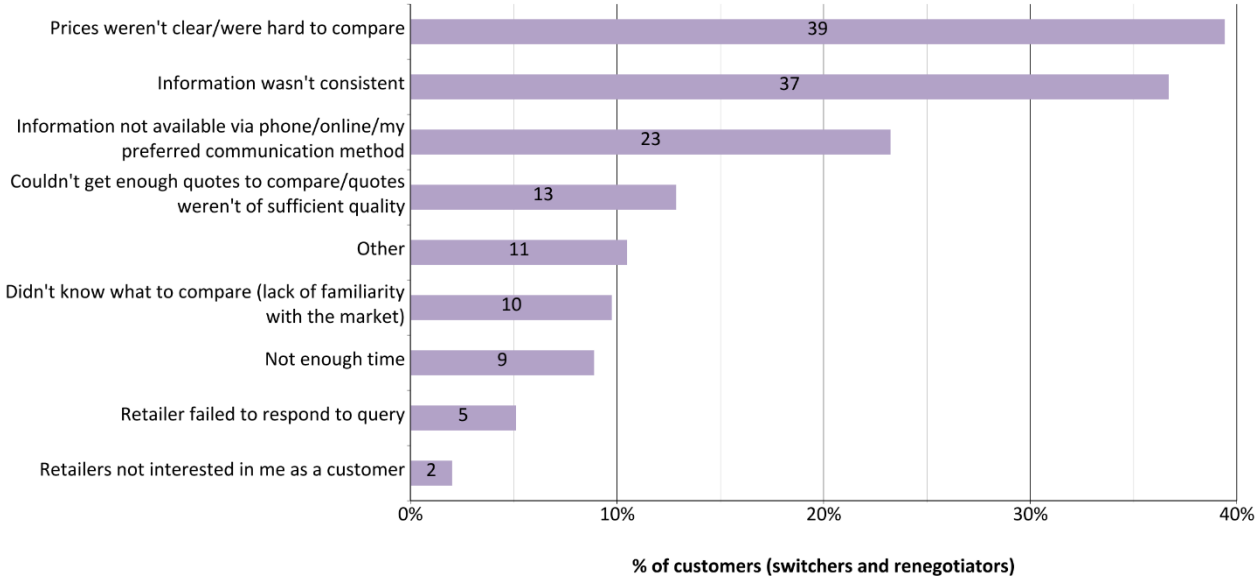
Base: All switchers and renegotiators who explored the market (739)

4.24 Nearly three quarters (72%) of switchers and renegotiators who explored the market before staying with their existing supplier said it was easy to compare retailers, while just over 1 in 10 (11%) said they found this difficult, a slightly larger proportion to those that found it difficult to find information generally.

4.25 Customers from the Southern Water region were significantly more likely to say they found accessing information about different retailers, more difficult than customers overall. Conversely, those who were in the Northumbria Water region were significantly more likely to say they found this easy, and customers in the South West Water regions also reported finding comparing retailers easier than average.

4.26 Organisations with ten or more premises were significantly more likely to say that they found it difficult to access information about different retailers than customers with fewer than ten premises.

Figure 48: Why was this difficult?



Base: Switchers and renegotiators who found comparing retailers difficult (86)

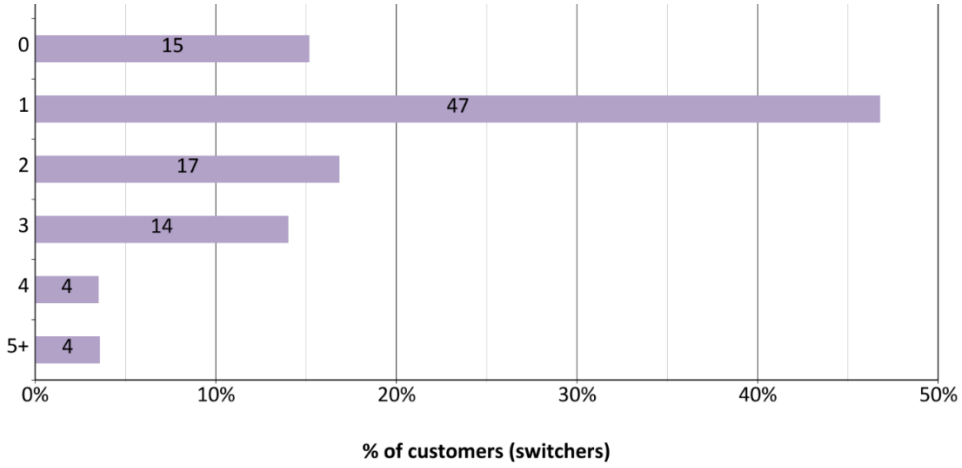
4.27 Just under two fifths (39%) of those switchers and renegotiators who found comparing different retailers difficult said they did so because the prices were either not clear or were difficult to compare. Similarly, just under two fifths (37%) complained of issues with the consistency of the information they were given.

4.28 Nearly a quarter of switchers and renegotiators (23%) who reported difficulties in comparing retailers said that that they were not able to access information on their phones, online or by any other preferred method. More than 1 in 8 (13%) reported that they either could not get enough quotes to properly compare retailers, or that the quotes were not of sufficient quality. 1 in 10 (10%) said they did not know what to compare, or that they lacked familiarity with the market. A small number of customers reported that retailers failed to respond to their queries.

4.29 Of the customers who gave additional reasons for finding the comparison of retailers difficult (11%), the reasons varied, but included experiences such as having to supply too much information to a prospective retailer to receive a quote, limited competition in the water market, the lack of a price comparison website and the need to compare a large number of retailers individually.

Receiving quotes from retailers before acting

Figure 49: How many, if any, different retailers did you receive quotations from prior to switching?

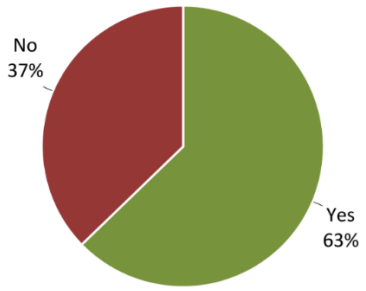


Base: All Switchers (725)

4.30 Switchers and renegotiators took different approaches to exploring the market before acting. Almost half (47%) of customers who switched retailers received a quotation from just one retailer prior to switching. Around two fifths (39%) received quotes from two or more retailers, with fewer than 1 in 10 (8%) getting quotations from more than three retailers.

4.31 Close to 1 in 6 (15%) customers who switched also reported that they had received no quotes from retailers prior to switching.

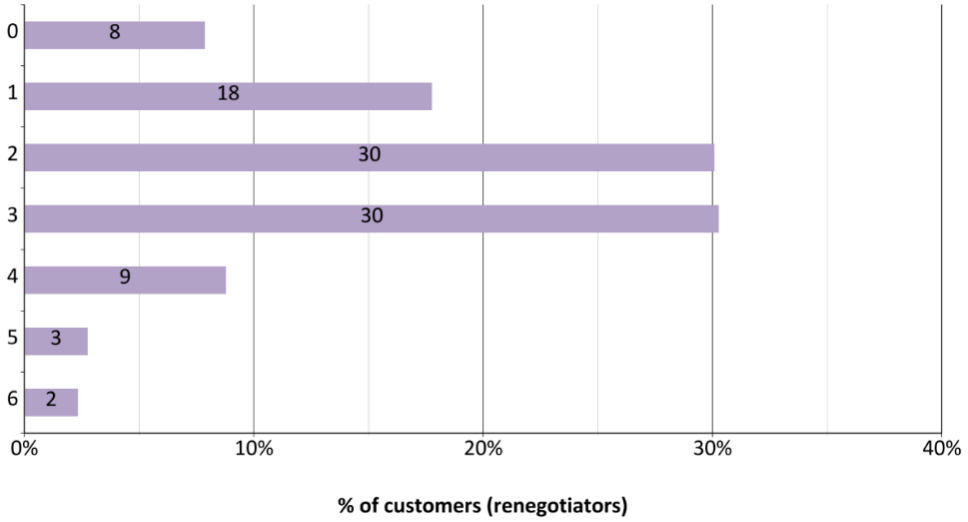
Figure 50: Before you renegotiated, did you explore what else was on offer?



Base: All renegotiators (93)

4.32 Nearly two thirds (63%) of customers who renegotiated with their existing supplier explored what else was on offer first.

Figure 51: How many, if any, different retailers did you receive quotations from prior to renegotiating with your retailer?



Base: Renegotiators who explored what was on offer before renegotiating (52)

4.33 There was a considerable difference between switchers and renegotiators in terms of how many retailers they contacted prior to making their decision. In Figure 51, we can see that around three quarters of renegotiators who answered the question contacted two or more retailers, compared to less than two fifths of switchers.[4]

[4] It is worth noting that, due to the low base, these results should be interpreted with care.

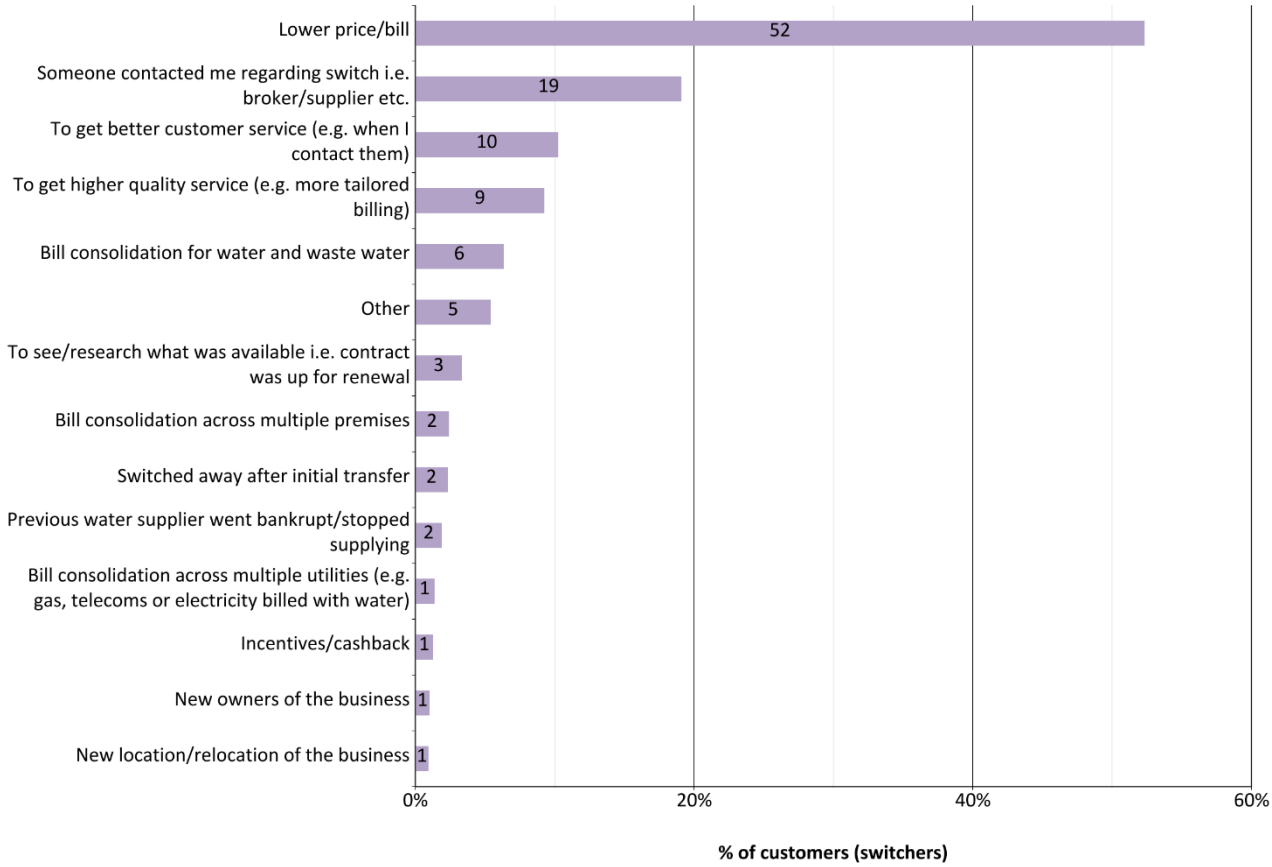
Motivations for switching or renegotiating

4.34 Customers who had switched clean water and waste water retailers, or those who had opted to renegotiate with existing retailers, were asked questions about their motivations for doing so.

4.35 When asked these questions, customers were requested to *only* reply in regards to their most recent switch or renegotiation. Their answers are reported below.

Motivations for switching

Figure 52: Why did you start looking into switching?

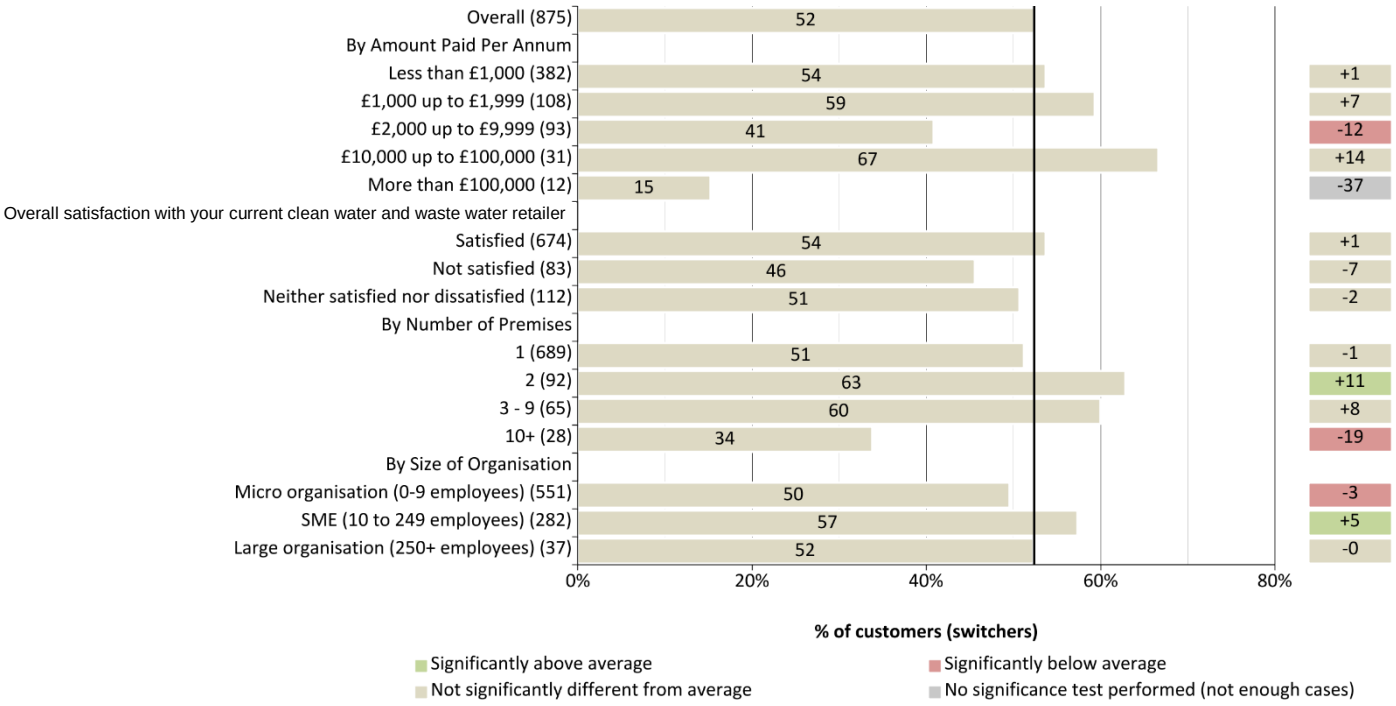


Base: All switchers (875)

4.36 More than half of switchers (52%) reported that reducing their spending on water was a prompt for looking at switching suppliers. The next most common reason given was that the customer had been contacted by someone to see if they were interested in switching; this was a driver for around one fifth (19%) of switchers. 10% responded by saying that an improvement in customer service (i.e. the quality of contact) was important to their decision to start searching, and 9% said higher quality service such as tailored billing would prompt their looking into switching.

4.37 Although less common, around 1 in 20 (6%) of customers said that consolidating their clean and waste water bills was a motivating factor, along with 2% stating that consolidating bills across multiple premises was important.

Figure 53: Switchers for whom a lower price for clean and waste water services was a motivator

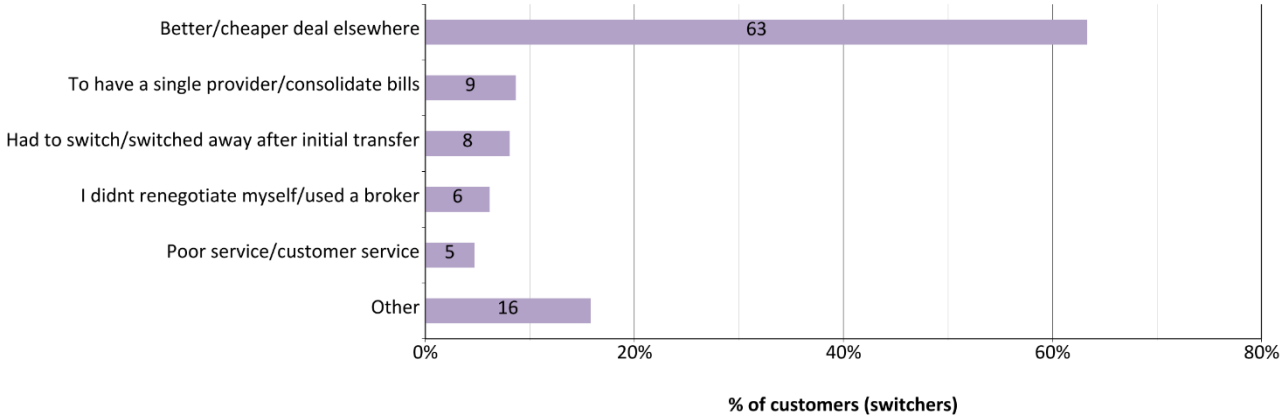


Base: All Switchers (number of respondents shown in brackets)

4.38 Getting a lower price for water savings was a priority for more than half of switchers (52%).

4.39 Organisations with 10 or more premises were more likely to cite other motivations for switching, such as consolidated billing (52%) or better customer service (30%). Nearly a third (32%) of customers with 10+ premises said that consolidating billing across multiple sites was a motivator, and around a fifth (19%) cited consolidating billing for clean and waste water services.

Figure 54: You mentioned earlier that you both renegotiated and switched. Why did you decide to switch after having renegotiated?

