

SYSTEM INFORMATION:

Date:

Time interview started:

Water Company Research

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency.

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

Any answer you give will be treated in confidence in accordance with the Code of Conduct of the 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>.

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.

About you and your water company

Q1. 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/>.

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

Yes

No **THANK AND CLOSE**

Q1A In which of the following areas do you live?

Cheshire
Cumbria
Greater Manchester
Lancashire
Merseyside
Other

QUOTA TARGETS:

Other (Border Areas)	c1%
Cheshire	20%
Cumbria	5%
Greater Manchester	36%
Lancashire	27%
Merseyside	12%

Q2. Which water company supplies water to your home?

Affinity Water

Anglian Water
Bournemouth Water
Bristol Water
Cambridge Water
Essex & Suffolk Water
Hafren Dyfrdwy
Hartlepool Water
Northumbrian Water
Portsmouth Water
Severn Trent Water
South East Water
Southern Water
South Staffs Water
South West Water
Sutton & East Surrey (SES) Water
Thames Water
United Utilities
Welsh Water/Dŵr Cymru
Wessex Water
Yorkshire Water
Don't know **GO TO Q3**
Definitely none of the above

CLOSE IF NOT United Utilities or don't know
CHECK QUOTAS

Q3. IF Q2=UNITED UTILITIES GO TO Q5:
IF Q2=DON'T KNOW ASK: Please could we have the first part of your postcode and we will check who your supplier should be?

Q4. IF UNITED UTILITIES: Based on your postcode area, we believe your water supply company should be United Utilities. Is that correct?
IF NOT UNITED UTILITIES: Thank & close

Yes
No

IF NOT UNITED UTILITIES THANK AND CLOSE

Q5. Are you the person in your household who is responsible, either solely or jointly, for paying for your water bill from United Utilities?

Yes
No **THANK AND CLOSE**

Q6. Do you or any of your close family work or have worked in the recent past for United Utilities?

Yes **THANK AND CLOSE**
No

Q7. Which of the following age groups do you fall into?

18-29
30-39
40-49
50-59
60-69

70-79
80 or older
Prefer not to say

CHECK QUOTAS
18-29 7%
30-39 15%
40-49 16%
50-59 19%
60-69 15%
70-79 13%
80+ 8%
Unknown 7%

Q8. Are you....

Male
Female
Prefer not to say

Q9. Which of the following best describes your household?

Owner Occupier (with or without mortgage)
Shared Ownership or Keyworker
Private Rented
Social Housing rented (Council Housing, Housing Association or similar)
Prefer not to say

Q10. Do you have a water meter?

Yes
No
Don't Know

Q10x Do you know how much your annual water bill is?

Yes
No

Q10Y **IF Q10X = 1 ASK:** Please enter the amount of your enter water bill.

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Main Questionnaire

Thank you for answering those questions. The rest of 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.

Q11. We are now going to describe five initiatives that United Utilities are planning to introduce. Please take time to read each of them carefully and then answer a few questions about each.

Introduction to new green initiatives

United Utilities are supporting the Government's agenda to support the economy and help ensure a green recovery from COVID-19.

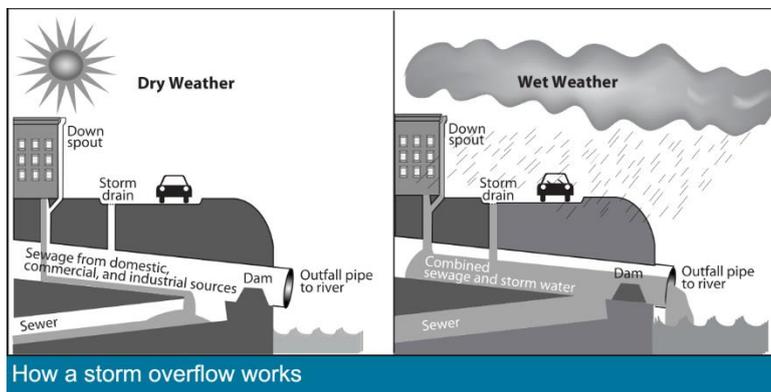
In the following screens we describe five initiatives that United Utilities are planning which are designed to support a green recovery, support the economy (through job creation and increased economic activity) and improve the environment. These initiatives have been part of United Utilities' long-term plans but are now being brought forward to support the green recovery agenda.

