

Accent



Water for the North West

Affordability and Acceptability Testing Quantitative Fieldwork

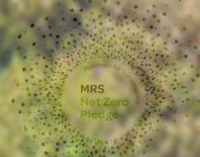
Final Report

11th September, 2023

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1 Executive Summary

1.1 Assurance Statement

This fieldwork was conducted in accordance with the requirements of the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

1.2 Methodology and Fieldwork

1,053 Household (HH) interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). 743 interviews were generated by an email approach, 310 by post. The Ofwat mandated minimum sample size was 500.

229 Non-Household (NHH) interviews were conducted. They were split 143 by NHH panel, 20 by CATI, and 66 by email contact with customers of NHH retailers operating in the United Utilities area. The Ofwat mandated minimum sample size was 200.

1.3 Summary of Results

Economic Outlook

The economic situation for households in particular was found to be tough – with 40% of households reporting having had at difficulty with paying household bills. 49% of households stated that it was difficult to manage financially or are just about getting by. 42% expect their financial situation to worsen in the next few years.

The economic situation for businesses seemed almost as pressured – with 30% of NHH participants reporting at least some difficulty paying bills and 42% finding it difficult to manage financially now or just about getting by. The outlook was better though, with 47% of businesses expecting the situation to improve and just 26% expecting it to worsen.

Affordability

Affordability of the plan was low – with just 19% of participants saying the bill increases would be very or fairly easy to afford.

Household affordability was 14%. Lower income households found the bills particularly unaffordable, with 68% of households with an income of under £10,399 finding the increases very or fairly difficult to afford. Affordability was higher amongst metered users (18%) than unmetered users (10%).

The overall affordability figure rises to 33% for NHH participants. Non-metered businesses found the plan slightly more affordable than metered businesses, but the difference was not statistically significant.

Acceptability

Acceptability of the plan was much higher than affordability – 75% overall; with 70% of Household participants finding the plan acceptable (either fairly or very).

The main reasons for HH participants not finding the plan acceptable were financially driven; with United Utilities profits, the bill increases that go along with the plan being too high, and an expectation that the company (rather than customers) should be funding the plan, being the top three responses.

Acceptability of the plan amongst NHH participants was even higher, with 86% of businesses finding the plan acceptable. This was the case even amongst businesses struggling to pay their bills (with again 86% finding the plan acceptable). There were too few NHH participants finding the plan unacceptable to be able to provide robust analysis into the reasons.

Top Priorities for investment

Reducing leakage was the top water related investment priority for both HH participants (48%) and NHH participants (45%).

Reducing the number of pollution incidents was the top sewerage related investment area for both HH participants with a majority (52% and 50% respectively) choosing it over either internal or external sewer flooding.

Of the 4 enhancement cases (affordability support, carbon reduction, smart meter installation, and hose pipe ban reduction), affordability support was the clear priority of both audiences – with 51% of HH participants and 44% of NHH participants choosing it as being most important.

Intergenerational Fairness

Both HH and NHH audiences would prefer increases to start sooner and be better spread across different generations of bill payers (36% and 48% of responses respectively).

A remarkably large proportion of HH customers (45%) said they didn't know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.

Just 20% of HH participants, and 22% of NHH participants, chose to delay increases and pass more of them on to younger and future bill payers. Participants in lower SEGs (DE) were far less likely to choose an increase now (26%) than those in SEG group AB (44%).

2 INTRODUCTION

2.1 Background

United Utilities is responsible for water and wastewater services in the North West of England. They deliver 1.8 billion litres of water a day to more than 3 million homes and businesses in the North West, as well as treat all the wastewater which disappears around the U-bend.

The water sector in England and Wales faces a series of long-term challenges. Meeting these challenges requires business planning decisions to be made in a long-term context. At PR24, water companies are required to set out their five-year business plans in the context of a 25-year long-term delivery strategy. This will help ensure that what is delivered in the short term is likely to maximise long-term value for customers, communities and the environment.

As part of this process, all water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting their plans for the upcoming Price Review (PR24) in October 2023.

To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken. This guidance has been designed to facilitate consistency and comparability between companies (e.g. question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme).

United Utilities have commissioned Accent to carry out the quantitative component of affordability and acceptability testing (AAT) with their customers. This report represents the findings from the quantitative stage.

2.2 Objectives

The overarching objective of this research is to measure customer support for the PR24 Business Plan.

More specifically, the research aims to:

- Ensure that customers' priorities and preferences are driving United Utilities PR24 investment plan decisions where appropriate.
- Provide evidence to demonstrate that customers consider the forecast bill impacts to be acceptable at various stages of development, including on affordability, levels of service and operational risk in the short and long term.
- Understand why customers have formed their opinions, and if plans are not thought to be acceptable, to understand what would need to change in order for the plan to become acceptable.

- Demonstrate that the engagement with customers reflects the potential range of affordability impacts in different futures.
- Follow the prescribed Ofwat/CCW guidance.

Accent conforms to the requirements of the quality management system ISO 20252:2019.

2.3 Report Structure

This document is the report on the quantitative stage of the affordability and acceptability testing for United Utilities. This report describes survey design and methodologies, alongside customers' view on the affordability and acceptability of United Utilities' AMP8 business plan.

2.4 Economic/media backdrop

This research was conducted against a backdrop of difficult circumstances for the economy, and with the water industry repeatedly making headline news for negative reasons.

Since late 2021, a large proportion of the UK population have been feeling the effects of the cost-of-living crisis. This has meant that households typically have less disposable income and United Utilities customers may be feeling more financially squeezed than normal.

In early February 2023, United Utilities announced that 2023/24 bills would see a 6.4% increase on 2022/23 bills. Throughout February 2023, oil and gas companies published record profits.

In May 2023 (and in reaction to public anger regarding stories of water companies releasing raw sewage into the UK waterways, a number of actions were taken within the industry.

- A number of water service provider CEOs (Yorkshire Water, Thames Water and South West Water) declined to accept their usual bonuses (water company exec bonuses having been subject to much media scrutiny and public discontent) due to poor performance.
- A joint apology was offered to the public for not acting quickly enough to prevent sewage spills, with a promise to increase investment to prevent spills in future to £10bn by 2030. However, some criticism was received due to this increased investment being funded by customers' bills.

At the end of June, the CEO of Thames Water resigned, it was revealed that the company was in £14bn of debt and there were fears it was on the verge of collapse. On August 9th the news headlines featured 6 water companies (including United Utilities) which could be facing £800m in lawsuits over allegations of underreporting pollution incidents and overcharging customers.

3 METHODOLOGY

3.1 Introduction

Generally speaking, the methodology was heavily prescribed by the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

Having said that, the guidance changed and was clarified frequently throughout the research period. In all respects (unless documented within this report) the guidance in effect at the time was consistently followed.

United Utilities’ Independent Challenge Group, YourVoice, was informed and consulted throughout the research process, including inception, design, and fieldwork (particularly on parts of the research where the guidance was not specific, there was room for interpretation, or in the rare instance that it was thought best not to follow the guidance on a particular issue).

3.2 Cognitive testing

Comprehensive cognitive testing was carried out. 10 HH and 4 NHH cognitive interviews were carried out Zoom with the participant filling in the online survey and an Accent moderator observing and probing. Findings were presented to YourVoice, and all changes resulting from the cognitive testing process were implemented with YourVoice approval. Full report can be found in Appendix G.

3.3 Sampling and approach

Household (HH) sampling

The United Utilities area was treated as a single location, all of which is dual supplied by United Utilities. The target number of interviews was 1000¹.

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation. Primarily, the recruitment used a push-to-web approach with online survey links and QR codes provided in the letter and email invitations. Participants were also offered the opportunity to make accessibility requests (including

¹ The minimum sample size listed in the guidance issued by Ofwat and CCW was 500.

requesting a paper version of the questionnaire to fill in and post back – 39 such requests were received and honoured).

The guidance mandates that areas of differing deprivation (as defined by the Index of Multiple Deprivation (IMD)) be boosted or suppressed by certain percentages, to account for lower response rates amongst more deprived areas and their importance in the research. The process by which this component of the guidance was followed, was to effectively convert the percentage given in the guidance to a “boost factor”, to sample by IMD decile naturally (using a consistent assumed response rate) and then adjust the number of selections by the boost factor. Where the IMD decile was not known, no boost was applied. The calculations used to define the universe for the research (and from which all sub-sampling was conducted), follows:

IMD Decile	Properties in supply area	Percentage of supply area	ideal interview split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Boost Factor	Sample to be drawn (adjusted)
1	627931	21.96%	220	4%	5489	1.25	6862
2	356291	12.46%	125	4%	3115	1.25	3893
3	286124	10.01%	100	4%	2501	1.1	2751
4	243945	8.53%	85	4%	2133	1.1	2346
5	213929	7.48%	75	4%	1870	1	1870
6	192882	6.74%	67	4%	1686	1	1686
7	218464	7.64%	76	4%	1910	0.9	1719
8	243140	8.50%	85	4%	2126	0.9	1913
9	211861	7.41%	74	4%	1852	0.75	1389
10	180417	6.31%	63	4%	1577	0.75	1183
Unknown	84769	2.96%	30	4%	741	1	741
TOTAL	2859753		1000		25000		26354

This ensured that the selection (a) matched the profile of the United Utilities area, and (b) boosted each IMD decile appropriately in line with the guidance.

Sample Exclusions were kept to a minimum (and were checked with both Ofwat and YourVoice):

- Any non-Domestic Customers
- Any Sundry Accounts
- Any Void Accounts
- Any Finalled or Inactive Accounts
- Any Deceased Accounts
- Any Priority Service Customers with Dementia
- Any Accounts where the Research Preference Code = N (opted out of market research)
- Any single tariff accounts – these are water or wastewater only accounts (in line with the Affordability and Acceptability Guidance, this exclusion was agreed through the Ofwat/CCW Acceptability and Affordability Testing query process, ref 59).

No quotas were set (in line with the Ofwat and CCW guidance).

Household (HH) Fieldwork

An initial sample was drawn from the universe, based on a much more optimistic response rate (8%), to ensure we did not invite more participants than was necessary. The proportions by IMD decile as defined above, were maintained. Records with an email address were sent a single email, records without, a letter. Responses to this mailing follow:

Initial Mailing			
IMD Decile	Sampled	email	postal
1	3267	1878	1389
2	1852	1109	742
3	1309	797	512
4	1116	688	428
5	891	543	347
6	802	492	310
7	818	498	320
8	909	554	355
9	659	402	257
10	562	350	212
Unknown	314	171	143
TOTAL	12500	7484	5016
IAs after initial mailing	727	523	204
Conversion rate after initial mailing	5.82%	6.99%	4.07%

It was assessed that to reach the target of 1000 interviews, a reminder would be required. Reminders were drawn in the same IMD proportions as used throughout, and the split between postal and email maintained at the proportions naturally evident in the sample. Responses to this initial reminder were:

Initial Reminder			
IMD Decile	Sampled	email	postal
1	1636	940	695
2	927	555	372
3	655	399	256
4	559	344	214
5	446	272	174
6	402	246	155
7	410	249	160
8	455	278	178
9	330	201	129
10	281	175	106
Unknown	157	86	72
TOTAL	6259	3747	2512
IAs after initial Reminder	224	136	88
Conversion rate after initial mailing	3.58%	3.63%	3.50%
Running total Interviews	951	659	292
Conversion Rate so far	7.61%	8.81%	5.82%

This initial reminder left us c50 interviews short, so a second initial reminder (i.e. a first reminder to participants who had not been included in the initial reminder) was sent to complete the fieldwork. Due to time pressures it was not possible to send any postal reminders so this small final reminder (accounting for c5% of interviews) was sent to email households only.

Initial Reminder #2			
IMD Decile	Sampled	email	postal
1	418	418	0
2	237	237	0
3	168	168	0
4	143	143	0
5	114	114	0
6	103	103	0
7	105	105	0
8	116	116	0
9	85	85	0
10	72	72	0
Unknown	45	45	0
TOTAL	1605	1605	0
IA's from 2nd initial Reminder *	102	84	18
Conversion rate of intitial reminder #2	6.36%	5.23%	
Running total (& final) Interviews	1053	743	310
Conversion Rate Overall	8.42%	9.93%	6.18%
* = 18 additional postal responses were received at fieldwork end. These were paper versions, requested by participants.			

Non Household (NHH) sampling and fieldwork

A target of 200 Non-household interviews was set². NHH bill-payers were recruited from a mix of sample sources, and interviewed by a variety of means:

Commercial panel (online):

Quest Mindshare was used for this component, and a total of 143 interviews were obtained via this method.

Purchased business lists (CATI):

Sample of appropriate businesses was purchased from Sample Answers. Participants were contacted by phone, and recruited to take part. All participants viewed materials (including the bill graph and service enhancement slides) at the time of interview. 20 interviews were achieved via this means. Sample statistics follow:

² The minimum NHH sample size listed in the guidance was 200.

No. In Sample	Exhausted	Still Live	Unused	Recruited (inc. Lost)	Interviewed
3547	685	2862	292	31	20

Retailer customer databases (online):

Water Plus kindly agreed to approach customers on behalf of Accent and United Utilities, by email. Water Plus sent 4250 emails, and 48 interviews were achieved by this means (1.13% response rate). In addition, Wave and Everflow agreed to Accent using their customer lists to approach customers by email. 760 emails were sent, generating 18 interviews (2.37% response rate).

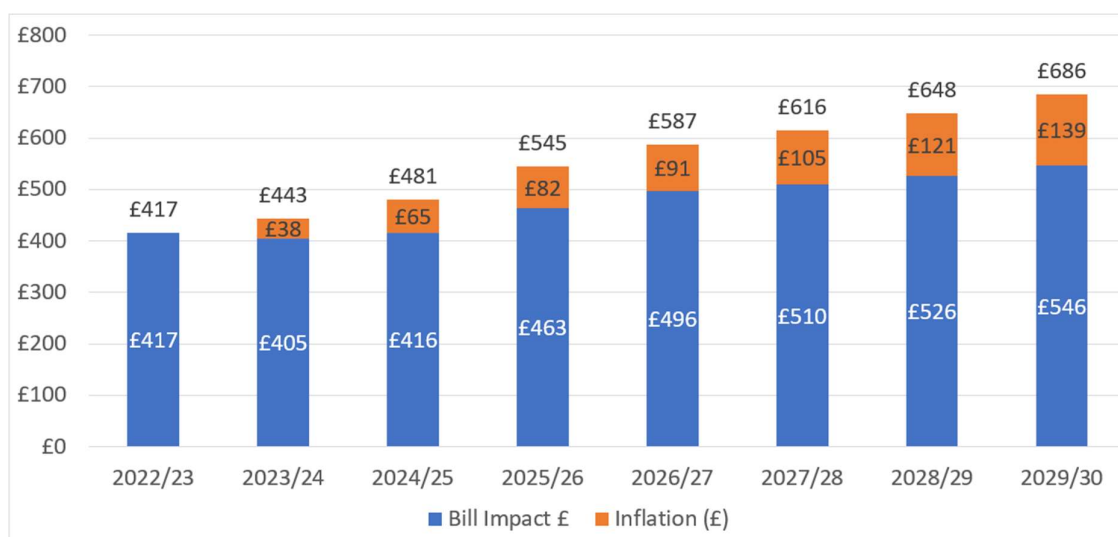
Thus, 229 NHH interviews were conducted.