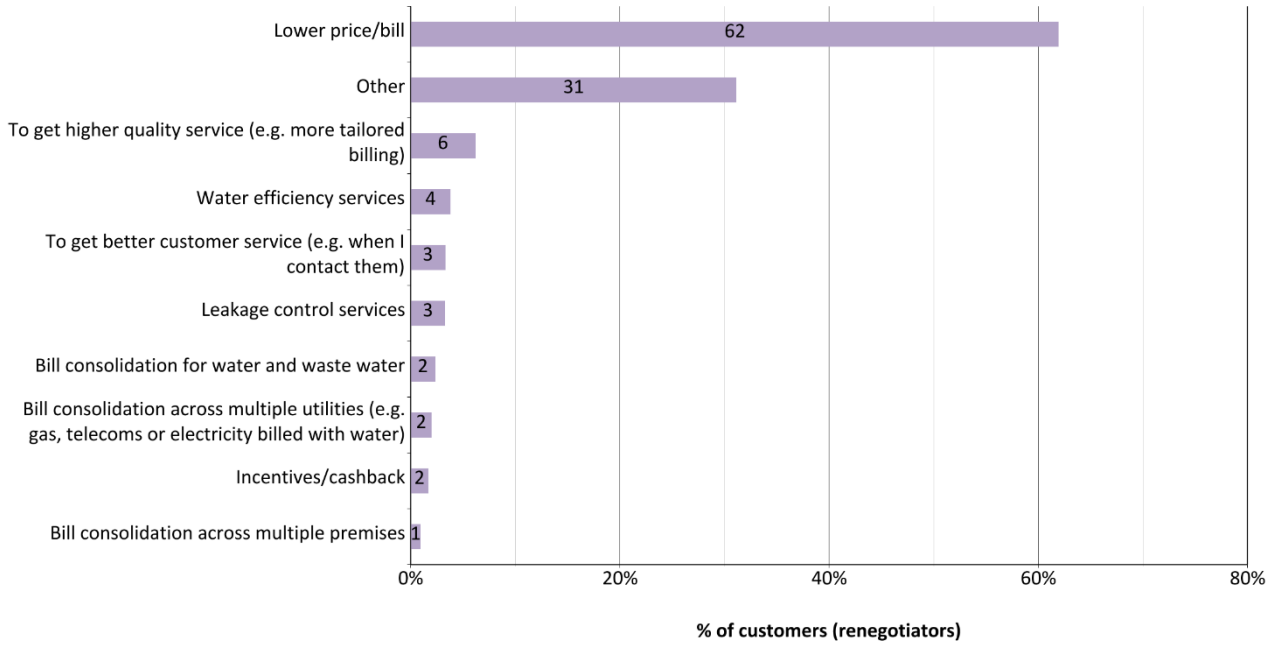


Base: All switchers who had previously renegotiated with their retailer (74)

4.40 Nearly two thirds of customers who had previously renegotiated with their clean and/or waste water retailer, and subsequently chosen to switch, did so because they found a better or cheaper deal elsewhere.

Motivations for renegotiating

Figure 55: Why did you start looking into renegotiating?



Base: All renegotiators (89)

4.41 The greatest single motivating factor given by customers for looking into renegotiating was that of aiming reducing spending on water services, with around three fifths (62%) giving this as a reason. A wide variety of other reasons for looking were mentioned by customers, with only looking for higher quality services exceeding 1 in 20 answers given.

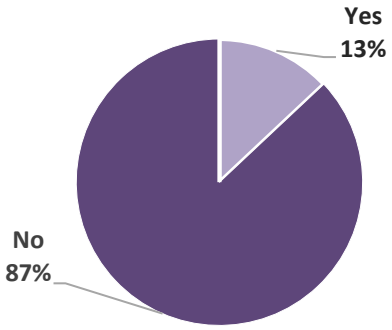
4.42 Other reasons that customers gave for seeking to renegotiate were new water efficiency services, improved customer service, and bill consolidation, among others. Several customers said that contact from their own supplier, another supplier or a broker, was a reason for starting to look at renegotiating with their current retailer.

Bill consolidation

4.43 When specifically looking at area of bill consolidation, we have seen in Figure 52 that for customers who only looked into switching, 6% did so in order to consolidate their water and wastewater, 2% did so in order to consolidate bills across multiple premises, and 1% looked into consolidating their bills across multiple utilities. For renegotiators, 2% looked into consolidating their bills for water and waste water, 2% did so for multiple utilities, and 1% looked into consolidating bills across multiple premises.

4.44 When looking at switchers and renegotiators combined, we can see in Figure 56 in the overleaf that 13% of switchers/renegotiators started looking into either switching or renegotiating in order to consolidate their bills for either clean water and wastewater, for across multiple premises, or multiple utilities. It also worth noting that the number of 'not known' respondents (unweighted) was 125.

Figure 56: Was bill consolidation a reason for you to start looking into switching or renegotiating?



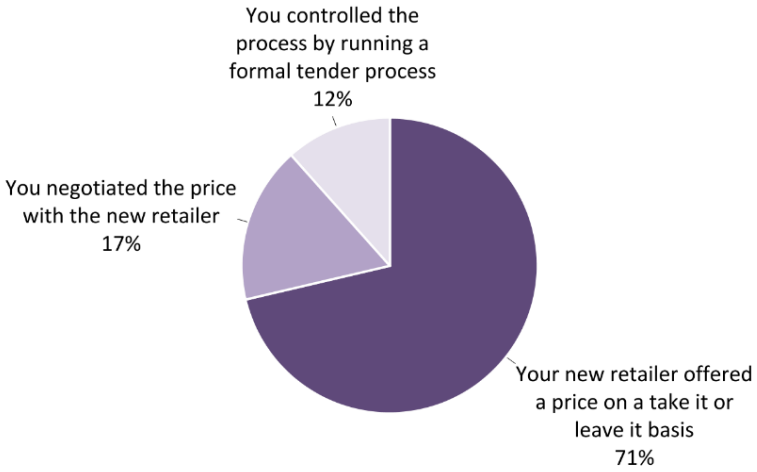
Base: Customers who were asked about whether bill consolidation was a reason they looked into switching or renegotiating (964)

The process of switching or renegotiating

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

Switchers

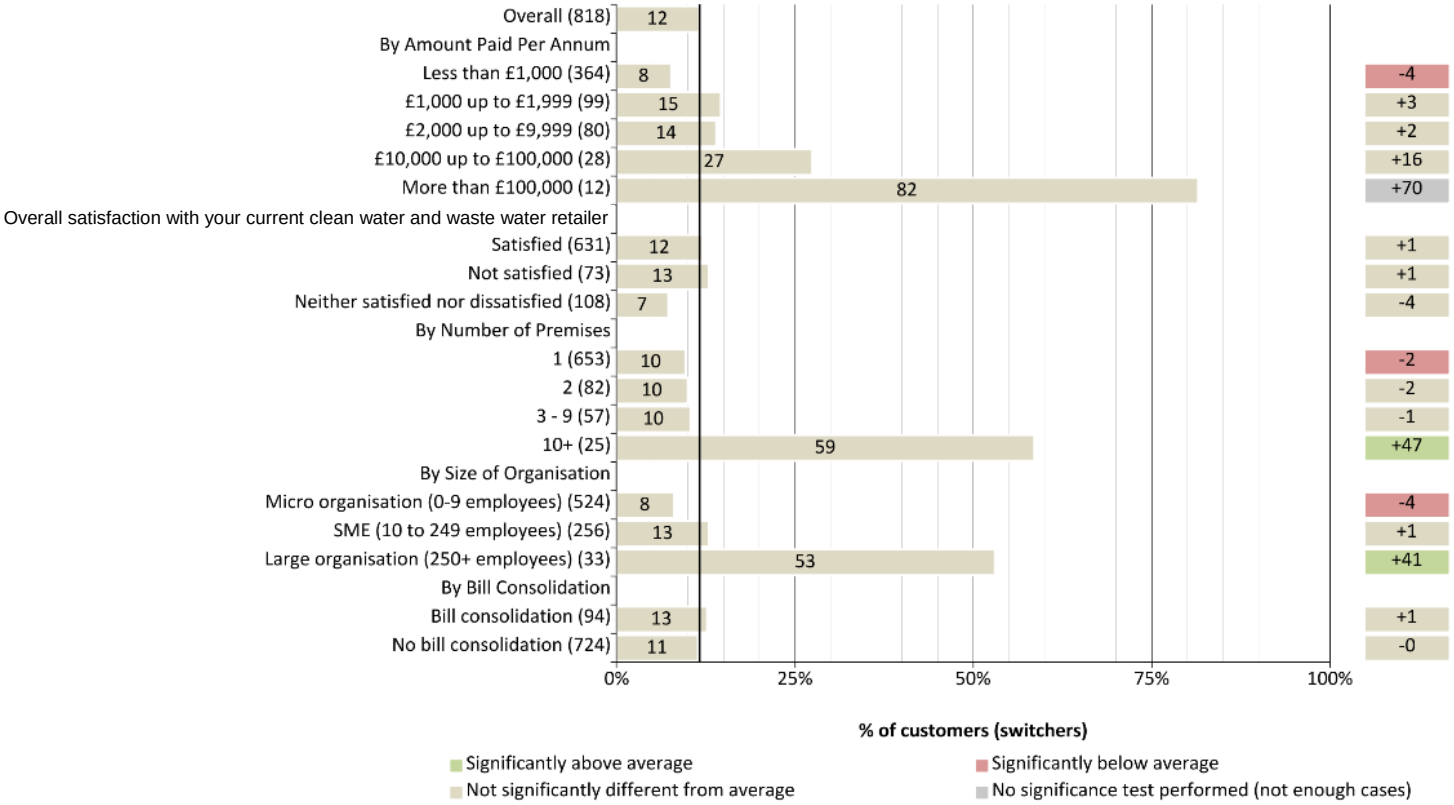
Figure 57: Which of the following best describes your experience of agreeing a price with your new retailer?



Base: All switchers (818)

4.46 Around 7 in 10 (71%) customers who switched clean water or waste water retailers were given a "take-it-or-leave-it" quote before switching, and fewer than 1 in 5 (17%) actively negotiated a price with their new retailer.

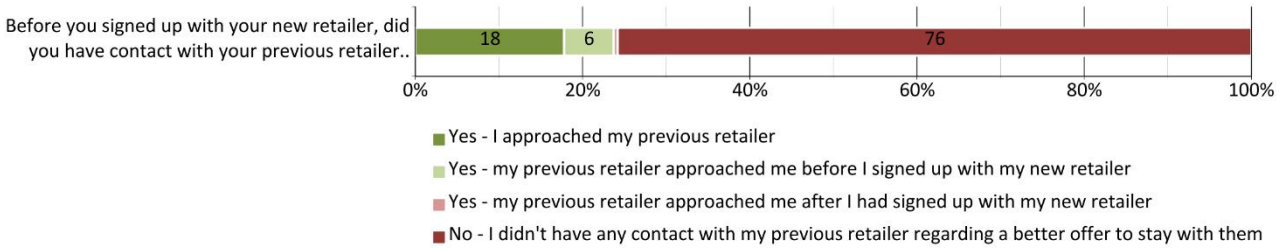
Figure 58: Switchers who used a formal tender process to find a new retailer



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

4.47 Around one eighth (12%) of customers reported using a formal tender process to find a new retailer. Large organisations and those with 10 or more premises were most likely to put their water supply out to tender.

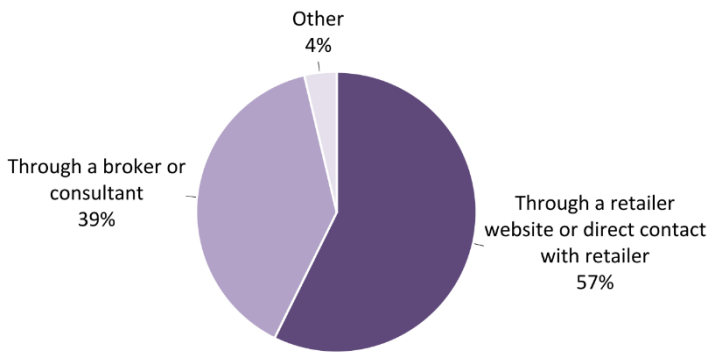
Figure 59: Did you have contact with your old retailer regarding the possibility of a better deal before switching?



Base: All switchers (877)

4.48 More than three quarters (76%) of customers who switched supplier for their clean and/or waste water supply were not contacted by their old retailer prior to switching. Of those customers who did have contact with a previous retailer, around 1 in 10 (11%) received an offer of a reduced price. This may suggest that retailers, for the most part, have low key retention services.

Figure 60: How did you arrange the switch?

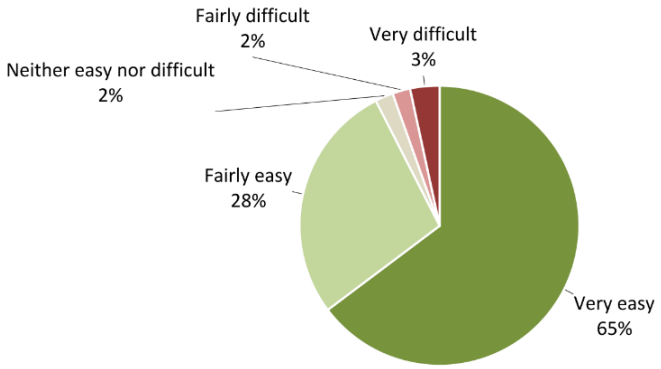


Base: All switchers (888)

4.49 The majority (57%) of switchers arranged the process via direct contact with their new retailer or by using the retailer's website. Around two fifths (39%) of all switchers reported using a broker or consultant to make the switch.

4.50 While 4% of switchers initially reported using another method to arrange the switch, when asked for more detail the majority went on to explain that they had, in fact, switched via either a broker or directly with their new retailer. Other methods cited were via the local council or through a price comparison website.

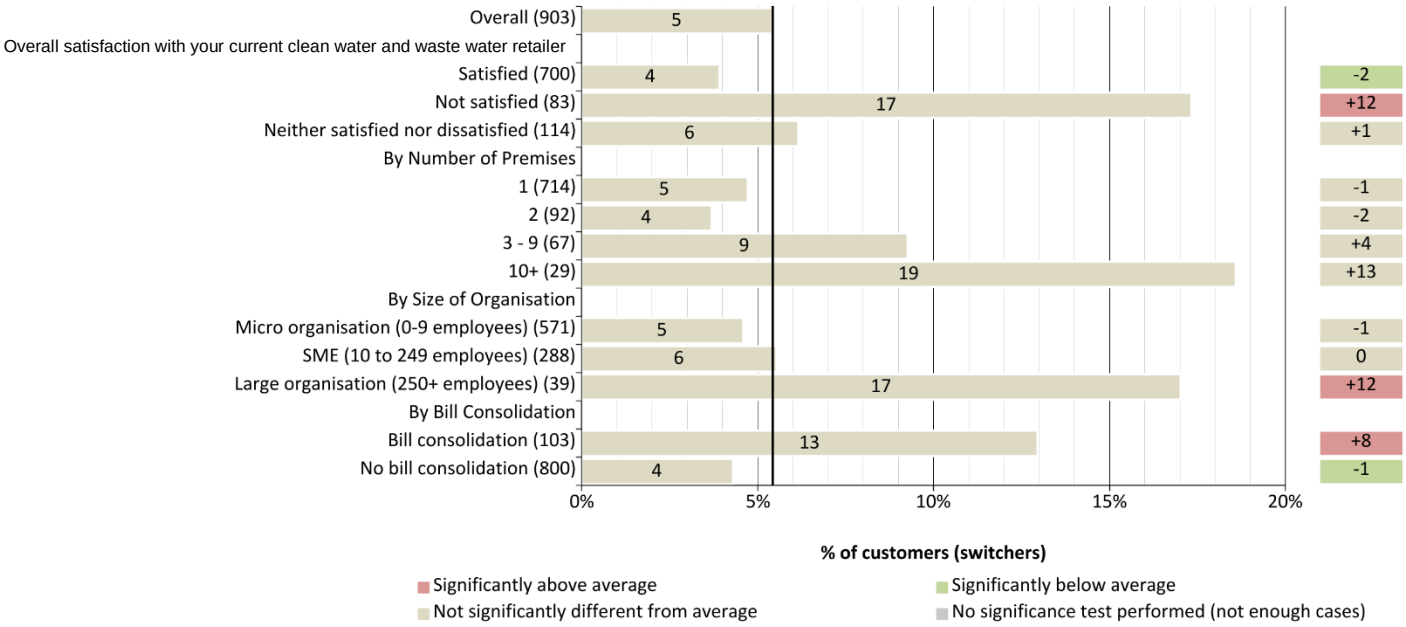
Figure 61: Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?



Base: All switchers (903)

4.51 Only 1 in 20 (5%) of customers who switched reported finding the process difficult, with nearly two thirds (65%) finding it very easy, and more than a quarter (28%) reporting that they found the process fairly easy.

Figure 62: Customers who found the process of switching retailer difficult

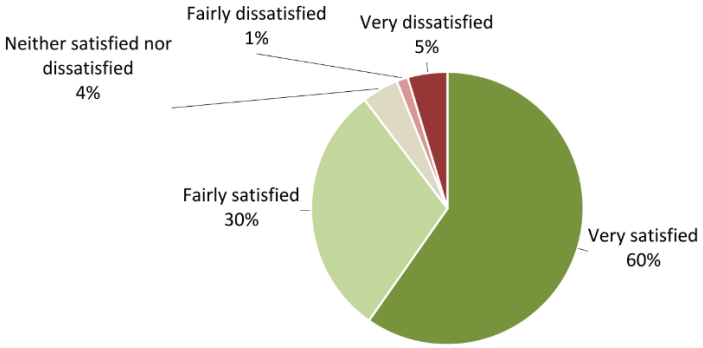


Base: All switchers (number of respondents shown in brackets)

4.52 Large organisations were significantly more likely than average to report that the process of switching retailers was difficult, as were customers who had their bills consolidated. A similar trend was seen among customers with 3 or more premises.

4.53 Customers who were not satisfied with their current retailer were also significantly more likely to report that they had found the process of switching difficult.

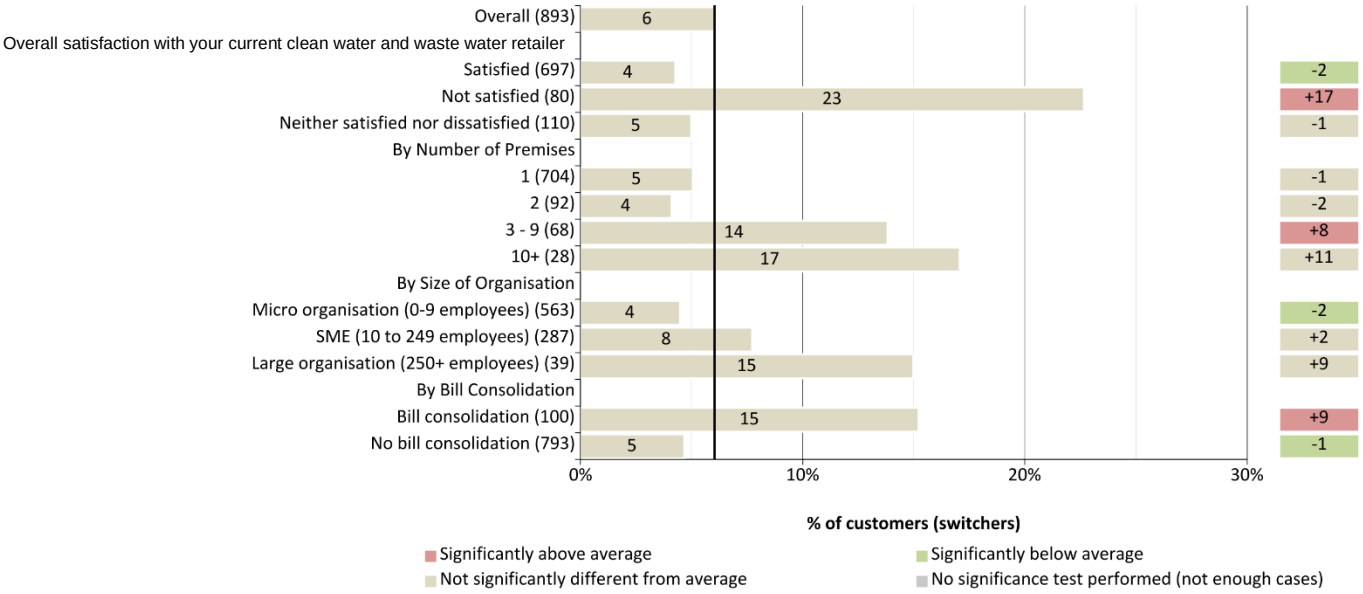
Figure 63: How satisfied or dissatisfied were you with the time it took for the switch to take place?