THE ORDER OF THE FIVE PROPOSALS WILL BE RANDOMISED

Storm Overflow Monitoring

What is a storm overflow and why does it happen?

Heavy or prolonged rainfall can cause sewers to overflow. Storm overflows act as a relief mechanism, allowing the excess storm water to be released into rivers or the sea. This protects properties from flooding and prevents sewage from backing up into streets and homes during heavy storms.



One way to address this could be to increase sewer capacity but this is a very large and expensive project which could cause a lot of disruption to the services we provide to customers.

What do United Utilities want to do?

United Utilities plan to increase understanding about when and where storm overflow spills occur so that they can reduce the risk of overflows in the future. United Utilities plan to fit more storm overflow sensors to monitor the whole network. These will alert United Utilities every time there is a spill from a storm overflow. We also plan to increase our investigations into the impact of overflows operating.

Understanding more about sewer spills across the network will help United Utilities identify where and why they occur so that they can find the most effective solutions to reduce them. This will allow United Utilities to make investments which will protect the environment, reduce pollution and improve service.

Q12. Do you support or oppose this initiative?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

Q13. IF Q12=4 OR 5 ASK: Why do you oppose this initiative?

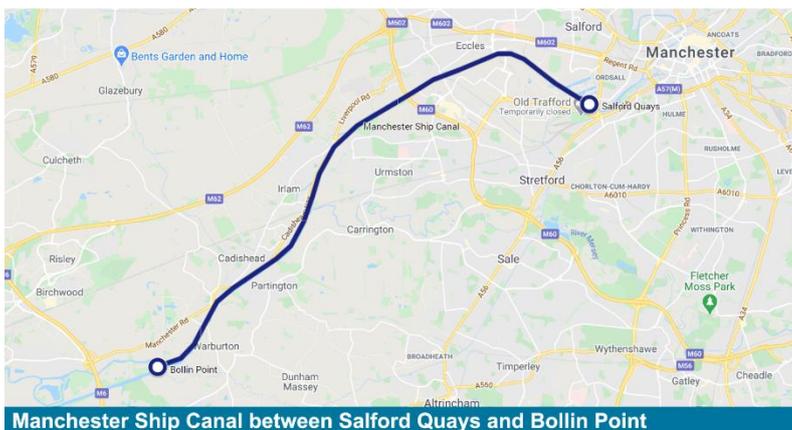
Q14. How acceptable do you find this initiative if there was an increase of 10p on the average **annual** water bill **from 2025** to pay for it? **IF SHOWN FIRST:** The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025.

- Very acceptable
- Acceptable
- Neither unacceptable nor acceptable
- Unacceptable
- Very unacceptable
- Don't know

Irwell and Manchester Ship Canal Environmental Improvement scheme

What is the Irwell and Manchester Ship Canal Environmental Improvement scheme?

When the Victorians constructed the Manchester Ship Canal between Salford Quays and Bollin Point it replaced the natural river system. The majority of Greater Manchester now drains into this canal. It is deep and slow moving, which leads to low concentrations of dissolved oxygen – a significant threat to fish.



What do United Utilities want to do?

United Utilities would like to improve water quality standards in the Manchester Ship Canal by reducing spills from sewage overflows into the canal and upstream rivers. Spills happen when the amount of water entering into a sewer exceeds capacity.

United Utilities would like to construct two large underground tanks to reduce the frequency of overflows. This would mean that during a storm sewage would first be directed into the tank, rather than into the canal. This would result in improvements to the water quality of the Manchester Ship Canal, improving conditions for fish and wildlife.

Q15. Do you support or oppose this initiative?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

Q16. **IF Q15=4 OR 5 ASK:** Why do you oppose this initiative?

