

Research Report



C-MeX and D-MeX shadow year research report for PR19

Prepared for: Ofwat

Prepared by: BMG Research

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1 Introduction

1.1 Background

Since the Water Industry in England and Wales was privatised in 1989, individual water companies have been regulated by the Water Services Regulation Authority (Ofwat), whose role is to help the sector build trust and confidence with customers and wider society. There are currently 17 large water companies operating in England and Wales.

Ofwat introduced the Service Incentive Mechanism (SIM) in 2010 as a way of encouraging water companies to improve their customer service. The SIM programme formed part of the 2014 price review (PR14) for all companies, where companies could receive financial rewards and penalties depending on how well they scored. BMG were proud to work alongside Ofwat and the water companies on the SIM programme from 2016/17 through to 2018/19. The SIM programme has successfully incentivised water companies to improve customer service with a significant lift in overall satisfaction with query handling over time.

Whilst the SIM programme has been effective, Ofwat identified a number of limitations:

- There was no cross-sector benchmarking, meaning that it was limited to comparisons within the water sector;
- SIM scores were converging at the upper end, meaning that change was required to encourage further improvements in customer service;
- It discouraged companies from contacting their customers, which might constrain innovation, service improvement and customer engagement by water companies;
- Changes in how customers interact with their company, especially online, were not accounted for;
- SIM did not address the whole spectrum of customer service experience as it did not include developer services customers or residential customers who had not contacted their water company.

Consequently, the need to update SIM with a more modern, comprehensive and forward-facing programme was identified.

In 2017, Ofwat published its [PR19 final methodology](#) which set out the regulator's renewed vision for the water industry. It outlined the ways in which water companies can and should improve their services by putting customers at the heart of everything that they do – a focus which began back in 2014 with PR14. Customers do not simply want and expect good customer service – they want confidence in their supply, trust in the resilience and sustainability of the water network, and value for money. Complementary to both the UK and Welsh Governments' Strategic Policy Statements, PR19 details Ofwat's expectations for water companies in meeting these needs to ensure that the service customers receive is at least comparable to the service they get elsewhere.

1.2 C-MeX and D-MeX

To meet these objectives, a key facet of PR19 was the replacement of the SIM with the customer measure of experience (C-MeX) and developer services measure of experience (D-MeX).

C-MeX is intended to address not only the limitations of the SIM, but also the changing ways in which customers interact with their water provider. The furthering trend towards online methods of communications and social media requires a new methodology to better capture the views of these customers. In conjunction, the satisfaction levels of water customers need to be analysed against a background of satisfaction in other sectors to truly ensure that the service that they receive is meeting their expectations. C-MeX also expands on the scope of the SIM by also interviewing customers who may not have recently contacted their company.

D-MeX is intended to meet industry calls for a robust measure of levels of satisfaction amongst developer services customers in order to drive improvements in service for new connections customers. Building on quarterly performance data published by Water UK since July 2015, Ofwat aims to measure the satisfaction levels of developer services customers and to reliably and fairly assess how well each company is performing.

To explore the optimum approaches for C-MeX and D-MeX, and following [pilot surveys](#) conducted in 2018, a 'shadow year' was undertaken over 2019/20 in order to refine the methodology in advance of it becoming fully operational in April 2020. The following success criteria were used for the development work, that it:

- encourages companies to improve customer experiences and innovate;
- is simple and meaningful for companies and customers;
- is proportionate;
- is practical to implement;
- measures performance across companies consistently, reliably and fairly; and
- reflects customer behaviour changes and market changes.

The purpose of the shadow year was to complete a dry run of the incentive mechanisms, so that incentive design decisions could be finalised by Ofwat and any implementation issues addressed before the incentives become operational on 1 April 2020. It also provided companies with an indication of their performance giving them information about where to focus their efforts before financial incentives apply. In line with the PR19 final methodology, the shadow year also provided Ofwat and companies with necessary survey data for non-financial bespoke performance commitments in 2019-20 relating to customer service.

Introduction

To assist Ofwat in fulfilling their commitments in the PR19 final methodology, BMG were required to monitor and evaluate a number of specific points relating to C-MeX and D-MeX and to make associated recommendations about how the programme should best move forward after the shadow year. These [recommendations](#) were submitted to Ofwat ahead of its PR19 final determinations (FD) in December 2019.

This research report details the methodology, findings and conclusions from the 12-month developmental shadow year for C-MeX and D-MeX, in preparation for when both incentive mechanisms come into effect from April 2020.

1.2.1 Overall objectives of the project

The overall objectives of the project are to:

- Complete a full-scale dry run (1 May 2019 to 31 March 2020) of C-MeX and D-MeX to support the implementation of these incentives;
- Monitor and advise on certain aspects of the incentive design, provide recommendations and feed in analysis to help Ofwat make its final decisions on C-MeX and D-MeX in the timescales required;
- Provide the data from C-MeX that is required for performance commitments set at PR14 for the SIM¹.

¹ No financial incentives apply to SIM in 2019-20. Instead, the telephone component of the Customer Service survey part of C-MeX is used to proxy the qualitative part of the SIM for those companies with relevant bespoke performance commitments from PR14.

Acronyms used throughout this report

For the reader's convenience, the Table below defines all acronyms used throughout this report, ordered alphabetically.

Table 1: Acronyms used within this report

Acronym	Definition
CAPI	Computer Assisted Paper Interview
CATI	Computer Assisted Telephone Interview
CAWI	Computed Assisted Web Interview
C-MeX	Customer Measure of Experience
CSS	Customer Service Survey
CES	Customer Experience Survey
CSAT	Customer Satisfaction
D-MeX	Developer Services Measure of Experience
FD	Final Determinations
PR14	Price Review 2014
PR19	Price Review 2019
NPS	Net Promoter Score
SIM	Service Incentive Mechanism
WaSC	Water and Sewerage Company
WoC	Water Only Company

1.3 Report authors

BMG were awarded the contract to work alongside Ofwat and all water companies across England and Wales during the shadow year project to provide recommendations on the most appropriate survey approaches for C-MeX and D-MeX for Ofwat's PR19 final determinations which will be implemented from April 2020 when financial incentives become operational. To complete the research project BMG have produced this final report summarising research findings for the shadow year. For reference the main contributors to this project and report were:

- Roger Sant, Chief Research Officer
- Lys Coleman, Research Director
- Stacey Hughes, Associate Director
- Sharon Gowland, Research Manager

2 Executive summary

2.1 Customer Measure of Experience (C-MeX)

C-MeX is a mechanism to incentivise water companies to provide an excellent customer experience for residential customers. C-MeX comprises two survey elements:

- Customer Service survey (CSS) – a customer satisfaction survey amongst a random sample of those who have contacted their water company;
- Customer Experience survey (CES) – a customer satisfaction survey amongst a random sample of the water company’s customers.

This report details the findings from the CSS and the CES and combines the overall satisfaction scores from both surveys to form the shadow year C-MeX scores for each water company.

2.1.1 Customer Service Survey (CSS)

The findings in this section are reported on all data combined over the full 12-month shadow year interviewing period. The total sample size is 15,120 across all 17 water companies.

Reasons for contact

The three most common reasons for contact with water companies concern a recent or planned move, making a payment and reporting a blockage in the sewer/drains/manholes. There are some significant differences between digital and non-digital contactors with respect to their reasons for contact, those who contact their water company digitally do so mainly to provide their water company with updates or to make a transaction whereas non-digital contactors have queries that require a response due to a service interruption such as no supply or a flooding issue.

Query resolution

Three in four (76%) of all respondents surveyed consider the matter they contacted their water company about to be resolved. However, those with an operational (clean or waste water) query are significantly less likely to have considered their query resolved compared to those with a billing query.

Industry CSS satisfaction results

Overall satisfaction with recent experience is high with an overall industry mean score of 79.99 out of 100. Satisfaction levels have significantly improved over the course of the shadow year which may suggest water companies have improved the services they provide to their customers. Those with a billing query are significantly more likely to be satisfied with their recent experience compared to those with a clean water or waste query (82.74 vs. 76.77 and

78.19 respectively). Those with a waste water query are significantly more likely to be satisfied with their recent experience compared to those with a clean water query.

Seven of the seventeen companies have a mean satisfaction score that is significantly higher than the industry average. There are four companies whose overall satisfaction is significantly lower than the industry average.

What companies are doing well

Those who rated their satisfaction level a 9 or 10 were asked to provide a reason for their rating. Speed of response and issue resolution are the key reasons for high levels of satisfaction, followed by their communication.

Areas for improvement

Those who had provided a satisfaction rating of 0 to 6 were asked the reason for their rating. The key reasons provided are a lack of issue resolution as well as issues with communication.

SIM proxy score

The SIM proxy score was calculated to enable companies to assess how they performed against their bespoke performance commitments relating to the SIM in 2019-20. The industry average is 4.25, compared to 4.39 for the 2018/19 SIM. Differences between the two scores range from zero in relation to Severn Trent Water, to -0.44 in relation to Southern Water. It should be borne in mind that SIM proxy utilised only the non-digital contactor scores for CSS to align the survey as closely as possible with SIM, which employed a telephone methodology only regardless of the customer contact channel.

Likelihood to recommend

Out of a score of 100, the industry average for likelihood to recommend is 68.38. Those with a clean water query were significantly less likely to recommend their water company than either those with a billing query or a waste water query (65.67 vs. 69.39 and 70.82 respectively). Where customers were very likely to recommend their water company, the key reasons provided concern a general level of satisfaction (28%) and that they have no complaints or problems (22%). The main reasons provided for being unlikely to recommend, are that there is no choice in the market (16%), billing issues (14%), lack of resolution (13%), communication and general level of satisfaction (both 11%), and customer service issues (10%).

2.1.2 Customer Experience Survey (CES)

The findings in this section are reported on annually aggregated figures for all companies. The total sample size is 13,530.

Industry CES satisfaction results

Out of a score of 100, the industry average for overall satisfaction is 79.58.

Portsmouth Water has the highest mean satisfaction score and is significantly higher than the industry average. Thames Water has the lowest mean satisfaction score and is significantly below the industry average.

What companies are doing well

Close to three in five (59%) state having no problems with their water company is the main reason for rating overall satisfaction with their company a 9 or 10 whilst 15% state the quality of the water was a reason for rating highly.

Areas for improvement

By contrast, the key reasons provided for a low satisfaction rating (0 – 6) are the quality of water (29%) and the billing services (18%). Approximately one in six (16%) cite the reason for their rating is that they have had no interaction with their water company.

Likelihood to recommend

Following on from overall satisfaction with the experience, respondents were asked to rate how likely they would be to recommend their water company to friends or family. Out of a score of 100, the industry average²² for likelihood to recommend is 59.85. Welsh Water has the highest likelihood to recommend score (70.93) and is significantly higher than the industry average. Thames Water (43.59) has the lowest mean satisfaction score and is significantly below the industry average.

Reasons for propensity to recommend

For those who give a 9 or 10 to recommending their water company, key reasons provided are that they had no complaints or problems (41%) and a general level of satisfaction (20%).

The main reasons provided for providing a likelihood to recommend rating of 0 to 6, i.e. being unlikely to recommend, are that there is no choice in the market (18%) and the quality of the water (15%).

²² The average reported here is the NPS, or Net Promoter Score and is the average score of all those rating a 9 or 10 minus those rating a 0 to 6. To achieve an NPS mean score data was re-coded as follows: 10 – 9 re-coded to =100, 8 – 7 re-coded to =50 and 6 – 0 re-coded = 0, the average of this data provides the NPS.

Engagement with water company

Almost half (49%) of all those surveyed have not engaged with their water company by any means in the last 3 months whilst more than one in three (36%) say that have received a paper bill from them followed by 9% who used their online account.

2.1.3 C-MeX score

The final shadow year C-MeX survey scores have been calculated using the following formula, with the annual scores presented below based on a straight average of the four quarters of the shadow year.

$$(40\% \times \text{CSS CSAT}) + (10\% \times \text{CSS NPS}) + (40\% \times \text{CES CSAT}) + (10\% \times \text{CES NPS})$$

These scores have been calculated in line with Ofwat's March 2019 guidance.

The industry average is 76.65, with scores ranging from 82.47 (Welsh Water) to 65.12 (Thames Water). Shadow year C-MeX scores for all water companies can be found in section 3.5.1.

2.2 Developer Services Measure of Experience (D-MeX)

D-MeX is a new mechanism to incentivise water companies to provide an excellent customer experience for their developer services customers. D-MeX includes a monthly customer satisfaction survey amongst a random sample of developer services customers who have contacted their water company (the 'qualitative component') as well as a separate quantitative component which is outside the scope of this study.

What companies are doing well

Speed of response and communication are the top mentions amongst developer services customers, mentioned by 18% and 12% respectively.

Areas for improvement

By contrast, being able to respond quicker to queries is also an area that is felt could be improved, as well improving communication/being kept informed, mentioned by 19% and 11% respectively.

Satisfaction with aspects of service

Developer services customers are most satisfied with the accuracy and completeness of documentation with an average score of 75.42 out of 100, this is followed by the understanding of their needs and by meeting agreed deadlines (71.87 and 71.54 respectively). Value for money is where customers are least likely to be satisfied (59.56) followed by being kept informed on progress (67.29).

Industry satisfaction results

After considering all of the different aspects of service provision the developer services team provide, the industry average overall satisfaction based on a straight average over each of the 4 quarters of shadow year data is 69.20 of a score of 100. Northumbrian Water and Portsmouth Water have the highest satisfaction levels, 78.18 and 78.05 respectively whilst SES Water and Hafren Dyfrdwy have the lowest levels of satisfaction, 53.87 and 59.43 respectively. Shadow year D-MeX scores for all water companies can be found in section 4.5.3.

Most important aspects of service to customers

The most important aspect customers look for in terms of how the service is delivered is speed of response (40%). This is followed by almost one in three stating keeping the customer up to date (32%) and providing value for money (25%).

Customer view on how to make the interaction easier

Having a single point of contact was most likely to be mentioned as a way to make the interaction easier with the Developer Services team (13%). This is followed by better communication and timeliness of response (10% and 8% respectively).

3 Customer Measure of Experience (C-MeX)

3.1 Background

C-MeX is a mechanism to incentivise water companies to provide an excellent customer experience for residential customers. C-MeX comprises two survey elements:

- Customer Service survey (CSS) – a customer satisfaction survey amongst a random sample of those who have contacted their water company;
- Customer Experience survey (CES) – a customer satisfaction survey amongst a random sample of the water company’s customers.

During the shadow year, each of these surveys yielded a customer satisfaction score and a Net Promoter Score (NPS). Each quarter, these were combined to give a single C-MeX score using the following formula:

$$40\% \times \text{CSS CSAT} + 10\% \times \text{CSS NPS} + 40\% \times \text{CES CSAT} + 10\% \times \text{CES NPS}$$

The final annual C-MeX scores for the shadow year were calculated as a straight average of the four quarterly scores.

An alternative method of calculating the C-MeX score has also been explored, whereby an annual, rather than quarterly, average of the scores is taken. This is the method that will be used once C-MeX comes into effect from April 2020, and the results of this analysis are presented in section 3.5.2 *Annual weighting application* of this report.

3.2 Research objectives

The overall objective of the shadow year was to develop C-MeX to the point where it can have financial incentives applied on an annual basis from April 2020 onwards. The C-MeX pilot, alongside Ofwat’s shadow year guidance formed the basis of the research design (sample, methodologies, questionnaire, etc.) for the shadow year.

As well as providing the C-MeX scores and rankings for water companies based on the new 11-point CSAT scales and the combined 11-point NPS scores as a score out of 100, the shadow year was also required to generate a proxy SIM score to enable Ofwat to approximate the qualitative part of the SIM for those companies with relevant performance commitments in 2019-2020.

3.3 Customer Service Survey (CSS)

The CSS is the evolved SIM survey and is designed to capture the views of customers who have recently contacted their water company. The following sections detail the methodology and research findings of this aspect of C-MeX.

3.3.1 Methodology

3.3.1.1 Sample sizes and sampling

The CSS is a monthly survey where one week each month is selected at random to be the sample week for which companies must provide a file containing *all* contacts received from all contact channels during that sample week.

The following quarterly targets were set for each company:

- 200 interviews conducted on a monthly basis, split between telephone (150) and online (50) data collection, according to the original method of contact;
- For water only companies (WoCs) interviews were split equally between billing and water (100 for billing and 100 for water), and for water and waste water companies (WaSCs) interviews were split equally between billing, water operational and waste operational interviews (as detailed in the Table below);

Table 2: Quarterly CSS interview targets for WoCs and WaSCs by type

	Billing	Water	Waste
WoC	100	100	n/a
WaSC	67	66	66

3.3.1.2 Data collection approach

Telephone interviews were conducted with those who were deemed to have contacted the company by a non-digital means (telephone, letter, SMS, in person) and an online survey invite was sent to those who contacted the company by a digital means (email, form on website, live chat on website, social media, app, online water company account).

3.3.1.3 Survey length and content

The survey script, as agreed with Ofwat can be found in Appendix A and lasts approximately 8 – 10 minutes. Questions include reason for contact, method of contact, overall satisfaction with query handling, query resolution, likelihood to recommend and the reasons for the scores provided.

3.3.1.4 Weighting procedure

For the purpose of comparing overall satisfaction between companies there is a requirement to weight the data by type (billing/water/waste) and by the proportion of useable digital contacts provided in each type. Due to the small monthly sample sizes generated, weights are applied quarterly to reduce the high weighting factors that would be seen when weighting low sample sizes on a monthly basis, and so maximise the effective sample sizes.

The weights for the six quota cells (3 types x digital/non-digital) will vary by water company. The shadow year quotas are:

- WoC: billing/water (50%/50%);
- WaSC: billing/water/waste (33%/33%/33%);
- Weights are determined by a combination of Type (as above) and % digital within Type.

As a result, direct comparisons can be made between companies with regard to billing and operational results.

It should be noted that a slightly different approach is used for Bristol Water and Wessex Water, which share call handling for billing, but have separate call handling for operations.

The target number of interviews for the operations elements for Bristol Water and Wessex Water is as outlined above (i.e. 100 for Bristol Water as a Water only company, and 134, split equally between water and waste, for Wessex Water as a WaSC).

For billing, Water only companies have a target of 100, and WASCs have a target of 67 interviews. Consequently 167 billing interviews are undertaken on behalf of Bristol Water and Wessex Water (100 for Bristol Water and 67 for Wessex Water), and these are included for both of the companies.

In July 2018 Dee Valley (a WoC) became Hafren Dyfrdwy supplying both water and sewerage services in Wales, a WaSC. Given that Hafren Dyfrdwy receive an extremely low number of Wastewater contacts which would result in the utilisation of inflated weighting factors for the company, the decision was taken by Ofwat during the SIM survey to combine all completed Hafren Dyfrdwy Wastewater surveys with Severn Trent Water's Wastewater surveys given they share a contact centre for queries in an effort to reduce the high weight factors applied to the data. The same approach has been taken with Severn Trent Water and Hafren Dyfrdwy as is currently taken with Bristol Water and Wessex Water's billing services and noted above.

3.3.1.5 Online correction factor (OCF)

During the pilot study undertaken prior to the shadow year, 425 additional telephone interviews were carried out with digital contactors across the industry in order to directly compare the online and telephone methodologies and determine the cause of the lower online scores that were evident.

It was concluded that there was a methodological impact on the scores (telephone scores being higher than online for this study) and that it was appropriate to apply a correction factor to online scores. Ofwat decided that for the shadow year, the OCF would be an upward correction factor of 5% applied to the online results for the overall satisfaction and likelihood to recommend questions that feed into the C-MeX scores and rankings.

3.3.1.6 Significance testing

Two methods of significance testing are used in this report. The following two-tailed independent tests at the 95% confidence interval have been applied to the data:

- T-test has been used to test for significant differences between percentages;
- Z-test has been used to test for significant differences between mean scores.

All figures that are significantly different from another have been detailed within the body of this report along with the figure they are significantly different from.

3.3.1.7 SIM proxy calculation

In Ofwat's PR19 methodology it confirmed SIM will not operate in 2019-20. In the March guidance document, it described a proxy calculation for SIM that will enable companies to assess whether they have met any relevant bespoke performance commitments in 2019-20.

This calculation relies on the customer service element of C-MeX (excluding online interviews) as a proxy for the qualitative component of SIM (75%). Companies will separately use a proxy calculation for the quantitative component (25% of SIM).

The SIM proxy calibration was required because the SIM survey and CSS survey collect customer satisfaction over different rating scales; SIM was over a 5-point (1 – 5) scale whilst the new CSS survey collects satisfaction levels over an 11-point (0 – 10) scale. The calibrations were performed on the Pilot study Wave 1 distributions - CATI only (CAWI and SMS excluded). This study provided a little over 2,800 CATI cases for each of the SIM 1-5 scale question and the new 0-10 scale question – collected at the same time as part of the same study.

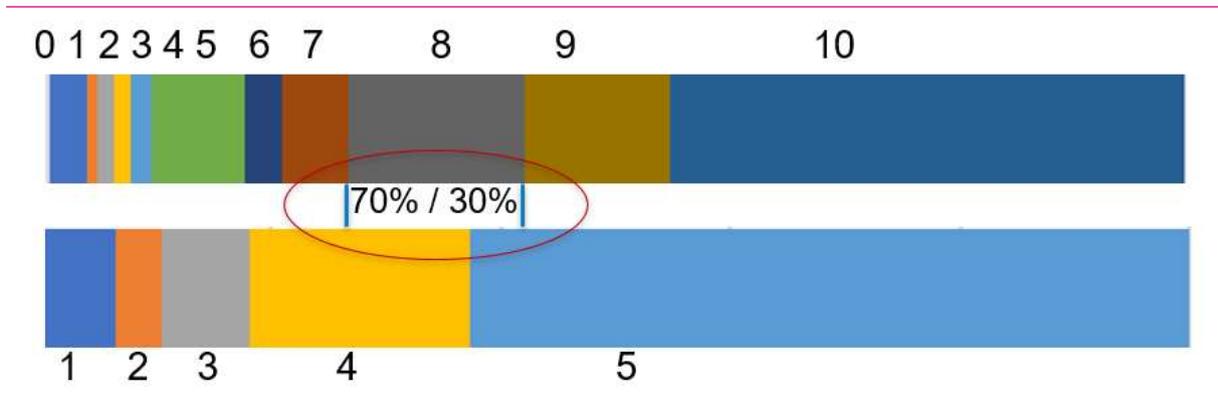
Some numbers in the 0-10 scale fall fully within one of the 1-5 spreads and get recoded accordingly:

- 0, 1 & 2 get recoded as 1;
- 4 gets recoded as 2;
- 7 gets recoded as 4;
- 9 & 10 get recoded as 5.

C-MeX and D-MeX shadow year research report for PR19

Numbers in the 0-10 scale that do not fall fully within one of the 1-5 spreads get recoded proportionately so 8 gets recoded as 4.3 because 70% of it falls in 4 and 30% falls in 5; $(70\% \times 4) + (30\% \times 5) = 4.3$. The calibration approach adopted yields an exact match see Appendix D. The Figure below details how the Pilot data was re-coded.