Base: All switchers (893)

4.54 Nine in ten customers (90%) reported being satisfied with the amount of time taken for the switchover to a new retailer to take place, with around 1 in 20 (6%) reporting being dissatisfied.

Figure 64: Customers who were dissatisfied with the time it took for the switch to take place



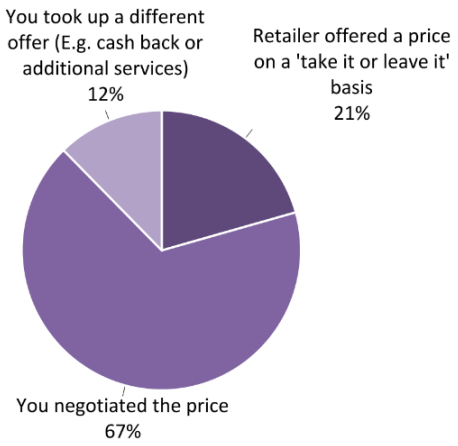
Base: All Switchers (number of respondents shown in brackets)

4.55 Those customers who reported being dissatisfied with the time taken to process the switch to their new supplier had a similar demographic profile to those who found the process difficult. For example, customers with three or more premises, those who had consolidated billing as part of the switch and those who expressed dissatisfaction with their current retailer were all more likely to have been dissatisfied with the length of the switching process.

4.56 Large organisations also tended to be dissatisfied with the length of time the switching process took.

Renegotiators

Figure 65: Which of the following best describes your experience of agreeing a new deal with your existing retailer?



Base: All renegotiators (87)

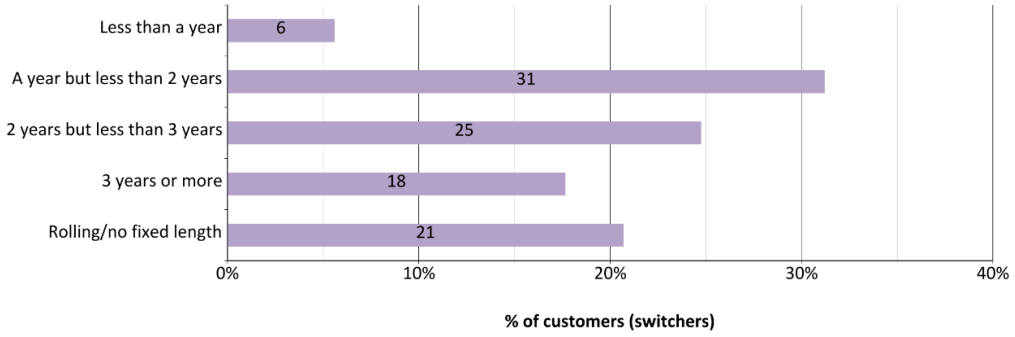
4.57 More than two thirds (67%) of customers who renegotiated with their existing supplier, rather than switching, negotiating a new price before accepting it. Around one in five customers (21%) accepted a "take-it-or-leave-it" offer from their existing retailer and around 1 in 8 (12%) took up a different type of offer.

Outcomes of switching or renegotiating

4.58 Customers who switched clean water and/or waste water retailers, or negotiated a new deal with their existing supplier(s) were asked questions about the outcomes of the process. Customers were requested to reply only in regards to their most recent switch or renegotiation.

Outcomes for switchers

Figure 66: Thinking only about your most recent switch...What is the total length of your new contract?

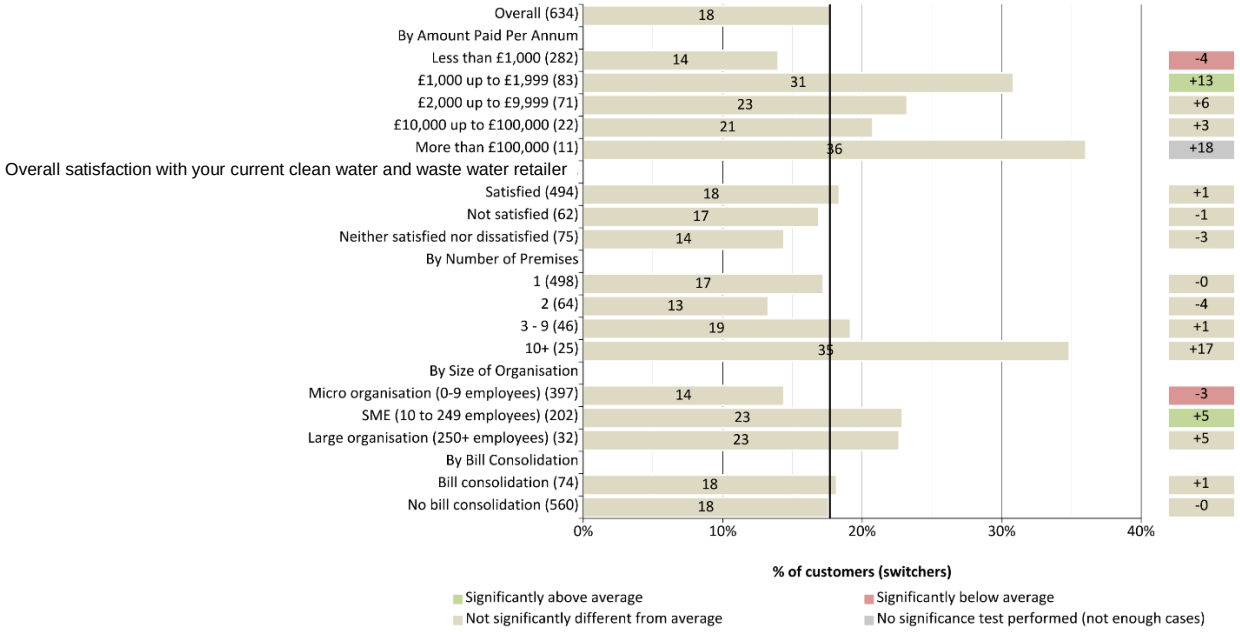


Base: All Switchers (634)

4.59 Around 3 in 10 customers (31%) who switched retailers had signed up for a 1-2 year contract. One quarter (25%) signed a 2-3 year contract and less than two fifths (18%) of took on a contract of 3 years or more.

4.60 Around two fifths (21%) of customers were on a rolling contract with no fixed term, and around 1 in 17 (6%) reported being on a contract of less than one year.

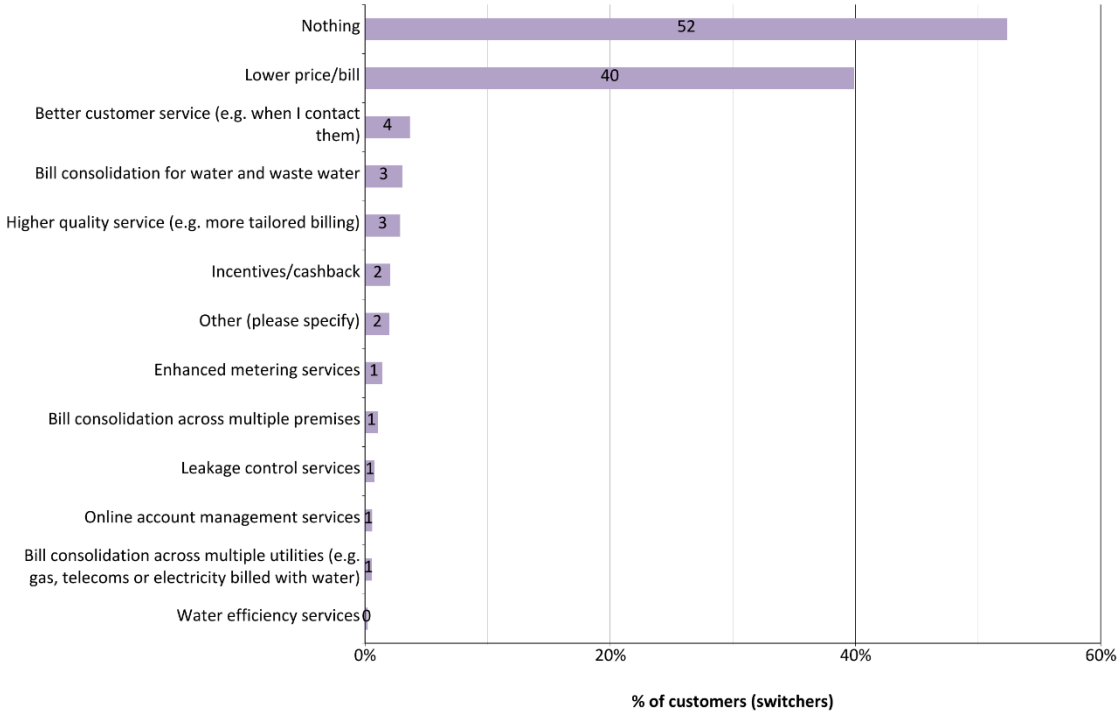
Figure 67: Switchers who signed up for contracts of three years or more



Base: All Switchers (numbers of respondents in brackets)

4.61 SMEs were significantly more likely than average to sign up to fixed term contracts of three years or more, as were those who spent £1000 or more on water per annum. Large organisations and those with more than three premises were also more likely than average to sign contracts of three years or longer.

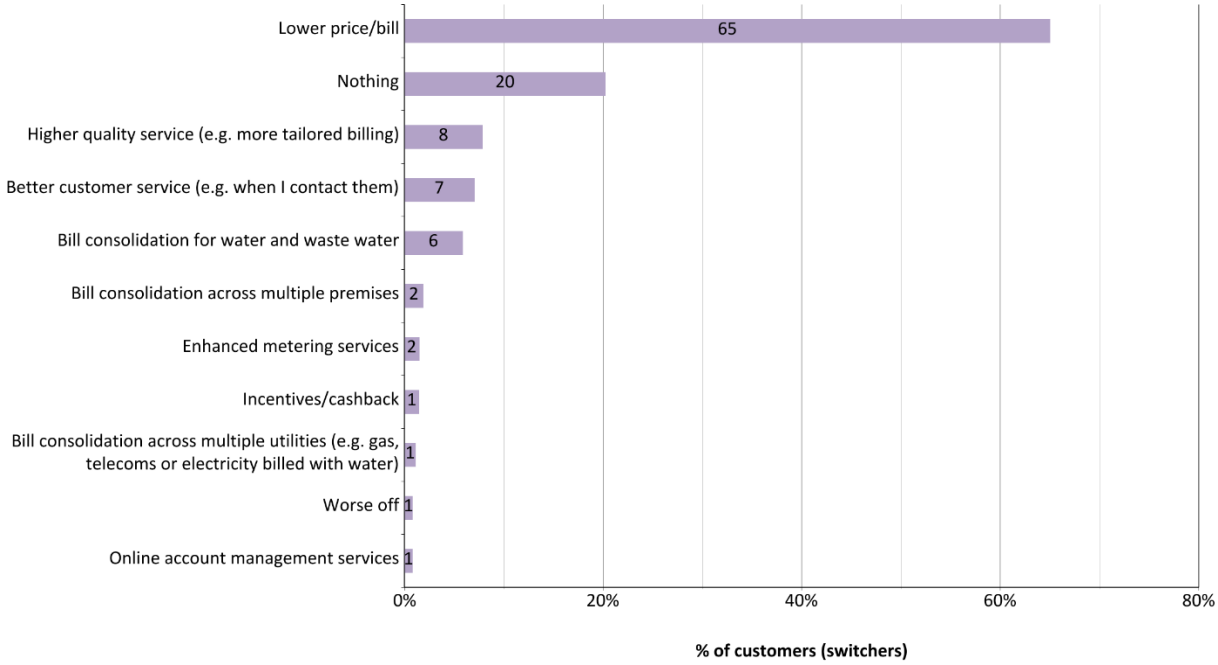
Figure 68: When you switched, did your new retailer commit to providing any specific benefits? What were these?



Base: All Switchers (874)

4.62 In Figure 68, we can see that more than half (52%) of customers who switched clean and/or waste water retailers said that their new retailer did not commit to any specific benefits at all. Two fifths (40%) reported that their new retailer committed to providing lower prices.

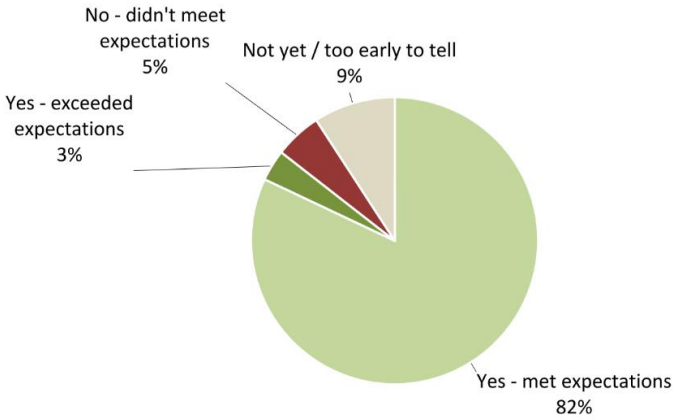
Figure 69: What benefits, if any, did you actually get from switching?



Base: All Switchers (876)

4.63 In Figure 69, we can see that nearly two thirds (65%) of switchers reported actually benefiting from a lower price/bill when they switched. 8% said they benefitted from a higher quality service and 7% said they benefitted from better customer service

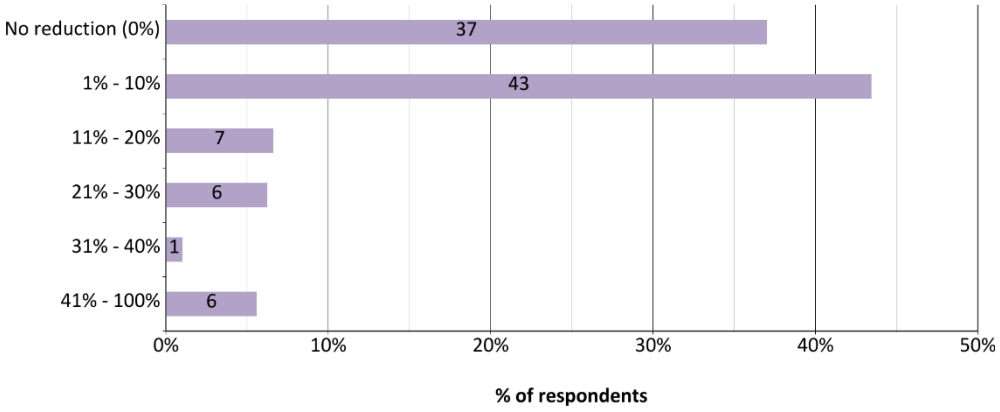
Figure 70: Did the benefits meet your expectations?



Base: All Switchers (720)

4.64 Around five out of six (84%) of switchers reported that the benefits they had received either met or exceeded their expectations. 1 in 20 (5%) said that their expectations had not been met and around 1 in 10 (9%) said that they were not able to answer that question yet.

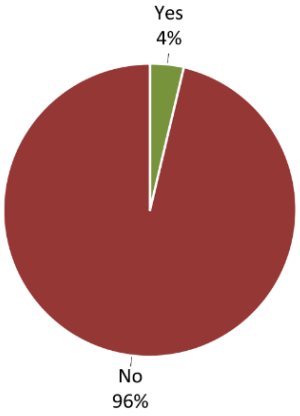
Figure 71: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of switching retailer, if at all?



Base: Switchers who expected or had seen a reduction in their bills (534)

4.65 43% of switchers who had seen a reduction in their bills, or expected to, said that this was between 1%-10%; one fifth (20%) reported a greater saving than 10% of their bill. More than one third (37%) said that they had seen or anticipated no reduction in their bills.

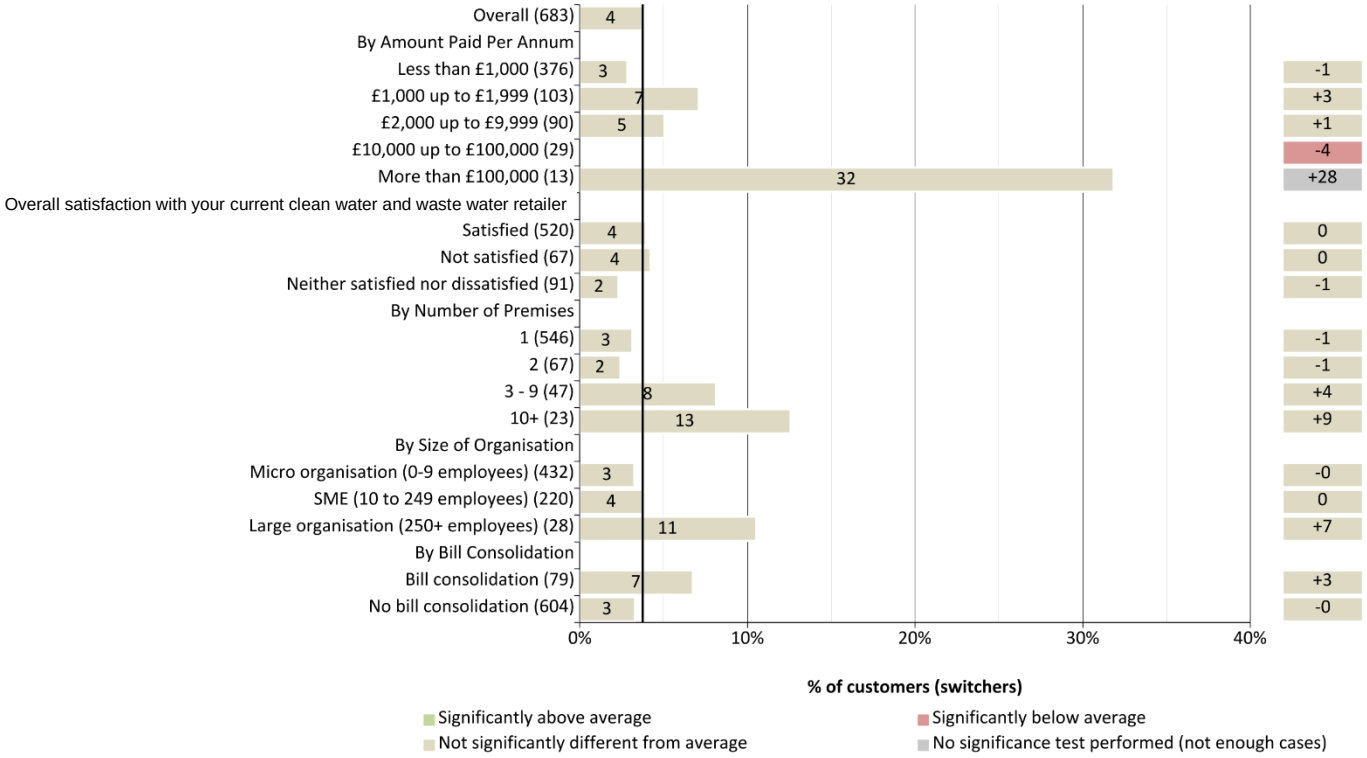
Figure 72: Do you now receive any new water efficiency or leak detection services as a result of switching?



