



C-MeX and D-MeX

Final Report

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Prepared Accent (6th floor), 105 Victoria Street, London, SW1E 6QT

Contact: Julian Hollo-Tas

E-mail: Julian.hollo-tas@accent-mr.com

Telephone: 020 8742 2211

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Registered in London No. 2231083
Accent Marketing & Research Limited
Registered Address: 30 City Road, London,
EC1Y 2AB

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Executive Summary

As part of the 2019 Price review (PR19), Ofwat replaced the service incentive mechanism (SIM) with two new mechanisms – the customer measure of experience for residential customers (C-MeX) and the developer services measure of experience for developer customers (D-MeX). Both measures incentivise water companies to provide an excellent customer experience for residential and developer services customers in England and Wales.

The scope of this report is to comment on the operational delivery of C-MeX and the qualitative component of D-MeX, to provide an overall summary of results, scores, & rankings, as well as to offer insight and analysis based on the data.

Customer Measure of Experience (C-MeX)

The C-MeX score is produced entirely from the results of two surveys conducted by Accent:

- the Customer Service Survey (CSS) – a survey of a sample of domestic customers who have contacted their water company, asking them how satisfied they are with how the company has handled their issue; and
- the Customer Experience Survey (CES) – a survey of a randomly selected sample of a company's overall customer base, asking them how satisfied they are with their company.

Customer Service Survey (CSS)

An annual measure, comprised of 12 monthly surveys where one week each month is selected at random to be the 'designated period'. All companies must provide a file containing domestic contacts received from all contact channels during that week.

Participants who contacted their water company via a non-digital 'channel' (phone, letter, SMS etc) were interviewed using a Computer Assisted Telephone Interview (CATI) technique. Participants who contacted their water company via a digital 'channel' (email, online chat etc) were interviewed using an online interview technique. The split between CATI and online interviews reflected the volumes of contacts received by digital vs. non-digital channels for that water company over the period. Quotas were also set for billing/account/general queries (50%) vs. Operations (50%, (further split into water (25%) vs. waste (25%) for WASCs)).

200 interviews per quarter were achieved for each water company, over the 12 month reporting period. Where actual interview volumes varied from the set quotas, data was weighted accordingly before the production of results.

Customer Experience Survey (CES)

Also an annual measure, conducted quarterly. Interviews were conducted through a mix of CATI (75%) and face-to-face (25%) interviewing. Quotas were set based on age and gender.

200 interviews per quarter were achieved for each water company, over the 12 month reporting period. Where actual interview volumes varied from the set quotas, data was weighted accordingly before the production of results.

Combined C-MeX Score

The mean satisfaction scores (CSAT) for the two elements were combined according to the following formula:

$$\text{C-MeX} = 50\% \text{ CSS CSAT} + 50\% \text{ CES CSAT}$$

The table below shows the ranked CSAT scores for CCS (split by billing, water and waste scores), and CES, and the final C-MeX scores (the ultimate measure of the exercise, by which the incentive mechanism is applied) in the final two columns.

Table E1: Annual CCS, CES and C-MeX scores

	CCS								CES		C-MeX	
	Total	Rank	Billing	Rank	Water	Rank	Waste	Rank	CSAT	Rank	Score	Rank
Portsmouth Water	85.42	2	88.68	1	82.16	2	n/a	n/a	87.01	3	86.21	1
Wessex Water	86.77	1	86.79	2	87.39	1	86.10	3	85.41	5	86.09	2
Northumbrian Water	84.39	3	84.51	6	80.34	7	88.19	1	87.13	2	85.76	3
Welsh Water	83.11	4	82.83	9	80.41	6	86.38	2	87.19	1	85.15	4
United Utilities	82.13	7	85.61	3	75.85	12	81.45	4	85.05	7	83.59	5
Bristol Water	82.68	5	85.60	4	79.75	8	n/a	n/a	83.93	10	83.30	6
Anglian Water	82.51	6	84.53	5	80.54	5	80.43	6	83.59	11	83.05	7
Yorkshire Water	80.24	9	83.70	8	80.59	4	72.99	9	85.33	6	82.78	8
Severn Trent Water	78.34	12	83.90	7	71.94	15	73.64	8	86.35	4	82.35	9
South Staffs Water	79.59	10	81.56	12	77.63	9	n/a	n/a	84.19	9	81.89	10
Industry average	79.39	-	81.40	-	77.04	-	78.07	-	83.85	-	81.62	-
Hafren Dyfrdwy	77.99	13	80.87	13	76.57	11	73.64	7	84.78	8	81.38	11
South West Water	80.92	8	80.20	14	82.15	3	81.15	5	80.99	15	80.96	12
South East Water	79.22	11	81.86	11	76.57	10	n/a	n/a	82.18	13	80.70	13
Sutton & East Surrey (SES) Water	75.50	15	79.05	15	71.94	14	n/a	n/a	82.43	12	78.97	14
Affinity Water	77.92	14	82.35	10	73.48	13	n/a	n/a	77.85	17	77.88	15
Southern Water	67.50	16	68.55	16	68.73	16	64.17	11	81.79	14	74.64	16
Thames Water	65.65	17	63.19	17	64.69	17	71.52	10	80.18	16	72.91	17

Full uncoded and coded data has been provided to all water companies, of their detailed survey responses.

What drives satisfaction?

For CSS the most striking reason for customer satisfaction scores being good, was whether the participant felt the query had been fully resolved; satisfaction was an

average of 87.37 amongst those who said their query had been fully resolved, compared to 52.86 who felt it wasn't.

Non-digital contacts were significantly more likely to be satisfied with their recent experience compared to the digital contacts: 80.95 compared to 75.15. However, it is also observed that (a) billing queries were more likely to be digital, and (b) billing queries were more likely to have been resolved – so the link between contact channel and satisfaction may not be causative.

For CES, women were significantly more satisfied with their water company than men. Older participants (aged 65+) were more satisfied than the youngest group (18-30), but both of these groups were significantly more satisfied than the two middle groups (covering the range 30-64). There was no significant difference in satisfaction when comparing survey method (CATI vs. Face-to-face).

Further research, using additional deeper questioning and additional analysis would be required to furnish a deeper understanding of satisfaction.

What are companies doing well?

Participants who scored highly for satisfaction (scored 9 or 10, making up 57% of the sample), were asked: *“What did they do well?”*

The open responses were coded to a thematic code frame. The main two responses for the CSS survey (36% each) were ‘good customer service/relations – staff are polite/friendly/helpful/knowledgeable’ and ‘responsive/quick’.

For CES the main response by far (60% of responses) was that there were no problems and they were happy with the service. Also important were that ‘supply is reliable/constant – alternative water provided in emergencies etc’ (22%) and ‘customer service/relations is good – communication/kept updated/helpful’ (16%).

What can companies improve upon?

Participants who gave a score of 0 or 6 (24% of the sample), were asked: *“What could they have done better?”*

Again, the open responses were coded to a thematic code frame. The most frequently given responses on the CSS survey (mentioned by a third each), were ‘be more responsive – resolve issues quickly, accurately etc’ and ‘better communications – provision of information etc’.

The main area for improvement on CES (mentioned by a quarter of participants) was to do with the cost: ‘Lower bills/reduce price – discounts etc’. ‘Better customer service/relations – communication’, and ‘better water quality’ also featured (16% and 14% respectively).

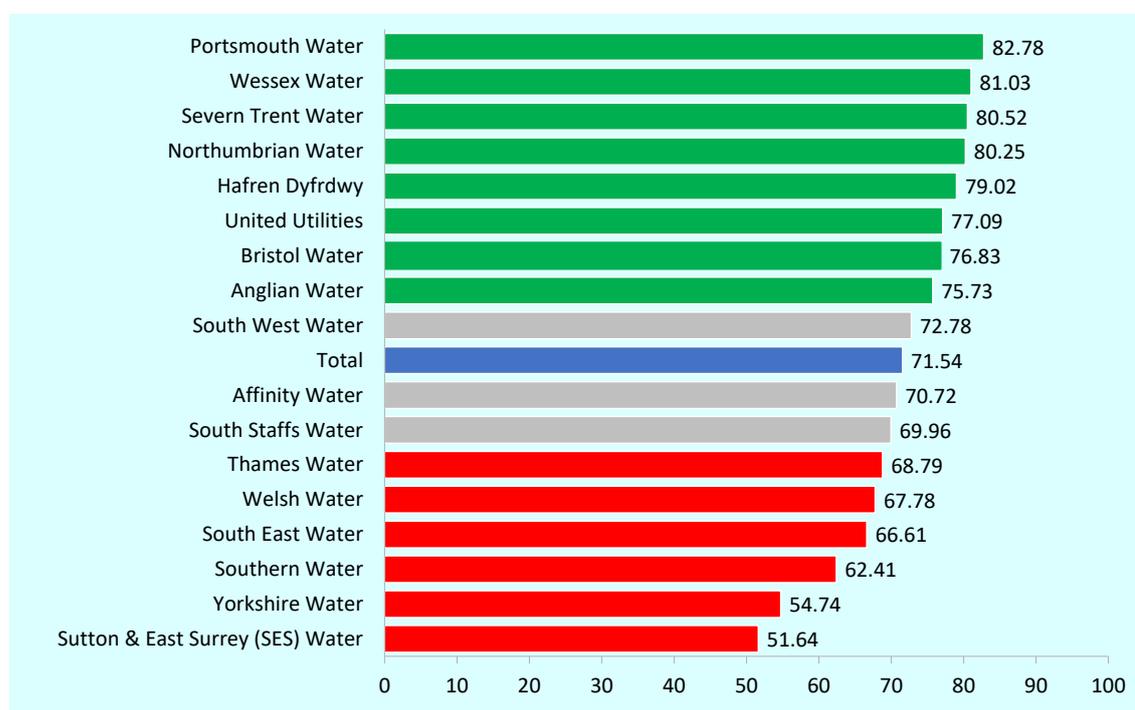
Developer Measure of Experience (D-MeX)

D-MeX is an annual measure based on two components; a qualitative element and a quantitative element. Only the qualitative element (in the form of a CATI survey) is conducted by Accent and features in this report. The quantitative element (performance against certain Water UK metrics) and the generation of the final D-MeX score is outside the scope of the work Accent has been engaged to conduct.

The sample size for each company was set at 20% of those customers that transact with a company, capped at 1,000 per year (c83 per month). Where it was evident that 20% of the sample would result in < 100 interviews for the year, the sample was maximised in order to achieve >100 interviews for the year, if at all possible. There were no other quotas.

D-MeX Qualitative Score

The following figure shows overall mean satisfaction (the measure by which the qualitative component of the D-MeX score is judged), by water company:



What were developers satisfied with?

Participants were asked to consider the Developer Services team they used in relation to their transaction and to rate them on various aspects of service.

Participants were most satisfied with the accuracy and completeness of documentation provided (with an average score of 77.48), followed by understanding their needs (74.15) and meeting agreed deadlines (74.01).

The lowest satisfaction rating was for offering value for money (62.31).

Further analysis (such as CHAID) could be conducted to furnish a deeper understanding of drivers to satisfaction.

All participants were also asked to think more generally about dealing with the water company's Developer Services team and to say what they would personally view as being the three most important things they look for in terms of how the service is delivered.

15% mentioned 'communication – including internal' as the most important aspect. 'Ease of contact' was most important for 13%, and 'responsiveness' was most important for 11%.

'Cost – value for money' was only mentioned by 6% as being the most important aspect but a further 18% did said it was 2nd or 3rd most important.

What are companies doing well?

All participants were asked to say what they thought companies did well in relation to handling their transaction. The open responses were coded to a thematic code.

The main responses were that there was 'good communication/provision of information was clear' (21%) and 'it was responsive/quick' (20%).

What can companies improve upon?

Participants were then given the opportunity to say what could have done better in relation to their transaction. The open responses were coded to a thematic code frame. 41% said there were no areas for improvement.

The main area for improvement concerned better communication/provision of information which was mentioned by 17%. A tenth each mentioned 'should be more responsive – frequency/speed etc' and 'improve speed of service – quicker turnaround.'

1 Introduction

1.1 Background and objectives

The domestic water market in England and Wales is a regulated market with 17 water companies providing water and waste water services to over 23 million households. Ofwat is the regulator for the England and Wales water and wastewater sectors and has a role to ensure customers receive affordable and cost-effective but high-quality water services.

Part of Ofwat's role is to promote effective competition and to ensure that water companies properly carry out their functions while providing value for money to customers. To support this, and to assess if the sector is delivering 'everyday excellence', Ofwat monitors the performance of water companies in terms of the service provided to its customers.

As part of the 2019 Price review (PR19), Ofwat replaced the service incentive mechanism (SIM) with two new mechanisms – the customer measure of experience for residential customers (C-MeX) and the developer services measure of experience for developer customers (D-MeX). Both measures incentivise water companies to provide an excellent customer experience for residential and developer services customers in England and Wales.

Both of these measures have been developed based on the following success criteria:

- 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
- reflects customer behaviour and market changes.

The surveys have a direct impact on the financial incentives that water companies receive and also have reputational implications. A key requirement of the surveys, therefore, is that they are accurate and can be considered robust and representative measures of customer experiences of water company services. The surveys must also be conducted following a consistent and clearly documented and well evidenced process.

The C-MeX and D-MeX have been piloted, following which revisions to the approach were made. In 2019/20 they were run in shadow form, to help finalise the design, prior to full implementation on 1 April 2020. In addition, consultation with water companies and other stakeholders resulted in further amendments to the approach, before the guidance was finalised in March 2020.

2 Methodology

2.1 Introduction

This report covers the first year of the C-MeX and D-MeX annual surveys Ofwat commissioned Accent to conduct, which covered the period 1 April 2020 to 31 March 2021. The surveys covered the 17 largest appointed water companies in England and Wales.

The C-MeX score is produced entirely from the results of two surveys conducted by Accent:

- the Customer Service Survey (CSS)
- the Customer Experience Survey (CES).

Accent produces the final C-MeX scores and circulates to all concerned.

The full C-MeX survey design and methodology is documented and published by Ofwat, and is available at <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>.

The D-MeX score is based on two components; a qualitative element and a quantitative element. Only the qualitative element (in the form of a CATI survey) is conducted by Accent and features in this report. The quantitative element (performance against certain Water UK metrics) and the generation of the final D-MeX score is outside the scope of the work Accent has been engaged to conduct and do not feature in this report.

The full D-MeX survey design and methodology is documented and published by Ofwat, and is available at <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/D-MeX-guidance-for-2020-25.pdf>.

2.2 Approach for C-MeX

C-MeX comprises a single score calculated from the results of two surveys:

- the Customer Service Survey (CSS) – a survey of a sample of domestic customers who have contacted their water company, asking them how satisfied they are with how the company has handled their issue; and
- the Customer Experience Survey (CES) – a survey of a randomly selected sample of a company's overall customer base, asking them how satisfied they are with their company.

The CES and CSS survey requirements are summarised in Table 1.

Table 1: Summary of C-MeX requirements

Survey	Sample	Survey mode	Survey frequency	Sample size per company	Weighting
CSS	Sample of customers who have contacted their water company	Telephone (CATI)	Monthly	800 / Year 200 / Qtr	<ul style="list-style-type: none"> ■ Contact: 50% billing / 50% operations (25% water / 25% wastewater) ■ Contact channel (online vs offline) by sample profile ■ Upward correction factor to contact via digital channels Comprises 50% of C-MeX score
		Online			
CES	Randomly selected sample of a company's potential customer base (quotas on age/gender, by census)	CATI	Quarterly	Min 600 / Year 150 / Qtr	Comprises 50% of C-MeX score
		Face-to-face (CAPI)		Max 200 / Year 50 / Qtr	

In addition to the C-MeX score, a net promoter score (NPS) is recorded separately without contributing to the calculation of financial incentives.

2.3 Customer Service Survey (CSS)

Sample sizes and sampling

The CSS is an annual measure, divided into 12 monthly surveys where one week each month is selected at random to be the 'designated period'. All companies must provide a file containing domestic contacts received from all contact channels during that week.

Sample weeks for the year were as shown in Table 2.

Table 2: Sample weeks

Sample week	Designated period (7 day)	Sample delivery date
1	20-26 April 2020	28/04/2020
2	18-24 May 2020	26/05/2020
3	1-7 June 2020	09/06/2020
4	13-19 July 2020	21/07/2020
5	10-16 August 2020	18/08/2020
6	31 August-6 September 2020	08/09/2020
7	19-25 October 2020	27/10/2020
8	9-15 November 2020	17/11/2020
9	30 November-6 December 2020	08/12/2020
10	18-24 January 2021	26/01/2021
11	8-14 February 2021	16/02/2021
12	1-7 March 2021	09/03/2021

Notification of a designated period being called took place by email (by 10:00 on the Monday morning immediately following the sample week). All water companies were notified simultaneously, to email accounts nominated by the water company.

As permitted by the Ofwat guidance¹, where a company's operational contacts yielded a small weekly sample, companies were permitted to submit sample covering a 14 day range (ending on the same day as the standard seven day range ended, so the notification and delivery process was the same for all).

Sample was selected by the water company subject to the exclusions documented in section 2.2.4 of the Ofwat guidance (in summary, contacts regarding: deceased, non-domestic, non-customer, non-appointed activities, the activities of other water companies, recreational/amenity activities, water company representatives, survey responses, social media activity replies, CC Water contacts, or others to be agreed by Ofwat from time to time). Water companies were not permitted to suppress their own 'Do not contact' lists (on the basis that the C-MeX interviewing is a separate processing activity being conducted for a different Controller under a different lawful basis than any to which such 'do not contact' requests would have been made).

Accent's secure upload portal was used for delivery of sample to Accent. Each water company was provided with access to their own secure area of the portal, through staff members nominated by the relevant water company. Uploaded sample files were automatically checked to ensure (amongst other things) compliance with the agreed file format, that the records supplied were for the correct date range, that the number of records supplied matched those shown on the audit sheet also uploaded, etc. Any errors found were displayed and emailed to the uploader so they could quickly correct and resubmit with the errors fixed.

Sample was uploaded by each water company (or their nominated representatives) by 17:00 on the sample delivery date shown above. In the main, and excepting a number of incidences where water companies were unable to upload in time (which were communicated well in advance to Accent, enabling us to absorb the delays), compliance with the deadline was good.

Sample was de-duplicated (both internally within files, and randomly across files), and screened against the Ofwat 'Do not contact' database (made up of those accrued in the shadow year, and those acquired on a rolling basis over the period of this contract).

¹ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

The volumes of valid sample provided by each water company are shown in Table 3.

Table 3: Total number of valid contacts after duplicates & DNRs removed

	non-digital cati BILLING contacts	digital online BILLING contacts	non-digital cati CLEAN contacts	digital online CLEAN contacts	non-digital cati WASTE contacts	digital online WASTE contacts	Total
Affinity Water	107,695	143,389	14,408	1,843	0	0	267,335
Anglian Water	153,246	340,851	26,780	5,977	18,669	3,789	549,312
Bristol Water	68,930	12,768	6,190	1,180	0	0	89,068
Hafren Dyfrdwy	8,008	9,554	2,561	145	215	11	20,494
Northumbrian Water	129,061	134,153	16,484	1,992	5,867	377	287,934
Portsmouth Water	13,261	2,872	3,124	261	0	0	19,518
Severn Trent Water	232,656	415,335	41,885	4,149	15,725	1,000	710,750
South East Water	79,172	73,586	13,571	1,898	0	0	168,227
Southern Water	130,578	148,322	7,951	22	9,822	1,148	297,843
South Staffs Water	49,822	53,161	4,498	516	0	0	107,997
South West Water	127,620	105,031	12,490	372	2,769	148	248,430
SES Water	16,215	9,453	3,711	431	0	0	29,810
Thames Water	347,538	489,262	36,575	412	34,902	223	908,912
United Utilities	217,248	196,244	23,952	3,335	8,758	1,368	450,905
Welsh Water	107,732	82,778	14,798	2,150	5,997	914	214,369
Wessex Water	138,449	23,851	6,740	940	6,289	668	176,937
Yorkshire Water	182,146	95,159	22,603	330	13,249	187	313,674
Total	2,109,377	2,335,769	258,321	25,953	122,262	9,833	4,861,515

The current full list of acceptable contact channels (to which entries can be added only on consultation resulting in a decision on how to classify) is shown in Table 4.

Table 4: Acceptable contact channels

Channel	Classification
Letters	Non-digital
Telephone	Non-digital
WhatsApp	Non-digital
Visits	Non-digital
SMS	Non-digital
Fax	Non-digital
Email	Digital
Apple chat	Digital
Social Media	Digital
Web form	Digital
Web chat	Digital
Online account	Digital
Landlord portal	Digital
Other digital	Digital
App	Digital
Bi-lateral	Excluded
Exclusions	Excluded
Missing channel	Excluded
Third party agent contacts	Excluded

Whilst WhatsApp and even SMS are essentially “digital” means of contact, the practicalities (that we have a phone number for these participants and not an email address) mean that they are classified as being “non-digital”.

Quotas

Quotas were set on both contact type (billing vs. water vs. (if applicable) waste), and contact method (broadly speaking, digital vs non-digital).

Participants who had contacted their water company via a non-digital means (as defined by the Ofwat guidance²) were interviewed using a Computer Assisted Telephone Interviewing (CATI) approach. Those who had contacted via digital methods were approached by email to complete an online interview.

Contact type quotas were set as follows, as the first step:

- Water only companies
 - 100 billing & 100 water interviews per quarter
- Water and sewerage companies
 - 100 billing & 50 water & 50 wastewater interviews per quarter.

Then quotas for contact method (digital vs. non-digital) within those targets were generated. These quotas were sample driven and varied significantly from one water company to the next as shown in Table 5.

Table 5: Non-digital v digital sample proportions by billing, water and waste by water company

	Billing		Water		Waste	
	Non-digital (CATI)	Digital (online)	Non-digital (CATI)	Digital (online)	Non-digital (CATI)	Digital (online)
Affinity Water	43%	57%	89%	11%		
Anglian Water	31%	69%	82%	18%	83%	17%
Bristol Water	84%	16%	84%	16%		
Hafren Dyfrdwy	46%	54%	95%	5%	95%	5%
Northumbrian Water	49%	51%	89%	11%	94%	6%
Portsmouth Water	82%	18%	92%	8%		
Severn Trent Water	36%	64%	91%	9%	94%	6%
South East Water	52%	48%	88%	12%		
Southern Water	47%	53%	100%	0%	90%	10%
South Staffs Water	48%	52%	90%	10%		
South West Water	55%	45%	97%	3%	95%	5%
SES Water	63%	37%	90%	10%		
Thames Water	42%	58%	99%	1%	99%	1%
United Utilities	53%	47%	88%	12%	86%	14%
Welsh Water	57%	43%	87%	13%	87%	13%
Wessex Water	85%	15%	88%	12%	90%	10%
Yorkshire Water	66%	34%	99%	1%	99%	1%
Total	47%	53%	91%	9%	93%	7%

² <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

Variations notwithstanding, there was a fairly consistent and recognisable difference overall between the penetration of digital contacts for billing reasons, when compared to either water or waste interviewing, as shown below:

■ Billing:		
– Non-digital (CATI)		47%
– Digital (online)		53%
■ Water:		
– Non-digital (CATI)		91%
– Digital (online)		9%
■ Waste:		
– Non-digital (CATI)		93%
– Digital (online)		7%

Fieldwork administration

CATI fieldwork was administered from Accent's largely Edinburgh based telephone unit (that up until March 2020 had been entirely office based in Edinburgh but in response to the Covid-19 crisis at that time became entirely remote). All calls continued to be recorded throughout and all interviewers' work was accessible and visible live in real time to the supervision team, and Accent's ISO20252:2012 quality measures were maintained throughout the period of the fieldwork.

Sample was loaded into Accent's in house interviewing software, and all quotas were set in accordance with the methods described in the previous section.

Sample was distributed to the interviewing team on a random basis (meaning all interviewers were working on sample for all water firms at any given time). This approach ensured interviewer bias was not introduced into the survey results.

Ensuring a representative response was a top priority, so a sample selection methodology was introduced that was specifically designed to ensure a representative cross-section of the sample was interviewed in situations where the profile of the sample as a whole was not known.

The approach, in brief, was to restrict the number of records that were available to the interviewing team at any one time, and then apply a system of rules on frequency of call, times of day those calls could be made, and the minimum number of calls that must be made for each record before that record can be abandoned and another selected for contact. This ensured that the randomly selected original records were each given a fair chance to answer the phone and respond to the survey before permitting more records to be made available to the interviewing team.

A similar approach was adopted for the digital (online) interviews. Certain records were randomly selected for inclusion, emailed, and reminded by further emails, before additional participants were invited to take part in the research.

Interviews were administered using the agreed script, as shown in the Ofwat guidance³ and Appendix A. The average interview duration for CATI interviews over the year was five minutes, and for online interviews was four minutes.

Check and Challenge

As described in section 2.2.6 of the Ofwat guidance, all phone calls were recorded and, where consent was given by the participant, were passed to the water companies for the purposes of ensuring the agent had 'accurately recorded customer survey feedback'.

Challenges were submitted to Accent on the approved template, and an initial process of assessment was carried out by Accent which involved categorising the nature of the challenge and listening to the supporting recording to clarify the facts of the case. Accent then made an initial decision whether to uphold or reject the challenge. In cases where the decision was difficult or the case unclear, or the reason for the challenge was unusual/unprecedented, Ofwat were consulted. All challenges were responded to individually, and the responses were almost entirely accepted. In the event that the water company was not satisfied with the decision, the case was referred to Ofwat for a final verdict.

Over the year of fieldwork, 9,457 call recordings were sent to water companies, and in response 172 challenges were received. A summary of the nature of the challenges received, along with their outcomes is shown in Table 6.

Table 6: Summary of the nature of the challenges

Challenge type	Challenges	Agreed	Dismissed
Digital interviews challenged for whatever reason	44	1	43
Interviewer assumed score/failed to fully probe	32	27	5
Wrong person interviewed	16	13	3
Incorrect reason for call	14	0	14
Doubt over participant referring to that specific call/taking into account other contacts	13	0	13
Interviewer prompted	11	5	6
Participant was talking about a different company	9	3	6
Ineligible works	7	5	2
Incorrectly administered question	6	2	4
Interviewer mis-heard/mis-coded	5	4	1
Not domestic supply	5	3	2
Off script comments influenced scores	3	0	3
Wrong question wording used	2	0	2
Missing recording - unable to check interview accuracy	2	0	2
Participant didn't remember contact	2	2	0
Participant didn't understand scoring system	1	1	0
Total	172	66	106

- Total challenges warranting no action 107
- Total where data amendments are necessary 9
- Total resulting in exclusion of the interview 62

³ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

71 recordings (0.75% of those generated) contained cause for either data amendment or exclusion.

Broadly speaking the check and challenge process worked well; it provided an opportunity for water companies to challenge where occasions of flawed interviewing took place, and over the period of the year challenges of this type dropped and interviewing quality increased.

There were a number of issues with the process as summarised below.

- 44 challenges (over 25%) were related to online interviews. Since Accent has no role in accurately recording customer survey feedback (all survey data having been entered by the participant themselves), and no recordings exist to verify participant intentions, these were (at Ofwat's direction) rejected as a matter of course. Ofwat have reiterated this instruction to Accent, and also have reiterated to the water companies that it is not their intention for online interviews to be included in the check and challenge process, both throughout and since the fieldwork period.

The sole exception (visible in the table above) was where a participant had typed in the open-ended response boxes that they were scoring purely on the basis that the interview was not offered in Welsh. The water firm felt it was clear that the feedback was entirely unrelated to their activities, and should be excluded. Accent referred the water company to Ofwat (the path to recourse always available should a water company feel Accent's response to a challenge was not acceptable), and Ofwat ruled that in exception this challenge should be upheld.

Whilst offering Welsh telephone interviewing does come with a fairly significant cost implication, translating and offering the questionnaire in Welsh for online interviewing has a much lower (and one off) cost associated with it. Measures are therefore being put in place to start offering the online survey in Welsh (including to people contacted via phone).

- There is room for clarification within the Ofwat guidance⁴ regarding the treatment of records where the participant disagrees with the reason for contact stated on the sample and reclassifies themselves (something seen in both online and CATI interviews). Ofwat's instruction to Accent at the survey design stage and since, has been that *'customer contacts will not be reallocated based on customer reasons'*.

However, the Ofwat guidance does suggest that *'being incorrectly allocated to a particular 'reason for contact''* is legitimate grounds for a challenge. It is understood that this eventuality covers an interviewer mis-coding a participant response in error, rather than the participant disagreeing with the reason provided on the sample, but water companies did struggle with this fairly consistently over the period.

⁴ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

One factor that is identified as potentially contributing to the issue is the identification of the reason for contact within the survey script. The first option the participant is presented with is *'Anything to do with billing, your account or a general query'*. We suspect that some participants considered some waste or water queries as being a *'general query'* and moved themselves into this code. Consideration should be given to whether this code is phrased entirely as intended.

Analysis of the higher level reason for contact cross referenced with the open ended response given afterwards, showed that a significant number of participants who reclassified themselves then went on to contradict themselves when going into more detail (suggesting that to choose to reallocate would make incorrect as many participants as it corrects).

The working procedure is that a participant remains, as far as the classification of the interview and the resulting data is concerned, as the water company defined them initially. Ofwat have acknowledged that guidance revision may be required.

- A number of challenges were made where the participant either took into account other calls/contacts, or took into account issues that were not directly related to the specific contact at hand. Ofwat's decision on these was that provided it was evident that the participant feedback was still somewhat based on the water company's provision of household services to the customer, then the interview should be included. Potentially this could be written into the guidance.
- On 2nd Dec (part of Quarter 3), Accent's call recorder stopped recording as a result of a setting change made as part of an upgrade, that caused a problem that did not manifest in testing. As a result, 76 participants who said recordings could be passed on, did not have recordings for their interviews.