Q17. How acceptable do you find this initiative if there was an increase of 70p on the average **annual** water bill **from 2025** to pay for it? **IF SHOWN FIRST:** The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025.

- Very acceptable
- Acceptable
- Neither unacceptable nor acceptable
- Unacceptable
- Very unacceptable
- Don't know

Water Meter Installation

United Utilities (UU) are planning to install 165,000 new water meters across the region to help them better understand how much water is used and to find and fix leaks more quickly. UU plan to fit these extra meters at homes that don't currently have a meter, in areas where they will provide the greatest benefit.

Installing water meters will mean UU can ensure the whole water network is more water efficient and has less negative impact on the environment.

The new water meters will be installed outside customer premises in the pavement. Customers will continue to be charged on an unmeasured basis, however if a water meter is installed outside your home, your water bill will show you the amount you would pay if you had a water meter so that you can compare that to your current fixed cost. This will give customers greater control and understanding of their water use, and more control over their bills.



Water meter outside customer premise

Q18. Do you support or oppose this initiative?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

Q19. **IF Q18=4 OR 5 ASK:** Why do you oppose this initiative?

Q20. How acceptable do you find this initiative if there was an increase of 90p on the average **annual** water bill **from 2025** to pay for it? **IF SHOWN FIRST:** The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025.

- Very acceptable
- Acceptable
- Neither unacceptable nor acceptable
- Unacceptable
- Very unacceptable
- Don't know

Greening Catchment Areas

The land immediately surrounding reservoirs has a significant impact on water quality and maintaining it well can benefit the environment.

United Utilities are planning to expand the work they do to protect the land and rivers in the North West by working with neighbouring landowners, farmers and businesses to ensure their sustainable practices have a positive impact across the region.

How do United Utilities plan to do this?

There are four main ways United Utilities are planning to protect the environment in their catchment areas:

	What is it?	What do United Utilities plan to do?
Phosphorous management 	Phosphorous is a nutrient that is present in sewage. Too much phosphorous can be bad for aquatic creatures as it reduces the levels of oxygen in the water	Rather than use chemicals to remove phosphorous at sewage works as is currently done, United Utilities plan to work with local environmental bodies, businesses and landowners to reduce phosphorous pollution at source
Sustainable drainage 	United Utilities plan to invest in ways to take surface water out of their network and drain it sustainably.	United Utilities will invest in technology that will mimic natural drainage solutions and prevent rainwater going into the sewers. This will reduce the likelihood of sewage flooding homes and streets, as well as reducing the environmental impact of spills into waterways.
Invasive species management 	Overgrowth of weeds like Japanese Knotweed, Himalayan Balsam and Giant Hogweed can block sunlight to other plants below the water's surface harming biodiversity. Giant Hogweed can also be harmful to humans.	Working in partnership with landowners and farmers United Utilities' plan to tackle these weeds. They will do this with a reduction in the use of pesticides that are detrimental to the environment and water quality. This will mean that people can safely access this land without fear of being affected by these harmful plants.
Peatland restoration 	The peatlands store a lot of water (70% of the UK's drinking water come from this area) and is also beneficial to the environment as it is a natural carbon store. This means it absorbs more carbon than the carbon dioxide it gives off. Unfortunately, this area has been degraded by wildfires, industrial pollution and overgrazing.	United Utilities propose to restore more peatland by: <ul style="list-style-type: none"> • investing in sustainable ways to naturally hold more water • creating fire breaks to protect against wildfires • installing fencing to protect wildlife and prevent overgrazing from farm animals.

Q21. Do you support or oppose these initiatives?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

Q22. IF Q21=4 OR 5 ASK: Why do you oppose these initiatives?

Q23. How acceptable do you find this initiative if there was an increase of £1.30 on the average **annual** water bill **from 2025** to pay for it? **IF SHOWN FIRST:** The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025.