Base: All switchers (683)

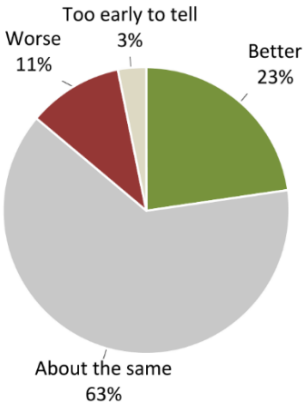
4.66 Less than 1 in 20 (4%) of switchers who were asked whether they had received new water efficiency or leak detection services by their new retailers said that this was the case.

Figure 73: Switchers who received new water efficiency or leak detection services as a result of switching, by subgroup



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

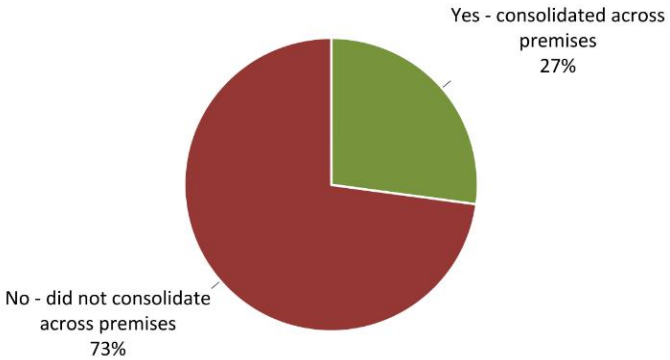
Figure 74: Is the quality of retail services like billing and meter-reading from your new retailer better, worse, or about the same as your previous retailer?



Base: All switchers (705)

4.67 When asked about the quality of services such as billing and meter readings post-switch, nearly two thirds (63%) of customers said that they were about the same as with their previous retailer. Around a quarter (23%) stated that these services had improved, and around 1 in 10 (11%) said that there had been a reduction in quality.

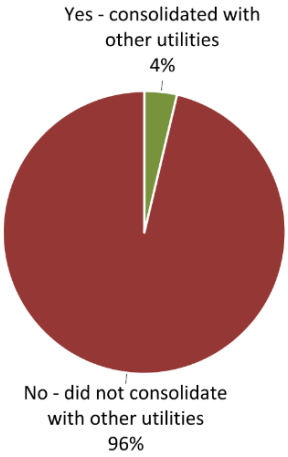
Figure 75: As a result of switching, have you consolidated your water bill across multiple premises into a single bill?



Base: Switchers with more than one premises (252)

4.68 Over a quarter (27%) of switchers with two or more premises had consolidated their water bills across these premises into a single bill

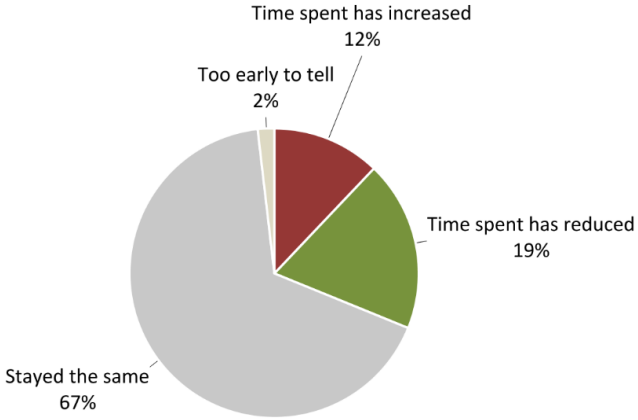
Figure 76: As a result of switching, have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas into a single bill?



Base: All switchers (718)

4.69 Fewer than 1 in 20 (4%) of customers who switched suppliers reported consolidating other utilities into a single bill with their clean and/or waste water supply.

Figure 77: Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching?



Base: All switchers (711)

4.70 Around two thirds (67%) of switchers reported that the amount of time they spent dealing with water billing had stayed roughly the same since switching retailers. Around one fifth (19%) reported a reduction in time spent on billing, and around 1 in 8 (12%) reported an increase.

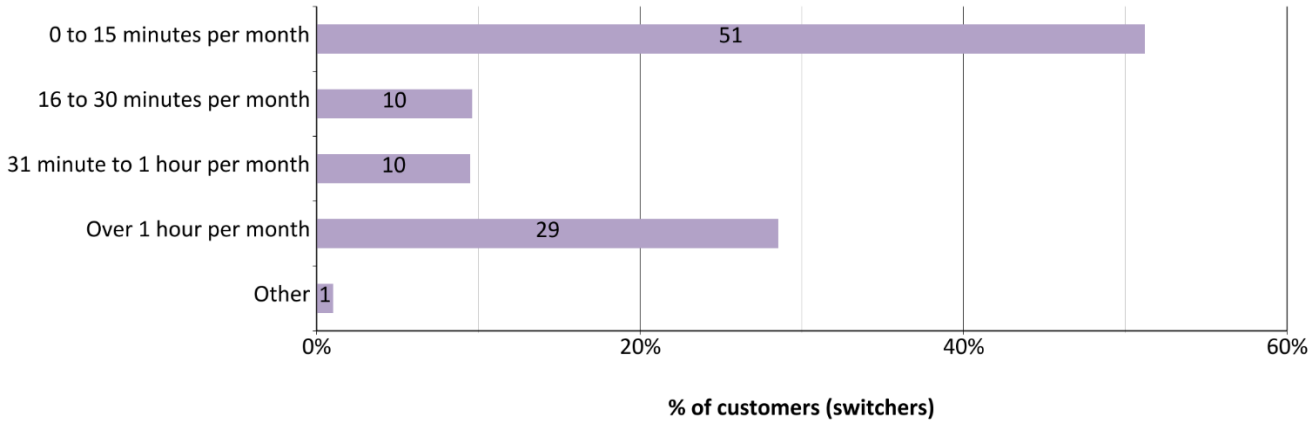
Figure 78: Eligible customers who switched / renegotiated broken down by organisation size

% eligible customers	Time spent has increased	Time spent has reduced	Stayed the same	Too early to tell
Micro businesses (0-9 employees)	11	17	70	2
SME customers (10-249 employees)	16	18	64	1
Large customers (250+ employees)	5	51	40	3
All switchers	**12**	**19**	**67**	**2**

Base: All switchers (711)

4.71 Results show that large organisations were significantly more likely to report that the time their organisation spends dealing with their water bills each billing cycle had reduced (51%), with 5% saying it had increased. The situation regarding SMEs was more balanced, with similar proportions saying the time their organisations spent dealing with bills had decreased, as increased (18% and 16%, respectively). It is worth noting the proportion of SMEs that reported an increase in time spent is significantly higher than organisations overall (16% cf. 12%).

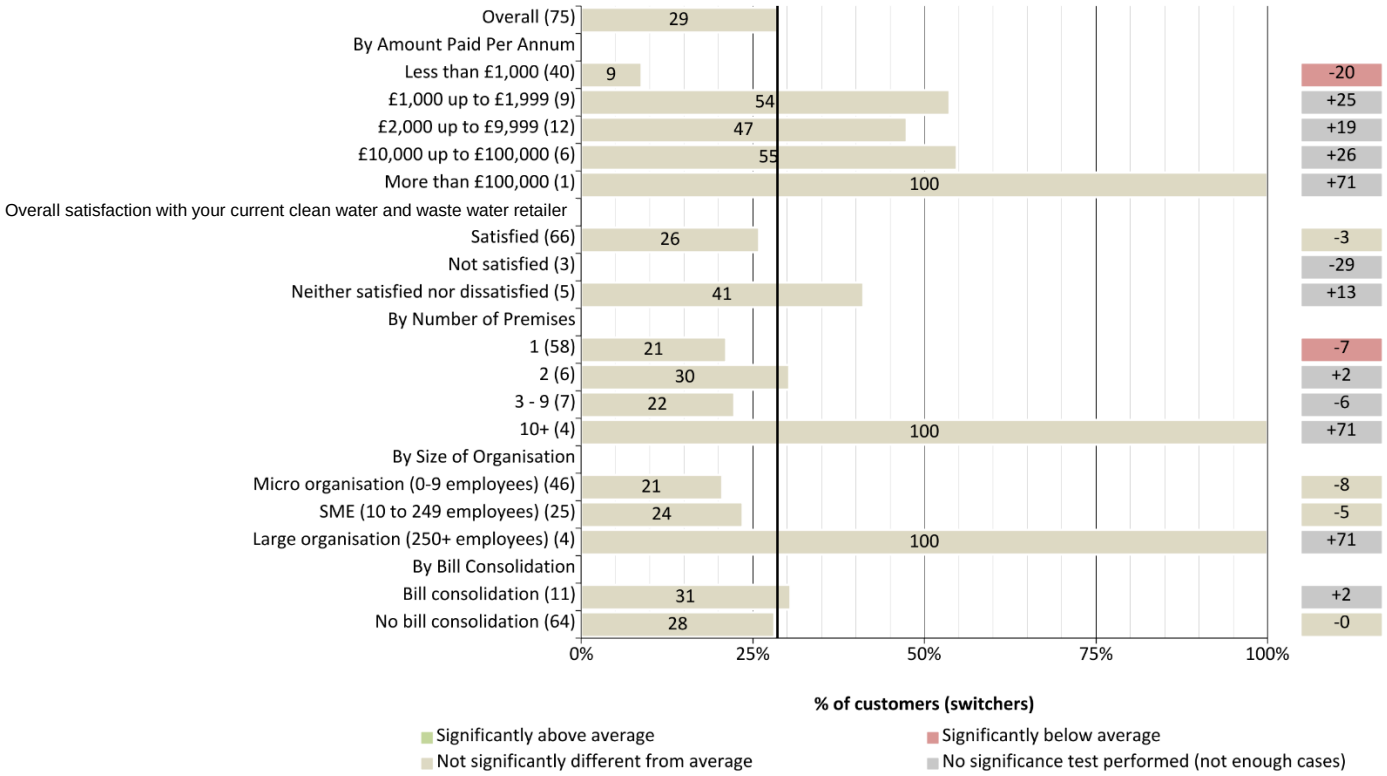
Figure 79: How much time spent dealing with water bills do you think your organisation has saved since switching?



Base: Switchers who reported saving time as a result of switching (75)

4.72 Around half (50%) of customers who reported saving time as a result of switching their water retailer stated that this amounted to 15 minutes or less per month. Around 3 in 10 (29%) reported time savings in excess of one hour per month.

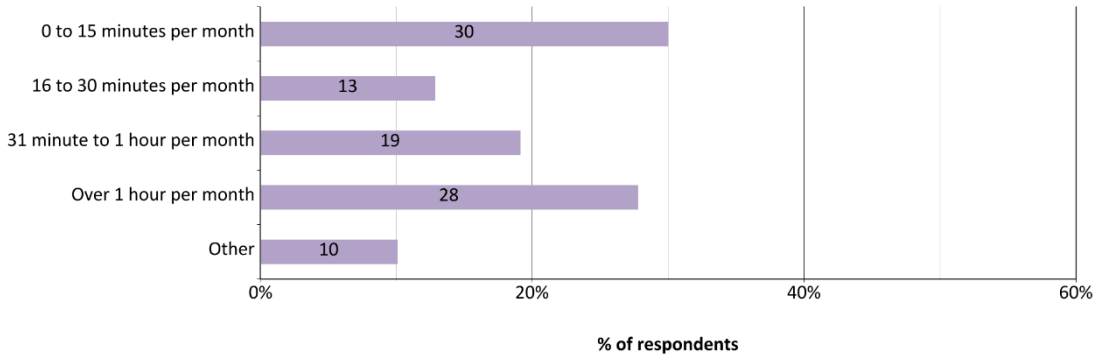
Figure 80: Customers who reported saving more than one hour per month, by subgroup



Base: Switchers who reported saving time as a result of switching (number of respondents shown in brackets)

4.73 Customers who spent less than £1000 per year on water services and/or with just one premises were significantly less likely to report saving an hour or more per month than other customers who reported a time saving as a result of switching retailer(s).

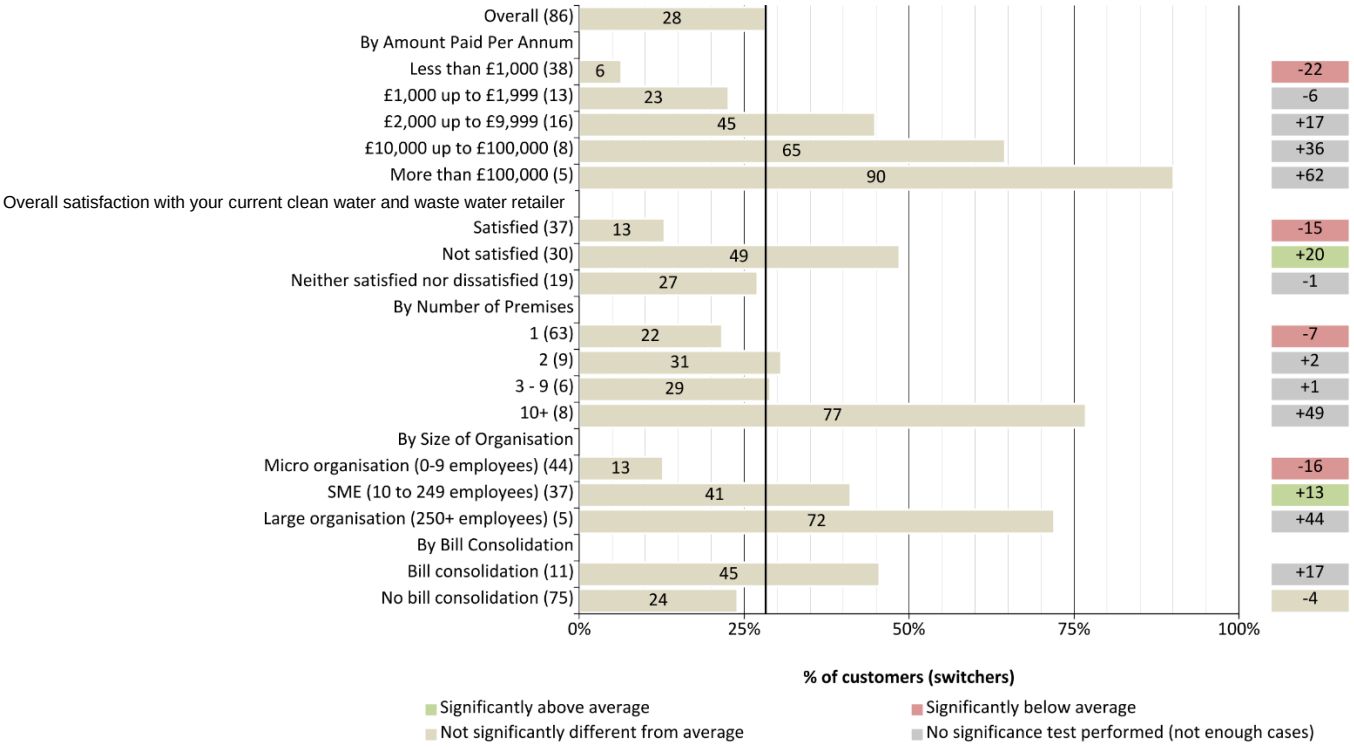
Figure 81: How much time spent dealing with water bills, per month, do you think your organisation has lost since switching?



Base: Switchers who reported losing time as a result of switching (86)

4.74 3 in 10 (30%) of customers who reported losing time to dealing with water billing as a result of switching water retailer stated that this amounted to 15 minutes or less per month. Nearly 3 in 10 (28%) reported spending in excess of one hour per month extra post-switch.

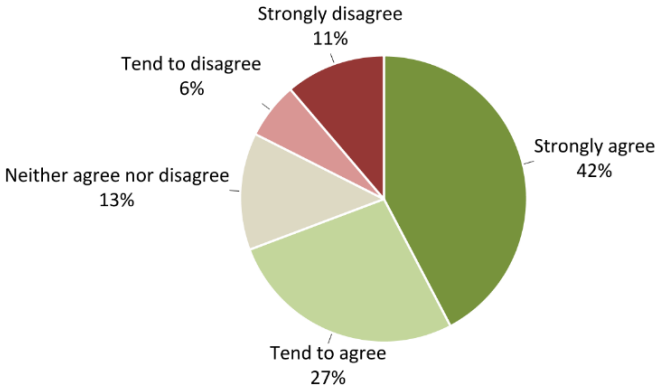
Figure 82: Customers who reported losing more than one hour per month, by subgroup



Base: Switchers who reported losing time as a result of switching (number of respondents shown in brackets)

4.75 Customers who reported losing more than an hour per month in dealing with water bills were significantly more likely to be from an SME or a large organisation.

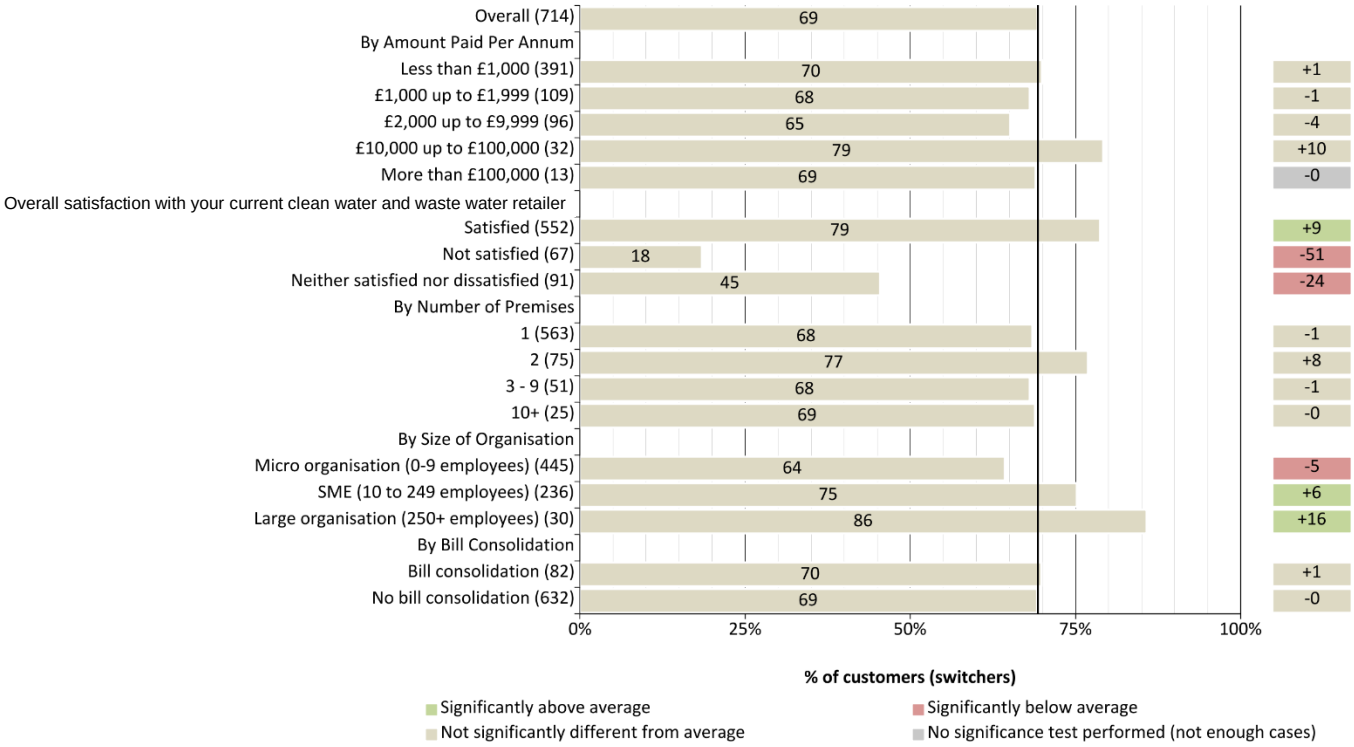
Figure 83: Overall, taking the whole experience of switching into account, do you agree or disagree that it was worthwhile for you to switch?