All firms were affected, and all were offered the option of either keeping all affected interviews and accepting that no challenges would be possible, or to reject all of them and take replacements. The decision was made by each of the affected water companies without seeing any of the affected data. Nine of the 17 companies requested that all interviews (36 of them) were replaced, the others accepted the data knowing they could not challenge it.

Data Generation, Weighting & Provision

Following the check and challenge process (including data amends as necessary), quarterly data was produced.

Online interviews had a correction factor of +5% applied to the responses, in line with the Ofwat guidance⁵, before any other processing took place.

⁵ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

Data was weighted to ensure that **Billing** contributed 50% towards the mean CSS scores (for the CSAT question Q12, and NPS question Q16), and **Operations** 50% (further split to 25% & 25% for water & waste, in the case of water and sewerage companies).

Data was further weighted to ensure that within each contact type (billing vs. waste), the contribution to the mean scores made by records from each contact channel (digital vs. non-digital) reflected precisely the split of usable sample provided in that contact type for that particular water company.

As such, the quarterly CSAT and NPS scores were produced for each water company.

Clarification on the process for Bristol and Wessex Water, and for Severn Trent and Hafren Dyfrdwy, is warranted.

Bristol Water and Wessex Water (which share billing call handling but have separate operations call handling), were essentially handled completely separately other than having a joint billing sample file. Bristol Water was treated as a water only company and set quotas of 100 billing and 100 water interviews. The billing interviews were obtained from the combined Bristol Water and Wessex Water billing file and the profile of online vs CATI interviews led by the profile of that sample file as a whole. The operations interviews were achieved from the operations file as normal. Wessex Water was treated as a water and sewerage company and set quotas of 100 billing, 50 water, and 50 waste. The billing interviews were obtained from the combined Bristol Water and Wessex Water billing file and the profile of online vs CATI interviews led by the profile of that sample file as a whole. The operations interviews were achieved from the operations file as normal.

Hafren Dyfrdwy has relatively few waste water customers, and, as expected, it was not possible to conduct sufficient interviews from it to produce a reliable score. As such the Hafren Dyfrdwy waste sample was maximised as far as possible, and a standard quota of 50 waste interviews per quarter was set for Severn Trent Water. The data for these were combined and used to produce a single waste score that was attributed to both Severn Trent Water and Hafren Dyfrdwy. Billing and water scores for both Severn Trent Water and Hafren Dyfrdwy were produced in the normal fashion, completely independently.

Over the course of the year, culminating at the end of Quarter 4, cumulative/'year to date' CSAT and NPS scores were also produced. These were produced by combining all data generated to that point, weighting again from scratch (first by contact type to the proportions above, then by contact channel against all usable sample provided to date for that contact type). This meant that each individual data record's weighing factor changed as the year progressed (and each quarter both quarterly and cumulative data files (showing the individual weighting factor for that record) were released).

The final CSS CSAT and NPS scores were a product of this cumulative annual data provision and collection exercise (rather than as an average of the quarterly interim scores or any other means).

2.4 Customer Experience Survey (CES)

Sample sizes and sampling

200 interviews per quarter were achieved for each water company, over the 12 month reporting period.

Interviews were conducted through a mix of CATI and face-to-face interviewing. CATI interviews were obtained using a mix of random digit dialling (RDD) and lifestyle samples. Face-to-face interviews were obtained using a mix of on-street and house to house interviewing.

Participants did not need to be named customers of their water company, but were included on the basis that they were aware (either prompted or unprompted) of who their water supplier was. This was assessed using a postcode lookup generated from lists of supply postcodes provided by all water companies at the start of the project.

Quotas

Age and gender quotas were to set by company using ONS overall England and Wales mid-year estimates.

Table 7: Age and gender quotas

Age	%	Quarterly per water company	Quarterly total
18-29	19	38	646
30-44	25	50	850
45-64	33	66	1,122
65+	23	46	782
Total		200	3,400
Gender			
Male	49	98	1,666
Female	51	102	1,734
Total		200	3,400

Fieldwork administration & the impact of Covid-19

A mixed methodology of CATI and face-to-face fieldwork was planned, with a minimum target of 75% CATI over the course of the year permitted. Covid-19 dominated the implementation of the methodology over the period. Accent worked closely with Ofwat to ensure that what was being done reflected Ofwat's intentions (in numerous regards, including fair administration of the interviews across the water companies, and safe treatment of interviewing staff and participants).

In Quarter 1 (April to June 2020 inclusive) Covid-19 meant that face-to-face interviewing was not possible. The late start to the contract combined with the difficulty of reaching some quotas over the phone, meant that it was not possible to achieve the full quota of 3,400 interviews. In practice 2,984 interviews, all CATI, were achieved. The shortfall was carried over into Quarter 2, with Ofwat's consent.

In late August and September 2020 (Quarter 2), Covid-19 restrictions had eased such that face-to-face interviews were possible (albeit subject to a number of restrictions, including (but not limited to) restrictions on movement between areas, on travel and transport, on modes of face-to-face interviewing, and subject to comprehensive risk assessment). In Quarter 2, 3,849 interviews were achieved (2,393 by CATI and 1,456 face-to-face), recovering entirely the shortfall from Quarter 1.

For Quarter 3 (October to December 2020) face-to-face interviewing was again possible in December 2020, again subject to restrictions. 3,497 interviews (2,229 CATI and 1,268 face-to-face) were achieved.

Similarly in Quarter 4 (January to March 2021) face-to-face interviewing was possible subject to restrictions. 3,316 interviews were conducted (2,631 CATI and 685 face-to-face) were achieved.

At the end of the year, all water companies finished with very similar penetrations of CATI vs face-to-face interviews.

Table 8: Annual CATI v face-face interviews by water company

	CATI	Face-to-face	Total
Affinity Water	600	200	800
Anglian Water	600	200	800
Bristol Water	597	205	802
Hafren Dyfrdwy	593	208	801
Northumbrian Water	600	200	800
Portsmouth Water	601	203	804
Severn Trent Water	600	200	800
South East Water	600	200	800
Southern Water	600	200	800
South Staffs Water	600	200	800
South West Water	600	201	801
SES Water	600	200	800
Thames Water	600	200	800
United Utilities	600	200	800
Welsh Water	600	201	801
Wessex Water	600	200	800
Yorkshire Water	600	200	800

Face-to-face interviews were carried out in at least two different locations for each water company each quarter and locations changed on a quarterly basis. A mix of large and small urban centres, as well as more rural areas, were included.

Interviews were administered using the agreed questionnaire script, as shown in the Ofwat Guidance⁶ and Appendix B in this report.

The average interview length was seven minutes.

⁶ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

Data Generation, Weighting & Provision

For each quarter, interview data for each area was weighted to the quotas set out above. Individual weighting factors were produced for each record, and raw data showing this was produced and provided to the relevant water company. Quarterly interim CSAT and CSS scores for the CES element of C-MeX were produced from this data and distributed to water companies.

Similar to the CSS process, in order to reduce weighting factors overall and suppress quarterly variations, over the course of the year (culminating at the end of Quarter 4, cumulative/'year to date' CSAT and NPS scores were also produced. These were produced by combining all data generated to that point, and weighting again from scratch against the quotas.

This meant that each individual data record's weighing factor changed as the project progressed (and each quarter both quarterly and cumulative data files (showing the individual weighting factor for that record) were released to the water companies).

The final CSS CSAT and NPS scores were a product of this cumulative annual data provision and collection exercise (rather than as an average of the quarterly interim scores or any other means).

2.5 Combined CSS and CES scoring and reporting

At the conclusion of each quarter, a report was produced and distributed to each water company that showed (separately, for both CSAT and NPS) their own CSS (billing, water, & waste), CES, and combined C-MeX (based on CSAT) and NPS scores – on both a quarterly and cumulative basis.

It also showed (for both CSAT/C-MeX and NPS, on both a quarterly and cumulative basis) the overall CSS, CES, combined C-MeX and NPS scores for all water companies ranked in descending order.

Water companies noticed that there was more information on their own report about their own detailed score breakdown than there was about other water companies (specifically the billing, water, and waste components). Accent understands data sharing has been occurring between the water companies so they can see for their own purposes their specific rankings on these very detailed components of the C-MeX score. This is information that is provided to Ofwat by Accent and it is Accent's understanding that having consulted with water companies this information is to be circulated to water companies by Accent in Year 2 and beyond. Chapter 5 of this report includes a recommendation that this arrangement be enshrined into the Ofwat guidance⁷ for the avoidance of doubt.

⁷ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

All companies were seen to have provided at least five (including three online) channels to customers, so no deductions were made to C-MeX scores as a result of this instruction in the Ofwat C-MeX guidance.

2.6 Approach for D-MeX

The qualitative component of D-MeX is a monthly piece of work that requires the water company to pass all developer services customer contacts who have completed a relevant transaction in the previous month, to Accent.

The qualitative D-MeX requirements are summarised in Table 9.

Table 9: Summary of D-MeX requirements

Survey	Sample	Survey mode	Survey frequency	Sample size per company
D-MeX - Qualitative	Randomly selected sample of all developer services customers transacting with a company in a month	CATI	Monthly	20% of all customers, minimum of 100 per year and capped at 1,000 per year

Sampling

The initial metrics identifying relevant transactions were published in the PR19 final recommendations⁸. From 1st October 2020 the list of relevant metrics was revised following consultation, in accordance with the relevant published document⁹.

The current working list of metrics is shown in Appendix E.

Sample was initially provided to Accent (along with finalised Water UK returns) no later than four working days after the submission deadline for Water UK returns on the 20th of the following month. Following the metric change in October, the deadline was moved to be *'the 10th of the following month'*. The ability of water companies to consistently provide all relevant information by this date has been inconsistent, particularly when the 10th fell on a Saturday or Sunday. It was established fairly early on between Ofwat, the water companies and Accent, that when the 10th fell on a weekend extra time was required. The current working arrangement is that if the 10th falls on a Saturday (and so one working day is lost), the deadline is the end of the following working day. Where the 10th falls on a Sunday, the deadline is the end of the second following working day. Chapter 5 of this report includes a recommendation to solidify this arrangement in the Ofwat guidance¹⁰.

Accent's secure upload portal was used for delivery of sample to Accent. Each water company was provided with access to their own secure area, available only to those staff

⁸ <https://www.ofwat.gov.uk/regulated-companies/price-review/2019-price-review/final-determinations/>

⁹ <https://www.ofwat.gov.uk/wp-content/uploads/2021/03/Changing-the-Water-UK-metrics-in-D-MeX-%E2%80%93-our-decisions.pdf>

¹⁰ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/D-MeX-guidance-for-2020-25.pdf>

members nominated by the relevant water company. Uploaded sample files were automatically checked to ensure (amongst other things) compliance with the agreed file format, that the records supplied were for the correct date range, that the number of records supplied matched those shown on the audit sheet also uploaded, and that only valid metrics were included etc. Any errors found were displayed and emailed to the uploader so they could quickly correct and resubmit with the errors fixed.

Generally, the sample supplied matched the volume recorded on the audit sheet. The notable exceptions were metrics W3.1, W30.1, and W4.1, where consistently reported volumes were far larger than those supplied. This is because each plot shows on the audit sheet as a count, but each line of sample may contain numerous plots (in some cases over 1,000 plots on a single usable line of sample). It is not desirable to split each plot out on the sample, and in the process generate duplicates (in terms of usable sample), so we do not recommend any change to how water companies provide this sample.

Sample was de-duplicated in accordance with the published requirements, and screened against the Ofwat 'Do not contact' database (made up of those accrued in the shadow year, and those acquired on a rolling basis over the period of this contract).

Quotas

The sample size for each company was set at 20% of those customers that transact with a company, capped at 1000 per year (c83 per month). Where it was evident that 20% of the sample would result in < 100 interviews for the year, the sample was maximised in order to achieve >100 interviews for the year, if at all possible. There were no other quotas.

Actual sample sizes achieved by water company is shown in Table 10.

Table 10: sample sizes achieved by water company

Affinity Water	710
Anglian Water	975
Bristol Water	319
Hafren Dyfrdwy	82
Northumbrian Water	827
Portsmouth Water	108
Severn Trent Water	983
South East Water	576
Southern Water	791
South Staffs Water	270
South West Water	811
SES Water	128
Thames Water	995
United Utilities	959
Welsh Water	915
Wessex Water	613
Yorkshire Water	950

It should be noted that sample volumes (and consequently interview volumes) were depressed in Quarter 1, as a result of Covid-19 preventing developer work completions.

Fieldwork administration

CATI fieldwork was administered from Accent's largely Edinburgh based telephone unit (that up until March 2020 had been entirely office based in Edinburgh but in response to the Covid-19 crisis around that time became entirely remote/home working). All calls continued to be recorded throughout, all interviewers' work accessible and visible live in real time to the supervision team, and Accent's ISO20252:2012 quality measures were maintained throughout the period of the fieldwork.

Sample was loaded into Accent's in house interviewing software, and all quotas were set in accordance with the methods described in the previous section.

Sample was distributed to the interviewing team on a random basis (meaning all interviewers were working on sample for all water firms at any given time). This approach ensured interviewer bias was not introduced into the survey results.

Interviews were administered using the agreed script, as shown in the Ofwat guidance¹¹ and Appendix C in this report. The average interview duration for CATI interviews over the year was seven minutes.

Data Generation, Weighting & Provision

Following the conclusion of each quarter, coded and uncoded raw data for each water company was generated.

In order to provide water companies with as much information as possible to trace and locate issues, metric data was made visible to water companies on this data – but only in cases where at least 20 records had been supplied in that metric (so as to prevent accidental identification of participants without their consent).

No weighting was used on the D-MeX survey data.

Water companies were provided with their (coded and uncoded) raw data, and a report showing on a quarterly and cumulative (culminating in the final year 1) CSAT score and ranking.

¹¹ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/D-MeX-guidance-for-2020-25.pdf>

3 C-MeX Findings

3.1 Introduction

This chapter sets out the findings from the Customer Service Survey (CSS) and the Customer Experience Survey (CES).

The overall C-MeX Survey Score is shown in Section 3.4 and the overall NPS score is shown in Section 3.5.

3.2 Customer Service Survey (CSS)

This section sets out the results from the Customer Service Survey (CSS).

The survey was administered by CATI¹² or online with a sample of customers who had contacted their water company.

All participants were reminded of the date and water company with whom they had contact and informed:

“Ofwat would like your help in understanding how water and sewerage companies deal with their customers and we would like to ask you a few questions about the service you received.”

The total annual sample size was 13,959 across all 17 water companies.

Reasons for contact

For the overall sample the general nature of their contact was defined as either

- billing, account or a general query
- to do with supply of water
- to do with sewerage service.

For the online sample only (27% of all participants) the detailed reason for contact under each of these three categories was probed.

Detailed billing/account related queries

For the 2,897 who were asked about billing/account related queries, the following were shown in the questionnaire:

¹² CATI = Computer Aided Telephone Interview

- Amend personal details on account
- A query about a bill
- A query about a payment
- Due to a recent move, or planning to move
- Direct debit set up
- Payment plan set up
- Direct debit query
- To make a payment
- To advise that I'm unable to pay
- To apply for/to get a water meter
- To give/request a water meter reading
- To report a problem with my meter/meter query
- To request a refund
- To notify of a customer having died
- To query a reminder or debt collection activity
- The bill seemed too high
- Payment card query
- Asking for a reduction/discount in bill
- Online account problem/setting up
- To make a query or complaint about the website
- To make a query or complaint about a customer service issue
- Other.

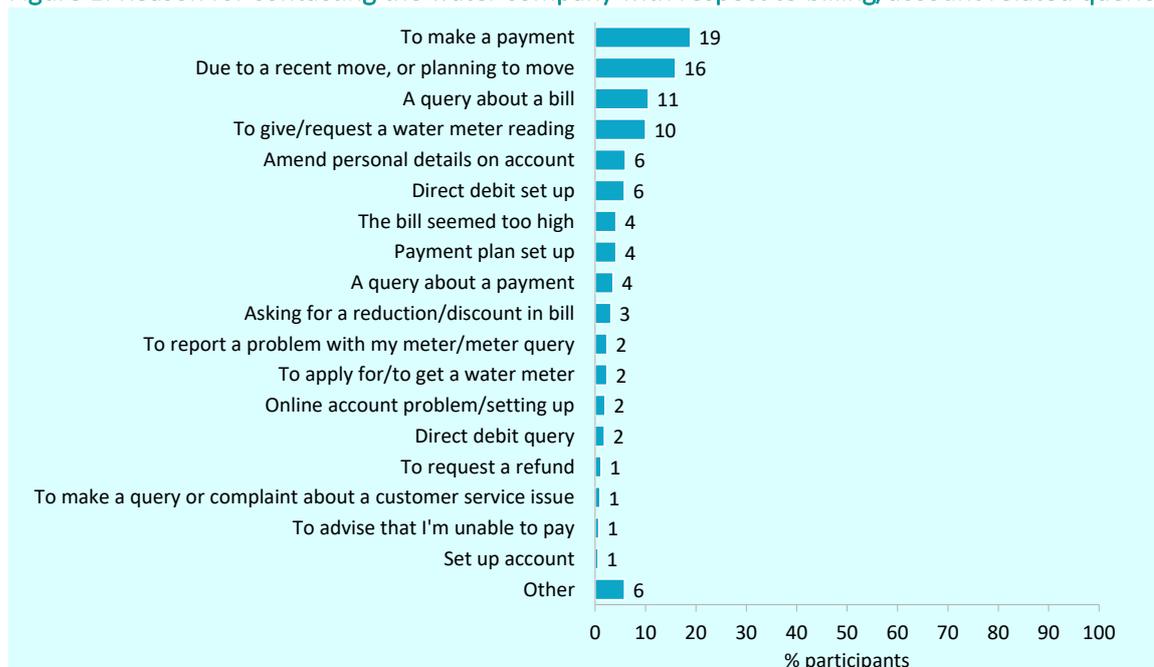
Responses in the 'other' category were coded and the following new categories were added:

- To change Direct Debit
- Removal of water meter
- Water usage query
- To register as a vulnerable person/enquire about PSR
- Set up account
- *Water related issue*
- *Waste related issue*

The final two, italicised, codes needed to be created due to the number of participants selecting one high level reason for call then contradicting themselves in the subsequent open ended response.

For the online sample the main reasons for contacting the water company with respect to billing/account related queries were to make a payment (19%), due to a recent move, or planning to move (16%), a query about a bill (11%) and to give/request a water meter reading (10%). See Figure 1.

Figure 1: Reason for contacting the water company with respect to billing/account related queries



Weighted base: 2,897 online sample

Detailed water related queries

For the 873 who were asked about water related queries, the following were shown in the questionnaire:

- About a faulty meter
- About a meter installation
- About finding the location of water equipment (incl. pipes/meter/stopcock)
- About the taste or smell of the tap water (quality)
- About the colour of the tap water
- Because the tap water is/was making me feel ill
- Because of a water leak/burst on the road
- Because of a water leak/burst on my property
- Regarding low pressure of tap water
- No supply/water gone off
- Asking for water supply to be turned on or off
- About flooding with clean/drinking water
- About a leak on my meter
- About a connection to the water supply network
- About the Lead and Common Supply Pipe Scheme
- About defective/dangerous water equipment ie stop taps, manhole covers, hydrants, raised/sunken chambers
- High pressure from my tap
- About the hardness of the water
- Other.

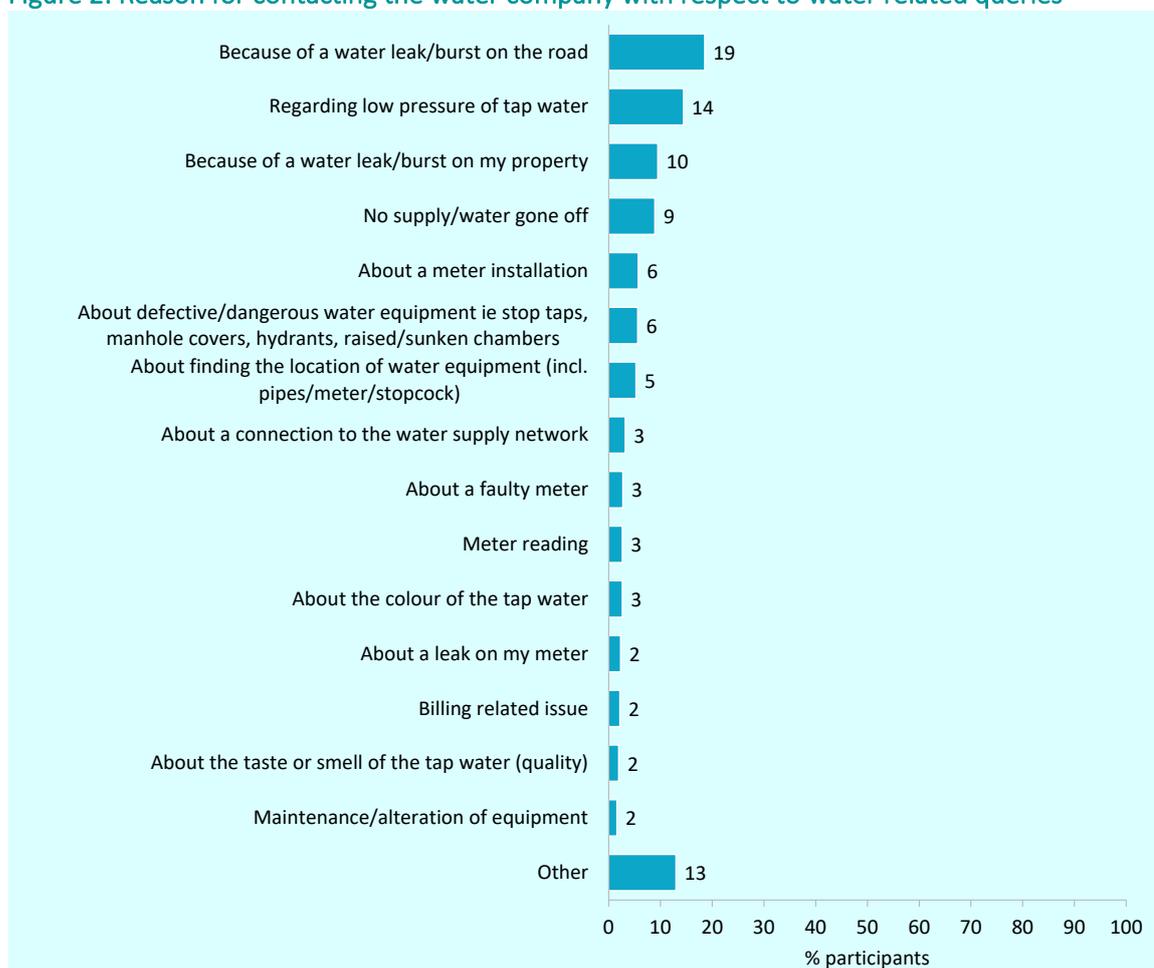
Responses in the 'other' category were coded and the following new categories were added:

- Domestic leak – at neighbour’s etc
- Maintenance/alteration of equipment
- Meter reading
- Misuse of water
- Meter related query
- Usage of water – volume etc
- Water saving advice/equipment
- About content of water – fluoride etc.
- *Billing related issue*
- *Waste related issue*

The final two, italicised, codes needed to be created due to the number of participants selecting one high level reason for call then contradicting themselves in the subsequent open ended response.

For the online sample the main reasons for contacting the water company with respect to water related queries were a water leak/burst pipe on the road (19%), low pressure of tap water (14%) and a water leak/burst pipe on their property (10%). See Figure 2.

Figure 2: Reason for contacting the water company with respect to water related queries



Weighted base: 873 online sample

Detailed wastewater (sewerage) related queries

For the 223 who were asked about wastewater (sewerage) related queries, the following were shown in the questionnaire:

- About a blockage in the sewer/drains
- About faulty wastewater equipment or sewer pipes
- About flooding with sewerage or foul water
- About smells from sewers and sewage treatment works
- About finding the location of sewers, drains etc
- About a connection to the sewer, wastewater network
- Empty septic tank
- Private sewer query
- Regarding a poor reinstatement
- Toilet query
- Other.

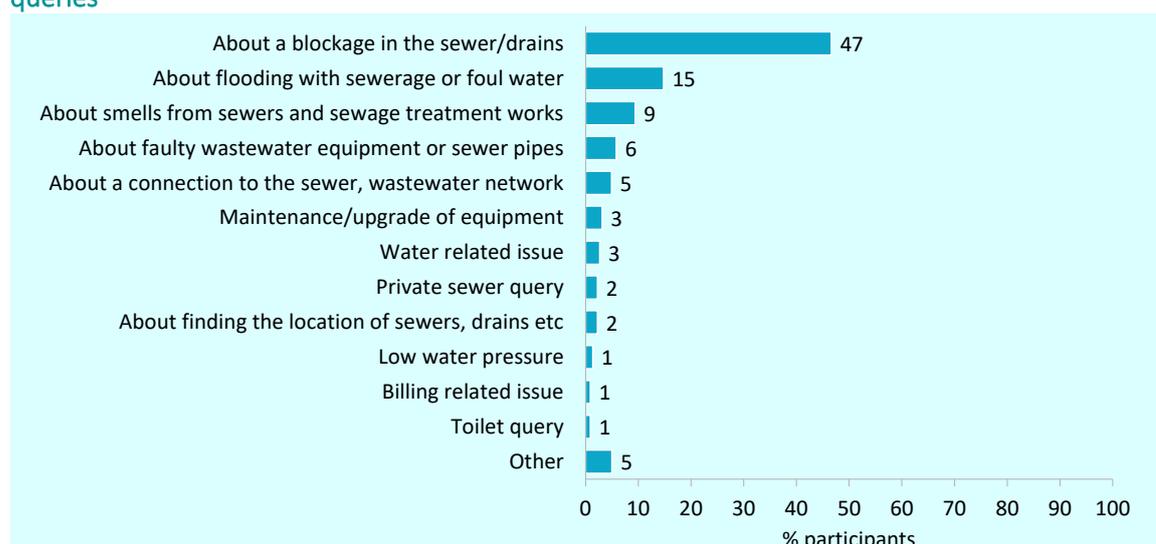
Responses in the 'other' category were coded and the following new categories were added:

- Low water pressure
- Maintenance/upgrade of equipment
- *Water related issue*
- *Billing related issue.*

The final two, italicised, codes needed to be created due to the number of participants selecting one high level reason for call then contradicting themselves in the subsequent open ended response.

For the online sample the main reasons for contacting the water company with respect to wastewater (sewerage) related queries were a blockage in the sewer/drains (47%), flooding with sewerage or foul water (15%) and smells from sewers and sewage treatment works (9%). See Figure 3.

Figure 3: Reason for contacting the water company with respect to wastewater (sewerage) related queries

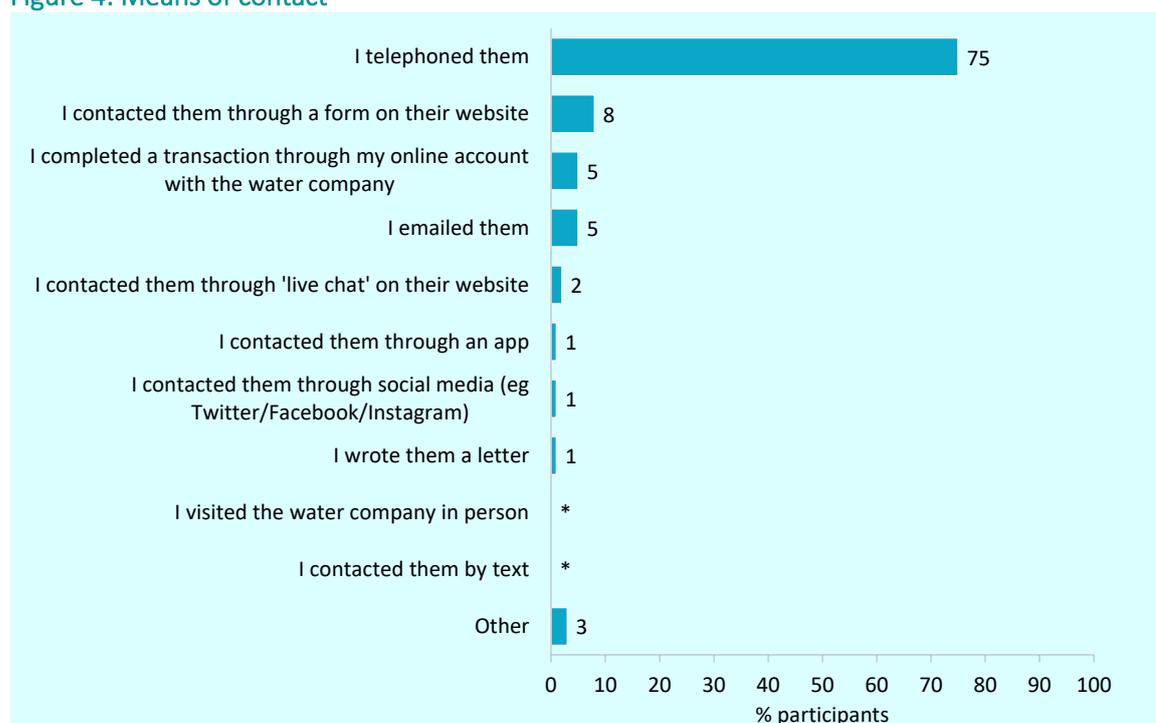


Weighted base: 223 online sample

Means of contact

The sample were asked to confirm how they had contacted the water company. Overall, 75% used the phone, which is higher than one might expect given that only 73% of the sample was non-digital. The cause is some of the digital sample mentioned telephone as their means of contact (the same was true in reverse, but to a lesser extent).