- Very acceptable
- Acceptable
- Neither unacceptable nor acceptable
- Unacceptable
- Very unacceptable
- Don't know

Bioresources

Every year United Utilities treat around 200,000 tonnes of sewage sludge. Sewage sludge is generated as a by-product from sewage treatment. The sewage sludge is safely treated and can be converted to generate renewable energy that can be fed into the National Grid.

In order to meet new environmental regulations, United Utilities will need to make improvements to many of their sludge treatment sites.

What improvements do United Utilities want to make?

- Install new instruments to enhance the way they monitor environmental emissions
- Add measures to prevent spillages or bursts
- Improve equipment to ensure their gas systems and odour control is improved to meet better air quality standards.



United Utilities also plan to build an advanced sludge treatment process to serve much of the North West that will produce renewable gas which can be injected into the National Gas Grid or used to generate renewable electricity.

These proposed improvements will reduce harmful industrial emissions and improve the environment. Overall, this will reduce United Utilities' total annual carbon emissions by around 10%.

Q23A Do you support or oppose this initiative?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

Q23c IF Q23A=4 OR 5 ASK: Why do you oppose this initiative?

Q23d How acceptable do you find this initiative if there was an increase of £2 on the average **annual** water bill **from 2025** to pay for it? **IF SHOWN FIRST:** The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025.

- Very acceptable
- Acceptable
- Neither unacceptable nor acceptable
- Unacceptable
- Very unacceptable

Don't know

Q23x Thank you for answering those questions about the five initiatives.

Thinking about them again, please say how important each of the initiatives is? [Click on the ⓘ button to see more information](#)

ORDER OF INITIATIVES SAME AS PRESENTED

	Not at all important	Un- important	Neither	Important	Very important	Don't know
Storm Overflow Monitoring ⓘ						
Irwell and Manchester Ship Canal Environmental Improvement scheme ⓘ						
Water Meter Installation ⓘ						
Greening Catchment Areas ⓘ						
Bioresources ⓘ						

Q23y **IF TWO OR MORE RANKED VERY IMPORTANT ASK:** Which of them do you think is most important?
[Click on the ⓘ button to see more information](#)

INITIATIVES RANKED VERY IMPORTANT IN Q23X

Q23z **IF THREE OR MORE RANKED VERY IMPORTANT ASK:** And which of them do you think is 2nd most important?
[Click on the ⓘ button to see more information](#)

INITIATIVES RANKED VERY IMPORTANT IN Q23x

EXCLUDE ONE CHOSEN IN Q23y

Impact of proposals on bills

Q24. If United Utilities delivered **all five** of the improvements that we've shown you and started work on these in 2025, how acceptable would you find a £5 total increase on the average **annual** water bill **from 2025** to pay for these services bearing in mind that in the next five years overall household bills may change? The average annual water bill in 2020 is £442. When considering how acceptable you find these initiatives, it's important to bear in mind possible changes in your household finances and other household bills from 2025

Very acceptable
Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Q25. **IF Error! Reference source not found.=1 OR 2 ASK:** Why do you think this is acceptable?

Q26. **IF Error! Reference source not found.=4 OR 5 ASK:** Why do you think this is unacceptable?

Q26X **IF Error! Reference source not found.=1 OR 2 (ACCEPTABLE) ASK:** How acceptable do you find these five initiatives if there was an increase of £7 on the average **annual** water bill **from 2025**?

Very acceptable
Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Q26Y **IF Error! Reference source not found.=4 OR 5 (UNACCEPTABLE) ASK:** How acceptable do you find these five initiatives if there was an increase of £3 on the average **annual** water bill **from 2025**?

Very acceptable
Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Q26Z **IF Q26Y=4 OR 5 (UNACCEPTABLE) ASK:** How acceptable do you find these five initiatives if there was an increase of £1.50 on the average **annual** water bill **from 2025**?

Very acceptable
Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Q27x If work on the five initiatives were introduced in 2021 rather than 2025 this would bring forward the support for a green recovery, support for the economy (through job creation and increased economic activity) and the improvement to the environment.