Base: All switchers (714)

4.76 Overall, having answered questions about their experience of switching water retailers, around 7 in 10 customers said that switching had been worthwhile. Almost a fifth (18%) said that it was not worthwhile.

Figure 84: Customers who felt it was worthwhile to have switched clean and/or waste water retailer(s)



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

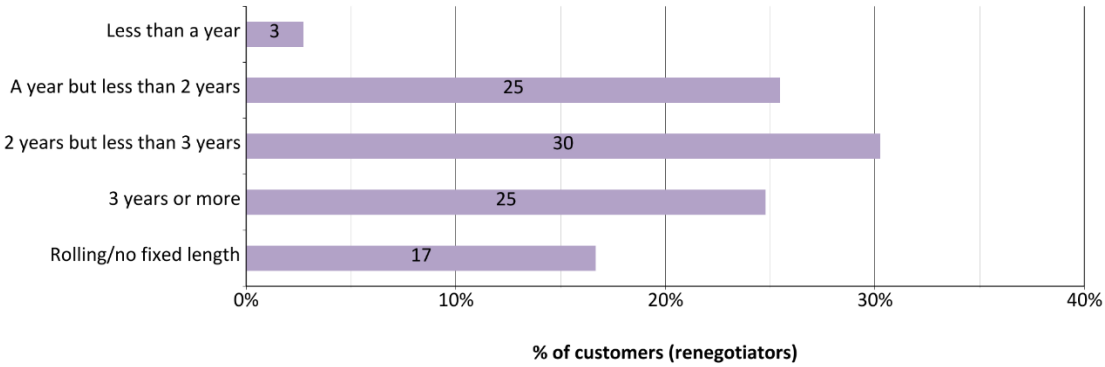
4.77 SMEs and large organisations were significantly more likely to agree that switching retailers for water services had been worthwhile than switchers overall, whereas micro-organisations were significantly more likely to feel the opposite.

4.78 As might be expected, switchers who reported being satisfied with their current retailer were significantly more likely to say that the process had been worthwhile than switchers overall. Conversely, those who were *not* satisfied or were neutral were significantly less likely to feel this way.

Outcomes for renegotiators

4.79 Renegotiators were first asked about their new contract.

Figure 85: Thinking only about your most recent renegotiation...What is the total length of your new contract?

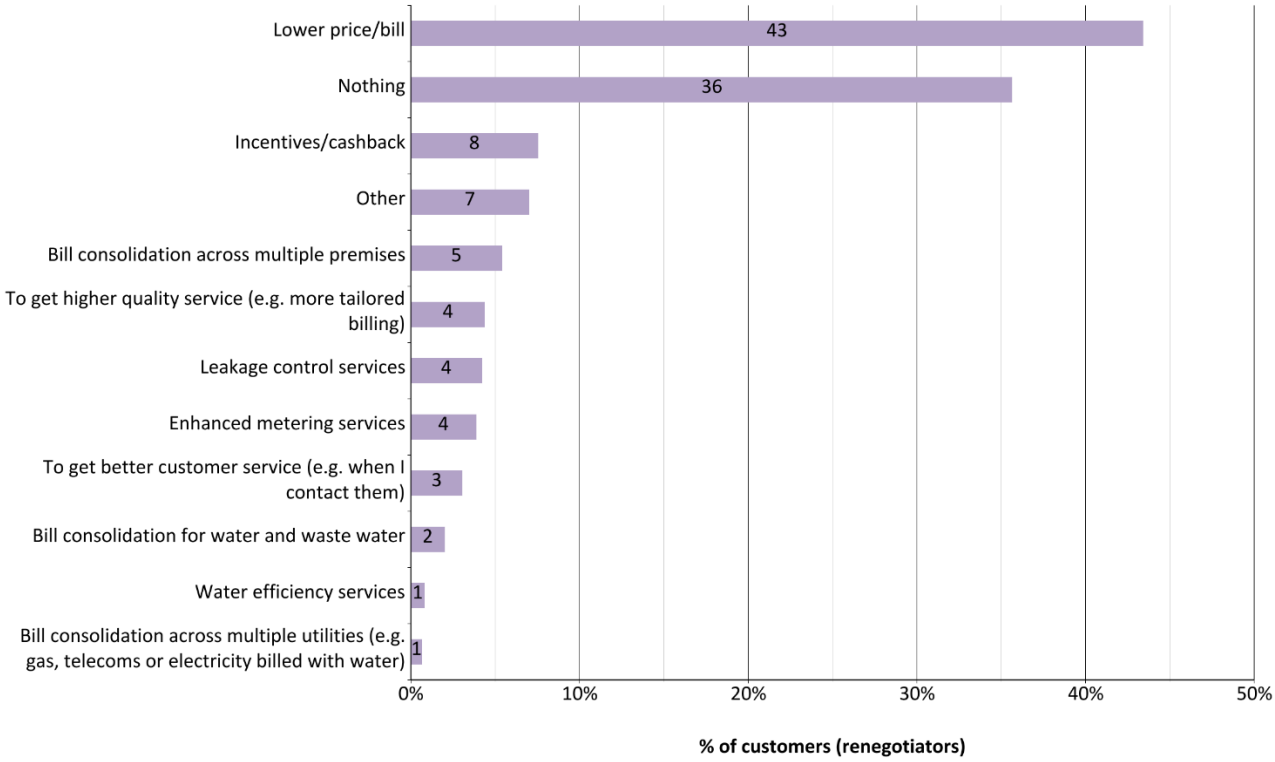


Base: All renegotiators (75)

4.80 Around 3 in 10 customers who renegotiated their contract with their current retailer had signed up for a 2-3 year contract, with a quarter choosing a 1-2 year contract and a further quarter signing a contract of three years or more.

4.81 Around 1 in 6 of renegotiators were on a rolling contract with no fixed term, and just two customers in total reported being on fixed-term contracts of less than a year.

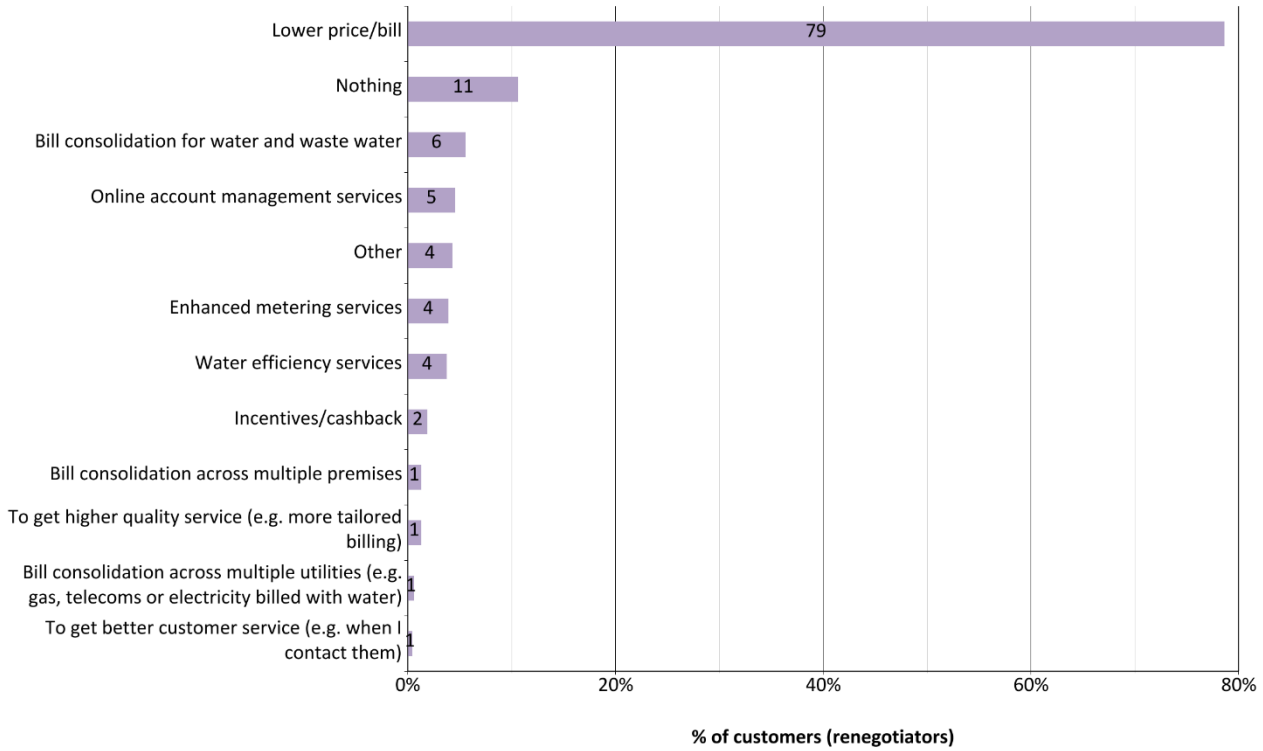
Figure 86: When you renegotiated, did your retailer commit to providing any specific benefits? What were these?



Base: All renegotiators (88)

4.82 Around two fifths of renegotiators reported that their new retailer committed to providing lower prices. More than one third of customers who negotiated a new deal with their existing clean and/or waste water retailers said that their new retailer did not commit to any specific benefits.

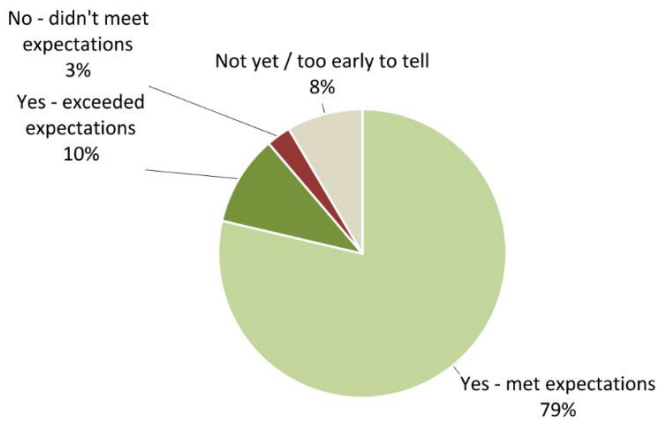
Figure 87: What benefits, if any, did you actually get from renegotiating?



Base: All renegotiators (91)

4.83 Around four fifths of renegotiators said that they had seen a reduction in the price of water services as a result of their new deal. Around 1 in 10 said that they had not received any benefit.

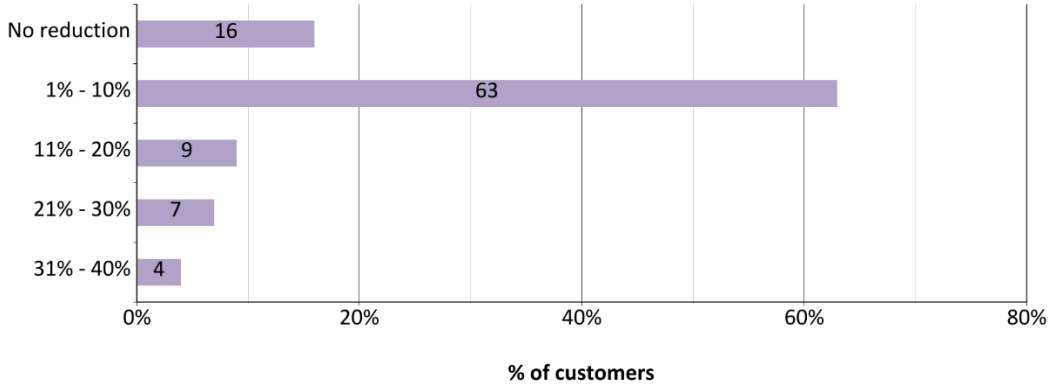
Figure 88: Did the benefits meet your expectations?



Base: All renegotiators (90)

4.84 Around 9 out of 10 (88%) of renegotiators reported that the benefits they received either met or exceeded their expectations. 3% said that their expectations had not been met and around 8% responded that they were not able to answer that question yet.

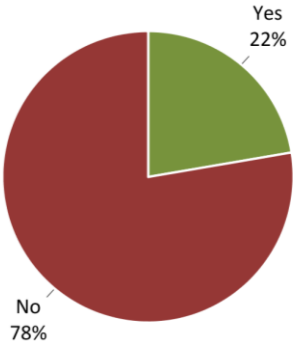
Figure 89: In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating, if at all?



Base: All renegotiators (58)

4.85 More than three fifths (63%) of renegotiators reported having, or expecting to, received a reduction of 1%-10% on their water bills as a result of negotiating a new deal with their current retailer; more than one fifth (20%) reported a saving greater than 10% of their bill. 16% said that they had seen or anticipated no reduction in bills.

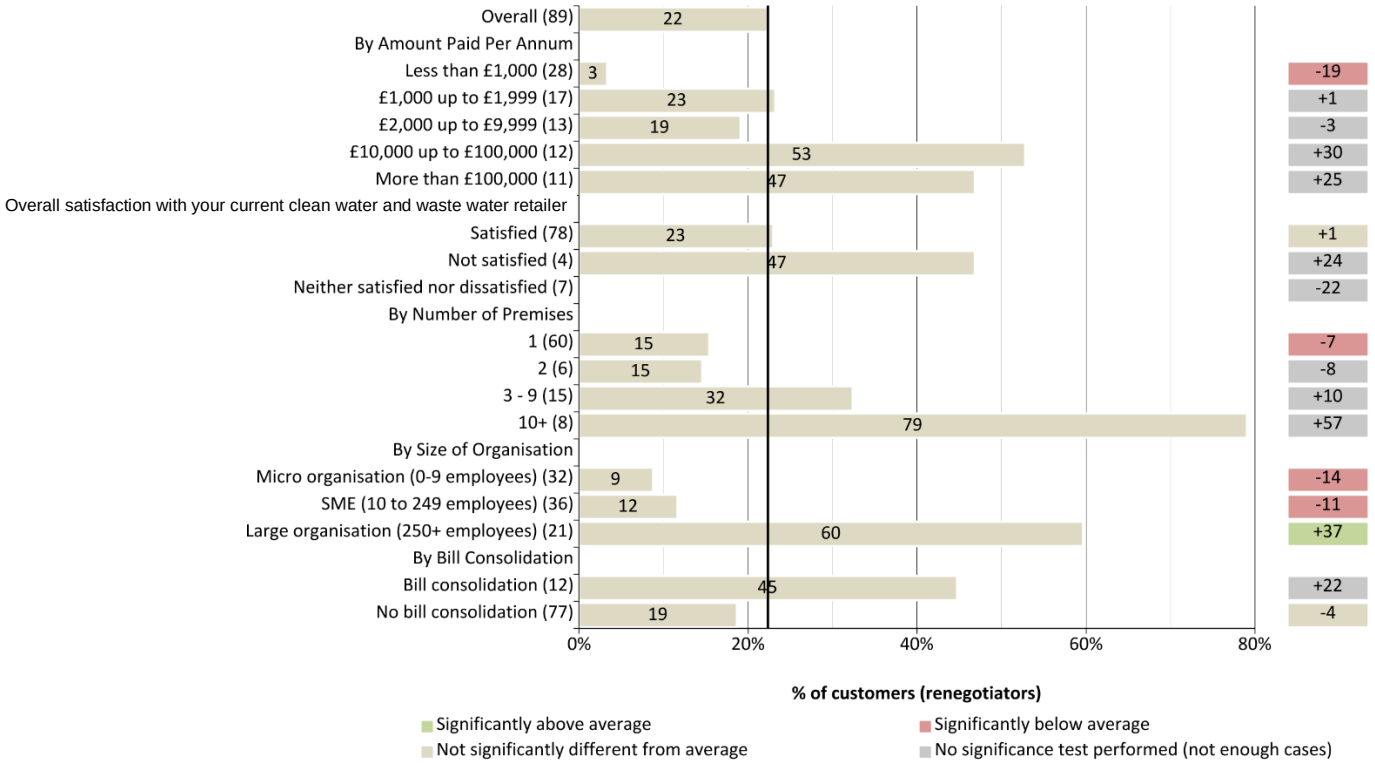
Figure 90: Do you now receive any new water efficiency or leak detection services as a result of renegotiating?



Base: All renegotiators (89)

4.86 Over one fifth of renegotiators reported receiving new water efficiency or leak detection services as a part of their new deal.

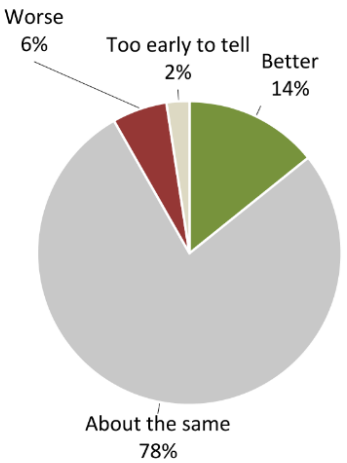
Figure 91: Customers who received new water efficiency or leak detection services as a result of renegotiating, by subgroup



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

4.87 Large organisations who signed a new deal with their existing supplier were significantly more likely than renegotiators overall to have received new water efficiency or leak detection services as a result of switching.

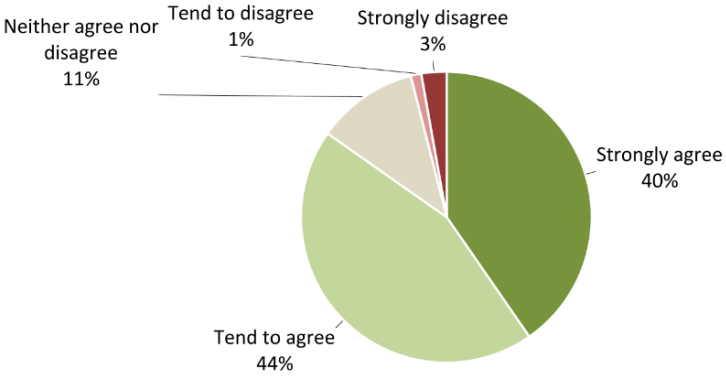
Figure 92 Is the quality of retail services like billing and meter-reading better, worse, or about the same as before you renegotiated?



Base: All renegotiators (91)

4.88 When asked about the quality of services such as billing and meter readings post-renegotiation, over three quarters (78%) of customers said that they were about the same as under their old contract. Around 1 in 7 (14%) stated that these services had improved and 6% said that there had been a reduction in quality.