Figure 4: Means of contact



Weighted base: 13,959

Resolution

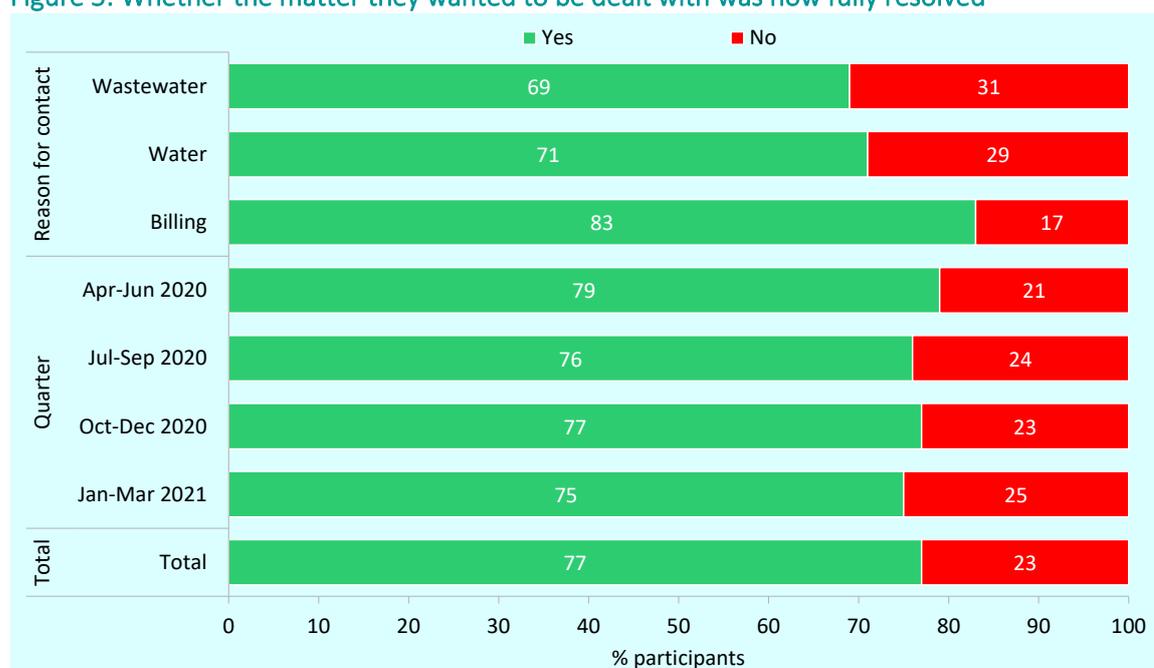
The sample were asked whether the matter they wanted to be dealt with was now fully resolved.

Overall, 77% said the matter was fully resolved and 23% that it wasn't.

Billing queries were significantly¹³ more likely to be resolved than water or waste water queries: 83% compared to 71% water and 69% waste water.

Analysis by quarter shows that the resolution was significantly higher in the first quarter (79%) than in the 2nd (76%) or 4th (75%) quarters.

Figure 5: Whether the matter they wanted to be dealt with was now fully resolved



Weighted base: total 13,959; Quarter: Apr-Jun 2020 3,494, Jul-Sep 2020 3,476, Oct-Dec 2020 3,491, Jan-Mar 2021 3,498; Reason for contact: Billing 6,980, Water 4,709, Wastewater 2,270

Industry CSS 'Customer Satisfaction' (CSAT) results

Participants were asked to rate their recent experience with their water company. The question asked was:

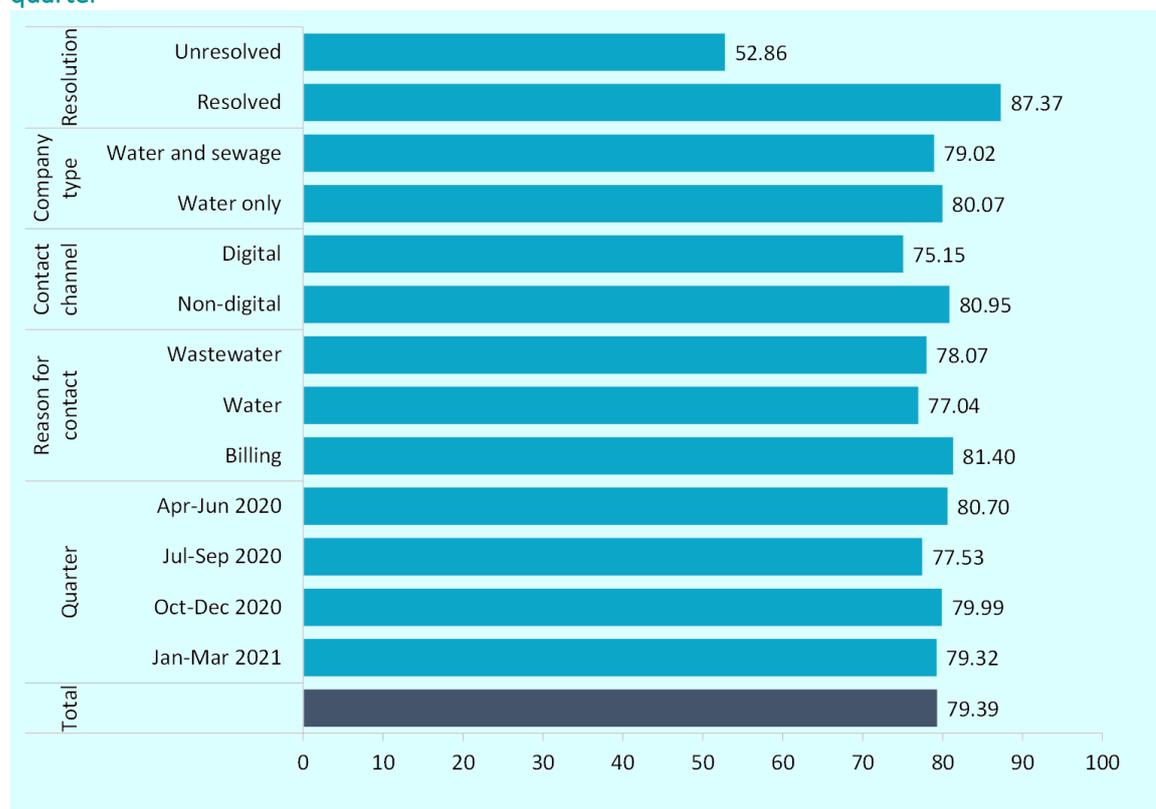
"Taking everything into account how satisfied are you with your recent experience with [Water Company]? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied."

The scores have been adjusted to a scale of 0-100. The industry average for overall satisfaction is 79.39. Figure 6 shows the mean satisfaction score for the overall sample and

¹³ At the 95% confidence level

also by company type, survey type, reason for contact and quarter. All significant differences are highlighted in the text below the figure.

Figure 6: Mean CSS CSAT by resolution, company type, contact channel, reason for contact and quarter



Weighted base: Total, 13,959; Quarter: Jan-Mar 2021 3,498, Oct-Dec 2020 3,491, Jul-Sep 2020 3,476, Apr-Jun 2020 3,494; Reason for contact: Billing 6,980, Water, 4,709, Wastewater, 2,270; Contact channel: Non-digital 10,193, Digital 3,766; Company type: Water only 4,878, Water and sewage 9,081; Resolution: unresolved 3,228, resolved 10,731

As would be expected, those who consider their query to be resolved are significantly¹⁴ more likely to be satisfied with their recent experience than those who consider it unresolved: 87.37 compared to 52.86.

Customers of water only companies were significantly more likely to be satisfied with their recent experience compared to customers of water and waste water only companies: 80.07 compared to 79.02.

The non-digital contacts were significantly more likely to be satisfied with their recent experience compared to the digital contacts: 80.95 compared to 75.15.

Those with a billing query are significantly more likely to be satisfied with their recent experience compared to those with a water or waste water query (81.40 compared to 77.04 for water and 78.07 for waste water).

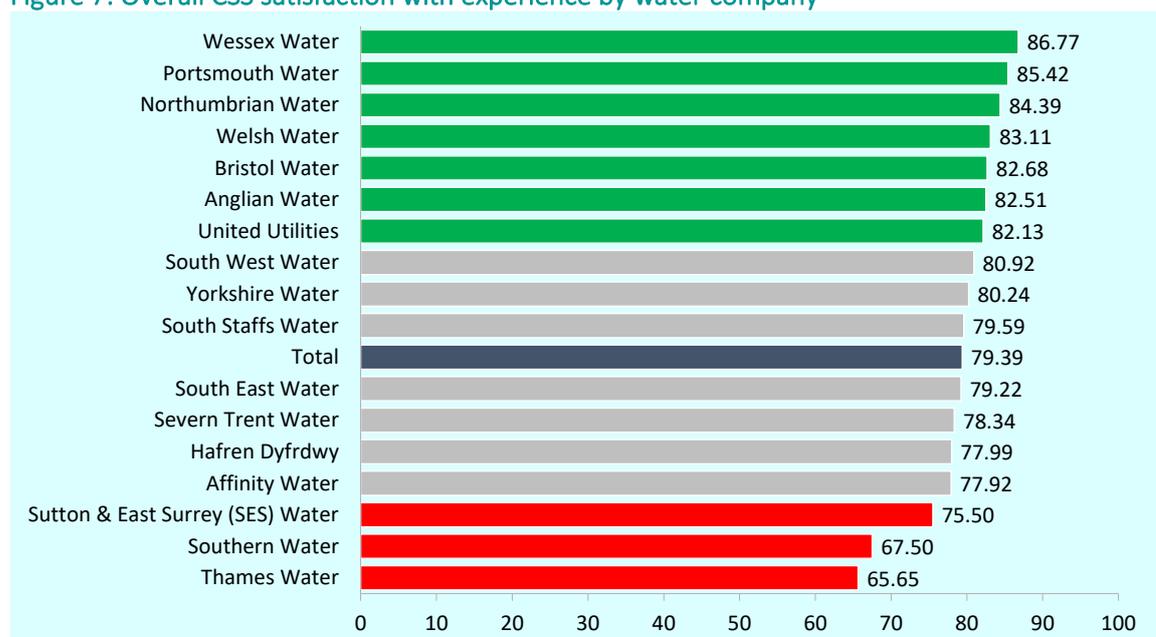
¹⁴ At the 95% confidence level

The second quarter had a statistically lower mean satisfaction rate than the first and third quarters.

Analysis of the annual mean CSS CSAT score by water company shows that Wessex Water has the highest, and is significantly higher than the industry average, as are Portsmouth Water, Northumbrian Water, Welsh Water, Bristol Water, Anglian Water and United Utilities (all shown with green bars in Figure 7).

Thames Water has the lowest mean CSS CSAT and is significantly below the industry average, along with Southern Water and Sutton & East Surrey (SES) Water (all shown with red bars in Figure 7).

Figure 7: Overall CSS satisfaction with experience by water company



Weighted base: Total 13,959, Thames Water 813, Southern Water 814, Sutton & East Surrey (SES) Water 811, Affinity Water 814, Hafren Dyfrdwy 917, Severn Trent Water 870, South East Water 810, South Staffs Water 806, Yorkshire Water 799, South West Water 815, United Utilities 816, Anglian Water 811, Bristol Water 815, Welsh Water 809, Northumbrian Water 803, Portsmouth Water 822, Wessex Water 814

What companies are doing well

Participants who gave a score of 9 or 10 (equivalent to 90% or 100% in the figures above), 57% of the sample, were asked: “What did they do well?”

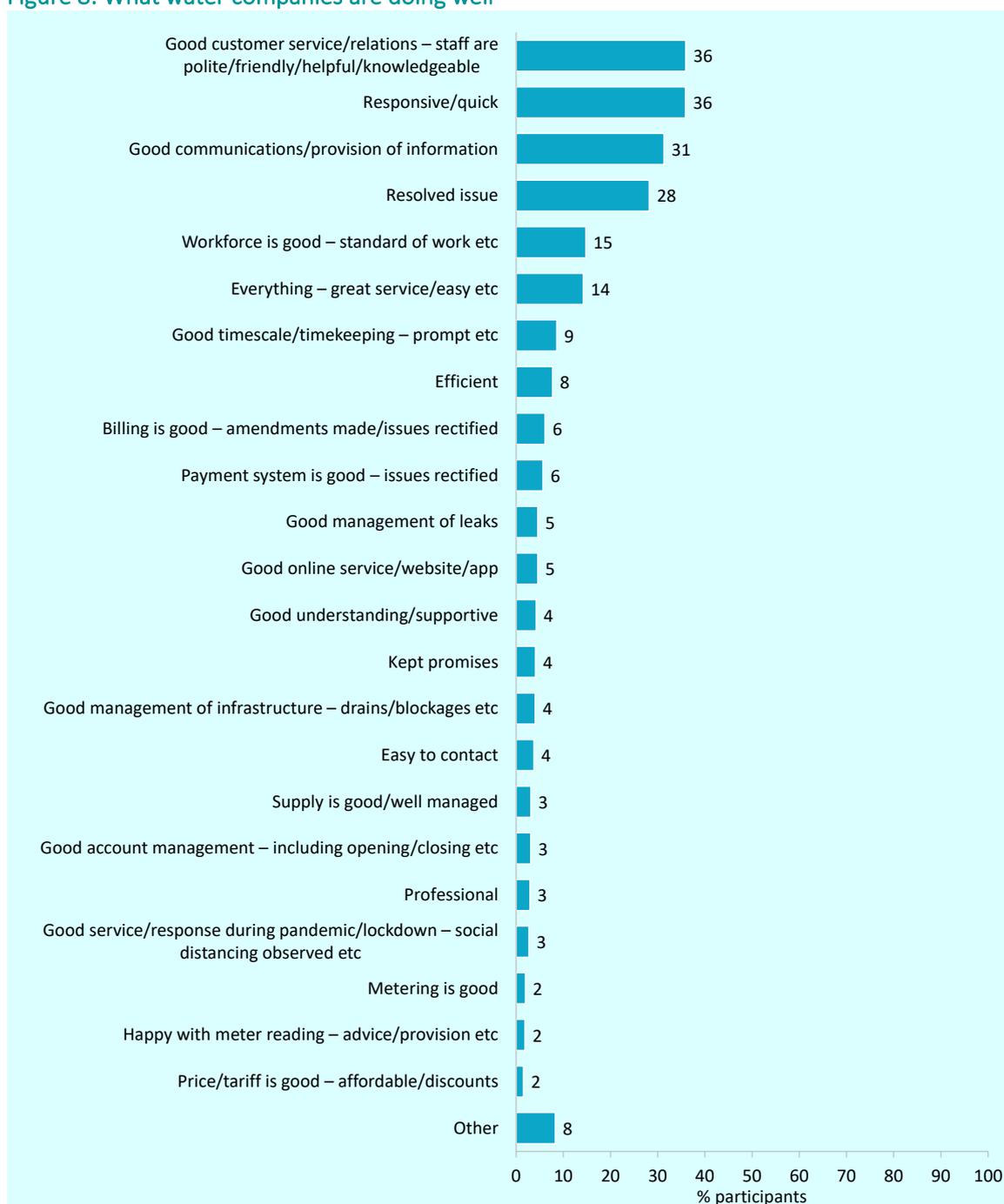
The open responses were coded to a thematic code frame (see Appendix D). Figure 8 shows all responses that account for 2% or more of coded responses.

The main two responses (36% each) were ‘good customer service/relations – staff are polite/friendly/helpful/knowledgeable’ and ‘responsive/quick’. Also important were:

- Good communications/provision of information (31%)
- Resolved issue (28%)

- Workforce is good – standard of work etc (15%)
- Everything – great service/easy etc (14%).

Figure 8: What water companies are doing well



Weighted base: 8,263 who gave a score a satisfaction of 9 or 10. The base includes 207 responses recoded from the following question.

Note: all response categories of 2% and over shown. More than one response code could be assigned to each open response so percentages sum to more than 100%

What water companies could do to improve

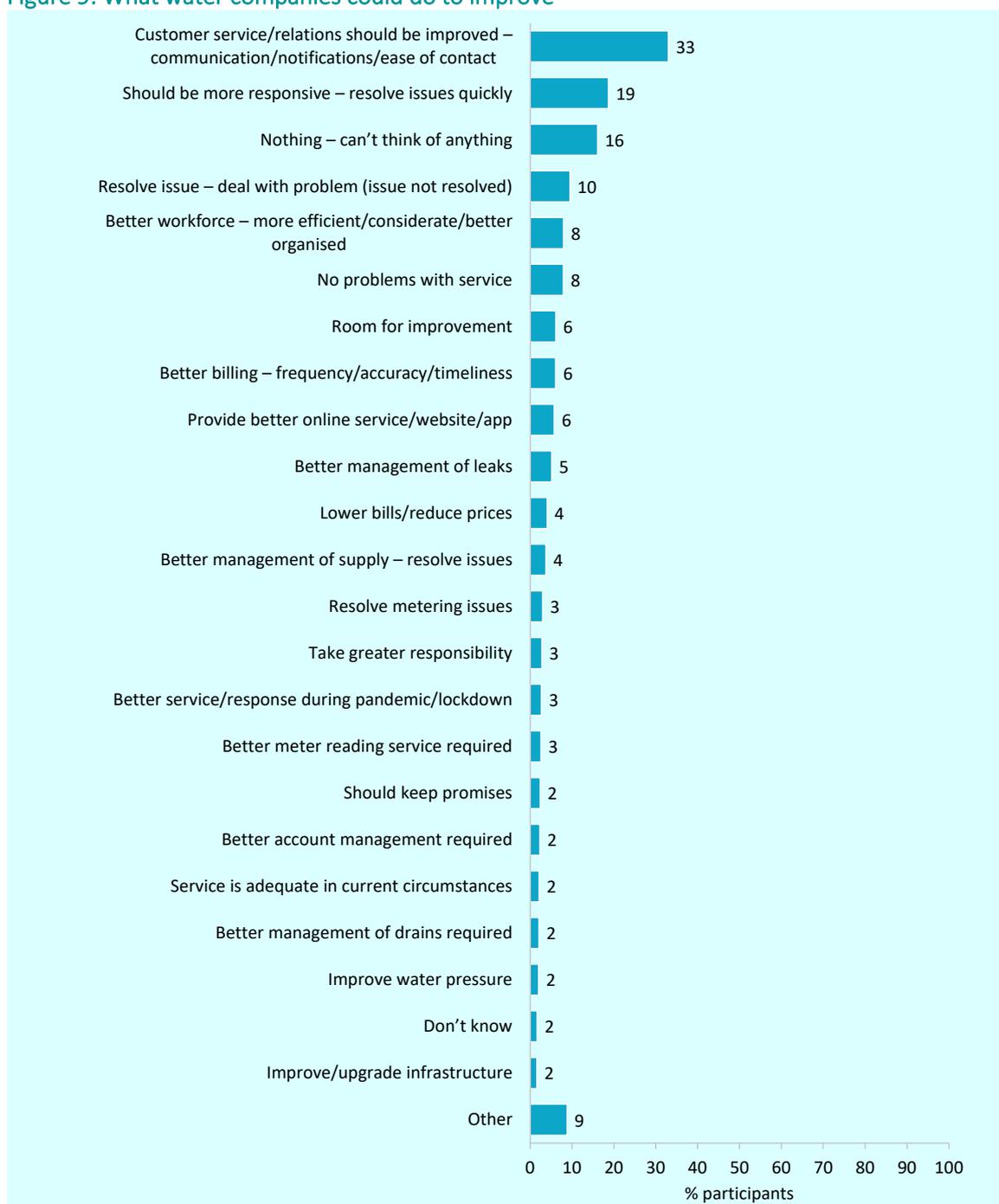
Participants who gave a score of 7 or 8 (equivalent to 70% or 80% in the figures above) 19% of the sample, were asked: “What could they have done to improve this score?”

The open responses were coded to a thematic code frame (see Appendix D). Figure 9 shows all responses that account for 2% or more of coded responses.

The main response, cited by a third, was 'customer service/relations should be improved – communication/notifications/ease of contact'. Also important were:

- Should be more responsive – resolve issues quickly (19%)
- Nothing – can't think of anything (16%)
- Resolve issue – deal with problem (issue not resolved) (10%).

Figure 9: What water companies could do to improve



Weighted base: 2,754 who gave a score a satisfaction of 7 or 8. The base includes 93 responses recorded from the previous question.

Note: all response categories of 2% and over shown. More than one response code could be assigned to each open response so percentages sum to more than 100%

Areas for improvement

Participants who gave a score of 0 or 6 (equivalent to 0% to 60% in the figures above), 24% of the sample, were asked: “What could they have done better?”

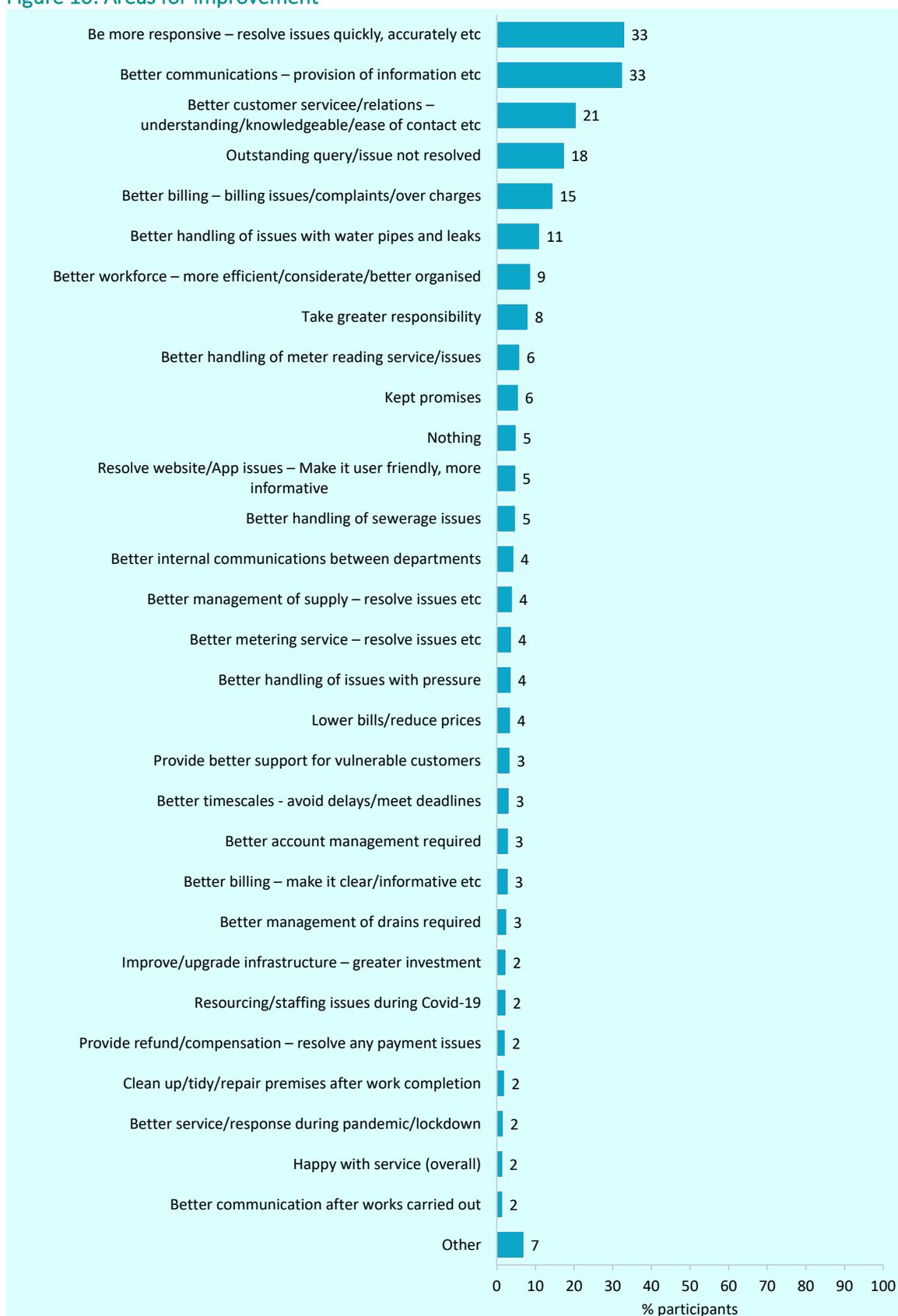
The open responses were coded to a thematic code frame (see Appendix D). Figure 10 shows all responses that account for 2% or more of coded responses.

The main two responses, mentioned by a third each, were 'be more responsive – resolve issues quickly, accurately etc' and 'better communications – provision of information etc'.

The following were also important areas for improvements:

- Better customer service/relations – understanding/knowledgeable/ease of contact etc (21%)
- Outstanding query/issue not resolved (18%)
- Better billing – billing issues/complaints/over charges (15%)
- Better handling of issues with water pipes and leaks (11%).

Figure 10: Areas for improvement



Weighted base: 3,314 who gave a score a satisfaction of 0 to 6. The base includes some responses recoded from the previous two questions.

Note: all response categories of 2% and over shown. More than one response code could be assigned to each open response so percentages sum to more than 100%

Likelihood to recommend

Participants were then asked to indicate how likely they would be to recommend the water company to friends and family. The responses do not influence the C-MeX score.

The question asked was:

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

The scores have been adjusted to a scale of 0-100. The overall annual mean recommendation score is 78. Figure 11 shows the mean recommendation score for the overall sample and also by quarter and company type.

As would be expected, those who consider their query to be resolved gave a significantly¹⁵ higher mean recommendation score than those who consider it unresolved: 84.70 compared to 55.90.

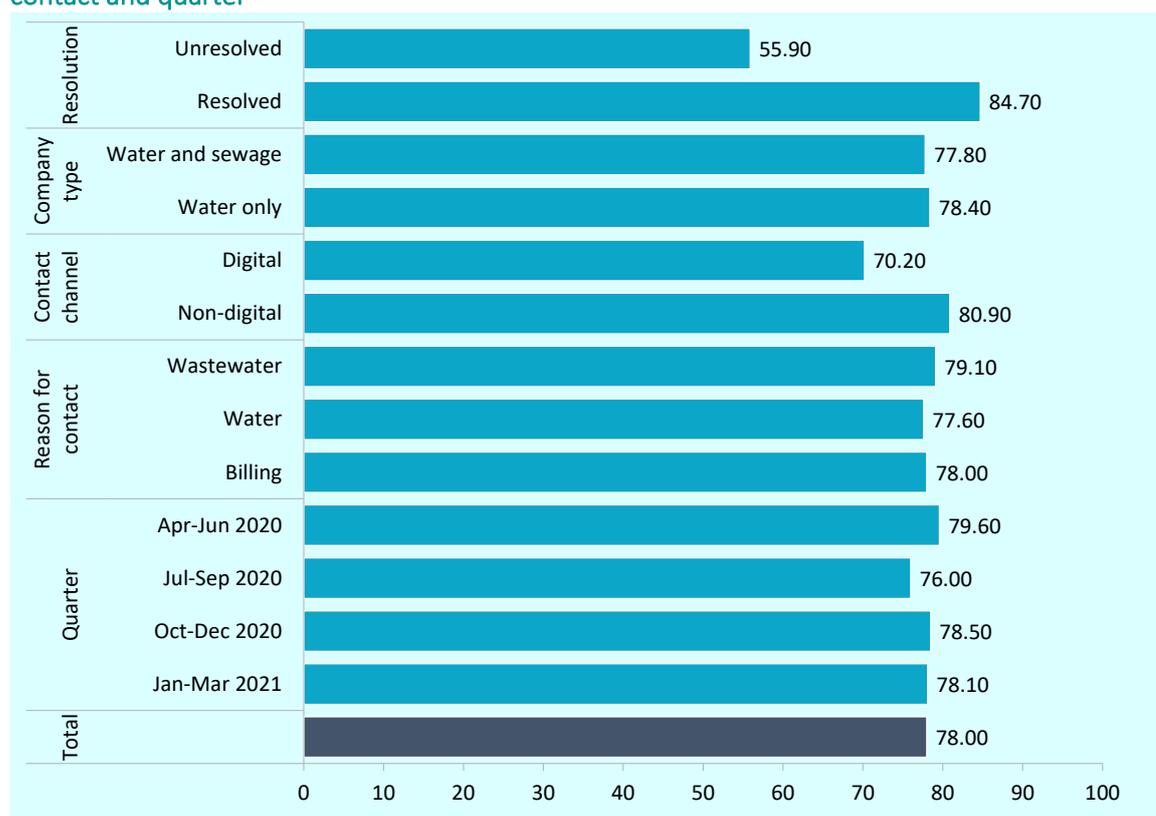
The Non-digital sample gave a significantly higher recommendation score than the digital sample: 80.90 compared to 70.20.

The second quarter had a statistically lower mean satisfaction rate than the first, third and fourth quarters.

There were no statistically significant¹⁵ differences in the mean recommendation score by company type or reason for contact.