Figure 1: Re-coding of Pilot data for SIM proxy



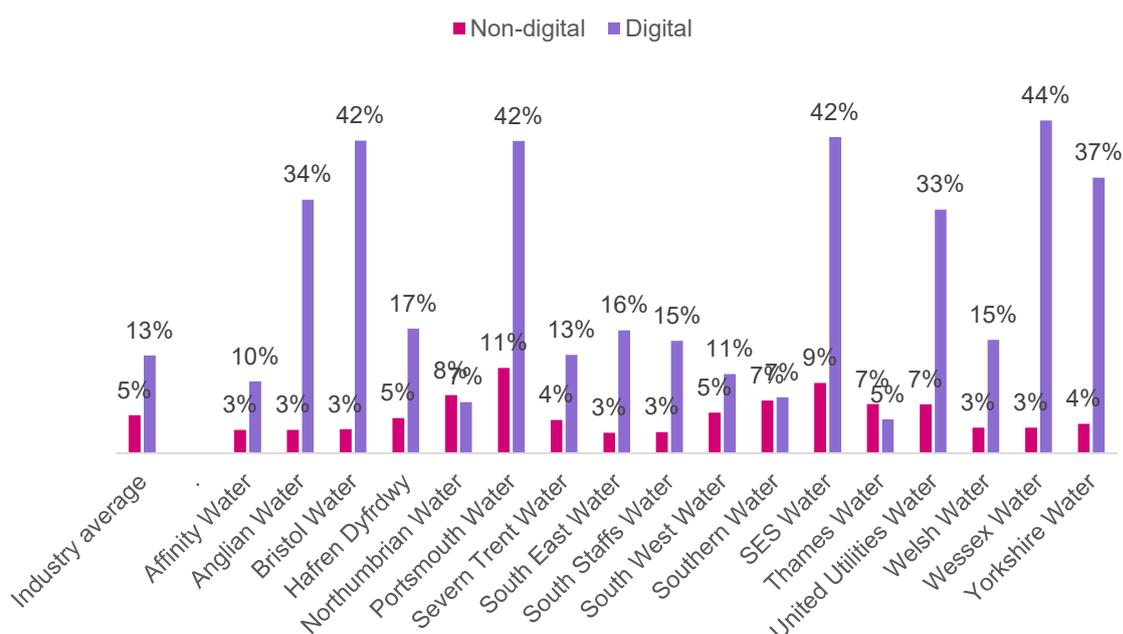
3.3.2 Sample quality

This section looks at the quality of the CSS sample provided by water companies. Information such as number of records provided by water company and the proportion of useable sample is detailed. Analysis by non-digital and digital is also provided.

The volume of contacts sent each month varies significantly between companies ranging on average from 1,364 to 66,215 non-digital contacts and from 362 to 206,310 digital contacts.

The sample quality with respect to missing/invalid contact details is good for non-digital contacts with an industry average of just 5% of submitted contacts identified as invalid/missing with a narrow range of 3%-11%. This compares to an industry average of 13% for digital contacts with a much larger range of 5%-44% indicating that some companies may be more advanced in their digital contact data collection. The extent of missing/invalid contact information by water company can be seen in the following Figure.

Figure 2: Proportion of missing/invalid contact information by water company and method of contact

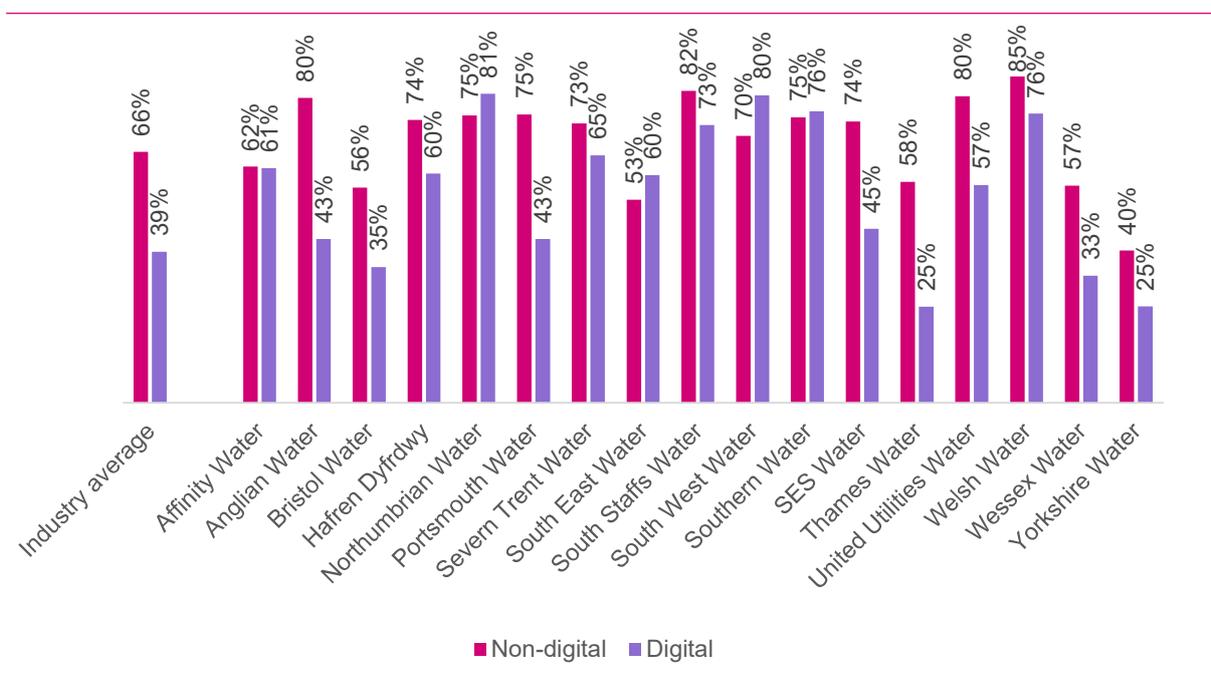


There are a number of removals that are made as part of the data cleansing process to obtain a useable sample. The following are removed from each company submission:

- Duplicate records;
- Invalid and no numbers/emails;
- Commercial contacts.

The total proportion of useable non-digital sample for the industry is 66%. With more than four in five (85%) useable non-digital records, Welsh Water has the highest proportion of useable non-digital sample whilst Yorkshire Water reports the lowest at 40%. With respect to the digital sample received, approaching two in five (39%) of all submitted digital contacts across the industry are useable. Northumbrian Water has the highest proportion of useable digital records at 81% of their submission whilst Thames Water and Yorkshire Water have the lowest with just 25% of submitted contacts useable for fieldwork.

Figure 3: Total proportion of useable records



Customer Measure of Experience (C-MeX)

The Table below details the total annual volume of useable sample by water company. Thames Water has the largest useable volume of both non-digital and digital contacts (463,571 and 622,114 respectively) whereas Hafren Dyfrdwy has the smallest volume of non-digital contacts (12,148) and SES Water has the smallest volume of useable digital contacts.

Table 3: Total annual volume of useable sample by water company

Water company	Total annual useable sample	
	Non-digital	Digital
Total	2,434,346	1,843,227
Affinity Water	118,583	117,718
Anglian Water Water	274,932	332,179
Bristol Water Water	154,882	9,644
Hafren Dyfrdwy	12,148	6,549
Northumbrian Water	173,892	94,476
Portsmouth Water	23,750	2,479
Severn Trent Water	242,383	240,152
South East Water	93,458	45,793
South Staffs Water	66,670	35,309
South West Water	140,324	81,519
Southern Water	160,205	91,672
SES Water	26,911	1,980
Thames Water	463,571	622,114
United Utilities Water	196,861	59,130
Welsh Water	125,540	64,947
Wessex Water	153,458	8,466
Yorkshire Water	146,285	37,347

It should be noted that for the shadow year water companies were required to remove 'company DNCs' (Do Not Contact) from their sample prior to submission. Ofwat defines a company DNC as customers who have told their company that they do not want to be contacted for marketing or other purposes. The other type of DNC are those collated by BMG during the course of the C-MeX and D-MeX surveys, known as 'Ofwat DNCs'. These are customers who, when contacted, have objected to being contacted for the purposes of C-

MeX and D-MeX surveys. BMG has collated 20 Ofwat DNCs over the course of the shadow year; less than 0.5% of all completed interviews. By contrast, the industry average³ proportion of company DNC removals is around 10% each wave, ranging from less than 0.5% to 30%. This range between companies for company DNCs may be explained because no true definition of a company DNC has existed before, as such, some use specific coding whilst other use more generic coding for DNCs. Other factors may also contribute to this range; research into what these may be is beyond the remit of this report.

3.3.3 Check and challenge process

The check and challenge process allows water companies to assess the quality of the completed interviews with their customers to ensure that interviews have been accurately recorded. Where customers have not objected, (59% of all customers did so) recordings of the interviews are provided to the relevant company on a quarterly basis for further review. The types of issue that could be raised as part of the check and challenge process include:

- incorrect categorisation of type of contact;
- interviews wholly relating to non-appointed activity;
- the contact related to a non-household issue;
- basing responses on the performance of external organisations not the water company or its subcontractors;
- manifestly incorrect data capture (including scores) by the interviewer.

BMG received a total of 53 challenges over the course of the shadow year; representing 0.4% of the 13,942⁴ completed surveys. Of the challenges received, 36 were upheld and changes were made to the data to correct miscoding, to reallocate the type or to remove the interview (out of scope contact).

Table 4: Challenges received by water companies

Challenge	Not upheld	Upheld
Change score	4	6
Reallocate	2	3
Remove	11	27

³ Company DNCs as indicated by audit sheet submissions

⁴ 15,120 is the total number of observations reported as a result of the sampling approach taken for Bristol and Wessex billing and Hafren Dyfrdwy and Severn Trent wastewater. The total number of unique interviews achieved during the shadow year is 13,942.

3.3.4 Research findings

The findings in this section are reported on all data combined over the full 12-month shadow year interviewing period. The total sample size is 15,120 across all 17 water companies and includes the duplicated cases for companies with shared data (Bristol Water, Wessex Water, Severn Trent and Hafren Dyfrdwy – see section 3.3.1.4 *CSS weighting procedure* for further details). A breakdown of sample sizes can be found in parentheses in sections where data has been reported with a water company breakdown.

3.3.4.1 Reasons for contact

All respondents were asked to explain in their own words what they called their water company about. Respondents were prompted with the date on screen and the reason for contact available to aid recall of their contact with the water company.

The most common reasons for contact with water companies concerns a recent or planned move (10%), making payments (9%), a blockage in the sewer/drains/manholes (8%) or a query about a bill (7%). All other reasons for contact were mentioned by one in twenty or fewer.

Table 5: Reasons for contact (all respondents, mentions over 1%) (Base: all – unweighted)

Reason for contact	%
Due to a recent move/planning to move	10%
To make a payment	9%
About a blockage in the sewer/drains/manholes	8%
A query about a bill (general)	7%
No supply/water gone off	5%
About flooding with sewage or foul water	5%
The bill seemed too high	4%
Because of a water leak/burst on the road	4%
A query about a payment (general)	3%
Because of a water leak/burst on a property	3%
Regarding low pressure of water	3%
A request for general information	3%
Amend personal details on account	2%
Direct debit set up	2%
To give/request a water meter reading	2%
To apply for/to get a water meter	2%

About the colour of the tap water	2%
About defective/dangerous water equipment	2%
In response to a letter/communication received from the Water company	2%
Sample base	(15,120)

Analysis of these responses by digital versus non-digital contactors reveals those who contact their water company digitally, are significantly more likely than those contacting non-digitally to do so for the following reasons:

- Due to a recent move/planning to move (16% vs. 8%);
- To make a payment (15% vs. 7%);
- A query about a bill (11% vs. 6%); and,
- To give/request a water meter reading (6% vs. 1%).

Those who contact their water company non-digitally, are significantly more likely than those contacting digitally to do so for reasons where a more immediate response is required:

- No supply/water gone off (10% vs. 3%);
- About flooding with sewage or foul water (6% vs. 1%);
- About a blockage in the sewer/drains/manholes (6% vs. 1%);
- Because of a water leak/burst on the road (incl. fields/public footpaths) (5% vs. 2%);
- The bill seemed too high (4% vs. 2%);
- Because of a water leak/burst on a property (3% vs. 1%); and,
- Regarding low pressure of water (3% vs. 1%).

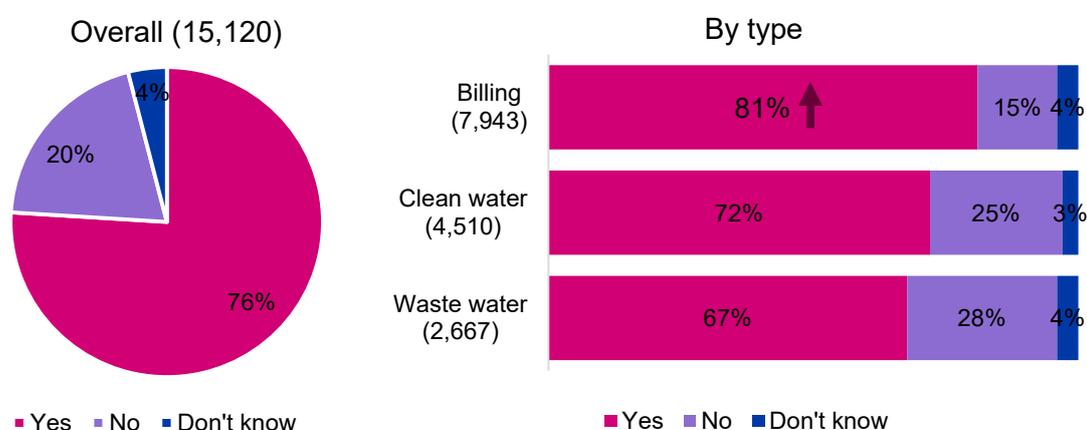
3.3.4.2 Query resolution

All respondents were asked whether they considered the matter they contacted the water company about resolved.

As can be seen in the ‘overall’ pie chart in the Figure below, three quarters (76%) consider the matter they contacted their water company about resolved, and this is consistent across both WoCs and WaSCs.

However, contacts regarding operational issues are significantly less likely than those relating to billing to be regarded as resolved, with around seven in ten of those contacting water companies regarding clean and waste water reporting the issue as closed (72% and 67% respectively), compared to four in five of those making contact for a billing issue (81%).

Figure 4: Query resolution (Base: all – unweighted)



Sample bases in parentheses

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

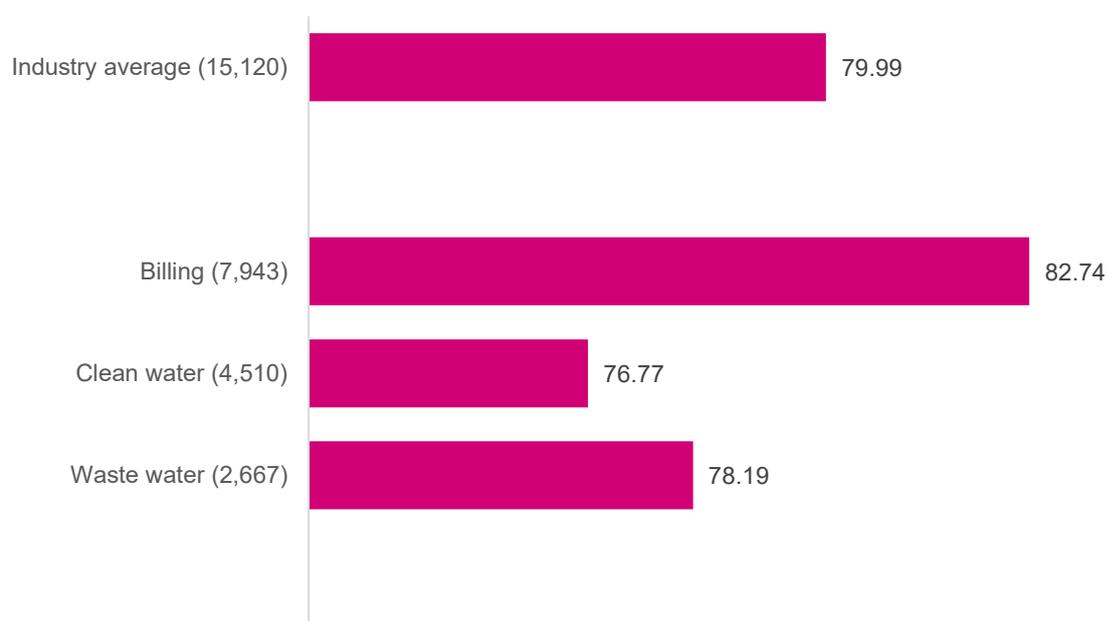
Customers with billing queries are significantly more likely than those with clean water or waste water queries to consider the matter they contacted their water company about resolved (81% vs. 72% and 67% respectively).

3.3.4.3 Industry CSS satisfaction results

All respondents were asked to take everything into account and rate on a scale of 0 – 10, where 0 is extremely dissatisfied, 5 is neither satisfied nor dissatisfied and 10 is extremely satisfied, how satisfied they were with their recent experience with their water company. Out of a score of 100, the industry average for overall satisfaction is 79.99. The Figure below details the mean score satisfaction by type; billing, clean water and waste water.

All significant differences are highlighted in the text below the Figure.

Figure 5: Mean satisfaction with recent experience, overall and by type (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

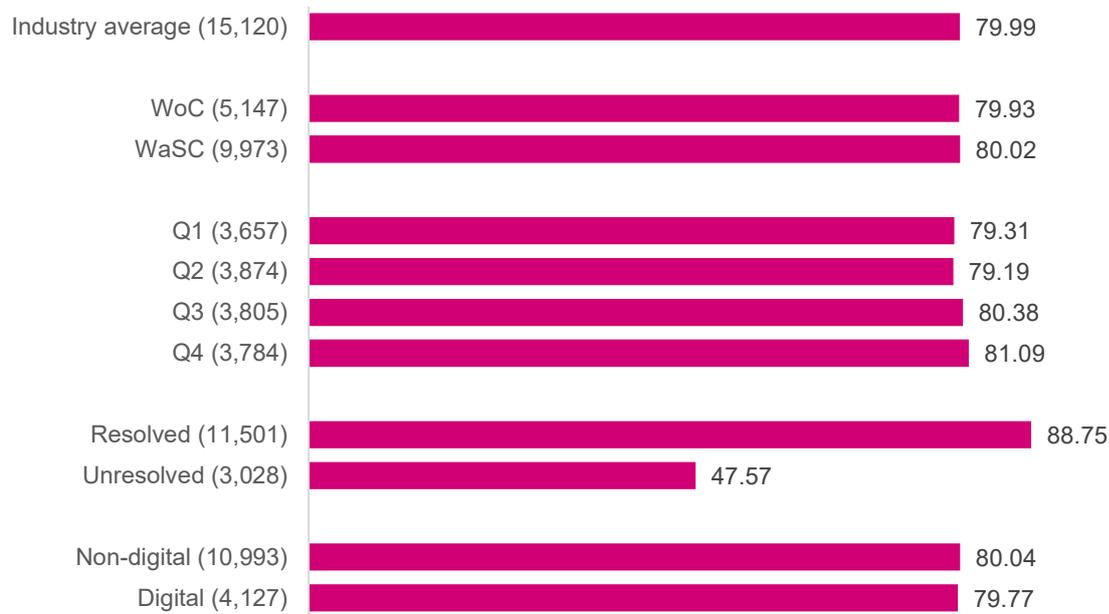
Those with a billing query are significantly more likely to be satisfied with their recent experience compared to those with a clean water or waste query (82.74 vs. 76.77 and 78.19 respectively). Those with a waste water query are significantly more likely to be satisfied with their recent experience compared to those with a clean water query.

Customer Measure of Experience (C-MeX)

The Figure below details the mean score satisfaction by a number of key variables to identify if satisfaction levels vary significantly within certain variables.

All significant differences are highlighted in the text below the Figure.

Figure 6: Mean satisfaction with recent experience, by other variables (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

It is interesting to note the upward trend in satisfaction levels over each quarter of the shadow year; the mean industry satisfaction level in Q4 is significantly higher than that recorded in Q1 and Q2 (81.09 vs. 79.31 and 79.19 respectively).

Perhaps unsurprisingly, those who consider their query to be resolved are significantly more likely than those who consider it unresolved to be satisfied with their recent experience (88.75 and 47.57 respectively).

The following Table ranks all water companies with respect to where they sit in relation to each other based on their overall mean satisfaction with recent experience. Welsh Water has the highest mean satisfaction score and is significantly higher than the industry average. Thames Water has the lowest mean satisfaction score and is significantly below the industry average.

Table 6: Overall CSS satisfaction with recent experience by company (Base: all – weighted)

Water company	Overall satisfaction	Rank	Significantly different from the average
Welsh Water (880)	85.11	1	↑
Wessex Water (1292)	85.04	2	↑
Portsmouth Water (758)	84.90	3	↑
Anglian Water (847)	84.21	4	↑
United Utilities Water (876)	84.20	5	↑
South West Water (836)	82.64	6	↑
Bristol Water (1189)	81.84	7	↑
Northumbrian Water (846)	81.29	8	
Severn Trent Water (958)	81.05	9	
South Staffs Water (822)	80.56	10	
Yorkshire Water (841)	80.15	11	
Industry average (15,120)	79.99		
South East Water (836)	78.29	12	
Affinity Water (813)	78.12	13	
Hafren Dyfrdwy (930)	76.83	14	↓
SES Water (729)	74.89	15	↓
Southern Water (824)	70.22	16	↓
Thames Water (843)	66.60	17	↓

Customer Measure of Experience (C-MeX)

3.3.4.4 What companies are doing well

All respondents were given the opportunity to provide a reason for the satisfaction rating provided, and the table below shows the themed responses for all those who rated their experience as 9 or 10, i.e. very satisfied.

Speed of response and issue resolution are the key reasons for high levels of satisfaction, mentioned by 34% and 30% respectively.

Table 7: Reasons for providing satisfaction rating of 9 or 10 (mentions >2%) (Base: all – unweighted)

	%
Speed of response	34%
Resolution of queries/issues	30%
Communication	19%
Site visit	16%
Overall satisfaction level	16%
Helpfulness/support	16%
Telephone staff	14%
Customer service	13%
Engineer/workers	9%
Dealing with the query/issue	9%
No problems/no dealing/no complaints	9%
Level of efficiency	8%
Easiness of processes (incl. easy to deal with)	8%
Billing services (price, tariff)	4%
Appointment system/timescale	4%
Workmanship/quality of work	4%
Answering the phone/call handling	3%
Online services (website, twitter, app, web chat)	3%
Investigation	3%
Unweighted sample base	(8,690)

3.3.4.5 Areas for improvement

By contrast, where customers provided a satisfaction rating of 0 to 6, the key reasons provided for this are a lack of issue resolution (29%) and issues with communication (27%). Approximately one in six (15%) mention speed of response and billing services.

