

CCWater Research Report Testing the Waters 2016 Summary of Research Findings for Dŵr Cymru Welsh Water

Sample size is shown in brackets and excludes don't knows unless followed by an asterisk (*)
Average proportion for all WaSCs and for England and Wales is based on weighted data. All other data is unweighted

Observations made under comments or points of interest which are significant differences are shown by §

Indicative finding based on a small sample size, to be treated with care, shown by **

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Satisfaction with water and sewerage services				
Overall satisfaction with water supply (Sample size: 200)	94%	87% to 95%	92%	92% for England and Wales
Overall satisfaction with sewerage services (Sample size: 178)	65%	65% to 81%	74%	74% for England and Wales
Top answer: what single improvement to their services would businesses most like (unprompted) (Sample size: 200) <i>Cheaper bills/less charges</i>	14%	12% to 31%	19%	18% for England and Wales
Satisfaction with value for money				
Satisfied with value for money of water services (Sample size: 200)	65%	51% to 71%	65%	66% for England and Wales
Satisfied with value for money of sewerage service (Sample size: 179)	66%	50% to 70%	64%	65% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Satisfied with value for money of surface water drainage service (Sample size: 46)	61%	40% to 70%	54%	Small sample size: indicative finding 55% for England and Wales
Satisfied with value for money of trade effluent (Sample size: 20**)	60%	55% to 78%	61%	Small sample size: indicative finding
Top answer: causes of dissatisfaction with value for money (unprompted) (Sample size: 21**) <i>Cost/prices have risen</i>	57%	32% to 64%	47%	Small sample size: indicative finding <i>Cost/prices have risen</i> 47% for England and Wales
Integrity				
Agree company cares about service given to customers (Sample size: 200)	69%	49% to 73%	61%	59% for England and Wales
Trust company (mean score – where 10 is trust completely and 1 is do not trust at all) (Sample size: 200)	8.03	6.97 to 8.03	7.53	7.62 for England and Wales
Agree that the main water and sewerage bill for this site is clear on how much needs to be paid and when (Sample size: 200)	75%	72% to 84%	79%	80% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Top answer: what billing improvement would businesses like to see (unprompted) (Sample size:200) <i>Cheaper</i>	16%	10% to 18%	13%	<i>Cheaper</i> 13% for England and Wales
Consumer Rights and Responsibilities				
Aware of GSS scheme (Sample size: 200)	49%	38% to 56%	46%	45% for England and Wales
Aware of Surface Water Drainage rebate (Sample size: 200)	33%	16% to 45%	33%	31% for England and Wales
Agree that water company provides the advice and support needed on water & sewerage services and billing arrangements (Sample size: 200)	57%	36% to 57%	47%	46% for England and Wales
Top answer: what kind of advice and support do businesses expect to receive from companies? (unprompted) (Sample size: 21** All those who disagree that they get the advice and support you need) <i>Ways to reduce the bill</i>	33%	22% to 50%	34%	Small sample size: indicative finding Top answer: <i>Ways to reduce the bill</i> 35% for England and Wales
Businesses which have looked for information on water/sewerage services (Sample size: 200)	10%	6% to 14%	9%	8% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Top answer: Where did these businesses look for information? (Sample size: 20**) <i>Internet</i>	35%	20% to 76%	40%	Small sample size: indicative finding 40% for England and Wales
Top answer – information requested: <i>Managing your water use for domestic type use, such as flushing toilets, filling kettles and so on</i> (prompted) (Sample size: 200 ¹)	1%	<1% to 1%	<1%	5% for Dŵr Cymru Welsh Water
Top answer – information offered: <i>Information which businesses have been offered by water companies in the last year</i> (prompted) (Sample size: 200)	1%	<1% to 3%	1%	7% for Dŵr Cymru Welsh Water
Routinely read information with bill or on back of bill (Sample size: 200)	42%	40% to 49%	44%	43% for England and Wales
Contacted water company with query or complaint in last 12 months (Sample size: 200)	13%	13% to 26%	17%	Main reasons for contact were regarding a <i>sewerage problem</i> (31%) or to make a <i>billing enquiry</i> (23%)

¹ Very few businesses were able to give specifics in relation to this question

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Satisfied with way query or complaint handled (Sample size: 26** who made contact)	85%	39% to 86%	67%	Small sample size: indicative finding
Water on Tap				
Satisfied with colour and appearance of tap water (Sample size: 200)	93%	88% to 95%	92%	92% for England and Wales
Satisfied with taste and smell (Sample size: 198)	88%	80% to 88%	85%	84% for England and Wales
Satisfied with hardness/softness (Sample size: 198)	83%	51% to 83%	67%	62% for England and Wales
Satisfied with safety (Sample size: 200)	89%	84% to 91%	89%	88% for England and Wales
Satisfied with reliability of supply (Sample size: 200)	95%	92% to 99%	96%	96% for England and Wales
Satisfied with water pressure (Sample size: 199)	90%	86% to 93%	90%	90% for England and Wales
A Sewerage System that Works				
Satisfied with company actions to reduce smells from sewerage treatment works (Sample size: 143)	45%	45% to 61%	53%	53% for England and Wales
Satisfied with maintenance of sewerage pipes & treatment works (Sample size: 150)	46%	45% to 60%	53%	53% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Satisfied with company cleaning of waste water before releasing it back into environment (Sample size: 152)	43%	37% to 53%	45%	44% for England and Wales
Satisfied with company actions to minimise sewer flooding (Sample size: 166)	47%	47% to 61%	53%	54% for England and Wales
Satisfied with removal of surface water drainage from site (Sample size: 152)	53%	53% to 71%	62%	63% for England and Wales
Satisfied with removal of trade effluent from site (Sample size: 15**)	80%	38% to 85%	71%	Small sample size: indicative finding 71% for England and Wales
Service failure				
Ever suffered a failure of water/sewerage services (Sample size: 200)	10%	10% to 17%	14%	12% for England and Wales
Top cause of service failure (unprompted) (Sample size: 20**) <i>Burst pipe</i>	35%	17% to 49%	32%	Top cause: <i>Burst pipe</i> 30% for England and Wales
Major impact on business (Sample size: 20**)	65%	21% to 65%	46%	Small sample size: indicative finding 43% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Satisfied with company response to event (Sample size: 20**)	75%	52% to 83%	74%	Small sample size: indicative finding Top reasons for dissatisfaction with company response are <i>it all took too much time/took too long</i> (40%) and <i>very slow to attend/slow to respond</i> (40%) (unprompted – base: 5)
Market Reform				
Awareness of market reform (unprompted) (Sample size: 200)	3%	3% to 12%	8%	8% for England and Wales Awareness increases with business size and ranges from 5% (micro) to 41% (large)
Awareness of market reform (prompted) (Sample size: 200)	9%	9% to 17%	14%	13% for England and Wales Awareness increases with business size and ranges from 9% (micro) to 49% (large)
Top answer: How did you find out? (unprompted) (Sample size: 17**) <i>From Press/ Newspaper/ magazine and News</i>	18% and 18%	4% to 23% and 3% to 29%	14%	Small sample size: indicative finding 14% for England and Wales

	Percentage of Dŵr Cymru Welsh Water business customer respondents	Range for WaSCs	Average percentage for all WaSCs	Comments or points of interest
Agree that the principle of competition for retail services is a good thing (Sample size: 200)	57%	55% to 69%	62%	61% for England and Wales
Likely to switch in 2017 (Sample size: 200)	N/A	N/A	N/A	N/A
Likely to negotiate terms with current provider (Sample size: 200)	N/A	N/A	N/A	N/A
Extremely likely to recommend the company to friends and family as a provider ² (Sample size: 188)	49%	23% to 49%	34%	35% for England and Wales
Speaking up for consumers – Dŵr Cymru Welsh Water customers' views on:				
Aware of consumer body for the water industry (unprompted awareness) (Sample size: 200)	15%	12% to 24%	18%	18% for England and Wales
Aware of Consumer Council for Water before now (prompted awareness) (Sample size: 200)	16%	9% to 23%	14%	15% for England and Wales

- ² NPS: Extremely likely to recommend is based on the proportion of customers scoring 9 or 10.

Sample profile for Dŵr Cymru Welsh Water		(Sample size: 200)
Respondent role		
On-site company representative		44%
Head office company representative		21%
Both		30%
Scope of business		
Single site		14%
Multiple sites in England		11%
Multiple sites in Wales		21%
Multiple sites in England and Wales		13%
Business size – number of employees		
Micro 0-9 employees		55%
Small 10-49 employees		29%
Medium A 50-99 employees		6%
Medium B 100-249 employees		7%
Large 250+ employees		4%
Criticality of water and wastewater services to business operation		
Absolutely essential/essential (rating 9-10 out of 10)		74%
Not essential (rating 1-6 out of 10)		15%

- Statistical reliability on sample size of 200 is $\pm 4\%$ at 10%/90%, $\pm 6\%$ at 30%/70% and $\pm 7\%$ at 50%.