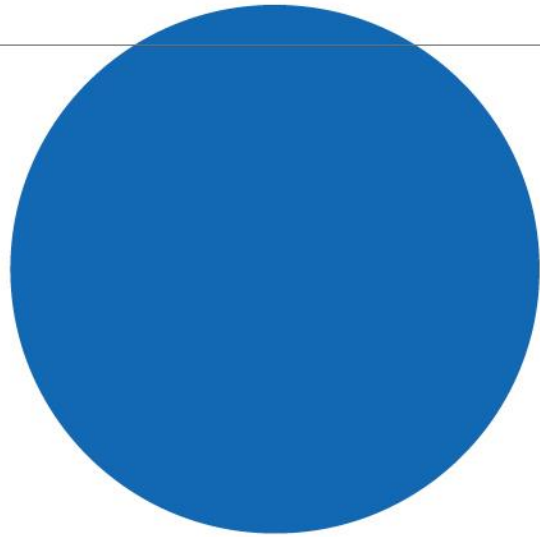


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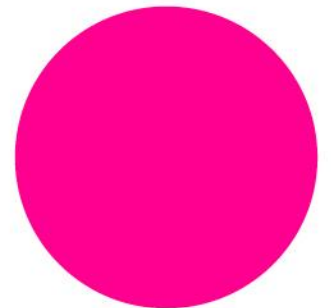
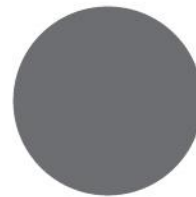
The voice for water consumers  
Llais defnyddwyr dŵr



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# Testing the Waters 2024: data report

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November 2024

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# 1. Executive summary

- 1.1. Every two years, the Consumer Council for Water (CCW) commissions 'Testing the Waters', a satisfaction survey tracking the views of business customers of the water industry in England and in Wales. This report looks at how and if customer views have changed over time. In addition, this report presents views on wholesale water, sewerage and retail services, along with differences in views between businesses in England and Wales and by size of business.
- 1.2. In total, 2,000 interviews were achieved via telephone with business customers between 16<sup>th</sup> March and 27<sup>th</sup> July 2024.
- 1.3. The questionnaire for the 2024 iteration of Testing the Waters has been updated from the previous 2022 survey, to reflect changing priorities for CCW and businesses, but the core focus of satisfaction with service provision remains.
- 1.4. The conclusion of the interviewing period for 2024's Testing the Waters coincided with the general election on 4<sup>th</sup> July 2024. In the lead up to this, various parties' campaigning platforms and manifestos included reference to the future of privatised utilities industries. This highlighted:
  - 1.4.1. The water industry has found itself under more scrutiny over the past few years than it had for a number of years' previously.
  - 1.4.2. The 2024 iteration of Testing the Waters was conducted against a unique backdrop where water and particularly sewerage service provision attained a higher profile in media and news output than had previously been the case.
- 1.5. This report provides detail across all questions covered in the 2024 Testing the Waters survey, and where possible (and applicable) attempts to draw conclusions against this wider contextual backdrop.



## Key findings

- 1.6. Business customers' satisfaction with their water, sewerage and retail services is broadly in line with 2022, with no significant satisfaction differences observed:
  - 1.6.1. As has historically been the case, business customers in Wales are significantly more satisfied with all aspects of their water, sewerage and retail services than business customers in England. In Wales, only large businesses (using more than 50 megalitres of water a year) can choose their water retailer.
  - 1.6.2. Among the minority who are dissatisfied with one or more aspects of their water, sewerage and/or retail services, reasons for dissatisfaction are broadly consistent with 2022, but we have seen an increase in dissatisfaction with sewerage services due to environmental concerns (+12% cf. 2022). This suggests that while overall satisfaction among business customers hasn't so far been significantly affected by wider news and media coverage of sewerage incidents in the UK over the past couple of years, there is an underlying dissatisfaction among a minority.
- 1.7. Despite customer satisfaction levels remaining consistent between 2022 and 2024, when asked the extent to which water service providers care about the service they provide to customers, and by extension the extent to which they can trust their water service provider, perceptions in both regards are significantly lower in 2024 than 2022. (Care about service has fallen by 7% to 39% in 2024, and trust has fallen by 6% to 49%):
  - 1.7.1. While satisfaction is unchanged from 2022, it is clear that business customers are now less likely to feel that their water supplier cares about the service it provides to customers, and the findings indicate that trust has fallen as well.<sup>1</sup>
- 1.8. Water saving activities undertaken by businesses across England and Wales have increased from 39% in 2022 to 43% in 2024:
  - 1.8.1. Of those engaging in water saving activity, the most common action is to make employees aware of the need to reduce consumption (12%)
  - 1.8.2. Among those who have not engaged in any water saving activity, the key reason relates to the perception that there is nothing (further) that can be done to reduce the amount of water used across business practices (45%)
- 1.9. Awareness of the retail market in England is unchanged in 2024 (57%) from 2022 (56%) – however, over a longer-term view, awareness of the retail market is significantly higher now than in the 12 months after opening in 2018 survey (43%):
  - 1.9.1. As has consistently been the case over the course of previous surveys, larger businesses are more likely to be aware of the retail market in England than smaller businesses.
  - 1.9.2. In 2024, 23% of businesses aware of the retail market in England have switched to a new retail provider, statistically in line with 2022 where 19% had switched. Similarly, 10% have renegotiated, in line with 8% in 2022. When combining the

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<sup>1</sup> The scale for 'trust' in 2024 changed to a 5pt. scale from a 10pt. scale previously – data comparisons should be treated with caution.



'affirmative' action of switching or renegotiating (32%) this is up significantly from 27% in 2022.

- 1.9.3. Businesses with less than 250 employees are significantly less likely to have switched (1-10, 32%; 11-50, 30%; 51-250, 33%) than businesses with more than 250 employees (47%). Also, when looking at business size and renegotiation rates, businesses with 51-250 employees are significantly more likely to have renegotiated (28%) than those with 1-10 employees (14%) and 11-50 employees (15%).
- 1.9.4. Among those who have switched retail service provider in England, almost 7 in 10 (69%) were satisfied with the switching process, and just 3% were dissatisfied.
- 1.9.5. From these customers aware of the retail market who have switched, a third (33%) say they have since received better service, and two-thirds (66%) say they have received better value for money. There is no significant difference in improved service or value for money perceptions across businesses of different sizes.
- 1.10. Awareness of the retail market conditions in Wales remains low, with just 12% aware of the existing arrangements. Just 3% of businesses are aware of the Welsh Government's legislative proposal to remove the option to switch water retailer for businesses with large water consumption (>50 megalitres of water per year).
- 1.11. In 2024, 21% of businesses told us they have contacted their retailer with an enquiry (15%) or a complaint (7%) – down from 24% in 2022. Contacts with water providers (6% enquiry, 3% complaint) are in line with 2022, as are contacts with sewerage providers (3% enquiry, 2% complaint).
- 1.12. In relation to reasons for contact, of those who contacted their retailer with a complaint, the predominant reason was an issue with a bill (62%, down from 72% in 2022), followed by poor customer service (19%), which has risen by 10% from 2022. Among those who contacted their retailer with an enquiry, this was most often due to a general billing query (68%), in line with 2022 (65%).
- 1.13. Among those who made a complaint to their retailer, 36% were satisfied with the outcome, up from 25% in 2022. And, of those who made an enquiry, 54% were satisfied with the outcome, in line with 2022 (53%).
- 1.14. As has historically been the case, the largest businesses (250+ employees) were most likely to have contacted their retailer (33%), compared to just 19% of those with 1-10 employees and 18% with 11-50 employees.



## 2. Methodology

### Research objectives

The objectives for the 2024 survey are consistent with the previous three iterations of the survey (conducted in 2018, 2020/21, and 2022); seeking to measure and understand business customers' satisfaction with the services they receive. In addition, this report covers the following additional objectives:

- Measure and track significant differences in perception between different groups of customers, including:
  - those in England and Wales
  - by water and sewerage company (WaSC) regions
  - by retail provider
  - by business sector
  - by business size (determined by number of employees)
- Understand customer awareness and experience of the retail market, including:
  - Actions taken to date and associated experiences from those actions
  - Future intentions around switching or renegotiating existing contracts
- Identify water saving action taken by businesses, and where further support can / could be offered
- Understand customer contact experiences

### Approach

In total, 2,000 interviews were conducted with business customers between 16<sup>th</sup> March and 27<sup>th</sup> July 2024. The survey was conducted using a Computer Assisted Telephone Interviewing (CATI) approach. An initial pilot was conducted with 48 businesses in order to ensure the average questionnaire length was in line with expectations (no more than 15 minutes), and to test the effectiveness of new and modified questions compared to the previous survey in 2020/21. Following the review of pilot data, no further amends to the questionnaire were required<sup>2</sup>.

### Sampling

The sample consisted of businesses, charities and public sector organisations in England and Wales. Sample was purchased from Datascope, a commercial provider of business data and contacts. The sample included details of the businesses sector, number of employees, turnover and location. Fields were also included to give an indication of whether the business was a single or multi-site organisation. Businesses without a dedicated business premises (e.g. those who operate solely from home) were not included in the sample, and an additional question was included in the questionnaire screening section to ensure only those who receive a water bill for a business premises / operation were included in the research.

Within each WaSC region, quotas were set on business size (determined by number of employees) and sector to ensure a representative sample of businesses within each region.

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<sup>2</sup> See questionnaire appendix





## Screening

As well as profiling businesses from the sample, screening questions were included to ensure only eligible businesses were included. To be eligible for interview, businesses must be directly billed for a commercial water supply, meaning that businesses who operate from a domestic premises, or businesses that work from a building where a commercial landlord pays for water and other utility services are not included.

Questions were also asked on business size, sector, and location to ensure eligibility, and customer responses to these questions are used as the definitions of the sub-groups included for analysis in this report.

Where businesses operate from multiple sites, respondents are asked to answer based on the site that they are based at only.

## Questionnaire

The questionnaire was reviewed ahead of the launch of the pilot to reflect changing priorities and objectives following the previous iteration in 2022. In the main, the changes focused on streamlining the 2020/21 survey to remove questions that were no longer a focus or priority. An example of this being questions related to support and contact from retailers during and after Covid restrictions on business operations.

The only fundamental change in the questionnaire related to data presented in this report about trust. Previously, questions related to trust in a supplier or provider were asked on a 10pt scale, this was updated in 2024 to be a 5pt scale in order to align with satisfaction questions. Analysis of trust related perceptions are provided in this report, but should be treated with caution as a result of the updated scale. For comparative purposes, ratings of 8-10 (high levels of trust) in previous surveys are compared with ratings of 4-5 (top2box) in the 2024 survey.

## Weighting

To ensure that the sample profile matches the profile of businesses within England and Wales, data were weighted on size (by number of employees) and sector. In each case, interviews achieved against the quotas matched the actual profile of businesses well, so only slight corrective weights were required.

For **sector**, at an overall level the achieved sample matched quotas well in terms of sector so no weighting was required or applied.

For **size**, a slight corrective weight was applied to account for the difference in size profile between businesses in England vs. Wales. In Wales, a boost sample is included to allow for robust data comparisons between England and Wales at a total level. The size of businesses in Wales is smaller (on average) than those in England, so it was necessary to apply the weight to account for this profile difference.

The overall weighting efficiency across sector and size is 83.7%. Weighting efficiency runs from 0% to 100%, with 100% meaning that the sample matched the population completely. Weighting efficiency values above 70% mean that weighting is fit for purpose (i.e. the weighting isn't so extreme that it distorts the validity and reliability of the data collected). As such, the efficiency achieved is very high and well above the cut off for being fit for purpose.

A second weight was also applied to the data to correct for the oversample of interviews achieved vs. the business population size in certain areas (notably, Wales and the South West / Wessex regions). Oversampling vs. the number of businesses in a particular area is done to allow for robust comparisons of data between areas (England vs. Wales, and at a WaSC vs. WaSC level).





The weight ensures that at a total level, the proportion of interviews in each region is relative to the number of businesses in each region.

## Interpreting the data

A quota sampling approach was applied to the research to ensure that the sample achieved was broadly representative of the business populations of England and Wales by size, sector and region – with weighting applied (as described above) to match back to the overall population following the conclusion of fieldwork. Respondents for the fieldwork were recruited from telephone lists provided by Datascope (a commercial provider of business information and contact data).

A quota sampling approach is used to gather a broad-brush picture of business' attitudes, perceptions and opinions; however, as we use this approach rather than a random probability sample, we should not strictly generalise about the entire population sampled from.

Quota sampling will always be skewed towards businesses / respondents willing to take part in the research, as a result all data are subject to sampling tolerances – meaning that not all differences between groups for comparison are statistically significant. Throughout the report significant differences (at a 95% confidence interval) are shown.

Significance testing is conducted using the effective sample size to take into account weighting effects where they are applied. Differences that are not shown as statistically significant are indicative / directional only, and are noted as such. In the commentary attached to charts and figures, only statistically different differences are noted.

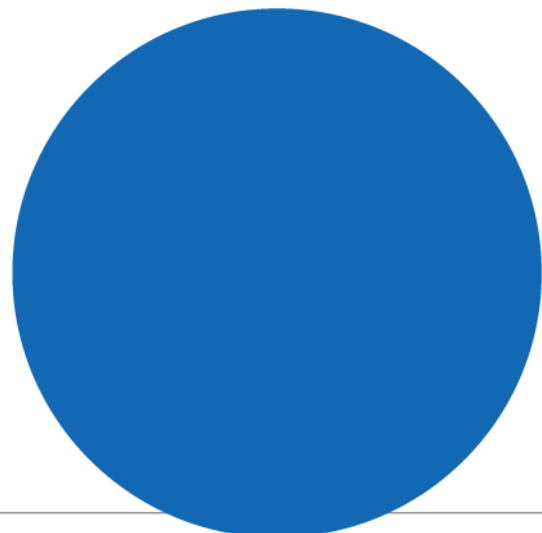
Where percentages do not equal 100, this may be due to rounding, or will be attached to a question where respondents were able to select multiple answer options.

Data with low base sizes (<50) are marked with an asterisk (\*), and data with very low base sizes (<30) is marked with a double asterisk (\*\*).