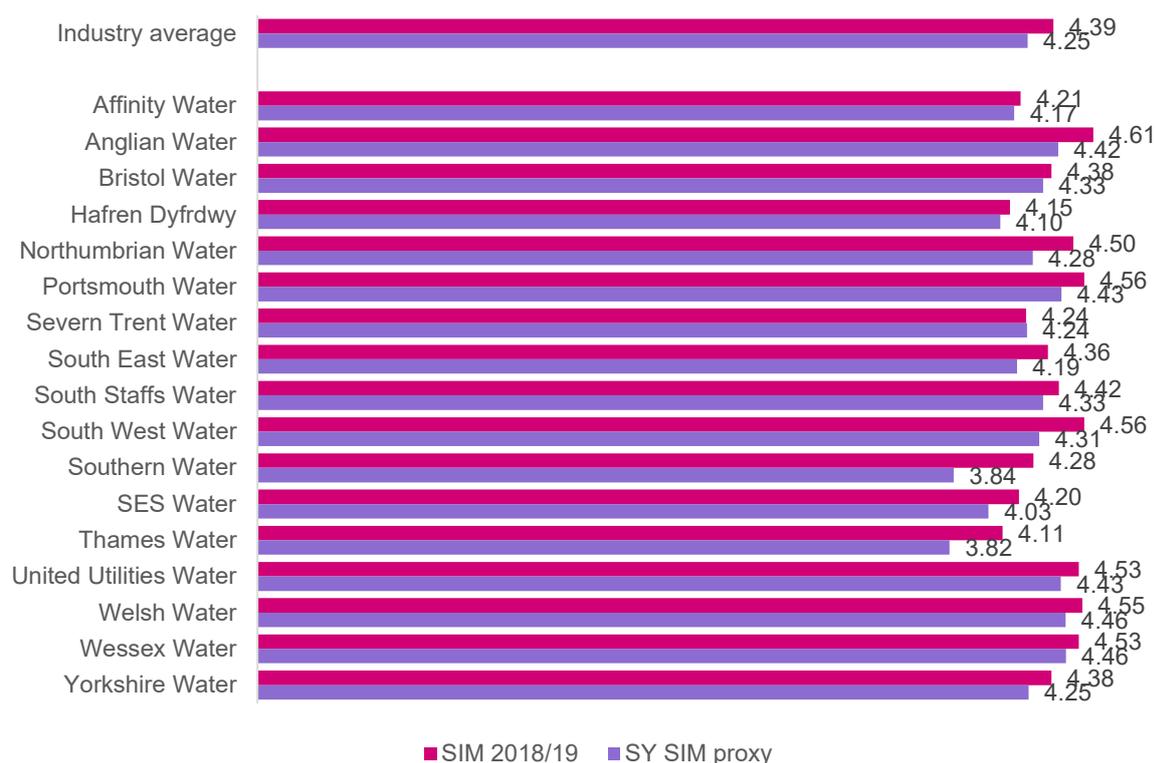
Table 8: Reasons for providing satisfaction rating of 0 to 6 (mentions >2%) (Base: all – unweighted)

	%
Resolution of queries/issues	29%
Communication	27%
Speed of response	15%
Billing services (price, tariff)	15%
Site visit	9%
Dealing with the query/issue	7%
Overall satisfaction level	7%
Customer service	7%
Telephone staff	6%
Keeping promises	6%
Workmanship/quality of work	5%
Helpfulness/support	5%
Engineer/workers	4%
Answering the phone/call handling	4%
Online services (website, twitter, app, web chat)	4%
Ownership/responsibility	4%
Appointment system/timescale	3%
Refund/Compensation	3%
Investigation	3%
Easiness of processes (incl. easy to deal with)	3%
Unweighted sample base	(3,465)

3.3.4.6 SIM proxy score

As detailed in the methodology section, SIM proxy scores (qualitative component only) have been calculated based on telephone surveys in order to align as closely as possible with SIM (which was all telephone surveying). Data must be caveated with the reminder that telephone interviewing in the shadow year was amongst those who had had non-digital contact with their water company for their query, whereas SIM included digital contactors within the telephone sample. Furthermore, the shadow year used an 11-point rating scale of 0 – 10 whereas SIM used a 5-point scale of 1 – 5, different scales may elicit different answers, as the 11-point scale allows for a greater variation in response compared to the 5-point scale, this has been mitigated in the SIM proxy calibrations as described in the methodology section. To provide context, the figure below displays the 2018/19 SIM⁵ scores (qualitative component only) by water company and also the shadow year SIM proxy scores. The SIM proxy industry average is 4.25, compared to 4.39 for the 2018/19 SIM. Differences between the two scores range from zero in relation to Severn Trent Water, to -0.44 in relation to Southern Water.

Figure 7: 2018/19 SIM scores (qualitative component only) versus shadow year SIM proxy (2018/19 base: all – weighted n=15,154)



⁵ Conducted over 2018/19. Annual report is available here: https://www.ofwat.gov.uk/wp-content/uploads/2019/09/9938_Ofwat_FY_Report_2018_19.pdf

In terms of rankings, the companies that appeared in the top ten in 2018/19 also appear in the top ten using the shadow year SIM proxy. The table below shows how the rankings for 2018/19 and the SIM proxy compare.

Because South West Water acquired Bournemouth Water following PR14, it should be noted that South West Water included customers of Bournemouth Water during the shadow year, which was not the case for SIM in 2018/19, where the two companies were measured separately.

Table 9: 2018/19 SIM ranking and shadow year SIM proxy ranking⁶

	2018/19 SIM ranking	Shadow year SIM proxy ranking	Change in ranking
Welsh Water	4	1	+3
Wessex Water	5	1	+4
Portsmouth Water	2	3	-1
United Utilities Water	5	3	+2
Anglian Water	1	5	-4
South Staffs Water	8	6	+2
Bristol Water	9	6	+3
South West Water	2	8	-6
Northumbrian Water	7	9	-2
Yorkshire Water	9	10	-1
Severn Trent Water	13	11	+2
South East Water	11	12	-1
Affinity Water	14	13	+1
Hafren Dyfrdwy	16	14	+2
SES Water	15	15	=
Southern Water	12	16	-4
Thames Water	17	17	=

For the shadow year, these proxy scores for the qualitative component of SIM are to be combined in each company's 2019-20 annual performance report with a quantitative component to create an overall proxy SIM score, with the former accounting for 75%, and the latter accounting for 25% of the final score.

⁶ Bournemouth Water has been excluded from the SIM data and companies have been re-ranked out of 17

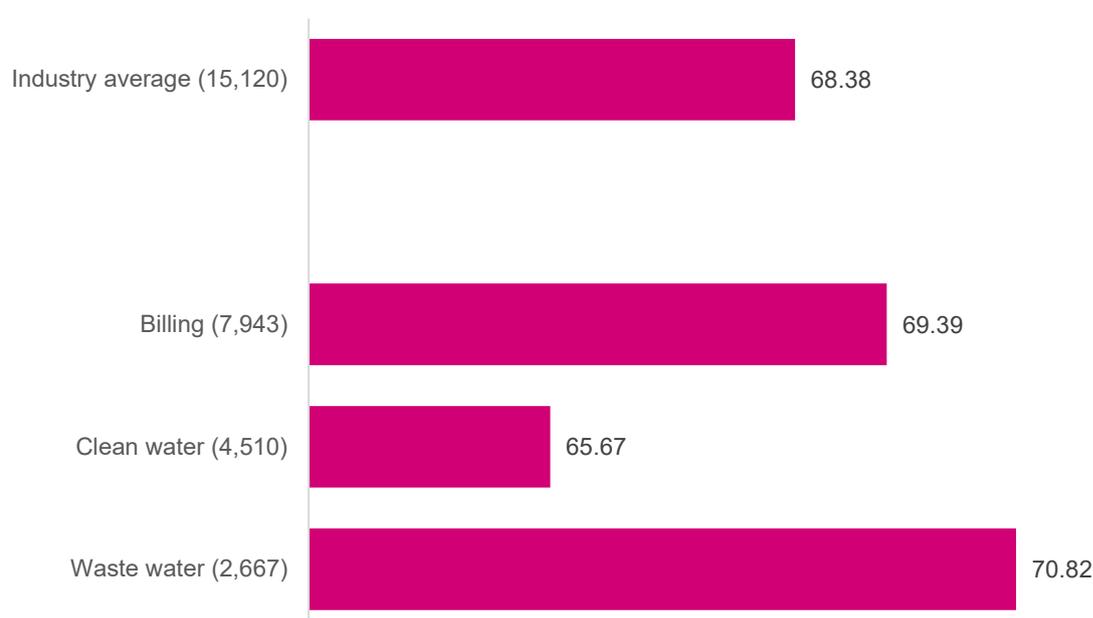
3.3.4.7 Likelihood to recommend

Following on from overall satisfaction with the experience, respondents were asked to rate how likely they would be to recommend their water company to friends or family on a scale of 0 – 10, where 0 is not at all likely and 10 is extremely likely.

Out of a score of 100, the industry average⁷ for likelihood to recommend is 68.38. The Figure below details the mean score for likelihood to recommend by type; billing, clean water and waste water.

All significant differences are highlighted in the text below the Figure.

Figure 8: Likelihood to recommend water company, overall and by type (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

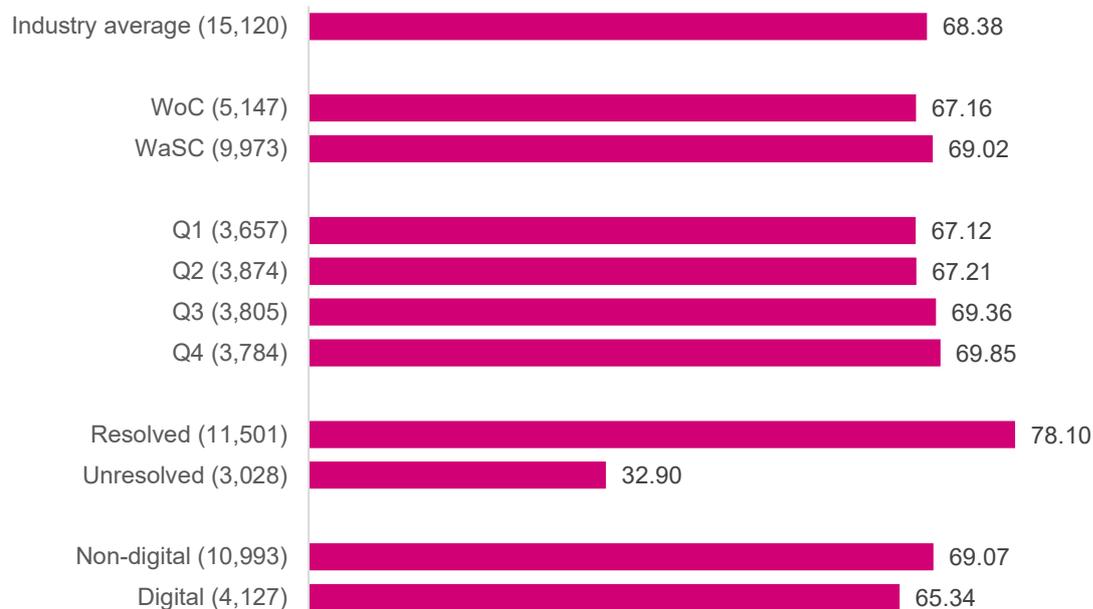
Those with a clean water query are significantly *less* likely to recommend their water company than either those with a billing query or a waste water query (65.67 vs. 69.39 and 70.82 respectively).

⁷ The average reported here is the NPS, or Net Promoter Score and is the average score of all those rating a 9 or 10 minus those rating a 0 to 6. To achieve an NPS mean score data was re-coded as follows: 10 – 9 re-coded to =100, 8 – 7 re-coded to =50 and 6 – 0 re-coded = 0, the average of this data provides the NPS.

The Figure below details the mean likelihood to recommend by a number of key variables to identify if the propensity to recommend varies significantly amongst certain variables.

All significant differences are highlighted in the text below the Figure.

Figure 9: Likelihood to recommend water company, by other variables (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

An upward trend over each quarter of the shadow year is also seen for likelihood to recommend as is identified with overall satisfaction levels; the mean industry satisfaction level in Q4 is the highest of all quarters and is significantly higher than that recorded in Q1 and Q2 (69.85 vs. 67.12 and 67.21 respectively). Q3 (69.36) is also significantly higher than the mean likelihood to recommend seen in Q1 and Q2.

Those who consider their query to be resolved are significantly more likely than those who consider it unresolved to recommend their water company (78.10 and 32.90 respectively).

Non-digital contactors are significantly more likely than digital contactors to recommend their water company (69.07 vs. 65.34).

Customer Measure of Experience (C-MeX)

The following Table ranks all water companies with respect to where they sit in relation to each other based on the customer's likelihood to recommend. Welsh Water has the highest likelihood to recommend score and is significantly higher than the industry average. Thames Water has the lowest mean satisfaction score and is significantly below the industry average.

Table 10: Likelihood to recommend by company (Base: all – weighted)

Water company	Likelihood to recommend	Rank	Significantly different from the average
Welsh Water	80.06	1	↑
Portsmouth Water	75.68	2	↑
Wessex Water	75.45	3	↑
United Utilities Water	75.11	4	↑
Northumbrian Water	73.02	5	↑
Yorkshire Water	72.40	6	↑
Anglian Water	72.37	7	↑
Severn Trent Water	71.57	8	↑
Bristol Water	70.34	9	
South Staffs Water	69.32	10	
Industry average	68.38		
South West Water	65.15	11	↓
Hafren Dyfrdwy	63.65	12	↓
South East Water	62.92	13	↓
Affinity Water	62.20	14	↓
SES Water	61.00	15	↓
Southern Water	53.55	16	↓
Thames Water	51.09	17	↓

3.3.4.8 Reasons for likelihood to recommend

Where customers provided a score of 9 or 10, i.e. were very likely to recommend their water company, the key reasons provided are a general level of satisfaction (28%) and that they have no complaints or problems (22%).

Table 11: Reasons for providing likelihood to recommend score of 9 or 10 (mentions >2%) (Base: all – unweighted)

	%
Overall satisfaction level	28%
No problems/no complaints	22%
Speed of response	13%
Resolution of queries/issues	10%
Customer service	10%
Helpfulness/support	10%
No choice/nothing to compare	9%
Communication	7%
Level of efficiency	7%
Telephone staff	5%
Site visit	5%
Dealing with the query/issue	5%
Easiness of processes (incl. easy to deal with)	4%
Billing services (price, tariff)	3%
Engineer/workers	3%
Answering the phone/call handling	3%
Unweighted sample base	(8,174)

Customer Measure of Experience (C-MeX)

The main reasons provided for providing a likelihood to recommend rating of 0 to 6, i.e. being unlikely to recommend, are that there is no choice in the market (16%), billing issues (14%), lack of resolution (13%), communication and general level of satisfaction (both 11%), and customer service issues (10%).

Table 12: Reasons for providing likelihood to recommend rating of 0 to 6 (mentions >2%) (Base: all – unweighted)

	%
No choice/nothing to compare	16%
Billing services (price, tariff)	14%
Resolution of queries/issues	13%
Communication	11%
Overall satisfaction level	11%
Customer service	10%
Speed of response	6%
Dealing with the query/issue	4%
Helpfulness/support	4%
Telephone staff	3%
No problems/no dealing/no complaints	3%
Workmanship/quality of work	3%
Unweighted sample base	(3,337)

3.3.4.9 Quarterly vs. annual weighting of overall satisfaction and likelihood to recommend

The shadow year guidance detailed the requirement for quarterly weighting⁸ of the data. However, when C-MeX comes into effect from April 2020, this will employ annual weighting⁹ for overall satisfaction and likelihood to recommend.

Data has been weighted both quarterly and annually on the shadow year data to understand what difference this has on the scores, if any and to provide a potential comparator for when C-MeX comes into effect from April 2020. At an industry level, the difference in scores as a result of the different weighting approaches is not significant for either overall satisfaction or for likelihood to recommend.

Table 13: Quarterly vs. annual weighting of overall satisfaction and likelihood to recommend

	Quarterly weights	Annual weights	Difference
Industry average overall satisfaction	79.99	80.03	+0.04
Industry average likelihood to recommend	68.38	68.50	+0.12

⁸ Weights are calculated using available sample and completed interviews over three waves of data for each of the six cells if a WaSC (four cells if a WoC): billing/clean/waste by digital/non-digital.

⁹ Weights are calculated using available sample and completed interviews over all 12 waves of data for each of the six cells if a WaSC (four cells if a WoC): billing/clean/waste by digital/non-digital.

3.4 Customer Experience Survey (CES)

3.4.1 Methodology

The CES is a new addition to monitoring customer satisfaction with water companies and its purpose is to measure the satisfaction of water users aged 18 or over with their water company.

3.4.2 Sample sizes and sampling

The sample size for the CES was 200 interviews per company per quarter, with interviews conducted on a monthly basis. For the shadow year, age and gender targets were set by water company based on Census statistics for each water company's service area. The Table below details the Census statistics used for the shadow year.

Table 14: Age and gender census statistics by water company

	18-29	30-44	45-64	65+	Male	Female
Affinity Water	20%	28%	32%	20%	49%	51%
Anglian Water	18%	25%	34%	23%	49%	51%
Bristol Water	21%	26%	32%	21%	49%	51%
Cambridge Water	20%	26%	32%	21%	49%	51%
Hafren Dyfrdwy	18%	24%	35%	23%	50%	50%
Northumbrian Water	20%	25%	34%	22%	49%	51%
Portsmouth Water	20%	23%	32%	24%	49%	51%
Severn Trent Water	21%	25%	32%	21%	49%	51%
South East Water	17%	26%	34%	23%	49%	51%
South West Water	17%	22%	34%	27%	49%	51%
Southern Water	20%	25%	33%	22%	49%	51%
SES Water	17%	27%	35%	21%	49%	51%
Thames Water	25%	32%	28%	15%	49%	51%
United Utilities Water	21%	25%	33%	21%	49%	51%
Welsh Water	20%	23%	34%	23%	49%	51%
Wessex Water	17%	23%	35%	25%	49%	51%
Yorkshire Water	21%	25%	33%	21%	49%	51%

3.4.3 Data collection approach

A mixed methodology was employed utilising a telephone and face-to-face approach to capture the views of those aged 18+, using the script as agreed with Ofwat. The face-to-face methodology was utilised to capture the younger demographic¹⁰; 18-29 and 30-44 whilst the telephone was used to collect the views of those aged 45-64 and 65+. Respondents did not have to be the account holder.

In order to complete the telephone target interview, a combination of Random Digit Dial (RDD), mobile and lifestyle data telephone numbers were purchased.

For the face-to-face interviews, the guidance required coverage of two locations within each water company's operating area, each quarter. Locations were not defined in the guidance so after consideration of the fact that 8 locations were required for each water company over the shadow year, electoral ward was used to define what 'location' meant to ensure there were enough locations to select from for each water company. Interviewers were instructed to free find respondents in-street within each of the selected wards.

Water company recognition

The proportion of respondents who know their company was high; 93% provided the name of their water company when asked and only 7% required the assistance of Water UK's online [postcode checker](#) for verification of which water company supplies their home.

3.4.4 Survey length and content

The survey script, as agreed with Ofwat can be found in Appendix B and lasts approximately 8 – 10 minutes. Questions include overall satisfaction with the experience of their water company, reason for rating, likelihood to recommend company to friends or family including reason for rating, who is the household bill payer and if there has been recent contact with the water company.

3.4.5 Weighting procedure

Weighting data was minimal as targets were set based on age and gender Census statistics. In instances where targets were not achieved (i.e. achievement varied marginally around the target figure) data was weighted to these same statistics to ensure representation by age and gender of the profile of customers within each company's operating area. See the Sample sizes and sampling section for these weights.

¹⁰ The initial survey methodology employed the age bands: 18-24, 25-34, 35-49, 50-64 and 65+. The views of those aged 18-24 and 25-34 were sought face-to-face and the views of those aged 35+ via telephone. It became apparent during the course of fieldwork that the landscape for Random Digit Dial (RDD) telephone interviewing has changed and it was challenging to achieve targets for the 35-49 age group via telephone. It was therefore agreed with Ofwat that age bands would be re-designed in a way that maintained age band groupings for weighting and analysis purposes and that views of that 'difficult to reach' age band could instead be sought face-to-face.

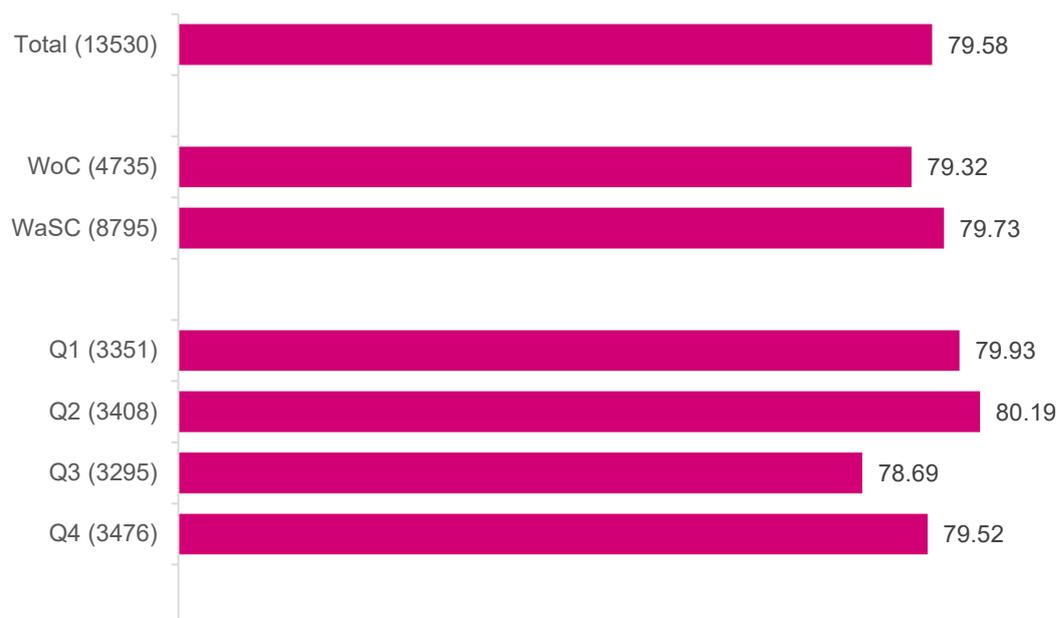
3.4.6 Research findings

The findings in this section are reported on annually aggregated figures for all companies. The total sample size is 13,530. A breakdown of sample sizes can be found in parentheses in sections where data has been reported with a water company breakdown.

3.4.6.1 Industry CES satisfaction results

Respondents were asked to think about their experience with their water company and rate on a scale of 0 – 10, where 0 is extremely dissatisfied, 5 is neither satisfied nor dissatisfied and 10 is extremely satisfied, how satisfied they were. Out of a score of 100, the industry average for overall satisfaction is 79.58. The Figure below details the mean score satisfaction overall and split by quarter. All significant differences are highlighted in the text below the Figure.