¹⁵ At the 95% confidence level

Figure 11: CSS likelihood to recommend by resolution, company type, contact channel, reason for contact and quarter

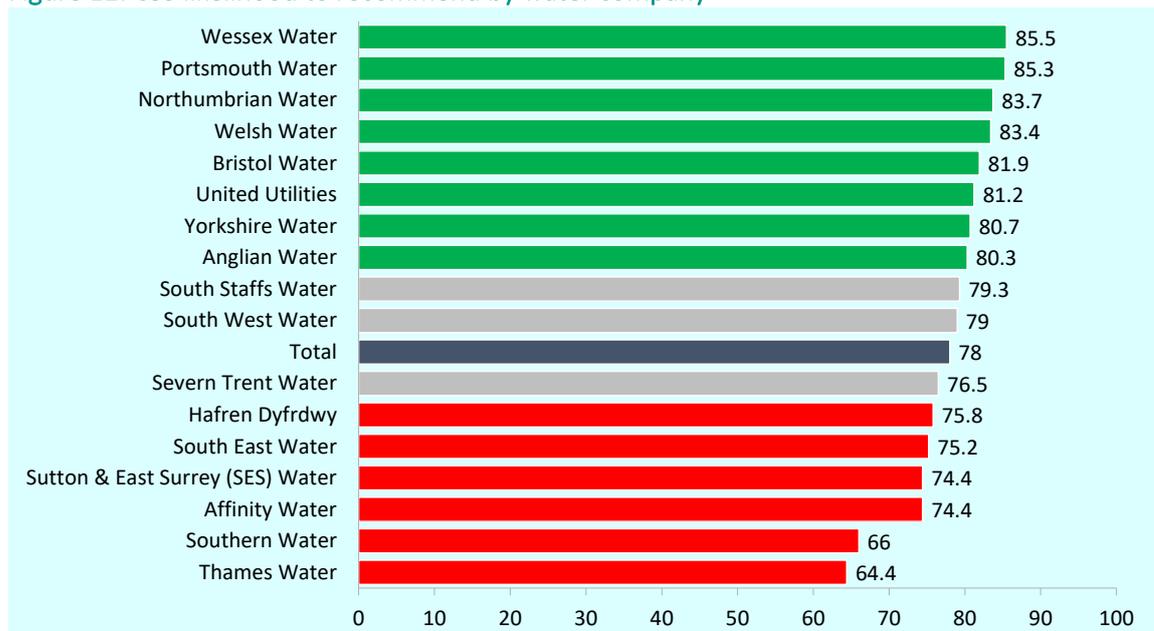


Weighted base: Total, 13,959; Quarter: Jan-Mar 2021 3,498, Oct-Dec 2020 3,491, Jul-Sep 2020 3,476, Apr-Jun 2020 3,494; Reason for contact: Billing 6,980, Water, 4,709, Wastewater, 2,270; Contact channel: Non-digital 10,193, Digital 3,766; Company type: Water only 4,878, Water and sewage 9,081; Resolution: unresolved 3,228, resolved 10,731

Analysis of the annual mean recommendation score by water company shows that Wessex Water has the highest mean satisfaction score and is significantly higher than the industry average, as are Portsmouth Water, Northumbrian Water, Welsh Water, Bristol Water, United Utilities, Yorkshire Water and Anglian Water (all shown with green bars in Figure 12).

Thames Water has the lowest mean satisfaction score and is significantly below the industry average, along with Southern Water, Affinity Water, Sutton & East Surrey (SES) Water, South East Water and Hafren Dyfrdwy (all shown with red bars in Figure 12).

Figure 12: CSS likelihood to recommend by water company



Weighted base: Total 13,959, Thames Water 813, Southern Water 814, Affinity Water 814, Sutton & East Surrey (SES) Water 811, South East Water 810, Hafren Dyfrdwy 917, Severn Trent Water 870, South West Water 815, South Staffs Water 806, Anglian Water 811, Yorkshire Water 799, United Utilities 816, Bristol Water 815, Welsh Water 809, Northumbrian Water 803, Portsmouth Water 822, Wessex Water 814

3.3 Customer Experience Survey (CES)

This section sets out the results from the Customer Experience Survey (CES). The total annual sample size was 13,609.

Industry CES ‘Customer Satisfaction’ (CSAT) results

Participants were asked to rate their experience with their water company. The question asked was:

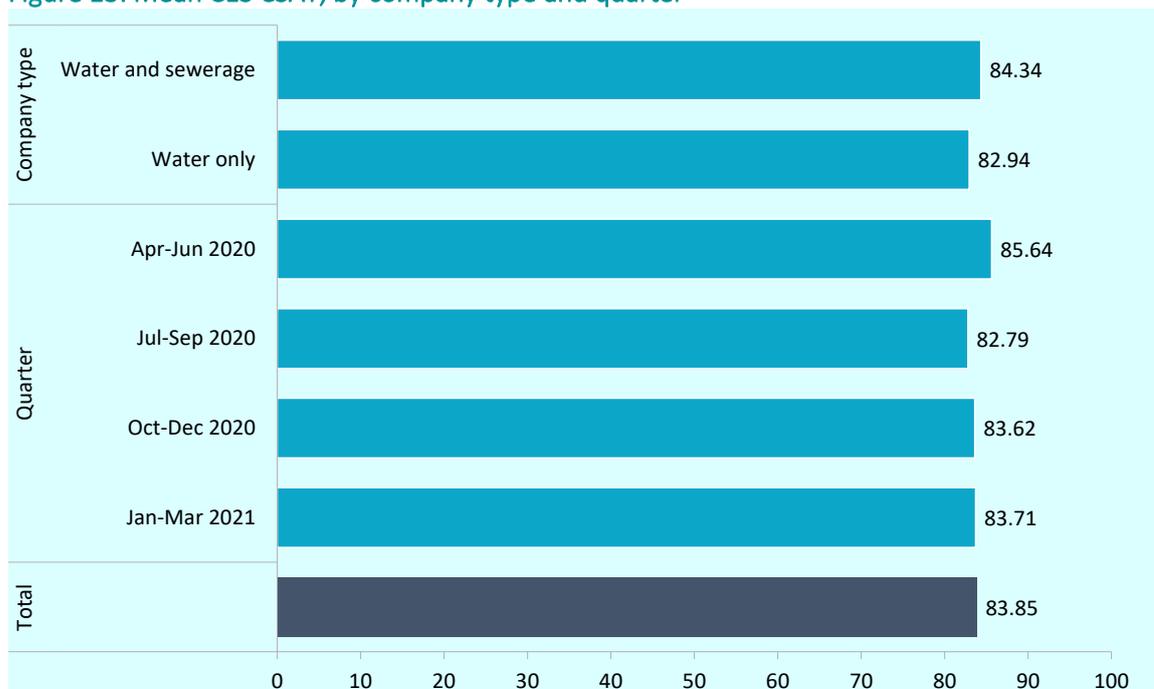
“Throughout this survey, please only think about your domestic water services.

I would now like you to think about your experience of [Water Company].

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

The scores have been adjusted to a scale of 0-100. The industry average for overall satisfaction is 83.85. Figure 13 shows the mean satisfaction score for the overall sample and also by quarter and company type. All significant differences are highlighted in the text below the figure.

Figure 13: Mean CES CSAT, by company type and quarter



Weighted base: Total 13,609; Quarter: Jan-Mar 2021 3,315, Oct-Dec 2020 3,497, Jul-Sep 2020 3,850, Apr-Jun 2020 2,947; Company type: Water only 4,806, Water and sewerage 8,803

Satisfaction in the first quarter was significantly higher¹⁶ than for the other three quarters. Although not significant, satisfaction levels have been rising from Quarter 2 to Quarter 4.

The satisfaction level for Water and sewerage companies was significantly higher than for water only companies.

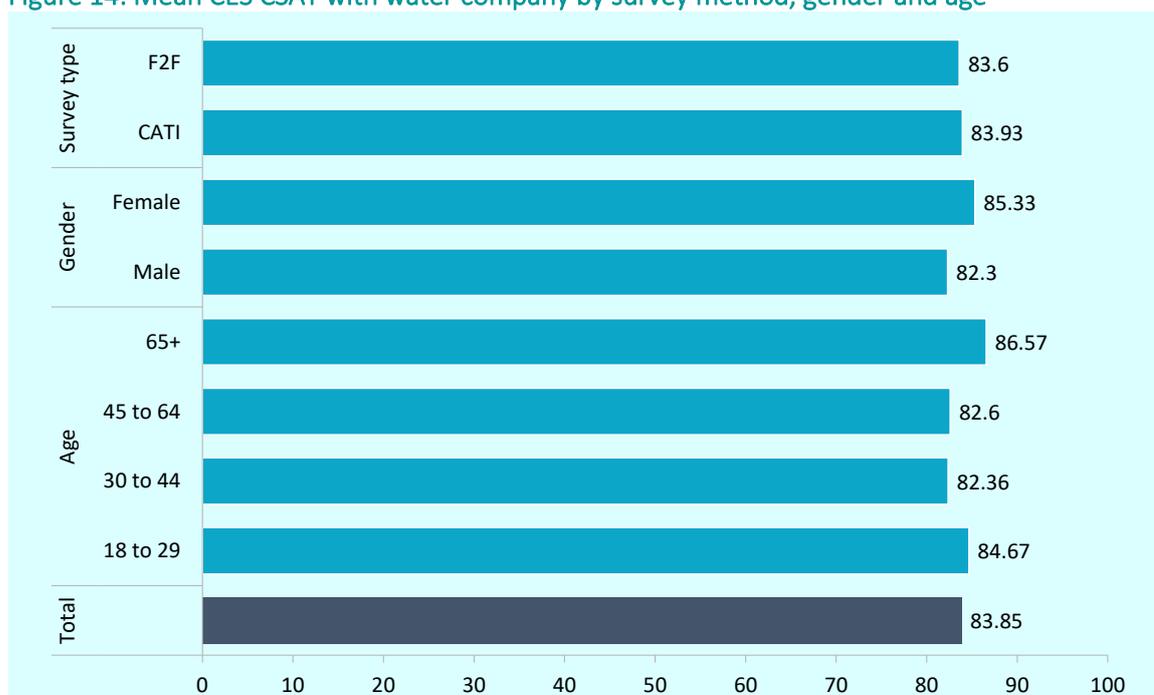
Analysis of the mean satisfaction by age, gender survey method shows the following significant differences:

- Women are significantly more satisfied with the water company than men (85.33 compared to 82.30)
- Older participants (aged 65 and over) are significantly more satisfied with the water company than younger participants: 86.57 compared to 82.6 for 45-64, 82.36 for 30-44 and 84.67 for 18-29. The youngest age group (18-29) are significantly more satisfied than those aged 30 to 64.

There was no significant difference by survey method. See Figure 14.

¹⁶ At the 95% confidence level

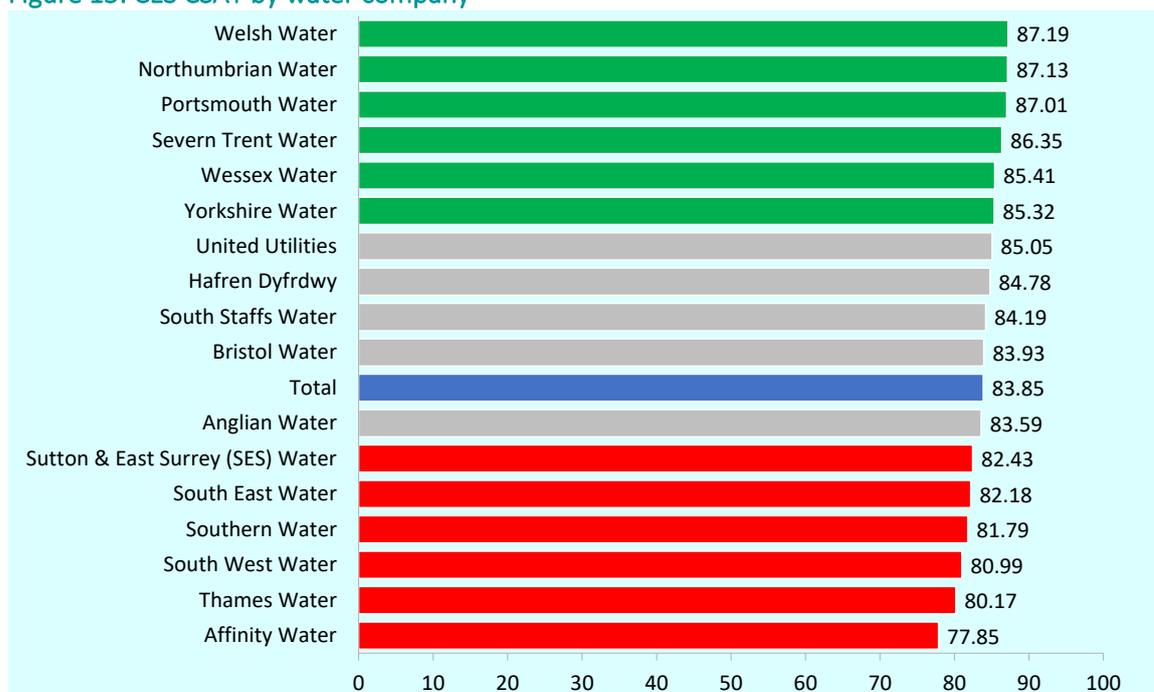
Figure 14: Mean CES CSAT with water company by survey method, gender and age



Weighted base: Total 13,609; Age: 18 to 29 2,586, 30 to 44 3,402, 45 to 64 4,491, 65+ 3,130; Gender: Male 6,667, Female 6,938; Survey type: CATI 10,191, F2F 3,418

Analysis of the annual mean CES CSAT score by water company shows that Welsh Water has the highest mean satisfaction score and is significantly higher than the industry average, as are Northumbrian Water, Portsmouth Water, Severn Trent Water, Wessex Water and Yorkshire Water (all shown with green bars in Figure 15). Affinity Water has the lowest mean satisfaction score and is significantly below the industry average, along with Thames Water, South West Water, Southern Water, South East Water and Sutton & East Surrey (SES) Water (all shown with red bars in Figure 15).

Figure 15: CES CSAT by water company



Weighted base: Total13,609, Affinity Water 800, Thames Water 800, South West Water 801, Southern Water 800, South East Water 800, Sutton & East Surrey (SES) Water 800, Anglian Water 800, Bristol Water 802, South Staffs Water 800, Hafren Dyfrdwy 801, United Utilities 800, Yorkshire Water 800, Wessex Water 800, Severn Trent Water 800, Portsmouth Water 804, Northumbrian Water 800, Welsh Water 801

What companies are doing well

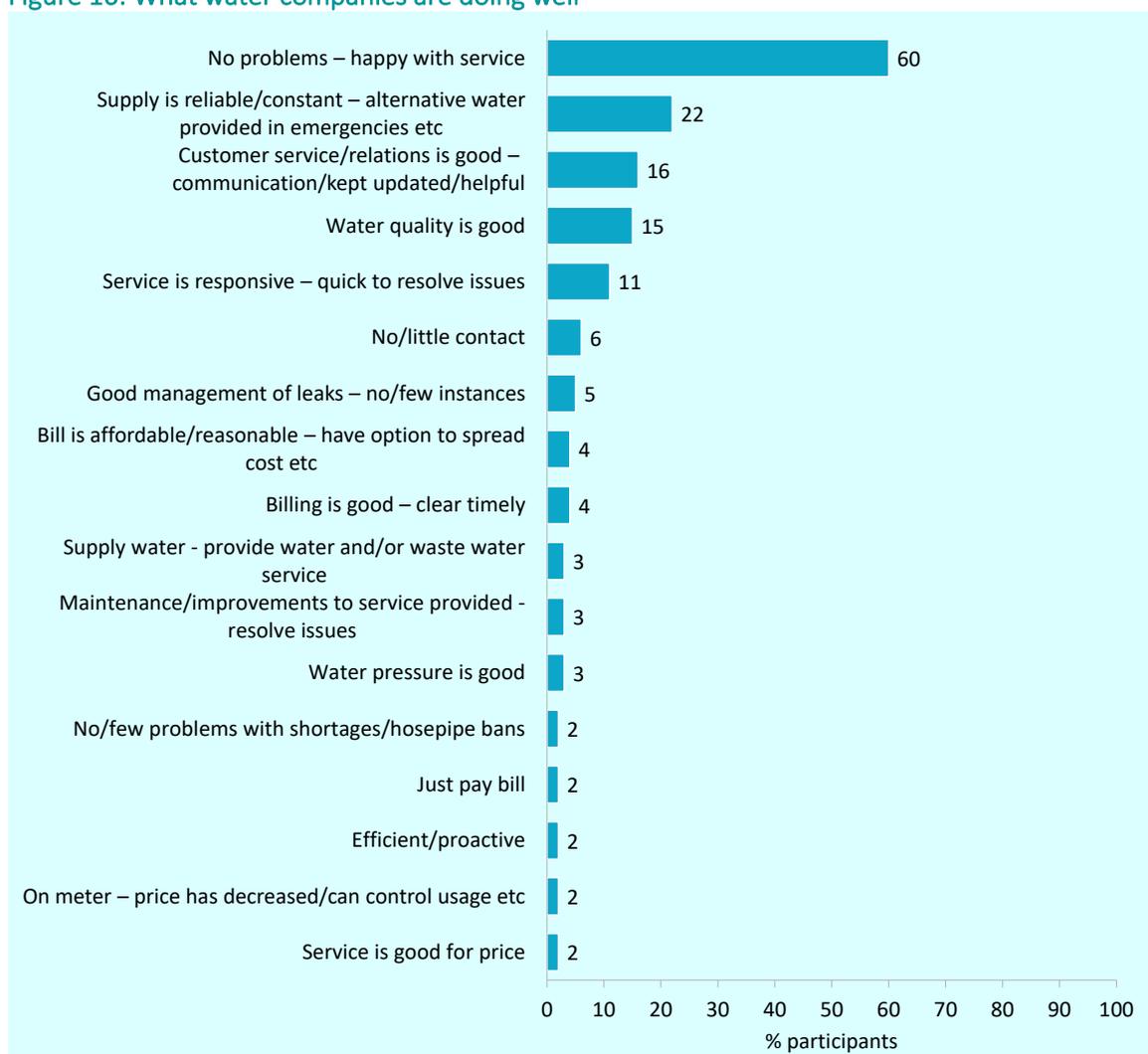
Participants who gave a score of 9 or 10 (equivalent to 90% or 100% in the figures above), 55% of the sample, were asked: “What did they do well?”

The open responses were coded to a thematic code frame (see Appendix D). Figure 16 shows all responses that account for 2% or more of coded responses.

The main response by far was that there were no problems, they were happy with the service (60% of coded responses). Also important were:

- Supply is reliable/constant – alternative water provided in emergencies etc (22%)
- Customer service/relations is good – communication/kept updated/helpful (16%)
- Water quality is good (15%)
- Service is responsive – quick to resolve issues (11%).

Figure 16: What water companies are doing well



Weighted base: 7,443 who gave a score a satisfaction of 9 or 10

Note: Other response codes sum to 24%. More than one response code could be assigned to each open response so percentages sum to more than 100%

What water companies could do to improve

Participants who gave a score of 7 or 8 (equivalent to 70% or 80% in the figures above) 31% of the sample, were asked: “What could they have done to improve this score?”

The open responses were coded to a thematic code frame (see Appendix D). Figure 17 shows all responses that account for 2% or more of coded responses.

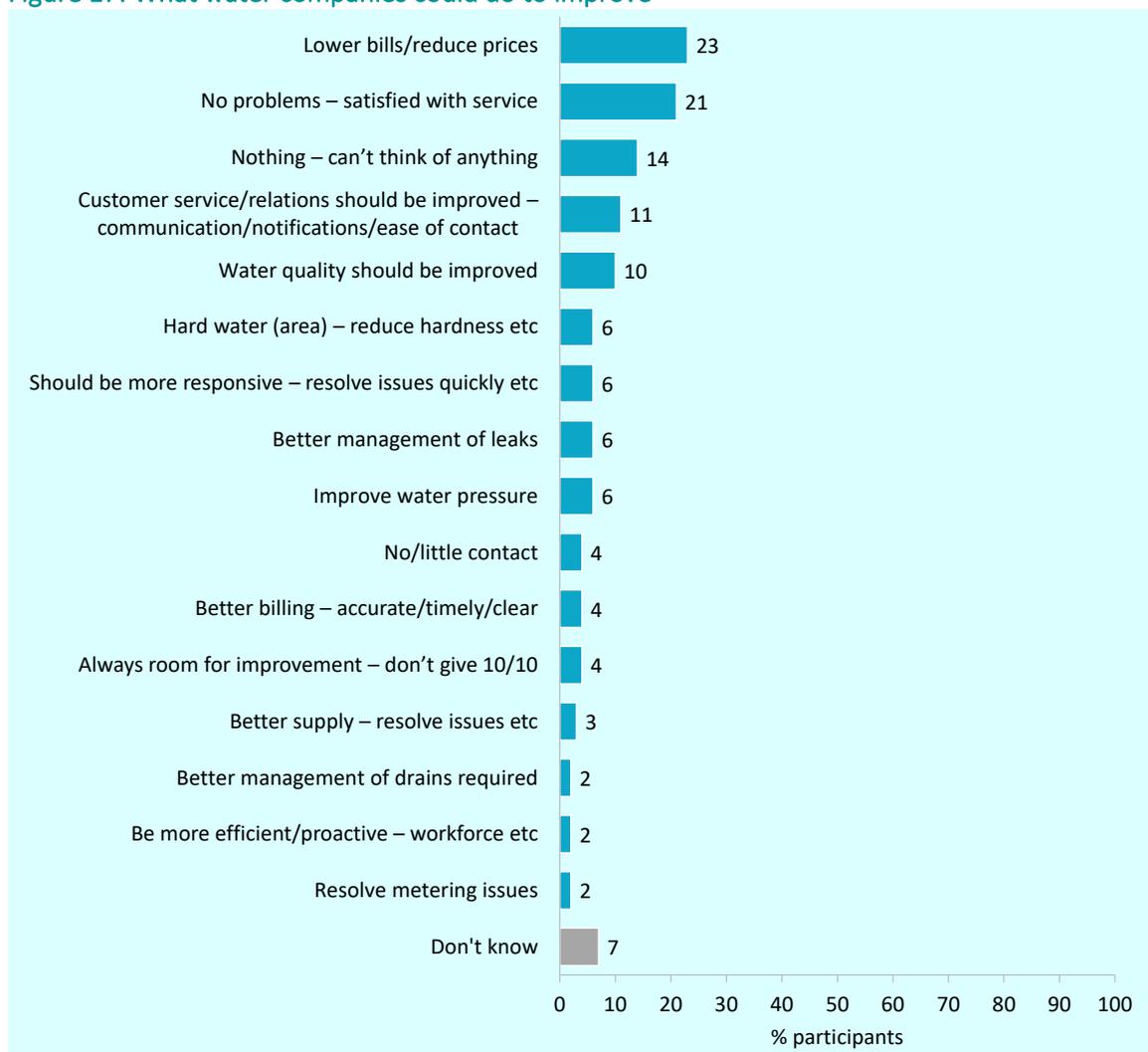
Over a fifth (21%) were coded as ‘No problems, satisfied with the service’ and 14% as ‘Nothing – can’t think of anything’.

The main concerns were:

- Lower bills/reduce prices (23%)
- Customer service/relations should be improved – communication/notifications/ease of contact (11%)

- Water quality should be improved (10%).

Figure 17: What water companies could do to improve



Weighted base: 4,283 who gave a score a satisfaction of 7 or 8

Note: Other response codes sum to 16%. More than one response code could be assigned to each open response so percentages sum to more than 100%

Areas for improvement

Participants who gave a score of 0 or 6 (equivalent to 0% to 60% in the figures above), 14% of the sample, were asked: “What could they have done better?”

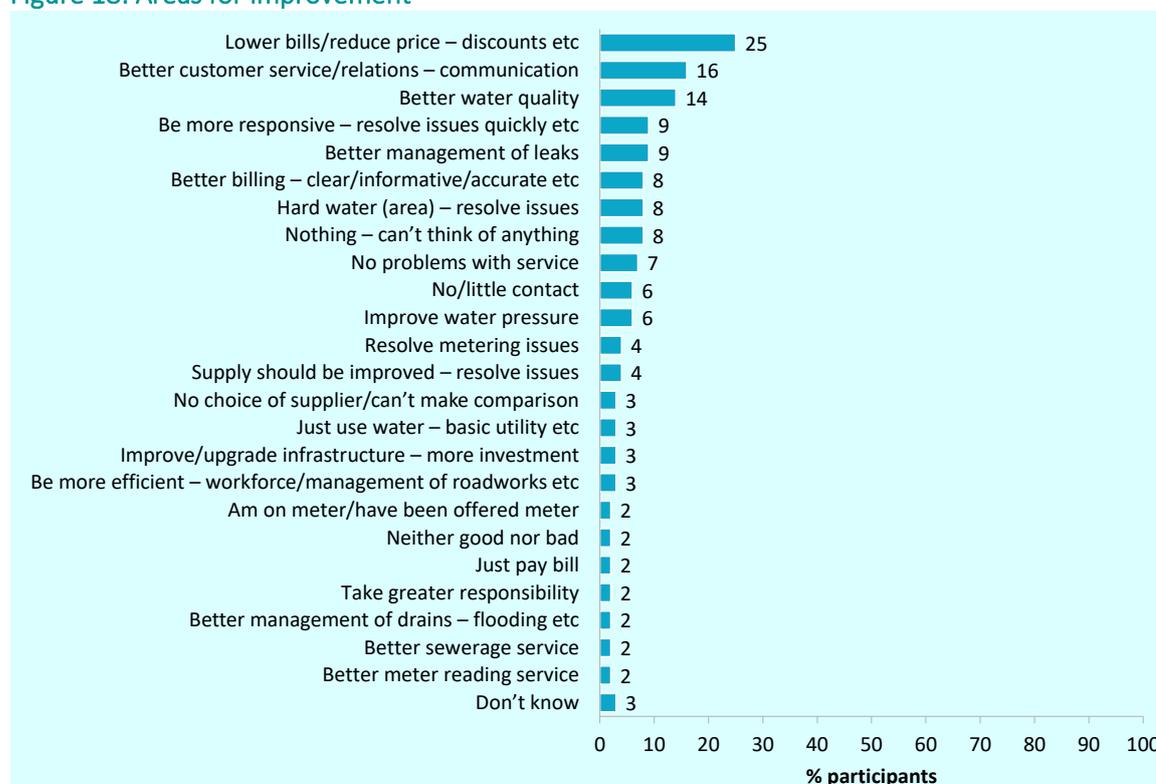
The open responses were coded to a thematic code frame (see Appendix D). Figure 18 shows all responses that account for 2% or more of coded responses.

The main areas for improvement, mentioned by a quarter was to do with the cost: ‘Lower bills/reduce price – discounts etc’

Also important were:

- Better customer service/relations – communication (16%)
- Better water quality (14%)
- Be more responsive – resolve issues quickly etc (9%)
- Better management of leaks (9%)
- Better billing – clear/informative/accurate etc (8%)
- Hard water (area) – resolve issues (8%).

Figure 18: Areas for improvement



Weighted base: 1,882 who gave a score a satisfaction of 0 to 6

Note: Other response codes sum to 8%. More than one response code could be assigned to each open response so percentages sum to more than 100%

Likelihood to recommend

Participants were then asked to indicate how likely they would be to recommend the water company to friends and family. The responses do not influence the C-MeX score.

The question asked was:

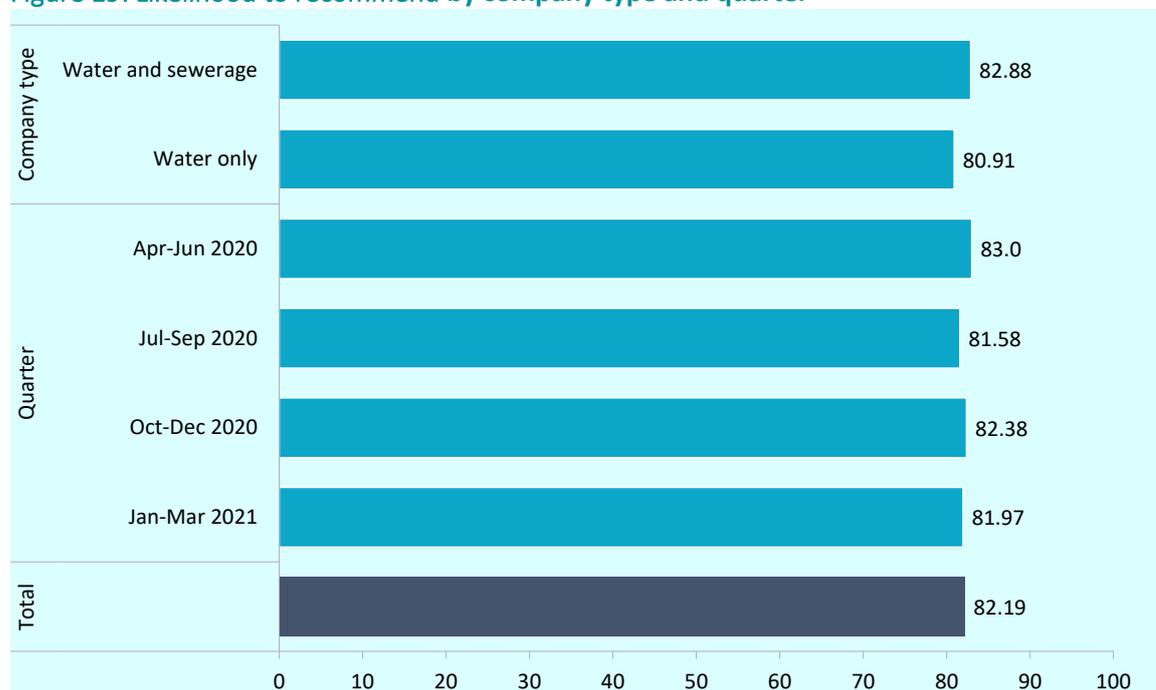
“If you could choose your water provider, based on your recent experience, how likely would you be to recommend [Water Company] to friends and family? Please use a scale of 0-10, where 0=not at all likely and 10=extremely likely.”

The scores have been adjusted to a scale of 0-100. The overall annual mean recommendation score is 82.19. Figure 19 shows the mean recommendation score for the overall sample and also by quarter and company type.

The mean recommendation score for Water and sewerage companies was significantly higher than for water only companies.

There were no statistically significant¹⁷ differences in the mean recommendation score by quarter.