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## 3. Data report





# 3. Data report

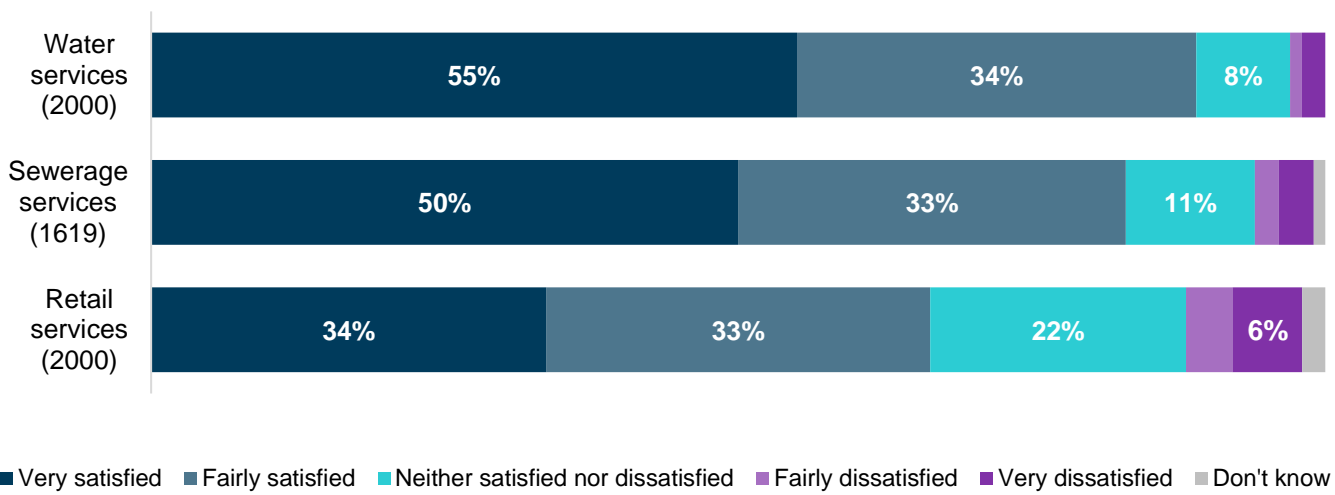
## 3.1. Satisfaction with water, sewerage and retail services

This chapter covers business customer satisfaction with water services, sewerage services, and retail services.

Below each table, commentary is provided on any significant sub-group differences, including any differences with the 2018, 2020/21 and 2022 surveys.

Overall, we see that satisfaction with water, sewerage and retail services in 2024 is broadly in line with the 2022 survey. In light of the increased media focus on water (and to a lesser extent retail) companies over the past couple of years, and when looking at similar satisfaction surveys carried out in a household consumer context, there was a prior expectation that satisfaction among business customers may well be lower than previously recorded. That this isn't observed suggests there may be other factors, beyond media coverage, in play for business customer satisfaction that combine to maintain customer satisfaction levels. This element of the narrative behind the data is covered throughout this report.

**Figure 1: Satisfaction with water, sewerage and retail services in 2024**



Note: data labels <5% not shown



## **Significant differences compared to previous surveys**

- Satisfaction has remained largely stable, with satisfaction with water supply sitting at 89% (88% in 2022), satisfaction with sewerage services at 83% (82% in 2022) and satisfaction with retailer services at 67% (70% in 2022).
- Mean satisfaction scores are also stable, suggesting that there has been little shift in perceptions since 2022.

### **Significant differences at a sub-group level: water services**

- As has historically been the case, satisfaction with water services is significantly higher in Wales than in England (94% cf. 87%).
- There are no significant differences in satisfaction by business size.
- Four water supplier areas have satisfaction in excess of 90% (Hafren Dyfrdwy\*, 96%; Dwr Cymru, 94%; Northumbrian Water, 93%, and; Wessex Water, 91%). The lowest levels of satisfaction are with South West Water and Southern Water (both 84%).
- Businesses in England who are aware of the retail market are significantly more likely to be satisfied than those who are not aware of the retail market (89% cf. 85%).

### **Significant differences at a sub-group level: sewerage services**

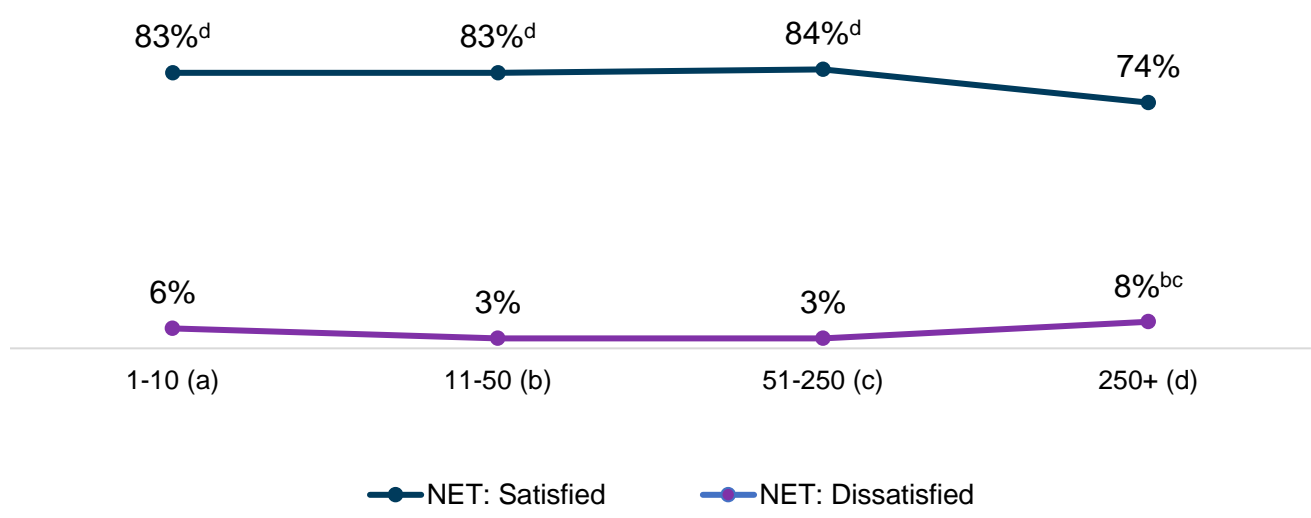
- Satisfaction with sewerage services is significantly higher in Wales than in England (88% cf. 82%).
- The largest businesses (250+ employees) are less likely to be satisfied with their sewerage services (74% - and down 8% from 82% in 2022) than smaller businesses (1-10 & 11-50 employees, both 83%; 51-250 employees, 84%) – see figure two below.

### **Significant differences at a sub-group level: retail services**

- Satisfaction with retail services is significantly higher in Wales than in England (84% cf. 63%).
- There are no significant differences in satisfaction by business size.



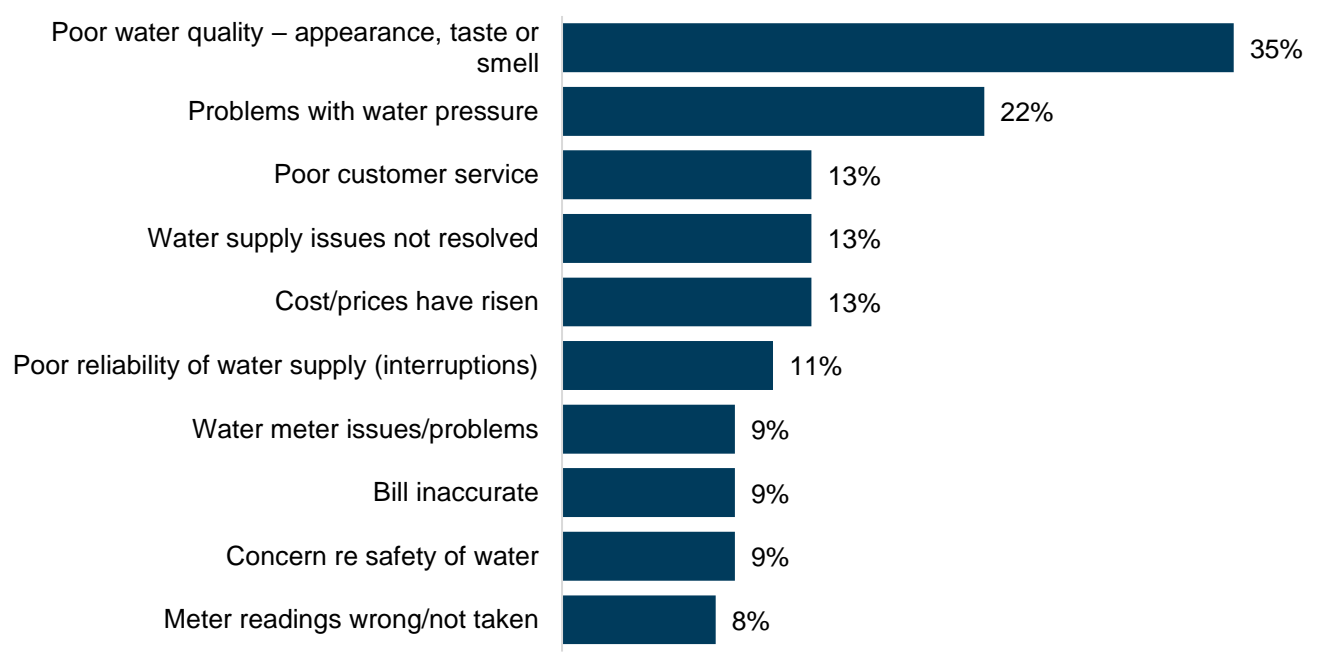
**Figure 2: Satisfaction with sewerage services by business size, 2024**



**Significant differences at a sub-group level: sewerage services**

- Satisfaction with sewerage services is lower among larger businesses (250+ employees) than other business sizes. However, still less than one in 10 of the largest businesses are dissatisfied (8%) with their sewerage services. See figure 4 below for (overall) reasons for dissatisfaction

**Figure 3: Reasons for dissatisfaction with water services, 2024 (n=60)**

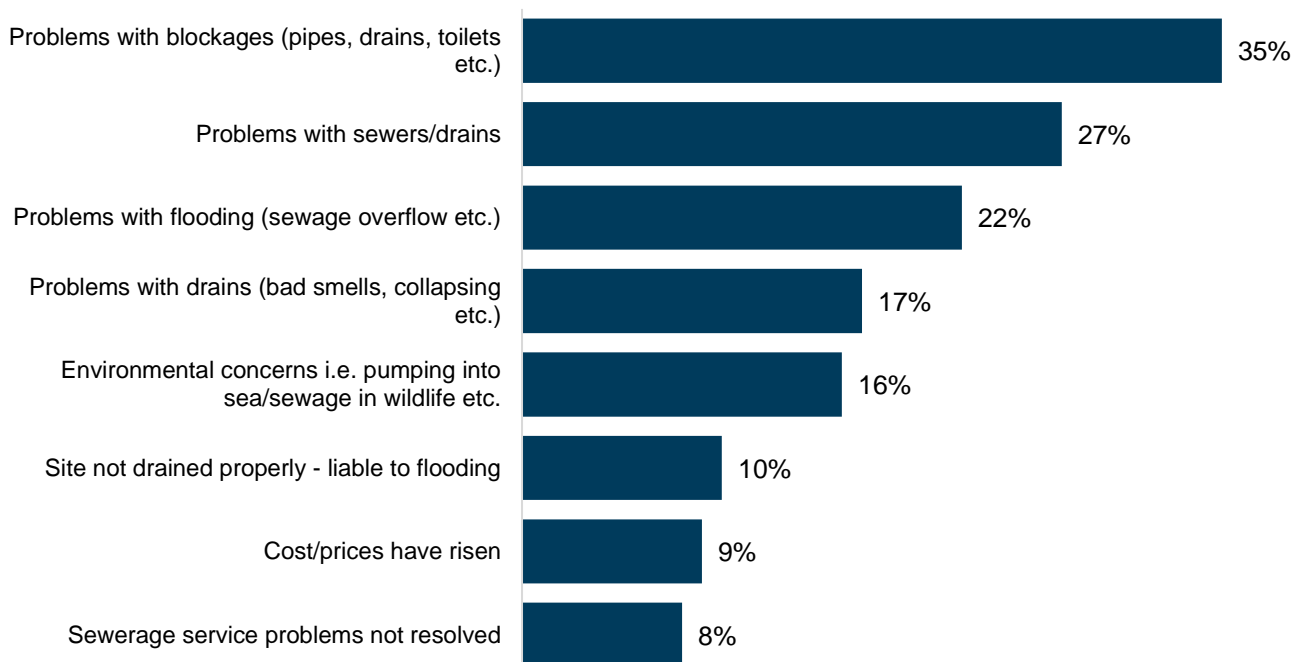


Note: Only reasons above 5% shown



- Mentions of poor water quality (35%) are lower than in 2022 (44%)
- Mentions of poor customer service (13%) – a reason that should typically be attributed to retailer service – have increased in 2024 (7% in 2022)
- Other issues that should typically be attributed to retailer service (water meter issues, inaccurate bills & meter readings being wrong or not taken at all) continue to be (perceived) factors in 2024 at similar levels to 2022.

**Figure 4: Reasons for dissatisfaction with sewerage services, 2024 (n=81)**

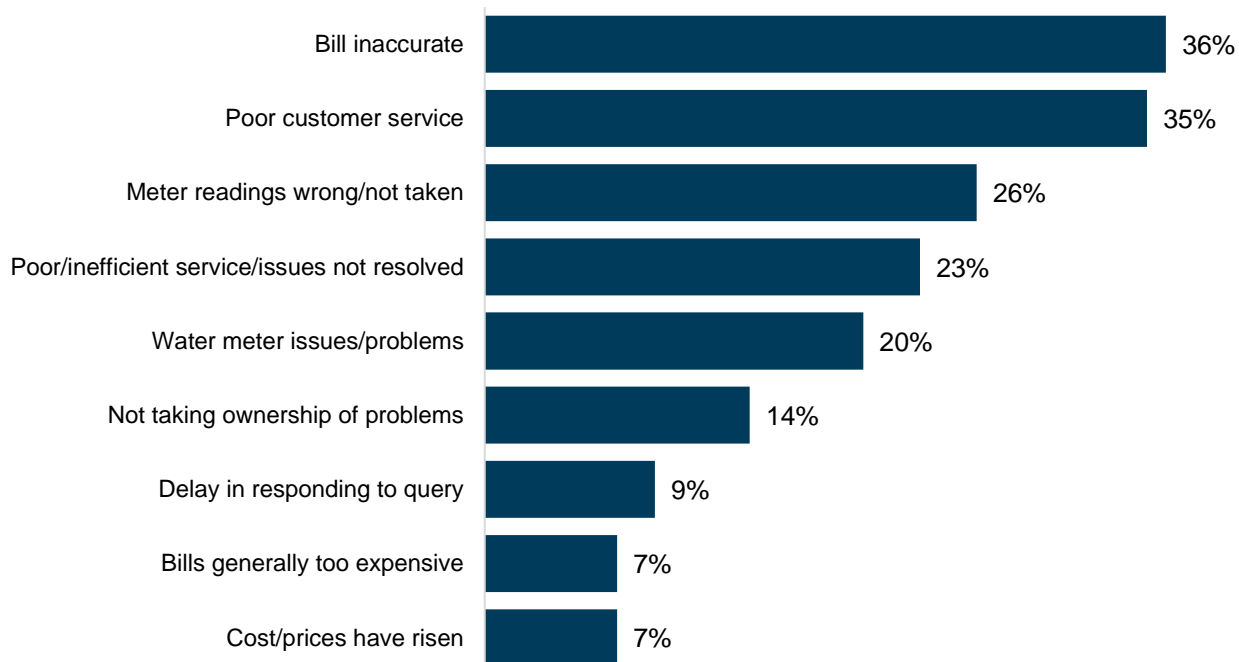


Note: Only reasons above 7% shown

- Mentions of environmental concerns have increased to 16% in 2024, up from 7% in 2022.
- Elsewhere, reasons for dissatisfaction are broadly in line with 2021/22.