Figure 10: Mean satisfaction with experience, overall, by WoC/WaSC and by quarter (Base: all – weighted)



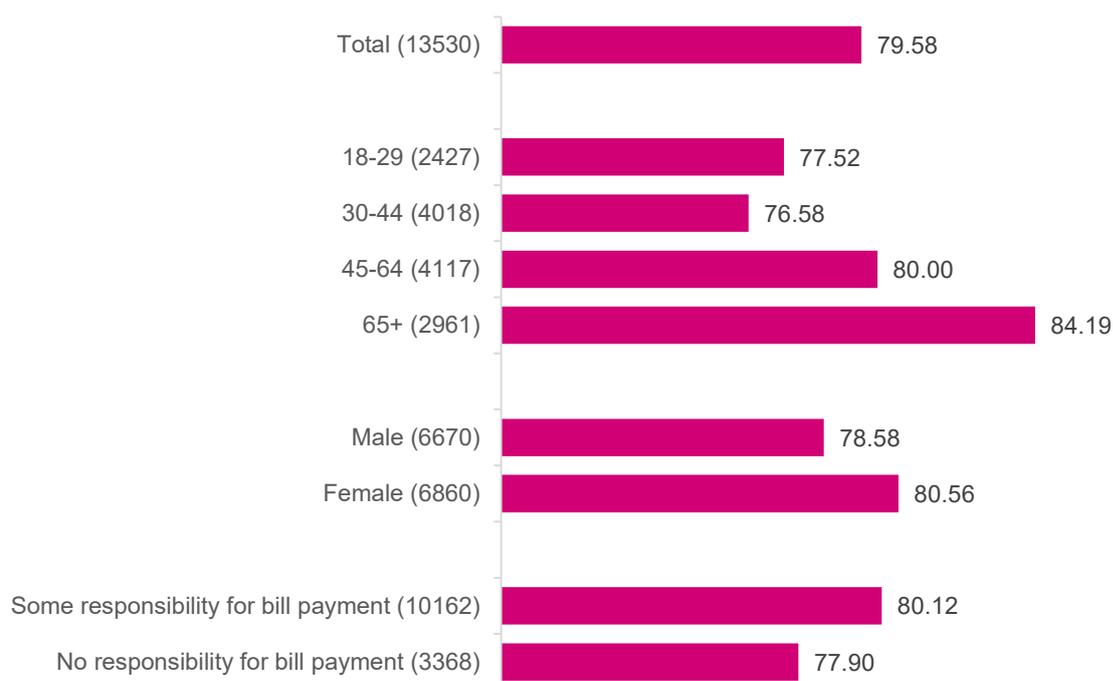
Unweighted sample bases in parentheses. Quarterly weighting applied

Overall, satisfaction with the experience of the water company remains largely consistent throughout the year with a range of just 1.5 between the highest satisfaction score reported in Q2 and the lowest reported during Q3 of the shadow year. Satisfaction in Q3 is significantly lower than that recorded in the preceding two quarters but improves in Q4. This may be a seasonal effect as Q3 and Q4 were completed in the autumn and winter months:

- Q1 and Q2 ran through summer months May 2019 – September 2019;
- Q3 was the quarter running up to Christmas October 2019 – December 2019 and;
- Q4 was completed between January 2020 – March 2020.

The Figure below details the mean score satisfaction by key demographics; age and gender as well as responsibility for payment of the water bill to identify if satisfaction levels vary significantly between these variables. All significant differences are highlighted in the text below the Figure.

Figure 11: Mean satisfaction with experience, overall and by key demographics (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

Analysis reveals that the older demographics (those aged 45+) are significantly more likely to be satisfied with their experience with the water company;

- On average, those aged 45-64 score their satisfaction 80.00 whilst those aged 65+ score 84.19; the satisfaction is significantly higher than any age group. This compares with;
- Those aged 30-44 providing an average score of 76.58 and those aged 18-29 giving an average of 77.52.

Female respondents are significantly more likely than male respondents to be satisfied with their experience with their water company (80.56 vs. 78.58).

Furthermore, those who have some or all responsibility for paying the water bill are significantly more likely than those with no responsibility to be satisfied with their experience (80.12 vs. 77.90).

Customer Measure of Experience (C-MeX)

The following Table ranks all water companies with respect to where they sit in relation to each other based on their overall mean satisfaction. Portsmouth Water has the highest mean satisfaction score and is significantly higher than the industry average, as are Welsh Water, Northumbrian Water, Yorkshire Water and Wessex Water. Thames Water has the lowest mean satisfaction score and is significantly below the industry average, along with Southern Water, Affinity Water, South East Water and South West Water.

Table 15: Overall satisfaction with experience by company (Base: all – weighted)

Water company	Overall satisfaction	Rank	Significantly different from the average
Portsmouth Water (793)	83.81	1	↑
Welsh Water (806)	83.31	2	↑
Northumbrian Water (795)	82.75	3	↑
Yorkshire Water (800)	82.62	4	↑
Wessex Water (787)	82.45	5	↑
Bristol Water (796)	80.60	6	
United Utilities Water (803)	80.53	7	
South Staffs Water (790)	80.40	8	
Anglian Water (794)	80.14	9	
Hafren Dyfrdwy Water (785)	79.74	10	
Severn Trent Water (806)	79.72	11	
Industry average (13,530)	79.58		
SES Water (780)	78.43	12	
South West Water (809)	78.00	13	↓
South East Water (789)	76.37	14	↓
Affinity Water (787)	76.25	15	↓
Southern Water (801)	75.15	16	↓
Thames Water (809)	72.53	17	↓

3.4.6.2 What companies are doing well

All respondents were given the opportunity to provide a reason for the satisfaction rating provided, and the table below shows the themed responses for all those who rated their experience as 9 or 10, i.e. very satisfied.

For close to three in five (59%), having no problems with their water company is the main reason for rating overall satisfaction with their company a 9 or 10 whilst 15% state the quality of the water was a reason for rating highly.

Table 16: Reasons for providing satisfaction rating of 9 or 10 (mentions >2%) (Base: all – unweighted)

	%
No problems/no dealing/no complaints	59%
Quality of water	15%
Overall satisfaction level	13%
Supply of water	9%
Billing services (price, tariff)	6%
Resolution of queries/issues	6%
Speed of response	5%
Communication (easy to contact)	4%
Helpfulness/support	2%
Site visits	2%
Unweighted sample base	(5,893)

3.4.6.3 Areas for improvement

By contrast, where customers provided a satisfaction rating of 0 to 6, the key reasons provided are the quality of water (29%) and the billing services (18%). Approximately one in six (16%) cite the reason for their rating is that they have had no interaction with their water company.

Table 17: Reasons for providing satisfaction rating of 0 to 6 (mentions >2%) (Base: all – unweighted)

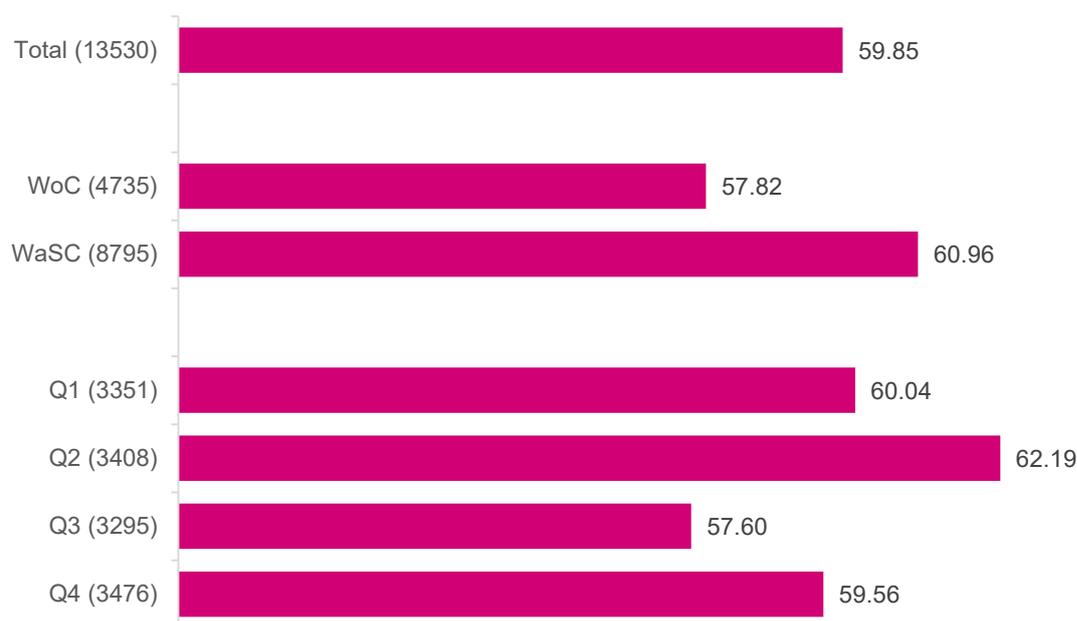
	%
Quality of water	29%
Billing services (price, tariff)	18%
No problems/no dealing/no complaints	16%
Overall satisfaction level	8%
Supply of water	6%
Water pressure	4%
Resolution of queries/issues	3%
Speed of response	3%
Communication (easy to contact)	3%
No choice/nothing to compare to	2%
Unweighted sample base	(2,677)

3.4.6.4 Likelihood to recommend

Following on from overall satisfaction with the experience, respondents were asked to rate how likely they would be to recommend their water company to friends or family on a scale of 0 – 10, where 0 is not at all likely and 10 is extremely likely.

Out of a score of 100, the industry average¹¹ for likelihood to recommend is 59.85. The Figure below details the mean score for likelihood to recommend by WoC vs. WaSC and over each quarter. All significant differences are highlighted in the text below the Figure.

Figure 12: Likelihood to recommend overall, by WoC/WaSC and by quarter (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

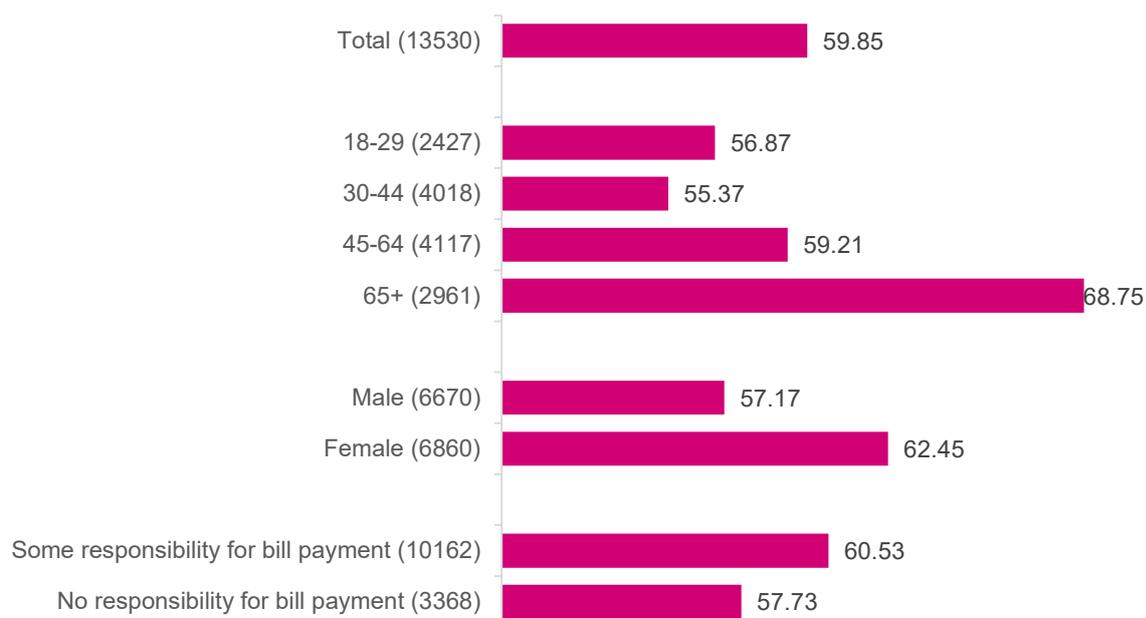
Those services by a WaSC are significantly more likely than those services by a WoC to recommend their water company to friends and family (60.96 and 57.82 respectively). Analysing the data by quarter reveals a similar pattern to that seen for overall satisfaction; likelihood to recommend is highest in Q2 and this is significantly higher than any other quarter, it is also the same quarter where satisfaction was highest. Similarly, likelihood to recommend is lowest in Q3 but is only significantly lower than Q1 and Q2. It is also the quarter where overall satisfaction was lowest.

¹¹¹¹ The average reported here is the NPS, or Net Promoter Score and is the average score of all those rating a 9 or 10 minus those rating a 0 to 6. To achieve an NPS mean score data was re-coded as follows: 10 – 9 re-coded to =100, 8 – 7 re-coded to =50 and 6 – 0 re-coded = 0, the average of this data provides the NPS.

Customer Measure of Experience (C-MeX)

The Figure below details likelihood to recommend by key demographics; age and gender as well as responsibility for payment of the water bill to identify if the propensity to recommend varies significantly between these variables. All significant differences are highlighted in the text below the Figure.

Figure 13: Likelihood to recommend, overall and by key demographics (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied

Analysis reveals that the older demographics (those aged 45+) are significantly more likely to recommend their water company compared with those under 45;

- On average, likelihood to recommend amongst those aged 45-64 is 59.21 whilst those aged 65+ is 68.75; which is significantly higher than any age group.

This is compared with;

- The likelihood to recommend amongst those aged 30-44 being 55.37 and 56.87 amongst those aged 18-29.

Female respondents are significantly more likely than male respondents to recommend their water company (62.45 vs. 57.17).

The following Table ranks all water companies with respect to where they sit in relation to each other based on the customer's likelihood to recommend. Welsh Water has the highest likelihood to recommend score and is significantly higher than the industry average. Thames Water has the lowest mean satisfaction score and is significantly below the industry average.

Table 18: Likelihood to recommend by company (Base: all – weighted)

Water company	Likelihood to recommend	Rank	Significantly different from the average
Welsh Water	70.93	1	↑
Portsmouth Water	70.36	2	↑
Yorkshire Water	68.51	3	↑
Northumbrian Water	67.24	4	↑
Wessex Water	65.03	5	↑
United Utilities Water	63.54	6	↑
Severn Trent Water	61.81	7	
South Staffs Water	61.57	8	
Bristol Water	61.21	9	
Anglian Water	60.27	10	
Hafren Dyfrdwy	60.15	11	
Industry average	59.85		
South West Water	55.77	12	↓
SES Water	54.28	13	↓
Southern Water	53.51	14	↓
South East Water	52.06	15	↓
Affinity Water	47.30	16	↓
Thames Water	43.59	17	↓

Customer Measure of Experience (C-MeX)

3.4.6.5 Reasons for propensity to recommend

Where customers provided a score of 9 or 10, i.e. were very likely to recommend their water company, the key reasons provided are that they had no complaints or problems (41%) and a general level of satisfaction (20%).

Table 19: Reasons for providing likelihood to recommend score of 9 or 10 (mentions >2%) (Base: all – unweighted)

	%
No problems/no dealing/no complaints	41%
Overall satisfaction level	20%
No choice/nothing to compare to	12%
Quality of water	7%
Billing services (price, tariff)	4%
Supply of water	3%
Speed of response	2%
Communication (easy to contact)	2%
Resolution of queries/issues	2%
Customer service (politeness, friendliness)	2%
Helpfulness/support	2%
Reliability	2%
Unweighted sample base	(5,893)

The main reasons provided for providing a likelihood to recommend rating of 0 to 6, i.e. being unlikely to recommend, are that there is no choice in the market (18%) and the quality of the water (15%).

Table 20: Reasons for providing likelihood to recommend rating of 0 to 6 (mentions >2%) (Base: all – unweighted)

	%
No choice/nothing to compare to	18%
Quality of water	15%
No problems/no dealing/no complaints	10%
Overall satisfaction level	10%
Billing services (price, tariff)	10%
Wouldn't recommend a water company to anyone	4%
Supply of water	2%
Communication (easy to contact)	2%
Resolution of queries/issues	2%
Customer service (politeness, friendliness)	2%
Unweighted sample base	(2,677)

3.4.6.6 Quarterly vs. annual weighting of overall satisfaction and likelihood to recommend

Similarly, for the CES survey as for the CSS survey, data has been weighted both quarterly and annually on the shadow year data to understand what difference this has on the scores, if any.

At an industry level, the difference in scores as a result of the different weighting approaches is not significant for either overall satisfaction or for likelihood to recommend.

Table 21: Quarterly vs. annual weighting of overall satisfaction and likelihood to recommend

	Quarterly weights	Annual weights	Difference
Industry average overall satisfaction	79.58	79.52	-0.06
Industry average likelihood to recommend	59.85	59.68	-0.17

3.4.6.7 Engagement with water company

All respondents were asked if, in the last 3 months they had engaged with their water company via a number of different channels. As can be seen in the Figure below, almost half (49%) of all those surveyed have not engaged with their water company by any means in the last 3 months whilst more than one in three (36%) say that have received a paper bill from them followed by 9% who used their online account. Around one in ten (11%) state they have not interacted with their company via post, online or text message but they have done so in another way.

Figure 14: Engagement with water company via different channels (Base: all – unweighted)



Unweighted sample base: 13,530

Analysis of this data by age reveals that those aged 18-29 are significantly more likely than any other group to have not interacted with their water company in the last 3 months (74% vs. 54% of 30-44s, 38% of 45-64s and 39% of those aged 65+).

Students and the unemployed are significantly more likely to not have had any contact with their water company in the last 3 months compared to those who classify themselves as in work or retired (84% and 65% vs. 53% of manual workers, 48% of those in managerial positions and 40% of those who class themselves as retired).

3.5 The C-MeX survey score

3.5.1 Quarterly weighting application

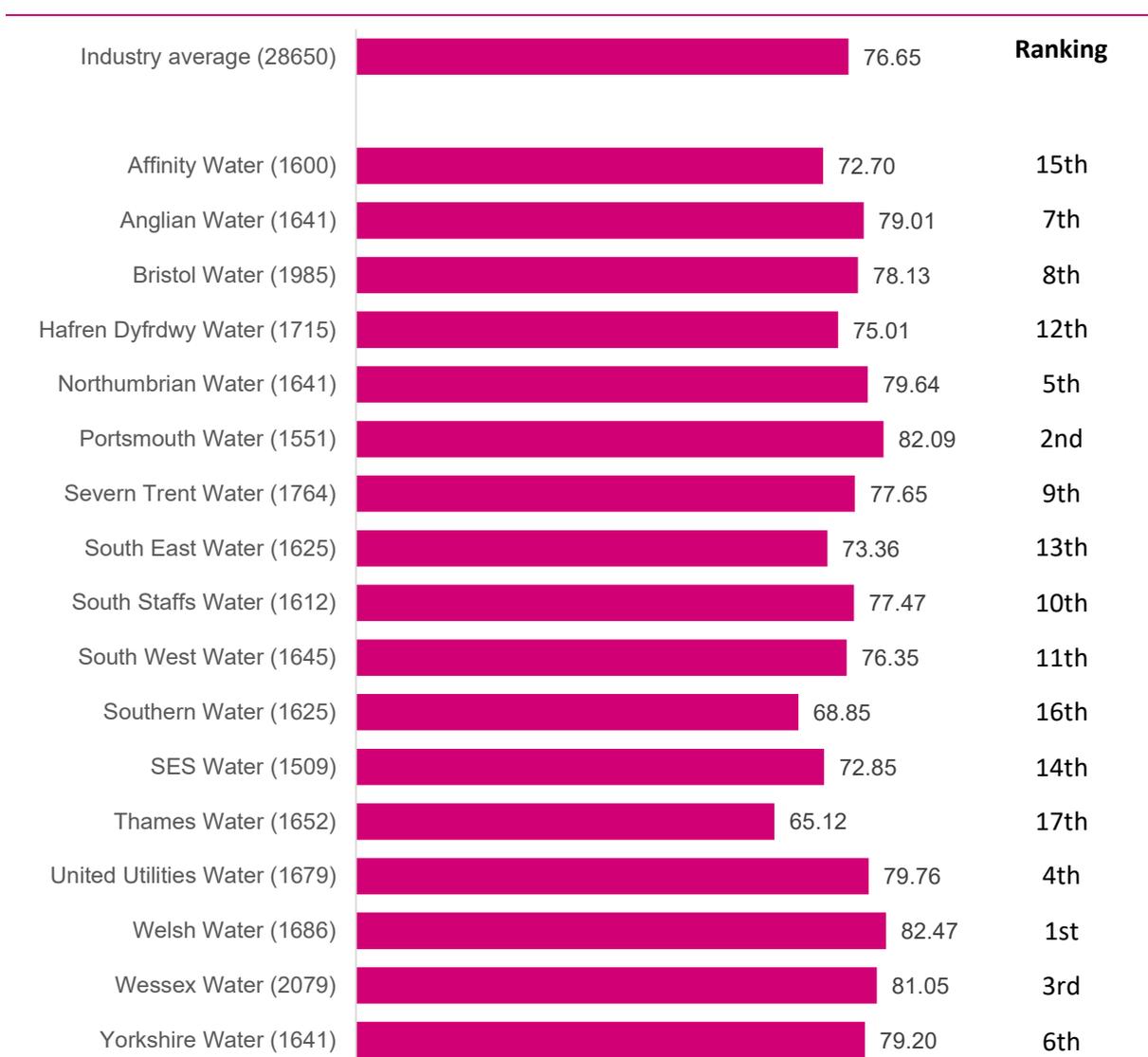
The final shadow year C-MeX survey scores have been calculated using the following formula, with the annual scores presented below based on a straight average of the four quarters of the shadow year.

$$(40\% \times \text{CSS CSAT}) + (10\% \times \text{CSS NPS}) + (40\% \times \text{CES CSAT}) + (10\% \times \text{CES NPS})$$

These scores have been calculated in line with Ofwat’s March 2019 guidance.

The industry average is 76.65, with scores ranging from 82.47 (Welsh Water) to 65.12 (Thames Water).

Figure 15: Shadow year C-MeX survey scores and rankings (Base: all – weighted)



Unweighted sample bases in parentheses. Quarterly weighting applied.

3.5.2 Annual weighting application

The full year C-MeX score has also been calculated using the same formula as above but instead utilising annual weights, the purpose being to understand the impact of applying annual weights over quarterly with everything else being held constant. For clarity, the figures in the section *C-MeX scores using quarterly weighting* are the definitive shadow year figures.