Figure 93: Overall, taking the whole experience of renegotiating into account, do you agree or disagree that it was worthwhile for you to renegotiate with your existing retailer?



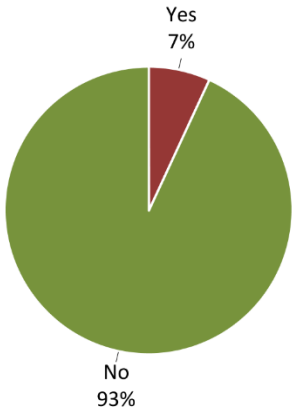
Base: All renegotiators (93)

4.89 Having answered questions about their experience of renegotiating their water supply contracts, over four fifths (84%) of customers reported that they felt it had been worthwhile to do so. Around 1 in 10 (11%) were neutral and only 4% said that it had not been worthwhile.

Problems, complaints and contact with retailers

4.90 Customers who had switched clean and/or waste water retailers, or renegotiated their contract with their existing supplier, were asked about problems they had encountered with their water supply, complaints they had need to make and other contact with their retailers. Customers' answers are reported below.

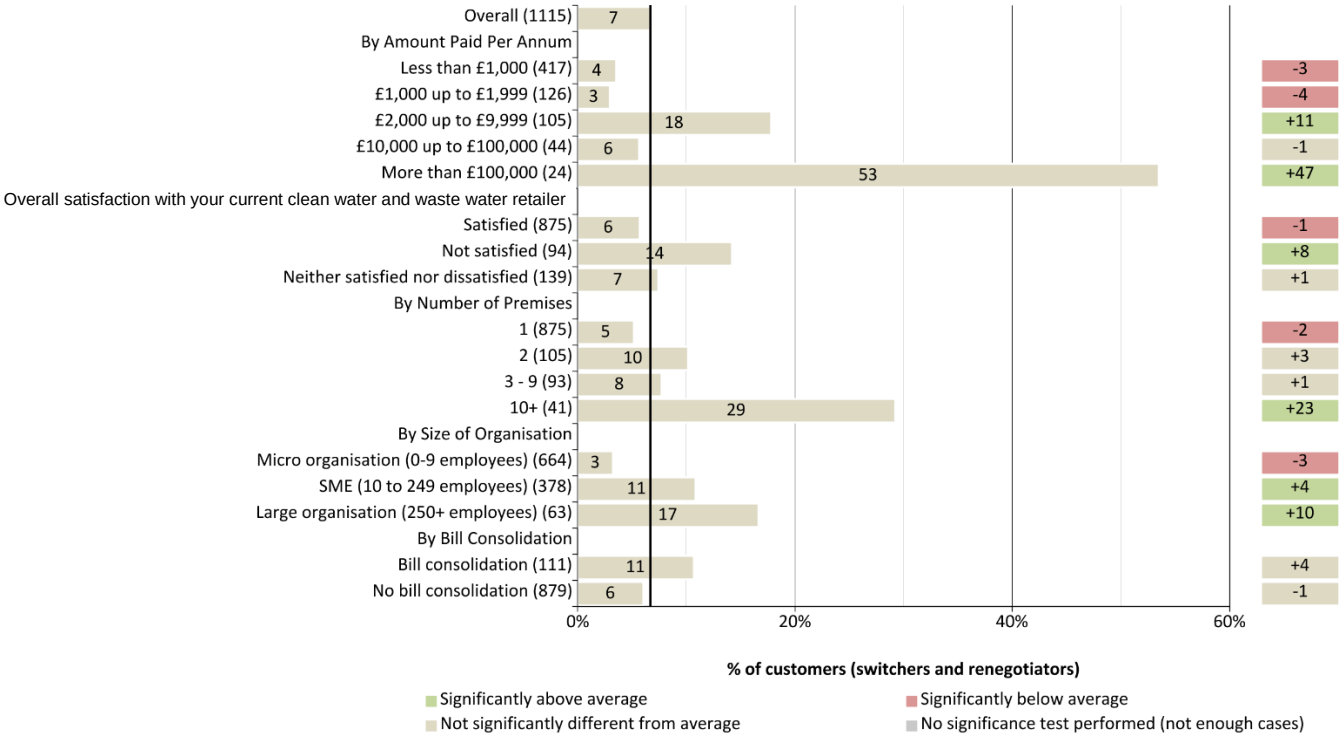
Figure 94: Have you had any problems with clean or waste water services over the last 12 months?



Base: All switchers and renegotiators (1,115)

4.91 Fewer than 1 in 10 (7%) of switchers and renegotiators reported having had problems with their water supply in the last year.

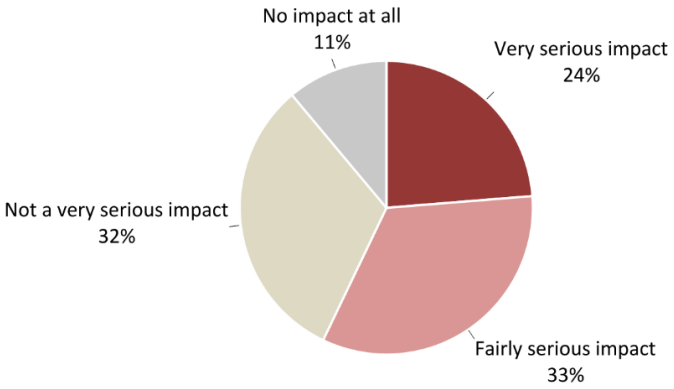
Figure 95: Customers who reported having had problems with their water supply in the last 12 months



Base: All switchers and renegotiators (1,115)

4.92 SMEs and large organisations, those with ten or more premises and those with a very large (£100,000+) annual spend on water services were all significantly more likely than switchers and renegotiators overall to report problems. Those who reported being not satisfied with their retailer were also significantly more likely to have reported problems.

Figure 96: How serious an impact did these problems have on your business?

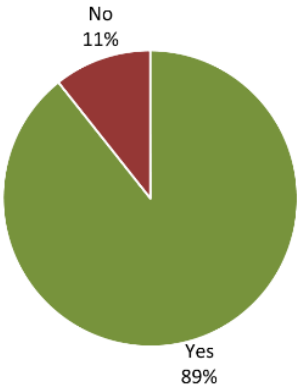


Base: Switchers and renegotiators who experienced problems in the last 12 months (72)

4.93 Of those switchers and renegotiators who experienced problems with their water supply in the last 12 months, nearly three fifths (57%) said that there was a serious impact on their organisation as a result. Around one third (32%) said that the impact had not been very serious and around 1 in 10 said that there had been no impact at all as a result of the issue.

4.94 Micro-organisations who had experience problems were significantly less likely to report a serious impact than overall, whereas SMEs were significantly less likely to say that the impact was not very serious.

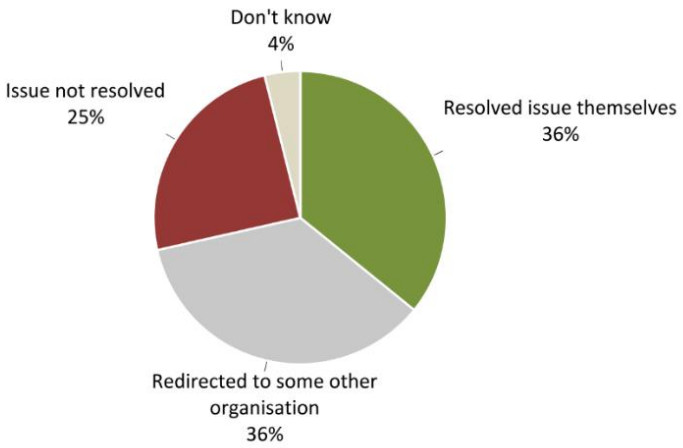
Figure 97: Did you report the problem to your retailer?



Base: Switchers and renegotiators who experienced problems (72)

4.95 Around 9 in 10 (89%) customers who experienced problems with their water supply in the last 12 months went on to report this problem to their retailer.

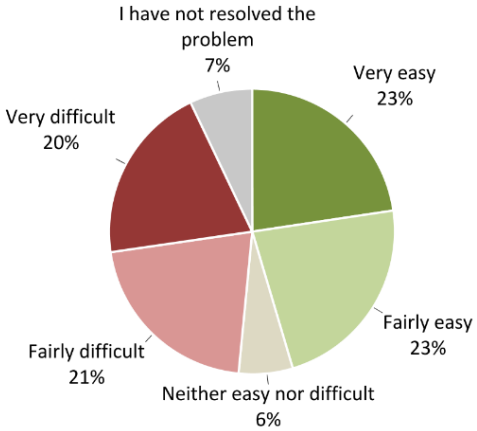
Figure 98: Were they able to resolve the problem, or did they redirect you to some other organisation?



Base: Switchers and renegotiators who reported problems to their retailer (60)

4.96 More than one third (36%) of customers who reported problems with their water supply had the issue solved by the retailer themselves; a similar proportion (36%) said that they were redirected to another organisation by their water retailer, while a quarter (25%) said that the issue was not yet resolved.

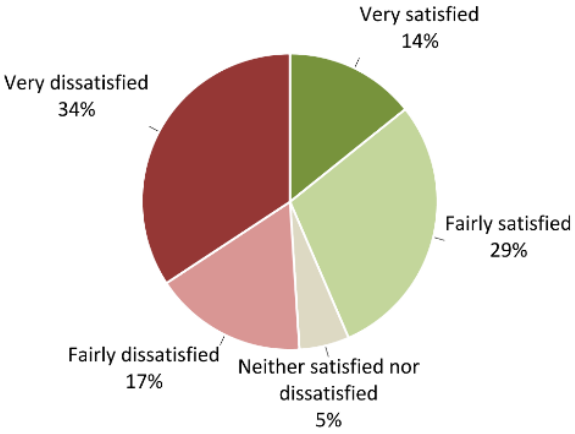
Figure 99: How easy or difficult was it to resolve the problem?



Base: Switchers and renegotiators who reported problems to their retailer (42)

4.97 Of the switchers and renegotiators who were asked about the ease with which it was dealt with, more than two fifths (45%) said that it was fairly or very easy, and around two fifths (41%) reported that it was difficult to resolve (most citing poor customer service as the reason for the difficulty).

Figure 100: Thinking only about the contact you had with your provider regarding the problems, how satisfied or dissatisfied were you with the contact overall?



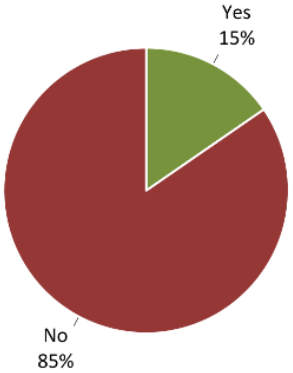
Base: Switchers and renegotiators who reported problems to their retailer (59)

4.98 Around half (51%) of switchers and renegotiators who contacted their retailer about problems said that they were dissatisfied with the contact; more than two fifths (43%) said that they were satisfied.

4.99 Customers were asked to give their overall views on the water market. The answers provided by switchers and negotiators are reported below.

Overall views on retailer customer service

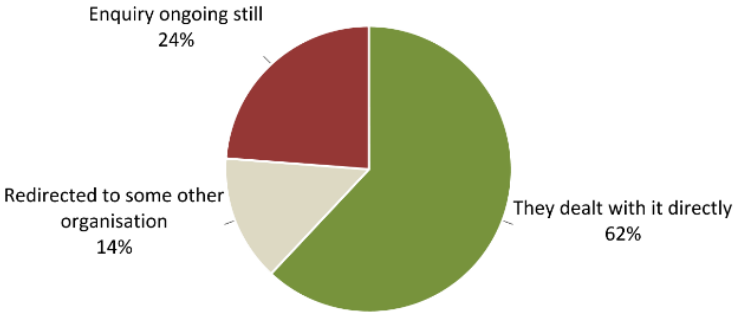
Figure 101: Have you contacted your provider or any other organisation with any enquiry about your water or waste water services over the last 12 months?



Base: All switchers and renegotiators (1,113)

4.100 Around one in six switchers and renegotiators had contacted their water retailer at some point in the last 12 months.

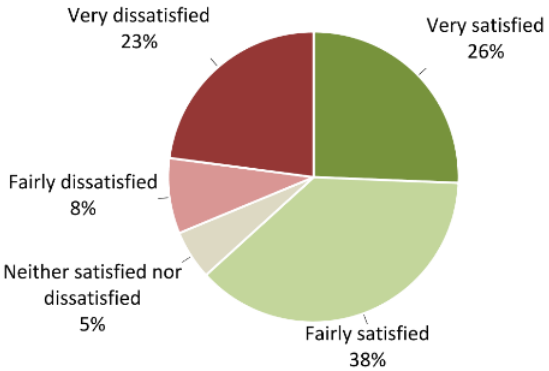
Figure 102: Were they able to deal with your enquiry, or did they redirect you to some other organisation?



Base: Switchers and renegotiators who contacted their retailer (146)

4.101 Of those switchers and renegotiators who had contacted their retailer, around three fifths (62%) reported that their retailer had dealt with their enquiry directly. About a quarter (24%) said that their enquiry was ongoing, while less than 1 in 6 (14%) reported being redirected to another organisation.

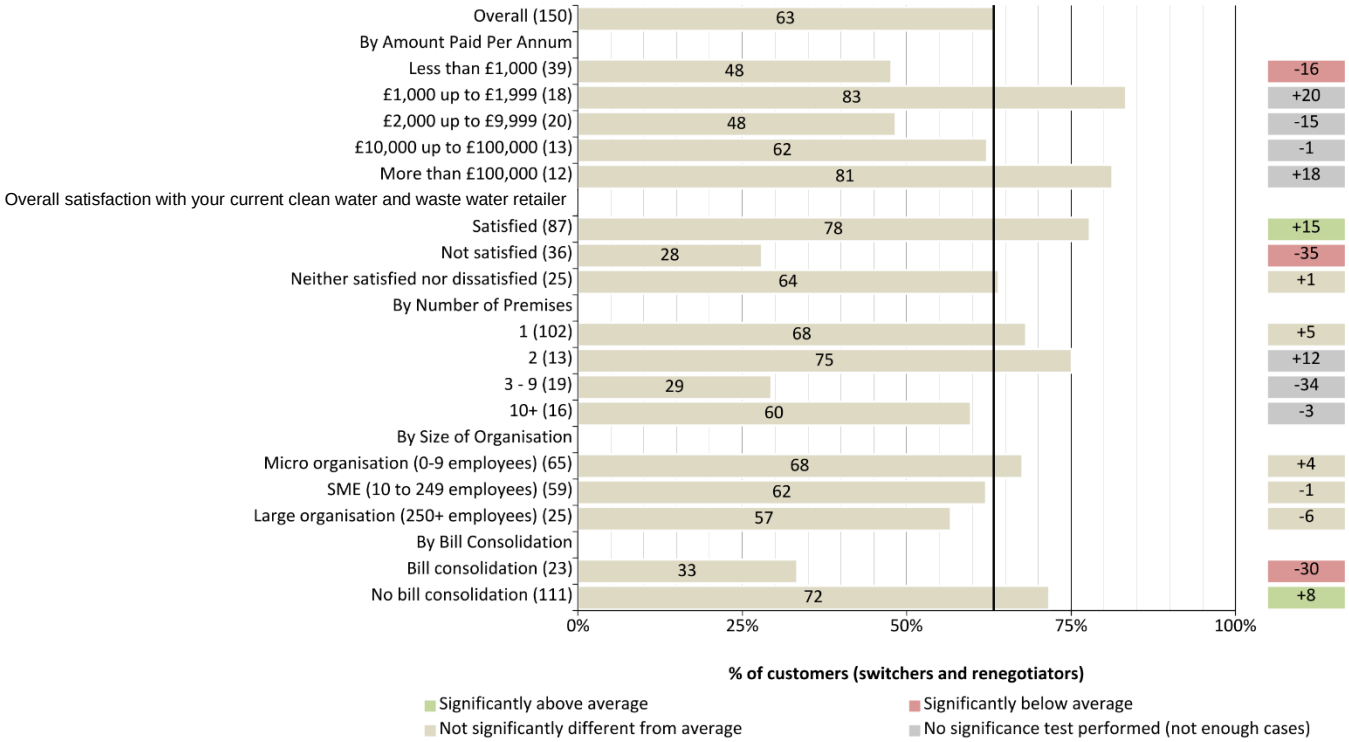
Figure 103: Thinking only about your most recent contact, how satisfied or dissatisfied were you with the contact overall?



Base: Switchers and renegotiators who contacted their retailer (150)

4.102 Nearly two thirds (63%) of customers said that they were satisfied with the contact that they had with their retailer, while around 3 in 10 (31%) said that they were dissatisfied with the contact overall.

Figure 104: Switchers and renegotiators who were satisfied with the contact they had with their retailer.



Base: Switchers and renegotiators who contacted their retailer (number of respondents shown in brackets)

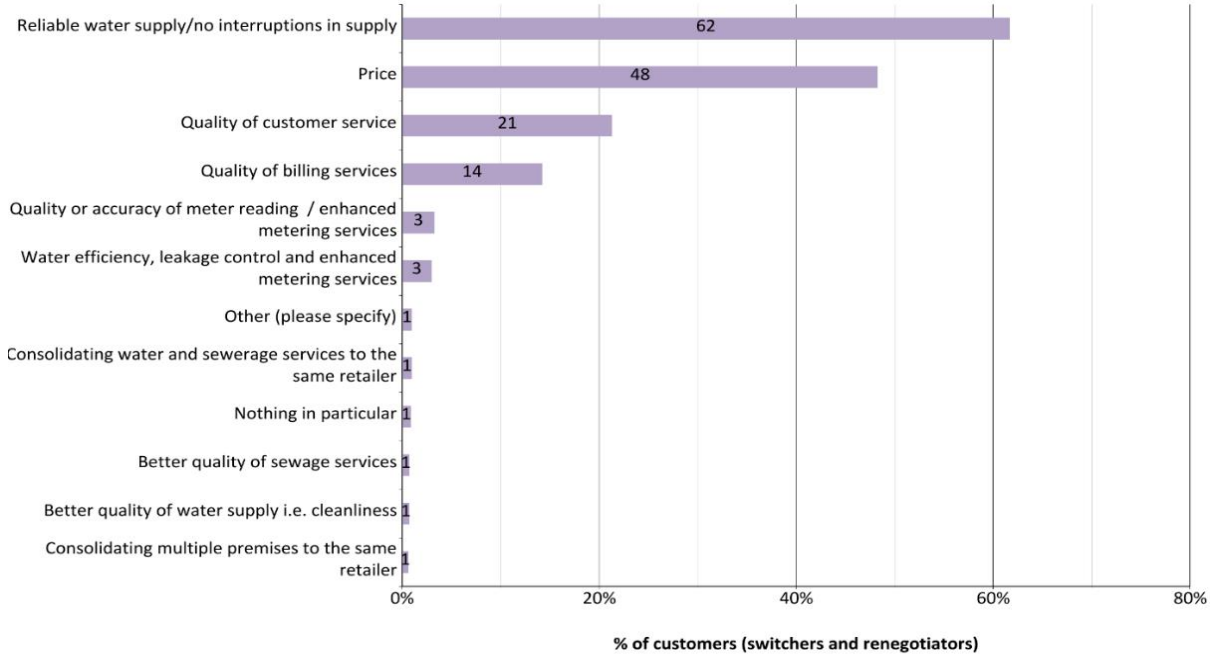
4.103 Switchers and renegotiators who had consolidated water bills as part of their new contract were significantly less likely to report being satisfied with the contact that they had with their retailers.