Figure 19: Likelihood to recommend by company type and quarter



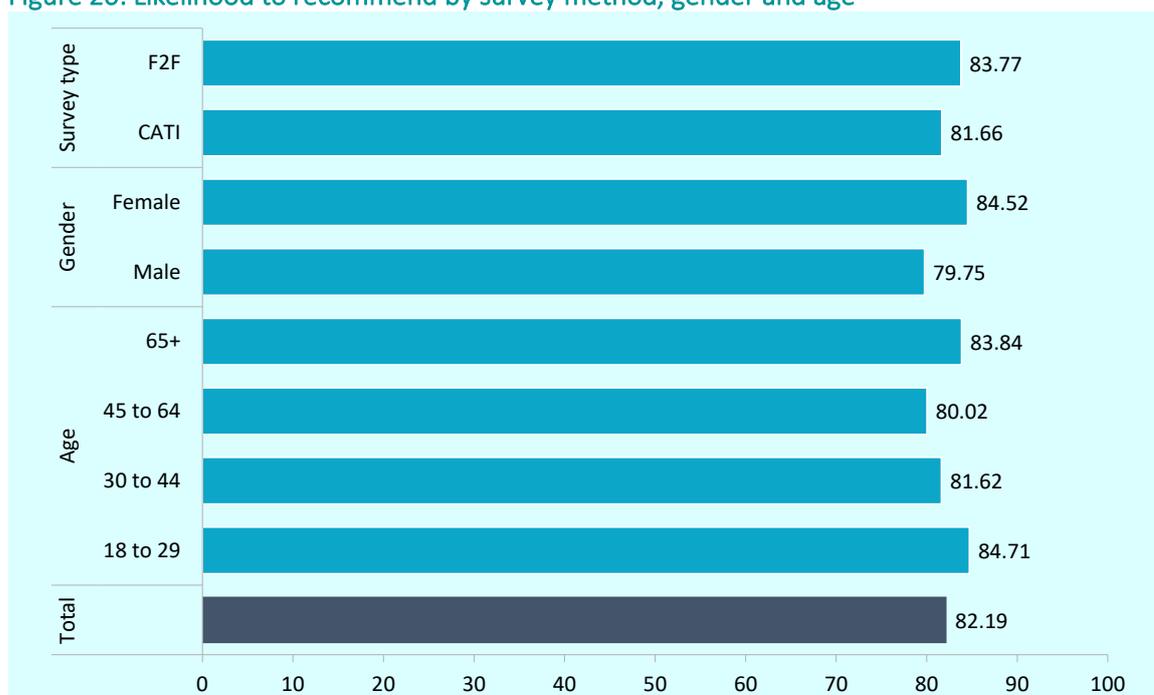
Weighted base: Total 13,609; Quarter: Jan-Mar 2021 3,315, Oct-Dec 2020 3,497, Jul-Sep 2020 3,850, Apr-Jun 2020 2,947; Company type: Water only 4,806, Water and sewerage 8,803

Analysis of the mean recommendation score by age, gender survey method shows the following significant differences:

- Women were significantly more likely to recommend the water company than men (83.84 compared to 79.75)
- Older participants (aged 65 and over) and younger participants (18-29) were significantly more likely to recommend the water company than participants aged 30 to 64: 65+ 83.34 and 18-29 84.71 compared to 30-44 81.62 and 45-64 80.02
- Those interviewed face-to-face were significantly more likely to recommend the water company than those interviewed by telephone: 83.77 compared to 81.66.

¹⁷ At the 95% confidence level

Figure 20: Likelihood to recommend by survey method, gender and age



Weighted base: Total 13,609; Age: 18 to 29 2,586, 30 to 44 3,402, 45 to 64 4,491, 65+ 3,130; Gender: Male 6,667, Female 6,938; Survey type: CATI 10,191, F2F 3,418

Analysis of the annual likelihood to recommend score by water company shows that Portsmouth Water has the highest mean satisfaction score and is significantly higher than the industry average, as are Welsh Water, Northumbrian Water, Severn Trent Water, Yorkshire Water and Wessex Water (all shown with green bars in Figure 21).

Affinity Water has the lowest mean recommendation score and is significantly below the industry average, along with Thames Water, South West Water, Sutton & East Surrey (SES) Water, Southern Water and South East Water (all shown with red bars in Figure 21).

Figure 21: Likelihood to recommend by water company



Weighted base: Total 13,609, Affinity Water 800, Thames Water 800, South West Water 801, Sutton & East Surrey (SES) Water 800, Southern Water 800, South East Water 800, Bristol Water 802, Hafren Dyfrdwy 801, South Staffs Water 800, Anglian Water 800, Wessex Water 800, United Utilities 800, Yorkshire Water 800, Severn Trent Water 800, Northumbrian Water 800, Welsh Water 801, Portsmouth Water 804

3.4 The C-MeX Survey Score

The final C-MeX survey scores were calculated using the following formula. The CSS and CES CSAT scores were calculated using the re-weighted overall annual data sets:

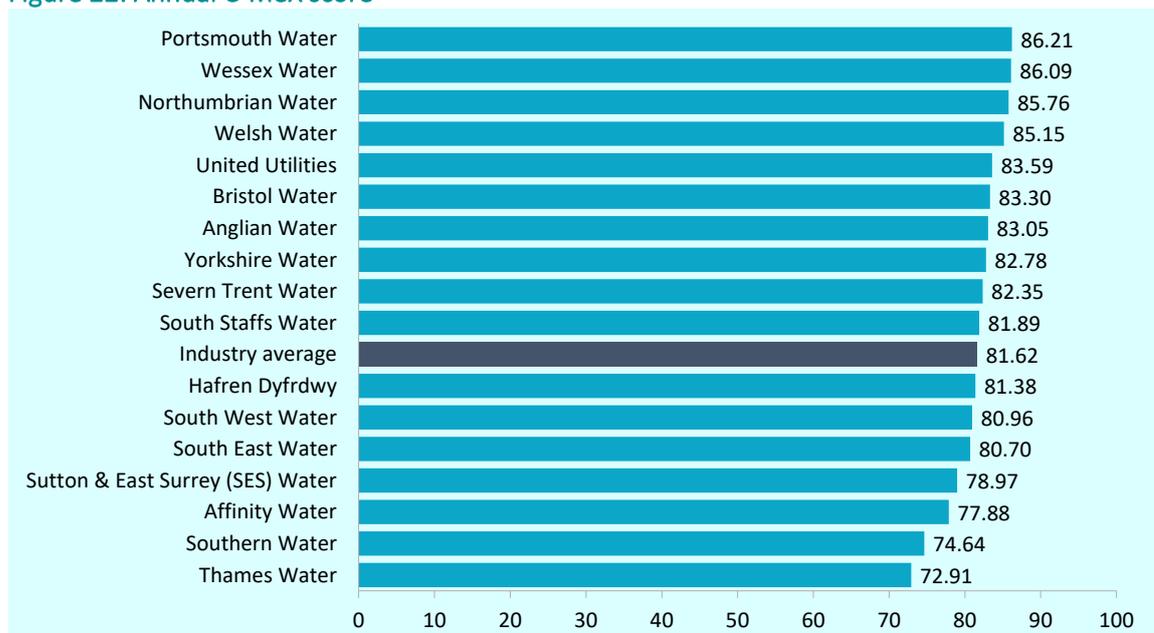
$$\text{C-MeX} = 50\% \text{ CSS CSAT} + 50\% \text{ CES CSAT}$$

These scores were calculated in line with Ofwat's guidance¹⁸. Contrary to the Shadow Year methodology, NPS score is not a factor in the final C-MeX score.

The industry average is 81.62, with scores ranging from 86.21 for Portsmouth Water to 72.91 for Thames Water.

¹⁸ <https://www.ofwat.gov.uk/wp-content/uploads/2020/03/C-MeX-guidance-for-2020-25.pdf>

Figure 22: Annual C-MeX score



The table below shows the total CSAT scores for CCS (along with the separate billing, water and waste water scores) and CES with the C-MeX scores in the final two columns.

Table 11: Annual CCS, CES and C-MeX scores

	CCS								CES		C-MeX	
	Total	Rank	Billing	Rank	Water	Rank	Waste	Rank	CSAT	Rank	Score	Rank
Portsmouth Water	85.42	2	88.68	1	82.16	2	n/a	n/a	87.01	3	86.21	1
Wessex Water	86.77	1	86.79	2	87.39	1	86.10	3	85.41	5	86.09	2
Northumbrian Water	84.39	3	84.51	6	80.34	7	88.19	1	87.13	2	85.76	3
Welsh Water	83.11	4	82.83	9	80.41	6	86.38	2	87.19	1	85.15	4
United Utilities	82.13	7	85.61	3	75.85	12	81.45	4	85.05	7	83.59	5
Bristol Water	82.68	5	85.60	4	79.75	8	n/a	n/a	83.93	10	83.30	6
Anglian Water	82.51	6	84.53	5	80.54	5	80.43	6	83.59	11	83.05	7
Yorkshire Water	80.24	9	83.70	8	80.59	4	72.99	9	85.33	6	82.78	8
Severn Trent Water	78.34	12	83.90	7	71.94	15	73.64	8	86.35	4	82.35	9
South Staffs Water	79.59	10	81.56	12	77.63	9	n/a	n/a	84.19	9	81.89	10
Industry average	79.39	-	81.40	-	77.04	-	78.07	-	83.85	-	81.62	-
Hafren Dyfrdwy	77.99	13	80.87	13	76.57	11	73.64	7	84.78	8	81.38	11
South West Water	80.92	8	80.20	14	82.15	3	81.15	5	80.99	15	80.96	12
South East Water	79.22	11	81.86	11	76.57	10	n/a	n/a	82.18	13	80.70	13
Sutton & East Surrey (SES) Water	75.50	15	79.05	15	71.94	14	n/a	n/a	82.43	12	78.97	14
Affinity Water	77.92	14	82.35	10	73.48	13	n/a	n/a	77.85	17	77.88	15
Southern Water	67.50	16	68.55	16	68.73	16	64.17	11	81.79	14	74.64	16
Thames Water	65.65	17	63.19	17	64.69	17	71.52	10	80.18	16	72.91	17

3.5 Net Promoter Scores (NPS)

The CCS and CES each also include a 'likelihood to recommend' question. The responses to these make up the net promoter score for each company.

The net promoter score for each company uses the same weights as the C-MeX score. The communication channels adjustment does not apply.

The net promoter score was calculated as follows:

Net promoter score = % promoters - % detractors where:

- **promoters** are those customers that give a rating of 9 or 10
- **detractors** are those customers that give a rating of 0, 1, 2, 3, 4, 5 or 6.

Customers that gave a rating of 7 or 8 were excluded.

The table below shows the total annual NPS scores for CCS (along with the separate billing, water and waste water scores) and CES.

Table 12: Annual CCS and CES NPS scores

	CCS								CES	
	Total	Rank	Billing	Rank	Water	Rank	Waste	Rank	CSAT	Rank
Welsh Water	48	3	41	5	52	2	58	2	55	1
Portsmouth Water	51	1	55	1	48	3	n/a	n/a	52	2
Northumbrian Water	45	4	37	8	40	6	69	1	52	2
Wessex Water	51	1	51	2	54	1	50	3	41	7
Yorkshire Water	41	5	40	6	47	4	34	7	47	5
United Utilities	40	7	42	4	27	11	49	4	42	6
Severn Trent Water	30	11	36	9	17	12	27	8	50	4
Bristol Water	41	5	45	3	37	8	n/a	n/a	35	11
Anglian Water	38	8	38	7	38	7	38	5	37	10
South Staffs Water	33	9	36	9	32	9	n/a	n/a	37	9
Industry average	31	-	31	-	28	-	36	-	37	-
Hafren Dyfrdwy	25	12	21	14	29	10	27	8	38	8
South West Water	33	9	26	11	43	5	36	6	27	14
South East Water	19	13	20	15	17	12	n/a	n/a	29	12
Sutton & East Surrey (SES) Water	16	15	24	12	9	16	n/a	n/a	25	15
Southern Water	1	16	-1	16	10	15	-3	11	28	13
Affinity Water	18	14	23	13	11	14	n/a	n/a	9	17
Thames Water	-6	17	-17	17	-8	17	17	10	19	16

4 D-MeX Qualitative Findings

4.1 What companies are doing well

All participants were asked to say what they thought companies did well in relation to handling their transaction. The question asked was:

*“What do you feel that [Water Company] did **well**, if anything, in relation to this particular transaction?”*

The open responses were coded to a thematic code frame (see Appendix D). Figure 23 shows all responses that account for 2% or more of coded responses.

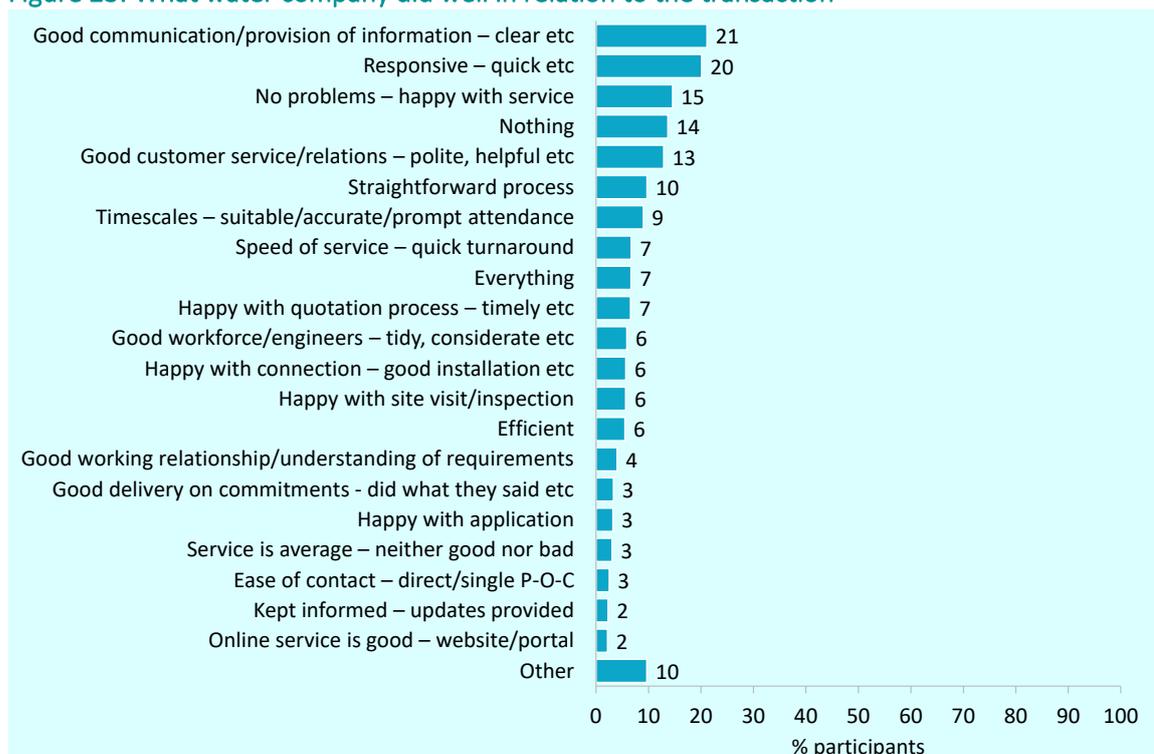
The main responses were that there was good communication/provision of information was clear (21%) and it was responsive/quick (20%).

Fourteen per cent said that nothing was done well.

Also important were:

- No problems – happy with service (15%)
- Good customer service/relations – polite, helpful etc (13%)
- Straightforward process (10%).

Figure 23: What water company did well in relation to the transaction



Base: 11,012

More than one response code could be assigned to each open response so percentages sum to more than 100%

4.2 Areas for improvement

Participants were then given the opportunity to say what could have done better in relation to their transaction. The question asked was:

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

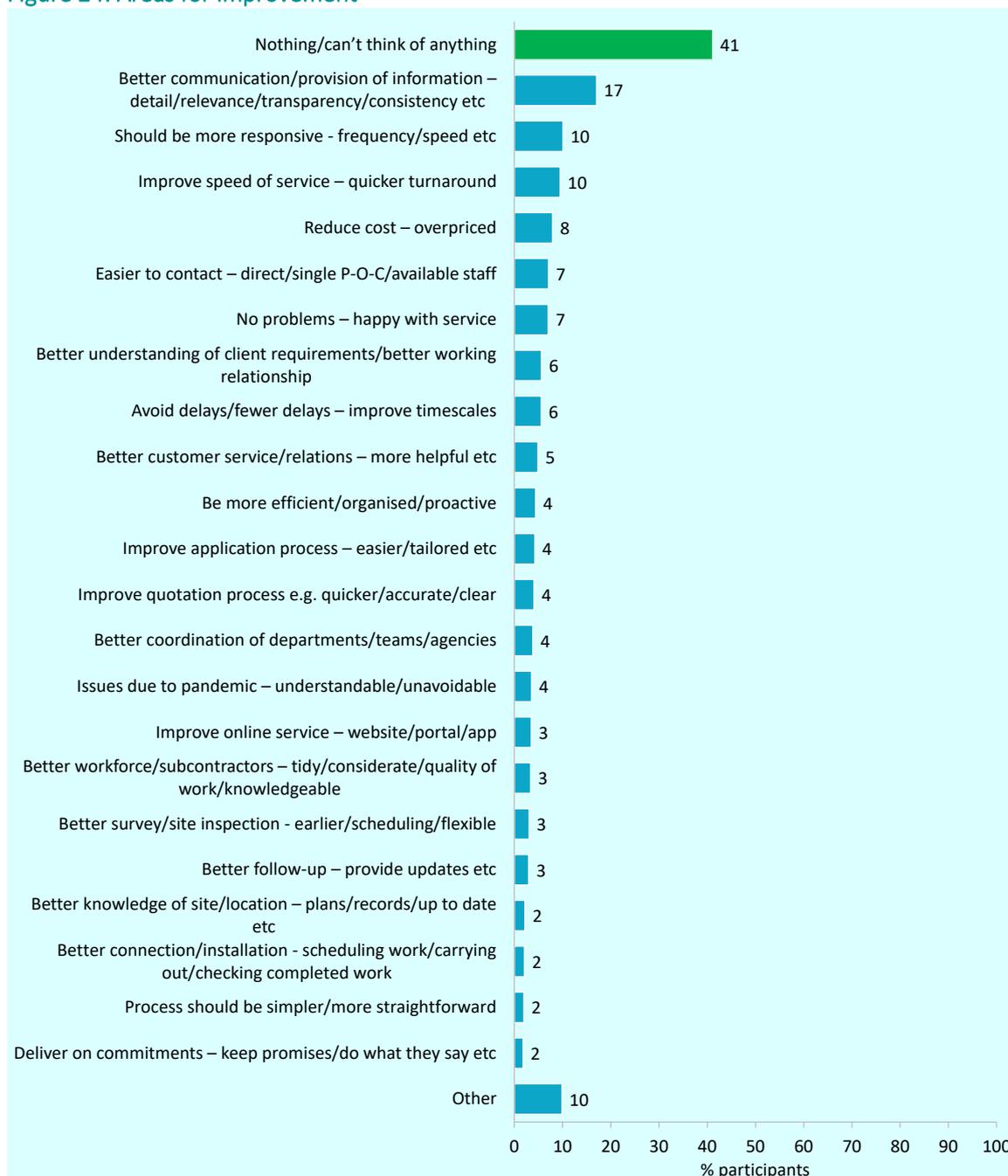
The open responses were coded to a thematic code frame (see Appendix D). Figure 24 shows all responses that account for 2% or more of coded responses.

Over four tenths (41%) said there were no areas of improvement.

The main area for improvement concerned better communication/provision of information which was mentioned by 17%. A tenth mentioned the following two improvements:

- Should be more responsive – frequency/speed etc
- Improve speed of service – quicker turnaround.

Figure 24: Areas for improvement



Base: 11,012

More than one response code could be assigned to each open response so percentages sum to more than 100%

4.3 Satisfaction with aspects of service

Participants were asked to consider the Developer Services team they used in relation to their transaction and to rate them on the following different aspects of service.

- Ease of contacting them
- The quality of the information available on their website

- Understanding your needs
- Timeliness of response to queries and requests
- Keeping you informed on progress, where required
- Offering value for money
- Completing the work within a timescale that is reasonable
- Meeting agreed deadlines
- Their efficiency in handling this stage of the work
- Accuracy and completeness of any documentation provided (eg quotations, plans, reports etc)
- Any advice and guidance they gave you, to help progress the work

The order of the aspects was randomised.

The question asked was:

“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.”

The scores were adjusted to a scale of 0-100.

Participants were most satisfied with the accuracy and completeness of documentation provided with an average score of 77.48, followed by understanding their needs (74.15) and meeting agreed deadlines (74.01).

The lowest satisfaction rating was for offering value for money (62.31). See Figure 25.

Figure 25: Satisfaction ratings with aspects of service



Weighted base: 11,012

Note: means exclude not applicable and don't know responses so the base for the mean varies for each service aspect

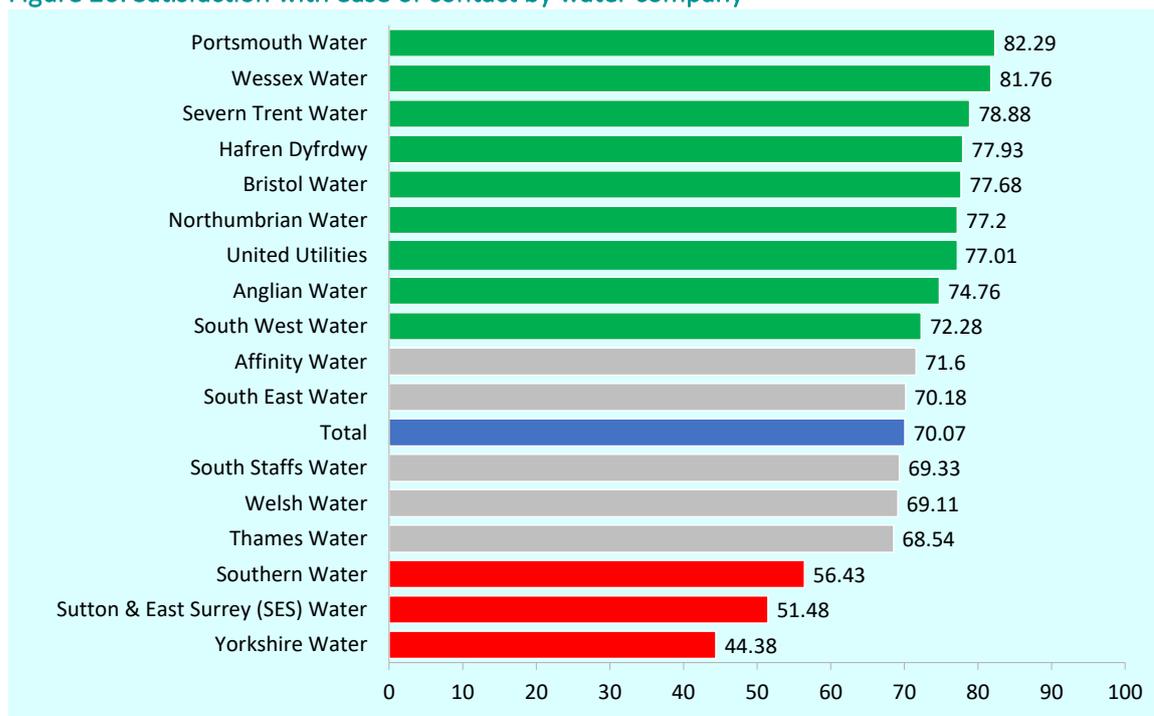
Details of water company performance on each of these aspects of service are shown in the following eleven sections.

Ease of contacting them

Customers of Portsmouth Water and Wessex Water developer services are most satisfied with respect to ease of contact with mean satisfaction ratings of 82.29 and 81.76 respectively. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 26.

Customers of Yorkshire Water (44.38), Sutton & East Surrey (SES) Water (51.48) and Southern Water (56.43) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 26.

Figure 26: Satisfaction with ease of contact by water company



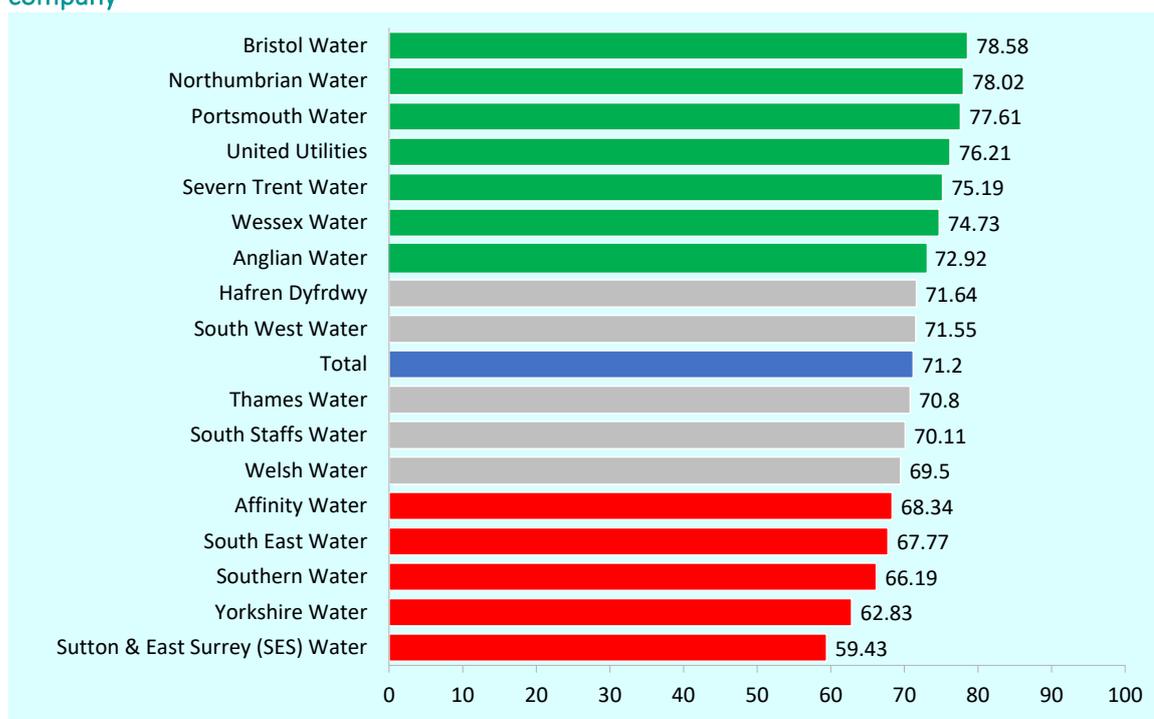
Base: Total 10,875, Yorkshire Water 938, Sutton & East Surrey (SES) Water 128, Southern Water 784, Thames Water 981, Welsh Water 906, South Staffs Water 268, South East Water 567, Affinity Water 708, South West Water 802, Anglian Water 962, United Utilities 947, Northumbrian Water 818, Bristol Water 311, Hafren Dyfrdwy 82, Severn Trent Water 961, Wessex Water 607, Portsmouth Water 105

The quality of the information available on their website

Customers of Bristol Water and Northumbrian Water developer services are most satisfied with the quality of the information available on their website with mean satisfaction ratings of 78.58 and 78.02 respectively. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 27.

Customers of Sutton & East Surrey (SES) Water (59.43) and Yorkshire Water (62.83) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 27.

Figure 27: Satisfaction with the quality of the information available on their website by water company



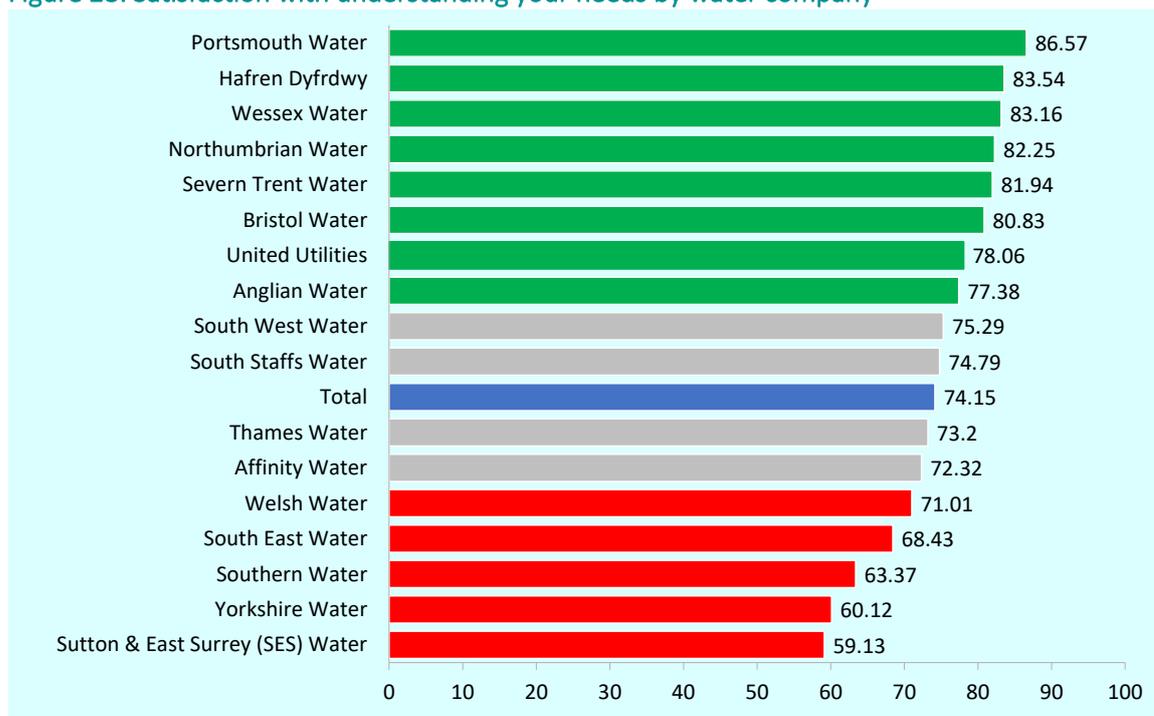
Base: Total 8,731, Sutton & East Surrey (SES) Water 106, Yorkshire Water 768, Southern Water 709, South East Water 426, Affinity Water 616, Welsh Water 725, South Staffs Water 188, Thames Water 855, South West Water 594, Hafren Dyfrdwy 61, Anglian Water 828, Wessex Water 478, Severn Trent Water 726, United Utilities 752, Portsmouth Water 67, Northumbrian Water 606, Bristol Water 226

Understanding your needs

Customers of Portsmouth Water (mean satisfaction score of 86.57), Hafren Dyfrdwy (83.54) and Wessex Water (83.16) developer services are most satisfied with understanding their needs. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 28.

Customers of Sutton & East Surrey (SES) Water (59.13) and Yorkshire Water (62.83) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 28.