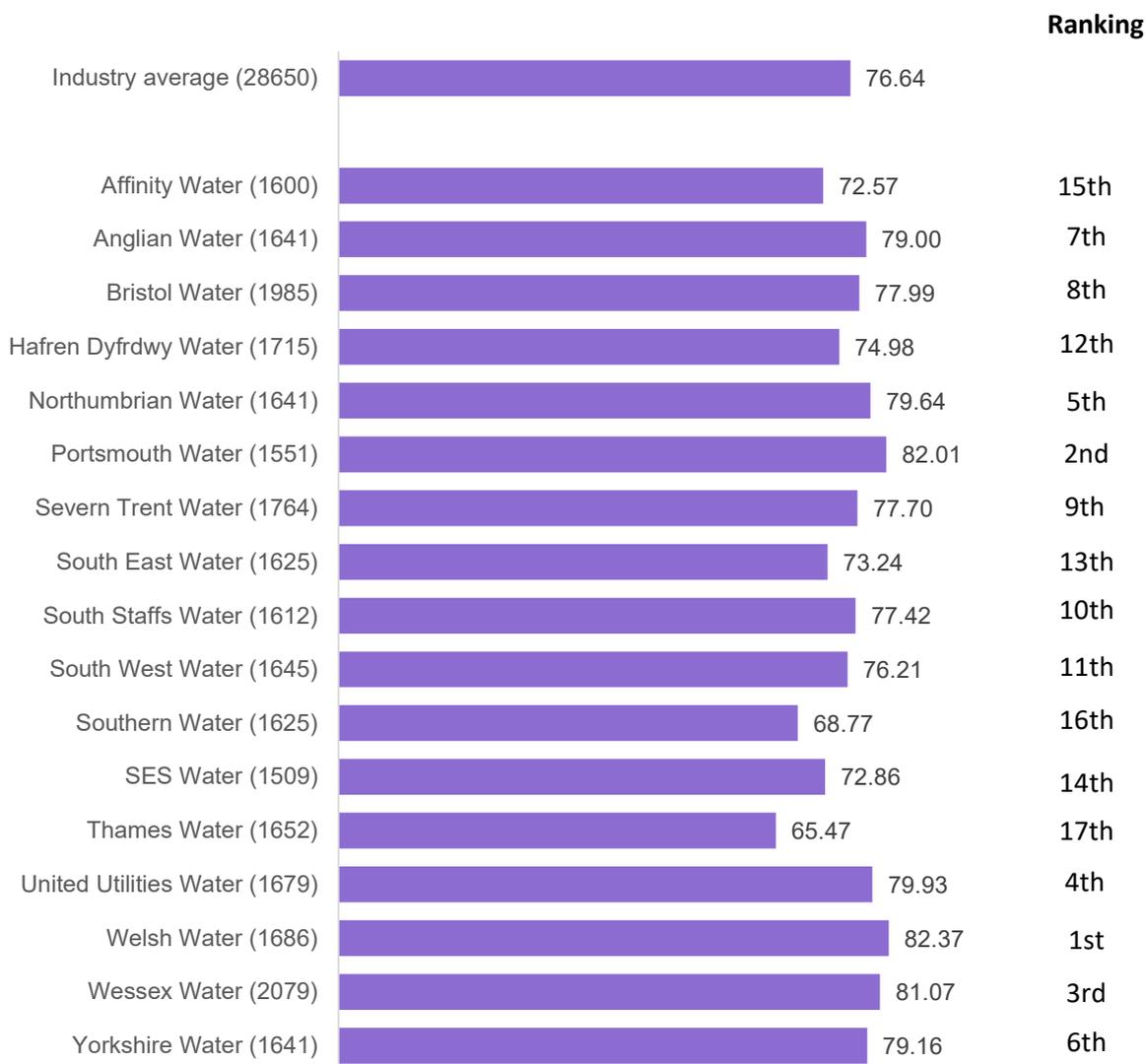
It should be noted that to annually weight data for CES it was necessary to accommodate the change in age bands between quarter 1 and quarter 2. The below Table details the approach agreed with Ofwat for the merging of these age bands.

Table 22: Age band merging for annual weighting

Quarter 1 age bands	Merging of initial age bands with new as agreed with Ofwat	Quarter 2+ age bands
18-24	All data collected for 18-24 and 50% of 25-34 assigned to 18-29 age band	18-29
25-34		30-44
35-49	50% of 25-34 and 67% of 35-49 assigned to 30-44 age band	45-64
50-64		33% of 35-49 and all 50-64 assigned to 45-64 age band
65+	All assigned to 65+ (unchanged)	65+

The Figure below provides the full year C-MeX scores with annual weights applied. As can be seen, the overall change in C-MeX score utilising annual weights is a -0.01 decrease. There are no change in ranking placements for any water company using this method of weighting.

Figure 16: Annual C-MeX survey scores and rankings (Base: all – weighted)



Unweighted sample bases in parentheses. Annual weighting applied

3.5.3 Final determinations (FD) calculation applied

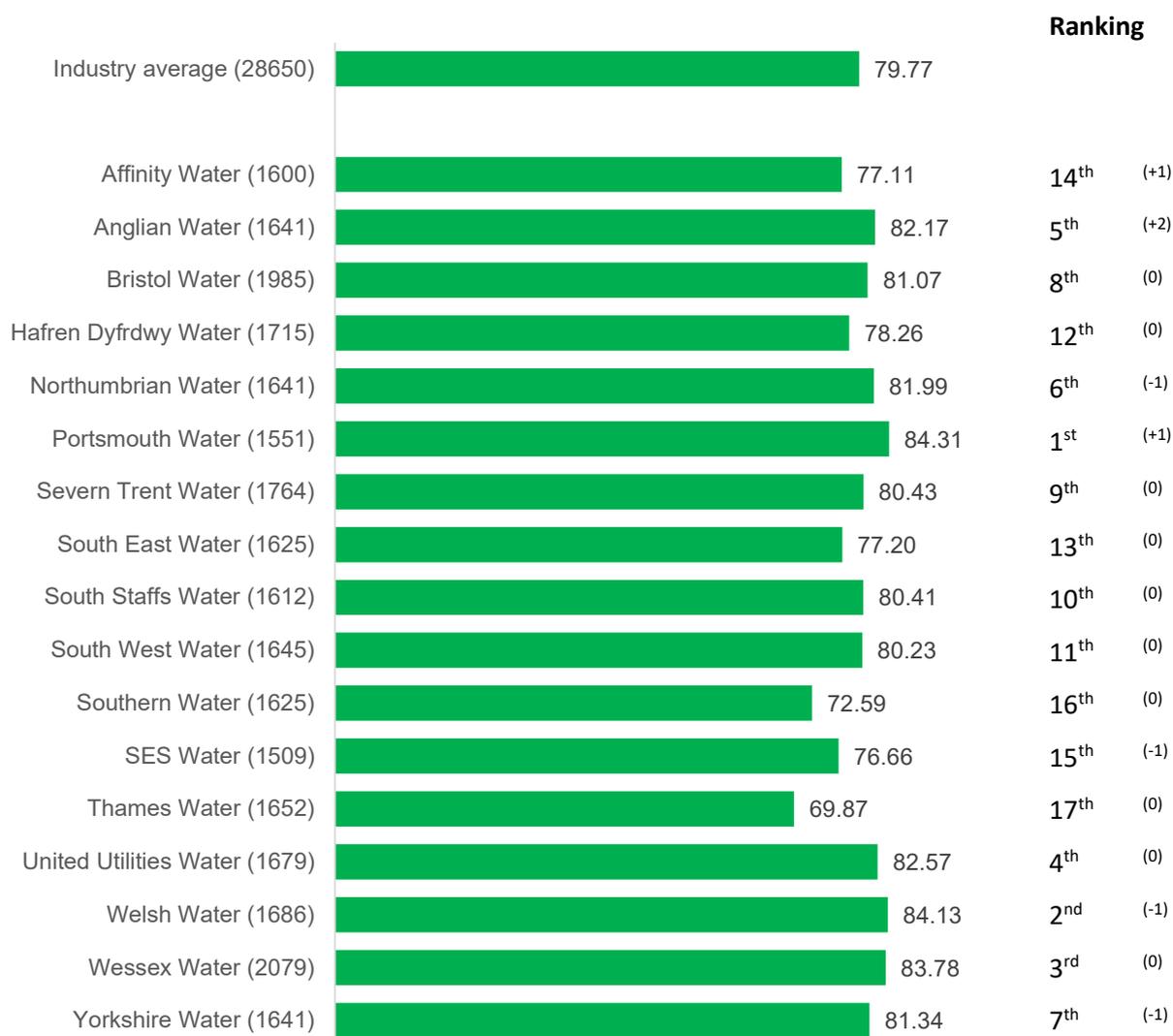
The Figure overleaf provides the full year C-MeX scores with annual weights applied and utilising the new C-MeX calculation, which removes the NPS as outlined in Ofwat's final determinations:

$$(50\% \times \text{CSS CSAT}) + (50\% \times \text{CES CSAT})$$

The Figure may be used as a potential comparator for when C-MeX comes into effect from April 2020.

The overall change in C-MeX score using the new calculation compared to the annually weighted C-MeX score *including* NPS is a +3.13 industry average increase. There are also some changes in ranking when NPS is excluded which can be identified alongside the ranks in the Figure overleaf.

Figure 17: Annual C-MeX survey scores and rankings utilising Ofwat’s FD approach for C-MeX calculations (Base: all – weighted)



Unweighted sample bases in parentheses. Annual weighting applied

4 Developer Services Measure of Experience (D-MeX)

4.1 Background

D-MeX is a new mechanism to incentivise water companies to provide an excellent customer experience for their developer services customers. D-MeX includes a monthly customer satisfaction survey amongst a random sample of developer services customers who have contacted their water company (the 'qualitative component') as well as a separate quantitative component which is outside the scope of this study.

It is a transaction driven rather than a relationship-based survey.

During the shadow year the survey yielded a monthly customer satisfaction score which was combined to produce a quarterly score. In the shadow year, the final annual D-MeX scores for the qualitative component have been calculated as a straight average of the four quarterly scores.

4.2 Research objectives

The overall objective of the shadow year was to develop D-MeX to the point where it can have financial incentives applied on an annual basis from April 2020 onwards. The D-MeX pilot, alongside Ofwat's shadow year guidance formed the basis of the research design (sample, methodologies, questionnaire, etc.) for the shadow year.

4.3 Methodology

4.3.1 Sample size and sampling

Each month companies provided a file containing *all* developer services contacts from all contact channels during the previous month for in scope Levels of Service (LoS) metrics as defined by Ofwat and detailed in [PR19 Developer Services Measure of Experience \(D-MeX\): guidance for the D-MeX shadow year 2019-2020](#).

D-MeX sample sizes comprised approximately 20% of each water company's useable contacts, with the following exceptions:

- The sample size was capped at 1,000 completed interviews over the year for any single water company (which equates to an average of c. 84 per month)
- For the three smallest water companies (in terms of number of contacts provided) we tried to achieve as many interviews as possible from the contacts available.

4.3.2 Data collection approach

The survey was administered via Computer Aided Telephone Interview (CATI).

4.3.3 Survey length and content

The survey script, as agreed with Ofwat can be found in Appendix C and lasts approximately 8 – 10 minutes. Questions include what their company did well, what they could have done better, satisfaction with aspects of service, overall satisfaction, most important aspects of service, and any other suggestions.

4.3.4 Weighting procedure

There are no weights applied to the D-MeX survey data.

4.3.5 Significance testing

Two methods of significance testing are used in this report. The following two-tailed independent tests at the 95% confidence interval have been applied to the data:

- T-test has been used to test for significant differences between percentages;
- Z-test has been used to test for significant differences between mean scores.

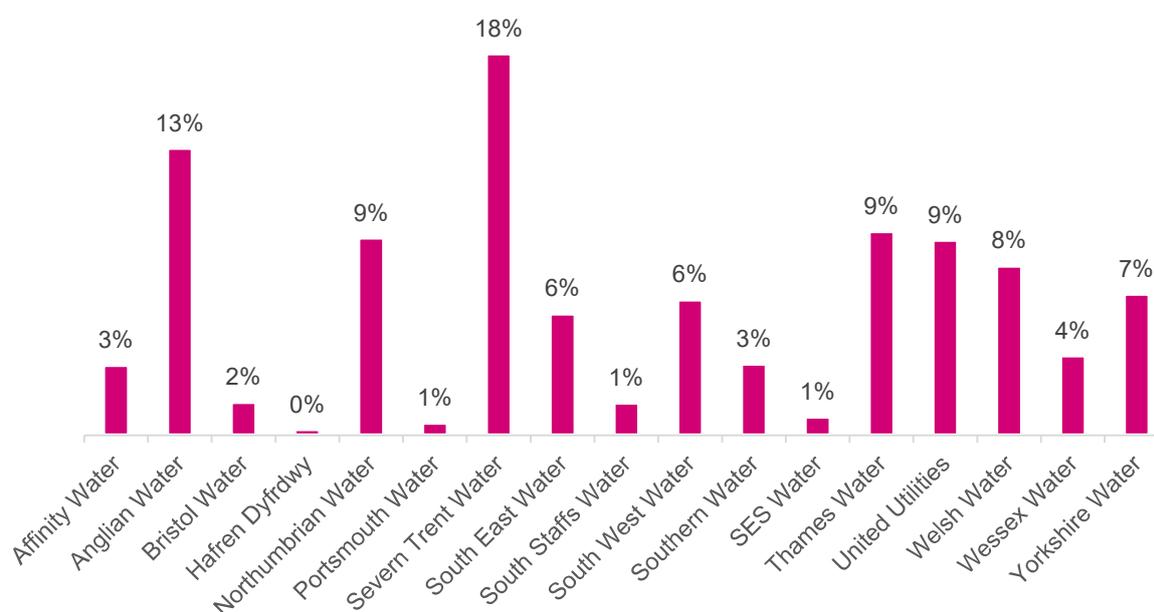
All figures that are significantly different from another have been detailed within the body of this report along with the figure they are significantly different from.

4.4 Sample quality

This section looks at the quality of the sample provided by water companies. Information such as number of records provided by water company and the proportion of useable sample is detailed.

Over the course of the shadow year, BMG took receipt of nearly 200,000 records of developer services customers across all 17 water companies. Sample volumes vary considerably between companies, Severn Trent submitted the largest proportion of contacts (18%; 33,924 contacts submitted) whereas Hafren Dyfrdwy submitted the fewest (0.3%; 514 contacts submitted). The proportion of contacts submitted each wave by each company was consistent. The proportion of submitted contacts indicate the relative size of the developer services team within each water company.

Figure 18: Share of submitted sample by water company

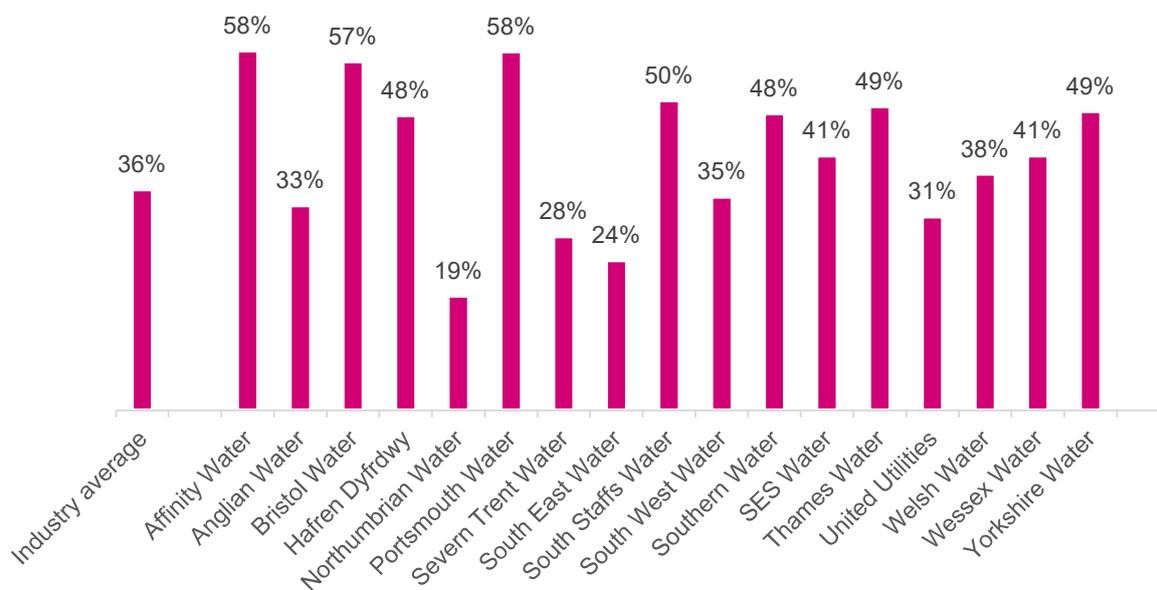


Total sample received: 191,583

To prepare received sample for fieldwork it was necessary to make certain exclusions to ensure that each contact only appears in the sample once and to remove those who have previously been contacted where the request was made to be withdrawn from any future contact. Other exclusions made included invalid contacts but these were minimal with less than 5% of contacts considered invalid (invalid number/ water metric/ date of completion. The largest proportion of exclusions were duplicate contacts; around 75% of all exclusions made.

After all valid exclusions were made, the average proportion of useable sample at industry level was around one third (36%). The proportion of useable sample ranged from 19% for Northumbrian Water to almost three fifths for Portsmouth Water and Affinity Water (58%), closely followed by Bristol Water with 57% useable sample.

Figure 19: Average proportion of useable sample by water company



Total useable sample: 68,639

Developer Services Measure of Experience (D-MeX)

The Table below details the total annual volume of useable sample by water company. Severn Trent Water has the largest useable volume of useable sample (9,571) whereas Hafren Dyfrdwy has the smallest volume of useable sample (246).

Table 23: Total annual volume of useable sample by water company

	Total useable sample
Total	68,639
Affinity Water	3,639
Anglian Water	8,477
Bristol Water	1,656
Hafren Dyfrdwy	246
Northumbrian Water	3,258
Portsmouth Water	630
Severn Trent Water	9,571
South East Water	2,627
South Staffs Water	1,443
South West Water	4,178
Southern Water	3,059
SES Water	679
Thames Water	8,934
United Utilities	5,456
Welsh Water	5,772
Wessex Water	2,921
Yorkshire Water	6,093

4.4.1 Level of Service (LoS) audit check

Each month, as well as providing sample, Ofwat required companies to send a copy of their Water UK LoS return for auditing purposes. The intention of this submission was to ensure the number of records provided for each metric tallied with the total volume of transactions completed which is reported to Water UK each month (rather than the volume delivered within the target for that metric).

As companies are required to submit all contacts for the sample month, this inevitably leads to many duplicate contacts in the submitted sample. On the whole, transactions by water metric still matched with the Water UK LoS, however there were two water metrics that did not match 100% with the Water UK LoS, these are W3.1 & W30.1. The reason for this is due to the duplicate contacts in the sample, when duplicates are removed and only unique plots remain in sample submissions the number of contacts matched the Water UK LoS.

On the whole companies were very good at submitting sample that matched their LoS and where queries were raised explanations were provided or inaccuracies were acknowledged and rectified promptly.

The LoS audit check is a worthwhile process as it is believed that sample submissions are still a manual process for most companies and for this reason, it is possible that mistakes do happen. This process helps to identify and rectify inaccuracies quickly and ensure that the right contacts are loaded each month.

4.5 Research findings

The findings in this section are reported on annually aggregated figures for all companies. The total sample size is 12,002 across all 17 water companies. A breakdown of sample sizes can be found in parentheses in charts where data has been reported with a water company breakdown.

4.5.1 What companies are doing well

All respondents were given the opportunity to state what they thought companies did well in relation to handling their transaction. Speed of response and communication are the top mentions amongst developer services customers, mentioned by 18% and 12% respectively.

Table 24: What developer services do well (mentions >2%) (Base: all – unweighted)

	%
Speed of response	18%
Good communication	12%
They were fine/ok	7%
Everything	7%
Friendly/helpful staff/engineers/contractors	6%
Site visits	6%
Sorted the issue/did the job	6%
Provided good/relevant information/advice	6%
Handled it quickly	6%
Did a quality job	5%
Efficient/well organised	5%
They were helpful/supportive	4%
Simple/straightforward process	4%
Good service/customer service	4%
Hassle free/no problems	4%
Met the deadline	4%
Punctual	3%
Great/fantastic/excellent	3%

4.5.2 Areas for improvement

Respondents were also given the opportunity to articulate what developer services could have done better in relation to their transaction.

By contrast, being able to respond quicker to queries is also an area that is felt could be improved, as well improving communication/being kept informed, mentioned by 19% and 11% respectively.

Table 25: What developer services could do better (mentions >2%) (Base: all – unweighted)

	%
Speed of response/quicker response to queries	19%
Better communication/kept informed	11%
Pricing/cost (reduction)	8%
Better management of work/improved workmanship (inspection, coordination of work)	6%
Given a full explanation/more information/answers/advice	5%
Easier to get hold of/contact (incl. get to the right person)	3%

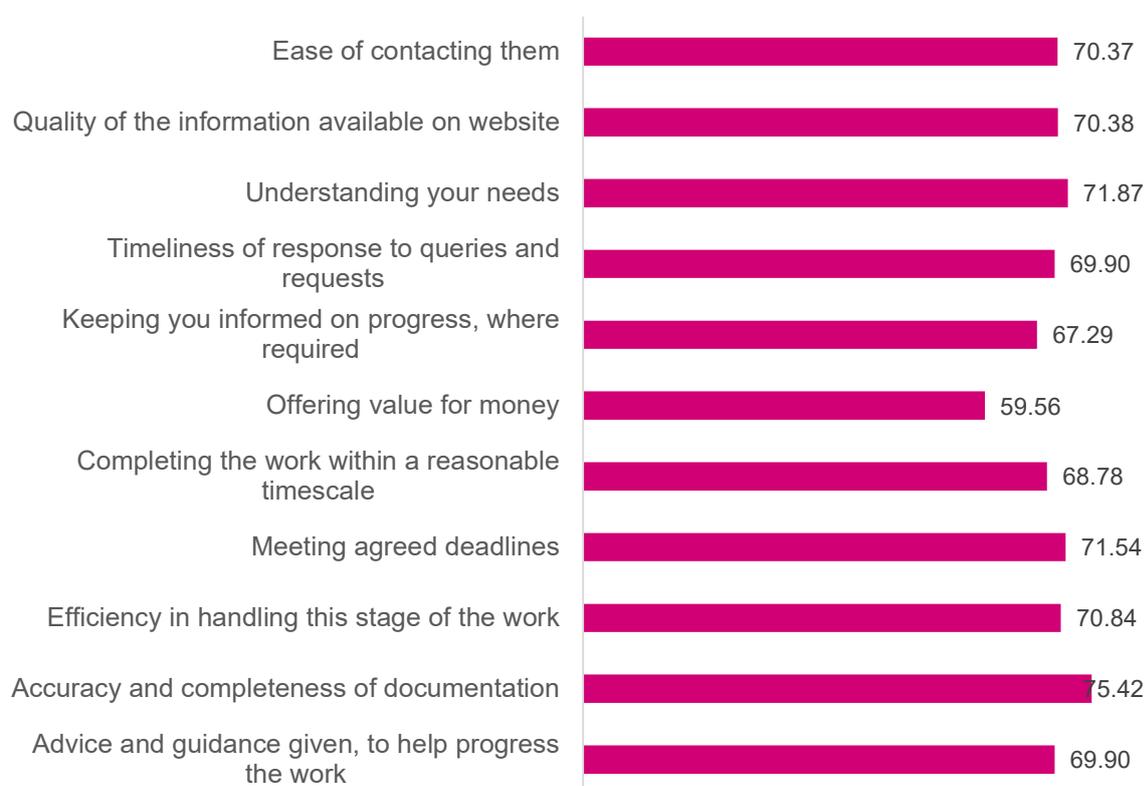
Developer Services Measure of Experience (D-MeX)

4.5.2.1 Satisfaction with aspects of service

Respondents were asked to consider the developer services team they used in relation to their transaction and to rate them on a number of different aspects of service and rate each on a scale from 0 – 10 where 0 is extremely dissatisfied and 10 is extremely satisfied.

As can be seen in the Figure below, developer services customers are most satisfied with the accuracy and completeness of documentation with an average score of 75.42 out of 100, this is followed by the understanding of their needs and by meeting agreed deadlines (71.87 and 71.54 respectively). Details of water company performance on each of these aspects of service can be found below this Figure in subsequent Figures.