IF Error! Reference source not found.=1 OR 2 (£5 ACCEPTABLE) or neither or don't know ASK: For United Utilities to introduce these proposals **earlier than planned**, with work starting in 2021, there will be a further addition to customers' water bills. How acceptable do you find these five initiatives if there was an additional increase of £1.50 to the average **annual** water bill **from 2025** (that is a £6.50 addition in total)?

IF Error! Reference source not found.Y=1 OR 2 (£3 ACCEPTABLE) or neither or don't know ASK: For United Utilities to introduce these proposals **earlier than planned**, with work starting in 2021, there will be a further addition to customers' water bills. How acceptable do you find these five initiatives if there was an additional increase of £1 to the average **annual** water bill **from 2025** (that is a £4 addition in total)?

IF Error! Reference source not found.Z=1 OR 2 (£1.50 ACCEPTABLE) ASK: For United Utilities to introduce these proposals **earlier than planned**, with work starting in 2021, there will be a further addition to customers' water bills. How acceptable do you find these five initiatives if there was an additional increase of 50p to the average **annual** water bill **from 2025** (that is a £2 addition in total)?

Very acceptable

Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Q28a **IF Error! Reference source not found.=1 OR 2 ASK:** Why do you think this is acceptable?

Q28b **IF Error! Reference source not found.=4 OR 5 ASK:** Why do you think this is unacceptable?

Q28Y **IF Error! Reference source not found.=4 OR 5 (UNACCEPTABLE) AND Error! Reference source not found.=1 OR 2 (£5 ACCEPTABLE) ASK:** How acceptable do you find these five initiatives with work starting in 2021 if there was a total increase of £5.50 on the average **annual** water bill **from 2025** (that is an addition of 50p to the £5 mentioned earlier)?

IF Error! Reference source not found.=4 OR 5 (UNACCEPTABLE) AND IF Error! Reference source not found.Y=1 OR 2 (£3 ACCEPTABLE) ASK: How acceptable do you find these five initiatives with work starting in 2021 if there was a total increase of £3.90 on the average **annual** water bill **from 2025** (that is an addition of 90p to the £3 mentioned earlier)?

IF Error! Reference source not found.=4 OR 5 (UNACCEPTABLE) AND IF Error! Reference source not found.Z=1 OR 2 (£1.50 ACCEPTABLE) ASK: How acceptable do you find these five initiatives with work starting in 2021 if there was a total increase of £1.95 on the average **annual** water bill **from 2025** (that is an addition of 45p to the £1.50 mentioned earlier)?

Very acceptable
Acceptable
Neither unacceptable nor acceptable
Unacceptable
Very unacceptable
Don't know

Classification Questions

We now need to ask you a few questions about you and your household. These will only be used to ensure we have spoken to a wide range of customers. All responses you give will be kept strictly confidential.

Q27. How would you describe the occupation type of the chief income earner in your household?

Senior managerial or professional
Intermediate managerial, administrative or professional
Supervisor; clerical; junior managerial, administrative or professional
Manual worker (with industry qualifications)
Manual worker (with no qualifications)
Unemployed
Retired
Student
Prefer not to say **SKIP TO SEG**

Q28. **IF Q27=7 (RETIRED), ASK ELSE SKIP** Does the chief income earner have a state pension, a private pension or both?

State only
Private only
Both
Prefer not to say **SKIP TO SEG**

Q29. **IF Q28= PRIVATE OR BOTH, ASK ELSE SKIP** How would you describe the chief income earner's occupation type before retirement?