Figure 28: Satisfaction with understanding your needs by water company



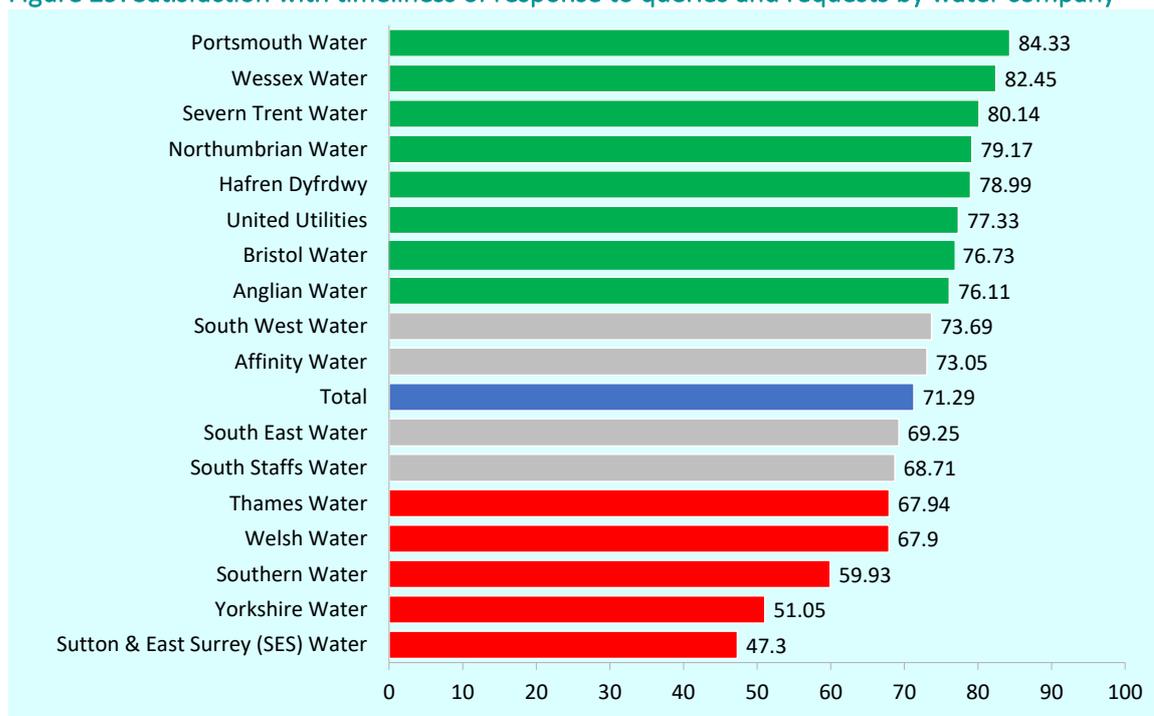
Base: Total 10,861, Sutton & East Surrey (SES) Water 126, Yorkshire Water 935, Southern Water 780, South East Water 568, Welsh Water 905, Affinity Water 703, Thames Water 982, Total 10,861, South Staffs Water 265, South West Water 800, Anglian Water 956, United Utilities 947, Bristol Water 314, Severn Trent Water 967, Northumbrian Water 819, Wessex Water 607, Hafren Dyfrdwy 82, Portsmouth Water 105

Timeliness of response to queries and requests

Customers of Portsmouth Water (mean satisfaction score of 84.33), Wessex Water (82.45) and Severn Trent Water (80.14) developer services are most satisfied with timeliness of response to queries and requests. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 29.

Customers of Sutton & East Surrey (SES) Water (47.3) and Yorkshire Water (51.05) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 29.

Figure 29: Satisfaction with timeliness of response to queries and requests by water company



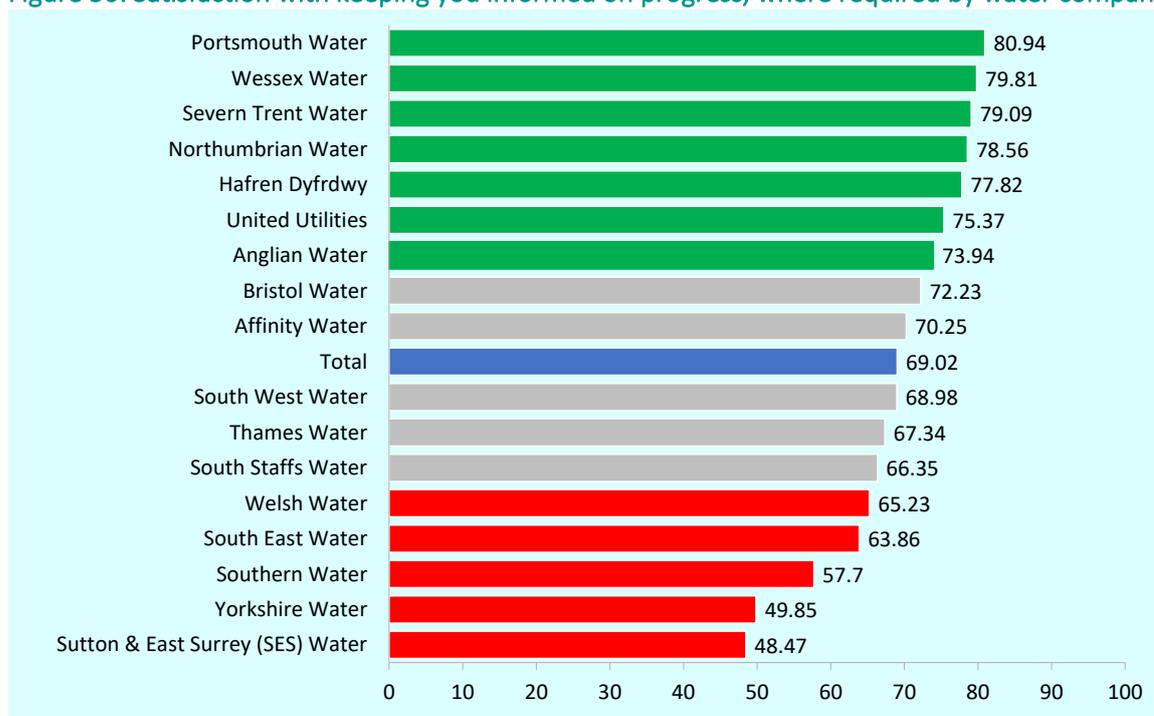
Base: Total 10,660, Sutton & East Surrey (SES) Water 126, Yorkshire Water 914, Southern Water 762, Welsh Water 892, Thames Water 964, South Staffs Water 263, South East Water 560, Affinity Water 694, South West Water 776, Anglian Water 942, Bristol Water 306, United Utilities 931, Hafren Dyfrdwy 79, Northumbrian Water 809, Severn Trent Water 945, Wessex Water 593, Portsmouth Water 104

Keeping you informed on progress, where required

Customers of Portsmouth Water (mean satisfaction score of 80.94), Wessex Water (79.81) and Severn Trent Water (79.09) developer services are most satisfied with keeping you informed on progress, where required. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 30.

Customers of Sutton & East Surrey (SES) Water (48.47) and Yorkshire Water (49.85) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 30.

Figure 30: Satisfaction with keeping you informed on progress, where required by water company



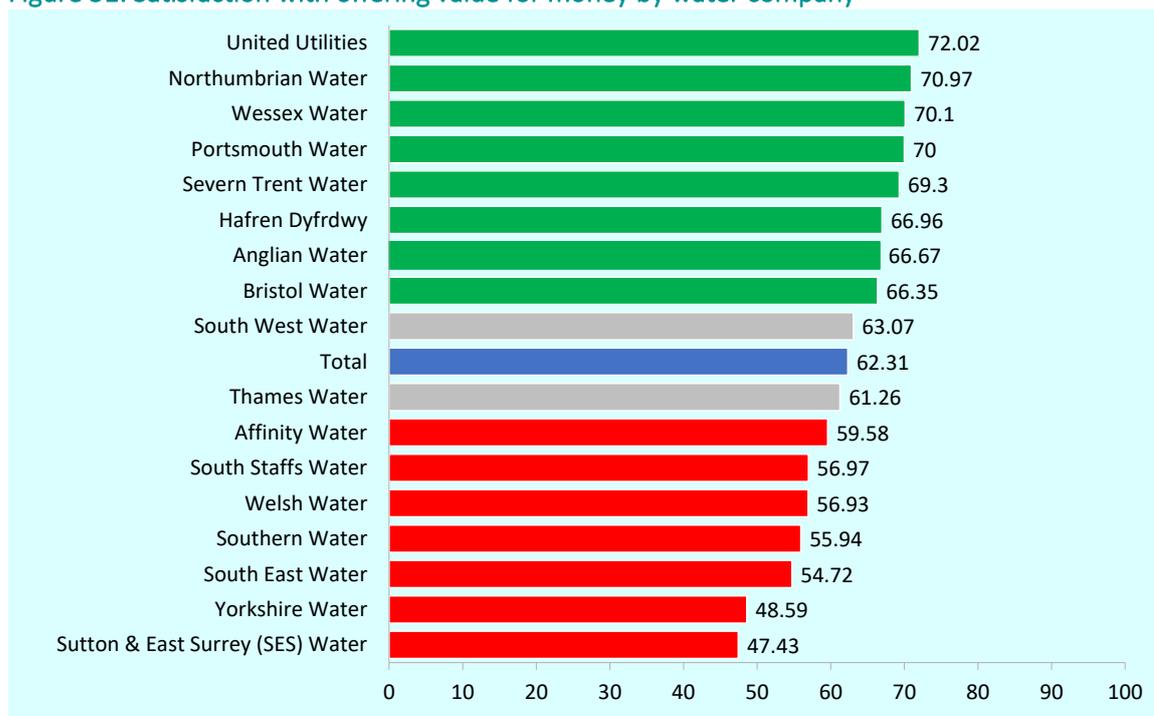
Base: Total 10,087, Sutton & East Surrey (SES) Water 124, Yorkshire Water 883, Southern Water 723, South East Water 503, Welsh Water 863, South Staffs Water 244, Thames Water 913, South West Water 713, Affinity Water 668, Bristol Water 292, Anglian Water 913, United Utilities 871, Hafren Dyfrdwy 78, Northumbrian Water 762, Severn Trent Water 911, Wessex Water 530, Portsmouth Water 96

Offering value for money

Customers of United Utilities (mean satisfaction score of 72.02), Northumbrian Water (70.97) and Wessex Water (70.10) developer services are most satisfied with offering value for money. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 31.

Customers of Sutton & East Surrey (SES) Water (47.43) and Yorkshire Water (48.59) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 31.

Figure 31: Satisfaction with offering value for money by water company



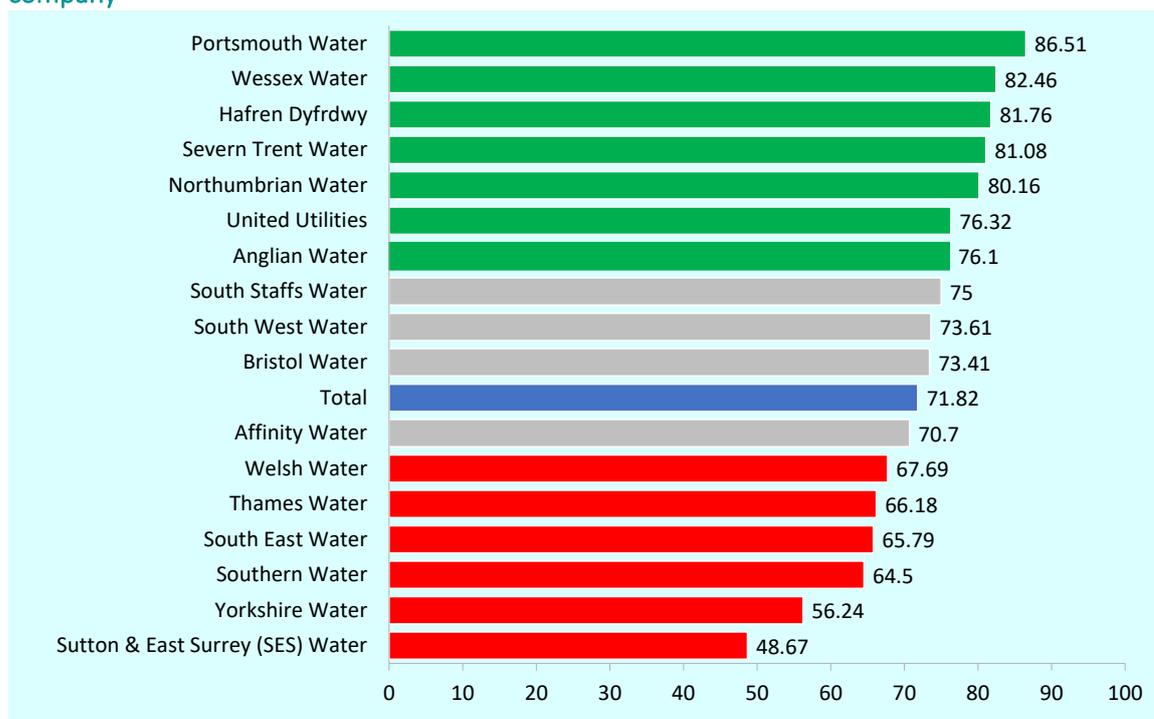
Base: Total 9,309, Sutton & East Surrey (SES) Water 113, Yorkshire Water 818, South East Water 509, Southern Water 697, Welsh Water 771, South Staffs Water 231, Affinity Water 602, Thames Water 870, South West Water 690, Bristol Water 274, Anglian Water 808, Hafren Dyfrdwy 69, Severn Trent Water 831, Portsmouth Water 92, Wessex Water 493, Northumbrian Water 640, United Utilities 801

Completing the work within a timescale that is reasonable

Customers of Portsmouth Water (mean satisfaction score of 86.51), Wessex Water (82.46) and Hafren Dyfrdwy (81.76) developer services are most satisfied with completing the work within a timescale that is reasonable. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 32.

Customers of Sutton & East Surrey (SES) Water (48.67) and Yorkshire Water (56.24) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 32.

Figure 32: Satisfaction with completing the work within a timescale that is reasonable by water company



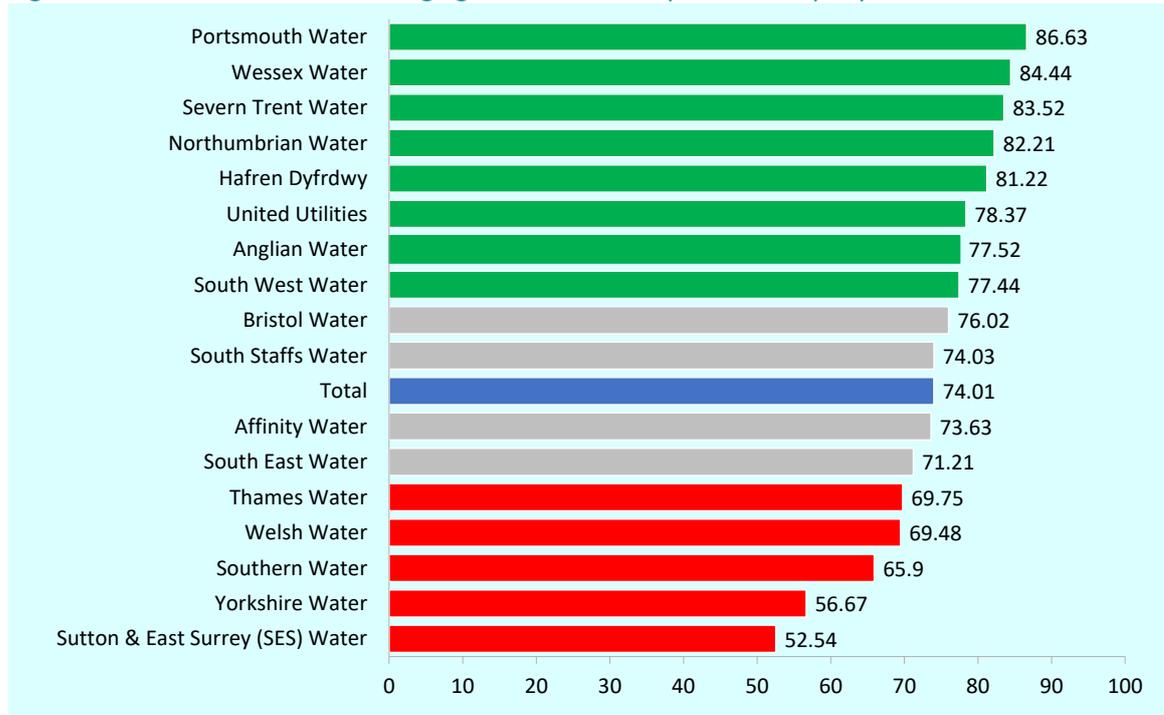
Base: Total 8,606, Sutton & East Surrey (SES) Water 98, Yorkshire Water 764, Southern Water 607, South East Water 390, Thames Water 794, Welsh Water 733, Affinity Water 502, Bristol Water 246, South West Water 609, South Staffs Water 208, Anglian Water 793, United Utilities 745, Northumbrian Water 703, Severn Trent Water 780, Hafren Dyfrdwy 68, Wessex Water 483, Portsmouth Water 83

Meeting agreed deadlines

Customers of Portsmouth Water (mean satisfaction score of 86.63), Wessex Water (84.44) and Severn Trent Water (83.52) developer services are most satisfied with meeting agreed deadlines. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 33.

Customers of Sutton & East Surrey (SES) Water (52.54) and Yorkshire Water (56.67) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 33.

Figure 33: Satisfaction with meeting agreed deadlines by water company



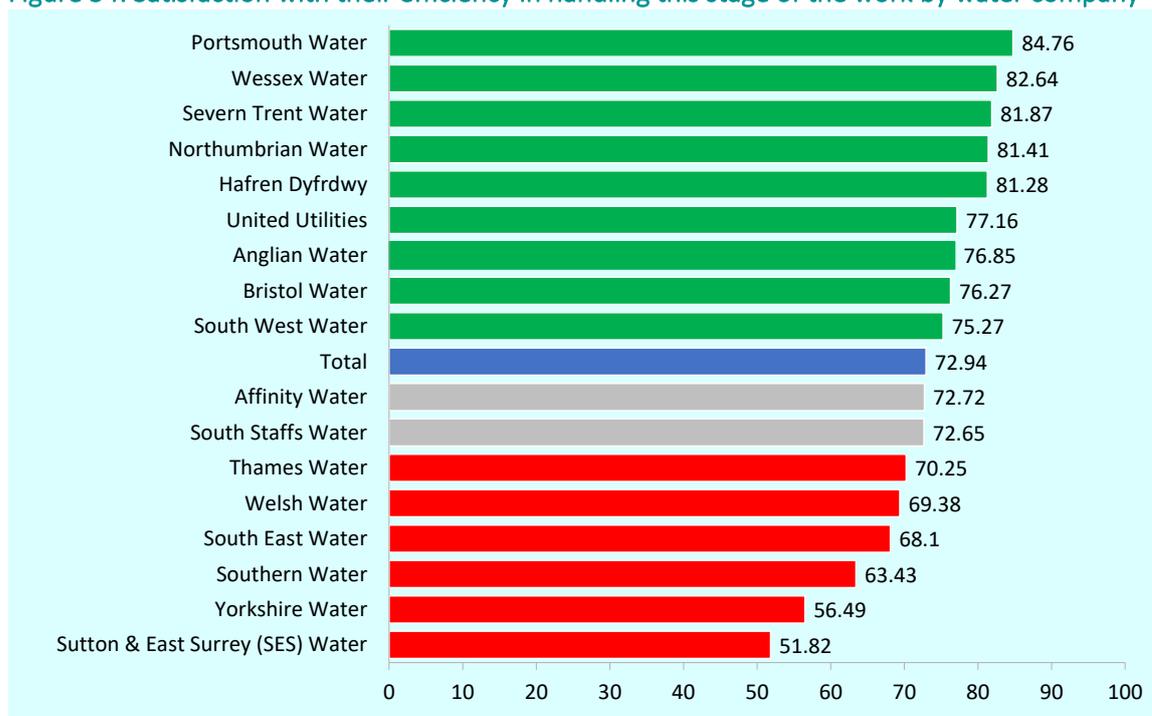
Base: Total 9,379, Sutton & East Surrey (SES) Water 114, Yorkshire Water 827, Southern Water 651, Welsh Water 788, Thames Water 834, South East Water 461, Affinity Water 590, South Staffs Water 233, Bristol Water 269, South West Water 688, Anglian Water 825, United Utilities 821, Hafren Dyfrdwy 74, Northumbrian Water 732, Severn Trent Water 858, Wessex Water 513, Portsmouth Water 101

Efficiency in handling this stage of the work

Customers of Portsmouth Water (mean satisfaction score of 84.76), Wessex Water (82.64) and Severn Trent Water (81.87) developer services are most satisfied with their efficiency in handling this stage of the work. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 34.

Customers of Sutton & East Surrey (SES) Water (51.82) and Yorkshire Water (56.49) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 34.

Figure 34: Satisfaction with their efficiency in handling this stage of the work by water company



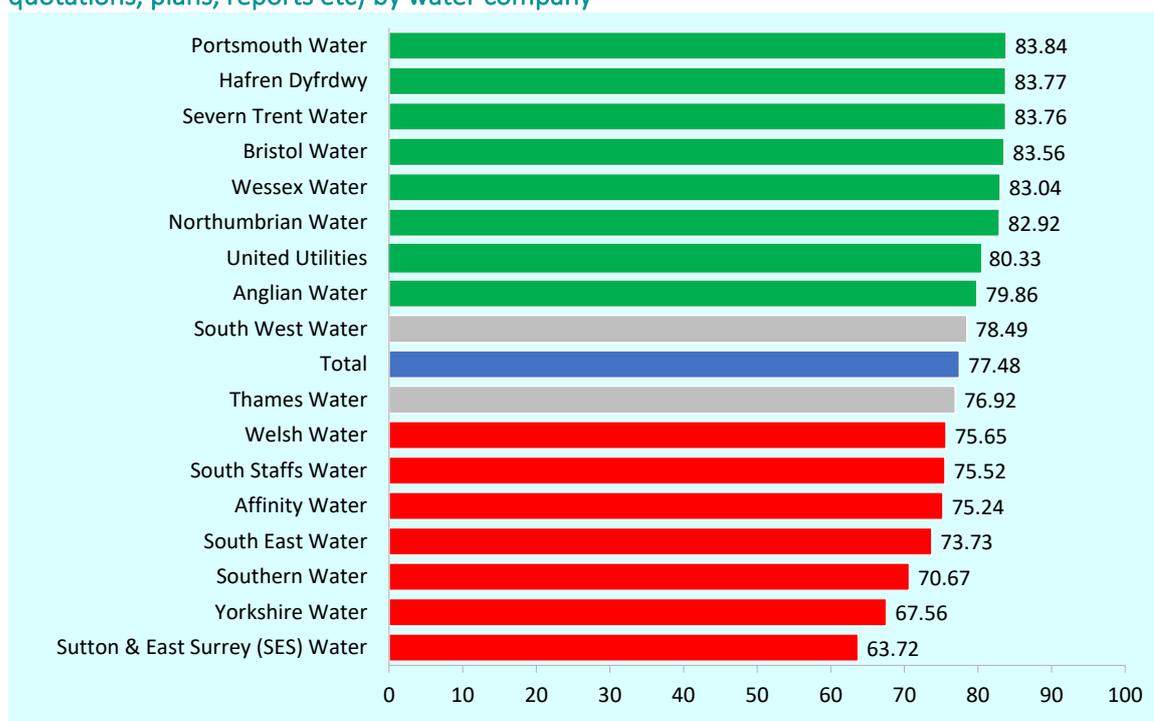
Base: Total 10,408, Sutton & East Surrey (SES) Water 121, Yorkshire Water 897, Southern Water 743, South East Water 527, Welsh Water 873, Thames Water 937, South Staffs Water 257, Affinity Water 668, South West Water 754, Bristol Water 295, Anglian Water 929, United Utilities 913, Hafren Dyfrdwy 78, Northumbrian Water 796, Severn Trent Water 937, Wessex Water 580, Portsmouth Water 103

Accuracy and completeness of any documentation provided

Customers of Portsmouth Water (mean satisfaction score of 83.84), Hafren Dyfrdwy (83.77) and Severn Trent Water (83.76) developer services are most satisfied with accuracy and completeness of any documentation provided (eg quotations, plans, reports etc). Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 35.

Customers of Sutton & East Surrey (SES) Water (63.72) and Yorkshire Water (67.56) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 35.

Figure 35: Satisfaction with accuracy and completeness of any documentation provided (eg quotations, plans, reports etc) by water company



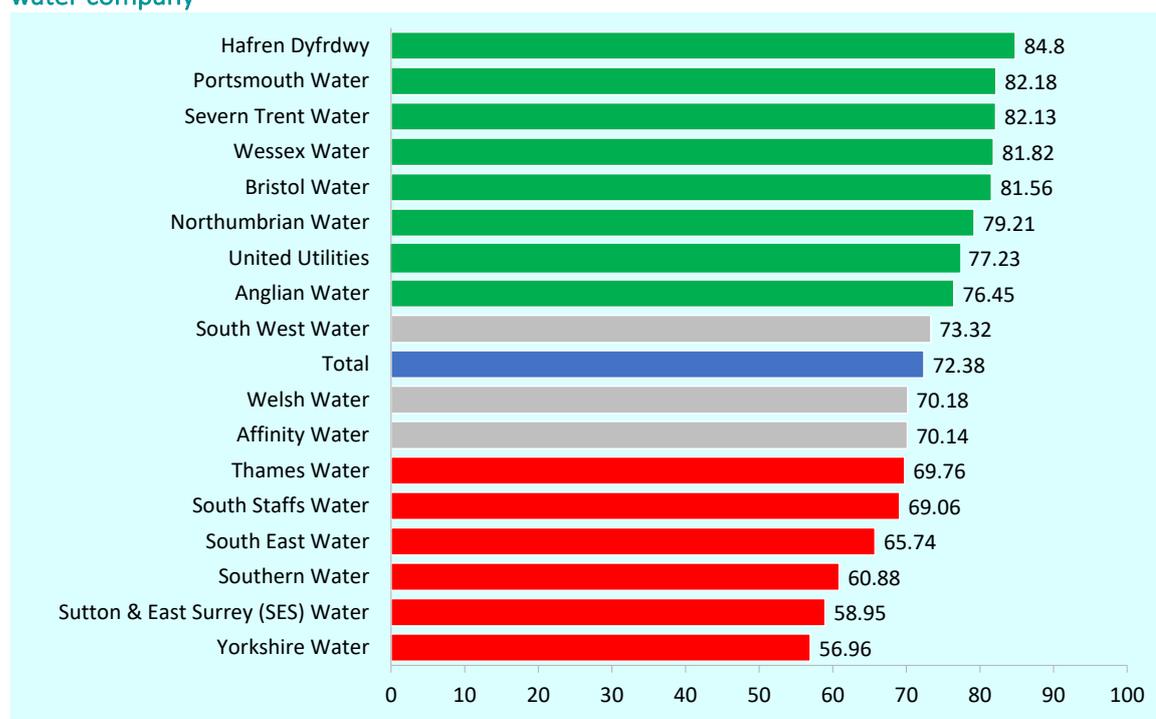
Base: Total 10,256, Sutton & East Surrey (SES) Water 121, Yorkshire Water 877, Southern Water 732, South East Water 542, Affinity Water 681, South Staffs Water 250, Welsh Water 851, Thames Water 936, South West Water 747, Anglian Water 886, United Utilities 907, Northumbrian Water 774, Wessex Water 565, Bristol Water 295, Severn Trent Water 916, Hafren Dyfrdwy 77, Portsmouth Water 99

Any advice and guidance given, to help progress the work

Customers of Hafren Dyfrdwy (mean satisfaction score of 84.80), Portsmouth Water (82.18) and Severn Trent Water (82.13) developer services are most satisfied with any advice and guidance they gave you, to help progress the work. Their satisfaction ratings are significantly higher than the industry total along with all the other water companies shown with green bars in Figure 36.

Customers of Yorkshire Water (59.96) and Sutton & East Surrey (SES) Water (58.95) are least satisfied. Their satisfaction ratings are significantly lower than the industry total along with all the other water companies shown with red bars in Figure 36.

Figure 36: Satisfaction with any advice and guidance they gave you, to help progress the work by water company



Base: Total 9,670, Yorkshire Water 815, Sutton & East Surrey (SES) Water 114, Southern Water 680, South East Water 479, South Staffs Water 234, Thames Water 872, Affinity Water 642, Welsh Water 820, South West Water 710, Anglian Water 854, United Utilities 848, Northumbrian Water 734, Bristol Water 289, Wessex Water 538, Severn Trent Water 865, Portsmouth Water 101, Hafren Dyfrdwy 75

As can be seen above, there is great consistency in the satisfaction scores across the eleven aspects. For example, Portsmouth Water is first for eight of the aspects and Sutton & East Surrey (SES) Water and Yorkshire Water are the last two for all aspects. Table 13 below shows the ranking for each aspect.

Table 13: Rank order of each aspect by water company

	Sutton & East Surrey (SES)	Yorkshire Water	Southern Water	South East Water	Welsh Water	Thames Water	South Staffs Water	Affinity Water	South West Water	Anglian Water	Bristol Water	United Utilities	Northumbrian Water	Hafren Dyfrdwy	Severn Trent Water	Wessex Water	Portsmouth Water
Ease of contacting them	16	17	15	11	13	14	12	10	9	8	5	7	6	4	3	2	1
The quality of the information available on their website	17	16	15	14	12	10	11	13	9	7	1	4	2	8	5	6	3
Understanding your needs	17	16	15	14	13	11	10	12	9	8	6	7	4	2	5	3	1
Timeliness of response to queries and requests	17	16	15	11	14	13	12	10	9	8	7	6	4	5	3	2	1
Keeping you informed on progress, where required	17	16	15	14	13	11	12	9	10	7	8	6	4	5	3	2	1
Offering value for money	17	16	14	15	13	10	12	11	9	7	8	1	2	6	5	3	4
Completing the work within a timescale that is reasonable	17	16	15	14	12	13	8	11	9	7	10	6	5	3	4	2	1
Meeting agreed deadlines	17	16	15	12	14	13	10	11	8	7	9	6	4	5	3	2	1
Their efficiency in handling this stage of the work	17	16	15	14	13	12	11	10	9	7	8	6	4	5	3	2	1
Accuracy and completeness of any documentation provided	17	16	15	14	11	10	12	13	9	8	4	7	6	2	3	5	1
Any advice and guidance they gave you, to help progress the work	16	17	15	14	10	12	13	11	9	8	5	7	6	1	3	4	2

4.4 Qualitative D-MeX Customer Satisfaction (CSAT) results

After considering the eleven different aspects of service provision the developer services team provide, participants were asked to rate their overall satisfaction with how the water company handled their transaction. The question asked was:

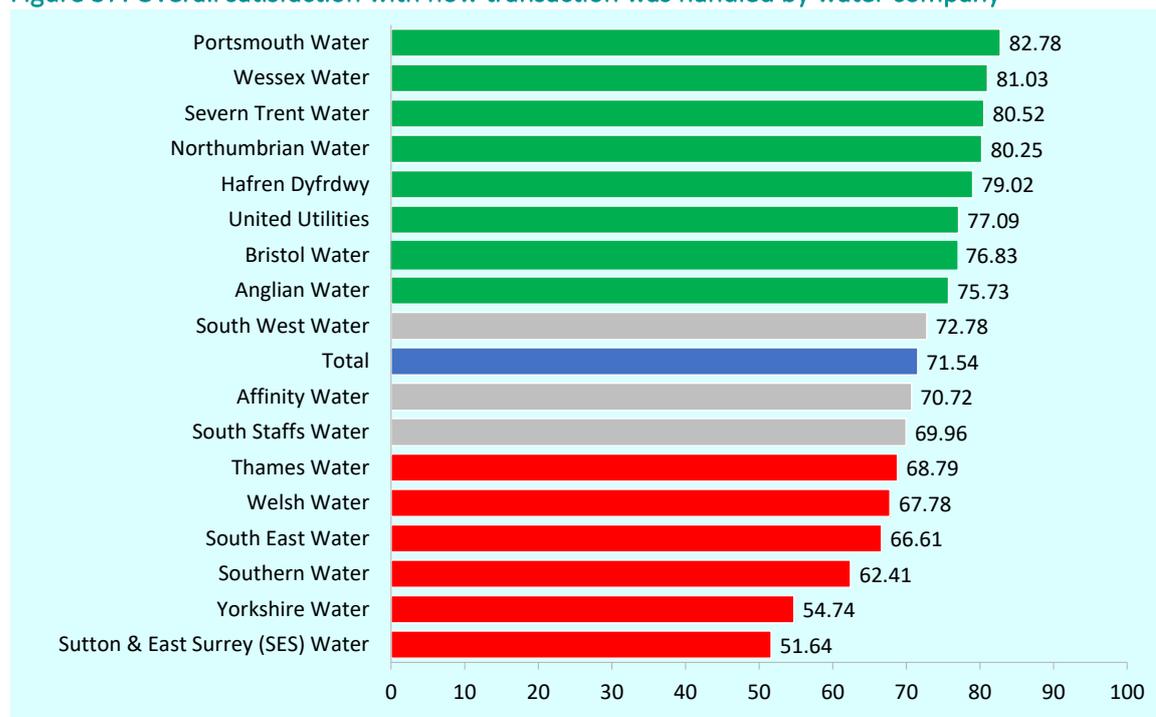
“How satisfied are you overall with how [Water Company] handled this particular transaction using the same scale where 0 is extremely dissatisfied and 10 is extremely satisfied?”

The scores were adjusted to a scale of 0-100. The industry average for overall satisfaction is 71.54. Figure 37 shows the mean satisfaction score overall. Water companies which have mean scores significantly higher than the industry total are shown with green bars and water companies which have mean scores significantly lower than the industry total are shown with red bars.

Portsmouth Water (mean satisfaction score of 82.78) and Wessex Water (81.03) are the two highest ranked companies.

Sutton & East Surrey (SES) Water (51.64) and Yorkshire Water (54.74) are the two lowest ranked companies.

Figure 37: Overall satisfaction with how transaction was handled by water company



Base: Total 10,960, Sutton & East Surrey (SES) Water 128, Yorkshire Water 947, Southern Water 785, South East Water 572, Welsh Water 911, Thames Water 988, South Staffs Water 269, Affinity Water 708, South West Water 805, Anglian Water 971, Bristol Water 319, United Utilities 954, Hafren Dyfrdwy 82, Northumbrian Water 825, Severn Trent Water 977, Wessex Water 611, Portsmouth Water 108

4.5 Most important aspects of service to customers

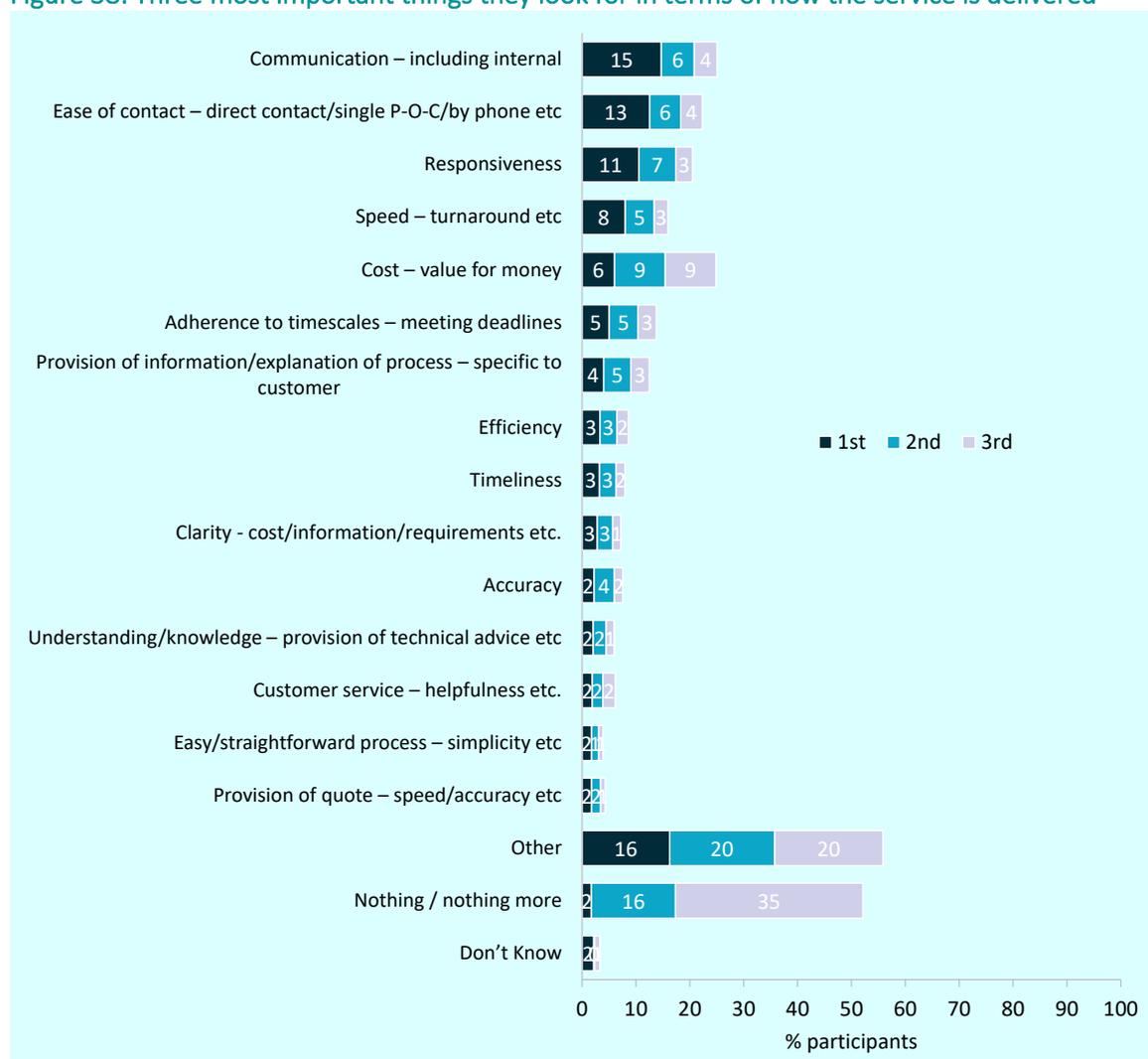
All participants were asked to think more generally about dealing with the water company's Developer Services team and to say what they would personally say are the three most important things they look for in terms of how the service is delivered.

The open responses were coded to a thematic code frame (see Appendix D). Figure 38 shows all responses that account for 2% or more of coded responses for the most important aspect.

Overall, 15% mentioned ‘communication – including internal’ as the most important aspect (with another 10% placing it 2nd or 3rd). Ease of contact was most important for 13% with another 10% placing it 2nd or 3rd). Responsiveness was most important for 11% with another 10% placing it 2nd or 3rd).

Cost – value for money was mentioned by 6% as the most important aspect but another 18% said it was 2nd or 3rd most important.

Figure 38: Three most important things they look for in terms of how the service is delivered



Base: 11,012

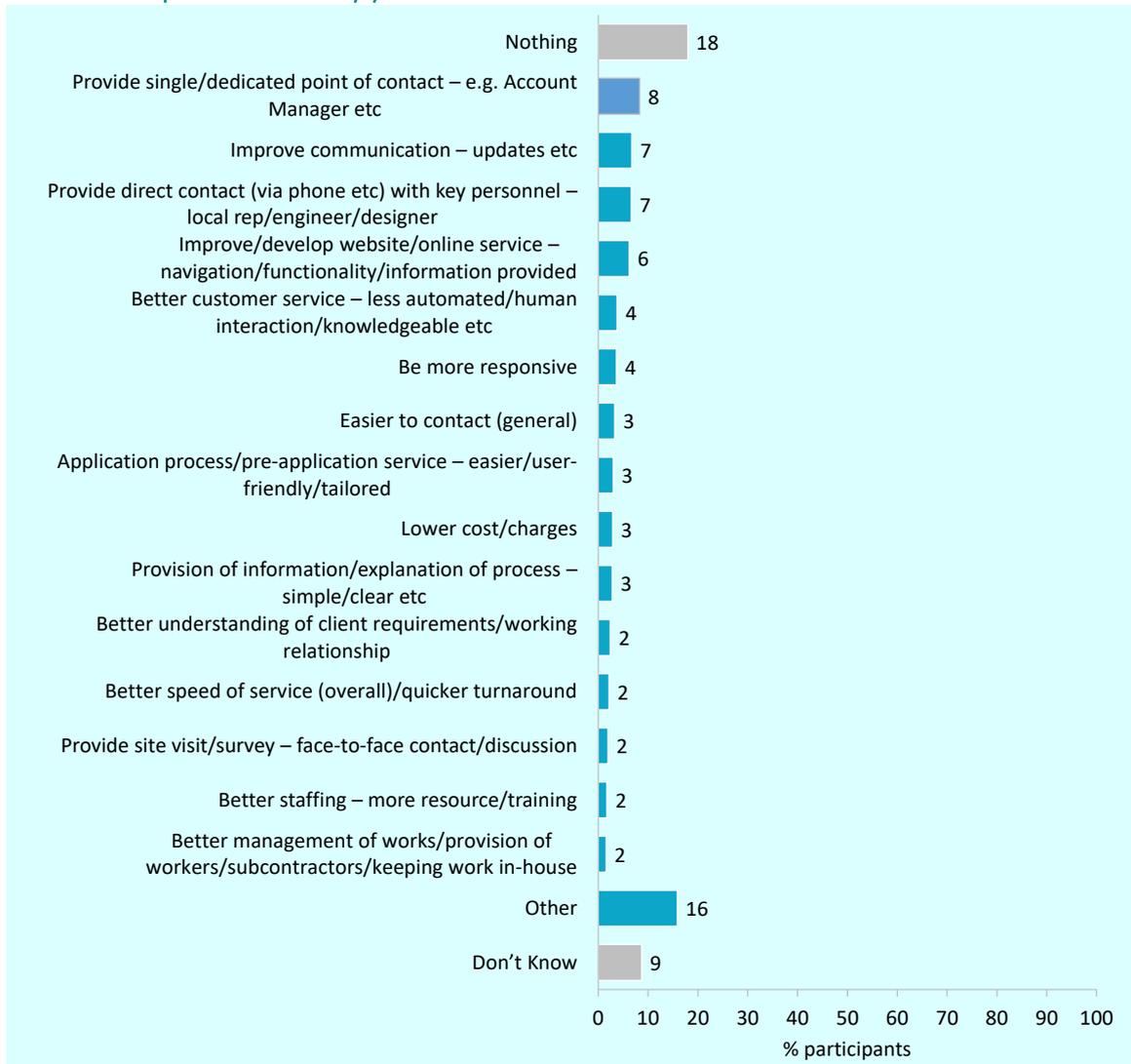
Participants were then asked:

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

Nearly a fifth (18%) said there was nothing and 9% did not know. The main things mentioned were

- Provide single/dedicated point of contact – e.g. Account Manager etc (8%)
- Improve communication – updates etc (7%)
- Provide direct contact (via phone etc) with key personnel – local rep/engineer/designer (7%).

Figure 39: One thing that the Developer Services team at [Water Company] could do that would have most impact on how easy you find them to deal with



Base: 11,012

5 Recommendations

Introduction

Overall, the surveys ran well with no major issues. This chapter discusses our recommendations for potential efficiencies and improvements.

C-MeX CSS Sample format

As observed in Section 2.2, the sample format defined in the Ofwat guidance for supply of records to Accent, was not initially adopted by the water companies and in the name of getting things up and running promptly year 1 was run with the shadow year template.

A number of sample fields were removed between the shadow year and year one, following Ofwat's Guidance. Despite water companies maintaining the file format from the shadow year, some left these fields blank. From a practical perspective this process worked well for all involved.

Recommendation: that the guidance be reviewed to require sample being submitted in the current (shadow year) format, but with a note to signify non-compulsory fields:

Table 14: Proposed sample format

Column	Field name	Status
A	Parent water company	Compulsory
B	Water company brand	Compulsory
C	AccountNumber	Compulsory
D	Name	Compulsory
E	Telephone Number	Compulsory for non-digital contacts only
F	Address	Voluntary
G	Postcode	Compulsory
H	Email Address	Compulsory for digital contacts only
I	High Level Reason for Contact (Billing/Clean/ Waste)	Compulsory
J	Mode of Contact	Compulsory
K	Date of Contact (dd/mm/yyyy)	Compulsory
L	Lower Level Reason for Contact	Compulsory
M	Date of Resolution (dd/mm/yyyy)	Voluntary
N	Do Not Contact Flag	Voluntary
O	Complaint	Voluntary
P	PropertyRef	Voluntary
Q	CustomerReference	Voluntary

Note. Columns A-Q (including designated field names), must be present. 'Status' indicates whether the record containing a value is compulsory or not.

Contact types for C-MeX CSS (and their designation as digital vs. non)

At the outset of the year, it was recognised that “WhatsApp” featured as a contact channel for a number of water companies. It was not immediately clear whether this should be treated as a digital or a non-digital contact type. It was decided by Ofwat that “WhatsApp” should be treated as a non-digital contact type, due to the fact that water companies have phone numbers rather than email addresses for these participants.

In addition, over the course of the year a number of companies adopted “Apple Chat”, which was designated as a digital contact type.

Recommendation: consider whether or not it is appropriate to document this in the Ofwat guidance.

C-MeX CSS Check and challenge (“reason for contact”)

Despite the guidance stating that “being incorrectly allocated to a particular ‘Reason for contact’” is legitimate grounds for a challenge, Ofwat’s instruction to Accent was to (a) allow participants to reclassify their reason for contact (billing vs. water vs. waste) and complete an interview, and (b) to leave the record classified as it was on the initial sample regardless of that.

The frequency of this occurring is perhaps raised by participants classifying their reason for contact as being a “general query” (which is classified along with billing and account related queries at the relevant question in the script) even when it is predominantly a water or waste related query.

Recommendation: consider reviewing the Ofwat guidance so it’s clear that participants reallocating from one reason for contact to another, is not valid grounds for challenge.

Recommendation: consider whether answer code 1 at Q5 needs review or not.

C-MeX CSS detailed component rankings

Ofwat have instructed that from year 2, quarter 1, the detailed ranking comparison (which shows ranks for the individual components making up the C-MeX CSS score) should go to water companies.

Recommendation: Consider adding this requirement to the Ofwat guidance.

DNC provision to water companies (C-MeX CSS and D-MeX)

Accent holds and runs a live, real time, DNC list for these activities. All samples provided are deduped against them. Therefore it is not necessary for water companies to remove them. If the water companies are to hold an Ofwat DNC list for other purposes (such as other research Ofwat may conduct) there is still value in the agent passing DNCs back to the water company quarterly.

Recommendation: that the Ofwat guidance be changed to remove the requirement for water companies to maintain an up-to-date record of Ofwat DNCs and to exclude them from the customer information being provided to the Agent, and for responsibility around maintaining a database of Ofwat DNCs and suppressing against it to rest entirely with the Agent, as far as these surveys go.

D-MeX sample provision deadline

The deadline for provision of D-MeX sample to the agent (currently specified to be “the 10th of the following month”) has been refined at Ofwat’s instruction to allow an additional working days where the 10th falls on a weekend.

Recommendation: Clarify Ofwat’s guidance to reflect that if the 10th falls on a Saturday (and so one working day is lost), the deadline is the end of the following working day. Where the 10th falls on a Sunday or bank holiday, the deadline is the end of the second following working day.

Pre-coding open ended questions

There are a number of open questions for which the responses have been coded using code frames. These code frames have been developed based on the nature of responses given with each unique response being given a separate code. The result is a rich and detailed qualitative analysis of the questions. However, many of the codes feature so rarely (eg less than 2% of responses) that they are not reported on.

If the resolution of this data is getting in the way of its usefulness, it is possible to group the codes into much broader categories of responses.

With the code frames to these questions grouped (and therefore dramatically shortened), it would be possible to reduce both the cost and time overheads associated with the coding process, by introducing these pre-codes in to the CATI questionnaire (either unprompted, or prompted, as preferred) and having the interviewers code directly into it.

The main disadvantage is that it would remove the detailed responses within those codes, and that it would lengthen the CATI survey if the verdict was to read out the pre-codes.

We do observe that the way in which CATI participants (who only get asked the pure open ended reason for call, after the initial billing/water/waste grouping) are treated does already differ from online participants (who are already presented with pre-coded lists – see Q7/8/9).

Recommendation: Consider the matter and instruct if relevant

Appendix A

CSS Questionnaire



SYSTEM INFORMATION:

Interviewer number:

Interviewer name:

Date:

Time interview started:

C-MeX CSS

CATI Good morning/afternoon/evening. My name is and I am calling from Accent on behalf of Ofwat, the economic regulator for the water sector in England and Wales. Could I talk to #ID#?

WHEN TALKING TO RIGHT PERSON: Ofwat would like your help in understanding how water and sewerage companies deal with their customers. I understand that you have been in contact with **#WATERBRAND#**, and we would like to ask you a few questions about the service you received.

IF NO NAME ON SAMPLE SAY. I understand that someone on this number has been in touch with **#WATERBRAND#**. Could I talk to the person who was in contact with **#WATERBRAND#**?

IF TALKING TO CORRECT PERSON, CONTINUE. OTHERWISE ASK TO BE TRANSFERRED OR MAKE APPOINTMENT TO CALL BACK

WHEN TALKING TO RIGHT PERSON: Ofwat would like your help in understanding how water and sewerage companies deal with their customers and we would like to ask you a few questions about the service you received.

ALL: This information will be used to help Ofwat understand how **#WATERBRAND#** is performing.

The survey will take around 5 minutes to complete.

Your responses will be treated in the strictest confidence. Accent abides by data protection laws at all times.

You can find out more information about Ofwat's surveys and what is done with the information that is collected in the Privacy Policy on Ofwat's website <https://www.ofwat.gov.uk/publication/privacy-policy>

INTERVIEWER TO DETERMINE IF PARTICIPANT WANTS WEBSITE ADDRESS BEFORE PROVIDING IT OR IF IT IS TO BE SENT VIA EMAIL. IF SO, SAY

In that case, please can I take your email address and I'll send you a link to the policy.

TYPE IN EMAIL ADDRESS, CAREFULLY CHECKING SPELLING AND READ BACK TO PARTICIPANT

ONCE PRESSED 'SEND', ASK PARTICIPANT TO CHECK WHETHER THEY HAVE RECEIVED EMAIL.
IF NOT, CHECK AND RE-SEND

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

IF NECESSARY:

- You have been selected at random from customers contacting [Water Company Name].

- Ofwat's privacy policy can be accessed using this link: www.ofwat.gov.uk/privacy-policy

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

Yes

No **THANK & CLOSE**

INTCHECK. INTERVIEWER: PLEASE CONFIRM YOU HAVE ADVISED THE PARTICIPANT OF:

Calls being recorded

INTCHECK2. INTERVIEWER: PLEASE CONFIRM YOU HAVE ASKED AND CHECKED THAT THE PARTICIPANT IS **NOT** TAKING THE INTERVIEW ON A MOBILE DEVICE WHILE DRIVING OR OPERATING EQUIPMENT

Yes, it is safe for the participant to proceed

No, it isn't safe – we need to call back later **GO TO APPT SCREEN**

ONLINE: Thank you in advance for your participation. Accent is conducting a survey on behalf of Ofwat, the economic regulator for 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. Accent abides by data protection laws at all times.

You can find out more information about Ofwat's surveys and what is done with the information collected in Ofwat's Privacy Policy which is here: <https://www.ofwat.gov.uk/publication/privacy-policy>

Click here to begin the survey.

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

Scoping questions

Q1. **CATI:** Firstly, can I confirm that you were the person who was in contact with **[Water Company]** on **[insert date]**? **INTERVIEWER: PROMPT PARTICIPANT WITH DETAILS OF CONTACT IF NECESSARY [CONTACT TYPE]**

Yes **GO TO** Error! Reference source not found.

No **GO TO Q2**

Q1. **ONLINE:** According to our records, on **[DATE]** you dealt with **[Water Company]**. Please confirm that it was you personally who interacted with your water company, as mentioned above.

Yes **GO TO Q3**

No **THANK & CLOSE**

Q2. **CATI:** Can I speak to the person who was in contact with **[Water Company]** please?

Yes

No, they are unavailable **MAKE APPOINTMENT OR THANK & CLOSE**

No one has contacted the company **THANK & CLOSE**
 Refused **THANK & CLOSE**

Q3. **CATI:** Could I just check, was this contact in regard to [Water Company] supplying you as a domestic customer?

ONLINE: Was this matter in regard to [Water Company] supplying you as a domestic customer?

Yes

No **THANK & CLOSE**

Q4. **CATI AND ONLINE. IF NO REASON FOR CONTACT AVAILABLE ON SAMPLE, GO TO Q5. ASK OTHERS:** Can I confirm that you contacted [Water Company] about [CONTACT TYPE]?

Yes **CATI GO TO Q10. ONLINE GO TO Q6**

No

Q5. **IF NO AT Q4 OR NO REASON ON SAMPLE ASK:** What was the main reason for making contact with [Water Company] on that occasion? Was it **READ OUT (IF NECESSARY: Please pick the closest that applies)**

Anything to do with billing, your account or a general query

Anything to do with your supply of water

Anything to do with your sewerage service

INTERVIEW ON REASON GIVEN AT THIS QUESTION

ENSURE PARTICIPANT IS THINKING ABOUT WATER COMPANY INDICATED IN SAMPLE. IF PARTICIPANT CONFUSED AT ALL ABOUT WHICH ORGANISATION THEY CONTACTED, THANK & CLOSE

CATI GO TO Q10. ONLINE GO TO Q6

Main Questionnaire

Q6. **ONLINE** Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 5 minutes to complete.

IF BILLING AT Q4 OR Q5 GO TO Q7

IF WATER AT Q4 OR Q5 GO TO Q8

IF WASTEWATER AT Q4 OR Q5 GO TO 0

Q7. **ONLINE BILLING/ACCOUNT RELATED QUERIES.**

Please pick the closest detailed issue that applies.

Amend personal details on account

A query about a bill

A query about a payment

Due to a recent move, or planning to move

Direct debit set up

Payment plan set up

Direct debit query

To make a payment

To advise that I'm unable to pay

To apply for/to get a water meter

To give/request a water meter reading

To report a problem with my meter/meter query

To request a refund

To notify of a customer having died

To query a reminder or debt collection activity
 The bill seemed too high
 Payment card query
 Asking for a reduction/discount in bill
 Online account problem/setting up
 To make a query or complaint about the website
 To make a query or complaint about a customer service issue
 Other (Please specify).....

GO TO Q10

Q8. WATER RELATED QUERIES

Please pick the closest detailed issue that applies.

About a faulty meter
 About a meter installation
 About finding the location of water equipment (incl. pipes/meter/stopcock)
 About the taste or smell of the tap water (quality)
 About the colour of the tap water
 Because the tap water is/was making me feel ill
 Because of a water leak/burst on the road
 Because of a water leak/burst on my property
 Regarding low pressure of tap water
 No supply/water gone off
 Asking for water supply to be turned on or off
 About flooding with clean/drinking water
 About a leak on my meter
 About a connection to the water supply network
 About the Lead and Common Supply Pipe Scheme
 About defective/dangerous water equipment ie stop taps, manhole covers, hydrants, raised/sunken chambers
 High pressure from my tap
 About the hardness of the water
 Other (Please specify).....

GO TO Q10

Q9. ONLINE WASTEWATER (SEWERAGE) RELATED QUERIES.

Please pick the closest detailed issue that applies.

About a blockage in the sewer/drains
 About faulty wastewater equipment or sewer pipes
 About flooding with sewerage or foul water
 About smells from sewers and sewage treatment works
 About finding the location of sewers, drains etc
 About a connection to the sewer, wastewater network
 Empty septic tank
 Private sewer query
 Regarding a poor reinstatement
 Toilet query
 Other (Please specify).....

Q10. CATI: Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 5 minutes to complete.

ALL: Could you confirm how you had contact with [Water Company] on this occasion on [insert date]?
SINGLE CODE ONLY

- I telephoned them
- I wrote them a letter
- I emailed them
- I contacted them through a form on their website
- I contacted them through 'live chat' on their website
- I contacted them by text
- I contacted them through social media (eg Twitter/Facebook/Instagram)
- I contacted them through an app
- I visited the water company in person
- I completed a transaction through my online account with the water company
- Other (Please specify) _____

Q11. Is the matter you wanted to be dealt with now fully resolved?

- Yes
- No

Q12. Taking everything into account how satisfied are you with your recent experience with [Water Company]? Please use a scale of 0-10, where 0 = extremely dissatisfied, 5 = neither satisfied nor dissatisfied and 10 = extremely satisfied.

INSERT SCORE _____

Q13. **IF Q12=9 OR 10 ASK (OTHERS GO TO Q7):** What did they do well?

.....

GO TO Q9

Q14. **IF Q12=7 OR 8 ASK (OTHERS GO TO Q8):** What could they have done to improve this score?

.....

GO TO Q9

Q15. **IF Q12=0 TO 6 ASK (OTHERS GO TO Q9):** What could they have done better?

.....

Q16. 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.

INSERT SCORE _____

Q17. **CATI:** Whilst this survey is being carried out on behalf of Ofwat, we can share your feedback, including your name, contact details, and survey responses, and a recording of this phone call, with [Water Company] for it to improve its customer service and to make sure that we have accurately recorded your survey feedback. Please let us know if you object to us sharing your feedback for this purpose. If you would like more information about how [Water Company] processes your personal data, please refer to its privacy policy.

ONLINE: Whilst this survey is being carried out on behalf of Ofwat, [Water Company] may use your answers to improve its customer service. With this in mind do you object to us sharing your

feedback with [Water Company]? If you would like more information about how [Water Company] processes your personal data, please refer to its privacy policy.

No, do not object **ONLINE GO TO THANK YOU. CATI GO TO** Error! Reference source not found.

ONLINE: Yes, object to identifiable survey responses **GO TO 0**

CATI: Yes, object to identifiable survey responses & recording **GO TO 0**

CATI: Yes, object to call recording **GO TO 0**

Q18. **CATI:** In some cases, [Water Company] may contact you to discuss any issues included in your feedback to improve its customer service. Do you object to being contacted by [Water Company] for this purpose?

Object

Do not object

Q19. **IF Q17 = 2 OR 3 SAY:** In that case your responses will only be passed on to [Water Company] in anonymised form and will not be linked to you personally.

IF Q17 = 4 SAY: In that case your name, contact details, and responses will be passed on to [Water Company], but we will not pass on a recording of this call.

ALL CATI: Please can I take a note of your name and where we can contact you for quality control purposes?

Name: [CATI: DP, IMPORT FROM ID]

Telephone: [CATI: DP, IMPORT FROM TELNUMBER]

CATI: Thank you for your time and co-operation in this survey. On behalf of Ofwat I would like to thank you for your time and feedback, and I hope you enjoy the rest of your day/evening.

ONLINE: Thank you for your time and co-operation in completing this survey. On behalf of Ofwat we would like to thank you for your time and feedback.

Interviewer Confirmation

I confirm that this interview was properly conducted and is completely confidential

Yes

No

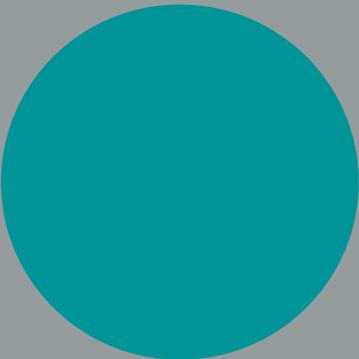
SYSTEM INFORMATION

Time interview completed:



Appendix B

CES Questionnaire



SYSTEM INFORMATION:

Interviewer number:

Interviewer name:

Date:

Time interview started:

C-MeX CES

CATI Good morning/afternoon/evening. My name is and I am calling from Accent on behalf of Ofwat, the economic regulator for the water sector in England and Wales.