Figure 20: Satisfaction with aspects of service (Base: all – unweighted)

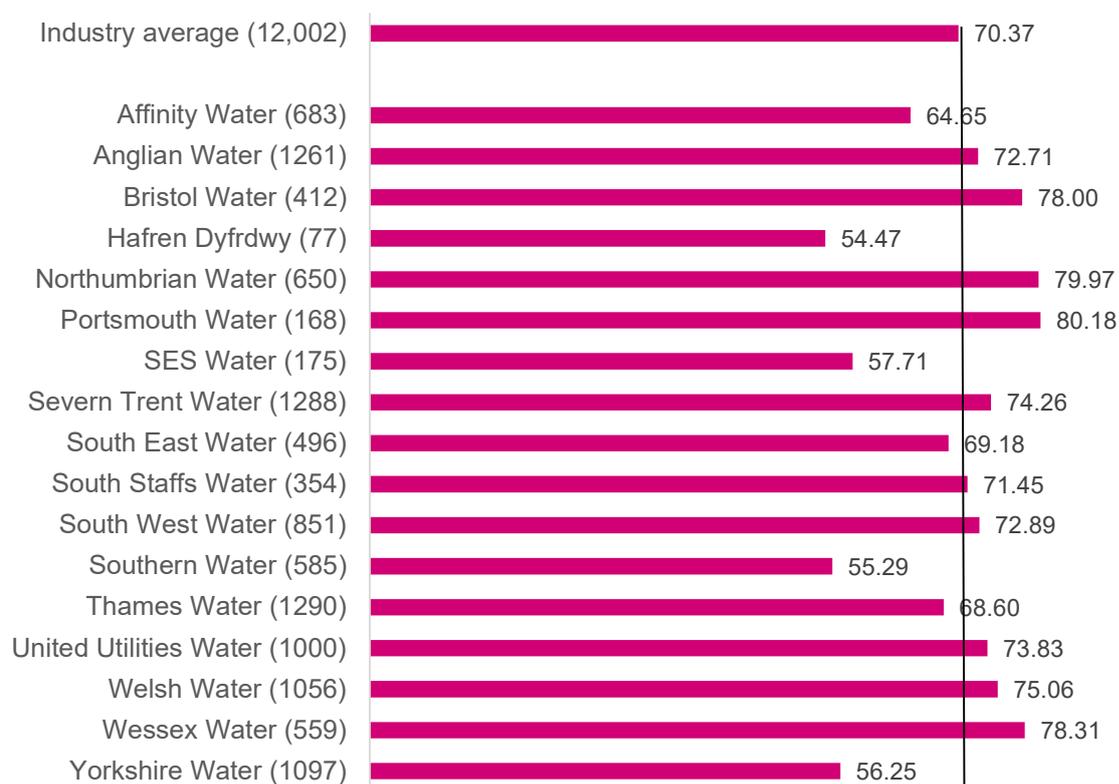


Unweighted sample base: 12,002

4.5.2.2 Ease of contacting them

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to ease of contact, 80.18 and 79.97 respectively. Hafren Dyfrdwy and Southern Water customers are least satisfied in this respect, 54.47 and 55.29 respectively.

Figure 21: Ease of contact by water company (Base all – unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Welsh Water
- Wessex Water

Developer Services Measure of Experience (D-MeX)

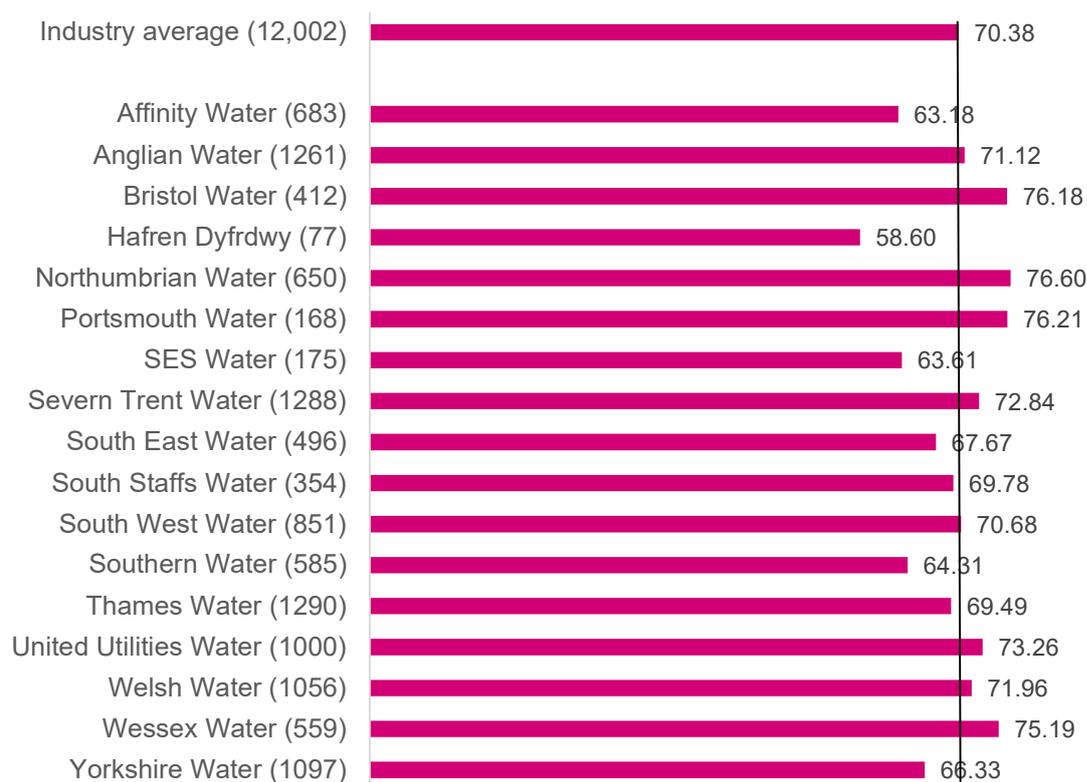
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.3 The quality of the information available on their website

Customers of Northumbrian Water and Portsmouth Water developer services are most satisfied with respect to the quality of the information available on the water company website, 76.60 and 76.21 respectively. Hafren Dyfrdwy, Affinity Water and SES Water customers are least satisfied in this respect, 58.60, 63.18 and 63.61 respectively.

Figure 22: The quality of the information available on their website (Base all – unweighted)



Unweighted sample bases in parentheses

C-MeX and D-MeX shadow year research report for PR19

The following companies are significantly higher than the industry average:

- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- United Utilities Water
- Wessex Water

The following companies are significantly lower than the industry average:

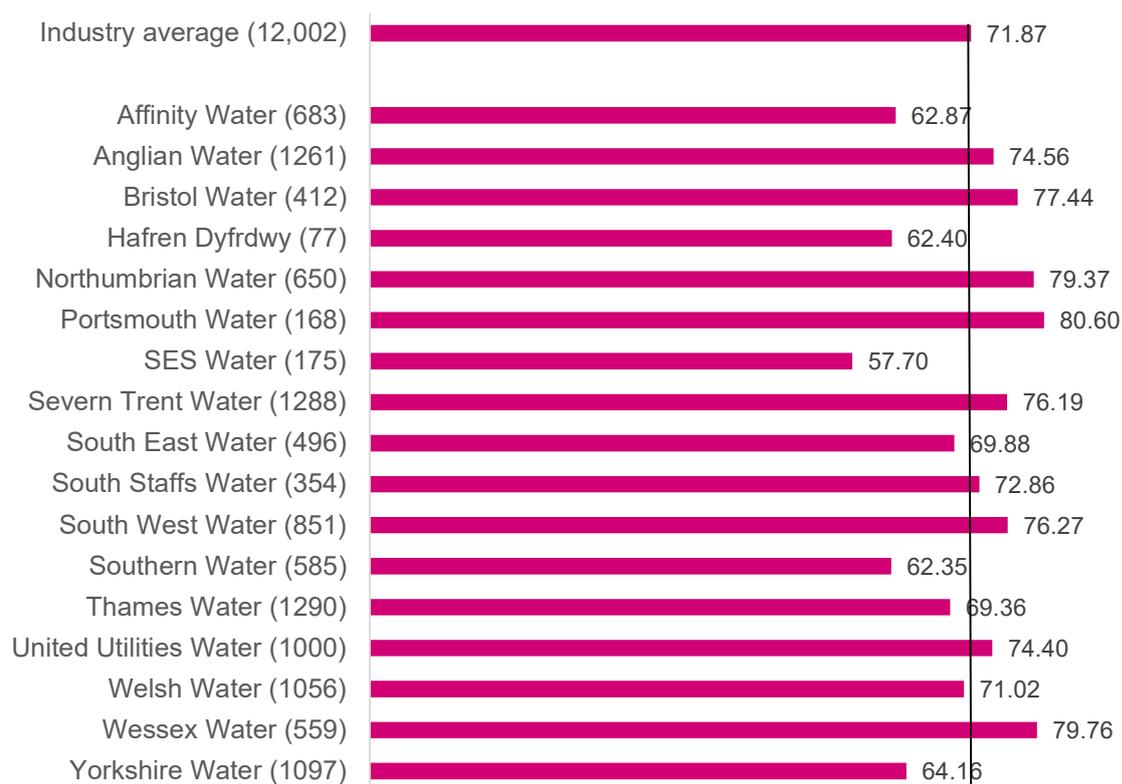
- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Affinity Water
- Yorkshire Water

Developer Services Measure of Experience (D-MeX)

4.5.2.4 Understanding your needs

Customers of Portsmouth Water and Wessex Water developer services are most satisfied with respect to the water company understanding their needs, closely followed by Northumbrian Water, 80.60, 79.76 and 79.37 respectively. SES Water, Southern Water and Hafren Dyfrdwy customers are least satisfied in this respect, 57.70, 62.35 and 62.40 respectively.

Figure 23: Understanding your needs (Base all – unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Wessex Water

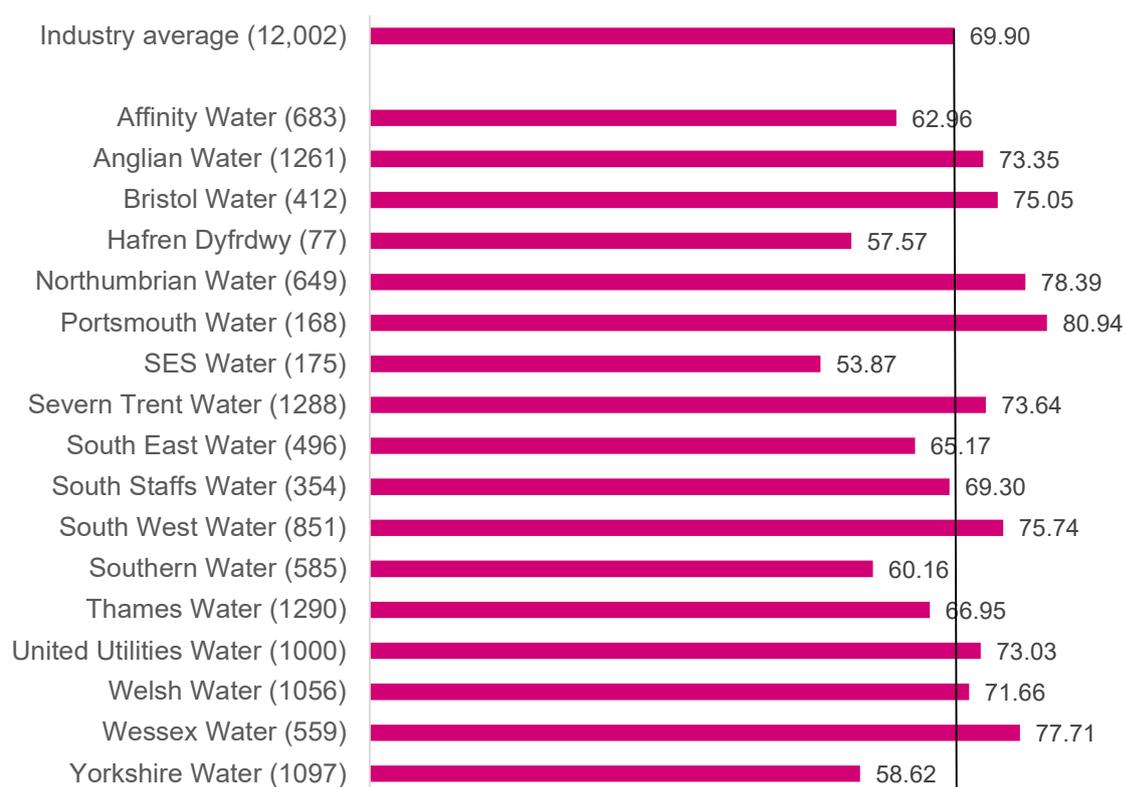
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.5 Timeliness of response to queries and requests

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to the timeliness of response to queries and requests 80.94 and 78.39 respectively. SES Water and Hafren Dyfrdwy customers are least satisfied in this respect, 53.87 and 57.57 respectively.

Figure 24: Timeliness of response to queries and requests (Base all – unweighted)



Unweighted sample bases in parentheses

Developer Services Measure of Experience (D-MeX)

The following companies are significantly higher than the industry average:

- Anglian Water
- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Welsh Water
- Wessex Water

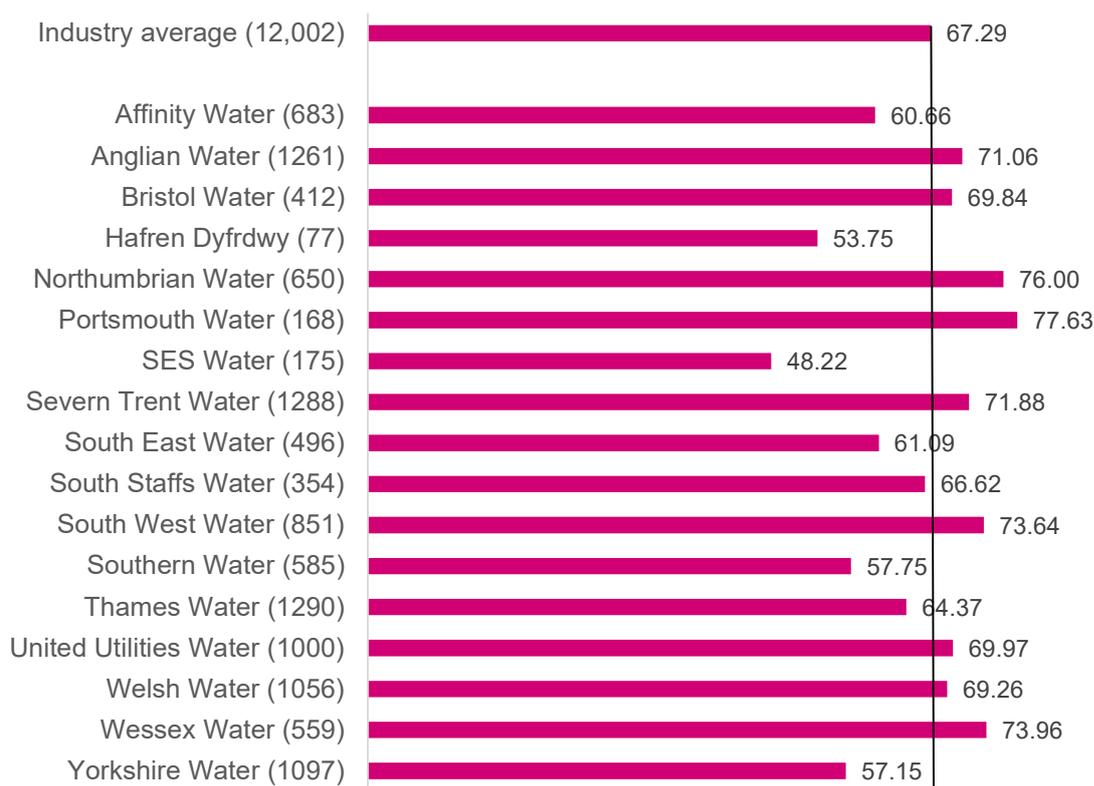
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.6 Keeping you informed on progress, where required

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to being kept informed on progress where required, 77.63 and 76.00 respectively. SES Water and Hafren Dyfrdwy customers are least satisfied in this respect, 48.22 and 53.75 respectively.

Figure 25: Keeping you informed on progress, where required (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Welsh Water
- Wessex Water

Developer Services Measure of Experience (D-MeX)

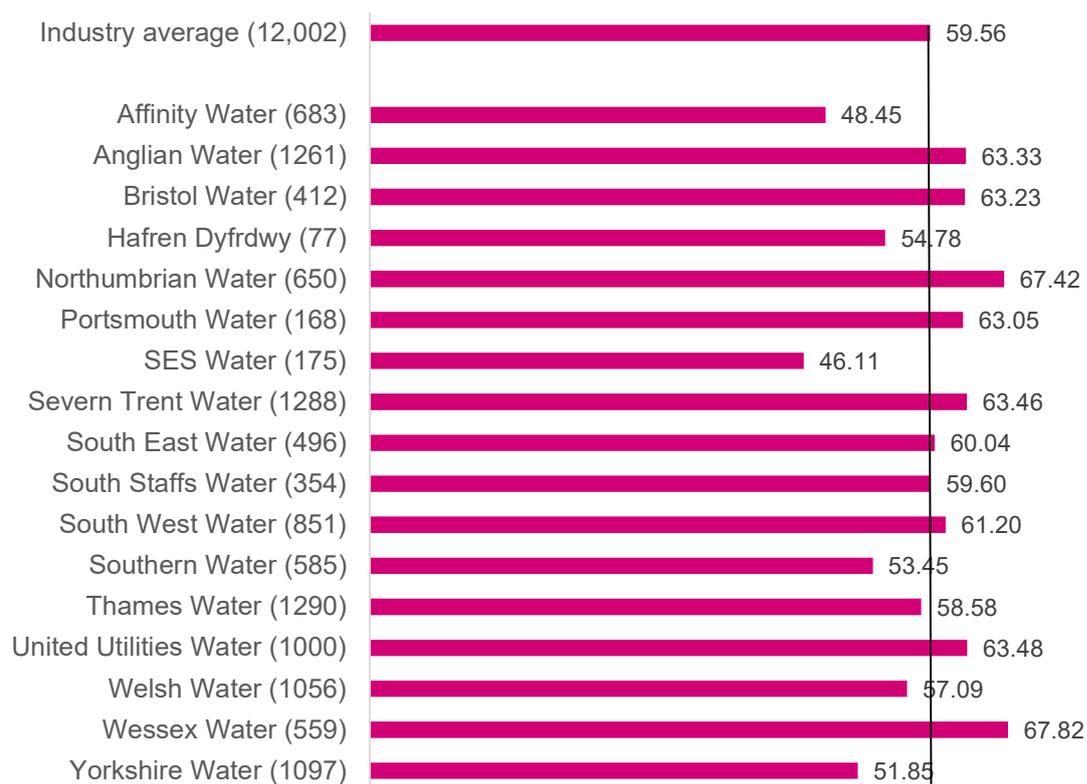
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.7 Offering value for money

Customers of Wessex Water and Northumbrian Water developer services are most satisfied with respect to value for money, 67.82 and 67.42 respectively. SES Water and Affinity Water customers are least satisfied in this respect, 46.11 and 48.45 respectively.

Figure 26: Offering value for money (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Bristol Water
- Northumbrian Water
- Severn Trent Water
- United Utilities Water
- Wessex Water

The following companies are significantly lower than the industry average:

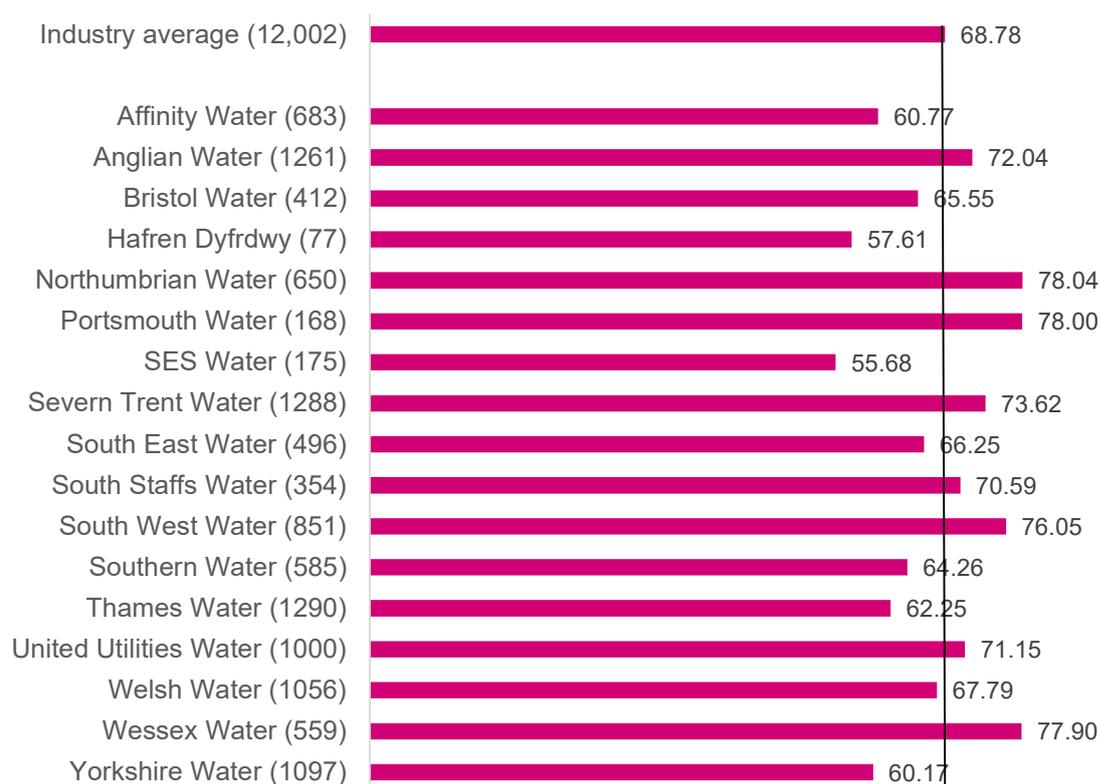
- Hafren Dyfrdwy
- Southern Water
- SES Water
- Affinity Water
- Welsh Water
- Yorkshire Water

Developer Services Measure of Experience (D-MeX)

4.5.2.8 Completing the work within a timescale that is reasonable

Customers of Northumbrian Water and Portsmouth Water developer services are most satisfied with respect to completing the within a timescale that is reasonable, 78.04 and 78.00 respectively. SES Water and Hafren Dyfrdwy customers are least satisfied in this respect, 55.68 and 57.61 respectively.