**Figure 5: Reasons for dissatisfaction with retail services, 2024 (n=198)**



Note: Only reasons above 5% shown

- Mentions of poor customer service have fallen by 9% (35% down from 44% in 2022) since the previous survey
- However, mentions of inaccurate billing (36%) have increased by 8% (28% in 2022)
- For the first time, there have been mentions (5%) of issues following a switch – although this still represents a very small minority of the total



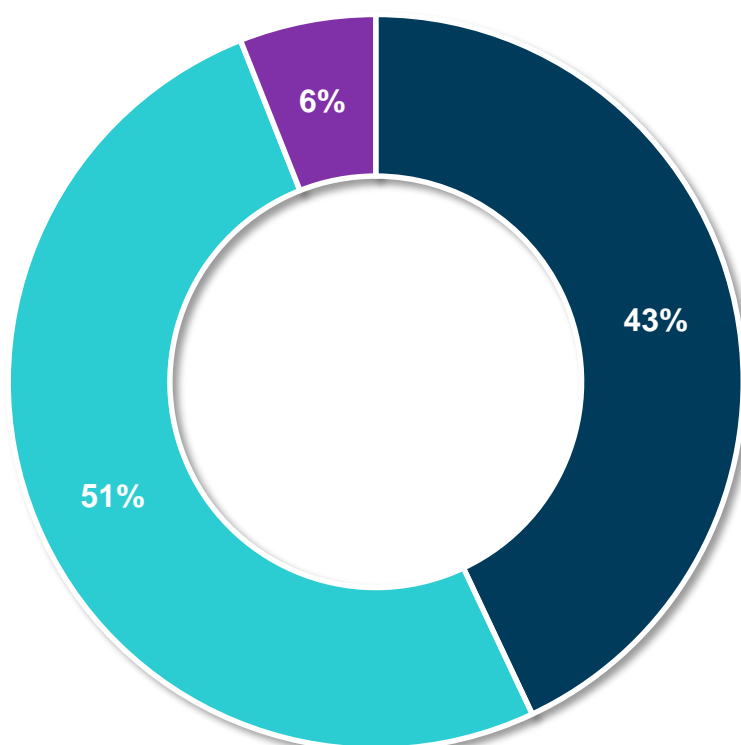


## 3.2. Water saving activity

This chapter covers business customers' action in relation to water saving activity.

There has been an increase in businesses engaging in some form of water activity since 2022 (43% up from 39% in 2022), however, the type of water saving activity undertaken and the barriers for not engaging in this activity among those with no known water saving actions remain largely unchanged.

**Figure 6: Water saving activity by businesses, all businesses 2024**



- Engaged in water saving activity
- Not engaged in water saving activity
- Don't know

### Significant differences compared to previous surveys

- Across all businesses, 43% have engaged in some form of water saving activity, up from 39% in 2022 (a significant increase).

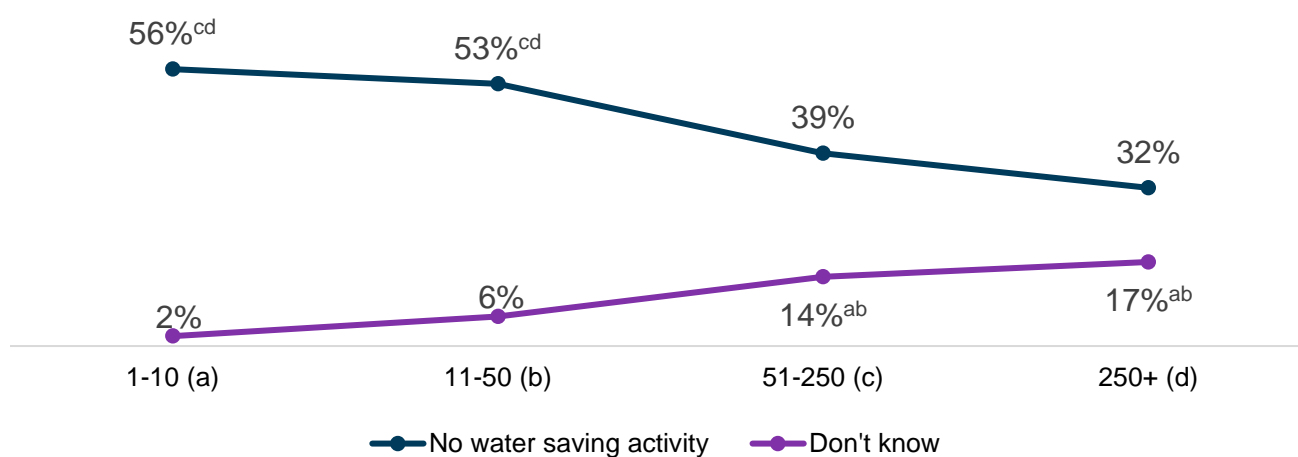
### Significant differences at a sub-group level

- There is no significant difference in water saving activity undertaken between businesses in England (43%) and Wales (46%).
- There is a notable difference between smaller businesses (1-10 and 11-50 employees) compared to larger businesses (51-250 and 250+ employees), with smaller businesses more likely to say they have not engaged in any water saving activity, and larger businesses more likely to not know whether any water saving activity has / is taking place (see figure 7 below).



- Of businesses in England aware of the retail market, 46% are engaging in water saving activity, compared to 39% of businesses who are unaware:
  - Of businesses aware of the retail market and have switched retail service provider, 12% have been offered a water efficiency service / audit;
  - Of businesses aware of the retail market and have renegotiated their contract, 14% have been offered a water efficiency service / audit.

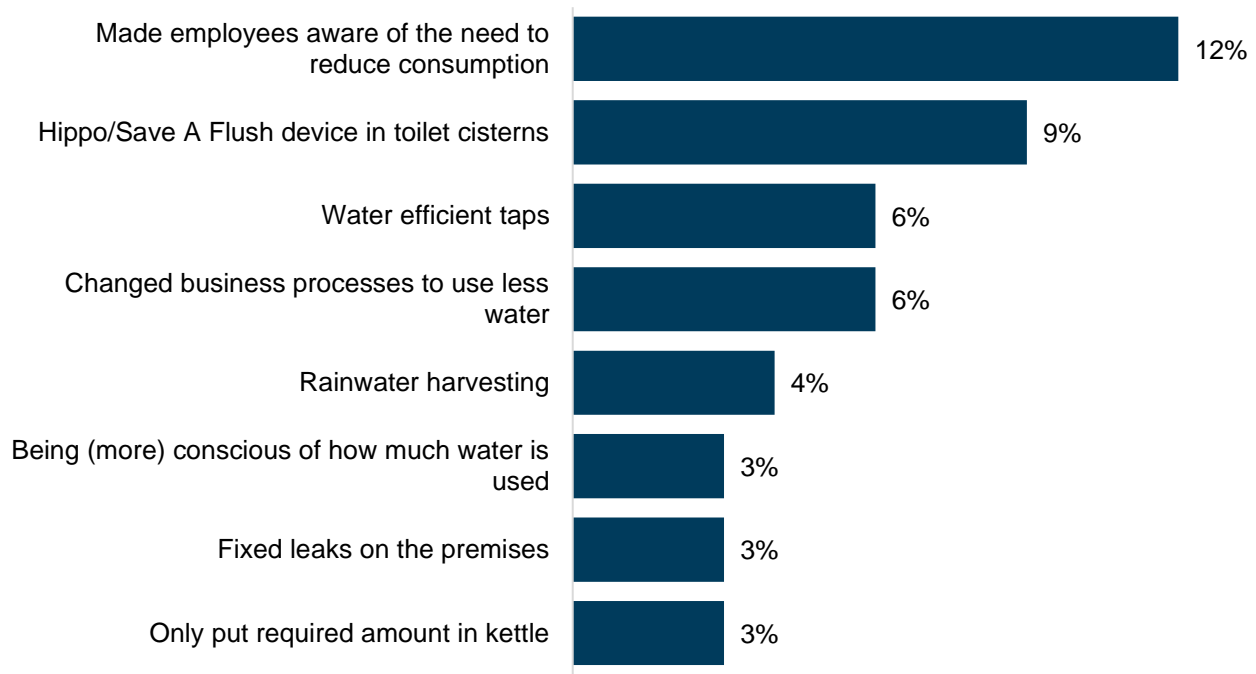
**Figure 7: No water saving activity by business size, 2024**



- Smaller businesses (up to 50 employees) are significantly more likely to be undertaking no water saving activity compared with larger businesses (more than 50 employees).
- However, larger businesses are significantly more likely to report that they do not know what actions, if any, their business has taken to reduce water usage.



**Figure 8: Water saving activities undertaken, 2024**

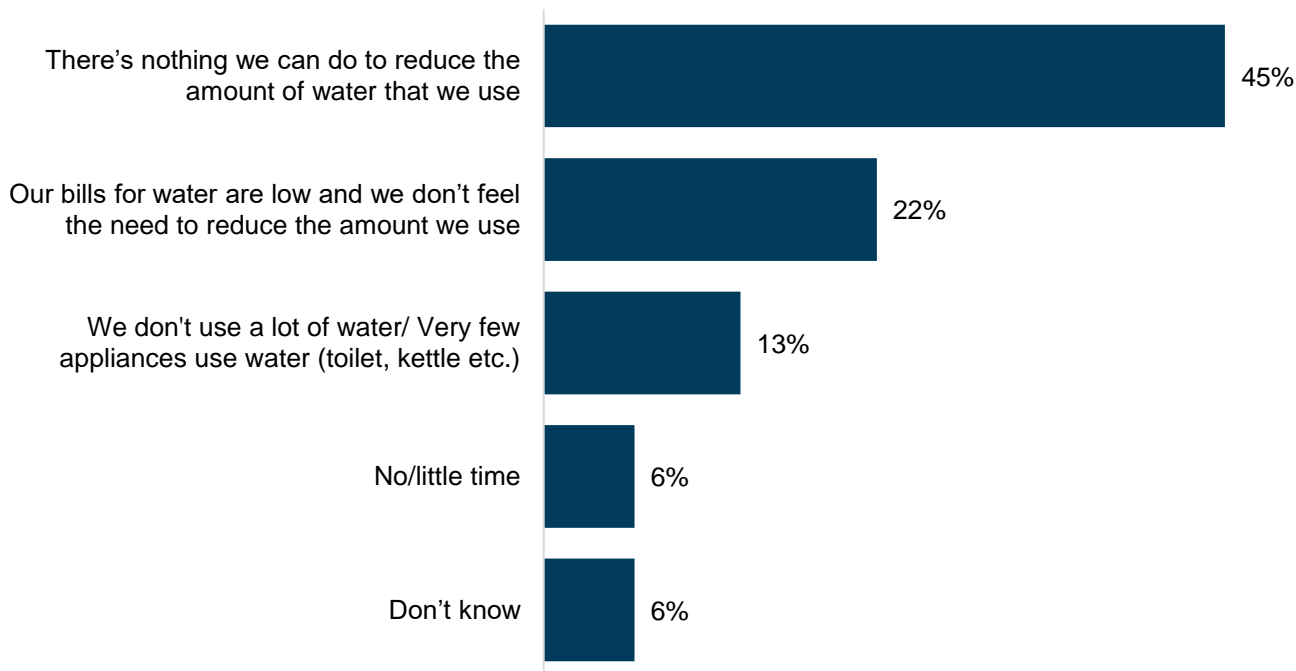


Note: Only reasons above 3% shown

- The types of water saving activity undertaken across businesses is unchanged from 2022.
- There is no significant difference in the types of water saving activity undertaken by business customers in England compared to Wales.
- Similarly, there are no significant differences in water saving activity undertaken by business size.



**Figure 9: Barriers to water saving activity, 2024**

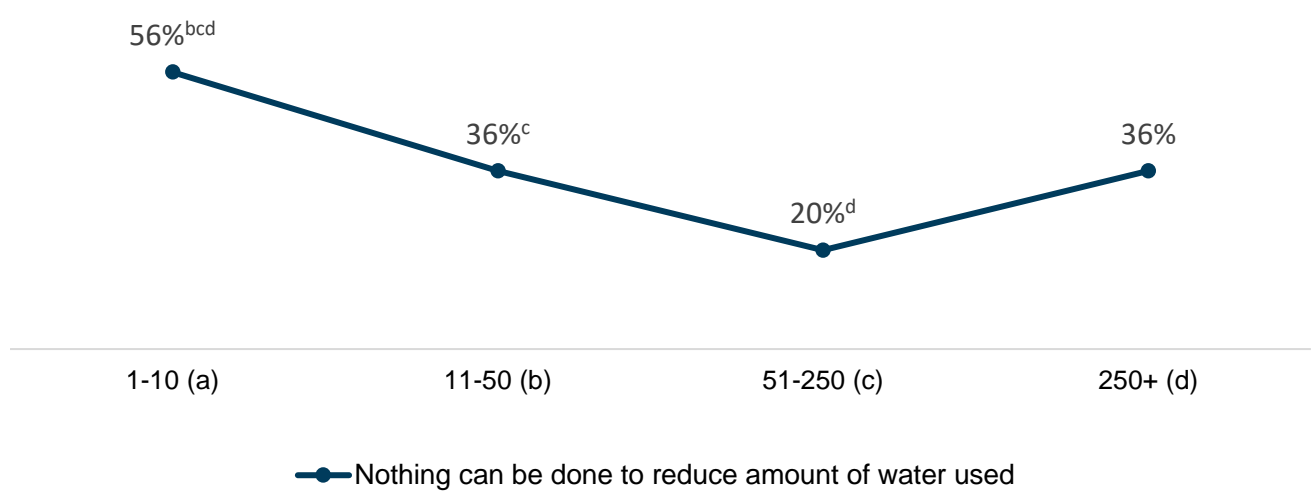


Note: Only reasons above 5% shown

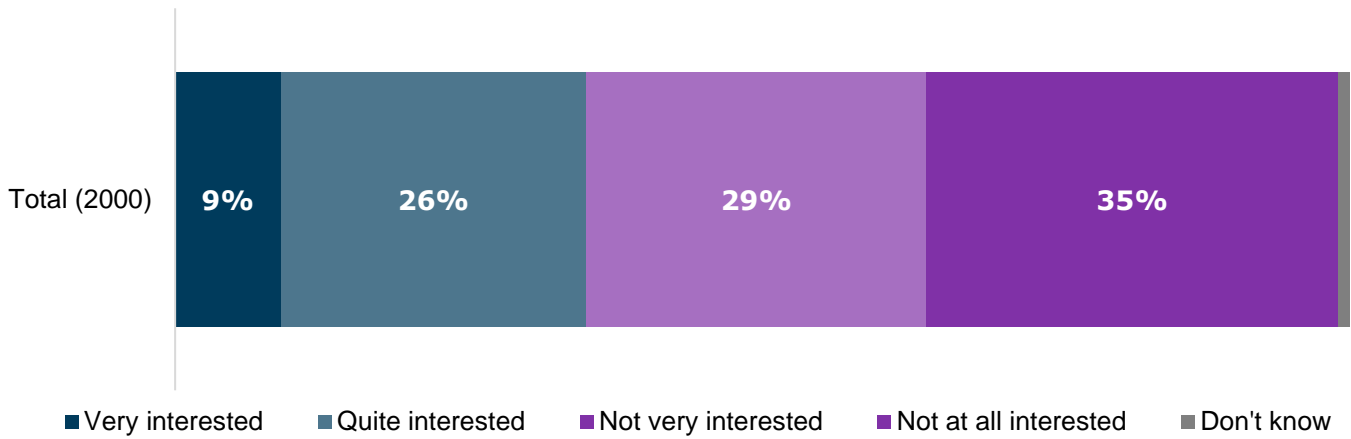
- Smaller businesses (1-10) are significantly more likely to believe there is nothing they can do to reduce their water usage than larger businesses (51-250) (56% cf. 20%). See figure 10 below.
- Additionally, smaller businesses (1-10) are also significantly more likely to report that their water bills are already low and they don't feel the need to reduce them (26%) than the largest businesses (0%).



