

CCWater Research Report Testing the Waters 2016 Summary of Research Findings for Southern 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 Southern 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) | 90% | 87% to 95% | 92% | 92% for England and Wales |
| Overall satisfaction with sewerage services (Sample size: 169) | 72% | 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> | 18% | 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) | 64% | 51% to 71% | 65% | 66% for England and Wales |
| Satisfied with value for money of sewerage service (Sample size: 190) | 60% | 50% to 70% | 64% | 65% for England and Wales |

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| Satisfied with value for money of surface water drainage service (Sample size: 49) | 53% | 40% to 70% | 54% | Small sample size: indicative finding 55% for England and Wales |
| Satisfied with value for money of trade effluent (Sample size: 8**) | 63% | 55% to 78% | 61% | Small sample size: indicative finding |
| Top answer: causes of dissatisfaction with value for money (unprompted) (Sample size: 22**) <i>Cost/prices have risen</i> | 32% | 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) | 49% | 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) | 7.00 | 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) | 79% | 72% to 84% | 79% | 80% for England and Wales |
| Top answer: what billing improvement would businesses like to see (unprompted) (Sample size: 200) <i>Cheaper</i> | 15% | 10% to 18% | 13% | <i>Cheaper</i> 13% for England and Wales |

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| Consumer Rights and Responsibilities | | | | |
| Aware of GSS scheme (Sample size: 200) | 38% | 38% to 56% | 46% | 45% for England and Wales |
| Aware of Surface Water Drainage rebate (Sample size: 200) | 31% | 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) | 39% | 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: 46 All those who disagree that they get the advice and support you need) <i>Ways to reduce the bill</i> | 28% | 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) | 8% | 6% to 14% | 9% | 8% for England and Wales |
| Top answer: Where did these businesses look for information? (Sample size: 15**) <i>Internet</i> | 67% | 20% to 76% | 40% | Small sample size: indicative finding 40% for England and Wales |

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| Top answer – information requested: <i>Burst pipe/ leak/ drains</i> (prompted) (Sample size: 200 ¹) | 1% | <1% to 2% | <1% | 5% for Southern Water |
| Top answer – information offered: <i>Flyer/ pamphlet/ newsletter (water update/ money saving ideas/ usage tips/ water leaks)</i> (prompted) (Sample size: 200) | 2% | <1% to 2% | <1% | 6% for Southern Water |
| Routinely read information with bill or on back of bill (Sample size: 200) | 45% | 40% to 49% | 44% | 43% for England and Wales |
| Contacted water company with query or complaint in last 12 months (Sample size: 200) | 21% | 13% to 26% | 17% | Main reason for contact was <i>to make a billing enquiry</i> (41%) |
| Satisfied with way query or complaint handled (Sample size: 41 who made contact) | 56% | 39% to 86% | 67% | Low base sizes for individual WaSCs |
| Water on Tap | | | | |
| Satisfied with colour and appearance of tap water (Sample size: 199) | 91% | 88% to 95% | 92% | 92% for England and Wales |
| Satisfied with taste and smell (Sample size: 198) | 84% | 80% to 88% | 85% | 84% for England and Wales |

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

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|---|--|-----------------|-----------------------------------|--------------------------------|
| Satisfied with hardness/softness (Sample size: 195) | 59% | 51% to 83% | 67% | 62% for England and Wales |
| Satisfied with safety (Sample size: 196) | 88% | 84% to 91% | 89% | 88% for England and Wales |
| Satisfied with reliability of supply (Sample size: 199) | 96% | 92% to 99% | 96% | 96% for England and Wales |
| Satisfied with water pressure (Sample size: 198) | 93% | 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: 138) | 59% | 45% to 61% | 53% | 53% for England and Wales |
| Satisfied with maintenance of sewerage pipes & treatment works (Sample size: 146) | 55% | 45% to 60% | 53% | 53% for England and Wales |
| Satisfied with company cleaning of waste water before releasing it back into environment (Sample size: 151) | 46% | 37% to 53% | 45% | 44% for England and Wales |
| Satisfied with company actions to minimise sewer flooding (Sample size: 158) | 53% | 47% to 61% | 53% | 54% for England and Wales |
| Satisfied with removal of surface water drainage from site (Sample size: 142) | 64% | 53% to 71% | 62% | 63% for England and Wales |

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|---|--|--------------------------|-----------------------------------|---|
| Satisfied with removal of trade effluent from site (Sample size: 4**) | 75% | 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) | 12% | 10% to 17% | 14% | 12% for England and Wales |
| Top causes of service failure (unprompted) (Sample size: 23**) <i>Burst pipe and blocked pipe</i> | 26% and 26% | 17% to 49% and 5% to 26% | 32% and 16% | Small sample size: indicative finding Top causes: <i>Burst pipe</i> and <i>blocked pipe</i> 30% and 20% for England and Wales |
| Major impact on business (Sample size: 23**) | 52% | 21% to 65% | 46% | Small sample size: indicative finding 43% for England and Wales |
| Satisfied with company response to event (Sample size: 23**) | 52% | 52% to 83% | 74% | Small sample size: indicative finding Top reason for dissatisfaction with company response was <i>we had to deal with it/fix it ourselves</i> (45%) (Unprompted – base: 11) |

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| Market Reform | | | | |
| Awareness of market reform (unprompted) (Sample size: 200) | 10% | 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) | 15% | 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: 30*) <i>From water company and Press/Newspaper/Magazine</i> | 23% and 23% | 9% to 32% and 4% to 23% | 18% and 14% | Small sample size: indicative finding 18% and 14% for England and Wales |
| Agree that the principle of competition for retail services is a good thing (Sample size: 200) | 69% | 55% to 69% | 62% | 61% for England and Wales |
| Likely to switch in 2017 (Sample size: 200) | 44% | 30% to 44% | 38% | 39% for England and Wales |
| Likely to negotiate terms with current provider (Sample size: 200) | 74% | 71% to 81% | 76% | 75% for England |

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| Extremely likely to recommend the company to friends and family as a provider ² (Sample size: 176) | 23% | 23% to 49% | 34% | 35% for England and Wales |
| Speaking up for consumers – Southern Water customers' views on: | | | | |
| Aware of consumer body for the water industry (unprompted awareness) (Sample size: 200) | 20% | 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 |

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

| Sample profile for Southern Water | | (Sample size: 200) |
|---|--|---------------------------|
| Respondent role | | |
| On-site company representative | | 43% |
| Head office company representative | | 26% |
| Both | | 24% |
| Scope of business | | |
| Single site | | 67% |
| Multiple sites in England | | 34% |
| Multiple sites in Wales | | 1% |
| Multiple sites in England and Wales | | 3% |
| Business size – number of employees | | |
| Micro 0-9 employees | | 52% |
| Small 10-49 employees | | 31% |
| Medium A 50-99 employees | | 7% |
| Medium B 100-249 employees | | 5% |
| Large 250+ employees | | 3% |
| 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%.