Overall customer views of the water market

The market as a whole

4.104 Switchers and renegotiators were asked to share the things that they, as customers, saw as most important about their water supply, as well as their feelings about the water market as a whole.

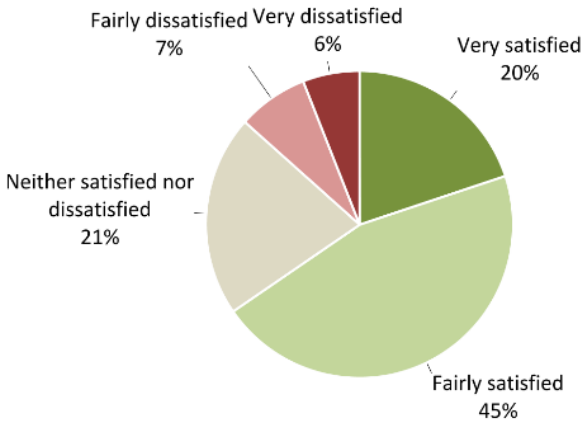
Figure 105: Overall, and taking everything into account, what is most important to you as a water customer?



Base: All switchers and renegotiators (1,114)

4.105 Three fifths (62%) of organisations who switched water retailers or renegotiated their deal with an existing one said that, overall, a reliable, uninterrupted water supply was an important priority as a customer. Almost half (48%) cited price as a significant factor, while around 1 in 5 (21%) said that good quality customer service was important to them. The quality of billing services was identified as important by more than 1 in 6 (14%) of customers who switched or renegotiated, and accurate meter readings and enhanced metering, efficiency and leakage control services were also mentioned, among others.

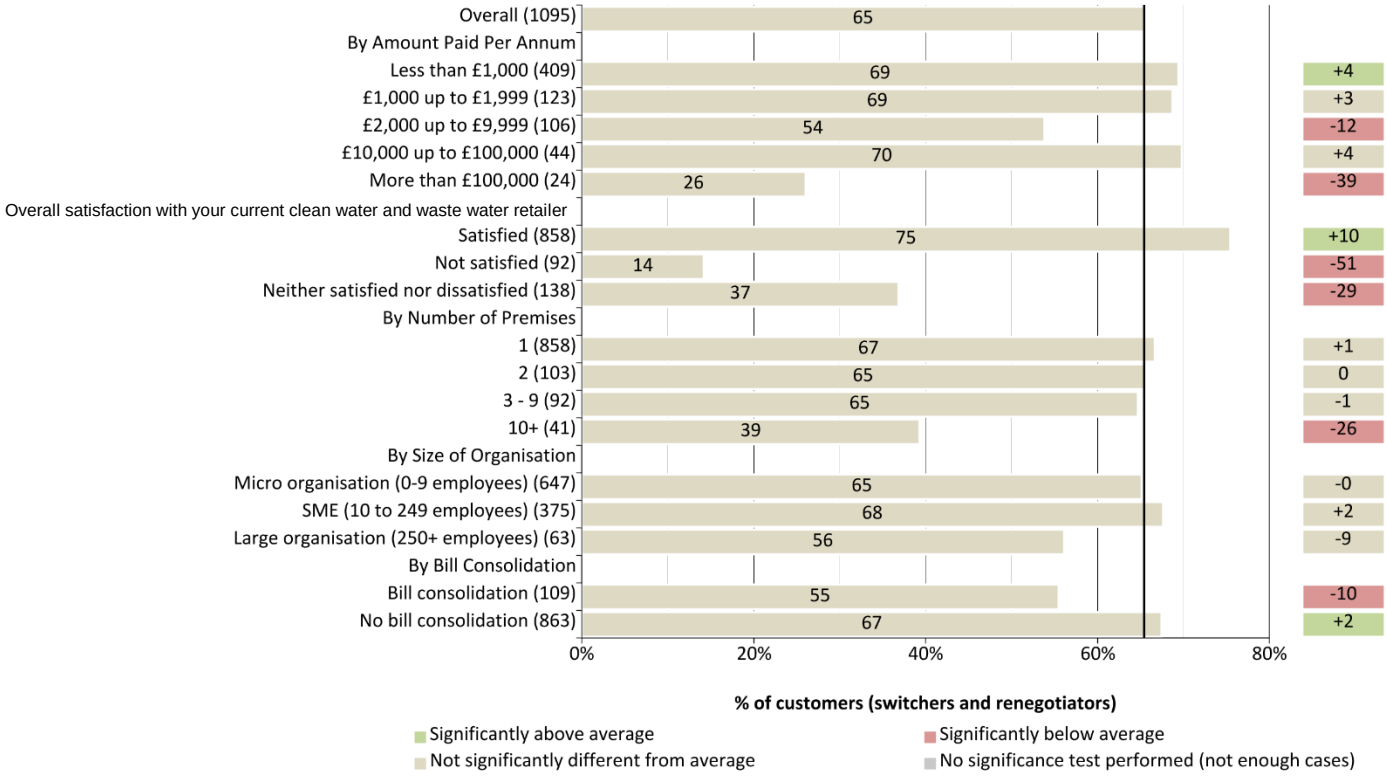
Figure 106: Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?



Base: All switchers and renegotiators (1,095)

4.106 Around two fifths (65%) of switchers and renegotiators reported being satisfied with the water market as a whole, and around 1 in 8 (13%) said that they were dissatisfied overall.

Figure 107: Customer who were satisfied with the water market as a whole.



Base: All switchers and renegotiators (number of respondents shown in brackets)

4.107 Customers who expressed satisfaction with their own water retailer were significantly more likely than other switchers and renegotiators to be satisfied with the water market as a whole, while those who were dissatisfied or had neutral feelings about their own retailer were significantly less likely to express satisfaction with the water market overall.

4.108 Customers with an annual bill of £1000 or less were significantly more likely than switchers and renegotiators overall to be satisfied with the water market, while those spending in excess of £100,000 per annum were significantly less likely to be satisfied. Customers who had more than 10 premises, or who had consolidated billing, were also significantly less likely to be satisfied with the water market as a whole.

Table of Figures

Annex – Questionnaire scripts

Wave 1 – Survey of all non-household customers

Screening questions

… S1 Is this business run from a business premises or from somewhere else (e.g. a home residence or a mobile business)?
Business premises
No fixed business premises

If No fixed business… S2 Just to clarify, so your organisation DOESN'T have ANY OTHER main premises?
No other main business premises
There are other main business premises other than my/someone else's home

… S3 Can I check whether your organisation is responsible for making decisions about and paying for water utilities, or whether someone other than the organisation, such as the landlord or management company, is responsible for this?
Organisation makes its own decisions about utilities
Decisions about utilities are made by a third party

… S4A How many premises does your organisation operate from?
Individual number is recorded

… S5 Does your organisation receive its clean water *and* waste water/sewerage services from the same company?
Yes – receive both from the same company
No – they are supplied by different companies

Ask all… S6a What is your organisation's FULL postcode?
Free text

Awareness

B1 I'm going to start by asking a few questions about different utilities…
In general, do you think it is possible or not possible for organisations in England to switch their [An answer for each of the following] …

a. **Telephone and internet provider**
b. **Electricity and gas retailer**
c. **Water retailer**

Yes – possible to switch
No – not possible to switch

… B2 Since April 2017, organisations have been able to change the company providing their water and waste water retail services or potentially move to a better deal with their existing retailer. Prior to this survey were you aware of this?
Yes – aware
No – not aware

If the customer is aware that it is possible for organisations in England to switch their telephone and internet provider, and their electricity and gas retailer… B3a Has your organisation switched provider for other utilities such as gas or electricity, telephone or internet provider?
Yes – in the last 12 months
Yes – longer ago
No

Satisfaction

All customers… D1 Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

If fairly dissatisfied or very dissatisfied… 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)
Metering issues (e.g. incorrect or infrequent readings)
Other (please specify)

If very satisfied or fairly satisfied… D4 Are there any particular reasons why you are satisfied? If so, what are they?
No/no real reason
Price (cheap/not expensive)
Good customer service
Experienced no/few problems
Other

Behaviour in the market

If aware of market opening… E1 Since April 2017, have you switched your water retailer?
Yes – in the last 12 months
Yes – longer ago
No

If Yes… E2 Just to double check that your organisation actively chose to switch retailer rather than being automatically transferred when the market opened?

If customer definitely switched retailer (not switched automatically by choice)… E4 Have you switched more than once?
No – just once
Yes – twice
Yes – more than twice

If aware of the market…E5 Since April 2017 it is now also possible for organisations to renegotiate their contract with their existing retailer. Renegotiation might include securing incentives like a lower tariff, additional services or one-off offers like cashback.
Have you managed to successfully renegotiate with your existing retailer?
Yes – in the last 12 months
Yes – longer ago
No

If Yes… E6 Have you renegotiated more than once?
No – just once
Yes – twice
Yes – more than twice

If the customer has both switched and renegotiated…E7 Which did you do most recently: Switch retailer or successfully renegotiate?
Switched
Renegotiated

Switching

If just switched/switched most recently…F2a What is the total length of your new contract?
Less than a year
A year but less than 2 years
2 years but less than 3 years
3 years or more
Rolling/no fixed length

If just switched/switched most recently…F1 How many, if any, different retailers did you receive price quotations from prior to switching?
Write in number

If just switched/switched most recently… F3 Which of the following best describes your experience of agreeing a price with your new retailer?
Your new retailer offered a price on a take it or leave it basis
You negotiated the price with the new retailer
You controlled the process by running a formal tender process

If just switched/switched most recently…F4 Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal?
Yes – I approached my previous retailer
Yes – my previous retailer approached me before I signed up with my new retailer
Yes – my previous retailer approached me after I had signed up with my new retailer
No – I didn't have any contact with my previous retailer regarding a better offer to stay with them

If Yes to F4… F5 What, if anything, did your previous retailer offer you to encourage you to stay? [Multi]
Nothing
Cheaper tariff
Additional services
Other (please specify)

If just switched/switched most recently… F6 How did you *arrange* the switch?
Through a retailer website or direct contact with retailer
Through a broker or consultant
Other (please specify)

If just switched/switched most recently… F7 Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?
Very easy
Fairly easy
Neither easy nor difficult

Fairly difficult
Very difficult

If the process of switching was difficult…F8 Why?
Freetext (record word for word)

If just switched or switched recently…F9 How satisfied or dissatisfied were you with the time it took for the switch to take place?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

If just switched/switched most recently…F10a Why did you start looking into switching? [Multi]
Lower price/bill
To get higher quality service (e.g. more tailored billing)
To get better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just switched/switched most recently…F11a When you switched, did your new retailer commit to providing any specific benefits? What were these? [Multi]
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just switched/switched most recently…F12aWhat benefits, if any, did you actually get from switching?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services

Other
Worse off

If not 'nothing' or 'worse off'…F13a Did the benefits meet your expectations?
Yes – met expectations
Yes – exceeded expectations
No – didn't meet expectations
Not yet / too early to tell
Worse off

If 'Did not meet expectations'…F14a You say the benefits didn't meet your expectations. Can you say why this was? [Free text]
Freetext

If F13a response is 'worse off' or F12a response is 'worse off'… F15a You say that you are worse off as a result of switching. Can you say why this is? [Free text]
Freetext

If just switched/switched most recently…L5a Can you tell me approximately how much your organisation pays for your water and wastewater services per year, across all premises?
Less than £500
£500 up to £999
£1,000 up to £1,999
£2,000 up to £9,999
£10,000 up to £100,000
More than £100,000

If just switched/switched most recently…F16a 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?
No reduction (0%)
Write in %
Write in £ - ANNUAL FIGURE
Too early to tell

If Just switched / switched most recently…F17a As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of switching?
Yes
No

If Yes to F17a and there has been a reduction… F18a Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services?
Entirely from a lower tariff
Mostly from a lower tariff
Equally from a lower tariff and water efficiency/leak detection services
Mostly from water efficiency/leak detection services
Entirely from water efficiency/leak detection services

If just switched /switched most recently…F19a 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?
Better
About the same
Worse
Too early to tell

If just switched/switched most recently, has more than one premises and F12a is not bill consolidation across multiple premises…F20 As a result of switching, have you consolidated your water bill across multiple premises into a single bill?
Yes – consolidated across premises
No – did not consolidate across premises

If consolidated bills across multiple premises…F21 How many premises that were previously billed separately have now been consolidated into a single bill?
Write in number

If just switched/switched most recently and customer has not had Bill consolidation across multiple utilities…F22 As a result of switching, have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas into a single bill?
Yes – consolidated with other utilities
No – did not consolidate with other utilities

If just switched/switched most recently…F24a Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching?
Time spent has increased
Time spent has reduced
Too early to tell

If time spent has increased or reduced…F24b What is your billing cycle period currently is?
Monthly
Quarterly
Annually
Other - Freetext

If time spent has increased or reduced…F24c …And how much time do you think your organisation has saved / (lost) each [month / quarter / year]?
Write in and capture whether this is minutes, hours, days, weeks etc

If just switched/switched most recently…F25a Overall, taking the whole experience of switching into account, do you agree or disagree that it was worthwhile for you to switch?

Strongly agree
Tend to agree
Neither agree nor disagree
Tend to disagree
Strongly disagree

If switched and renegotiated, switched most recently… F26a You mentioned earlier that you both renegotiated and switched. Why did you decide to switch after having renegotiated?
Freetext

Renegotiating

If just renegotiated/renegotiated most recently…F2b What is the total length of your new or renewed contract?
Less than a year
A year but less than 2 years
2 years but less than 3 years
3 years or more
Rolling/no fixed length

If just renegotiated/renegotiated most recently…G1 Which of the following best describes your experience of getting a new or better deal with your existing retailer?
Retailer offered a price or discount on a take it or leave it basis
You negotiated the price
You took up a different offer e.g. cash back or additional services

If just renegotiated/renegotiated most recently…G2 Before you renegotiated, did explore what else was on offer?
Yes
No

If just renegotiated/renegotiated most recently and the customer explored what else was on offer… G3 How many, if any, different retailers did you receive price quotations from prior to renegotiating or getting a new deal?
Written number

If just renegotiated/renegotiated most recently…F10b Why did you start looking into renegotiating?
Lower price/bill
To get higher quality service (e.g. more tailored billing)
To get better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just renegotiated/renegotiated most recently…F11b When you renegotiated, did your retailer commit to providing any specific benefits? What were these?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just renegotiated/renegotiated most recently…F12b What benefits, if any, did you actually get from renegotiating?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services

Leakage control services
Enhanced metering services
Other
Worse off

If F12b is not equal to 'nothing' and not equal to 'worse off'…F13b Did the benefits meet your expectations?
Yes – met expectations
Yes – exceeded expectations
No – didn't meet expectations
Not yet / too early to tell
Worse off

If no, didn't meet expectations…F14b You say the benefits didn't meet your expectations. Can you say why this was?
Freetext

If F13b is 'worse off' **or F12b is 'worse off'…F15b You say that you are worse off as a result of renegotiating. Can you say why this is?**
Freetext

If just renegotiated or renegotiated most recently…L5b Can you tell me approximately how much your organisation pays for your water and waste water services per year, across all premises?
Less than £500
£500 up to £999
£1,000 up to £1,999
£2,000 up to £9,999
£10,000 up to £100,000
More than £100,000

If just renegotiated/renegotiated most recently…F16b In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating, if at all?
No reduction (0%)
Write in %
Write in £ - ANNUAL FIGURE
Too early to tell

If just renegotiated / renegotiated most recently…F17b As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of renegotiating?
Yes
No

If yes and there was a reduction in their bills …F18b Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services?
Entirely from a lower tariff
Mostly from a lower tariff
Equally from a lower tariff and water efficiency/leak detection services
Mostly from water efficiency/leak detection services
Entirely from water efficiency/leak detection services

If just renegotiated/renegotiated most recently…F19b Is the quality of retail services like billing and meter-reading better, worse, or about the same as before you renegotiated?
Better
About the same

Worse
Too early to tell

If just renegotiated/renegotiated most recently…F25b Overall, taking the whole experience of renegotiating into account, do you agree or disagree that it was worthwhile for you to renegotiate a better deal with your existing retailer?
Strongly agree
Tend to agree
Neither agree nor disagree
Tend to disagree
Strongly disagree

If switched and renegotiated, but renegotiated most recently…F26b You mentioned earlier that you both renegotiated and switched. Why did you decide to renegotiate after having switched?
Freetext

Aware non-switchers and non-renegotiators

If aware and not switched/not successfully renegotiated… H1 Which of the following scenarios best applies to your organisation?
You are considering switching providers or renegotiating with your existing provider AND have taken steps to search for and compare different providers **(Continue to I1-6, then I9).**
You plan to do this in the future **(Continue to I7 then I11).**
You tried to switch or renegotiate but found you couldn't **(Continue to I1-6, then to I9).**
You considered switching or renegotiating but decided not to **(Continue to I1-6, then to I8).**
You have not considered switching or renegotiating **(Continue to I7).**

Searching and Comparing

If either switched, explored other offers before renegotiated *or* considering switching/renegotiating and have taken steps, tried but couldn't or decided not… I1 Which of the following, if any, 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)
I didn't search (none)

If 'price comparison website'… I2 Did you use a price comparison website which listed quotes from different retailers OR one where you put in details, such as water usage, for a tailored quote, or both?
Listed quotes from different retailers
Put in details for a tailored quote
Other (please specify)

If customer used any method of searching for information…I3 How easy or difficult was it for you to find the information you felt like you needed to make an informed choice?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If the customer found it difficult to find the information they needed… I4 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
I don't know the price I'm paying now
Other (specify)

If customer used any method of searching for information…I5 How easy or difficult was it to compare different retailers?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If difficult…I6 Why was this difficult?
Prices weren't clear/were hard to compare
Information wasn't consistent
Couldn't get enough quotes to compare/quotes weren't of sufficient quality
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 plan to switch/renegotiate in future, or have not considered to…I7 Why have you not yet considered switching retailer or renegotiating with you existing retailer?
Service is good/happy with current retailer/provision
Don't know any other retailers/no alternative
Don't know how to switch
Too much effort to switch
No point in switching
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
I'm not able to switch
Other (please specify)

If considering switching renegotiating, tried to switch or renegotiate but couldn't, considered but decided not to…I9 Why did you start looking into switching or renegotiating?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (eg. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across utilities
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services

Enhanced metering services
Other (please specify)

If Considered but decided not to… I8 Why did you decide not to switch retailers or renegotiate with your existing retailer after considering it?
Savings were minimal/didn't save enough money
No way to compare services/prices
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 tried to switch or renegotiate and couldn't…I10 Why was it you couldn't switch or successfully renegotiate?
Freetext

If aware of possibility to switch or renegotiate water… I11 Since the water market was opened to competition in April 2017, have you noticed any positive or negative changes in the water retail services you receive?
Yes – positive changes
Yes – negative changes
No – no changes

If yes, positive changes…I12 What are the positive changes?
Freetext

If yes, negative changes… I13 What are the negative changes?
Freetext (record word for word)

ALL RESPONDENTS…I14 percentage terms, what level of annual water bill reduction would encourage you to switch or consider switching retailer?
Write in %
Would not switch retailer due to water bill reduction (not read out)
Would not switch at all (not read out)

If not aware or if not considered/currently considering switching or renegotiating… I15
No, nothing
Freetext

Problems and Complaints

Ask all… J1 Have you had any problems with clean or waste water services over the last 12 months?
Yes
No

If Yes… J2 what were they? [Multi]
Problems with customer service (e.g. billing)
On your premises- Problems with pipes, leaks, supply interruptions
Off your premises - Problems with pipes, leaks, supply interruptions (e.g. in the street/public road)

Problems with quality of water (e.g. cloudy water)
Problems with meter reading (e.g. can't read meter/supplier doesn't read meter regularly)
Other - Freetext

If customer has had problems with their water services… J3 How serious an impact did these problems have on your business?
Very serious impact
Fairly serious impact
Not a very serious impact
No impact at all

If customer has had problems with their water services… J4 Did you report the problem to your provider?
Yes
No

If Yes, they reported the problem…J5 Were you able to resolve the problem, or did they redirect you to some other organisation?
Resolved issue themselves
Redirected to some other organisation
Issue not resolved

If yes, they've experienced problems, or if they resolved the issue themselves or were redirected to another organisation… J6 How easy or difficult was it to resolve the problem?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If the customer found it fairly difficult / very difficult… J7 Why was it difficult to get the problem resolved?
Freetext

If they reported the problem to their provider…J8 Thinking only about the contact you had about this problem, how satisfied or dissatisfied were you with the contact overall?
Very satisfied
Fairly satisfied

Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

All customers… J11 Other than to report problems, have you contacted your provider or any other organisation with any enquiry about your water or waste water services over the last 12 months?
Yes
No

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J12 What was your most recent contact about? [Multi]
Billing enquiry
To report a leak
Sewerage problem
Loss of supply after icy weather
Issue with water meter

Issue with meter reading
No supply / supply issue
Water quality
Water pressure
To make a complaint
To change to/ask for a water meter
To find out about switching
To ask about other services such as trade effluent permits/ developer services

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J13 Were they able to deal with your enquiry, or did they redirect you to some other organisation?
They dealt with it directly
Redirected to some other organisation
Enquiry ongoing still

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J14 Thinking only about your most recent contact, how satisfied or dissatisfied were you with the contact overall?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

Summing up

Ask all…K1 Overall, and taking everything into account, what is most important to you as a water customer? [Multi]
Reliable water supply/no interruptions in supply
Price
Online account management services
Quality of customer service
Quality or accuracy of meter reading / enhanced metering services
Consolidating water and sewerage services to the same retailer
Consolidating multiple premises to the same retailer [for multi-site customers only]
Consolidating different utilities (including water) to the same supplier
Water efficiency, leakage control
Reputation of the retailer
Other (specify)
Nothing in particular

Ask all… K2 Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

Organisation Demographics

Ask all… L1 Including yourself, how many people work for your organisation, across all of your premises?