**Figure 10: Barriers to water saving activity by business size, 2024**



**Figure 11: Interest in learning how to make water savings for business**



Note: Data labels <5% not shown

- There is no difference in interest between businesses in England and Wales
- Just a quarter (24%) of businesses with 1-10 employees would be interested in this service, compared to: 11-50, 41%; 51-250, 52%; and, 250+, 57%
- Just 27% of those who have not taken any water saving action would be interested in this service, compared to 42% of those who have taken action

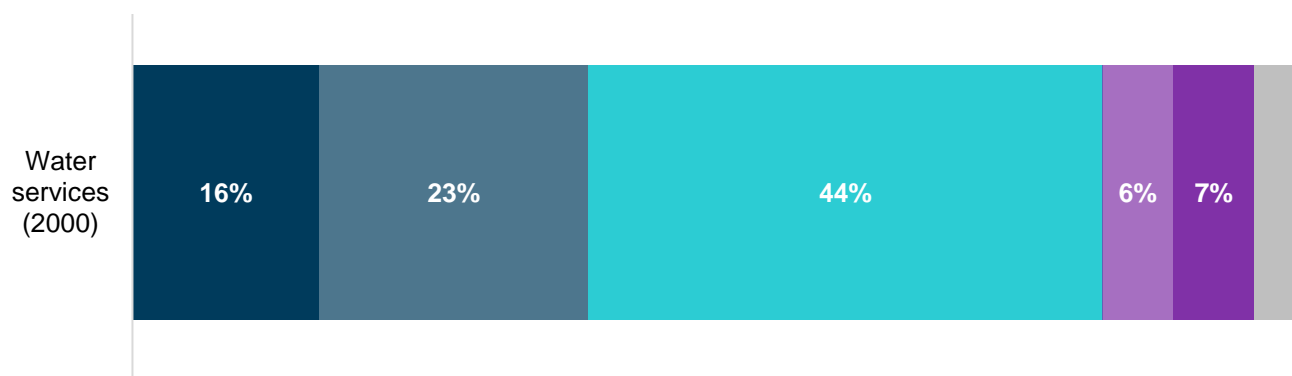


### 3.3. Caring for customers

This chapter covers business customer perceptions of the extent to which water service providers<sup>3</sup> care about the service they give.

While satisfaction with the various elements of water provision have remained stable in 2024 compared to 2022, business customers are now significantly less likely to believe their water service provider cares about the service they provide to customers.

**Figure 12: Care for customers, water and retail services, 2024**



■ Strongly agree ■ Slightly agree ■ Neither agree nor disagree ■ Slightly disagree ■ Strongly disagree ■ Don't know

Note: data labels <5% not shown

#### Significant differences compared to previous surveys

- 39% agree their water company cares about the service it gives to customers, down 7% from 2022 (46%).

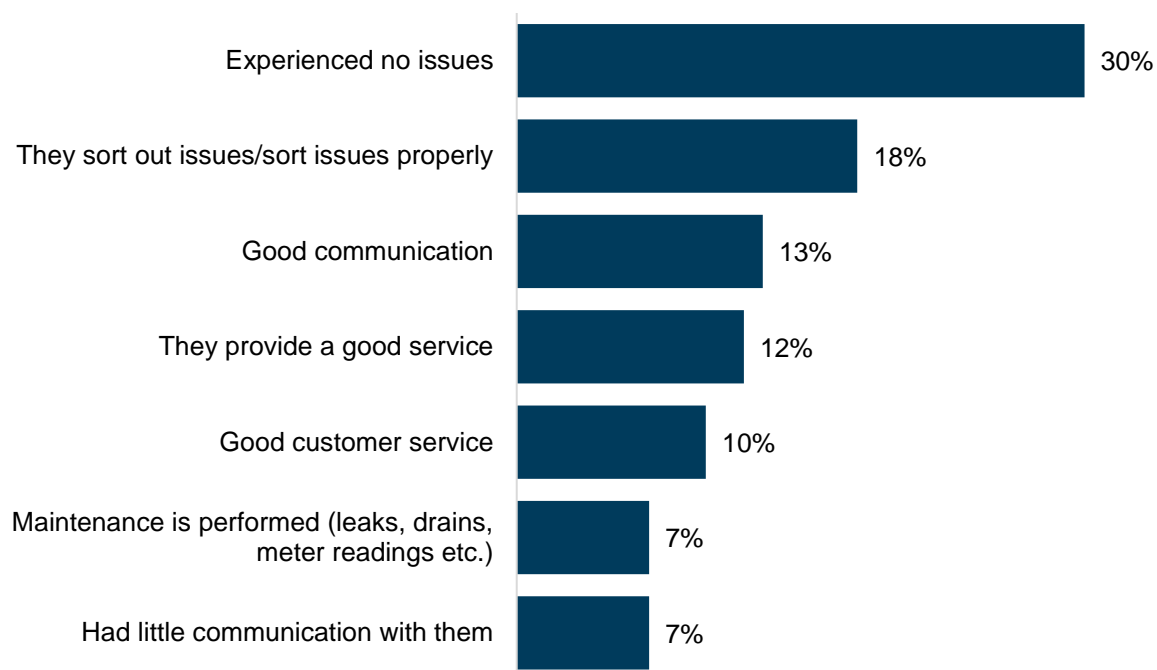
#### Significant differences by sub-group

- Business customers in Wales are significantly more likely to agree their water company cares about the service it provides to customers than those in England (56% cf. 35%)
- Business customers in England who are aware of the retail market are more likely to agree than those who are not aware (37% cf. 32%)
- Those who have contacted their water company with an enquiry are more likely to agree than those who have not had enquiry contact (48% cf. 39%)

<sup>3</sup> The question about care in relation to retail service provision removed from the 2024 survey



**Figure 13: Reasons why customers agree their water provider cares about the service it gives to customers (n=778)**



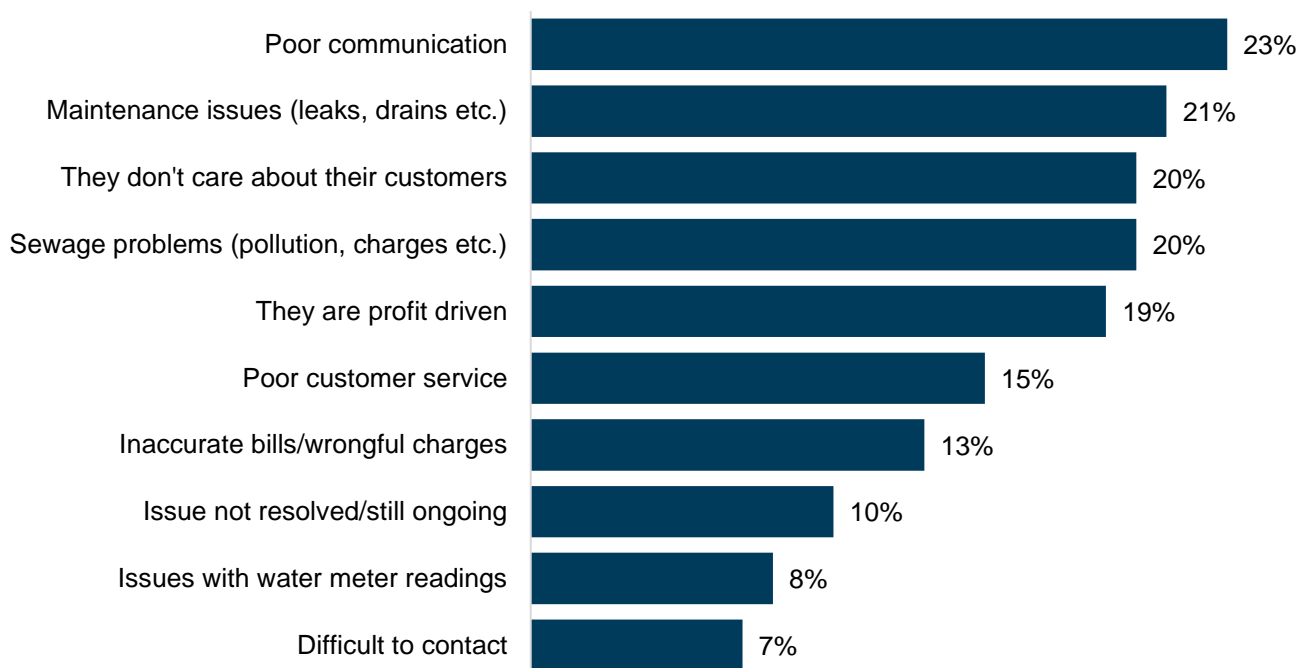
Note: Only reasons above 6% shown

- Businesses in Wales are significantly more likely to agree that their water company cares about the service it gives to customers on the basis of good communication (19%) than businesses in England (10%).
- The largest businesses (250+ employees) are significantly more likely to cite good customer service (19%) as a reason for agreement than businesses with 11-50 employees (7%).





**Figure 14: Reasons why customers disagree their water provider cares about the service it gives to customers (n=268)**



Note: Only reasons above 6% shown

- There are no significant differences in reasons for disagreement between businesses in England and Wales.
- Issues with meter readings are cited as a reason for disagreement more frequently among larger businesses (51 or more employees\*) than smaller businesses (less than 50 employees), 15% cf. 6%

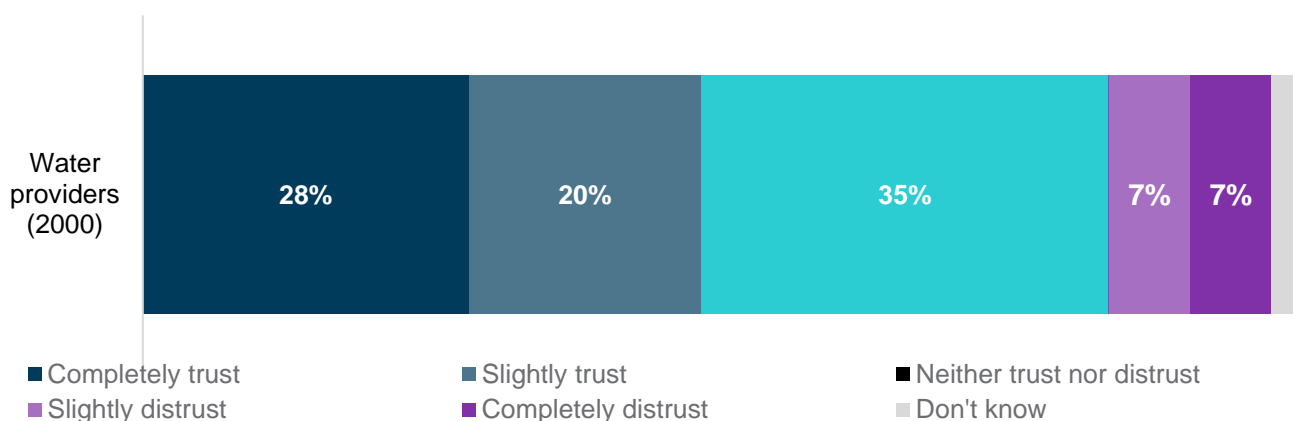


### 3.4. Trust

This chapter covers business customers' trust in their water provider.

As with customer care, perceptions of trust have declined in 2024 compared to the previous survey in 2022. However, the question scale has been updated in 2024 to a 5 point scale from a 10 point scale used in previous iterations. Data comparisons are made between high levels of trust (ratings of 8-10) in previous surveys and top2box (completely trust & slightly trust) scores in 2024. Data comparisons should be treated as indicative and with a degree of caution.

**Figure 15: Trust in water providers, 2024**



Note: data labels <5% not shown

#### Significant differences compared to previous surveys

- In 2022, 55% of business customers provided a rating of 8-10 out of 10 for the extent to which they trusted their water service provider, this has fallen to 49% in 2024 where 28% say they completely trust their water provider and 20% that they slightly trust them.

#### Significant differences by sub-group

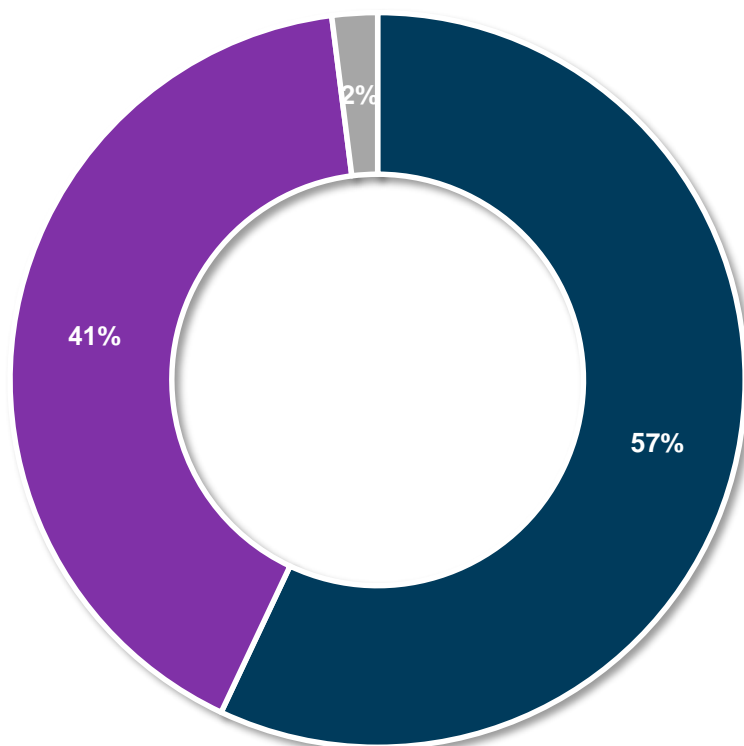
- Customers in Wales are significantly more likely to trust their water provider than customers in England (65% cf. 45%)
- There are no significant differences in trust across different business sizes
- Trust is lowest among customers of Southern Water (32%); South West Water (34%) and Thames Water (34%) – all significantly below the overall level of trust (49%)



### 3.5. Awareness of the retail market in England, and the ability to switch in Wales

This chapter covers awareness of the retail market in England, and the ability to switch providers in Wales.

**Figure 16: Awareness of retail market in England, 2024**



- Aware of ability to switch or renegotiate
- Not aware
- Don't know

#### Significant differences compared to previous surveys

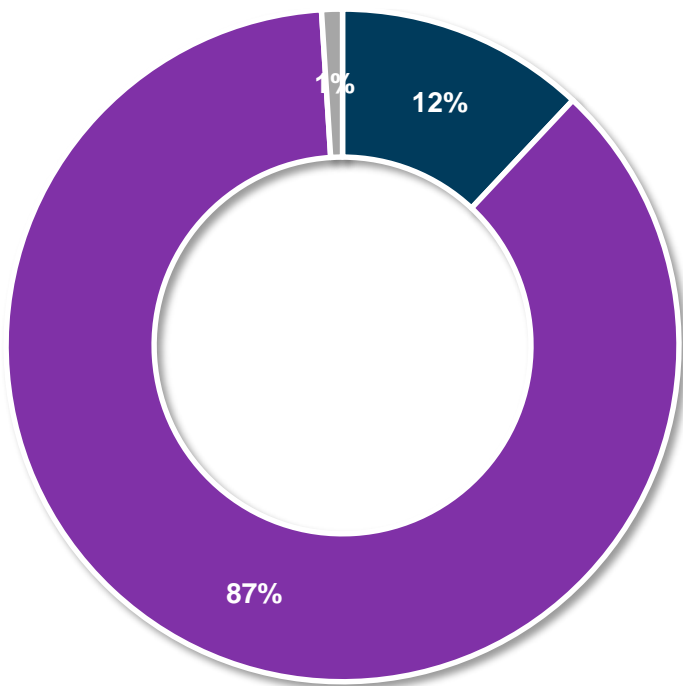
- Awareness of the retail market in England (57%) is consistent with 2022 (56% aware) – however, awareness compared to 2018 (in the 12 months after the opening of the retail market) is significantly higher (57% in 2022 cf. 43% in 2018).

#### Significant differences by sub-group

- Larger businesses (250+) are most likely to be aware of the retail market (76%).
- Typically, service-based businesses are less likely to be aware of the retail market in England than product-based business. For example, 68% of those in the manufacturing sector report that they are aware of the retail market, compared with 50% of those in financial and insurance activities.



Figure 17: Awareness of retail market regulations in Wales, 2024

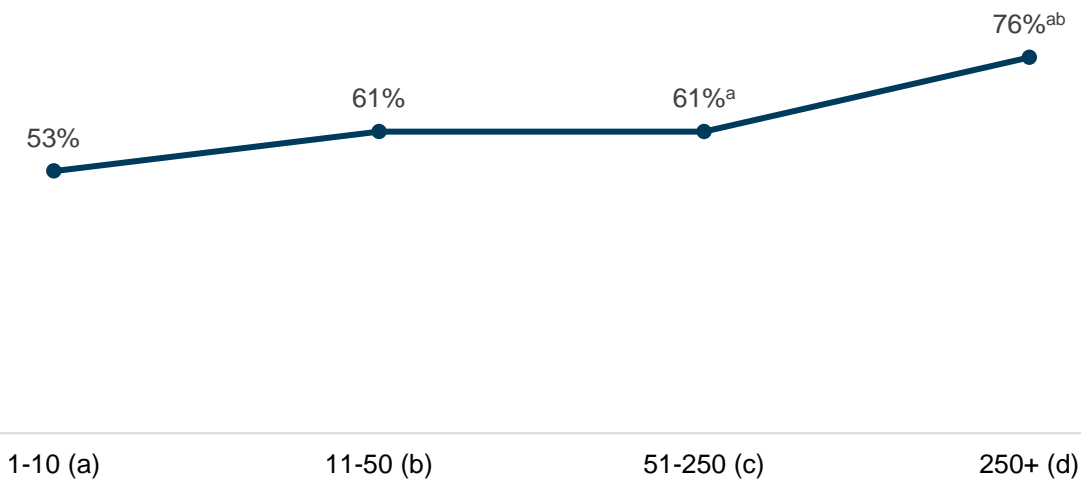


- Aware of Welsh retail market regulations
- Not aware
- Don't know

- Just 3% of businesses in Wales are aware of the Welsh Government's engagement on future legislative changes which could mean that in the future no business in Wales would be able to change their water retail provider, unless they had already switch retailer:
  - Of those 3%, 60%\*\* are satisfied with the proposals

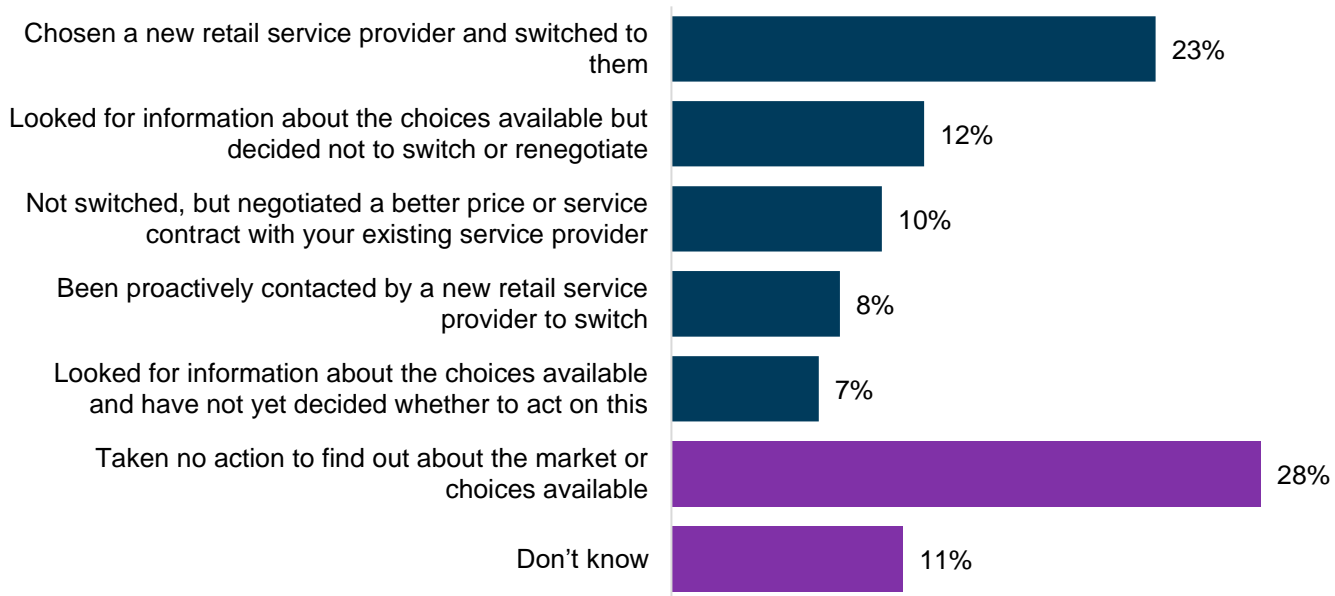


**Figure 18: Awareness of the retail market in England by business size, 2024**



- Larger businesses (250+) are significantly more likely than all other businesses to be aware of the retail market (76% cf. 53%, 61% and 61%).

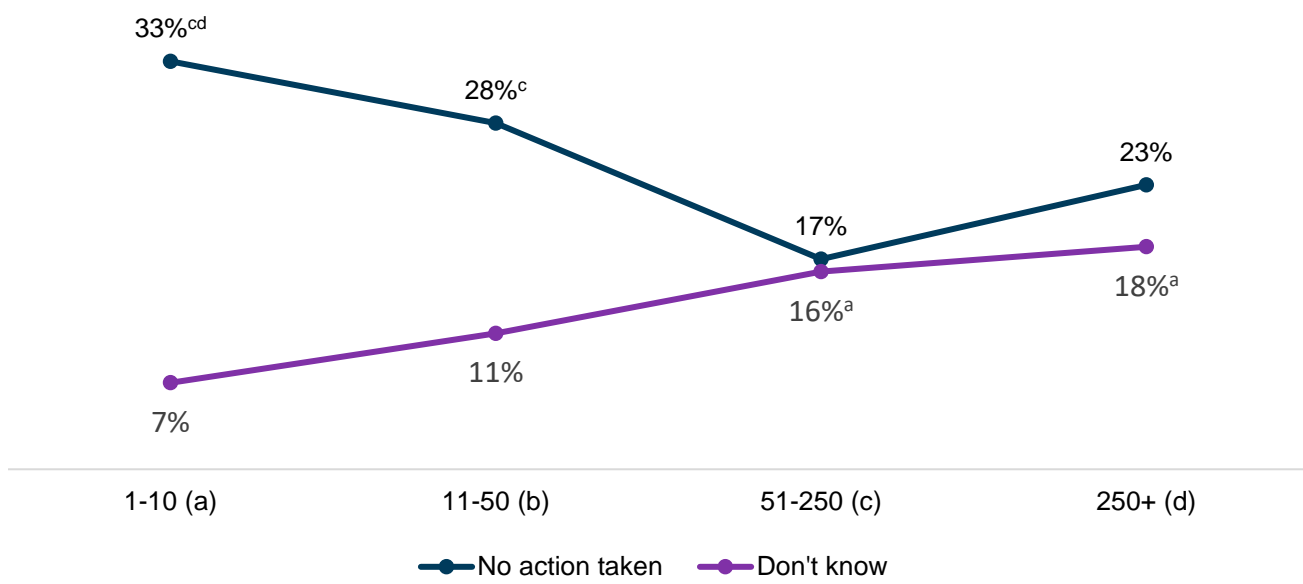
**Figure 19: Action taken in relation to switching or renegotiating 2024, England only**



- Customers with a single business premises are significantly more likely to take no action to find out about the market or choices available than those with multiple business premises (30% cf. 23%).
- Businesses with 250+ employees are significantly more likely to have chosen a new retail service provider and have switched to them than those with 11-50 employees.

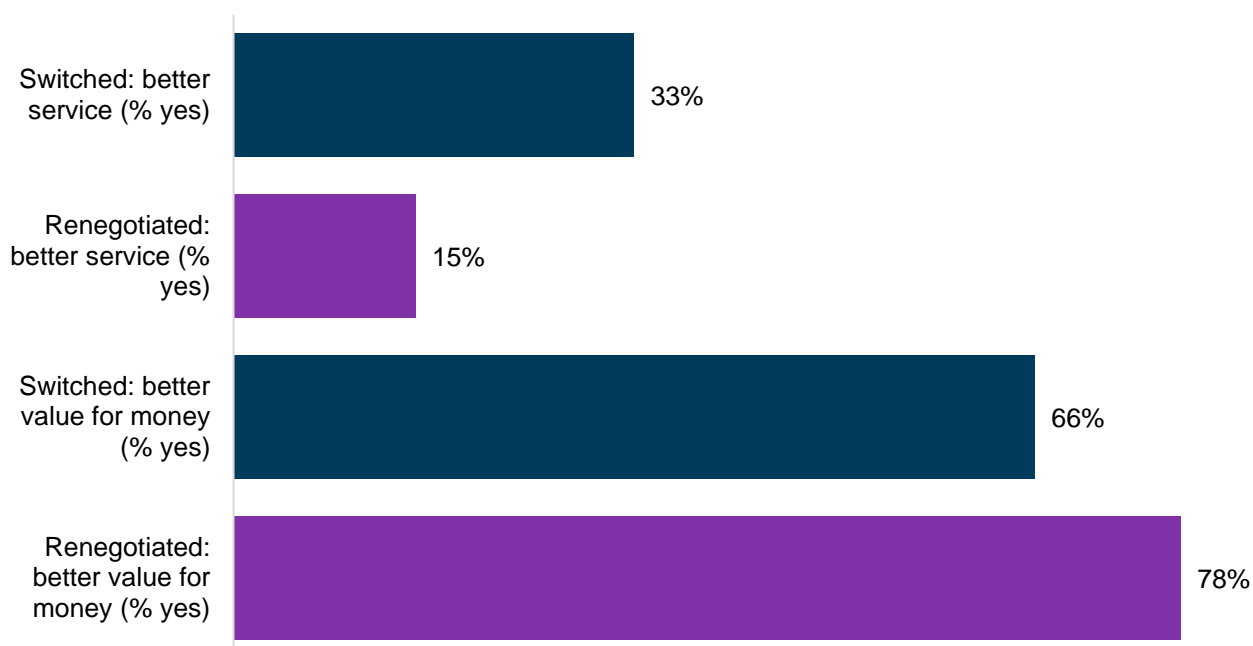


**Figure 20: No action in the retail market by number of employees, 2024**



- Customers with a single business premises are significantly more likely to have taken no action to find out about the market or choices available than those with multiple business premises (30% cf. 23%), however larger businesses are significantly more likely to not know whether any action has been taken, or not.

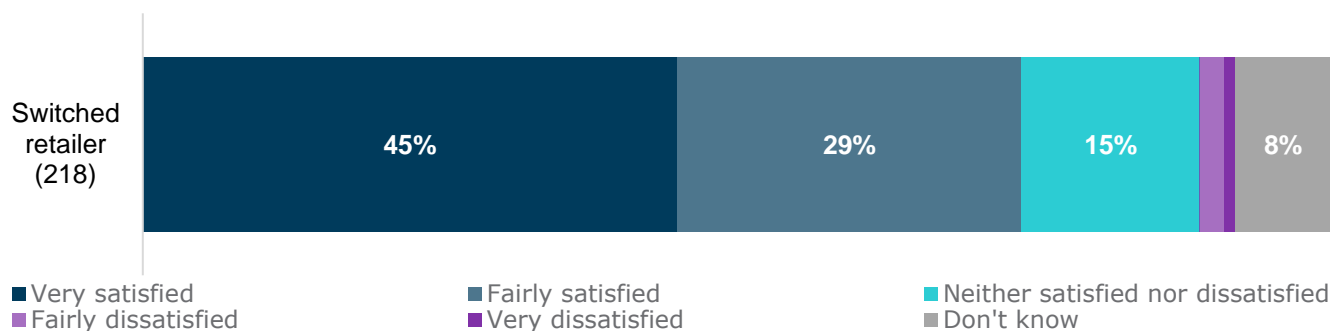
**Figure 21: Better service or value for money as a result of switching or renegotiating, 2024**





- In 2024, customers who have switched are more likely to say they have since received better service (33%) than in 2022 (22%), and they are also more likely to say they have received better value for money (66% 2024) than in 2022 (44%).
- Similarly, those who have renegotiated in 2024 are more likely to say they have since received better service (15%) than in 2022 (9%), and they are also more likely to say they have received better value for money (78% 2024) than in 2022 (73%).

**Figure 22: Satisfaction with the switching process, 2024**



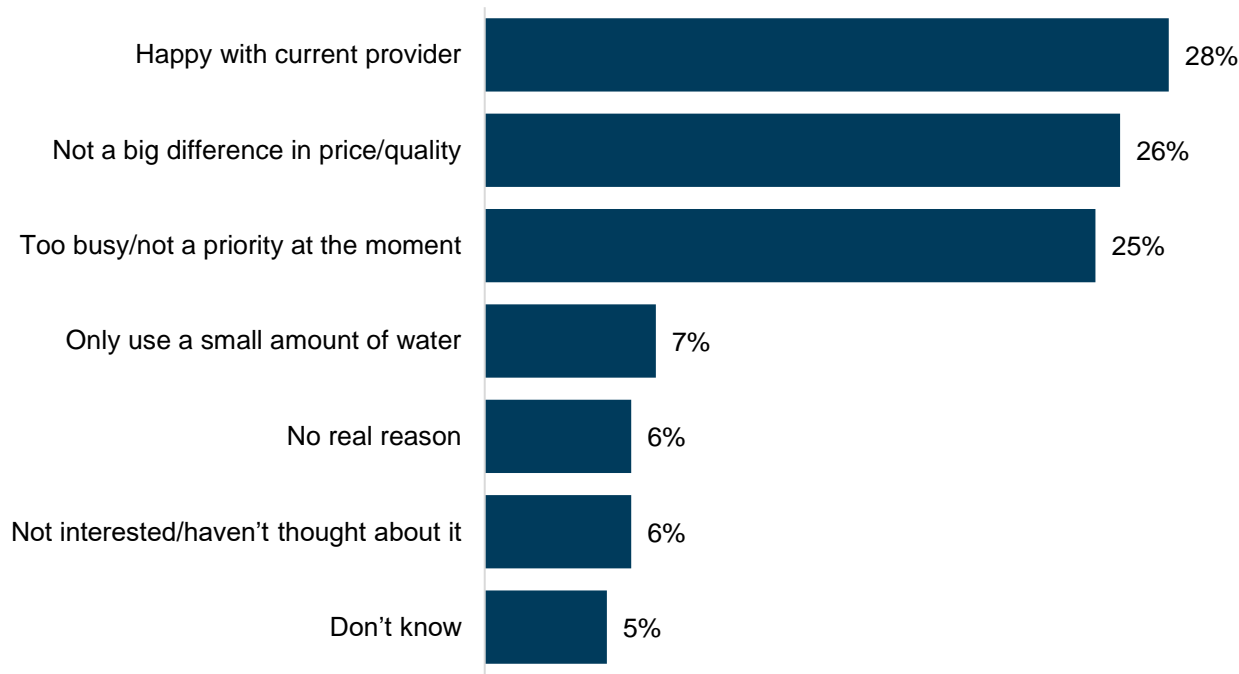
Note: data labels <5% not shown

- There is no significant difference in satisfaction with the switching process in 2024 (69% satisfied) than 2022 (68% satisfied).
- There are also no significant differences in satisfaction between businesses of different sizes.





**Figure 23: Reasons for not switching, 2024**



Note: Only reasons above 5% shown

- Businesses with 250+ employees are significantly more likely to report that they are happy with their current provider/don't want to switch than businesses with 51-250 employees (58% cf. 24%). Smaller businesses (1-10 & 11-50 employees) are more likely to cite being too busy and it not being a priority (32% and 35% respectively)

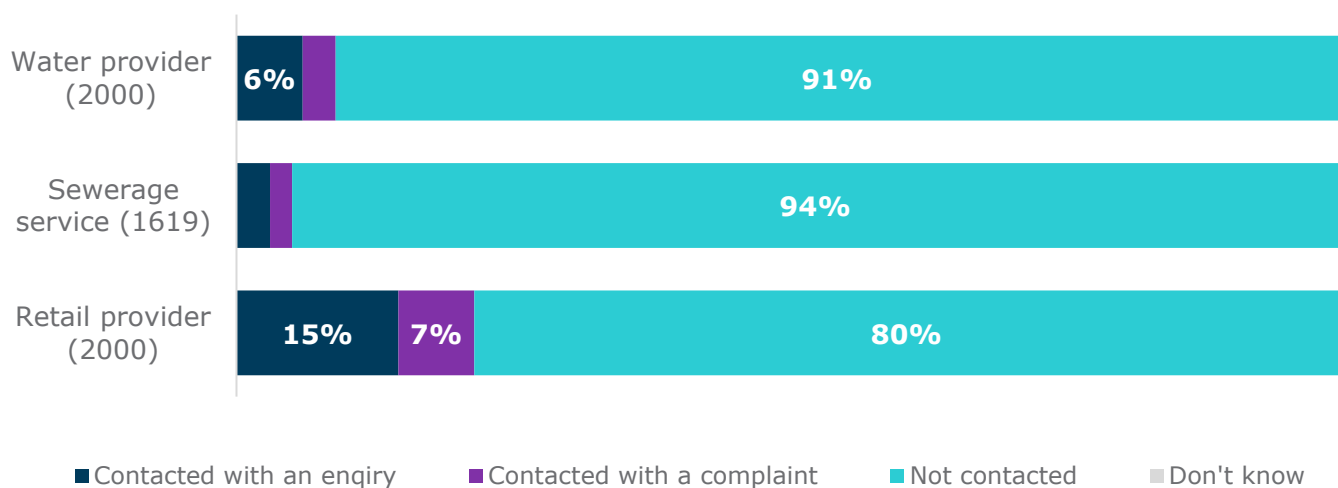


### 3.6. Contact with water, sewerage and retail providers

This chapter covers contact with water, sewerage and retail providers, including the type of contact, the reason for contact, and satisfaction with the contact outcomes.

Contact levels with different providers are broadly in line with 2022 levels.

**Figure 24: Business customer contact with water, sewerage and retail providers, 2024**



Note: data labels <5% not shown

#### Significant differences compared to previous surveys

- Contact volumes to retailers are in line with 2022 (17% contacted with an enquiry and 7% a complaint).
- Contact volumes to water and sewerage providers are also in line with 2022.



## Significant differences by sub-group

- Larger businesses (250+) are significantly more likely to have contacted their water supplier with an enquiry than smaller businesses (11-50) (13% cf. 4%).
- Similarly, larger businesses (250+) are significantly more likely to have contacted their retail supplier with an enquiry than smaller businesses (1-10) (27% cf. 12%).
- Businesses with 11-50 employees are significantly more likely to report they have not contacted their water supplier with an enquiry or complaint than businesses with 250+ employees (93% cf. 83%).
- As above, businesses with 11-50 employees are significantly more likely to report they have not contacted their retail provider with an enquiry or complaint than businesses with 250+ employees (83% cf. 71%).

**Table 1: Reasons for complaints with water, sewerage and retail providers, 2024**

### **Water services:** reasons for complaint (%)

Issues with leaks	<b>28%</b>
Lack of supply/ Water turns off constantly	<b>16%</b>
Poor water quality	<b>14%</b>
Lack of maintenance/ Not coming to fix issues in a timely manner	<b>8%</b>

### **Sewerage service:** reasons for complaint (%)

Sewage/drainage issue (e.g. blockages)	<b>86%</b>
--	------------

### **Retail services:** reasons for complaint (%)

Issue with bill (wrong amount, overcharging etc.)	<b>62%</b>
Poor customer service	<b>19%</b>
Incorrect metre reading	<b>17%</b>
Broken/missing water metre	<b>7%</b>
Flooding/ Leaks	<b>7%</b>

### **Satisfaction with the outcome of the complaint: water services**

- Overall, 35% were satisfied with the outcome of their complaint. 47% were dissatisfied.

### **Satisfaction with the outcome of the complaint: sewerage service**

- Overall, 20% were satisfied with the outcome of their complaint. 65% were dissatisfied.

### **Satisfaction with the outcome of the complaint: retail services**

- Overall, 36% were satisfied with the outcome of their complaint. 44% were dissatisfied.



**Table 2: Reasons for enquiry contacts with water, sewerage and retail providers, 2024**

<b>Water services: reasons for enquiry (%)</b>	
To report a leak	26%
A general billing enquiry	20%
Issue with water meter	11%
Water metre reading enquiries	8%
Sewage/drainage-related enquiries	8%
Loss of supply	7%
Water pressure	5%
Supply issue	4%
<b>Sewerage service: reasons for enquiry (%)</b>	
Sewerage problem	43%
Billing enquiry	22%
To report a leak	17%
Sewage/drainage enquiry	16%
Bill/account issue	4%
<b>Retail services: reasons for enquiry (%)</b>	
General billing enquiry	68%
Issue with water meter	10%
Water metre reading enquiries	10%
Bill/account issue	6%
To report a leak	4%
To change personal details	3%

**Satisfaction with the outcome of the enquiry: water services**

- Overall, 56% were satisfied with the outcome of their enquiry, and 28% were dissatisfied.

**Satisfaction with the outcome of the enquiry: sewerage service**

- Overall, 52% were satisfied with the outcome of their enquiry, and 36% were dissatisfied.

**Satisfaction with the outcome of the enquiry: retail services**

- Overall, 54% were satisfied with the outcome of their enquiry, and 32% were dissatisfied.



### 3.7. England vs. Wales

This chapter includes comparisons between England and Wales on key questions.

**Table 3: England vs. Wales, key question comparisons**

	England 2024 (a) <sup>4</sup>	Wales 2024 (b)
Q05: Overall satisfaction, <b>water services</b> (% satisfied)	87%	94% <sup>a</sup>
Q07: Action taken to reduce water usage (% taken action)	43%	46%
Q09: Overall satisfaction, <b>sewerage services</b> (% satisfied)	82%	88% <sup>a</sup>
Q12: <b>Water service</b> provider cares about the service it gives to customers (% agree)	35%	57% <sup>a</sup>
Q14: Trust in <b>water service</b> provider (% 9-10 out of 10)	45%	66% <sup>a</sup>
Q26: Overall satisfaction, <b>retail services</b> (% satisfied)	63%	84% <sup>a</sup>
Q32/1_1: Contacted <b>water services</b> provider with an enquiry	6%	6%
Q32/1_2: Contacted <b>water services</b> provider with a complaint	3%	3%
Q32/2_1: Contacted <b>sewerage service</b> provider with an enquiry	3%	4%
Q32/2_2: Contacted <b>sewerage service</b> provider with a complaint	2%	1%
Q32/3_1: Contacted <b>retail service</b> provider with an enquiry	16% <sup>b</sup>	12%
Q32/3_2: Contacted <b>retail service</b> provider with a complaint	8% <sup>b</sup>	2%

<sup>4</sup> a/b signifies significant differences at 95% confidence interval. If in column b there is an 'a' marker, it signifies that the value of the data in column b is significantly higher than column a



**Table 4: England 2024 vs. England 2022, key question comparisons**

	England 2024 (a)	England 2022 (b)
Q05: Overall satisfaction, <b>water services</b> (% satisfied)	87%	87%
Q07: Action taken to reduce water usage (% taken action)	43%	39%
Q09: Overall satisfaction, <b>sewerage services</b> (% satisfied)	82%	81%
Q12: <b>Water service</b> provider cares about the service it gives to customers (% agree)	35%	42% <sup>a</sup>
Q14: Trust in <b>water service</b> provider (% 9-10 out of 10)	45%	54% <sup>a</sup>
Q26: Overall satisfaction, <b>retail services</b> (% satisfied)	63%	66%
Q32/1_1: Contacted <b>water services</b> provider with an enquiry	6%	8%
Q32/1_2: Contacted <b>water services</b> provider with a complaint	3%	3%
Q32/2_1: Contacted <b>sewerage service</b> provider with an enquiry	3%	5%
Q32/2_2: Contacted <b>sewerage service</b> provider with a complaint	2%	2%
Q32/3_1: Contacted <b>retail service</b> provider with an enquiry	16%	19%
Q32/3_2: Contacted <b>retail service</b> provider with a complaint	8%	8%



**Table 5: Wales 2024 vs. Wales 2022, key question comparisons**

	Wales 2024 (a)	Wales 2022 (b)
Q05: Overall satisfaction, <b>water services</b> (% satisfied)	94%	92%
Q07: Action taken to reduce water usage (% taken action)	46% <sup>b</sup>	40%
Q09: Overall satisfaction, <b>sewerage services</b> (% satisfied)	88%	88%
Q12: <b>Water service</b> provider cares about the service it gives to customers (% agree)	57%	62% <sup>a</sup>
Q14: Trust in <b>water service</b> provider (% 9-10 out of 10)	66% <sup>b</sup>	64%
Q26: Overall satisfaction, <b>retail services</b> (% satisfied)	84%	85%
Q32/1_1: Contacted <b>water services</b> provider with an enquiry	6%	8%
Q32/1_2: Contacted <b>water services</b> provider with a complaint	3%	4%
Q32/2_1: Contacted <b>sewerage service</b> provider with an enquiry	4%	3%
Q32/2_2: Contacted <b>sewerage service</b> provider with a complaint	1%	1%
Q32/3_1: Contacted <b>retail service</b> provider with an enquiry	12%	8%
Q32/3_2: Contacted <b>retail service</b> provider with a complaint	2%	2%





## 3.8. Business Size

This chapter details significant differences between businesses of different sizes

**Table 6: Business size, key question comparisons, 2024**

	1-10 (a)	11-50 (b)	51-250 (c)	250+ (d)
Q05: Overall satisfaction, <b>water services</b> (% satisfied)	88%	90%	90%	87%
Q07: Action taken to reduce water usage (% taken action)	43%	41%	47%	51% <sup>ab</sup>
Q09: Overall satisfaction, <b>sewerage services</b> (% satisfied)	83% <sup>d</sup>	83% <sup>d</sup>	84% <sup>d</sup>	74%
Q12: <b>Water service</b> provider cares about the service it gives to customers (% agree)	38%	40%	40%	45% <sup>a</sup>
Q14: Trust in <b>water service</b> provider (% 9-10 out of 10)	47%	50%	51%	53% <sup>a</sup>
Q26: Overall satisfaction, <b>retail services</b> (% satisfied)	65%	68%	70%	71% <sup>a</sup>
Q32/1_1: Contacted <b>water services</b> provider with an enquiry	7%	4%	8%	13% <sup>abc</sup>
Q32/1_2: Contacted <b>water services</b> provider with a complaint	3%	2%	3%	4%
Q32/2_1: Contacted <b>sewerage service</b> provider with an enquiry	3%	3%	4%	7% <sup>ab</sup>
Q32/2_2: Contacted <b>sewerage service</b> provider with a complaint	3%	1%	2%	2%
Q32/3_1: Contacted <b>retail service</b> provider with an enquiry	12%	13%	21% <sup>ab</sup>	27% <sup>ab</sup>
Q32/3_2: Contacted <b>retail service</b> provider with a complaint	8%	4%	8%	7%



## 4. Appendix

### Questionnaire: Testing the Waters



<b>Client name:</b>	CCW
<b>Project name:</b>	Testing the Waters
<b>Job number:</b>	9646
<b>Methodology:</b>	CATI
<b>Version</b>	1

#### Notes on this document

- Instructions in CAPS are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
  - Screener questions are labelled S01, S02, S03 etc.
  - Main survey questions are labelled Q01, Q02, Q03 etc.
  - Further demographic / classification questions are labelled C01, C02, C03 etc.
  - Number codes are included on each question for data processing purposes



## Questionnaire quality checklist

Please use this list to check your script before it is sent to data for set up. Speak to your PM if you are unsure about any of these checks.

	Are quotas or sampling requirements clearly specified?
<b>Labelling</b>	Is the script labelled with the client name, job, project code and version?
	Do all questions have a unique number?
	Are all questions numbered consistently with proper conventions for screener (S0X) and classification (C0X) questions?
	Have all information pages been entered correctly as 'INFO1', 'INFO2'...
	Have all notes to data (which aren't questions) been entered onto one line starting with 'DP NOTE: '?
	Is each question to one of the specified question types? (See 'labelling_questionnaire.xls' in your project file if you aren't sure).
	Have all grid questions been entered into separate tables with the grid label (column) first then a separate table for grid item (row)?
<b>Routing, ordering</b>	Does each question have a base description which begins 'Base: '?
	Are routing instructions easy to understand, do they reference the correct questions earlier in the survey?
	Are exclusive and fixed codes identified where necessary?
	Are answer lists ordered or randomized appropriately?
<b>Language</b>	Is the phrasing of each question complete, simple and easily read on screen and aloud?
	Is the phrasing of each question appropriate for its delivery mode (self-completion or interviewer led)?
	Do the answer codes of closed questions relate directly to the question?
<b>NR</b>	Have options for 'other, don't know etc.' been deployed appropriately?
	Do all sensitive or personal questions include 'Prefer not to say'?
<b>Code labels</b>	Are answer options coded correctly (Unique, sequential order 1~79)
	Are all DK/PNTS options coded correctly? (80~99)
	• Other (80 - 82)
	• Don't know (85)
	• Prefer not to say / refused (86)
• None of the above / not applicable (87)	
• Can't remember (88)	
• Not stated / not answered (89)	
<b>Quality</b>	Does this survey require any of the following? Include if appropriate
	• Contact collection for further research
	• Contact collection for interviewer validation
	• Attention or data quality check questions
<b>Have you proof-read the questionnaire for spelling and grammatical errors?</b>	

Please confirm that you have checked this script against these criteria:

<b>Initials</b>	<b>Date</b>
-----------------	-------------



**Introduction**

My name is....., and I am calling from DJS Research Ltd, an independent research consultancy.

We are carrying out research on behalf of the Consumer Council for Water (referred to as CCW), the water watchdog who are responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are speaking to a cross section of businesses to understand perceptions of their current water and sewerage service.

INTERVIEWER: ASK IF THE PERSON RESPONSIBLE FOR PAYING THE WATER BILL IS AVAILABLE TO TAKE PART IN A 15 MINUTE SURVEY ABOUT THEIR WATER AND SEWERAGE SERVICE.

IF NO:  
Ask when would be a convenient time to call back; make call back appointment

IF YES & PUT THROUGH:  
Thank you for taking my call. My name is.....and I am calling from DJS Research Ltd, an independent market research company. We are carrying out research on behalf of the Consumer Council for Water (referred to as CCW), the water watchdog responsible for ensuring the water and sewerage industry maintains the best level of service for its customers. We are speaking to a cross section of businesses for their views on water, sewerage and billing services.

Please can you spare us 15 minutes to give us your opinion on this?

The interview will be conducted under the Market Research Society Rules guaranteeing anonymity and there would be strictly no sales or other comeback from your participation.

**S01.**

**Base: All respondents**

Is your business usually run from a business premises or from somewhere else, e.g. a home residence or a mobile business?

*INT: Do not read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Business premises		
2	We're a hybrid business (e.g. we have business premises, but also have staff contracted to work from home)		
3	No fixed business premises (e.g. van / home residence)		THANK & CLOSE
85	Don't know		THANK & CLOSE

**S02.****Base: All respondents**

Does your business operate from a single business premises, or multiple premises? (Please note: this is business premises only, and does not include home working)

*INT: Do not read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	A single business premises		
2	Multiple business premises		
85	Don't know		THANK & CLOSE

**S03.****Base: All respondents**

Which of the following best describes who deals with utility suppliers or pays the water bill for your business?

*INT: Do not read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	I deal with and/or pay the utility bills for the business		
2	Someone else in the business is responsible for dealing with and/or paying the utility bills for the business		REVERT TO INTRO AND FIND RELEVANT PERSON / CLOSE
3	A consultant or broker deals with and pays the utility bills for our business		THANK & CLOSE
4	We operate under self-supply licence		THANK & CLOSE
85	Don't know		THANK & CLOSE



**S04.**

**Base: All respondents**

[IF CODE 1 AT S02: Is your business premises based in England, Wales or somewhere else] /

[IF CODE 2 AT S02: Are your business premises in England, Wales, both or somewhere else?

*INT: Read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	England		CODE AS ENGLAND
2	Wales		CODE AS WALES
3	England and Wales	ONLY SHOW IF CODE 2 AT S02	
4	Somewhere else		THANK & CLOSE
85	Don't know		THANK & CLOSE

**S05.**

**Base: All code 3 at S04**

Is the site you work at in England or Wales?

*INT: Do not read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	England		CODE AS ENGLAND
2	Wales		CODE AS WALES
85	Don't know		THANK & CLOSE

**S06.****Base: All respondents**

Please give a rough estimate of the number of employees...

*INTERVIEWER: Read out each statement, tick one response for each statement.*

*INTERVIEWER NOTE: Employees at a site should include those who are currently working from home during Covid restrictions*

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	1		
2	2-10		
3	11-50		
4	51-100		
5	101-250		
6	More than 250		
85	Don't know		

Statement number	Statement	Scripting notes	Routing
1	At the premises you work at (Please note: this should include anyone who is currently working from home but would ordinarily work from the business premises)	ONLY SHOW IF CODE 2 AT S02	
2	Employed by the business (Please note: this should include anyone who is working from home)		

**INFO1.****Base: All code 2 at S02**

From this point on the questions are about the business site which you usually work at.



## S07.

### Base: All respondents

Would you say the nature of your business is mainly...

*INT: Tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Agriculture, Forestry and Fishing		
2	Mining and Quarrying		
3	Manufacturing		
4	Electricity, Gas, Steam and Air Conditioning Supply		
5	Water Supply; Sewerage, Waste Management and Remediation Activities		
6	Construction		
7	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles		
8	Transportation and Storage		
9	Accommodation and Food Service Activities		
10	Information and Communication		
11	Financial and Insurance Activities		
12	Real Estate Activities		
13	Professional, Scientific and Technical Activities		
14	Administrative and Support Service Activities		
15	Public Administration and Defence; Compulsory Social Security		
16	Education		
17	Human Health and Social Work Activities		
18	Arts, Entertainment and Recreation		
19	Other Service Activities		
80	Other ( <i>specify</i> )		
85	Don't know		<b>THANK &amp; CLOSE</b>





**S08.**

**Base: All respondents**

What water and sewerage services are you billed for at this site? (INTERVIEWER, IF NECESSARY: this is the site that you usually work at)

*INT: Tick all that apply*

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Water		<b>IF NOT SELECTED, THANK &amp; CLOSE</b>
2	Sewerage		
3	Surface water (rainwater) drainage		
4	Trade Effluent removal		
80	Other ( <i>specify</i> )	<b>OPEN</b>	
85	Don't know		<b>THANK &amp; CLOSE</b>

**S09.**

**Base: All respondents**

For the site you usually work at, how much do you pay for all of these services in total each year?

*INT: Tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Less than £500		
2	£500-£999		
3	£1,000-£1,999		
4	£2,000-£4,999		
5	£5,000-£9,999		
6	£10,000-£49,999		
7	£50,000 or more		
85	Don't know		



## SERVICE PROVIDERS

### Q01.

#### Base: All respondents

Which company provides water services to the site you usually work at

*INT: If respondent gives an answer that is not shown, refer to your retailer list (supplied separately) – and check if the **water** service provider is the corresponding company, or not*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water		
2	Dwr Cymru (Welsh Water)		
3	Hafren Dyfrdwy		
4	Northumbrian Water		
5	Severn Trent		
6	South West Water		
7	Southern Water		
8	Thames Water		
9	United Utilities		
10	Wessex Water		
11	Yorkshire Water		
12	Bournemouth Water		
13	Bristol Water		
14	Cambridge Water		
15	Cholderton Water		
16	Essex & Suffolk Water		
17	Hartlepool Water		
18	Portsmouth Water		
19	South East Water		
20	South Staffs Water		
21	SES Water		
22	Affinity Water		
23	Private water supply doesn't come from a water company (e.g. borehole)		THANK & CLOSE



80	Other ( <i>specify</i> )		
85	Don't know		

## Q02.

### Base: All code 2 at S08 and codes 12-24 at Q01

Which company provides sewerage and drainage services for this site (i.e. removes and treats water used by staff toilets, kitchens and water used for business purposes where it doesn't need specialist treatment)?

*INT: If respondent gives an answer that is not shown, refer to your retailer list (supplied separately) – and check if the **water** service provider is the corresponding company, or not*

### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water Services Ltd		
2	Dwr Cymru (Welsh Water)		
3	Hafren Dyfrdwy		
4	Northumbrian Water Ltd		
5	Severn Trent Water Ltd		
6	South West Water Ltd		
7	Southern Water Services Ltd		
8	Thames Water Utilities Ltd		
9	United Utilities Water PLC (North West Water)		
10	Wessex Water Services Ltd		
11	Yorkshire Water Services Ltd		
12	I have a private facility/septic tank		
80	Other ( <i>specify</i> )		
85	Don't know		



**Q03. QUESTION REMOVED 2024**

**Q04. QUESTION REMOVED 2024**

**Q05.**

**Base: All respondents**

Thinking now about wholesale water supplied to this site for offices, toilets, or business processes, overall, how satisfied or dissatisfied are you with the water supplied to this site?

*INT: Read out, tick one only*

**SINGLE RESPONSE**

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know ( <i>do not read out</i> )	-	



**Q06.**

**Base: All who are dissatisfied (codes 4/5) at Q05**

Why are you dissatisfied with the water supplied to your site?

*INT: Do not read out, tick all that apply*

*MULTI RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Cost/prices have risen / bills too expensive	DATA NOTE FOR TABS: GROUP AS Bills / costs too high	
3	Water supply issues not resolved	DATA NOTE FOR TABS: GROUP AS Water supply problems	
4	Poor water quality – appearance, taste or smell	DATA NOTE FOR TABS: GROUP AS Water supply problems	
5	Leaking pipes	DATA NOTE FOR TABS: GROUP AS Wholesale issues	
6	Water meter issues/problems	DATA NOTE FOR TABS: GROUP AS Wholesale issues	
7	Bill inaccurate	DATA NOTE FOR TABS: GROUP AS Retail service issues	
8	Meter readings wrong / not taken	DATA NOTE FOR TABS: GROUP AS Retail service issues	
9	Poor customer service	DATA NOTE FOR TABS: GROUP AS Retail service issues	
10	Problems with water pressure	DATA NOTE FOR TABS: GROUP AS Wholesale issues	
11	Lack of water efficiency advice or service	DATA NOTE FOR TABS: GROUP AS Retail service issues	
12	Concern re safety of water	DATA NOTE FOR TABS: GROUP AS Water supply problems	
13	Poor reliability of water supply (interruptions)	DATA NOTE FOR TABS: GROUP AS Water supply problems	
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q07.****Base: All respondents**

What actions, if any, has your business taken to reduce its use of water and be more water efficient at this site? *INT: Do not read out, tick all that apply*

*MULTI RESPONSE*

Code	Answer list	Scripting notes	Routing
1	Nothing?	EXCLUSIVE	
2	Hippo/Save A Flush device in toilet cisterns		
3	Water efficient taps		
4	Made employees aware of the need to reduce water consumption		
5	Asked for smart meters		
6	Changed business processes to use less water		
7	Rainwater harvesting		
8	Only put required amount in kettle		
9	Undertaken water audits		
10	Have fixed leaks on the premises		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q07a.****Base: All respondents**

How interested, if at all, would you be in learning how to make water savings for your business if such a service were to be offered?

(For example, information provided by your retailer online or a water efficiency audit in person)

*INT: Read out, tick one only*

*SINGLE RESPONSE*

Code	Answer list	Scripting notes	Routing
1	Very interested	-	
2	Quite interested	-	
3	Not very interested	-	
4	Not at all interested	-	
85	Don't know ( <i>do not read out</i> )	-	

**Q08.****Base: All code 1 (nothing) at Q07**

What, if anything, is stopping you from taking measures to reduce the use of water at this site?

*INT: PROBE ON REASONS WHY. IF MENTIONED USE THE PRE-CODES BELOW (BUT DON'T READ OUT), IF NOT WRITE IN OPEN RESPONSE*

*MULTI RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	We've had no information or advice about reducing water use		
2	We're not aware that we need to reduce the amount of water we use		
3	There's nothing we can do to reduce the amount of water that we use		
4	Our bills for water are low and we don't feel the need to reduce the amount we use		
5	Reducing the amount of water we use would make no difference to the amount we pay for our water bills		
6	We're not able to measure how much water we are using or potentially saving ourselves		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q09.****Base: All code 2 at S08**

Thinking now about the sewerage and surface water drainage services provided for this site, overall, how satisfied or dissatisfied are you with your sewerage services?

*INT: Read out, tick one only*

*SINGLE RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Very satisfied	-	
2	Fairly satisfied	-	
3	Neither satisfied nor dissatisfied	-	
4	Fairly dissatisfied	-	
5	Very dissatisfied		
84	Not applicable		
85	Don't know ( <i>do not read out</i> )	-	

**Q010.****Base: All who are dissatisfied (codes 4/5) at Q09**

Why are you dissatisfied with the sewerage services supplied to your site?

*INT: Do not read out, tick all that apply**MULTI RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Cost/prices have risen		
2	Sewerage service problems not resolved		
3	Problems with sewers/drains		
4	Poor customer service		
5	Problems with blockages i.e. pipes, drains, toilets, sewers etc.		
6	Problems with flooding i.e. sewage overflow etc.		
7	Problems with drains i.e. bad smells/collapsing etc.		
8	Sewerage services not providing full service i.e. having to pay additional company to pump sewage etc.		
9	Environmental concerns i.e. pumping into sea/sewage in wildlife etc.		
10	Site not drained properly – liable to flooding		
11	Site area (surface water) drainage tariff unfair		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q011. QUESTION REMOVED 2022**





## Q012.

### Base: All respondents

How much do you agree or disagree that [PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80] / [IF CODE 85 AT Q01: your water service provider] cares about the service it gives to business customers?

*INT: Read out, tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Strongly agree	-	
2	Slightly agree	-	
3	Neither agree nor disagree	-	
4	slightly disagree	-	
5	Strongly disagree		
85	Don't know ( <i>do not read out</i> )	-	

## Q013.

### Base: All code 1-2 or 4-5 at Q12

You said you [INSERT RESPONSE FROM Q12] that your water service provider cares about the service it gives to business customers. Why do you say that?

*INT: Probe fully*

#### OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know ( <i>do not read out</i> )		



## Q014.

### Base: All respondents

How much do you trust [PULL THROUGH IF COMPANY FROM Q01 IS CODE 1-24 or 80]/ [IF CODE 26 OR 85 AT Q01: your water service provider]?

*INT: Read out, tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely trust	-	
2	Slightly trust	-	
3	Neither trust nor distrust	-	
4	Slightly distrust	-	
5	Completely distrust		
85	Don't know ( <i>do not read out</i> )	-	

## Q015. QUESTION REMOVED 2022

## INFO2.

### Base: All respondents in England (Code 1 at S04 or S05)

Since April 2017, businesses, charities and public sector organisations in England have been able to change the company providing their retail services (as they are able to with energy), or negotiate a better deal with their existing service provider. Retailers provide bills, customer services and read any water meters at this site.

## Q016.

### Base: All respondents in England (Code 1 at S04 or S05)

Before this survey, were you aware that you can switch your retail service provider or negotiate a better deal with your existing provider?

*INT: Do not read out, tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	



### Q017.

**Base: All code 1 (yes) at Q16**

Since the market opened, or in the last seven years, has your organisation done any of the following? Please select all that apply...

*INT: Read out, tick all that apply*

#### MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Chosen a new retail service provider switched to them	-	
2	Not switched, but negotiated a better price or service contract with your existing service provider	-	
3	Looked for information about the choices available but decided not to switch or renegotiate		
4	Looked for information about the choices available and have not yet decided whether to act on this		
5	Tried to switch but the switch was cancelled		
6	Taken no action to find out about the market or choices available		
7	Tried to switch but unable to because locked in to a current contract		
8	Been proactively contacted by a new retail service provider to switch		
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

### Q17b.

**Base: All more than one of code 1-8 selected at Q17**

Which of these have you done most recently?

*INT: Read out, tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Chosen a new retail service provider switched to them	ONLY SHOW IF SELECTED AT Q17	
2	Not switched, but negotiated a better price or service contract with your existing service provider	ONLY SHOW IF SELECTED AT Q17	
3	Looked for information about the choices available but decided not to switch or renegotiate	ONLY SHOW IF SELECTED AT Q17	
4	Looked for information about the choices available and have not yet decided whether to act on this	ONLY SHOW IF SELECTED AT Q17	
5	Tried to switch but the switch was cancelled	ONLY SHOW IF SELECTED AT Q17	



6	Taken no action to find out about the market or choices available	ONLY SHOW IF SELECTED AT Q17	
7	Tried to switch but unable to because locked in to a current contract	ONLY SHOW IF SELECTED AT Q17	
8	Been proactively contacted by a new retail service provider to switch	ONLY SHOW IF SELECTED AT Q17	
85	Don't know ( <i>do not read out</i> )	ALWAYS SHOW	

### Q17a.

#### Base: All code 1 or 2 at Q17

[IF CODE 1 AT Q17: You said you have switched to a new retail service provider, since switching have you had...] / [IF CODE 2 AT Q17: You said you have negotiated a better price or service contract with your retail provider, since negotiating this new contract, have you had...]

*INT: Do not read out, tick one only*

#### SINGLE GRID

Statement number	Statement	Scripting notes	Routing
1	Better service		
2	Better value for money		
3	Water efficiency service (For example, water efficiency audits and assistance in reducing water consumption)		

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	



### Q019.

**Base: All code 1 at Q17**

Overall, how satisfied or dissatisfied were you with the switching process?

*INT: Read out. Code one only*

SINGLE RESPONSE.

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

### Q020.

**Base: All who disagree (codes 4/5) at Q19**

Why were you dissatisfied with the switching process?

*INT: Do not read out, tick all that apply*

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Took too long		
2	New account details are wrong – name, payments etc.		
3	Closing bill inaccurate – estimated meter reading		
4	Meter details are incorrect		
5	Getting two bills for one meter		
6	Errors in contract		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	



## Q018.

### Base: All respondents

Which retailer service provide **bills** your business for water services, provides customer services and reads any water meters at this site?

*INT: Code one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Advanced Demand Side Management (ADSM)		
2	Affinity for Business (Retail)	Code with code 12 Castle Water for analysis	
3	<b>Affinity Water</b>		
4	Albion		
5	<b>Anglian Water (Hartlepool Water)</b>		
6	Anglian Water Business (Wave)		
7	Bournemouth Water Business (AKA Pennon, or Source for Business)		
8	<b>Bristol Water</b>		
9	Business Stream		
10	Cambrian		
11	<b>Cambridge Water</b>		
12	Castle Water		
13	Clear Business Water		
14	ConservAqua		
15	Dŵr Cymru (Welsh water)		
16	Everflow		
17	First Business Water		
18	Hafren Dyfrdwy		
19	Icosa Water Services		
20	Independent Water Networks (IWN)		
21	Kelda		
22	Olympos		
23	<b>Northumbrian Water Essex and Suffolk</b>		
24	<b>Essex and Suffolk Water</b>		
25	NWG Business (Retail)		



26	Pennon Water Services (Source for Business)		
27	<b>Portsmouth Water</b>		
28	Regent Utilities		
29	<b>Bournemouth Water</b>		
30	SES Business Water		
31	<b>Severn Trent Water</b>		
32	Smarta Water		
33	Source for Business (Pennon)		
34	<b>South East Water</b>		
35	<b>South Staffs Water</b>		
36	South Staffs Water Business (SSWB)		
37	<b>South West Water</b>		
38	South West Water Business		
39	<b>Southern Water</b>		
40	<b>SES Water (Sutton &amp; East Surrey Water)</b>		
41	Smarta Water		
42	Source for Business		
43	SSE Water		
44	<b>Thames Water</b>		
45	Thames Water Commercial Services		
46	The Water Retail Company		
47	<b>United Utilities</b>		
48	Veolia		
49	Water 2 Business		
50	Water Plus		
51	Waterscan		
52	Wave		
53	<b>Wessex Water</b>		
54	<b>Yorkshire Water</b>		
55	Yu water		
80	Other ( <i>specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )		

**Q019. QUESTION MOVED 2024**

**Q020. QUESTION MOVED 2024**

**Q021.****Base: All who have not switched (codes 2, 3, 4 and 6) at Q17**

Could you tell me the main reason you have chosen not to switch or renegotiate your contract?

*INT: Do not read out, tick all that apply**MULTI RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Too busy/not enough time/not a priority at the moment		
2	Happy with current provider/don't want to switch		
3	Not a big difference in price/quality		
4	Not interested/haven't thought about it		
5	No other providers available		
6	Don't know much about it		
7	Haven't had the business for that long		
8	I am looking into switching		
9	Only use a small amount of water/only a small bill		
10	Bad experiences of other water retailer(s)		
11	Only just found out about the ability switch		
12	Other retailers are too expensive		
13	No knowledge of other retailers/don't know who to switch to		
14	Not my responsibility/other person deals with bill		
15	It automatically switched/I had no choice		
16	The terms (including small print) were not in line with what we'd expected		
17	Couldn't get enough clear information to base a decision on		
19	No real reason		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q022. QUESTION REMOVED 2024****Q023. QUESTION REMOVED 2022**





**INFO3.**

**Base: All respondents**

The next few questions are about your water retailer (the company that provides billing, meter reading and customer service at your site)

**Q024. QUESTION REMOVED 2024**

**Q024a. QUESTION REMOVED 2024**

**Q025. QUESTION REMOVED 2024**

**Q026.**

**Base: All respondents**

How satisfied or dissatisfied are you with the services provided by your water retailer, [INSERT RETAIL PROVIDER FROM Q18, UNLESS CODE 85]?

Note: services your retailer is responsible for include: billing, responding to complaints/inquiries and reading your meter.

*INT: Read out. Code one only*

SINGLE RESPONSE.

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

**Q027.****Base: All who disagree (codes 4-5) at Q26**

Why are you dissatisfied?

*INT: Do not read out, tick all that apply**MULTI RESPONSE*

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	Cost/prices have risen		
2	Bills generally too expensive		
3	Poor/inefficient service/issues not resolved		
4	Bill inaccurate		
5	Problems after account transferred		
6	Water meter issues/problems		
7	Meter readings wrong / not taken		
8	No access to water meter i.e. water meter has been blocked off etc.		
9	Can't get through on the phone		
10	Delay in responding to query		
11	Not taking ownership of problems		
12	Not sure who to contact anymore		
13	Can't / don't have an account manager		
14	Poor customer service		
15	Need more clarity/information about service		
16	Price of service i.e. too expensive/price has been increased etc.		
17	They should have made it clear who they are/account transferred		
18	They didn't offer a long enough payment holiday during COVID-19		
19	Their general response to COVID-19 was not good enough		
20	They haven't offered us any water efficiency services		
80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

**Q028. QUESTION REMOVED 2024****Q029. QUESTION REMOVED 2024**



**Q030. QUESTION REMOVED 2024**

**Q031.**

**Base: All respondents in Wales (S04/2 or S05/2)**

Currently in Wales, businesses which use more than 50,000 cubic metres (m<sup>3</sup>) of water a year can switch their retail service provider like they can in energy. Were you aware of this prior to the survey?

*INTERVIEWER: Do not read out.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	

**Q31a.**

**Base: All respondents in Wales (S04/2 or S05/2)**

Are you aware of Welsh government's engagement on future legislative changes which could mean that in the future no business in Wales would be able to change their water retail provider?

*INTERVIEWER: Do not read out.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	

**Q31b.**

**Base: All code 1 (yes) at Q31a**

How did you hear about this?

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know ( <i>do not read out</i> )	-	



### Q31c.

#### Base: All code 1 (yes) at Q31a

How satisfied or dissatisfied are you with the potential changes to businesses and their choice of water retailer in Wales?

[INTERVIEWER, IF NECESSARY, READ OUT: as a reminder in the coming year the Welsh government could make legislative changes which means that no business in Wales will be able to change their water retail provider]

*INT: Do not read out, tick one only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

### Q31d.

#### Base: All code 1-5 at Q31c

Why do you say that?

#### OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know ( <i>do not read out</i> )	-	

### INFO4.

#### Base: All respondents

The final set of questions are about any contacts you might have had with your water service provider, sewerage service provider or your retail service provider in the past 12 months.



### Q032.

#### Base: All respondents

In the past 12 months have you contacted any of the following with an enquiry or complaint?

*INTERVIEWER: Read out each statement, tick one response for each statement.*

MULTI GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Yes – with an enquiry	-	
2	Yes – with a complaint		
2	No – not contacted them with an enquiry or complaint	EXCLUSIVE	
85	Don't know ( <i>do not read out</i> )	-	

Statement number	Statement	Scripting notes	Routing
1	Your water services supplier, [INSERT PROVIDER FROM Q1]		
2	Your sewerage and drainage supplier, [INSERT PROVIDER FROM Q2]	Filter on S08=2	
3	Your retail provider (the company that sends your bills), [INSERT PROVIDER FROM Q18]		

### Q033.

#### Base: All respondents who made a complaint (Q32\_1/2 AND/OR Q32\_2/2 AND/OR Q32\_3/2)

You said you have contacted [INSERT PROVIDER COMPLAINED TO AT Q32] with a complaint. What was the complaint about?

*INTERVIEWER: PROBE FULLY.*

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
85	Don't know / Prefer not to say ( <i>do not read out</i> )	-	



### Q034.

**Base: All respondents who made a complaint (Q32\_1/2 AND/OR Q32\_2/2 AND/OR Q32\_3/2). If more than 1 complaint made, repeat question for each**

To what extent were you satisfied with the outcome of your complaint with [INSERT PROVIDER FROM Q32]?

*INT: Do not read out, tick one only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

### Q035.

**Base: All respondents who have contacted a provider with an enquiry in the last 12 months, code 1 (yes) at Q32 for at least one provider**

What did you contact [INSERT PROVIDER CONTACTED FROM Q32] about?

*INT: Do not read out, tick all that apply.*

REPEAT FOR EACH PROVIDER CONTACTED. MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	A general Billing enquiry		
2	To report a leak		
3	Sewerage problem		
4	Loss of supply		
5	Issue with water meter		
6	No supply/supply issue		
7	Water quality		
8	Water pressure		
9	To change to/ask for a water meter		
10	To find out about switching		
11	A billing enquiry related to Covid-19		
12	To enquire about water efficiency services / how to reduce our water use		



80	Other ( <i>Specify</i> )	OPEN	
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	

### Q036.

**Base: All respondents who have contacted a provider in the past 12 months, code 1 or 2 at Q32**

Overall, how satisfied or dissatisfied were you with the contact with...

*INT: Read out. Code one only*

SINGLE GRID, RANDOMISE STATEMENTS

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

Statement number	Statement	Scripting notes	Routing
1	Your water services supplier, [INSERT PROVIDER FROM Q1]	ONLY SHOW IF CODE 1 YES AT Q32	
2	Your sewerage and drainage supplier, [INSERT PROVIDER FROM Q2]	ONLY SHOW IF CODE 1 YES AT Q32	
3	Your retail provider (the company that sends your bills), [INSERT PROVIDER] from Q18	ONLY SHOW IF CODE 1 YES AT Q32	



**Q037.**

**Base: All respondents who have contacted a provider in the past 12 months, code 1 or 2 at Q32**

Overall, how satisfied or dissatisfied were you with the following aspects of your contact with [INSERT PROVIDERS CONTACTED]

*INT: Read out. Code one only*

SINGLE GRID, RANDOMISE STATEMENTS. REPEAT FOR EACH PROVIDER CONTACTED AT Q32

Code	Answer list	Scripting notes	Routing
1	Very satisfied		
2	Fairly satisfied		
3	Neither satisfied nor dissatisfied		
4	Fairly dissatisfied		
5	Very dissatisfied		
85	Don't know ( <i>do not read out</i> )		

Statement number	Statement	Scripting notes	Routing
1	The ease of contacting someone who was able to help you		
2	The quality or clarity of information provided		
3	The knowledge and professionalism of staff		
4	The feeling that your query had been, or would be, resolved		
5	The way that you were kept informed of progress with your enquiry (and /or) claim		
6	The speed with which your query was resolved		

**Q038. QUESTION REMOVED 2024**

**Q039. QUESTION REMOVED 2024**





**CLOSE**

**C01.**

**Base: All respondents**

Approximately, what is your business' annual turnover?

*INT: Record figure and then code into bands below. If respondent is unable to provide an approximate number, then offer the bands instead.*

OPEN RESPONSE

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	
86	Prefer not to say ( <i>do not read out</i> )	EXCLUSIVE	

<b>Code</b>	<b>Answer list</b>	<b>Scripting notes</b>	<b>Routing</b>
1	£0-£100,000		
2	£100,001 - £250,000		
3	£250,001 - £500,000		
4	£500,001 - £1,000,000		
5	£1,000,001 - £2,500,000		
6	£2,500,001 - £5,000,000		
7	£5,000,001 - £10,000,000		
8	£10,000,001 - £25,000,000		
9	£25,000,001 - £50,000,000		
10	£50,000,001 - £100,000,000		
11	£100,000,000+		



## NEW01.

### Base: All respondents

Which of the following payment arrangements do you normally use to pay your bill?

*INTERVIEWER: Read out.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Pay in advance		NEW2
2	Direct debit		NEW3
3	Bank transfer or card payment		C02
4	Some other way (please say how)	OPEN TEXT	C02
86	Prefer not to say ( <i>do not read out</i> )		C02
85	Don't know ( <i>do not read out</i> )		C02

## NEW02.

### Base: Pay in advance (NEW01 = 1)

You mentioned that you normally pay your retailer in advance.

Has your retailer made you aware of any alternative payment options open to you? Please select as many as apply

*INTERVIEWER: Read out.*

MULTI CODE

Code	Answer list	Scripting notes	Routing
1	Yes, on my bill		C02
2	Yes, on their website		C02
3	Yes, in another way (please say how)	OPEN TEXT	C02
4	No	EXCLUSIVE	C02
85	Don't know ( <i>do not read out</i> )	EXCLUSIVE	C02



### NEW03.

#### Base: Pay by Direct Debit (NEW01 = 2)

You mentioned that you normally pay your retailer by Direct Debit.  
Has your retailer ever made you aware of any credit balance on your account?

*INTERVIEWER: Do not read out.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes		NEW04
2	No		C02
85	Don't know ( <i>do not read out</i> )		C02

### NEW04.

#### Base: Made aware of credit balance (NEW03 = 1)

You mentioned that in the past your retailer has made you aware of credit balance on your account.

Did your retailer explain how to claim back any money that you may be owed?

*INTERVIEWER: Do not read out.*

SINGLE CODE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know ( <i>do not read out</i> )		

### C02.

#### Base: All respondents

Would it be OK if DJS Research re-contacted you if we have a need to further clarify any of the responses you have given in this survey today?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes ( <b>VERIFY CONTACT DETAILS</b> )	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	



### C03.

#### Base: All respondents

Would you be willing to be contacted for future research about your experiences of water and sewerage on behalf of the Consumer Council for Water (CCW)? (By agreeing to this, you would be consenting for your details to be passed to CCW who might then pass them on to another research provider)

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes ( <b>RECORD CONTACT DETAILS</b> )	-	
2	No	-	
85	Don't know ( <i>do not read out</i> )	-	

### C04. QUESTION REMOVED 2024

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