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. INTERVIEWER IF NECESSARY, SAY: You don't need to be the person responsible for paying the water bill.

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. Accent abides by data protection laws at all times.

You can find out more information about Ofwat's surveys and what is done with the information collected in the Privacy Notice on Ofwat's website.

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

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

IF NECESSARY:

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

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

Yes

No

INTCHECK. INTERVIEWER: PLEASE CONFIRM YOU HAVE ADVISED THE PARTICIPANT OF:

Calls being recorded

INTCHECK2. INTERVIEWER: PLEASE CONFIRM YOU HAVE ASKED AND CHECKED THAT THE PARTICIPANT IS NOT TAKING THE INTERVIEW ON A MOBILE DEVICE WHILE DRIVING OR OPERATING EQUIPMENT

Yes, it is safe for the participant to proceed

No, it isn't safe – we need to call back later GO TO APPT SCREEN

FACE TO FACE: Good morning/afternoon/evening. My name is from Accent, an independent research agency. We are conducting a survey on behalf of Ofwat, the economic regulator for 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.

INTERVIEWER IF NECESSARY, SAY: You don't need to be the person responsible for paying the water bill.

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. Accent abides by data protection laws at all times.

You can find out more information about Ofwat's surveys and what is done with the information collected in the Privacy Policy on Ofwat's website. You can find the details here: **INTERVIEWER TO HIGHLIGHT RELEVANT INFORMATION ON LETTER OF AUTHORITY.**

IF NECESSARY:

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

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

Yes

No

Scoping questions

Q1. Please can I just check which water company supplies water to your home? DO NOT READ OUT.

SINGLE CODE.

Affinity Water
 Anglian Water
 Bournemouth Water
 Bristol Water
 Cambridge Water
 Essex & Suffolk Water
 Hafren Dyfrdwy
 Hartlepool Water
 Northumbrian Water
 Portsmouth Water
 Severn Trent Water
 South East Water
 Southern Water
 South Staffs Water
 South West Water
 Sutton & East Surrey (SES) Water
 Thames Water
 United Utilities
 Welsh Water/Dŵr Cymru
 Wessex Water
 Yorkshire Water
 Don't know **GO TO Q2**

CHECK QUOTAS

Q2. ASK IF DON'T KNOW AT Q1 (OTHERS GO TO Q3). Please could I have your postcode and I will check who your supplier should be?

INTERVIEWER CHECK WATER COMPANY USING POSTCODE CHECKER. Based on your postcode area, I believe your water supply company should be [Water Company]. Is that correct?

Yes
 No/don't know **THANK & CLOSE**

CHECK QUOTAS

Q3. We need to speak to a representative sample of customers of each water company, so before we start can I please check your age?

- 18-29
- 30-44
- 45-64
- 65+

CHECK QUOTAS

Q4. **INTERVIEWER: RECORD GENDER**

- Male
- Female

CHECK QUOTAS

Main Questionnaire

Q5. **READ OUT:** Throughout this survey, please only think about your domestic water services.

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

INSERT SCORE _____

Q6. **IF Q5=9 OR 10 ASK (OTHERS GO TO Q7):** What did they do well?

.....

GO TO Q9

Q7. **IF Q5=7 OR 8 ASK (OTHERS GO TO Q8):** What could they have done to improve this score?

.....

GO TO Q9

Q8. **IF Q5=0 TO 6 ASK (OTHERS GO TO Q9):** What could they have done better?

.....

Q9. If you could choose your water provider, based on your recent experience, how likely would you be to recommend [Water Company] to friends and family? Please use a scale of 0-10, where 0=not at all likely and 10=extremely likely.

INSERT SCORE _____

Q10. Please can I take a note of your name and where we can contact you for quality control purposes?

Name:
 Telephone:

End

Thank you for your time and co-operation in this survey. On behalf of Ofwat I would like to thank you for your time and feedback, and I hope you enjoy the rest of your day/evening.

FACE-TO-FACE: INTERVIEWER HAND OVER THANK YOU LEAFLET

Interviewer Confirmation

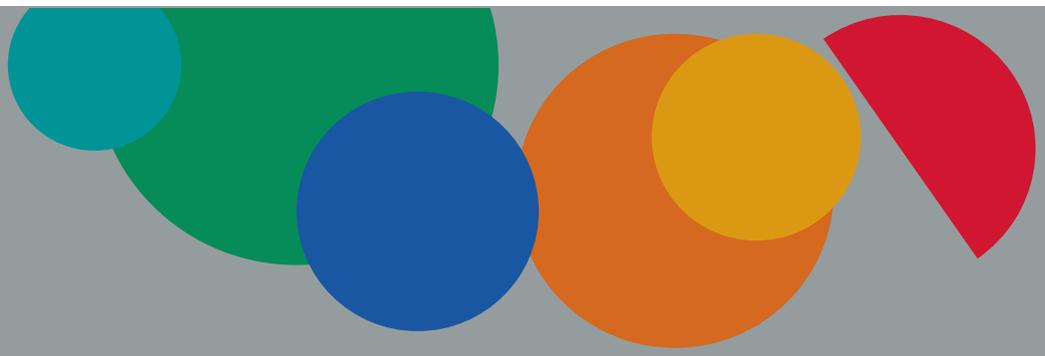
I confirm that this interview was properly conducted and is completely confidential

Yes

No

SYSTEM INFORMATION

Time interview completed:



Appendix C

D-Mex Questionnaire

SYSTEM INFORMATION:

Interviewer number:

Interviewer name:

Date:

Time interview started:

D-MeX

Good morning/afternoon/evening. My name is and I am calling from Accent on behalf of Ofwat, the economic regulator for the water sector in England and Wales. Please could I speak to [NAME FROM SAMPLE]. We are carrying out a survey on behalf of Ofwat to understand how customers rate the service received from the Developer Services 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 [WATER UK METRIC] – this was in [MONTH], for [SITE]. Please could I ask you some questions about this?

Are you the person who was in contact with [Water Company Name]?

IF TALKING TO CORRECT PERSON, CONTINUE. OTHERWISE ASK TO BE TRANSFERRED OR MAKE APPOINTMENT TO CALL BACK

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

Just to confirm, your responses will be treated in the strictest confidence. Accent abides by data protection laws at all times. Your responses will only be passed on to [Water Company Name] in anonymised form and will not be linked to you personally.

You can find out more information about Ofwat's surveys and what is done with the information collected in the Privacy Policy on Ofwat's website.

INTERVIEWER TO DETERMINE IF PARTICIPANT WANTS WEBSITE ADDRESS BEFORE PROVIDING IT OR IF IT IS TO BE SENT VIA EMAIL. IF SO, SAY

In that case, please can I take your email address and I'll send you a link to the policy.

TYPE IN EMAIL ADDRESS, CAREFULLY CHECKING SPELLING AND READ BACK TO PARTICIPANT

ONCE PRESSED 'SEND', ASK PARTICIPANT TO CHECK WHETHER THEY HAVE RECEIVED EMAIL. IF NOT, CHECK AND RE-SEND

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

IF NECESSARY:

- You have 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]

Meeting agreed deadlines																			
Their efficiency in handling this stage of the work																			
Accuracy and completeness of any documentation provided (eg quotations, plans, reports etc)																			
Any advice and guidance they gave you, to help progress the work																			

Q4. How satisfied are you overall with how [Water Company] 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	N/A
0	1	2	3	4	5	6	7	8	9	10	11	12

Q5. 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 the service is delivered?

.....
 Don't know
 Nothing

Q6. If there was **one** thing that you'd suggest that the Developer Services team at [Water Company] could do, that would have most impact on how easy you find them to deal with, what would it be?

Note to interviewer: ONE thing please!

 Don't know
 Nothing

Q7. Please can I take a note of your name and where we can contact you for quality control purposes?

Name: [CATI: DP, IMPORT FROM ID]
 Telephone: [CATI: DP, IMPORT FROM TELNUMBER]

Thank you for your time and co-operation in this survey. On behalf of our client Ofwat and ourselves at Accent, I would like to thank you for your time and feedback.

Interviewer Confirmation

I confirm that this interview was properly conducted and is completely confidential
 Yes
 No

SYSTEM INFORMATION Time interview completed:

Appendix D

Code Frames



CSS Codes for ‘open’ questions

Q7. Please tick the closest detailed issue that applies.

- 1. Amend personal details on account
- 2. A query about a bill
- 3. A query about a payment
- 4. Due to a recent move, or planning to move
- 5. Direct debit set-up
- 6. Payment plan set-up
- 7. Direct debit query
- 8. To make a payment
- 9. To advise that I’m unable to pay
- 10. To apply for/to get a water meter
- 11. To give/request a water meter reading
- 12. To report a problem with my meter/meter query
- 13. To request a refund
- 14. To notify of a customer having died
- 15. To query a reminder or debt collection activity
- 16. The bill seemed too high
- 17. Payment card query
- 18. Asking for a reduction/discount in bill
- 19. Online account problem/setting up
- 20. To make a query or complaint about the website
- 21. To make a query or complaint about a customer service issue
- 22. Other, please specify
- 23. To change Direct Debit
- 24. Removal of water meter
- 25. Water usage query
- 26. To register as a vulnerable person/enquire about PSR
- 27. Set up/close account
- 28. Water related issue
- 29. Waste related issue

Q8. Please pick the closest detailed issue that applies.

- 1. About a faulty meter
- 2. About a meter installation
- 3. About finding the location of water equipment (incl. pipes/meter/stopcock)
- 4. About the taste or smell of the tap water
- 5. About the colour of the tap water
- 6. Because the tap water is/was making me feel ill
- 7. Because of a water leak/burst on the road
- 8. Because of a water leak/burst on my property
- 9. Regarding low pressure of tap water
- 10. No supply/water gone off
- 11. Asking for water supply to be turned on/off
- 12. About flooding with clean/drinking water
- 13. About a leak on my meter
- 14. About a connection to the water supply network
- 15. About the Lead and Common Supply Pipe Scheme
- 16. About defective/dangerous water equipment i.e. stop-taps, manhole covers, hydrants, raised/sunken chambers
- 17. High pressure from my tap
- 18. About the hardness of the water
- 19. Other, please specify
- 20. Domestic leak – at neighbour’s etc

- 21. Maintenance/alteration of equipment
- 22. Meter reading
- 23. Misuse of water
- 24. Meter related query
- 25. Usage of water – volume etc
- 26. Water saving advice/equipment
- 27. Billing related issue
- 28. Waste related issue
- 29. About content of water – fluoride etc

Q9. Please pick the closest detailed issue that applies.

- 1. About a blockage in the sewer/drains
- 2. About faulty wastewater equipment or sewer pipes
- 3. About flooding with sewerage or foul water
- 4. About smells from sewers and sewage treatment works
- 5. About finding the location of sewers, drains etc
- 6. About a connection to the sewer, wastewater network
- 7. Empty septic tank
- 8. Private sewer enquiry
- 9. Regarding a poor reinstatement
- 10. Toilet query
- 11. Other, please specify
- 12. Low water pressure
- 13. Maintenance/upgrade of equipment
- 14. Water related issue
- 15. Billing related issue

Q13. What did they do well?

- 1. Everything – great service/easy etc
- 2. Resolved issue
- 3. Responsive/quick
- 4. Good customer service/relations – staff are polite/friendly/helpful/knowledgeable
- 5. Good communications/provision of information
- 6. Efficient
- 7. Professional
- 8. Easy to contact
- 9. Supply is good/well managed – alternative water supply provided in emergencies etc
- 10. Good water quality – any issue resolved
- 11. Water pressure is good/well managed
- 12. Good management of leaks
- 13. Workforce is good – standard of work etc
- 14. Kept promises
- 15. Happy with automated service
- 16. Good understanding/supportive
- 17. Offered refund/compensation
- 18. Good timescale/timekeeping – prompt etc
- 19. Good service/response during pandemic/lockdown – social distancing observed etc
- 20. Billing is good – amendments made/issues rectified
- 21. Payment system is good – issues rectified
- 22. Metering is good
- 23. Good management of infrastructure – drains/blockages etc
- 24. Sewerage service is good – issues rectified
- 25. Good online service/website/app
- 26. Happy with meter reading – advice/provision etc
- 27. Good account management – including opening/closing etc
- 28. Price/tariff is good – affordable/discounts

- 29. Additional services offered for vulnerable customers
- 33. Nothing
- 37. Helpful when struggling to pay – payment plans etc
- 96. Other
- 99. Don't know

Q14. What could they have done to improve this score?

- 1. No problems with service
- 2. Nothing – can't think of anything
- 3. Room for improvement
- 4. Lower bills/reduce prices
- 5. Improve water pressure
- 6. Better management of supply – resolve issues
- 7. Improve water quality
- 8. Customer service/relations should be improved – communication/notifications/ease of contact
- 9. Better management of leaks
- 10. Should be more responsive – resolve issues quickly
- 11. Hard water (area) – reduce hardness
- 12. Better meter reading service required
- 13. Better billing – frequency/accuracy/timeliness
- 14. Provide better online service/website/app
- 15. Resolve metering issues
- 16. Better workforce – more efficient/considerate/better organised
- 17. Better service/response during pandemic/lockdown
- 18. Take greater responsibility
- 19. Provide better sewerage service
- 20. Better management of drains required
- 21. Improve/upgrade infrastructure
- 22. Issues with automated service
- 23. Improve payment system
- 24. Resolve issue – deal with problem (issue not resolved)
- 25. Offer refund/compensation
- 26. Provide better service for vulnerable customers
- 27. Provide better service (general) – not have problem in first place
- 28. Service is adequate in current circumstances
- 48. Better account management required
- 49. Should keep promises
- 96. Other
- 99. Don't know

Q15. What could they have done better?

- 1. Be more responsive – resolve issues quickly, accurately
- 2. Better communication – provision of information etc
- 3. Better meter reading service – resolve issues
- 4. Better internal communication - between departments etc
- 5. Resolve issue/outstanding query
- 6. Take greater responsibility
- 7. Better handling of issues with water pipes and leaks
- 8. Better billing – make it clear/informative etc
- 9. Better billing – billing issues/complaints/overcharges
- 10. Provide better support for vulnerable customers
- 11. Better handling of sewerage issues
- 12. Better customer service/relations – understanding/knowledgeable/ease of contact etc
- 13. Provide language translation services
- 14. Nothing

- 15. Clean up/tidy/repair premises after work completion
- 16. Better communication after works carried out
- 17. Provide financial support during Covid-19
- 18. Never been privatised
- 20. Resourcing/staffing issues during Covid-19
- 21. Better handling of issues with pressure
- 22. Everything
- 23. Resolve website/app issues – make it user-friendly/more informative.
- 24. Resolve automated call – make it easier/clearer
- 26. Irrelevant
- 28. Lower bills/reduce prices
- 29. Improve water quality
- 30. Better metering service – resolve issues etc
- 31. Better account management required
- 32. Better management of supply – resolve issues etc
- 33. Improve/upgrade infrastructure – greater investment
- 34. Provide refund/compensation – resolve any payment issues
- 35. Kept promises
- 36. Better workforce – more efficient/considerate/better organised
- 37. Better management of drains required
- 38. Better service/response during pandemic/lockdown
- 39. Happy with service (overall)
- 42. Improve payment system
- 43. Would like to choose/switch supplier – market competition
- 44. Better timescales - avoid delays/meet deadlines
- 96. Other
- 99. Don't know

CES Codes for 'open' questions

Q6. What did they do well?

- 1. No problems – happy with service
- 2. Service is good for price
- 3. Billing is good – clear, timely etc
- 4. Bill is affordable/reasonable – have option to spread cost/payment plans etc
- 5. On meter – price has decreased/can control usage etc
- 6. Supply is reliable/constant – alternative water provided in emergencies etc
- 7. Water quality is good
- 8. Water pressure is good
- 9. Customer service/relations is good – communication/kept updated/helpful
- 10. Service is responsive – quick to resolve issues
- 11. Maintenance/improvements to service provided - resolve issues
- 12. No/little contact
- 13. Efficient/proactive
- 14. Good management of leaks – no/few instances
- 15. Just pay bill
- 16. Good meter reading service
- 17. Happy with online service/app
- 18. Refunds/compensation provided
- 19. No/few problems with shortages/hosepipe bans
- 20. Additional services provided for vulnerable customers – lower tariffs/priority services register etc
- 21. Provide insurance
- 22. Good compared to other water companies/areas

- 23. Not-for-profit company
- 24. Happy with sewerage service
- 25. Good response/service during lockdown/Covid-19
- 26. Provide water-saving advice/devices
- 27. Work(ed) for them/know someone who works for them
- 28. Can't make comparison/no choice of supplier
- 40. Not put me on a water meter
- 41. Don't know
- 42. Nothing/can't think of anything
- 43. Other
- 44. Metering service is good – provision/maintenance etc
- 45. Good management of drains
- 46. Workforce is good – standard of work/stuck to timescale/tidy etc
- 47. Happy with payment system
- 48. Supply water - provide water and/or waste water service
- 49. Easy to setup/close account – moving house etc.
- 50. Improve the environment – clean beaches/rivers/less plastic/reduced carbon footprint

Q7. What could they have done to improve this score?

- 1. No problems – satisfied with service
- 2. Nothing – can't think of anything
- 3. Always room for improvement – don't give 10/10
- 4. Lower bills/reduce prices
- 5. Improve water pressure
- 6. Better supply – resolve issues etc
- 7. Water quality should be improved
- 8. Customer service/relations should be improved – communication/notifications/ease of contact
- 9. Better management of leaks
- 10. Should be more responsive – resolve issues quickly etc
- 11. Hard water (area) – reduce hardness etc
- 12. Better meter reading service required
- 13. Better billing – accurate/timely/clear/accessibility
- 14. Resolve metering issues -
- 15. Be more efficient/proactive – workforce/planning/roadworks/communication etc
- 16. Provide better sewerage service
- 17. Better management of drains required
- 18. Improve/upgrade infrastructure – greater investment required
- 19. Reduce issues with shortages/hosepipe bans
- 20. Less focus on profits/shareholder dividends
- 21. Provide better online service
- 22. Don't know enough about them
- 23. No/little contact
- 24. Just pay bill
- 25. Service is neither good nor bad
- 26. No choice of supplier – can't make comparison
- 37. Don't know
- 38. Other
- 39. Work to protect environment – prevent pollution etc
- 40. Provide free service
- 41. Provide water saving advice/devices
- 42. Refunds/compensation/reduction - provision/ease
- 43. Having better knowledge of their own infrastructure
- 44. Provide additional service for vulnerable customers – awareness/PSR/lower tariffs
- 45. More support during pandemic – contact/bill reduction etc.

Q8. What could they have done better?

- 1. No problems with service
- 2. Nothing – can't think of anything
- 3. Room for improvement
- 4. Lower bills/reduce price – discounts etc
- 5. Improve water pressure
- 6. Supply should be improved – resolve issues
- 7. Better water quality
- 8. Better customer service/relations – communication
- 9. Better management of leaks
- 10. Be more responsive – resolve issues quickly etc
- 11. Hard water (area) – resolve issues
- 12. Better meter reading service
- 13. Better billing – clear/informative/accurate etc
- 14. Resolve metering issues
- 15. Be more efficient – workforce/management of roadworks etc
- 16. Better sewerage service
- 17. Better management of drains – flooding etc
- 18. Improve/upgrade infrastructure – more investment
- 19. Take greater responsibility
- 20. Provide better online service
- 21. Water should be nationalised
- 22. Company should work to protect environment
- 23. No/little contact
- 24. Just pay bill
- 25. Just use water – basic utility etc
- 26. Neither good nor bad
- 27. No choice of supplier/can't make comparison
- 28. Unhappy being on a water meter
- 35. Don't know
- 36. Other
- 37. Provide better service for vulnerable customers – disabled/health issues etc

DMEX Codes for 'open' questions

Q1. What do you feel the water company did well, if anything, in relation to this particular transaction?

- 1. Everything
- 2. No problems – happy with service
- 3. Service is average – neither good nor bad
- 4. Not happy with service provided (general)
- 5. Nothing
- 6. Responsive – quick etc
- 7. Good communication/provision of information – clear etc
- 8. Good customer service/relations – polite, helpful etc
- 9. Timescales – suitable/accurate/prompt attendance
- 10. Happy with quotation process – timely etc
- 11. Speed of service – quick turnaround
- 12. Straightforward process
- 13. Efficient
- 14. Happy with connection – good installation etc
- 15. Good workforce/engineers – tidy, considerate etc
- 16. Happy with site visit/inspection
- 17. Good response/service during pandemic

- 18. Ease of contact – direct/single P-O-C
- 19. Happy with application
- 20. Kept informed – updates provided
- 21. Online service is good – website/portal
- 22. Good working relationship/understanding of requirements
- 23. Professional
- 24. Good design/planning
- 25. Good delivery on commitments – did what they said etc
- 26. Work is at an early stage/incomplete
- 27. Flexible approach – alternative options explored etc
- 28. Cost – good price
- 29. Provided refund/compensation
- 96. Other
- 99. Don't know

Q2. What do you feel that they could have done better, if anything – again in relation to this particular transaction?

- 1. Nothing/can't think of anything
- 2. No problems – happy with service
- 3. Better communication/provision of information – detail/relevance/transparency/consistency etc.
- 4. Should be more responsive - frequency/speed etc.
- 5. Reduce cost – overpriced
- 6. Improve speed of service – quicker turnaround
- 7. Easier to contact – direct/single P-O-C/available staff
- 8. Better understanding of client requirements/better working relationship
- 9. Better customer service/relations – more helpful etc
- 10. Avoid delays/fewer delays – improve timescales
- 11. Be more efficient/organised/proactive
- 12. Improve quotation process e.g. quick/accurate/clear
- 13. Better coordination of departments/teams/agencies
- 14. Issues due to pandemic – understandable/unavoidable
- 15. Improve online service – website/portal/app
- 16. Better follow-up – provide updates etc
- 17. Better workforce/subcontractors – tidy/considerate/quality of work/knowledgeable
- 18. Improve application process – easier/tailored etc
- 19. Better knowledge of site/location – plans/records/up to date etc
- 20. Better survey/site inspection - earlier/scheduling/flexible
- 21. Greater flexibility – explore alternative options/changes to application
- 22. Process should be simpler/more straightforward
- 23. Better connection/installation - scheduling work/carrying out/checking completed work
- 24. Free service – enquiries/application/quotation
- 25. Improve payment system
- 26. Everything
- 27. Better billing – accurate/more informative/scheduling of invoices
- 28. Better provision of refunds/compensation/discounts
- 29. Work is ongoing – complete work/resolve issue
- 30. Better design/planning/traffic management stage
- 31. Deliver on commitments – keep promises/do what they say etc
- 32. Take greater responsibility
- 96. Other
- 97. NS
- 99. Don't know

Q5x1/2/3. Thinking generally about dealing with Developer Services – what would you personally say are the top three most important things you are looking for, in terms of how the service is delivered?

- 1. Accuracy
- 2. Ease of contact – direct contact/single P-O-C/by phone etc
- 3. Communication
- 4. Clarity - cost/information/requirements etc.
- 5. Easy/straightforward process – simplicity etc
- 6. Efficiency
- 7. Provision of information/explanation of process – specific to customer
- 8. Adherence to timescales – meeting deadlines
- 9. Responsiveness
- 10. Speed – turnaround etc
- 11. Timeliness
- 12. Understanding/knowledge
- 13. Cost – value for money
- 14. Personal service/contact – aftercare etc
- 15. Customer service – helpfulness etc.
- 16. Punctuality/Promptness
- 17. Availability
- 18. Provision of quote – speed/accuracy etc
- 19. Application process – ease/speed/tailored etc
- 20. Job completion – delivery
- 21. Quality of service/work – including workforce, office, site inspection
- 22. Accessibility
- 23. Online service/website – user-friendly/informative/up to date/tracking etc
- 24. Continuity/reliability/consistency
- 25. Flexibility - alternative solutions
- 26. Delivery on commitments – doing what they say
- 27. Programming/scheduling
- 28. Site visit – on-site presence
- 29. Nothing further – can't think of another
- 31. Accountability
- 32. Follow-up – feedback/updates/confirmation etc
- 33. Transparency – openness/honesty etc
- 34. Design/planning – process/speed/accuracy etc
- 35. Professionalism
- 36. Meeting/understanding client needs/requirements
- 37. Documentation - certificate of work etc.
- 38. Health & Safety
- 39. Project management
- 40. Guidance/Advice
- 41. Tidiness/Cleaning up
- 42. Coordination/collaboration – with customer/departments/agencies
- 43. Payment Options – multiple/ease/tracking etc.
- 95. Other
- 98. Nothing
- 99. Don't Know

Q6. If there was one thing that you'd suggest that the Developer Services team at #QWATERCOMPANY# could do, that would have most impact on how easy you find them to deal with, what would it be?

- 1. Easier to contact (general)
- 2. Provide single/dedicated point of contact – e.g. Account Manager etc
- 3. Improve communication – updates etc

- 4. Provide direct contact (via phone etc) with key personnel – local rep/engineer/designer
- 5. Better customer service – less automated/human interaction etc
- 6. Improve/develop website/online service – navigation/functionality/information provided
- 7. Lower cost/charges
- 8. Provision of information/explanation of process – simple/clear etc
- 9. Be more responsive
- 10. Better understanding of client requirements/working relationship
- 11. Application process/pre-application service – easier/user-friendly/tailored
- 12. Quotation service – greater clarity/accuracy/speed
- 13. Better knowledge of site/location - provision of plans/records
- 14. Better management of works/provision of workers/subcontractors
- 15. Easier/simpler process – less bureaucratic etc
- 16. Provide site visit/survey – face-to-face contact/discussion
- 17. Better speed of service (overall)/quicker turnaround
- 18. Timescales – better provision of/adherence to
- 19. Improve payment system
- 20. Better staffing – more resource/training
- 21. Improve internal communication – between departments/teams
- 22. Greater openness/transparency
- 23. Greater accessibility
- 24. Better consistency/continuity
- 25. Better collaboration with different agencies/other utility companies
- 26. Nothing – happy with service provided
- 28. Better inspection service - helpful/informative/earlier stage
- 29. Greater flexibility
- 30. Free service
- 31. Greater efficiency
- 32. Be more proactive – better follow-up/offer solutions etc
- 33. Greater clarity (general)
- 34. Better connection/installation
- 35. Accuracy – of information/records etc
- 36. Provide better response/service during pandemic
- 37. Better design/planning stage
- 38. Deliver on commitments – keep promises/do what they say
- 95. Other
- 98. Nothing
- 99. Don't Know

Appendix E

Qualitative D-MeX metrics

- W1.1 Pre-development enquiry – reports issued within target
- W3.1 s45 quotations – within target
- W4.1 s45 service pipe connections – within target
- W6.1 Mains design 500 plots – quotations within target
- W7.1 Mains design >500 plots – quotations within target
- W8.1 Mains construction within target
- W17.1 Mains diversions (without constraints) – quotations within target
- W17.2 Mains diversions (with constraints) – quotations within target
- W18.1 Mains diversions – construction/commissioning within target
- W20.1 Self lay Point of Connection report < 500 plots etc – reports issued within target
- W21.1 Self lay Point of Connection reports >500 plots etc – reports issued within target
- W23.1 Self lay design and terms request 500 plots etc – quotations within target
- W24.1 Self lay design and terms request >500 plots etc – quotations within target
- W25.1 Self-lay signed agreement – acknowledgements within target
- W26.1 Self lay water for pressure/bacteriological testing – provided within target
- W27.1 Self lay permanent water supply – provided within target
- W28.1 Self-lay vesting certificates – issued within target
- W29.1 Self-lay Asset Payments – issued within target
- W30.1 Self lay plot references and costing details – issued within target
- S1.1 Pre-development enquiry – reports issued within target
- S3.1 Sewer requisition design – offers issued within target
- S4.1 Sewer requisition – constructed and commissioned within agreed extension
- S6.1 Technical vetting of adoptions & diversions – approval or rejection letters within target
- S7.1 Adoption legal agreement – draft agreements issued within target
- S8.1 s106 sewer connection – approval letters issued within target
- S9.1 s106 sewer connection – rejection letters issued within target
- WN1.1 % of confirmations issued to the applicant within target period
- WN2.2 % Bulk supply offer letters issued to the applicant within target period
- WN3.1 % Bulk water supply agreement signed and issued to the applicant within target period
- WN4.1 % of main laying schemes constructed and commissioned within the target period
- WN4.2 % of testing supplies provided within target period
- WN4.3 % of permanent supplies made available within the target period
- SN2.2 % Bulk discharge offer letters issued to the applicant within target period
- SN3.1 % Bulk discharge agreement signed and issued to the applicant within target period
- SN4.1 % of main laying schemes constructed and commissioned within the target period
- SAM 1/2 Review pre-design application
- SAM 2/2 Review Design Step 1: Full design review and response
- SAM 2/3 Review Design Step 2: Design acceptance
- SAM 3/1 Update draft agreement
- SAM 4/1 Inspections & construction period
- SAM 5/1 Request for pre maintenance inspections

- SAM 5/2 Issue pre maintenance certificate/provisional certificate 
- SAM 6/2 Issue vesting certificate
- SLPM – S1/2 Review PoC proposal
- SLPM – S2/1b Water Company to Review SLP design application
- SLPM – S2/2a Provide design
- SLPM – S2/2b Water Company to Provide design acceptance
- SLPM – S3 Review / revise Water Adoption Agreement
- SLPM – S4/1 Source of Water Delivery Date
- SLPM – S5/1a Review request and carry out Final Connection
- SLPM – S5/1b Review application and agree date of Final Connection
- SLPM – S6 Issue vesting certificate
- SLPM – S7/1 Validate notification and provide consent to progress with connection

Note: SLPM metrics were added on 1 October 2020