Figure 27: Completing the work within a timescale that is reasonable (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Wessex Water

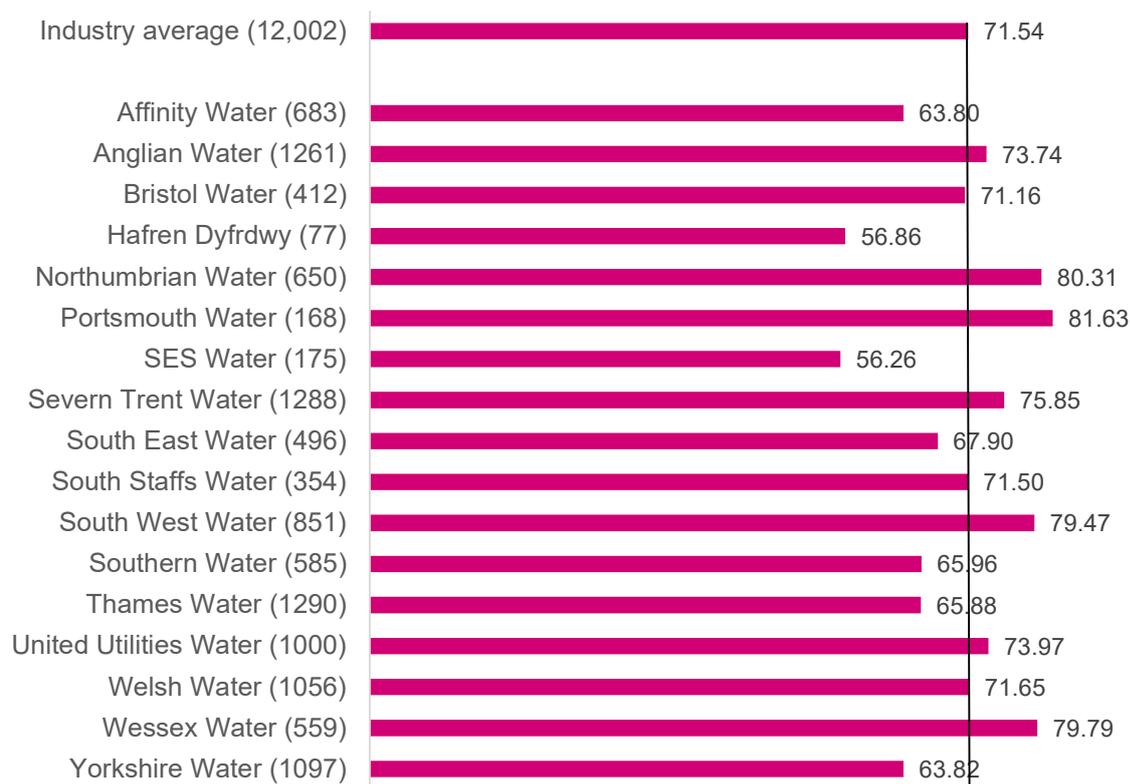
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.9 Meeting agreed deadlines

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to meeting agreed deadlines, 81.63 and 80.31 respectively. SES Water and Hafren Dyfrdwy customers are least satisfied in this respect, 56.26 and 56.86 respectively.

Figure 28: Meeting agreed deadlines (Base all - unweighted)



Unweighted sample bases in parentheses

Developer Services Measure of Experience (D-MeX)

The following companies are significantly higher than the industry average:

- Anglian Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Wessex Water

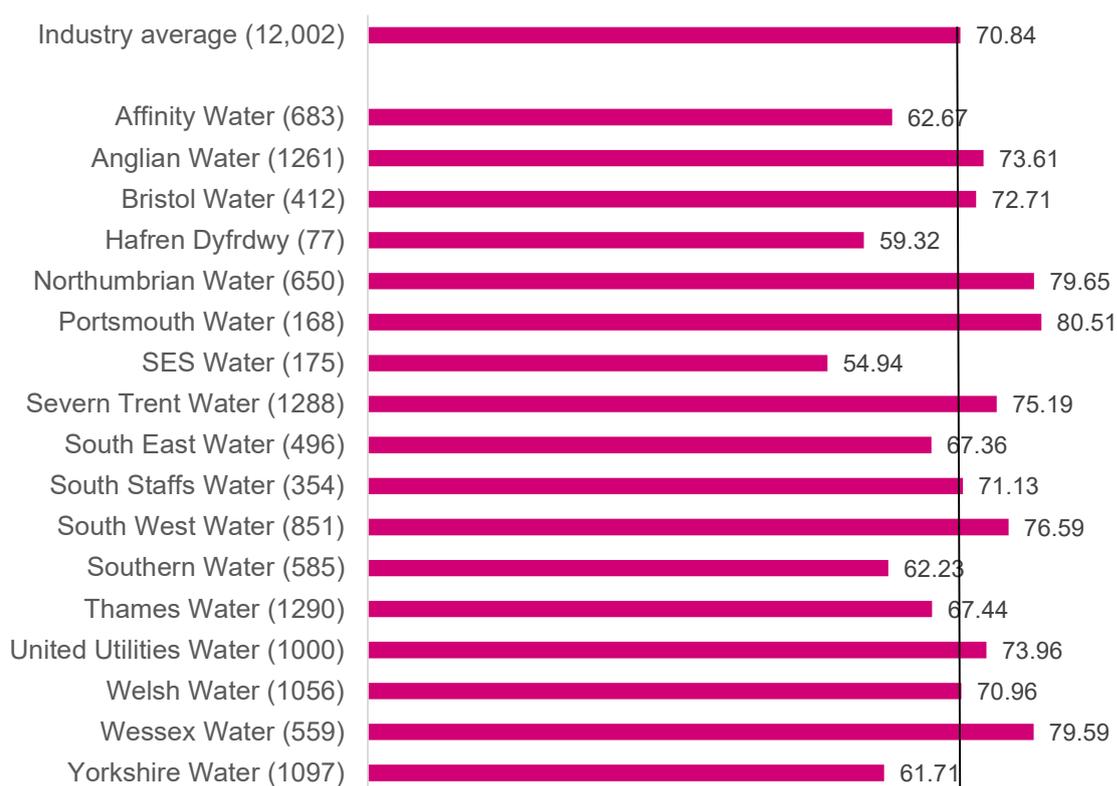
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.10 Efficiency in handling this stage of the work

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to the efficiency in handling their stage of work, 80.51 and 79.65 respectively. SES Water and Hafren Dyfrdwy customers are least satisfied in this respect, 54.94 and 59.32 respectively.

Figure 29: Efficiency in handling this stage of the work (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Wessex Water

Developer Services Measure of Experience (D-MeX)

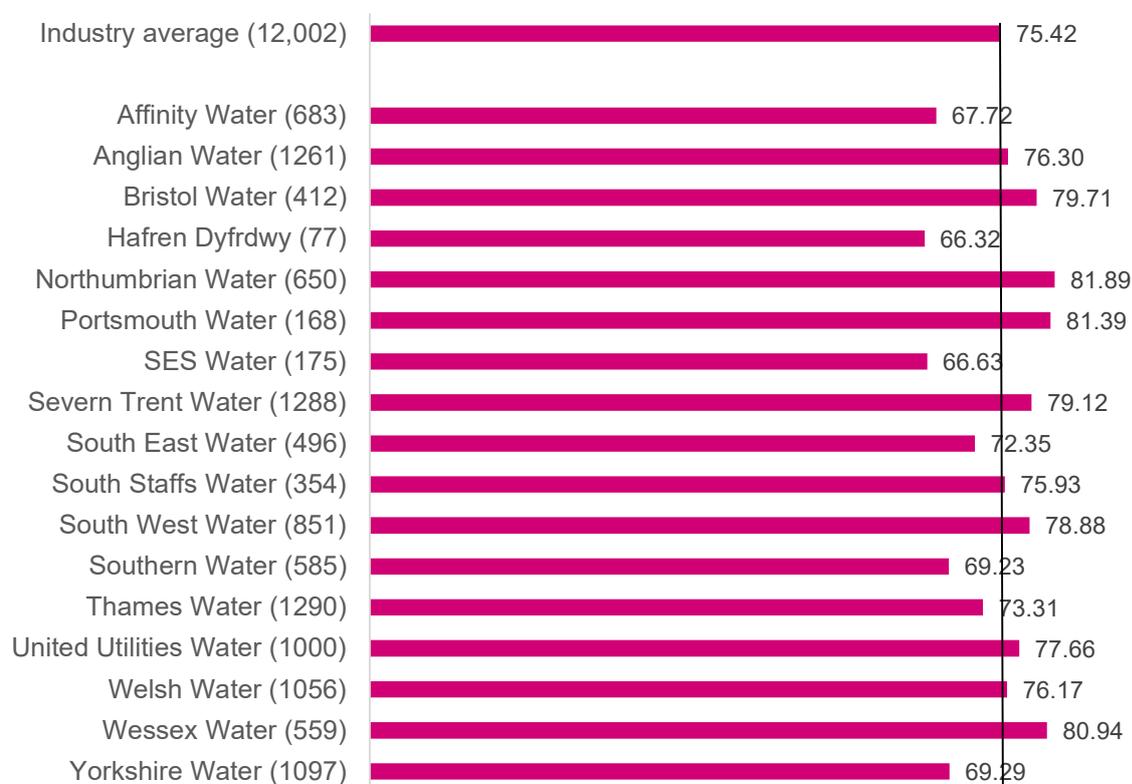
The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

4.5.2.11 Accuracy and completeness of any documentation provided

Customers of Northumbrian Water and Portsmouth Water developer services are most satisfied with respect to the accuracy and completeness of any documentation provided, for example quotations, plans, reports etc with a satisfaction score of 81.89 and 81.39 respectively. Hafren Dyfrdwy and SES Water customers are least satisfied in this respect, 66.32 and 66.63 respectively.

Figure 30: Accuracy and completeness of any documentation provided (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- United Utilities Water
- Wessex Water

The following companies are significantly lower than the industry average:

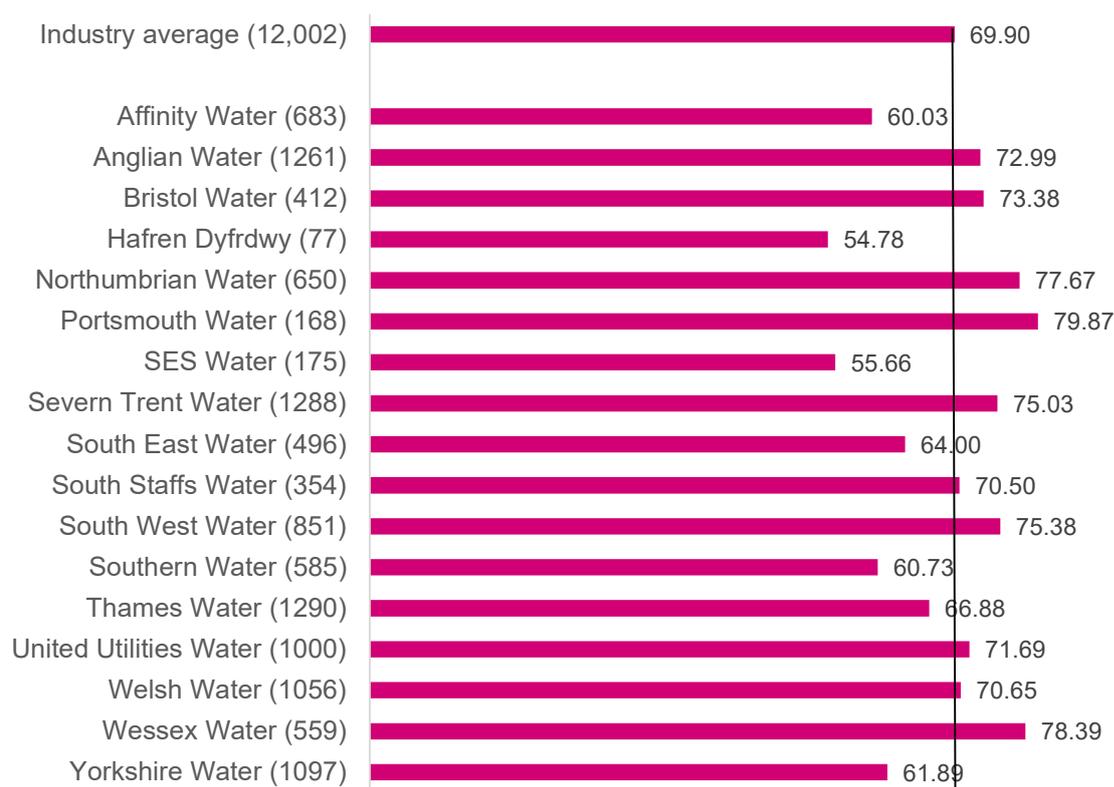
- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

Developer Services Measure of Experience (D-MeX)

4.5.2.12 Any advice and guidance given, to help progress the work

Customers of Portsmouth Water and Northumbrian Water developer services are most satisfied with respect to any advice and guidance given, to help progress the work, 79.87 and 77.67 respectively. Hafren Dyfrdwy and SES Water customers are least satisfied in this respect, 54.78 and 55.66 respectively.

Figure 31: Any advice and guidance given, to help progress the work (Base all - unweighted)



Unweighted sample bases in parentheses

The following companies are significantly higher than the industry average:

- Anglian Water
- Bristol Water
- Northumbrian Water
- Portsmouth Water
- Severn Trent Water
- South West Water
- Wessex Water

The following companies are significantly lower than the industry average:

- Hafren Dyfrdwy
- South East Water
- Southern Water
- SES Water
- Thames Water
- Affinity Water
- Yorkshire Water

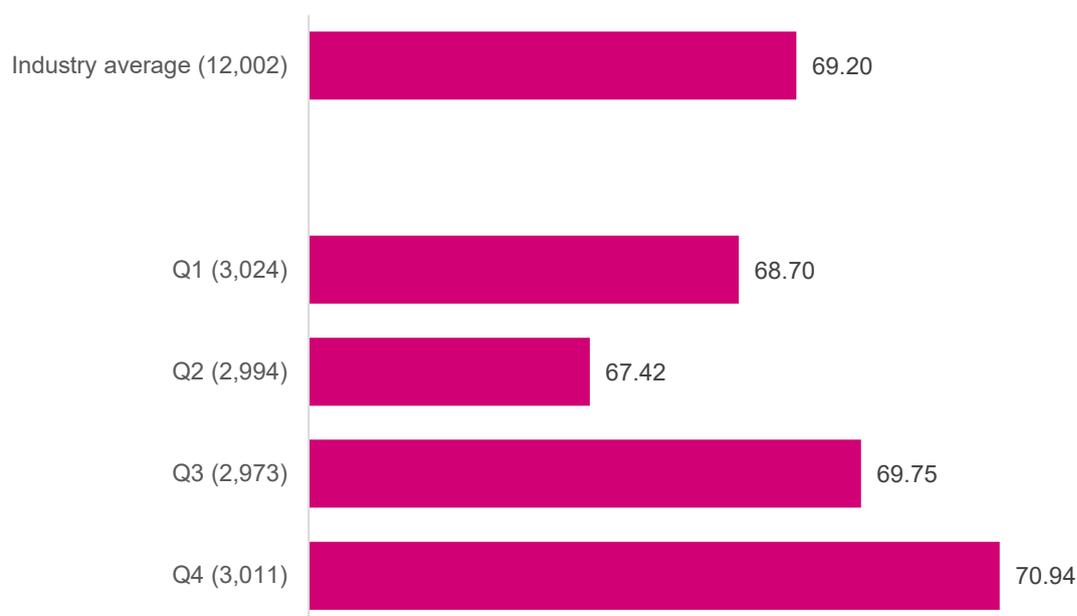
4.5.3 Industry satisfaction results

After considering all of the different aspects of service provision the developer services team provide, respondents were asked to rate their overall satisfaction with how the water company handled their transaction, using the same scale of 0 – 10.

As detailed in section 4.1 *Background*, overall satisfaction is based on a straight average over each of the 4 quarters of shadow year data. League tables were produced each quarter for Ofwat to understand where companies were positioning relatively to one another throughout the year and the overall mean satisfaction scores produced is a straight average of these quarterly scores.

Out of a score of 100, the industry average for overall satisfaction is 69.20. The Figure below details the mean score satisfaction overall and by quarter. All significant differences are highlighted in the text below the Figure.

Figure 32: Overall satisfaction (Base all – unweighted)



Unweighted sample bases in parentheses

Developer Services Measure of Experience (D-MeX)

Overall, the industry satisfaction level seen in quarter 3 is significantly higher than in quarter 2 (69.75 and 67.42 respectively). Quarter 4 displays the highest level of satisfaction and this is significantly higher than that seen in quarter 1 and in quarter 2 (70.94 vs. 68.70 and 67.42 respectively).

The following Table ranks all water companies with respect to where they sit in relation to each other based on their overall mean satisfaction with transaction handling.

Northumbrian Water and Portsmouth Water have the highest satisfaction levels, 78.18 and 78.05 respectively whilst SES Water and Hafren Dyfrdwy have the lowest levels of satisfaction, 53.87 and 59.43 respectively.

Table 26: Overall satisfaction with transaction handling by company (Base: all – unweighted)

Water company	Overall satisfaction	Rank	Significantly different from the average
Northumbrian Water	78.18	1	↑
Portsmouth Water	78.05	2	↑
Wessex Water	77.89	3	↑
South West Water	74.43	4	↑
Severn Trent Water	73.63	5	↑
Bristol Water	73.58	6	↑
Anglian Water	72.09	7	↑
United Utilities Water	72.03	8	
South Staffs Water	69.12	9	
Industry average	69.20		
Welsh Water	69.06	10	
Thames Water	65.98	11	↓
South East Water	65.37	12	↓
Affinity Water	60.39	13	↓
Yorkshire Water	60.34	14	↓
Southern Water	60.18	15	↓
Hafren Dyfrdwy	59.43	16	↓
SES Water	53.87	17	↓

4.5.3.1 *Annually aggregated average*

It should be noted that base sizes are low for some companies on a quarterly basis meaning scores are vulnerable to volatility and a particularly good or bad performance in a quarter can impact the annual straight average.

Overall satisfaction scores have been produced using aggregated data over all 12 months of the shadow year to show the difference in mean score using this approach compared with a straight average calculation for each company. The table overleaf details the annual mean scores for each company using aggregation as well as the deviation, if any, from their average when calculated using the straight average.

As can be seen, Hafren Dyfrdwy's mean score is -1.90 lower when aggregating over the 12 months, this is because performance in Q4 was exceptionally high which increased the straight average but averaging Q4's performance over 12 months reduces its influence on the overall average.

Developer Services Measure of Experience (D-MeX)

Table 27: Annually aggregated satisfaction score and deviation from straight average satisfaction score and ranking

Water company	Overall satisfaction	Difference from annually aggregated satisfaction score	Difference in rank
Industry average	69.20	0.00	-
Affinity Water (683)	60.44	0.05	0
Anglian Water (1261)	72.10	0.01	0
Bristol Water (412)	73.01	-0.57	0
Hafren Dyfrdwy (77)	57.53	-1.90	0
Northumbrian Water (650)	78.18	0.00	-1
Portsmouth Water (168)	78.28	0.23	+1
SES Water (175)	53.16	-0.71	0
Severn Trent Water (1288)	73.82	0.19	0
South East Water (496)	65.49	0.12	0
South Staffs Water (354)	69.20	0.08	0
South West Water (851)	74.47	0.04	0
Southern Water (585)	60.33	0.15	+1
Thames Water (1290)	66.06	0.08	0
United Utilities Water (1000)	72.00	-0.03	0
Welsh Water (1056)	69.05	-0.01	0
Wessex Water (559)	77.91	0.02	0
Yorkshire Water (1097)	60.29	-0.05	-1

4.5.4 Most important aspects of service to customers

All respondents were asked to think more generally about dealing with the water company's Developer Services team and to state what they would personally say are the most important things they look for in terms of how the service is delivered. The most important aspect for developer services customers is speed of response (40%). This is followed by almost one in three stating keeping the customer up to date (32%) and providing value for money (25%).

Table 28: Most important aspects of service to customers (mentions >2%) (Base all - unweighted)

	%
Speed of response	40%
Good communication/keeping customer up to date	32%
Pricing/value for money	25%
Clear/detailed information/explanations/advice	17%
Ease of contact/getting to the right person	14%
Sticking to deadlines	9%
Efficiency/being organised	9%
Accuracy of plans/information	8%
An account manager/ direct point of contact	7%
Quicker resolution of queries	7%
Quality of the work	5%
Customer service/staff attitude	5%
Good understanding of our business needs	4%
Punctuality/turn up on time	4%
Knowledgeable staff	4%
Site visit/Meeting	4%
Easy/simple/straightforward process	4%
Online services/website	3%
Resolution of queries	3%
Keeping promises/do what they say	3%
Helpful	3%

4.5.5 Customer view on how to make the interaction easier

All respondents were also asked to suggest one thing that the Developer Services team could do, that would have most impact on how easy you find them to deal with. As identified in the Table below, having a single point of contact was most likely to be mentioned as a way to make the interaction easier with the Developer Services team (13%). This is followed by better communication and timeliness of response (10% and 8% respectively).

Table 29: How to make the interaction easier (Base all – unweighted)

	%
Single point of contact/direct contact (incl. phone numbers)	13%
Better communication/responsive	10%
Timeliness of response to queries and requests	8%
Ease of contact/answer the phone	7%
Improve website/online services	6%
Pricing/cost	4%
Clear/detailed information	4%

5 Appendix A: CSS survey scripts

Telephone survey script

INTERVIEWER TO READ OUT ALL SCRIPT AS IT APPEARS:

Good morning/afternoon/evening, I am and I am calling on behalf of Ofwat, the economic regulator of the water sector in England and Wales from BMG Research.

Ofwat would like your help in understanding how water and sewerage companies deal with their customers. I understand that someone on this number has been in contact with **[Water Company Name]** and we would like to ask you a few questions about the service you received.

This information will be used to help Ofwat understand how **[Water Company Name]** is performing. The survey will take around 5 minutes to complete.

Your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website.

INTERVIEWER TO DETERMINE IF RESPONDENT WANTS WEBSITE ADDRESS BEFORE PROVIDING IT OR IF IT IS TO BE SENT VIA EMAIL (www.bmgresearch.co.uk/privacy)

Please note that this call may be monitored or recorded for training purposes.

IF NECESSARY:

- You have been selected at random from customers contacting [Water Company Name].
- Ofwat's privacy notice can be accessed using this link: www.ofwat.gov.uk/privacy-statement

ASK Can I confirm that you are happy to participate in the survey?

Record on script: YES/NO

ALL. S/C

Q1a Firstly, can I confirm that you were the person who was in contact with [Water Company Name]?

Yes	1
No	2

IF Q1a=NO. S/C

Q1b Can I speak to the person who was in contact with [Water Company Name] please?

Yes	1	Wait for person and then repeat introduction
No, they are unavailable	2	Make an appointment to call back when the person is available or log another appropriate call outcome
No one has contacted the company	3	Thank and close
Refused	4	Thank and close – log call outcome as refused

ALL. S/C

Q2 Could I just check, was this contact in regard to [Water Company] supplying you as a domestic water user?

Yes	1	Continue
No	2	Thank and Close: Thank you for your time but we are only including domestic customers in this survey

ALL. O/R

Q3 What did you contact [Water Company Name] about on [insert date]? **PROBE FULLY**

IF REASON GIVEN DIFFERS FROM SAMPLE, PROMPT WITH DATE OF CONTACT AND REASON FOR CONTACT (IF AVAILABLE) AND ASK IF ALSO CALLED ABOUT SAMPLE REASON. IF SO, INTERVIEW ON THIS; IF NOT INTERVIEW ON STATED REASON. ENSURE RESPONDENT IS THINKING ABOUT WATER COMPANY INDICATED IN SAMPLE. IF RESPONDENT CONFUSED AT ALL ABOUT WHICH ORGANISATION THEY CONTACTED THANK & CLOSE

Respondent confused

ALL. S/C

Q4 Could you confirm how you had contact with **[Water Company Name]** on this occasion **[insert date]**? **PROBE AS NECESSARY**

I telephoned them	1
I wrote them a letter	2
I emailed them	3
I contacted them through a form on their website	4
I contacted them through 'live chat' on their website	5
I contacted them by text	6
I contacted them through social media (eg Twitter/Facebook/Instagram)	7
I contacted them through an app	8
I visited the water company in person	9
I completed a transaction through my online water company account	10
Other - specify	95
Don't know	97

ALL. S/C

Q5 Do you consider the matter you contacted **[Water Company Name]** about fully resolved?

Yes	1
No	2
Don't know	3
Refused	4

ALL. S/C

Q6a Taking everything into account how satisfied are you with your recent experience with **[Water Company Name]**? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied.

0 = extremely dissatisfied	1	2	3	4	5	6	7	8	9	10 = extremely satisfied	Dk/ Refused
----------------------------	---	---	---	---	---	---	---	---	---	--------------------------	-------------

ALL. O/R

Q6b Why do you say this? **PROBE VERY FULLY**

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q7a If you could choose your water provider, based on your recent experience, how likely would you be to recommend [Water Company] to friends or family? Please use a scale of 0-10, where 0 = not at all likely and 10 = extremely likely.

0 = not at all likely	1	2	3	4	5	6	7	8	9	10 = extremely likely	Dk/ Refused
-----------------------	---	---	---	---	---	---	---	---	---	-----------------------	-------------

ALL. O/R

Q7b Why do you say this? **PROBE VERY FULLY**

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q8 Whilst this survey is being carried out on behalf of Ofwat, we share your feedback with **[Water Company]** for it to improve its customer service. Please let us know if you object to us sharing our written record of your feedback including your name and contact details for this purpose? If you would like more information about how the water companies process your personal data, please refer to their privacy policy.
Do you object or not object?

Object	1
Do not object	2

IF Q8=OBJECT, READ OUT:

In that case your responses will only be passed on to **[Water Company Name]** in aggregated data and will not be linked to you personally.

IF Q8=NOT OBJECT

Q9 In some cases, [Water Company] may contact you to discuss any issues included in your feedback to improve its customer service. Please let us know if you object to being contacted by [Water Company] for this purpose?

Object	1
Do not object	2

IF Q8=NOT OBJECT

Q10 Furthermore, we share your feedback with **[Water Company]** to make sure that we have accurately recorded your survey feedback. Please let us know if you object to us sharing a recording of this call and our written record of your feedback including your name and contact details for this purpose? If you would like more information about how the water companies process your personal data, please refer to their privacy policy.
Do you object or not object?

Object	1
Do not object	2

THANK AND CLOSE: Thank you for your time and co-operation in this survey. On behalf of our client Ofwat, **[Water Company Name]** and ourselves at BMG Research, I would like to thank you for your time and feedback, and I hope you enjoy the rest of your evening.

Online survey script

Introduction

Thank you in advance for your participation. BMG Research is conducting a survey on behalf of Ofwat, the economic regulator of the water sector in England and Wales.

Ofwat would like your help in understanding how water and sewerage companies deal with their customers and as you have recently contacted **[Water Company Name]** we would like to understand your views about the service you received.

This information will be used to help Ofwat understand how **[Water Company Name]** is performing.

The survey will take around 5 minutes to complete.

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is here www.bmgresearch.co.uk/privacy

Click here to begin the survey **ARROW/ CHECK BOX**

By clicking the button you agree to participate in the survey.

ALL. S/C

Q1 According to our records, on **[insert date]** you dealt with **[Water Company Name]** online by **[insert channel/carrying out a task using your customer account]**. Please confirm that it was you personally who interacted with your water company, as mentioned above

Yes	1	Continue
No	2	Thank and Close: Thank you for your time but the survey needs to be completed with the person who interacted with the water company.

ALL. S/C

Q2 Was this matter in regard to **[Water Company Name]** supplying you as a domestic water user?

Yes	1	Continue
No	2	Thank and Close: Thank you for your time but we are only including domestic customers in this survey

ALL. S/C

Q3 What was the subject of the matter that you wanted **[Water Company Name]** to deal with on this occasion? **Please pick the closest that applies.**

Begin typing your reason for contact for the list to filter to the most relevant topics

A query about a bill (general)	2
A query about a payment (general)	3
A request for general information (billing/water/waste)	59
About a blockage in the sewer/drains/manholes	45
About a connection to the sewer/wastewater network	50
About a connection to the water supply network	35
About a faulty meter	38
About a leak on the meter	34
About a meter installation	18
About a stopcock installation	44
About defective/dangerous water equipment, i.e. stop taps/stopcocks/manhole covers/ hydrants/raised/sunken inspection chambers	37
About faulty wastewater equipment/sewer pipes (incl. manholes/drains/inspection chambers/covers)	46
About finding the location of waste equipment (incl. sewers/drains)	49
About finding the location of water equipment (incl. pipes/meter/stopcock)	32
About flooding with clean/drinking water	33
About flooding with sewage or foul water	47
About lead piping (incl. replacements/the Lead and Common Supply Pipe Scheme)	36
About smells from sewers and sewage treatment works	48
About the colour of the tap water	22
About the hardness of the water	42
About the quality of the tap water (incl. taste/smell)	21
Amend personal details on account (i.e., bank/card/name changes)	1
Asking for a reduction/discount in bill	19
Asking for water supply to be turned on or off	31
Because of a water leak/burst on a property	25
Because of a water leak/burst on the road (incl. fields/public footpaths)	24
Because the tap water is/was making me feel ill	23
Direct debit query	7
Direct debit set up	5
Due to a recent move/planning to move	4
Extension/build-over process/application/agreement	54

Appendix A: CSS survey scripts

General information about work being done	57
In response/reply to a letter/communication received from the Water company	58
No supply/water gone off	30
Noise issues (incl. in pipes/pumping stations/ongoing works)	41
Online account problem/query	20
Payment card query	17
Payment plan/scheme set up	6
Private sewer query	51
Regarding a hole(s) on the footpath/road with no barriers	29
Regarding a poor reinstatement	27
Regarding access during works (incl. blocked streets/drives)	28
Regarding high pressure of water	40
Regarding low pressure of water	26
Regarding poor quality of work	39
The bill seemed too high	16
There was a problem with my meter reading/meter reading query	11
To advise that I'm unable to pay	9
To apply for/to get a water meter	12
To arrange an appointment/visit	56
To empty a septic tank	53
To give/request a water meter reading	10
To make a payment	8
To make a query or complaint about a customer service issue	60
To make a query or complaint about the website	55
To notify of a customer becoming deceased (incl. connected issues)	14
To query a reminder or debt collection activity	15
To request a refund/compensation/claim	13
Toilet query	52
Water saving devices/efficiencies	43
Other	95

ALL. S/C

Q4 Please confirm the method you used to interact with **[Water Company Name]** on this occasion **[insert date]**?

I telephoned them	1
I wrote them a letter	2
I emailed them	3
I contacted them through a form on their website	4
I contacted them through 'live chat' on their website	5
I contacted them by text	6
I contacted them through social media (eg Twitter/Facebook/Instagram)	7
I contacted them through an app	8
I visited the water company in person	9
I completed a transaction through my online water company account	10
Other - specify	95
Don't know	97

ALL. S/C

Q5 Is the matter you wanted to be dealt with now fully resolved?

Yes	1
No	2
Don't know	3

ALL. S/C

Q6a Taking everything into account how satisfied are you with your recent experience with **[Water Company Name]**? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied.

0 = extremely dissatisfied	1	2	3	4	5	6	7	8	9	10 = extremely satisfied	Dk/ Refused
----------------------------	---	---	---	---	---	---	---	---	---	--------------------------	-------------

ALL. O/R

Q6b Why do you say this? **PROBE FULLY**

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q7a If you could choose your water provider, based on your recent experience, how likely would you be to recommend **[Water Company Name]** to friends or family? Please use a scale of 0-10, where 0 = not at all likely and 10 = extremely likely.

0 = not at all likely	1	2	3	4	5	6	7	8	9	10 = extremely likely	Dk/Refused
-----------------------	---	---	---	---	---	---	---	---	---	-----------------------	------------

ALL. O/R

Q7b Why do you say this? **PROBE FULLY**

--

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q8 Whilst this survey is being carried out on behalf of Ofwat, **[Water Company Name]** is keen to learn from your answers and improve its customer service. Please let us know if you object to us sharing your feedback including your name and contact details for this purpose?

Object	1
Do not object	2

IF Q8=OBJECT SHOW FOR REASSURANCE

In that case your responses will only be passed on to **[Water Company Name]** in aggregated data and will not be linked to you personally.

IF Q8=NOT OBJECT

Q9 In some cases, **[Water Company]** may contact you to discuss any issues included in your feedback to improve its customer service. Please let us know if you object to being contacted by **[Water Company]** for this purpose?

Object	1
Do not object	2

THANK AND CLOSE:

Thank you for your time and co-operation in this survey. On behalf of our client Ofwat, **[Water Company Name]** and ourselves at BMG Research, I would like to thank you for your time and feedback, and I hope you enjoy the rest of your evening.

6 Appendix B: CES survey scripts

Telephone survey script

INTRO

Good morning/afternoon/evening, I am and I am calling on behalf of Ofwat, the economic regulator of the water sector in England and Wales from from BMG Research.

We are carrying out a survey about your water company. We would like to ask you a few questions about your experience with your water company.

This information will be used to help Ofwat understand how your water company is performing.

The survey will take around 5 minutes to complete.

Your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website.

INTERVIEWER TO DETERMINE IF RESPONDENT WANTS WEBSITE ADDRESS BEFORE PROVIDING IT OR IF IT IS TO BE SENT VIA EMAIL (www.bmgresearch.co.uk/privacy)

Please note that this call may be monitored or recorded for training purposes. If necessary:

- You have been selected at random
- Ofwat's privacy notice can be accessed using this link: www.ofwat.gov.uk/privacy-statement

ASK Can I confirm that you are happy to participate in the survey?

Record on script: YES/NO

ALL. S/C

Q1a Please can I just check which company supplies water to your home? **DO NOT READ OUT.**

Anglian Water	1
Affinity Water	2
Bournemouth Water	3
Bristol Water	4
Cambridge Water	5
Essex & Suffolk Water	6
Hafren Dyfrdwy	7
Hartlepool Water	8
Northumbrian Water	9
Portsmouth Water	10
Severn Trent Water	11
South East Water	12
Southern Water	13
South Staffs Water	14
South West Water	15
SES (SES) Water	16
Thames Water	17
United Utilities	18
Welsh Water/Dwr Cymru	19
Wessex Water	20
Yorkshire Water	21
Don't know	97

IF Q1a=DON'T KNOW. S/C

Q1b Please could I have your postcode and I will check who your supplier should be?
INTERVIEWER: Check Water Company Using Water UK Postcode Checker. Based on your postcode area, I believe your water supply company should be **[Water Company Name]**. Is that correct?

Yes	1	Continue
No/Don't know	2	Thank & Close: I'm sorry but we need you to know who your water company is

ALL. S/C

Q2 We need to speak to a representative sample of customers of each water company, so before we start can I please check your age? **READ OUT BANDINGS**

	18-29	1
	30-44	2
	45-64	3
	65+	4

Q3 INTERVIEWER RECORD GENDER

	Male	1
	Female	2

READ OUT: Throughout this survey please only think about your domestic water services.

ALL. S/C

Q4 I would now like you to think about your experience of **[Water Company Name]**. Taking everything into account how satisfied are you with **[Water Company Name]**? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied.

0 = extremely dissatisfied	1	2	3	4	5	6	7	8	9	10 = extremely satisfied	Dk/ Refused
----------------------------	---	---	---	---	---	---	---	---	---	--------------------------	-------------

ALL. O/R

Q5 Why do you say this? **PROBE FULLY**

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q6a And if you could choose your water provider, how likely would you be to recommend **[Water Company Name]** to friends or family? Please use a scale of 0-10, where 0 = not at all likely and 10 = extremely likely.

0 = not at all likely	1	2	3	4	5	6	7	8	9	10 = extremely likely	Dk/ Refused
-----------------------	---	---	---	---	---	---	---	---	---	-----------------------	-------------

ALL. O/R

Q6b Why do you say this? **PROBE FULLY**

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q7 Who in your household is responsible for paying the water bill?

Yourself only	1
Yourself and other	2
Someone else	3

ALL. M/C

Q8 Thinking about **[Water Company Name]**, in the last 3 months have you... **READ OUT**

...used their website?	1
...used any online account with them?	2
...received a bill through the post from them?	3
...commented about them on social media?	4
...received an email from them?	5
...received a text message from them?	6
...interacted with them in another way?	7

ALL. S/C

Q9 And have you been in touch with **[Water Company Name]** at any time in the last 3 months?

Yes	1
No/Don't know	2

ALL. S/C

Q10 Which of the following best describes the main income earner in your household?

READ OUT

Higher managerial/administrative/professional	1
Intermediate managerial/administrative/professional	2
Supervisory or clerical, junior management/administrative/professional	3
Skilled manual worker	4
Semi-skilled/unskilled manual worker	5
Unemployed	6
State dependent	7
Retired - receive work related pension	8
Retired - receive state pension ONLY	9
Student	10
Don't know	97
Prefer not to say	99

IF Q10= Retired - receive work related pension. S/C

Q11 Which of the following best describes what the main income earner did when working?

READ OUT

Higher managerial/administrative/professional	1
Intermediate managerial/administrative/professional	2
Supervisory or clerical, junior management/administrative/professional	3
Skilled manual worker	4
Semi-skilled/unskilled manual worker	5
Don't know	97
Prefer not to say	99

THANK AND CLOSE:

Thank you for your time and co-operation in this survey. On behalf of our client Ofwat, **[Water Company Name]** and ourselves at BMG Research, I would like to thank you for your time and feedback, and I hope you enjoy the rest of your evening.

C-MeX and D-MeX shadow year research report for PR19

Face-to-face survey script

INTRO

Good morning/afternoon/evening, my name is from BMG Research, an independent research agency.

We are conducting a survey on behalf of Ofwat, the economic regulator of the water sector in England and Wales. Ofwat would like to understand customer experience with their water company and I'd like to ask you a few questions about your water company.

This information will be used to help Ofwat understand how your water company is performing.

The survey will take around 5 minutes to complete.

Your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website. You can find the details here

INTERVIEWER TO HIGHLIGHT RELEVANT INFORMATION ON CALLING CARD.

If necessary:

- You have been selected at random
- Ofwat's privacy notice can be accessed using this link: www.ofwat.gov.uk/privacy-statement

I need to record that you are happy to participate, and this one question only is recorded. This is for quality control purposes and won't be shared with anyone outside of BMG Research.

Can I confirm that you are happy to participate in the survey?

PLEASE ASK THE RESPONDENT TO READ OUT AS FOLLOWS

"I agree to take part in the survey".

ALL. S/C

Q1a Please can I just check which company supplies water to your home? **DO NOT READ OUT.**

Anglian Water	1
Affinity Water	2
Bournemouth Water	3
Bristol Water	4
Cambridge Water	5
Essex & Suffolk Water	6
Hafren Dyfrdwy	7
Hartlepool Water	8
Northumbrian Water	9
Portsmouth Water	10
Severn Trent Water	11
South East Water	12
Southern Water	13
South Staffs Water	14
South West Water	15
SES (SES) Water	16
Thames Water	17
United Utilities	18
Welsh Water/Dwr Cymru	19
Wessex Water	20
Yorkshire Water	21
Don't know	97

IF Q1a=DON'T KNOW. S/C

Q1b Please could I have your postcode and I will check who your supplier should be?
INTERVIEWER: Check Water Company Using Water UK Postcode Checker. Based on your postcode area, I believe your water supply company should be **[Water Company Name]**. Is that correct?

Yes	1	Continue
No/Don't know	2	Thank & Close: I'm sorry but we need you to know who your water company is

ALL. S/C

Q2 We need to speak to a representative sample of customers of each water company, so before we start can I please check your age? **READ OUT BANDINGS/ SHOWCARD 1**

18-29	1
30-44	2
45-64	3
65+	4

Q3 INTERVIEWER RECORD GENDER

Male	1
Female	2

READ OUT: Throughout this survey please only think about your domestic water services.

ALL. S/C

Q4 I would now like you to think about your experience of **[Water Company Name]**. Taking everything into account how satisfied are you with **[Water Company Name]**? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied.

0 = extremely dissatisfied	1	2	3	4	5	6	7	8	9	10 = extremely satisfied	Dk/ Refused
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ALL. O/R

Q5 Why do you say this? **PROBE VERY FULLY**

--

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q6a And if you could choose your water provider, how likely would you be to recommend [Water Company Name] to friends or family? Please use a scale of 0-10, where 0 = not at all likely and 10 = extremely likely.

0 = not at all likely	1	2	3	4	5	6	7	8	9	10 = extremely likely	Dk/Refused
-----------------------	---	---	---	---	---	---	---	---	---	-----------------------	------------

ALL. O/R

Q6b Why do you say this? **PROBE VERY FULLY**

--

96 NOTHING 97 DON'T KNOW

ALL. S/C

Q7 Who in your household is responsible for paying the water bill?

Yourself only	1
Yourself and other	2
Someone else	3

ALL. M/C

Q8 Thinking about **[Water Company Name]**, in the last 3 months have you... **SHOWCARD 2**

...used their website?	1
...used any online account with them?	2
...received a bill through the post from them?	3
...commented about them on social media?	4
...received an email from them?	5
...received a text message from them?	6
...interacted with them in another way?	7

ALL. S/C

Q9 And have you been in touch with **[Water Company Name]** at any time in the last 3 months?

Yes	1
No/Don't know	2

ALL. S/C

Q10 Which of the following best describes the main income earner in your household?
SHOWCARD 3

Higher managerial/administrative/professional	1
Intermediate managerial/administrative/professional	2
Supervisory or clerical, junior management/administrative/professional	3
Skilled manual worker	4
Semi-skilled/unskilled manual worker	5
Unemployed	6
State dependent	7
Retired - receive work related pension	8
Retired - receive state pension ONLY	9
Student	10
Don't know	97
Prefer not to say	99

IF Q10= Retired - receive work related pension. S/C

Q11 Which of the following best describes what the main income earner did when working?

SHOWCARD 4

Higher managerial/administrative/professional	1
Intermediate managerial/administrative/professional	2
Supervisory or clerical, junior management/administrative/professional	3
Skilled manual worker	4
Semi-skilled/unskilled manual worker	5
Don't know	97
Prefer not to say	99

THANK AND CLOSE:

Thank you for your time and co-operation in this survey. On behalf of our client Ofwat, **[Water Company Name]** and ourselves at BMG Research, I would like to thank you for your time and feedback, and I hope you enjoy the rest of your evening.

7 Appendix C: D-MeX survey script

Telephone survey script

Good morning/afternoon/evening, I am and I am calling on behalf of Ofwat, the economic regulator of the water sector in England and Wales from BMG Research. We are carrying out a survey on behalf Ofwat to understand how customers rate the service received from the Developer Service team at **[Water Company Name]**.

This information will be used to help Ofwat understand how **[Water Company Name]** is performing.

I understand that you have recently dealt with **[Water Company Name]**, in relation to a [TRANSACTION TYPE FROM DATABASE] – this was in [MONTH], for [SITE]. Please could I ask you some questions about this?

IF ASKED The survey will take around 10 minutes to complete.

Just to confirm, your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times. Your responses will only be passed on to **[Water Company Name]** in aggregated data and will not be linked to you personally.

You can find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website

INTERVIEWER TO DETERMINE IF RESPONDENT WANTS WEBSITE ADDRESS BEFORE PROVIDING IT OR IF IT IS TO BE SENT VIA EMAIL.

TO BE INCORPORATED INTO THE SCRIPT IF EMAIL REQUIRED.

(www.bmgresearch.co.uk/privacy)

Please note that this call may be monitored or recorded for training purposes.

IF NECESSARY:

- Your number has been selected at random from customers dealing with developer services at **[Water Company Name]**, in << month>>
- Your contact details have been provided to us by **[Water Company Name]**

ASK Can I confirm that you are happy to participate in the survey?

Yes	1
No	2

ALL. O/R

1. What do you feel that **[Water Company Name]** did well, if anything, in relation to this particular transaction? **PROBE FULLY**

ALL. O/R

2. And what do you feel that they could have done better, if anything - again in relation to this particular transaction? **PROBE FULLY**

ALL. S/R PER ROW

3. I'm now going to read out a number of aspects of service, and I'd like you to tell me how satisfied you are, on each of these, still thinking about your dealings with Developer Services at **[Water Company Name]**, in relation to this specific transaction where 0 is extremely dissatisfied and 10 is extremely satisfied.

- **SCRIPT: SHOW MONTH, TRANSACTION TYPE AND SITE ON SCREEN**
- **SCRIPT: READ OUT RANDOMISE ORDER**

	Extremely dissatisfied					Neither satisfied nor dissatisfied					Extremely satisfied	Don't know	N/A
a) Ease of contacting them	0	1	2	3	4	5	6	7	8	9	10	11	12
b) The quality of the information available on their website	0	1	2	3	4	5	6	7	8	9	10	11	12

C-MeX and D-MeX shadow year research report for PR19

c) Understanding your needs	0	1	2	3	4	5	6	7	8	9	10	11	12
d) Timeliness of response to queries and requests	0	1	2	3	4	5	6	7	8	9	10	11	12
e) Keeping you informed on progress, where required	0	1	2	3	4	5	6	7	8	9	10	11	12
f) Offering value for money	0	1	2	3	4	5	6	7	8	9	10	11	12
g) Completing the work within a timescale that is reasonable	0	1	2	3	4	5	6	7	8	9	10	11	12
h) Meeting agreed deadlines	0	1	2	3	4	5	6	7	8	9	10	11	12
i) Their efficiency in handling this stage of the work	0	1	2	3	4	5	6	7	8	9	10	11	12
j) Accuracy and completeness of any documentation provided (eg quotations, plans, reports etc)	0	1	2	3	4	5	6	7	8	9	10	11	12
k) Any advice and guidance they gave you, to help progress the work	0	1	2	3	4	5	6	7	8	9	10	11	12

ALL. S/C

4. How satisfied are you overall with how **[Water Company Name]** handled this particular transaction using the same scale where 0 is extremely dissatisfied and 10 is extremely satisfied.

Extremely dissatisfied					Neither satisfied nor dissatisfied					Extremely satisfied	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

ALL. O/R

5. Thinking more generally about dealing with Developer Services – what would you personally say are the top 3 most important things you are looking for, in terms of how they deliver their service?

Don't know

Nothing

ALL. O/R

6. If there was one thing that you'd suggest that the Developer Services team at **[Water Company Name]** could do, that would have most impact on how easy you find them to deal with, what would it be?

--

ALL. O/R

7. Respondent name and job title

ALL. O/R

- 8 That is the end of the interview. Are there any other comments you would like to make, before we close?

Nothing

THANK AND CLOSE:

Thank you for your time and co-operation in this survey. On behalf of our client Ofwat, **[Water Company Name]** and ourselves at BMG Research, I would like to thank you for your time and feedback, and I hope you enjoy the rest of your day.

8 Appendix D: SIM proxy calibrations (qualitative)

The Figure below details the calculations of the SIM proxy calibrations and the exact match achieved.

Figure 33: SIM proxy calculation results

						calibrated
%	Score					scores
3.4%	0					1.00
0.9%	1					1.00
1.5%	2					1.00
1.3%	3					1.54
1.9%	4		%	Score		2.00
8.2%	5					2.83
3.4%	6		6.5%	1		3.76
5.9%	7		4.0%	2		4.00
15.4%	8		7.6%	3		4.30
12.9%	9		19.2%	4		5.00
45.2%	10		62.7%	5		5.00
Mean	8.09			4.27620		4.27620

9 Appendix: Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2015) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management (ISO 27001:2013).

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.