Survey

The questionnaire itself was generally tightly prescribed and in the main was implemented precisely as mandated.

The exception to this, was the bill chart graph, where following cognitive feedback it was decided that it would benefit comprehension if a total (of bill impact plus inflation) were added above each bar on the graph showing the impact of the plan on bills. This was added with the approval of United Utilities' Independent Challenge Group, YourVoice.

An example (based on the average bill amount, and showing the actual increases tested):



3.4 Fieldwork dates

Household and Non-Household interviews took place simultaneously. Fieldwork commenced on the 14th of July 2023 and closed on the 17th of August.

3.5 Data processing

Once fieldwork was completed, the resulting dataset was cleaned to remove poor quality responses (including speeders, straight liners, multiple responses from the same IP address and those providing poor quality verbatim).

As mandated by Ofwat, data was checked to ensure that no interview was completed in a time of less than 1/3 of the median interview duration.

Weighting

SPSS was used to run RIM weighting (Random Iterative Methods, or “Raking”).

HH survey responses were weighted to the following targets:

Age		IMD Decile		Gender		UU region	
18-29	7%	1	21.96%	Female	51%	Cumbria	7%
30-39	16%	2	12.46%	Male	49%	Merseyside	21%
40-49	16%	3	10.01%			Greater Manchester	38%
50-59	19%	4	8.53%			Lancashire	20%
60-69	16%	5	7.48%			Cheshire	14%
70+	26%	6	6.74%				
		7	7.64%				
		8	8.50%				
		9	7.41%				
		10	6.31%				
		Unknown	2.96%				

NHH survey responses were weighted to the following targets (using BEIS (2022) data on regional employment size distributions):

Employees	
Sole Trader	15%
1-49 Employees	35%
50-249 Employees	15%
250+	35%

HH and NHH data were merged, weighted according to total consumption (73% HH, 27% NHH), to form the final dataset.

4 FINDINGS

4.1 Introduction

The following section of this report details the findings of the study.

4.2 HH Demographics

1,053 United Utilities customers took part in the Affordability and Acceptability Testing research. 743 have responded to our email invitation and 310 to our postal invitations. This is how their profiles fell out (pre-weighting). Percentages may not add up to 100 due to rounding.

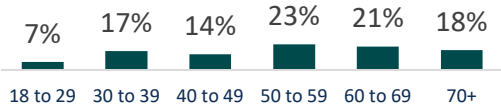
Gender



Female 47% **Male 51%**

1% identify in another way
1% prefer not to say
Census = 51% female, 49% male

Age



Census = 19% 18-29, 57% 30-64, 24% 65+.

Social Grade

AB	30%
C1C2	38%
DE	21%
Not stated	10%

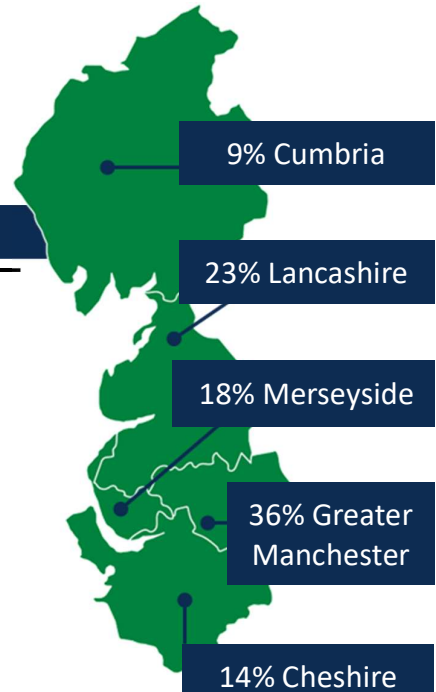
Census = 20% AB/52% C1C2/29% DE.

Ethnicity

English, Welsh, Scottish, Northern Irish or British	85%
Irish	1%
Any other White background	3%
White and Black Caribbean	1%
Indian	2%
Pakistani	2%
Any other Asian background	1%
African	1%
Any other ethnic group	1%
Prefer not to say	3%

Census = 90% white/6% Asian/2% mixed/1% black.

Region



IMD decile

1	17%
2	14%
3	12%
4	9%
5	7%
6	8%
7	7%
8	11%
9	6%
10	6%
Unknown	2%

Vulnerability ^

... is disabled or suffer(s) from a debilitating illness	20%
... have/has a learning difficulty	5%
... relies on water for medical reasons	7%
... is visually impaired	2%
... am/is over the age of 75 years old	10%
... speaks English as a second language	5%
... is deaf or hard of hearing	9%
... is a new parent	4%
None of these apply to me	53%
Prefer not to say	4%

^ Throughout this report a vulnerable household is defined as any household that has selected at least one of the options at this question. Q42 Which of the following apply to you?

4.3 NHH Demographics

229 United Utilities business customers took part in the Affordability and Acceptability Testing research. 143 were reached through specialised business panel, 20 through CATI and 66 through retailers. This is how their profiles fell out.

Main use of water on premises

For normal domestic of s customers and employees	76%
For the supply of services your organisation provides	31%
For an ingredient or part of the product or service your organisation provides	17%
For the manufacturing process, essential to the running of your organisation	15%
None of the above	3%
Don't know	1%

Number of business sites

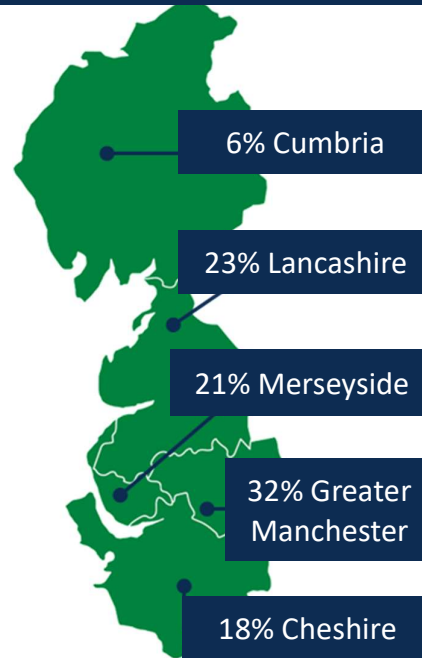
1	54%
2	11%
3	7%
4	3%
5 to 10	11%
11 to 50	6%
51 to 250	4%
250	3%
Prefer not to say	1%

Number of employees

0 (sole trader)	13%
1 to 9 employees (micro)	24%
10 to 49 employees (small)	22%
50 to 249 employees (medium)	18%
250+ employees (large)	21%
Prefer not to say	2%

Percentages may not add up to 100 due to rounding.

Region



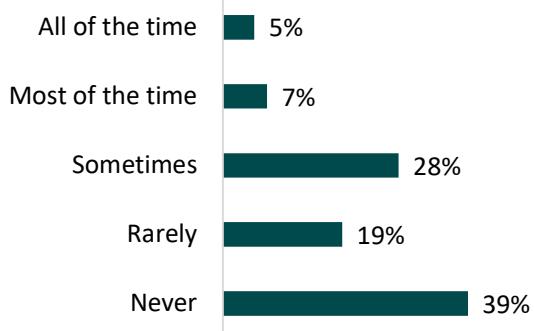
Industry

Wholesale and retail trade	13%
Manufacturing	9%
Construction	9%
Hotels & catering	9%
Education	8%
IT and Communication	5%
Arts, entertainment and recreation	5%
Agriculture, forestry and fishing	4%
Transport and storage	4%
Finance and insurance activities	4%
Professional, scientific and technical activities	4%
Human health and social work activities	4%
Energy or water service & supply	2%
Real estate activities	2%
Administrative and Support Service Activities	2%
Public administration and defence	2%
Other service activities	3%
Other	10%
Prefer not to say	2%

4.4 HH Financial Temperature Check

- Close to 2 in 5 (39%) of those we spoke to say they never struggle to pay their bill; however the same number of people struggle at least sometimes (40%).
- Those encountering the greatest challenges appear to be individuals between the ages of 30 and 49, with 51% in the 30-39 age group and 54% in the 40-49 age group expressing struggles.
- 48% of households with vulnerable members say they struggle to pay at least sometimes, this is significantly higher than households without vulnerable members (32%)
 - When looking at vulnerability by type we find those classed as medical (50%) or communication (50%) vulnerable are significantly more likely to struggle than those classed as vulnerable because their stage of life (32%)
- 48% of those living in Cheshire say they never struggle to pay their bill, this is significantly higher compared to those living in Lancashire (33%)

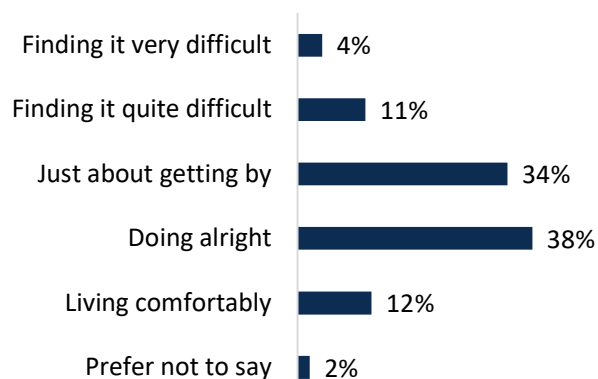
Figure 1. Q9 Thinking about your finances over the last year, how often, if at all, has your household struggled to pay at least one of its bills.



Base: All HH participants (936)

- Almost half (49%) are also finding it difficult to manage financially or are just about getting by.
 - The highest proportion of those saying they are living comfortably or doing alright are aged 70+ (64%).

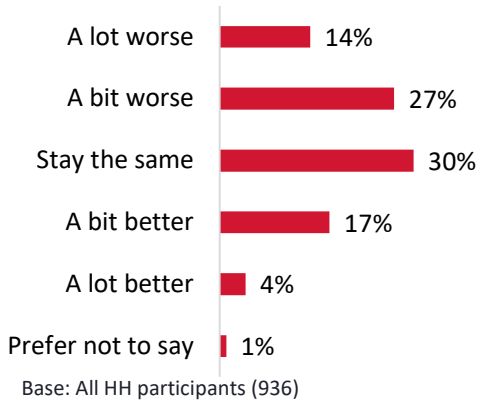
Figure 2. Q10 Overall, how well would you say you are managing financially now?



Base: All HH participants (936)

- Out of every 5 households, 2 (41%) anticipate a decline in their financial circumstances in the coming years.
 - This increases to 55% among those already struggling financially (those finding it very or quite difficult to manage financially), which is significantly higher compared to the 40% that are not struggling at the moment.
- The anticipation of positive change diminishes as age increases:
 - Individuals in the younger age brackets maintain a more optimistic outlook, foreseeing an enhancement in their situations. Conversely, those in older age groups expect a deterioration. (Overall, 35% for 18-29; 27% for 30-39; 29% for 40-49; 22% for 50-59; 20% for 60-69; and 9% for 70+ expect improvement).
 - While younger participants are hopeful about their future improving, a significant portion also foresees a decline (47%). They rank second only to the 50-59 age group in this aspect.

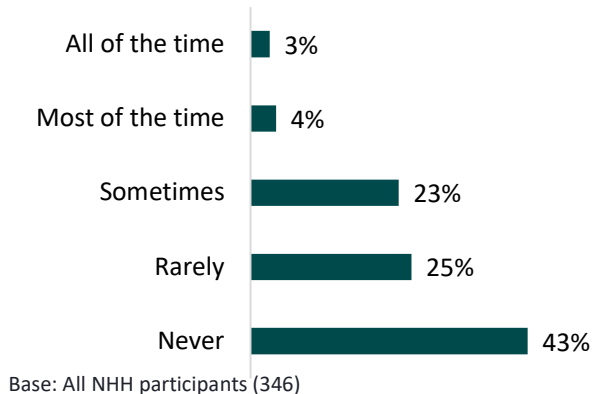
Figure 3 Q11 Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get?



4.5 NHH Financial Temperature Check

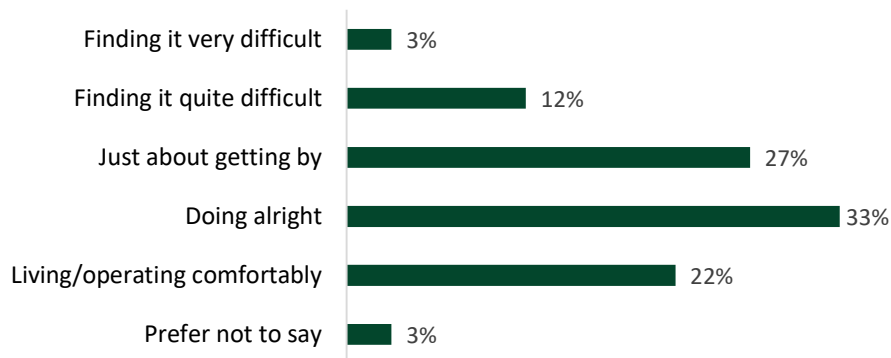
- Over 2 in 5 (43%) businesses say they never struggle to pay their bills but close to a third do have some difficulties (30%)

Figure 4. Q9 Thinking about your finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills?



- 42% of businesses are operating with financial difficulty, with almost a quarter (22%) saying they are operating comfortably.

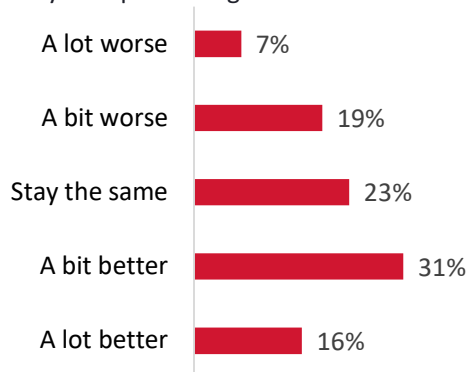
Figure 5. Q10 Overall, how well would you say your organisation is managing financially now?



Base: All NHH participants (346)

- Almost half the businesses (47%) of businesses expect their financial situation to improve in the years to come and only a quarter expect it to worsen.
- The highest percentage of businesses that say they are expecting their financial situation to stay the same is in Lancashire (41%) and this is significantly higher than those in the Greater Manchester area (15%).

Figure 6 Q11 Thinking about your organisation’s financial situation over the next few years up to 2030, do you expect it to get:



Base: All NHH participants (346)

4.6 Affordability

Affordability of the plan was low – with just 19% of participants saying the bill increases would be very or fairly easy to afford.

4.7 HH Affordability

- Slightly more than 2 out of 5 (42%) of United Utilities customers stated that paying their current water and sewerage bill is either very or fairly easy. However, this percentage declined to 14% when asked to consider the future bills associated with the business plan.
 - A greater proportion of individuals under 40 are prone to encountering difficulties with forthcoming bills (52% for 19-29; 63% for 30-49), in contrast to those aged over 70 (33%).
 - Females exhibit a notably higher likelihood of grappling with this impending rise (56%) compared to males (44%).
- 54% of those that are struggling financially (those finding it very or quite difficult to manage financially) say they find the current bill very or fairly difficult to pay. This increases to 86% when thinking about the 2025-30 bill.

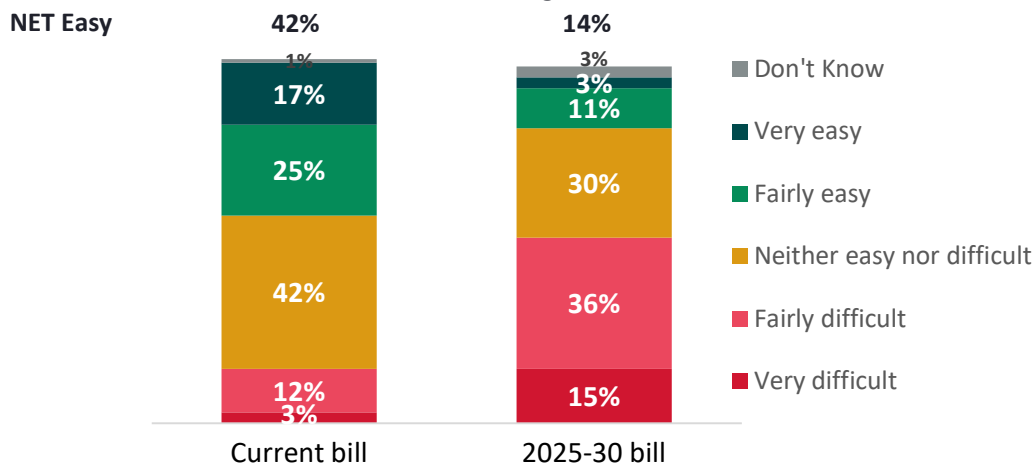


Figure 6. Q13 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All HH participants (936)

- As expected, affordability of the future bill will become more problematic for those on the lower end of the income scale. Specifically difficult for those earning under £16,000 (68%). These households are significantly more likely to find their future bills fairly/very difficult to afford compared to any household earning over £52,000.
 - The percentage of participants saying that they would find their bill Very difficult to afford decreased almost in a linear manner with the increase of income, however it spiked again among those earning £26,000-£36,399.

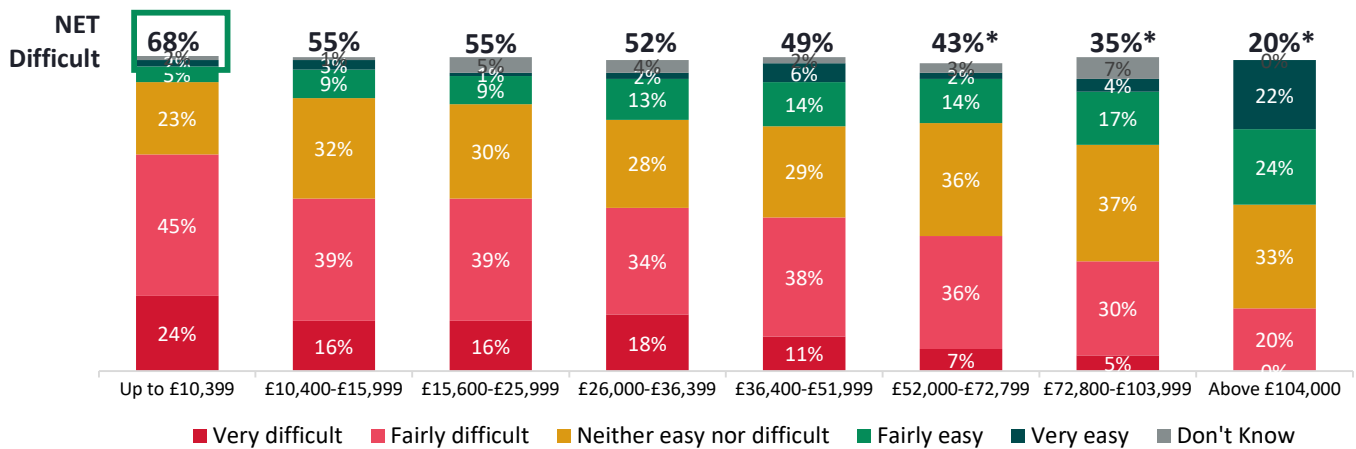


Figure 7. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? All HH participants (936)

 Denotes significantly higher than *

- Perceived affordability of the proposed bill increase is significantly higher among those customers that have a water meter compared to those that don't. 18% of those with a water meter say they would find it easy to pay the bill in the future compared to 10% of those that currently don't have a meter – this is perhaps influenced by the sense of control that having a meter gives.

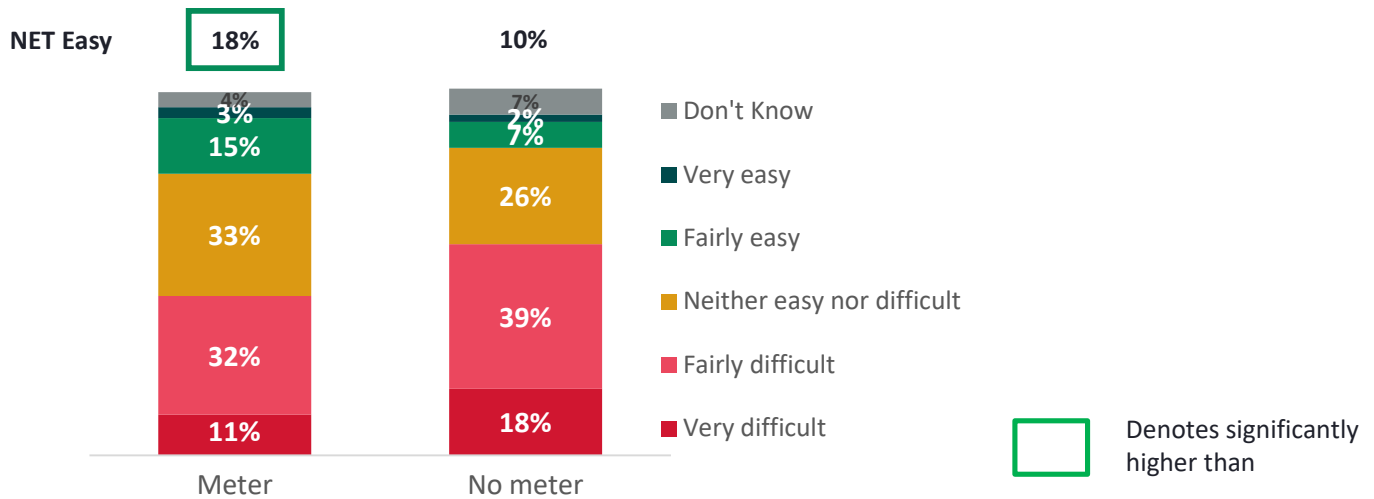


Figure 8. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?

Base: All HH with meters (477) and HH with no meter (420)

- Affordability is lower among households that have vulnerable members, at 12% (net very/fairly easy) compared to households without vulnerable members at 16%.
- These households are significantly more likely to find these bills fairly/very difficult to pay (53%) than those without a vulnerable member (43%).
- When looking at vulnerability by type* we see those that are considered vulnerable for medical reasons are significantly more likely to say they will find these bills fairly/very difficult (62%) compared to those considered vulnerable because of communication (53%) or life stage (43%).

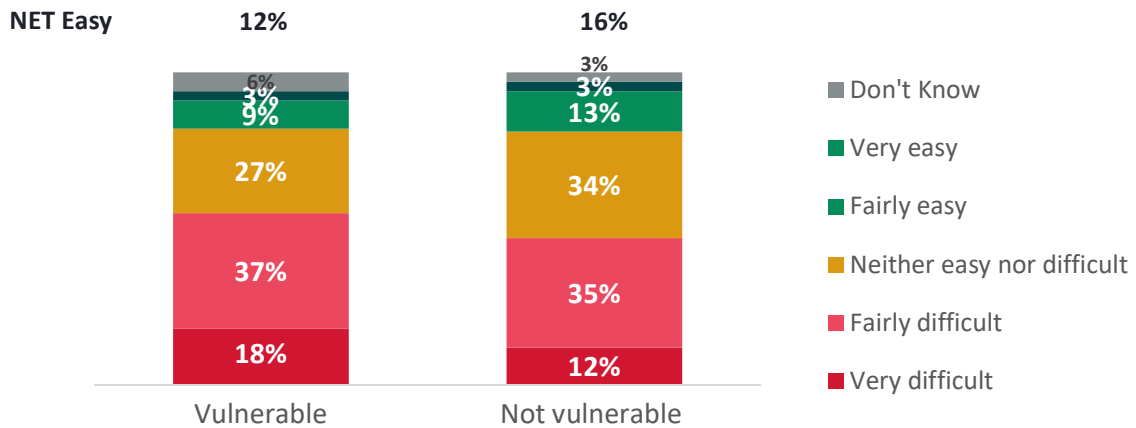


Figure 9. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All HH with vulnerable members (428) and HH with no vulnerable members (468)
 *Details of conditions listed under each vulnerability can be found in Appendix E.

4.8 NHH Affordability

- Affordability is higher among the NHH population compared to HH.
- Almost half of businesses (47%) find their bills easy or very easy to afford. This however drops down to 33% when thinking about the future bill.

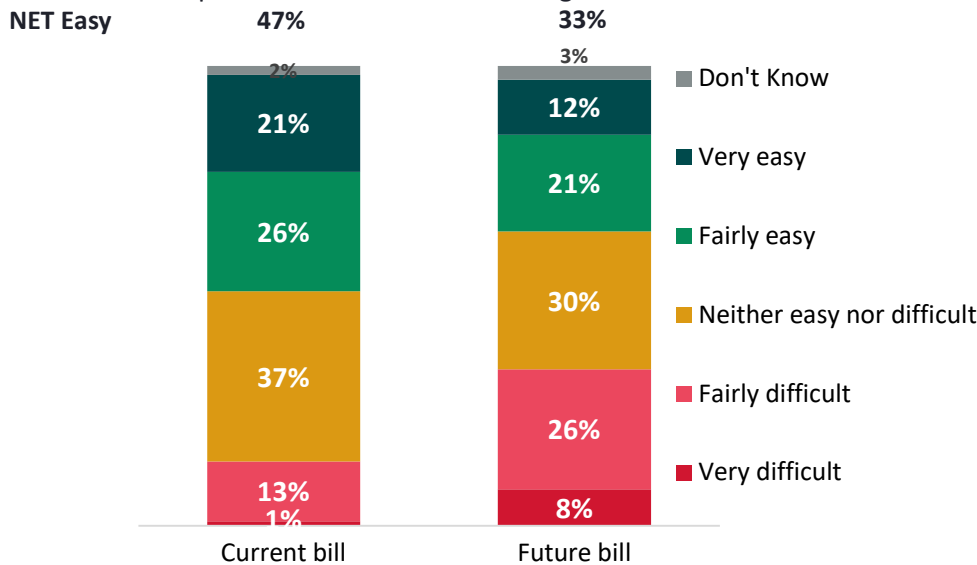


Figure 10. Q13 How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills? Base: All NHH participants (346)

- Unlike HH participants, un-metered businesses seemed more resilient to bill increases.
- Even though non-metered businesses seem more resilient than metered ones, the difference is not significant.

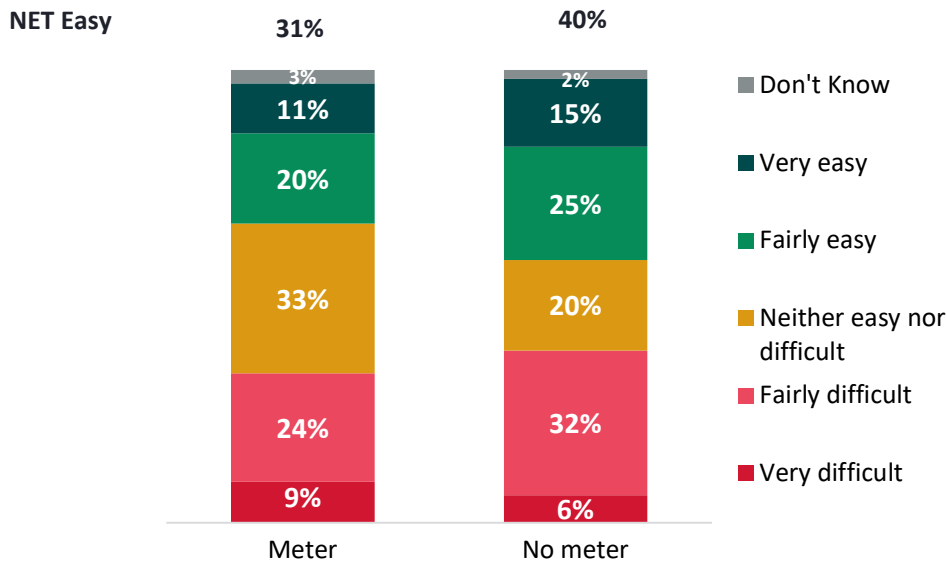


Figure 11. Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills? Base: All NHH with a meter (252) NHH without a meter (88)

4.9 Acceptability

Acceptability of the plan was much higher than affordability – 75% overall.

4.10 HH Acceptability

- Close to three quarters (70%) of United Utilities customers we spoke to found the proposed plan acceptable.
 - Acceptability figures were broadly consistent among different age groups with no significant differences.
 - The business plan is more acceptable to participants that were invited to take part via email (73%) than via postal letter (65%), the differences was significant.

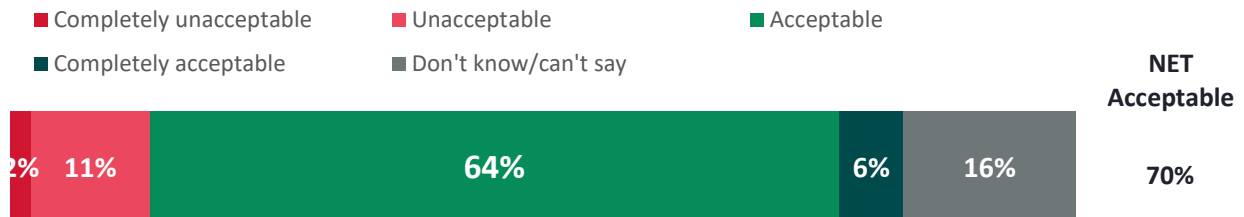


Figure 12. Q29 Based on everything you have seen and read about United Utilities' proposed business plan, how acceptable or unacceptable is it to you? Base: All HH participants (936)

Reasons for unacceptability

- Perhaps unsurprisingly given the recent coverage in the media, customers have chosen company profits as their top reason for unacceptability (35%), alongside the size of the bill increases.
- They are followed by the expectation for companies to pay for these improvements themselves (27%) and the lack of trust in the company to deliver these services (26%).

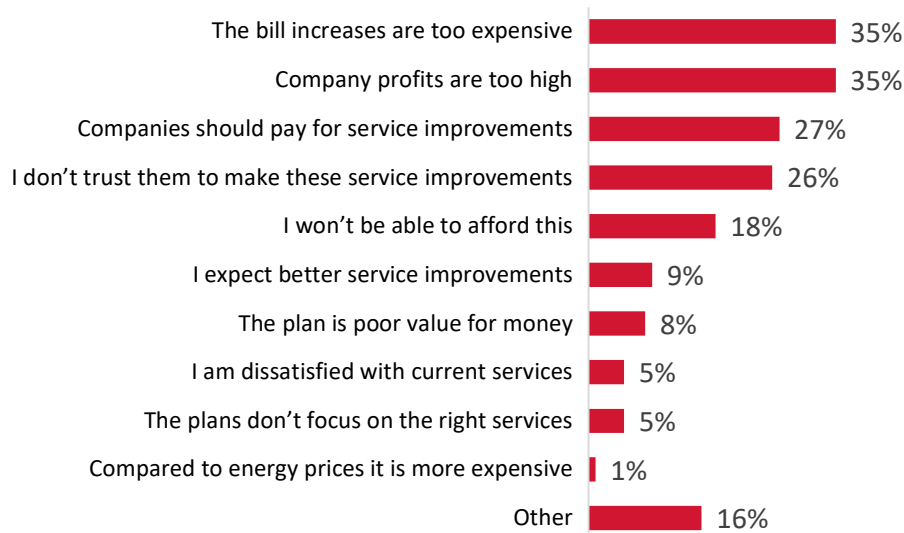


Figure 13. Q30. What are the two main reasons that you feel the proposals for your water services are unacceptable? Base: All HH respondents that felt proposals were unacceptable (124)

Reasons for acceptability

- Customers that found the plan acceptable, support what United Utilities is trying to do long term (59%), feel like United Utility's plans are focusing on the right services (42%) and they are doing what is best for their customers (22%).

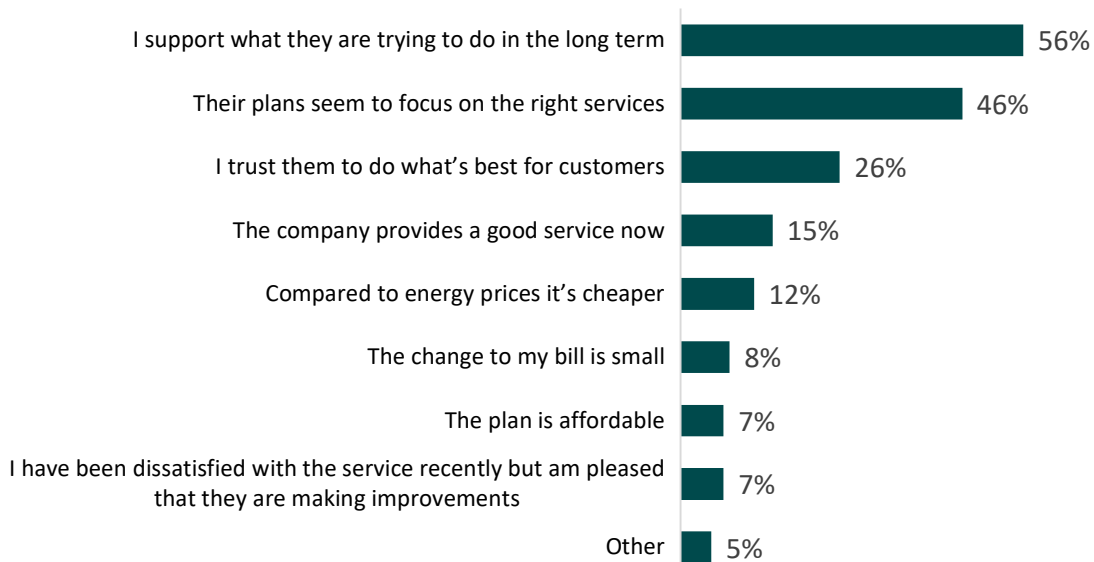


Figure 14 Q31. What are the two main reasons that you feel the proposals for your water supply are acceptable? Base: All HH respondents that felt proposals were acceptable (659)

4.11 NHH Acceptability

- Acceptability is higher among NHH compared to HH. 86% of the businesses we spoke to, found the proposed business plan acceptable.
 - Acceptability was high even among businesses that currently are struggling with their bills (86%).

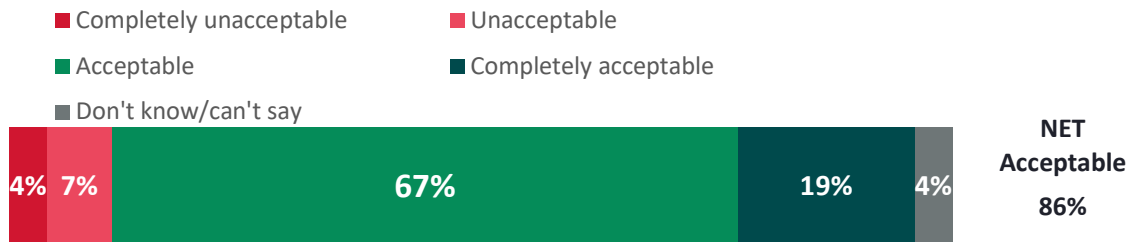


Figure 15. Q29 Based on everything you have seen and read about United Utilities' proposed business plan, how acceptable or unacceptable is it to you? Base: All NHH participants (346)

Reasons for unacceptability

- Only 11% of NHH participants (n=24 unweighted base) felt the proposed plan was unacceptable. This base is too low and not robust enough to be reported on in a meaningful way.

Reasons for acceptability

- Similar to HH customers, business customers find the plan acceptable and support what United Utilities is trying to do long term (49%), feel like United Utility's plans are focusing on the right services (46%) and they are doing what is best for their customers (22%)

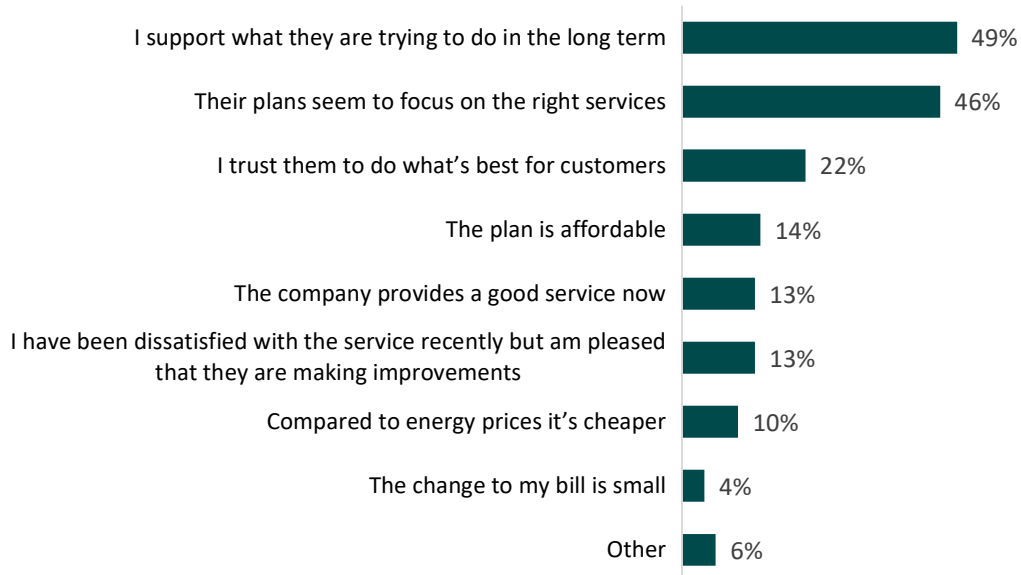


Figure 17 Q31. What are the two main reasons that you feel the proposals for your water supply are acceptable? Base: All NHH respondents that felt proposals were unacceptable (297)

4.12 Intergenerational Phasing

- Businesses seem more reluctant than Household customers for the price increases to be put onto future customers.
 - Almost half (48%) of household customers were unable or unwilling to answer the question compared to only 36% of businesses.
 - A significantly higher proportion of females (51%) compared to males (37%) said they don't know.
- For both businesses and household customers, the preferred phasing option amongst those able to choose was for an immediate increase in bills rather than a delay (mirroring the findings of the qualitative phase of this A&AT study, and United Utilities' Long Term Delivery Strategy research).

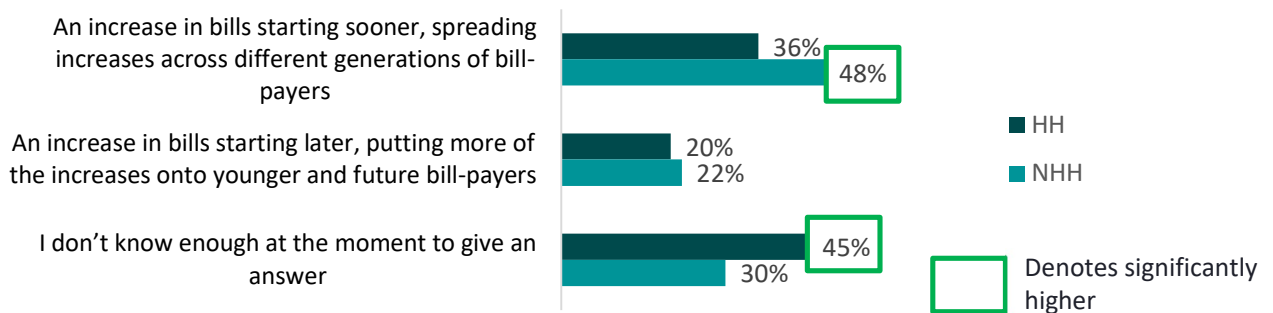


Figure 17 Q32. Long term investment by United Utilities will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?
Base: All HH participants (936) and all NHH participants (346)

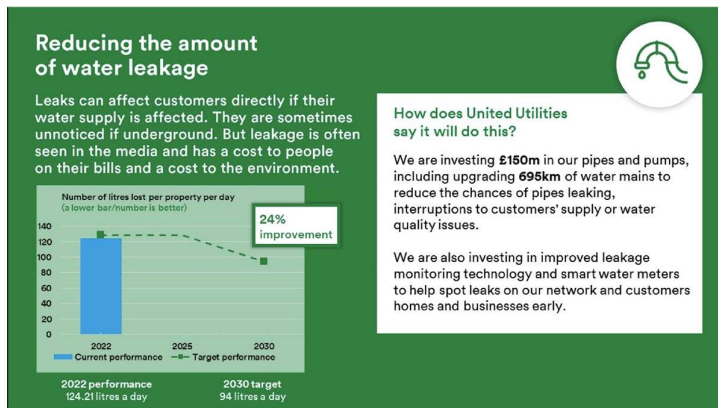
4.13 Performance commitments

There has been a real engagement from both household and non-household customers with the performance commitments as the majority have been able to choose an option at these questions.

Participants were shown the performance commitments in two banks of three (water, and waste) and asked to pick which is most important to them. Details follow:

Water Related

- Preventing leaks was chosen as the most important performance commitment by household customers.
 - Preventing leaks is significantly more important to those aged 60+ than to those aged under 50.
 - The quality of water is most important to those aged under 50, but highest for 18-29 (52%), significantly higher compared to those aged 50+ (27%).
- Reducing leaks was also named as most important by NHH customers.
 - Reducing the length of interruptions was ranked second and was significantly more important for businesses than households – perhaps unsurprisingly as so many rely on water to operate.



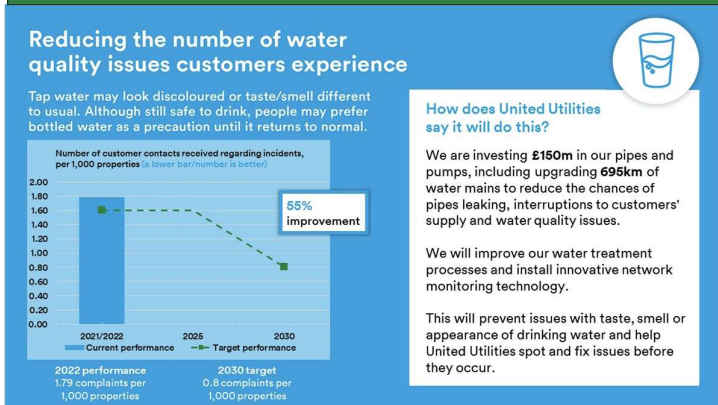
Reducing leakage

HH

NHH

48%

45%



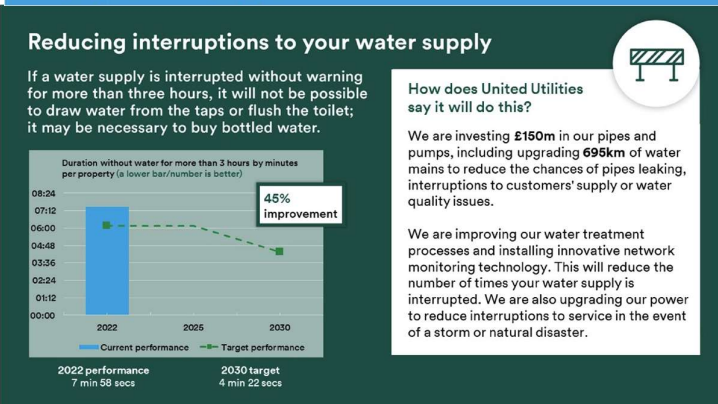
Reducing the number of water quality issues

HH

NHH

35%

24%



Reducing interruptions to your water supply

HH

NHH

11%

27%

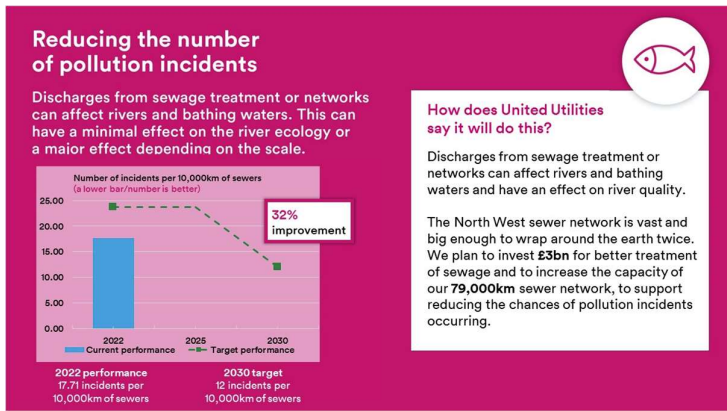
Don't know/ can't say: 6% HH; 3% NHH

Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you? Base: All HH participants (936) and all NHH participants (346)

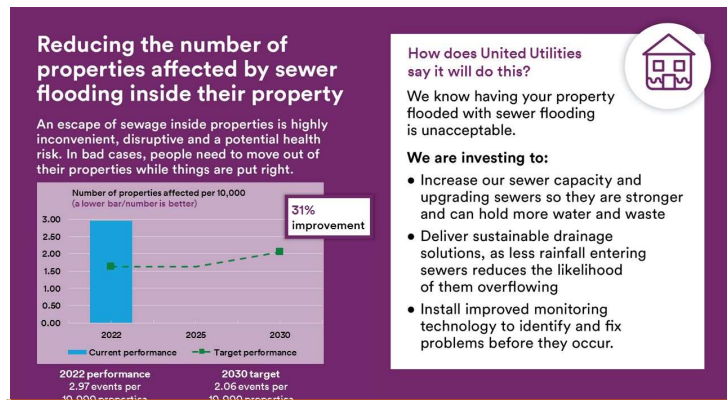
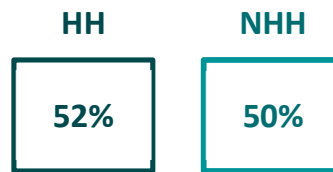
Denotes significantly higher

Sewerage and Pollution Related

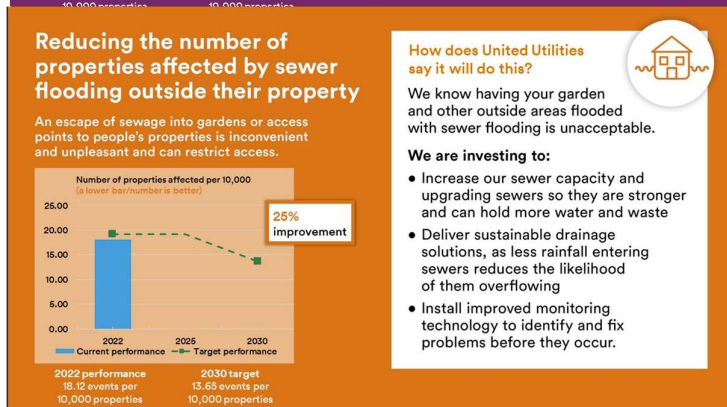
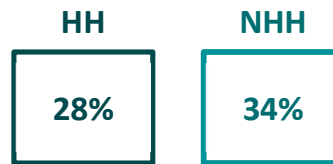
- Preventing the number of pollution incidents is the most important performance commitment for household customers from this bank.
 - Reducing the number of pollution incidents is equally important for both HH and NHH customers.
 - 60% of participants aged over 60 concerned about reducing the number of pollution incidents, this is significantly higher than those aged under 40.
- Reducing the number of pollution incidents is also at the top of the list for NHH customers, but this is very closely followed by reducing the number of floods inside properties



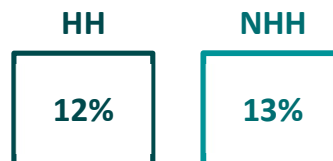
Reducing the number of pollution incidents



Reducing flooding inside properties



Reducing flooding outside properties



Don't know/ can't say: 7% HH; 2% NHH

Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you? Base: All HH participants (936) and all NHH participants (346)

4.14 Enhancement cases

There has been a notable engagement from participants with the enhancement cases of the business plan evidenced by only 5% of HH and 2% of NHH customer not being able to make a decision.

- Given the continued cost of living crisis it is not surprising to see that the Affordability Support enhancement has had the most backing from household (51%) and business (44%) customer alike.
 - Affordability support was rated most important by 62% of those aged 30-39. This is the highest among any age group and it is significantly so compared to over 70s (39%).
 - This was also significantly more important to females (55%) than to males (47%), and those in SEG DE (65%) compared to the other social grades.
- The effects of climate change have become more apparent in the recent years, so it is perhaps unsurprising that both household and business customers have chosen Carbon Reduction as their second enhancement. Both household and non-household customers shared similar support for this part of the business plan.
 - Around a quarter of businesses (25%) have chosen this compared to 22% of household customers – The slightly higher percentage in non-household group can perhaps be explained by the fact that all businesses are working to reduce their carbon footprint to reach the NET Zero deadline by 2050.
- Just over 1 in 10 of household and business participants chose smart meters as their priority.
 - The value of a smart meter is more apparent amongst those that already hold a water meter. A significantly higher proportion of meter holders (16%) have chosen this, compared to those that don't have a meter (7%).
 - Younger age group (under 29) also showed higher support for this area, with 23% selecting this option – significantly higher than all other age groups.
- Hose-pipe bans were not considered as important to participants as the other enhancement cases.
 - They did appeal more to males (14%) compare to females (8%) and to those ages 70+ (17%)

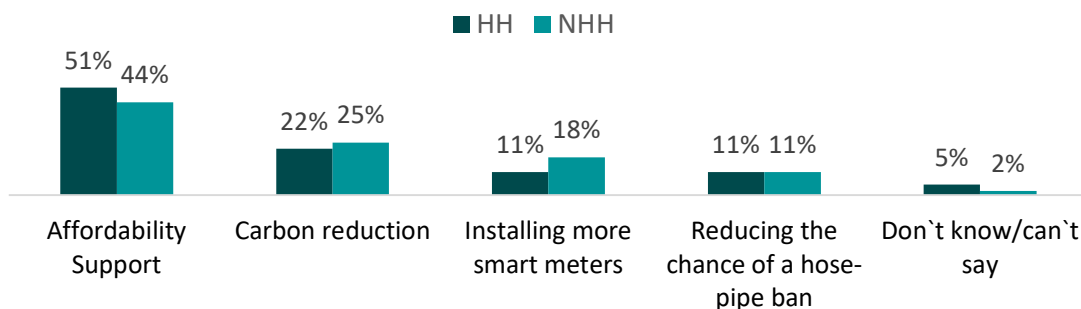


Figure 18. Q28. Based on what you have just read, which of these four parts of the business plan is the most important to you? Base: All HH participants (936) and all NHH participants (346)
No significant differences have been noted at a regional level for choice of performance commitments or additional enhancement cases.

APPENDIX A

Adherence to Ofwat's standards for high quality customer research

Requirement	How the study has adhered
<ul style="list-style-type: none"> ■ Useful and contextualised 	<p>Research objectives aligned to PR24 and undertaken in accordance with Ofwat & CCW's published guidance. This research was conducted in order to test customer perceptions of the acceptability and affordability of United Utilities' revised business plan for 2025-2030 and will be used by United Utilities to shape the final business plan</p>
<ul style="list-style-type: none"> ■ Neutrally designed 	<p>Outside of the prescribed Ofwat guidance, every effort has been made to ensure that the research is neutral and free from bias. All elements of design were checked and challenged by United Utilities' ICG, YourVoice. Where there is the potential for bias, this has been acknowledged in the report.</p>
<ul style="list-style-type: none"> ■ Fit for purpose 	<p>Research undertaken in accordance with Ofwat & CCW's published guidance. Cognitive testing was carried out to ensure the complex subject matter was presented in the questionnaire in a way which was as understandable and engaging as possible for respondents. Visual stimulus was created in order to aid participant understanding of the proposed plan.</p>
<ul style="list-style-type: none"> ■ Inclusive 	<p>Household and business customers were represented. Lower IMD deciles were over-sampled and higher IMD deciles under-sampled, to compensate for lower response rates. The response rates were monitored across a range of demographics to ensure representation, although the prescribed methodology prevents any interventions in this regard. Accommodation was made for any accessibility requests (including paper/postal versions, large print, high contrast print), via a freephone number.</p>
<ul style="list-style-type: none"> ■ Continual 	<p>This research builds on the foundation of the qualitative work and contributes towards the ongoing development of policy and plans.</p>
<ul style="list-style-type: none"> ■ Independently assured 	<p>All research was conducted by Accent, an independent market research agency. United Utilities collaborated with Your Voice, the Independent Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings. Third line assurance by Turner and Townsend</p>
<ul style="list-style-type: none"> ■ Shared in full with others 	<p>The research will be published and shared on the United Utilities website and through United Utilities' industry customer insight newsletter, The Source.</p>
<ul style="list-style-type: none"> ■ Ethical 	<p>Research conducted in accordance with the Market Research Society code of conduct and conforming to the requirements of ISO 20252:2019. Accent and United Utilities were subject to strict data protection protocols.</p>

APPENDIX B

Additional Information

The following information on **Quantitative** work is available upon request:

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews, synchronous or asynchronous),
- The target group and sample selection methods,
- Assessment of sample representation of target population and respective implications,
- The sampling method, including size of planned and achieved sample, reasons for differences in planned and achieved and how any problems in this respect were dealt with,
- Response rate where probability samples were used and its definition and calculation method,
- Participation rate where non-probability samples were used,
- The number of interviewers or moderators, if applicable,
- The fieldworker/moderator validation methods, if applicable,
- The questionnaires, any visual exhibits or show cards, and other relevant data collection documents,
- The weighting procedures, if applicable,
- Any methods statistical analysis used,
- The estimating and imputation procedures, if applicable,
- The results that are based on subgroups and the number of cases used in subgroup analysis,
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used).

APPENDIX C

Limitations

Limitation	Impact
Small NHH sample size has resulted in some subset analysis not being possible	Analysis into (for example) non-acceptability of the plan amongst NHH participants, was not possible.
Recruiting NHH participants via CATI proved challenging	A low percentage of the NHH sample consists of CATI participants.
Small NHH participants are unlikely to be in scope (either by not having a dedicated business water supply, or by being in serviced offices with inclusive water)	The NHH sample is skewed towards larger organisations.

APPENDIX D

Fieldwork Materials

Invitation letter

The Occupier
Address



Accent

3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: nnnn

Dear Sir/Madam

Water services research: complete a survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of United Utilities, the organisation which supplies water and sewerage for customers in North West England.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help United Utilities plan investment in their service from 2025 and will influence your future water services and bills.

Anyone who is eligible to take part and completes the full 10 minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3606survey> and entering your Unique ID (XXXX) and PIN (nnnn).



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6590. You will be asked to leave your name and the 4 digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **16th August 2023**. United Utilities will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at UUResearch@accent-mr.com or 0800 099 6590.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



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

Email invite



Dear #name#

Water services research: complete a 15-minute online survey and receive a £10 voucher

This email has been sent to you by Accent (an independent market research company) on behalf of United Utilities, the organisation which supplies water and sewerage for customers in North West England.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help water companies plan investment in their service from 2025 and will influence your future water services and bills. The research is being conducted under the Market Research Society Code of Conduct, which means that any answers you give will be treated in confidence.

Anyone eligible, who completes the survey, will receive a £10 voucher (an Amazon voucher, an M&S voucher or a Love2Shop voucher). Alternatively we can donate your incentive to WaterAid. Details on how claim your voucher are given at the end of the survey.

Click here to check eligibility, and to take part.

(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [here](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **16th August 2023**. United Utilities will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions about the research, please do reach out to us at UUResearch@accent-mr.com or 0800 099 6590.

With best wishes,

Julian Hollo-Tas
Project Manager.



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

Reminder letter

The Occupier
Address



3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: nnnn

Dear Customer

Water services research: Still time to complete a 10 minute survey and receive a £10 voucher - REMINDER

This letter has been sent to you by Accent (an independent market research company) on behalf of United Utilities, the organisation which supplies water and sewerage for customers in North West England.

We are still looking for people to complete a survey about their views on water and sewerage services. The research will be used to help United Utilities plan investment in their service from 2025 and will influence your future water services and bills.

Anyone who is eligible to take part and completes the full 10 minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3606survey> and entering your Unique ID (XXXX) and PIN (nnnn).



The final date for us to receive completed surveys is **16th August 2023**. United Utilities will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at UUResearch@accent-mr.com or 0800 099 6590.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



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

Paper version cover

Name
Address



Accent

3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: nnnn

Dear Customer,

Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for United Utilities. Please find it attached. This pack should contain

- (1) This letter
- (2) A paper version of the survey
- (3) A reply envelope (pre-paid: no stamp required)

Anyone who is eligible to take part and completes the full 15 minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid.

How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate, and complete the survey online, by entering the following link or scanning the QR code: <https://acsvy.com/3606survey> and entering your Unique ID (XXXX) and PIN (nnnn).



Please note: the final date for us to receive completed surveys (including paper submissions) is Wednesday 16th August 2023.

If you have any questions, please don't hesitate to contact the research team at UUResearch@accent-mr.com or 0800 099 6590.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



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

APPENDIX E

Questionnaire (Online version)

Affordability and Acceptability Testing

Thank you very much for agreeing to complete this online survey which is being conducted by Accent, an independent research agency. This survey is designed to help United Utilities, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

NOT PANEL: Anyone completing the survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you?

OPEN TEXT RESPONSE BOX

Prefer not to say **THANK AND CLOSE**

DP PLEASE CODE INTO THE FOLLOWING:

UU- age

Under 18 **THANK AND CLOSE**

18-29

30-39

40-49

50-59

60-69

70+

Guidance age

Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

Prefer not to say **THANK AND CLOSE**

IF HH: Are you solely or jointly responsible for paying your household's water and sewerage bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

United Utilities is your water supplier, and is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

IF NHH: Is United Utilities responsible for the water and sewerage services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Q8A IF NHH: When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the United Utilities area. Is that OK?

Yes

No **THANK AND CLOSE**

Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Affordability

We are now going to ask you some questions about your **[IF HH]** household's/**[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- [IF HH]** Living/**[IF NHH]** Operating comfortably
- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your **[IF HH]** household's/ **[IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- Please select one answer only*
- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

IF NHH: How much are you currently paying for your water and sewerage services bill, each year?

- [Open-ended answer] **DP PLEASE ADD TEXT BOX**
- Don't know

How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- Please select one answer only*
- Very easy

Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

Q13A **IF NHH**: In order for us to move on I would now like you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans United Utilities have.

Please could you go to <HTTPS://acsvy.com/3606>

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the United Utilities area. An estimate is absolutely fine.

Interviewer note, do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

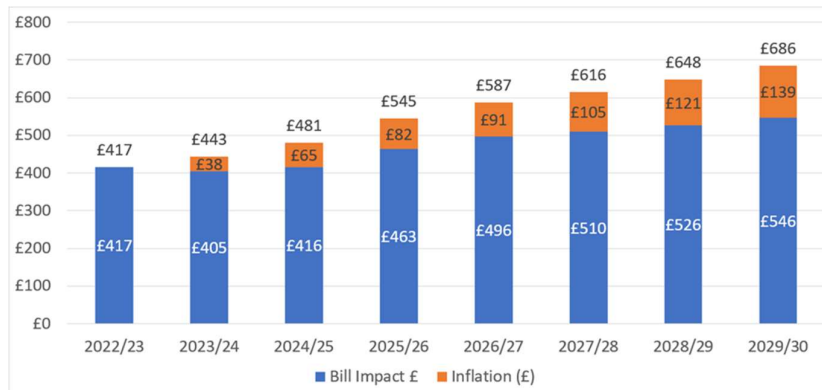
- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
 - If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
 - If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.
- The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



IF Social Tariff Customer (from sample): This bill profile is based on the financial support scheme you are currently on.

How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO Q15**
- Fairly difficult **HH ONLY GO TO Q15**
- Very difficult **HH ONLY GO TO Q15**
- Don't know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**
- Don't know

Acceptability

Thank you. We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

Unplanned Water Supply Interruptions.

The following chart shows how United Utilities are performing on the length of time properties are without water, against both their target and also the other water companies.

Water companies measured on the length of time properties are without water

Duration without water for more than 3 hours by minutes per property.
Companies with the lowest numbers perform better

United Utilities has not met its target for this metric last year

United Utilities are ranked 7th of 17 companies on this measure

Company	Performance
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance



Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing interruptions to your water supply

If a water supply is interrupted without warning for more than three hours, it will not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Duration without water for more than 3 hours by minutes per property (a lower bar/number is better)

2022 performance: 7 min 58 secs
2030 target: 4 min 22 secs

How does United Utilities say it will do this?

We are investing **£150m** in our pipes and pumps, including upgrading **695km** of water mains to reduce the chances of pipes leaking, interruptions to customers' supply or water quality issues.

We are improving our water treatment processes and installing innovative network monitoring technology. This will reduce the number of times your water supply is interrupted. We are also upgrading our power to reduce interruptions to service in the event of a storm or natural disaster.

Leakages

The following chart shows how United Utilities are performing on the amount of water lost due to leaks from water mains and pipes, against both their target and also the other water companies.

Water companies measured on the amount of water lost due to leaks from water mains and pipes

Number of litres lost per property per day

Companies with the lowest numbers perform better

United Utilities has met its target for this metric last year
United Utilities are ranked 16 th of 19 companies on this measure

Company	Performance
Bristol	65.04
Essex and Suffolk	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
South Staffs	113.45
Severn Trent	119.66
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	131.01
Thames	151.51
Welsh Water	158.8

Better performance ↑
↓ Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing the amount of water leakage

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Number of litres lost per property per day (a lower bar/number is better)

Year	Performance (litres a day)
2022 performance	124.21
2030 target	94

24% improvement

How does United Utilities say it will do this?

We are investing **£150m** in our pipes and pumps, including upgrading **695km** of water mains to reduce the chances of pipes leaking, interruptions to customers' supply or water quality issues.

We are also investing in improved leakage monitoring technology and smart water meters to help spot leaks on our network and customers homes and businesses early.

Water Quality Contacts

The following chart shows how United Utilities are performing on the number of customer contacts regarding the appearance, taste and smell of tap water, against both their target and also the other water companies.

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 customers.

Companies with the lowest numbers perform better

United Utilities has not met its target for this metric last year

United Utilities are ranked 16th of 17 companies on this measure

Company	Performance (number of contacts)
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38



The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of water quality issues customers experience

Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Year	Complaints per 1,000 properties
2021/2022 (Current performance)	1.79
2030 (Target performance)	0.8

55% improvement

How does United Utilities say it will do this?

We are investing **£150m** in our pipes and pumps, including upgrading **695km** of water mains to reduce the chances of pipes leaking, interruptions to customers' supply and water quality issues.

We will improve our water treatment processes and install innovative network monitoring technology.

This will prevent issues with taste, smell or appearance of drinking water and help United Utilities spot and fix issues before they occur.

Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water

Don't know/can't say

Internal Sewer Flooding

The following chart shows how United Utilities are performing on the incidents of sewage flooding properties, against both their target and also the other water companies.

Water companies measured on the incidents of sewage flooding properties

Number of properties affected, per 10,000.
Companies with the lowest numbers perform better

United Utilities has not met its target for this metric last year

United Utilities are ranked 9th of 11 companies on this measure

Company	Performance (number of properties affected)
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.98
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of properties affected by sewer flooding inside their property

An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

Year	Performance
2022	2.97 (Current performance)
2030	2.06 (Target performance)

31% improvement

2022 performance: 2.97 events per 10,000 properties
2030 target: 2.06 events per 10,000 properties

How does United Utilities say it will do this?

We know having your property flooded with sewer flooding is unacceptable.

We are investing to:

- Increase our sewer capacity and upgrading sewers so they are stronger and can hold more water and waste
- Deliver sustainable drainage solutions, as less rainfall entering sewers reduces the likelihood of them overflowing
- Install improved monitoring technology to identify and fix problems before they occur.

External Sewer Flooding

The following chart shows how United Utilities are on the incidents of sewage flooding gardens or outbuildings, against both their target and also the other water companies.



Water companies measured on the incidents of sewage flooding gardens or outbuildings

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

United Utilities has met its target for this metric last year
United Utilities are ranked 5 th of 11 companies on this measure

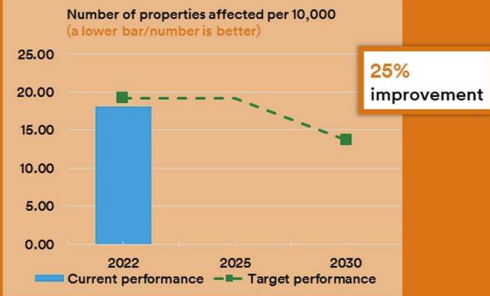
Company	Performance (number of properties affected)
Thames	9.4
Severn Trent	10.8
Anglian	14.55
South West	18.13
United Utilities	18.71
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

Better performance


Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of properties affected by sewer flooding outside their property

An escape of sewage into gardens or access points to people's properties is inconvenient and unpleasant and can restrict access.



Number of properties affected per 10,000 (a lower bar/number is better)


2022 performance	2030 target
18.12 events per 10,000 properties	13.65 events per 10,000 properties

How does United Utilities say it will do this?

We know having your garden and other outside areas flooded with sewer flooding is unacceptable.

We are investing to:

- Increase our sewer capacity and upgrading sewers so they are stronger and can hold more water and waste
- Deliver sustainable drainage solutions, as less rainfall entering sewers reduces the likelihood of them overflowing
- Install improved monitoring technology to identify and fix problems before they occur.

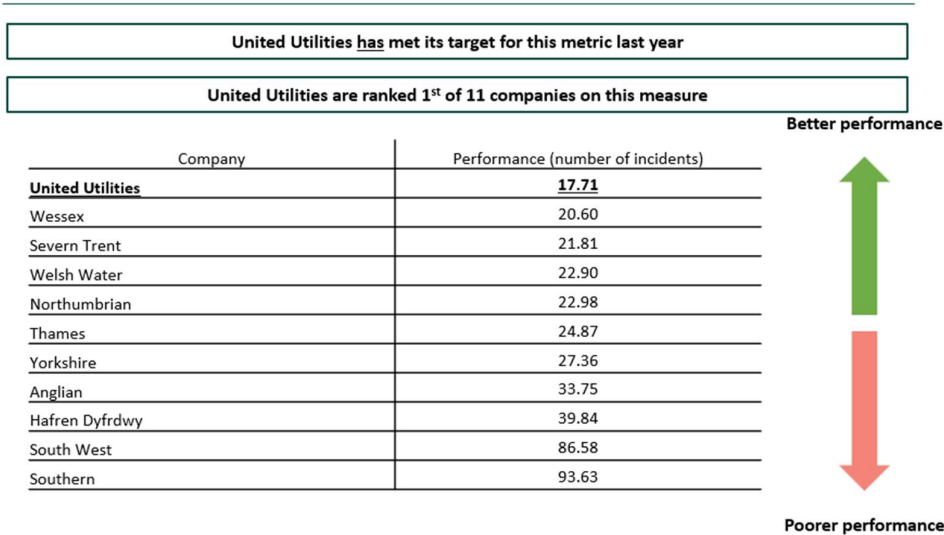


Pollution Incidents

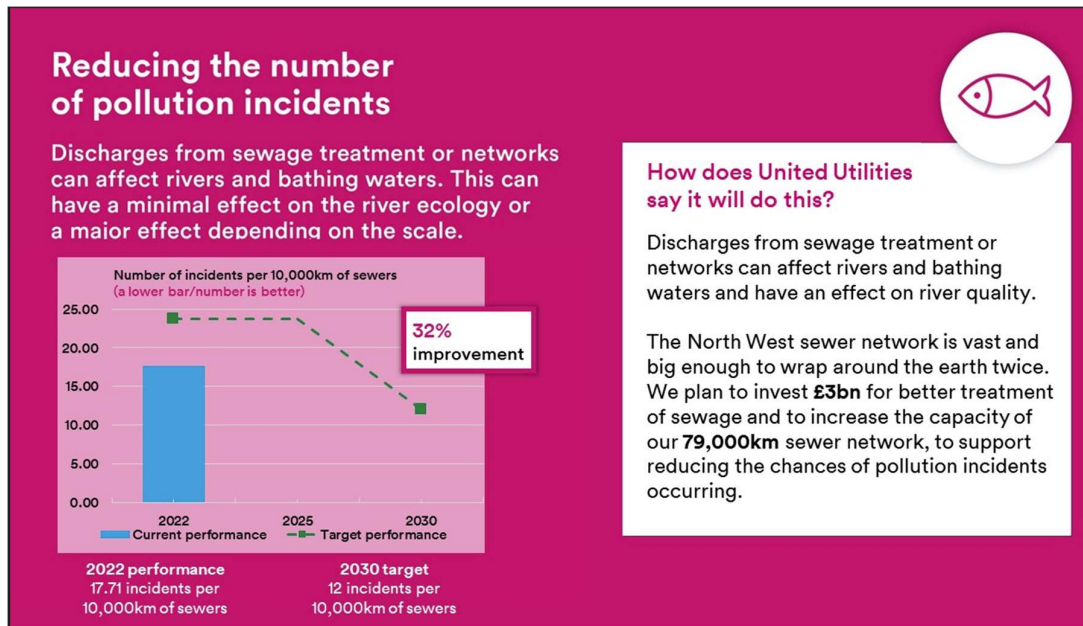
The following chart shows how United Utilities are performing on the number of incidents of pollution of rivers and streams, against both their target and also the other water companies.

Water companies measured on the number of incidents of pollution of rivers and streams

Number of incidents per 10,000 km of sewer.
Companies with the lowest numbers perform better



The following chart shows what United Utilities is proposing doing to improve things:



Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

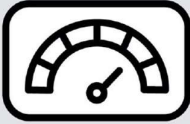
Please select one answer only

- Reducing sewer flooding **inside** properties
- Reducing sewer flooding **outside** properties
- Reducing the number of pollution incidents
- Don't know/can't say

The following slide describes one of the additional components of United Utilities' business plan; Smart Metering

Smart metering

Smart meters are water meters that give both you and United Utilities a live and accurate read-out of a property's water usage. This means you can see how much water you've been using, which can help customers to reduce their usage and lower bills.




900,000
new smart meters
in homes and
businesses
Target for 2030

Please note: Switching to a measured bill is completely optional for households.

How does United Utilities say it will do this?

We are investing in replacing current meters with smart meters which can be remotely read. This enables homes and businesses to have greater visibility of their usage data, leading to reduced usage and reduced bills.


Smart meters also help us detect leakage in the network, and proactively detect other network issues so they can be prevented before customers experience them. All of this contributes to reducing water wastage and protecting the environment and our natural resources.



The following slide describes one of the additional components of United Utilities' business plan; Chance of experiencing a hosepipe ban every 5 years

Halving the chance of experiencing a hosepipe ban between 2025–30

Hosepipe bans are introduced when United Utilities' water reserves in reservoirs start to run low.




Halving the chance
Target for 2030

How does United Utilities say it will do this?

We are investing in improving water treatment processes and investing in new water sources to help us be more resilient in times of dry weather.

This will enable us to halve the chances a customer would experience a hosepipe ban or water restrictions now and in the future. It also means our water supply can recover more quickly, when there are water shortages.



The following slide describes one of the additional components of United Utilities' business plan;
Carbon reduction

Carbon reduction to reduce the impact of our service on the environment

This relates to the greenhouse gas emissions released by United Utilities in the process of providing its services.

42% reduction Target for 2030*


The main sources of our emissions come from the energy and chemicals needed to move and treat huge volumes of water and wastewater and operational processes involved in treating the organic matter in sewage to make it safe to recycle back to the environment.

*Target refers to % reduction from a 2021/22 baseline figure.

How does United Utilities say it will do this?

A **£200m** programme of investment to lower emissions, for example by improving processes to treat water and sewage, moving away from fossil fuels and increasing our renewable energy.

We will also work in partnership to create woodland by completing our programme to plant a million trees and ensure peatland and ecosystems are restored to protect the environment.



The following slide describes one of the additional components of United Utilities' business plan;
Affordability support

Affordability support

Under the proposed plan, United Utilities would assign **£500m** towards a fund for struggling bill payers.


£250 million
Performance in 2021/22

£500 million
Target for 2030

How does United Utilities say it will do this?

We are investing to ensure there is a support package of **£500m** to provide discounted bills to customers who are struggling to pay for their water.

This is the largest support package United Utilities has ever offered.



Based on what you have just read, which of these four parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Installing more smart meters
- Reducing the chance of a hose-pipe ban
- Carbon reduction
- Affordability Support
- Don't know/can't say

Based on everything you have seen and read about United Utilities' proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Completely acceptable **GO TO 0**
- Acceptable **GO TO 0**
- Unacceptable **GO TO 0**
- Completely unacceptable **GO TO 0**
- Don't know/can't say

IF 0=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Don't know/ can't say

IF 0=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Don't know/ can't say

Long term investment by United Utilities will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

HH ONLY: Household Demographic

Q37. Thank you. Now just a few questions to check that we are speaking to a wide range of people.

In which of the following ways do you identify?

Female

Male

I identify in another way

Prefer not to say

Please indicate which one of the following best describes the profession of the chief income earner in your household

Higher managerial/ professional/ administrative (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)

Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)

Supervisory or clerical/ junior managerial/ professional/ administrative (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)

Skilled manual work (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)

Semi or unskilled manual work (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)

Housewife/Househusband

Unemployed

Retired **GO TO 0**

Student

Prefer not to say

IF 0=RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only

Private only

Both

Prefer not to say

IF 0= PRIVATE OR BOTH ASK: How would you describe the main income earner's occupation type before retirement?

Higher managerial/ professional/ administrative (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)

Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)

Supervisory or clerical/ junior managerial/ professional/ administrative (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)

Skilled manual work (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)

Semi or unskilled manual work. (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)

None of these

Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background

SINGLECODE

Please select one answer only

WHITE

English, Welsh, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

MIXED

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

BLACK OR BLACK BRITISH

Caribbean

African

Any other Black background

OTHER ETHNIC GROUP

Arab

Any other ethnic group

Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year

From £1,000 to £1,399 a week/From £52,000 to £72,799 a year

From £1,400 to £1,999 a week/From £72,800 to £103,999 a year

£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

GO TO 0

Q44A **ASK ALL** In which of the following United Utilities regions **[IF HH]** do you live in / **[IF NHH]** is your organisation based?

Cumbria

Merseyside

Greater Manchester

Lancashire

Cheshire
North Derbyshire
None of these
I'm not sure

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (e.g. to power machinery, agricultural production etc.)

For the supply of services your organisation provides (e.g. cleaning services etc)

For an ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)

None of the above

Don't Know

How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250

Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities

Professional, scientific and technical activities

Administrative and Support Service Activities

Public administration and defence

Education

Human health and social work activities

Arts, entertainment and recreation

Other service activities

Other (please specify)

Prefer not to say

Classification Questions

IF NON PANEL: We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS

M&S Voucher by email COLLECT EMAIL ADDRESS

One4All by email COLLECT EMAIL ADDRESS

Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes

No

QEND [IF HH] United Utilities offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

<https://www.unitedutilities.com/my-account/your-bill/difficulty-paying-your-bill/how-we-can-help/>

OK

APPENDIX F

Questionnaire (Paper version)

Affordability and Acceptability Testing

Thank you very much for agreeing to complete this online survey which is being conducted by Accent, an independent research agency. This survey is designed to help United Utilities, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **16th of August 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials, you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

When completing the survey please start from Question 1 (Q1) in the Qualification section.

If at any point in the qualification section you find **“Thank you for your time, it is not possible for your survey responses to be included – please stop here.”** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the question in the qualification section without that message appearing next to any of your answers please go to the “Main questionnaire” and follow the questionnaire order

Qualification questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Do you or any of your close family work in market research or for a water company?

Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

No

How old are you?

Please enter your age on the line below

Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you solely or jointly responsible for paying your household's water and sewerage bill?

Yes

No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you currently charged for water through a water meter?

Yes

No

Don't know

United Utilities is your water supplier, and is responsible for your sewerage services. Does this sound right?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know

Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

Main Questionnaire

Affordability

We are now going to ask you some questions about your household's financial situation.

Thinking about your finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills?

Please select one answer only

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say you are managing financially now?

Please select one answer only

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

Please select one answer only

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

How easy or difficult is it for you to afford to pay your current water and sewerage bill:

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart provided shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

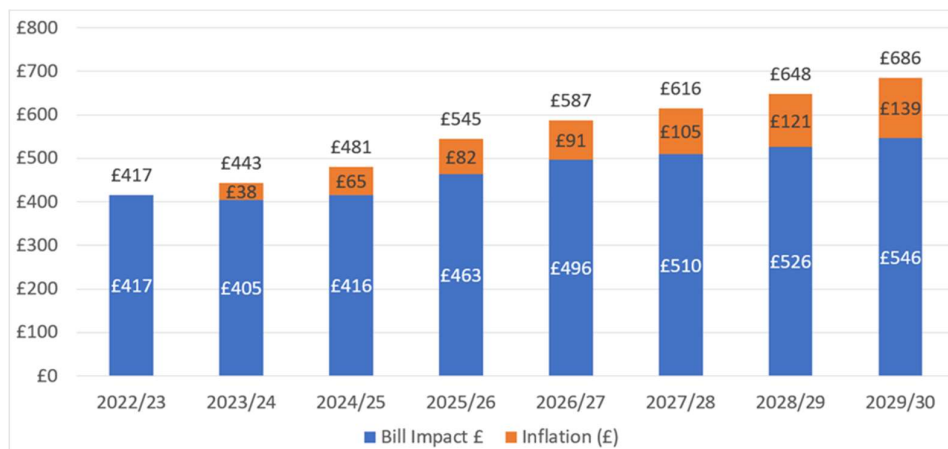
The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



How easy or difficult do you think it would be for you to afford these water/sewerage bills?

Please select one answer only

Very easy **Please skip question 12**

Fairly easy **Please skip question 12**

Neither easy nor difficult **Please go to Question 12**

Fairly difficult **Please go to Question 12**

Very difficult **Please go to Question 12**

Don't know

Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030

Please select all that apply

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify: _____
- Don't know

Acceptability

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five-year period. The plan we are showing you is for 2025- 2030.

The following chart shows how United Utilities are performing on the length of time properties are without water, against both their target and also the other water companies.

The following chart shows what United Utilities is proposing doing to improve things:

Water companies measured on the length of time properties are without water

Duration without water for more than 3 hours by minutes per property.
Companies with the lowest numbers perform better

United Utilities has not met its target for this metric last year

United Utilities are ranked **7th** of 17 companies on this measure

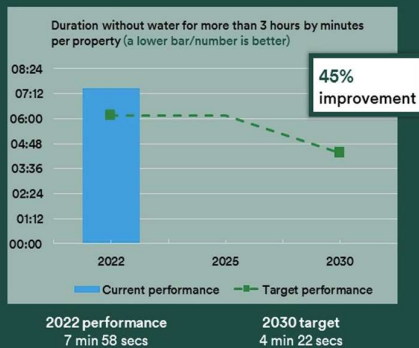
Company	Performance
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance

Poorer performance

Reducing interruptions to your water supply

If a water supply is interrupted without warning for more than three hours, it will not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.



How does United Utilities say it will do this?

We are investing **£150m** in our pipes and pumps, including upgrading **695km** of water mains to reduce the chances of pipes leaking, interruptions to customers' supply or water quality issues.

We are improving our water treatment processes and installing innovative network monitoring technology. This will reduce the number of times your water supply is interrupted. We are also upgrading our power to reduce interruptions to service in the event of a storm or natural disaster.



The following chart shows how United Utilities are performing on the amount of water lost due to leaks from water mains and pipes, against both their target and also the other water companies.

Water companies measured on the amount of water lost due to leaks from water mains and pipes

Number of litres lost per property per day
Companies with the lowest numbers perform better

United Utilities has met its target for this metric last year
United Utilities are ranked 16th of 19 companies on this measure

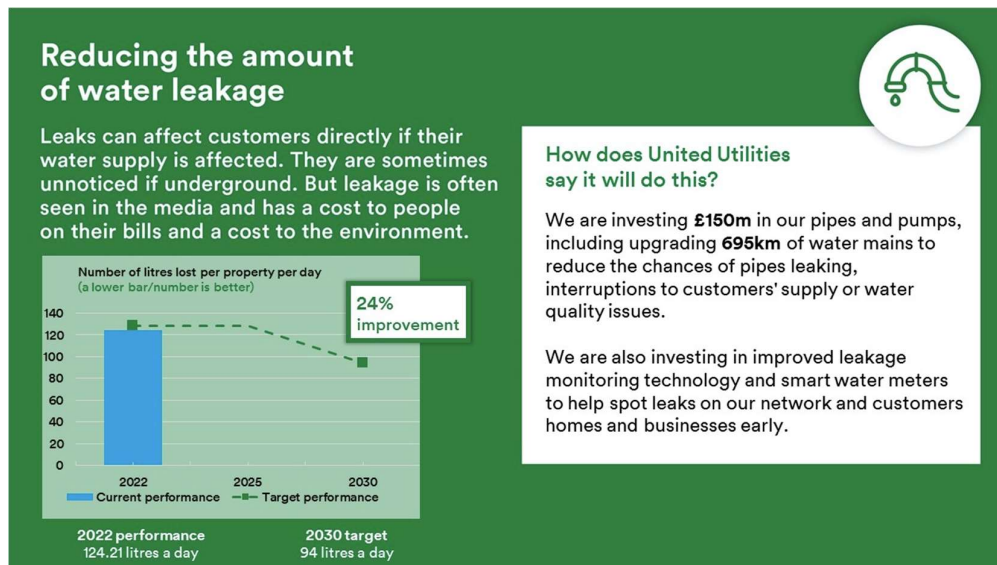
Company	Performance
Bristol	65.04
Essex and Suffolk	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
South Staffs	113.45
Severn Trent	119.66
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	131.01
Thames	151.51
Welsh Water	158.8

Better performance



Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:



The following chart shows how United Utilities are performing on the number of customer contacts regarding the appearance, taste and smell of tap water, against both their target and also the other water companies.

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 customers.

Companies with the lowest numbers perform better

United Utilities has not met its target for this metric last year
United Utilities are ranked 16th of 17 companies on this measure

Company	Performance (number of contacts)
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

Better performance

Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of water quality issues customers experience

Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

How does United Utilities say it will do this?

We are investing **£150m** in our pipes and pumps, including upgrading **695km** of water mains to reduce the chances of pipes leaking, interruptions to customers' supply and water quality issues.

We will improve our water treatment processes and install innovative network monitoring technology.

This will prevent issues with taste, smell or appearance of drinking water and help United Utilities spot and fix issues before they occur.

Number of customer contacts received regarding incidents, per 1,000 properties (a lower bar/number is better)

2021/2022 Current performance 1.79 complaints per 1,000 properties	2030 target Target performance 0.8 complaints per 1,000 properties
---	---

55% improvement

Based on what you have just read, which of these three parts of the business plan is the most important to you? *Please select one answer only*

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

The following chart shows how United Utilities are performing on the incidents of sewage flooding properties, against both their target and also the other water companies.

Water companies measured on the incidents of sewage flooding properties

Number of properties affected, per 10,000.
Companies with the lowest numbers perform better

United Utilities <u>has not</u> met its target for this metric last year
United Utilities are ranked 9 th of 11 companies on this measure

Company	Performance (number of properties affected)
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.98
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of properties affected by sewer flooding inside their property

An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

Year	Performance (events per 10,000 properties)
2022 performance	2.97
2030 target	2.06

31% improvement

How does United Utilities say it will do this?

We know having your property flooded with sewer flooding is unacceptable.

We are investing to:

- Increase our sewer capacity and upgrading sewers so they are stronger and can hold more water and waste
- Deliver sustainable drainage solutions, as less rainfall entering sewers reduces the likelihood of them overflowing
- Install improved monitoring technology to identify and fix problems before they occur.



The following chart shows how United Utilities are on the incidents of sewage flooding gardens or outbuildings, against both their target and also the other water companies.

Water companies measured on the incidents of sewage flooding gardens or outbuildings

Number of properties affected, per 10,000.
Companies with the lowest numbers perform better

United Utilities has met its target for this metric last year
United Utilities are ranked 5th of 11 companies on this measure


Company	Performance (number of properties affected)
Thames	9.4
Severn Trent	10.8
Anglian	14.55
South West	18.13
United Utilities	18.71
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

Better performance

Poorer performance


The following chart shows what United Utilities is proposing doing to improve things:

Reducing the number of properties affected by sewer flooding outside their property

An escape of sewage into gardens or access points to people's properties is inconvenient and unpleasant and can restrict access.



Number of properties affected per 10,000 (a lower bar/number is better)


2022 performance	2030 target
18.12 events per 10,000 properties	13.65 events per 10,000 properties

How does United Utilities say it will do this?

We know having your garden and other outside areas flooded with sewer flooding is unacceptable.

We are investing to:

- Increase our sewer capacity and upgrading sewers so they are stronger and can hold more water and waste
- Deliver sustainable drainage solutions, as less rainfall entering sewers reduces the likelihood of them overflowing
- Install improved monitoring technology to identify and fix problems before they occur.



The following chart shows how United Utilities are performing on the number of incidents of pollution of rivers and streams, against both their target and also the other water companies.

Water companies measured on the number of incidents of pollution of rivers and streams

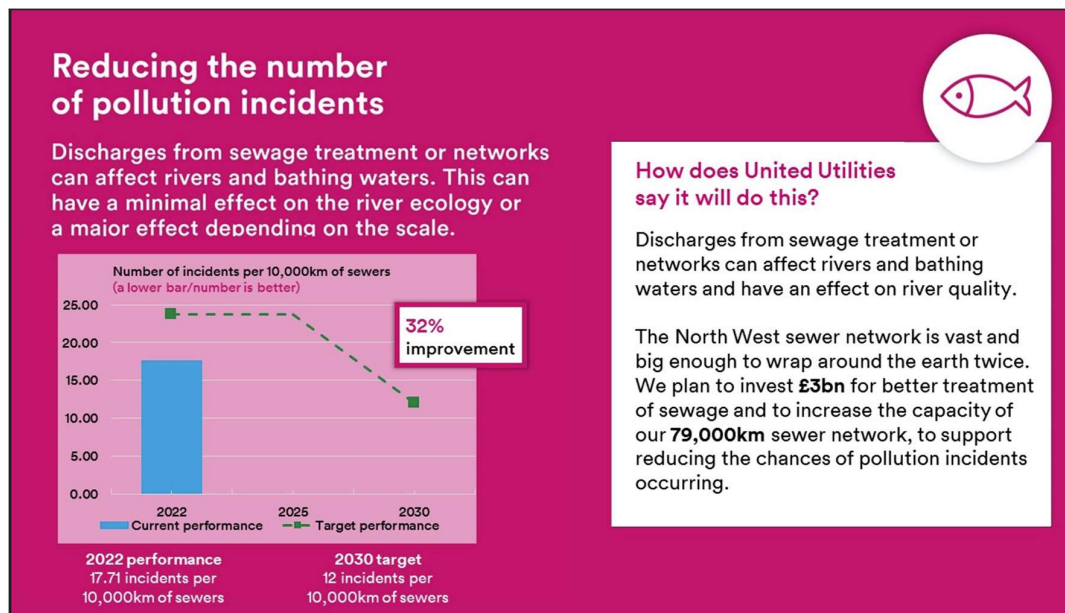
Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

United Utilities has met its target for this metric last year	
United Utilities are ranked 1 st of 11 companies on this measure	
Company	Performance (number of incidents)
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

Better performance ↑
↓ Poorer performance

The following chart shows what United Utilities is proposing doing to improve things:



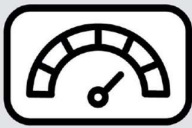
Based on what you have just read, which of these three parts of the business plan is the most important to you? **Please select one answer only**

- Reducing sewer flooding **inside** properties
- Reducing sewer flooding **outside** properties
- Reducing the number of pollution incidents
- Don't know/can't say

The following slide describes one of the additional components of United Utilities' business plan; Smart Metering.

Smart metering

Smart meters are water meters that give both you and United Utilities a live and accurate read-out of a property's water usage. This means you can see how much water you've been using, which can help customers to reduce their usage and lower bills.




900,000
new smart meters
in homes and
businesses
Target for 2030

Please note: Switching to a measured bill is completely optional for households.

How does United Utilities say it will do this?

We are investing in replacing current meters with smart meters which can be remotely read. This enables homes and businesses to have greater visibility of their usage data, leading to reduced usage and reduced bills.


Smart meters also help us detect leakage in the network, and proactively detect other network issues so they can be prevented before customers experience them. All of this contributes to reducing water wastage and protecting the environment and our natural resources.



The following slide describes one of the additional components of United Utilities' business plan; Chance of experiencing a hosepipe ban every 5 years.

Halving the chance of experiencing a hosepipe ban between 2025–30

Hosepipe bans are introduced when United Utilities' water reserves in reservoirs start to run low.




Halving the chance
Target for 2030

How does United Utilities say it will do this?

We are investing in improving water treatment processes and investing in new water sources to help us be more resilient in times of dry weather.

This will enable us to halve the chances a customer would experience a hosepipe ban or water restrictions now and in the future. It also means our water supply can recover more quickly, when there are water shortages.



The following slide describes one of the additional components of United Utilities' business plan; Carbon reduction.

Carbon reduction to reduce the impact of our service on the environment

This relates to the greenhouse gas emissions released by United Utilities in the process of providing its services.

42% reduction Target for 2030*

The main sources of our emissions come from the energy and chemicals needed to move and treat huge volumes of water and wastewater and operational processes involved in treating the organic matter in sewage to make it safe to recycle back to the environment.

*Target refers to % reduction from a 2021/22 baseline figure.

How does United Utilities say it will do this?

A **£200m** programme of investment to lower emissions, for example by improving processes to treat water and sewage, moving away from fossil fuels and increasing our renewable energy.

We will also work in partnership to create woodland by completing our programme to plant a million trees and ensure peatland and ecosystems are restored to protect the environment.



The following slide describes one of the additional components of United Utilities' business plan; Affordability support.

Affordability support

Under the proposed plan, United Utilities would assign **£500m** towards a fund for struggling bill payers.


£250 million
Performance in 2021/22

£500 million
Target for 2030

How does United Utilities say it will do this?

We are investing to ensure there is a support package of **£500m** to provide discounted bills to customers who are struggling to pay for their water.

This is the largest support package United Utilities has ever offered.



Based on what you have just read, which of these four parts of the business plan is the most important to you? **Please select one answer only**

- Installing more smart meters
- Reducing the chance of a hose-pipe ban
- Carbon reduction
- Affordability Support
- Don't know/can't say

Based on everything you have seen and read about United Utilities' proposed business plan, how acceptable or unacceptable is it to you? **Please select one answer only**

- Completely acceptable **Please go to Question 0**
- Acceptable **Please go to Question 0**
- Unacceptable **Please go to Question 0**
- Completely unacceptable **GO TO 0 Please go to Question 0**
- Don't know/can't say

Answer if you selected "Unacceptable" or "Completely unacceptable" at question 27 (0 above)

What are the two main reasons that you feel the proposals for your water services are unacceptable?

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify _____
- Other 2, please specify _____
- Don't know/ can't say

Answer if you selected "Acceptable" or "Completely" acceptable at question 27 (0 above)

What are the two main reasons that you feel the proposals for your water supply are acceptable?

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify _____
- Other 2, please specify _____
- Don't know/ can't say

Long term investment by United Utilities will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

Household Demographic

Thank you. Now just a few questions to check that we are speaking to a wide range of people.

In which of the following ways do you identify?

- Female
- Male
- I identify in another way
- Prefer not to say

Please indicate which one of the following best describes the profession of the chief income earner in your household

- Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)
- Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
- Supervisory or clerical/ junior managerial/ professional/ administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)
- Skilled manual work** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)
- Semi or unskilled manual work** (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)
- Housewife/Househusband
- Unemployed
- Retired **GO TO 0**
- Student
- Prefer not to say

Answer if you have selected "retired" at question 32 (0 above)

Does the main income earner have a state pension, a private pension or both?

- State only
- Private only **GO TO Q39**
- Both **GO TO Q39**
- Prefer not to say

Answer if you have selected "private only" or "Both" at question 32 (0 above)

How would you describe the main income earner's occupation type before retirement?

- Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)
- Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
- Supervisory or clerical/ junior managerial/ professional/ administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)
- Skilled manual work** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)
- Semi or unskilled manual work.** (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)
- None of these
- Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion.

Please select all that apply

- I or another member of my household is disabled or suffer(s) from a debilitating illness
 - I or another member of my household have/has a learning difficulty
 - I or another member of my household relies on water for medical reasons
 - I or another member of my household is visually impaired (i.e. struggles to read even with glasses)
 - I or another member of my household am/is over the age of 75 years old
 - I or another member of my household speaks English as a second language
 - I or another member of my household is deaf or hard of hearing
 - I or another member of my household is a new parent
 - None of these apply to me
 - Prefer not to say
-

What is your ethnic group? Choose one option that best describes your ethnic group or background

Please select one answer only

WHITE

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

MIXED

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

ASIAN OR ASIAN BRITISH

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other Black background

OTHER ETHNIC GROUP

- Arab
 - Any other ethnic group
 - Prefer not to say
-

Which of the following bands does your household income fall into from all sources before tax and other deductions?

- Up to £199 a week/Up to £10,399 a year
 - From £200 to £299 a week/From £10,400 to £15,599 a year
 - From £300 to £499 a week/From £15,600 to £25,999 a year
 - From £500 to £699 a week/From £26,000 to £36,399 a year
 - From £700 to £999 a week/From £36,400 to £51,999 a year
 - From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
 - From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
 - £2,000 and above a week/£104,000 and above a Year
 - Don't know
 - Prefer not to say
-

In which of the following United Utilities regions do you live?

- Cumbria
- Merseyside
- Greater Manchester
- Lancashire
- Cheshire
- North Derbyshire

- None of these
 - I'm not sure
-

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher
- M&S Voucher
- One4All
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

- Yes
- No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

United Utilities offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

<https://www.unitedutilities.com/my-account/your-bill/difficulty-paying-your-bill/how-we-can-help/>

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

APPENDIX G

Cognitive Report

Question	Comments	Action
General	<p>In general the survey was well received with participants stating the following about it:</p> <ul style="list-style-type: none"> • Was not too long • There was nothing that they couldn't understand • Quite interesting especially seeing what UU plan to do in the future • All broken down not just text • Good balance of words with images • Interesting comparing companies • Interesting and straight forward • Had enough multiple-choice options • Was not found to be too repetitive • The information from the business plans was new for many participants as they were unaware of certain elements • It's spot on in terms of length and content • It shows that there is room for improvement at UU, but also shows how they are planning to address these issues 	None required
	<p>A participant that worked with disabled people raised a concern about how accessible this survey is to people with disabilities – suggested having two versions of the survey one with more information and one more accessible</p>	This is not an option due to the nature of this survey
	<p>One participant was confused and didn't understand that not all customers will experience the disruptions and was particularly concerned about the unplanned interruption as they have never experienced an issue</p>	None required

	<p>One participant was concerned that many from the general public will not read all the information and will just want to skip to the end of the survey to receive their reward</p>	None required
<p>Introduction (Questions 1-8a)</p>	<p>The questions in this section were seen as pretty straight forward, clear and most participants did not have any issues completing these sections. One participant remarked about this section that <i>“Sets out what's what and simple clear concise questions like how the data protection and all the items are spelled out”</i></p> <p>One participant clicked on all the links in this section and got confused by the MRS website as they thought it was meant to be the Accent website</p> <p>One participant commented they liked the ability to return at a later stage to complete the survey</p> <p>NHH participants had no issues with these questions</p>	None required
<p>Affordability (Questions 9-13)</p>	<p>These questions in this section were found to be standard questions, just general how are you doing questions. Participants had no issues answering them and have noted they were easy to understand and they were <i>“is what it is”</i> type of questions.</p> <p>One participant suggested that this section intended to <i>“get you to think about the value for money for your water services”</i></p> <p>One participant liked that this section had enough options, good words used for the options <i>“it's easier to be honest when the options are actually meaningful”</i></p>	None required
	<p>Some participants found it hard to thinking so far ahead as there are so many thing that can change in 7 years</p>	None required – the question is asked as per guidance

<p>Q11 Thinking about your household's/ your organisation's financial situation over the next few years up to 2030, do you expect it to get</p>	<p>One participant was felt we may have people answering randomly as people are worried about inflation and that people may not be managing so well. they felt that things will get worse before they get better.</p> <p>One participant said it comes across as guessing how ambitious or pessimistic you are about the future. <i>"There are so many other factors going on e.g. Brexit and Ukraine that it feels very personal so ask how do you see your situation changing in a world filled with growing change"</i></p>	<p>None required</p>
<p>Q13.How easy or difficult is it for you your company/organisation to afford to pay your current water and sewerage bill?</p>	<p>One participant remarked they found this question very easy because they pay by direct debit. Did not consider the actual cost but rather the method of payment.</p>	<p>None required</p>
<p>Bill increase/inflation chart</p>	<p>The majority of participants were able to digest the information in the top half of the page and remarked that:</p> <ul style="list-style-type: none"> • The text was easy to read and they liked the split in bullet points and a short paragraph • The information was clear and understandable 	<p>None required</p>
	<p>Some participants took some time to read the information and remarked it was:</p> <ul style="list-style-type: none"> • More official looking • Being hit with a wall of text 	<p>None required</p>
	<p>One particular participant that had a pretty strong prescription struggled to read the text in italics, however he remarked that the font was big enough</p>	<p>Potentially change the text from Italics to underlined or bold</p>

	<p>The graph was well received and understood by participants.</p> <ul style="list-style-type: none"> The blue orange differentiation was highlighted by a number of participants (<i>“Liked how the use of colours distinguishes between the actual bill and how much in the increase is due to inflation”</i>) 	None required
	One participant questioned why does the bill in blue go down for the next period after and the bill is higher due to inflation – does this mean had we not had inflation the bill would have gone down?	None required
	One participant suggested adding a third colour (purple) to the graph to highlight how much of the new bill is going towards investment	None required- this is out of scope
	One participant mentioned making the combined figure a bit more prominent – perhaps bold it	Bold the combined figure
	One NHH participant mentioned that basically all this information is conjecture, it is an estimation not actual accurate information	None required
	One NHH participant remarked that no one plans bills that far in advance	
Q14 /Q15(affordability of proposed bills)	<p>Participants found these questions clear and easy to understand</p> <p>Even though participants understood the questions some had difficulty picturing the future that far ahead.</p> <ul style="list-style-type: none"> “it is difficult to know what you are not doing as much of in order to pay for your bills (e.g. when eating out is the same as your bill)” “it’s hard to answer so far ahead as there are many things that can change “ NHH are worried about impacts to the industry that can affect future 	None required
	One participant suggested replicating the bill projection graph to the side to help answering the question	None required – most participants were OK with the question as it is
Comparative Data (generally)	Generally the charts were understood. Some participants understood the charts straight away but some took looking through a couple to understand what they were looking at.	None required

	<ul style="list-style-type: none"> • Quite a few participants mentioned there is no need to compare UU to how other companies are doing • Some mentioned UU should just focus on itself 	None required
	<p>One participant liked how on the chart UU's position and if they had or not had met their target is also written out in the boxes above</p>	
	<ul style="list-style-type: none"> • Two participant mentioned they liked the red and green arrows and how they allowed them to place UU in the ranking • Two participants mentioned liking the leader board style of this chart 	
	<p>3 participants mentioned that the performance figures were confusing</p> <ul style="list-style-type: none"> • Six digits in the interruptions slide was very confusing • 17.71 - participant had to look and focus a little to digest all the information in this slide • One participant suggested to use % instead of these figures <p>One participant mentioned that the instances where UU has not met its target are not highlighted enough</p>	These slides are prescribed in terms of format (and the latest, most simple, format of the slides has been used)
	<p>Several participants have mentioned having difficulty reading the data in the chart</p>	Increase font size in final charts
	<ul style="list-style-type: none"> • Two participant mentioned that the actual target is not shown in the chart. • One participant suggested adding a year on year target chart to accompany the images 	None required – these slides are done in accordance with the guidance
	<ul style="list-style-type: none"> • One participant added that when you first look at the list of names it is hard to tell whether it is companies or regions in the list. • One participant suggested to add a map of UU regions • Two participants have suggested to add more detailed regional information as it would add more relevance to the list of planned improvements 	This is outside the scope of research. Something for UU to consider in their comms campaigns

Unplanned interruptions	The visual was found to be aesthetically pleasing and participants were generally able to understand this element of the business plan	None required
	A participant mentioned <i>"It's not clear how they get the average duration. It's like there are two metrics, one for more than three hours and one in minutes. It should say the average time per property in hours minutes and seconds if that's how it's measured"</i>	Potentially amend the subheading on the chart to make this clearer
	One participant got confused by an interrupted water supply as never experienced one and thought this was going to happen. <i>"Has this happened to other people? I think it should say at the top of lower graphic, 'If this has happened to you'"</i>	None required – this was not found to generally be an issue
	4 participants have mentioned not understanding or being confused by the clock infographic. Some mentioned the text would have been sufficient	Consider replace the clock with a different representation or alter shading in the image to make it clearer how this aligns with % improvement
	This slide was well received and the imagery has been found to be aligned to with the words are saying	None required
Leakage charts/slide	One participant suggested that the wiggly lines depicting the water were confusing and making the text hard to read and suggested having a straight line instead	None required – this is negated by the number of participants that have said the image really works and the wiggly lines represent waves in the water and how it makes it all clear
	Several participants have mentioned how well the image of the water aligns with the text message	
	The infographic was found to be informative <i>"Didn't realise it was leakage per property per day until reading the lower infographic"</i> A number of participants have remarked how poorly UU are performing on this metric compared to other companies	None required

Water quality	This slide was generally well received and participants understood the message	None required
	One participant remarked that they did not know what is meant by innovative technology network	Potentially add an example in brackets if relevant
	One participant struggled to understand this slide, did not understand the figure of 1.79 contacts	None required – figures reported as per guidance
	One participant mentioned that one of the paragraphs is the same as on the previous slide so it makes it harder to understand how this translates to water quality and makes the plans harder to believe – participant mentioned adding more specific information	None required – this has not been found as an issue anywhere else and due to time redesign is not advised
Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants found answering this question straight forward and participants have chosen the answer based on what it is important to them	None required
	Some participants have spoken about actively putting past experiences (like recent water supply interruptions, leaks or text messages about the water supply) at the back of their minds to really think what is important to them	
Internal sewer flooding	The majority of participants found this information clear especially liking the format of the text with the bullet points and no use of jargon	None required
	A couple of participants found the colouring in green of the house on the right to represent the % change did not translate well for this slide	
	Two participant mentioned that the reduction from 2.98 to 2.06 does not seem like a massive improvement but 31% feels like a large amount	
	One participant mentioned adding information on accountability for these accidents	
	One participant was really surprised to see this information as did not realise it was such a widespread problem	

External sewer flooding	One participant mentioned that the image of the green house colouring did not translate well for this slide	None required
	One NHH participant observed that most businesses do not have a garden so this may not be relevant to them and that the two slides about flooding should be mentioned together	
	One participant wanted to have more information on accountability included in the slide	
Pollution	Participants found this slide to be one of the ones most easy to understand	None required
	One participant mentioned that pink may not be the best colour for pollution	
	One participant wanted to include a map of areas where it is safe to swim	
	One participant suggested that the language on this slide waters down the actual impact of pollution e.g. "can affect rivers..." should be replaced with something 'more accurate' like "it does affects rivers..."	UU to consider revising language
	One participant mentioned the text does not say that the pollution affects the sea as well so it should also include that	None required
Q23 Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants have found answering this question a bit harder than Q19 and would have liked to be able to select more than one option.	None required – question asked as per guidance
Smart metering	Participants had no issue with this slide all information was clear	None required
	One participant remarked that grey was a bit boring compared to the previous images so perhaps using a better colour for the background and the same for all the other slides in this section	

	One participant mentioned perhaps adding a picture of a real smart meter to replace the current image	
	One participant mentioned the note at the bottom left could be enlarged as they missed it the first time round	
	One participant mentioned this slide may be irrelevant to renters (as they do not have a choice over the installing of meters) and another one that lived at a property that cannot be metered	
Hosepipe bans	Information of this slide was found to be clear.	None required
	Some participants were surprised to see this as they found this does not really apply to the area they live in	
	One participant wanted a bit more information on what exactly UU are planning to do to reduce this risk	UU to consider adding more information
Carbon reduction	One participant said they found it hard to follow this slide as they don't know much about carbon	UU to consider changes
	One participant found this slide could have its terminology broken down further into more layman terms e.g. what are green gas emissions.	
	One participant mentioned there is too much text and the slide could use a bit more imagery	
	Two participants mentioned the background colour is a bit dull	
	One participant wanted more information on how UU will change their processes to achieve this reduction	
	One participant wanted to know what are UU moving to since they are moving away from fossil fuels?	

	One participant wanted to know more information about the tree planting campaign; they were aware of areas where trees planted under this initiative have caused issues	
Affordability support	This slide was found to be very informative as many were not aware of support offered from UU. Additionally, the slide was found to be clear and well laid out	None required
	One participant wanted more information on how this is going to be spread out among customers	None required- this is outside the scope of this research
	Some participants wanted more information on the qualification criteria for this support	
Q28. Based on what you have just read, which of these four parts of the business plan is the most important to you?	Question was found to clear and easy to answer.	None required
Q29. Based on everything you have seen and read about United Utilities' proposed business plan, how acceptable or unacceptable is it to you?	One participant commented that at this point it would be good to include a note on the plans that would be put in place with some indication of level of spend to help decide	None required – question asked as per guidance
	One participant was confused if this question refers to all the elements of the business plan or just the last 4	None required – everyone else did not seem to have an issue
	One participant wanted the option to write in their own answer at this point	None required – question asked as per guidance
Q30. What are the two main reasons that you feel the proposals for your water services are unacceptable?	One participant wanted an option to say that shareholders and senior leadership are being paid too much	None required – question asked as per guidance and there is a “please specify” option
Q32 Long term investment by United Utilities will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?	Participants found it hard to answer this question as it poses a moral dilemma. Participants felt it is not fair for the future generations to pay for these improvements but at the same time they worry about their current financial wellbeing	None required
	One participant found this hard to answer as they felt this investment should have been started by now	None required

<p>Q37. United Utilities offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:</p>	<p>This was generally acknowledged to be a great addition as everyone wanted to make sure people in need are supported, one participant even opened the link to review in their own time</p>	<p>None required</p>
<p>Demographics Q38-Q44a</p>	<p>One participant felt that this could be made to stand out a bit more and perhaps turned into an infographic like all the business plan slides</p> <ul style="list-style-type: none"> • Participants had no issues in understanding or completing these questions. • A couple have mentioned they liked the option to say “identify in a different way” at the gender question 	