1
2-4
5-9
10-19
20-49
50-99
100-249
250+

If definitive number… L2 Is your organisation legally classed as a 'Sole Trader'?

Yes
No

If number of premises is just 1… L3 Are you on a metered supply?

Yes
No

If number of premises is great than 1… L3b Are any of your organisation's premises on a metered supply?

Yes – all premises
Yes – some premises
No – none

If not just switched/switched most recently/not just renegotiated or renegotiated most recently… L5c Can you tell me approximately how much your organisation pays for your water and waste water services per year, across all premises?

Freetext
Less than £500
£500 up to £999
£1,000 up to £1,999
£2,000 up to £9,999
£10,000 up to £100,000
More than £100,000

Ask all… L4 Approximately what proportion of your organisation's annual running costs go on water and waste water bills?

0-5%
6-10%
11%+

Wave 2 – Survey of all Market Switchers/Renegotiators

Screening questions

… S4B How many premises does your organisation operate from?
Number recorded

If more than 1 premises… S8 Does your organisation have any premises in Scotland?
Yes
No

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

Ask all… S6B What is your organisation's FULL postcode?
Free text

Confirming switch

Ask of MOSL customers only… C1 Can I just confirm that your organisation has switched clean or waste water retailer?
Yes – In the last 12 months
Yes – Longer ago
No

If customer has confirmed they switched retailers… C3 Have you switched more than once?
No – just the once
Yes – twice
Yes – more than twice

Ask all switchers/renegotiators… C4 As well as having switched, have you managed to renegotiate with your retailer?
Yes – in the last 12 months?
Yes – longer ago
No

If customer has ever switched… C5 Have you renegotiated more than once?
No – just once
Yes – twice
Yes – more than twice

If both switched *and* renegotiated customers… C6 Which did you do most recently: Switch or successfully renegotiate?
Switched
Renegotiated

Ask all customers… B3b Has your organisation switched provider for other utilities such as gas or electricity, telephone or internet provider?
Yes – in last the 12 months
Yes – longer ago
No

Satisfaction

All customers… D1 Overall, how satisfied or dissatisfied are you with your current clean water and waste water retailer(s)?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

If fairly dissatisfied or very dissatisfied… 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)
Metering issues (e.g. incorrect or infrequent readings)Other (please specify)

If very satisfied or fairly satisfied… D4 Are there any particular reasons why you are satisfied? If so, what are they?
No/no real reason
Price (cheap/not expensive)
Good customer service
Experienced no/few problems
Other

Switching

If just switched/switched most recently… F2a What is the total length of your new contract?
Less than a year
A year but less than 2 years
2 years but less than 3 years
3 years or more
Rolling/no fixed length

If just switched/switched most recently… F1 How many, if any, different retailers did you receive price quotations from prior to switching?
Write in number

If just switched/switched most recently… F3 Which of the following best describes your experience of agreeing a price with your new retailer?
Your new retailer offered a price on a take it or leave it basis
You negotiated the price with the new retailer
You controlled the process by running a formal tender process

If just switched/switched most recently… F4 Before you signed up with your new retailer, did you have contact with your previous retailer regarding the possibility of a better deal?
Yes – I approached my previous retailer
Yes – my previous retailer approached me before I signed up with my new retailer
Yes – my previous retailer approached me after I had signed up with my new retailer
No – I didn't have any contact with my previous retailer regarding a better offer to stay with them

If Yes to F4… F5 What, if anything, did your previous retailer offer you to encourage you to stay?[Multi]
Nothing
Cheaper tariff
Additional services
Other (please specify)

If just switched/switched most recently… F6 How did you *arrange* the switch?
Through a retailer website or direct contact with retailer
Through a broker or consultant
Other (please specify)

If just switched/switched most recently… F7 Once you had chosen the retailer you wanted to switch to, how easy or difficult did you find the process of switching retailer?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficultVery difficult

If the process of switching was difficult… F8 Why?
Freetext (record word for word)

If just switched or switched recently… F9 How satisfied or dissatisfied were you with the time it took for the switch to take place?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

If just switched/switched most recently… F10a Why did you start looking into switching? [Multi]
Lower price/bill
To get higher quality service (e.g. more tailored billing)
To get better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just switched/switched most recently… F11a When you switched, did your new retailer commit to providing any specific benefits? What were these? [Multi]
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services

Enhanced metering services
Other

If just switched/switched most recently… F12aWhat benefits, if any, did you actually get from switching?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other
Worse off

If not 'nothing' or 'worse off'… F13a Did the benefits meet your expectations?
Yes – met expectations
Yes – exceeded expectations
No – didn't meet expectations
Not yet / too early to tell
Worse off

If 'Did not meet expectations'… F14a You say the benefits didn't meet your expectations. Can you say why this was?
Freetext

If F13a response is 'worse off' or F12a response is 'worse off'… F15a You say that you are worse off as a result of switching. Can you say why this is?
Freetext

If just switched/switched most recently… L5a Can you tell me approximately how much your organisation pays for your water and wastewater services per year, across all premises?
Less than £500
£500 up to £999
£1,000 up to £1,999
£2,000 up to £9,999
£10,000 up to £100,000
More than £100,000

If just switched/switched most recently… F16a 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?
No reduction (0%)
Write in %
Write in £ - ANNUAL FIGURE
Too early to tell

If Just switched / switched most recently… F17a As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of switching?
Yes
No

If Yes to F17a and there has been a reduction… F18a Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services?
Entirely from a lower tariff
Mostly from a lower tariff
Equally from a lower tariff and water efficiency/leak detection services
Mostly from water efficiency/leak detection services
Entirely from water efficiency/leak detection services

If just switched /switched most recently… F19a 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?
Better
About the same
Worse
Too early to tell

If just switched/switched most recently, has more than one premises and F12a is not bill consolidation across multiple premises… F20 As a result of switching, have you consolidated your water bill across multiple premises into a single bill?
Yes – consolidated across premises
No – did not consolidate across premises

If consolidated bills across multiple premises… F21 How many premises that were previously billed separately have now been consolidated into a single bill?
Number written

If just switched/switched most recently and customer has not had Bill consolidation across multiple utilities… F22 As a result of switching, have you consolidated your water retail services with any of your other utilities, such as electric, telephone or gas into a single bill?
Yes – consolidated with other utilities
No – did not consolidate with other utilities

If just switched/switched most recently… F24a Has the amount of time your organisation spends dealing with your water bills each billing cycle increased, reduced or stayed the same since switching?
Time spent has increased
Time spent has reduced
Too early to tell

If time spent has increased or reduced… F24b What is your billing cycle period currently is?
Monthly
Quarterly
Annually
Other

If time spent has increased or reduced… F24c How much time do you think your organisation has saved / (lost) each [month / quarter / year]?
Write in and capture whether this is minutes, hours, days, weeks etc.
Freetext

If just switched/switched most recently… F25a Overall, taking the whole experience of switching into account, do you agree or disagree that it was worthwhile for you to switch?
Strongly agree
Tend to agree
Neither agree nor disagree
Tend to disagree

Strongly disagree

If switched and renegotiated, switched most recently… F26a You mentioned earlier that you both renegotiated and switched. Why did you decide to switch after having renegotiated?
Freetext

Renegotiating

If just renegotiated/renegotiated most recently… F2b What is the total length of your new or renewed contract?
Less than a year
A year but less than 2 years
2 years but less than 3 years
3 years or more
Rolling/no fixed length

If just renegotiated/renegotiated most recently… G1 Which of the following best describes your experience of getting a new or better deal with your existing retailer?
Retailer offered a price or discount on a take it or leave it basis
You negotiated the price
You took up a different offer e.g. cash back or additional services

If just renegotiated/renegotiated most recently… G2 Before you renegotiated, did explore what else was on offer?
Yes
No

If just renegotiated/renegotiated most recently and the customer explored what else was on offer… G3 How many, if any, different retailers did you receive price quotations from prior to renegotiating or getting a new deal?
Written number

If just renegotiated/renegotiated most recently… F10b Why did you start looking into renegotiating?
Lower price/bill
To get higher quality service (e.g. more tailored billing)
To get better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just renegotiated/renegotiated most recently… F11b When you renegotiated, did your retailer commit to providing any specific benefits? What were these?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback

Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If just renegotiated/renegotiated most recently… F12b What benefits, if any, did you actually get from renegotiating?
Lower price/bill
Higher quality service (e.g. more tailored billing)
Better customer service (e.g. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across multiple utilities (e.g. gas, telecoms or electricity billed with water)
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other
Worse off

If F12b is not equal to 'nothing' and not equal to 'worse off'… F13b Did the benefits meet your expectations?
Yes – met expectations
Yes – exceeded expectations
No – didn't meet expectations
Not yet / too early to tell
Worse off

If no, didn't meet expectations… F14b You say the benefits didn't meet your expectations. Can you say why this was?
Freetext

If F13b is 'worse off' or F12b is 'worse off'… F15b You say that you are worse off as a result of renegotiating. Can you say why this is?
Freetext (record word for word)

If just renegotiated or renegotiated most recently… L5b Can you tell me approximately how much your organisation pays for your water and waste water services per year, across all premises?
Less than £500
£500 up to £999
£1,000 up to £1,999
£2,000 up to £9,999
£10,000 up to £100,000
More than £100,000

If just renegotiated/renegotiated most recently… F16b In percentage terms, roughly how much have your water bills reduced by, or do you expect them to reduce by, as a result of renegotiating, if at all?
No reduction (0%)
Write in %
Write in £ - ANNUAL FIGURE
Too early to tell

If just renegotiated / renegotiated most recently… F17b As well as offering lower tariffs, retailers can also offer services to make your use of water more efficient and to detect leaks better. Do you now receive any new water efficiency or leak detection services as a result of renegotiating?
Yes
No

If yes and there was a reduction in their bills… F18b Do you think your savings have come mostly from a lower tariff or from water efficiency and leak detection services?
Entirely from a lower tariff
Mostly from a lower tariff
Equally from a lower tariff and water efficiency/leak detection services
Mostly from water efficiency/leak detection services
Entirely from water efficiency/leak detection services

If just renegotiated/renegotiated most recently… F19b Is the quality of retail services like billing and meter-reading better, worse, or about the same as before you renegotiated?
Better
About the same
Worse
Too early to tell

If just renegotiated/renegotiated most recently… F25b Overall, taking the whole experience of renegotiating into account, do you agree or disagree that it was worthwhile for you to renegotiate a better deal with your existing retailer?
Strongly agree
Tend to agree
Neither agree nor disagree
Tend to disagree
Strongly disagree

If switched and renegotiated, but renegotiated most recently…F26b You mentioned earlier that you both renegotiated and switched. Why did you decide to renegotiate after having switched?
Freetext

Searching and Comparing

If either switched, explored other offers before renegotiated *or* considering switching/renegotiating and have taken steps, tried but couldn't or decided not… I1 Which of the following, if any, 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
I didn't search (none)

If 'price comparison website'… I2 Did you use a price comparison website which listed quotes from different retailers OR one where you put in details, such as water usage, for a tailored quote, or both?
Listed quotes from different retailers
Put in details for a tailored quote
Other

If customer used any method of searching for information… I3 How easy or difficult was it for you to find the information you felt like you needed to make an informed choice?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If the customer found it difficult to find the information they needed… I4 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
I don't know the price I'm paying now
Other (specify)

If customer used any method of searching for information… I5 How easy or difficult was it to compare different retailers?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If difficult… I6 Why was this difficult?
Prices weren't clear/were hard to compare
Information wasn't consistent
Couldn't get enough quotes to compare/quotes weren't of sufficient quality
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 plan to switch/renegotiate in future, or have not considered to… I7 Why have you not yet considered switching retailer or renegotiating with you existing retailer?
Service is good/happy with current retailer/provision
Don't know any other retailers/no alternative
Don't know how to switch
Too much effort to switch
No point in switching
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
I'm not able to switch
Other

If considering switching renegotiating, tried to switch or renegotiate but couldn't, considered but decided not to… I9 Why did you start looking into switching or renegotiating?
Lower price/bill
Higher quality service (e.g. more tailored billing)

Better customer service (eg. when I contact them)
Bill consolidation for water and waste water
Bill consolidation across multiple premises
Bill consolidation across utilities
Incentives/cashback
Online account management services
Water efficiency services
Leakage control services
Enhanced metering services
Other

If Considered but decided not to… I8 Why did you decide not to switch retailers or renegotiate with your existing retailer after considering it?
Savings were minimal/didn't save enough money
No way to compare services/prices
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

If tried to switch or renegotiate and couldn't… I10 Why was it you couldn't switch or successfully renegotiate?
Freetext

If aware of possibility to switch or renegotiate water… I11 Since the water market was opened to competition in April 2017, have you noticed any positive or negative changes in the water retail services you receive?
Yes – positive changes
Yes – negative changes
No – no changes

If yes, positive changes… I12 What are the positive changes?
Freetext (record word for word)

If yes, negative changes… I13 What are the negative changes?
Freetext (record word for word)

Ask all customers… I14 percentage terms, what level of annual water bill reduction would encourage you to switch or consider switching retailer?
Write in %
Freetext
(Would not switch retailer due to water bill reduction)
(Would not switch at all)

If not aware or if not considered/currently considering switching or renegotiating… I15
No, nothing
Freetext

Problems and Complaints

Ask all… J1 Have you had any problems with clean or waste water services over the last 12 months?
Yes
No

If Yes… J2 what were they? [Multi]
Problems with customer service (e.g. billing)
On your premises- Problems with pipes, leaks, supply interruptions
Off your premises - Problems with pipes, leaks, supply interruptions (e.g. in the street/public road)
Problems with quality of water (e.g. cloudy water)
Problems with meter reading (e.g. can't read meter/supplier doesn't read meter regularly)
Other - Freetext (record word for word)

If customer has had problems with their water services… J3 How serious an impact did these problems have on your business?
Very serious impact
Fairly serious impact
Not a very serious impact
No impact at all

If customer has had problems with their water services… J4 Did you report the problem to your provider?
Yes
No

If Yes, they reported the problem… J5 Were you able to resolve the problem, or did they redirect you to some other organisation?
Resolved issue themselves
Redirected to some other organisation
Issue not resolved

If yes, they've experienced problems, or if they resolved the issue themselves or were redirected to another organisation… J6 How easy or difficult was it to resolve the problem?
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult

If the customer found it fairly difficult / very difficult… J7 Why was it difficult to get the problem resolved?
Freetext

If they reported the problem to their provider… J8 Thinking only about the contact you had about this problem, how satisfied or dissatisfied were you with the contact overall?
Very satisfied
Fairly satisfied

Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

All customers… J11 Other than to report problems, have you contacted your provider or any other organisation with any enquiry about your water or waste water services over the last 12 months?

Yes
No

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J12 What was your most recent contact about? [Multi]
Billing enquiry
To report a leak
Sewerage problem
Loss of supply after icy weather
Issue with water meter
Issue with meter reading
No supply / supply issue
Water quality
Water pressure
To make a complaint
To change to/ask for a water meter
To find out about switching
To ask about other services such as trade effluent permits/ developer services

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J13 Were they able to deal with your enquiry, or did they redirect you to some other organisation?
They dealt with it directly
Redirected to some other organisation
Enquiry ongoing still

If the customer has contacted their retailer or another organisation with any enquiry in the last 12 months… J14 Thinking only about your most recent contact, how satisfied or dissatisfied were you with the contact overall?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

Summing up

Ask all… K1 Overall, and taking everything into account, what is most important to you as a water customer? [Multi]
Reliable water supply/no interruptions in supply
Price
Online account management services
Quality of customer service
Quality or accuracy of meter reading / enhanced metering services
Consolidating water and sewerage services to the same retailer
Consolidating multiple premises to the same retailer [for multi-site customers only]
Consolidating different utilities (including water) to the same supplier
Water efficiency, leakage control
Reputation of the retailer
Other (specify)
Nothing in particular

Ask all… K2 Thinking about everything we've discussed today, how satisfied or dissatisfied are you with the water market as a whole?
Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied

Fairly dissatisfied
Very dissatisfied

Organisation Demographics

Ask all… **L1 Including yourself, how many people work for your organisation, across all of your premises?**

1
2-4
5-9
10-19
20-49
50-99
100-249
250+

If definitive number… L2 Is your organisation legally classed as a 'Sole Trader'?
Yes
No

If number of premises is just 1… L3 Are you on a metered supply?
Yes
No

If number of premises is great than 1… L3b Are any of your organisation's premises on a metered supply?
Yes – all premises
Yes – some premises
No – none

Ask all… L4 Approximately what proportion of your organisation's annual running costs go on water and waste water bills?
0-5%
6-10%
11%+