- Senior managerial or professional
- Intermediate managerial, administrative or professional
- Supervisor; clerical; junior managerial, administrative or professional
- Manual worker (with industry qualifications)
- Manual worker (with no qualifications)
- None of these

SEG CODE AS FOLLOWS:

IF Q27= 1 or 2; SEG = AB

IF Q27= 3 or 4; SEG = C1/C2

IF Q27= 5; SEG = DE

IF Q27= 6; SEG = DE

IF Q27= 8; SEG = C1/C2

IF Q27= 7 and Q28 = State only; SEG = DE

IF Q27= 7 and Q28 = Private only OR Both and Q29= 1; SEG = AB

IF Q27= 7 and Q28 = Private only OR Both and Q29= 2; SEG = AB

IF Q27= 7 and Q28 = Private only OR Both and Q29= 3; SEG = C1/C2

IF Q27 = 7 and Q28 = Private only OR Both and Q29= 4; SEG = C1/C2

IF Q27= 7 and Q28 = Private only OR Both and Q29= 5; SEG = DE

IF Q27= 7 and Q28 = Private only OR Both and Q29= 6; SEG = DE

IF Q27= 9 OR Q28 =4; SEG = Not stated

Q30. Which of the following bands best describes the total annual income of your household, before tax and other deductions?

- Up to £300 (Per Week) / Under £15,600 (Per Year)
- £301-£1000 (Per Week) / £15,601 - £52,000 (Per Year)
- £1001+ (Per Week) / £52,001+ (Per Year)
- Don't know/Prefer not to say

Q31. Do you receive any of the following benefits? *MULTICODE*

- Attendance Allowance
- Carer's Allowance
- Child Tax Credit
- Council Tax Benefit
- Disability Living Allowance
- Housing Benefit
- Income Support (or similar)
- Jobseeker's Allowance
- Pension Credit
- Universal Credit
- Working tax credit
- None of these **NOT WITH ANY OTHER CODE**
- Prefer not to say **NOT WITH ANY OTHER CODE**

Q32. To which of these ethnic groups do you consider you belong to?

- WHITE**
- British
- Irish
- 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
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other Black background

CHINESE OR OTHER ETHNIC GROUP

- Chinese
- Any other ethnic group

Prefer not to say

Q33. Thinking about all the people in your household, including yourself, how many people live here for each of these age groups: **For each age group, please select the option that applies to you. If there are no people in your household belonging to a certain age group, please select 'zero' for it.**

- Up to 5 years 0..... 1..... 2..... 3..... 4..... 5+
- 6 to 15 years 0..... 1..... 2..... 3..... 4..... 5+
- 16 to 65 years 0..... 1..... 2..... 3..... 4..... 5+
- Over 65 years 0..... 1..... 2..... 3..... 4..... 5+

Prefer not to say

Q34. Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do?

MULTI ALLOWED FOR 1 AND 2

- Yes, myself
- Yes, someone in my household
- No
- Prefer not to say

IF CODE 1 OR 2 = DISABILITY

Q35. Do you or anyone in your household suffer from any long-term illness or condition that significantly affects your water requirements? For instance, needing to use extra water for bathing, laundry or anything that impacts on your water usage?

- Yes, myself
- Yes, someone in my household
- No
- Prefer not to say

IF CODE 1 OR 2 = HIGH WATER NEED

Q36. Are you on WaterSure, Charitable Trust or another special tariff from your water company that helps towards the cost of your water bill?

Yes
No
Don't know
Prefer not to say

IF CODE 1 = WATERSURE

Q37. These days, with the current state of the economy, a lot of people are struggling to pay their household bills. Which of the following best describes how affordable you find your water and sewerage bill and other household bills? Please remember, this research is entirely confidential and that it is only by talking to people in debt, or struggling to pay their bills, that change can be influenced.

I always pay my water bill, and other household bills, on time
I always pay my water bill on time, but sometimes struggle, or am late, paying other bills
I sometimes pay my water bill late
I often find it difficult to pay my water bill on time
I am rarely, or never, able to pay my water bill on time
Prefer not to answer

IF CODE 2 OR 3 = STRUGGLING

IF CODE 4 OR 5 = IN DEBT

Q38. Which of these best describes you?

I have never used the internet
I have used the internet but do not have regular access to it
I have regular access to the internet
Prefer not to answer

IF CODE 1 OR 2 = DIGITALLY EXCLUDED

Q39. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other related research for United Utilities?

Yes, for both clarification and further research
Yes, for clarification only
Yes, for further research only
No

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

SYSTEM INFORMATION

Time interview completed: