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## Social Tariffs 2020 Research Report

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# Executive Summary

DJS Research were commissioned by NWG to quantify customer support for an increase to the cross subsidy for their existing social tariff. In total, 1,930 surveys were conducted with bill paying household NWG customers in the Northumbrian Water and Essex & Suffolk Water operating areas.

Surveys were conducted between 15<sup>th</sup> May 2020 and the 11<sup>th</sup> June 2020. An online approach was adopted, using a combination of emails and text messages to distribute the survey. Each method's response rate was 4% and 2%, respectively.

DJS Research had previously undertaken Social Tariffs research for NWG in 2016, following which NWG successfully implemented its first customer cross subsidised social tariff. Further research was conducted in 2018, leading to an increased contribution from customers specifically for low-income pensioners. Against the backdrop of great economic uncertainty brought about by Covid-19, this new research was designed to inform customers of the current social tariff and assess their willingness to contribute additional cross subsidy towards funding discounts for general customers struggling to pay their bills.

## Awareness of the scheme

As in the 2016 and 2018 Social Tariffs research, educating and informing customers was key to the success and validity of the research. Customers were initially provided with background on the current scheme and their existing level of contribution, then were asked whether they were aware of the scheme already in place.

- Overall, 26% of NWG customers were aware of the scheme.
- In Northumbrian Water, 26% were aware of the scheme.
- In Essex & Suffolk, 26% were aware of the scheme. There were no differences by sub-region.

Later in the survey, participants were also asked about their awareness of NWG's Priority Services Register (PSR) for customers who require extra support.

- Around half of the overall sample (48%) claimed to be aware of NWG's PSR.
- In Northumbrian Water, 51% were aware of the PSR.

- In Essex & Suffolk, 40% were aware of the PSR.
  - In the Thames region, 35% were aware of the PSR.
  - In the Anglian region, 51% were aware of the PSR.

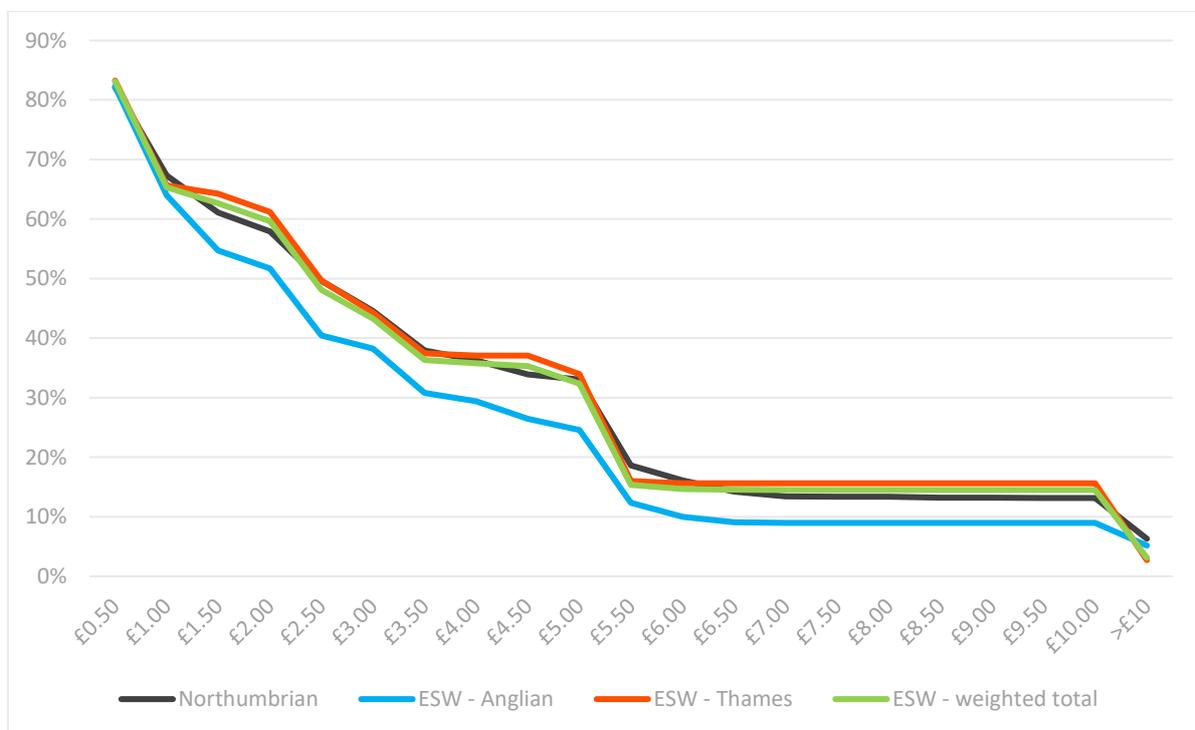
### Willingness to contribute extra

Next, a thorough explanation of who had benefitted from the social tariff and who could benefit from it in the future was provided. Then customers were asked whether they would be willing to contribute additional amounts per year, on top of their current bill, to reduce bills for those who were genuinely struggling to pay their water and wastewater bills. Starting values were between 50p and £5.

- 82% of NW customers and 83% of ESW customers were willing to contribute (WtC) at least an additional 50p towards social tariffs through an increase in their bill.

58% of NW and 60% of ESW customers were willing to contribute at least a further £2, but only 36% of customers were willing to contribute at least a further £4, as shown on the chart below.

**Chart 1: Willingness to contribute additional amounts by region and wastewater company**



Customers on higher incomes were willing to contribute significantly more than customers on low incomes.

## **Key conclusions**

Following on from NWG's Social Tariffs research in 2016 and 2018, there continued to be broad support for a social tariff among their customers. Overall, most (82%) bill payers were willing to contribute at least an extra 50p per year towards social tariffs through an increase in their bill.

58% of NW and 60% of ESW customers were willing to contribute at least an extra £2, but only 36% of customers were willing to contribute at least a further £4.

Those on low household incomes (less than £16,500 a year) were significantly less likely to be willing to contribute anything additional towards social tariffs (NW: 20%; ESW: 25%) than those on high household incomes (£30,000pa or more) – NW: 12%; ESW: 7%. Those on high incomes were also likely to be willing to contribute significantly more (a mean of £4.98 in NW and £4.57 in ESW) than those on low incomes (£3.45 in NW and £2.41 in ESW).

Whilst awareness of social tariffs was greatest amongst customers from lower socio-economic groups (DE, 35% aware) and who always struggled to pay their bills (42% aware), work still needs to be done to ensure that the customers who most need bill reductions are made aware of their eligibility for social tariffs.

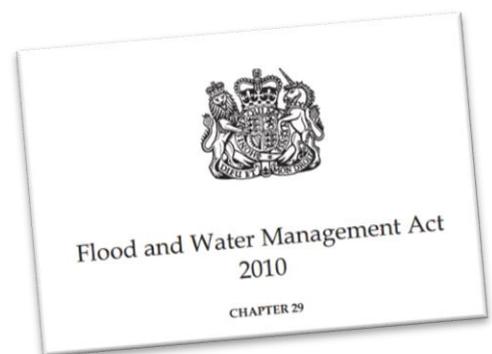
# Background

Northumbrian Water (NWG) serves 4.5m customers in the North East and South East of England. Its vision is to become the national leader in the provision of sustainable water and wastewater services.

NWG is also committed to providing an unrivalled customer experience to all of its customers, and particularly those in circumstances that could make them vulnerable. NWG has various support schemes in place to help customers who struggle to pay their bills, and an Extra Care register for customers in circumstances which could make them vulnerable.

## Social tariffs

Social tariffs enable companies to reduce charges for individuals who would otherwise have difficulty paying their bills. They work by using a cross subsidy system to discount the bills of those struggling to pay. They came into force following the passing of the Flood and Water Management Act 2010<sup>1</sup>.



In 2015 further guidance about affordability and support for vulnerable customers was published. The Government had withdrawn eligibility for many benefits, and many incomes were falling in real terms due to the economic downturn, while household bills were increasing.

According to CCWater, at the end of 2017-18 there were 393,143 customers in England and Wales receiving help through social tariffs. This was a 51% increase since 2016-17 and 191% from 2015-16.<sup>2</sup> This suggests that the water industry as a whole is moving in the right direction by providing lower bills to customers who might otherwise struggle to pay.

<sup>1</sup> [http://www.legislation.gov.uk/ukpga/2010/29/pdfs/ukpga\\_20100029\\_en.pdf](http://www.legislation.gov.uk/ukpga/2010/29/pdfs/ukpga_20100029_en.pdf)

<sup>2</sup> <https://www.ccwater.org.uk/wp-content/uploads/2018/10/Affordability-and-vulnerability-in-the-water-sector-2017-18.pdf>

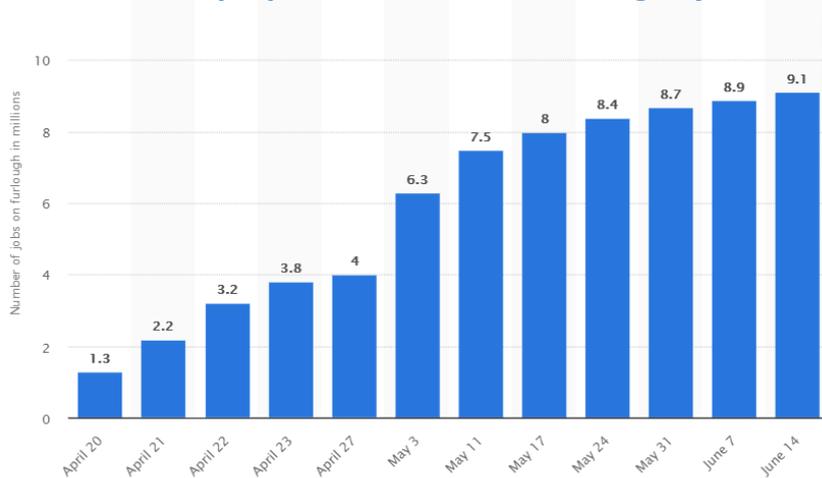
Research carried out by DJS Research in 2016/17 found that the majority of NWG customers supported the idea of a social tariff. NWG were then able to introduce a cross subsidy to support their social tariff. 60% of their customers in both its regions supported a cross-subsidy of 50p to 75p. NWG consulted its customers again in 2018/19 about support for an additional cross subsidy for a social tariff earmarked for pensioners on low incomes, again receiving support for an additional contribution.

It is important to note that this new survey was taking place during an unprecedented time. The Covid-19 pandemic necessitated the UK population to live under 'lockdown' and customers who took part would have been feeling a great deal of uncertainty about the future – particularly financially.

**The number of customers per 10,000 household connections that are registered for customer-funded social tariffs**

Water and Sewage Companies	2013-14	2014-15	2015-16	2016-17	2017-18
Anglian	N/A	N/A	5.27	21.63	26.75
Dwr Cymru	N/A	N/A	22.60	144.31	393.43
Northumbrian	N/A	N/A	6.91	19.57	27.66
Severn Trent	N/A	N/A	24.22	85.91	86.30
South West	15.10	36.53	56.35	84.06	105.97
Southern	N/A	N/A	48.84	139.64	226.65
Thames	N/A	4.92	34.70	55.33	87.16
United Utilities	N/A	N/A	41.55	96.24	144.12
Wessex	65.02	77.17	81.51	113.01	199.35
Yorkshire	N/A	N/A	39.77	56.90	62.71
Water only Companies	2013-14	2014-15	2015-16	2016-17	2017-18
Affinity	N/A	150.49	277.22	311.87	344.63
Bournemouth	N/A	N/A	N/A	N/A	11.91
Bristol	87.32	111.17	125.66	154.52	221.23
Cambridge	N/A	N/A	N/A	24.53	77.73
Dee Valley	N/A	N/A	N/A	10.80	39.40
Essex and Suffolk	N/A	N/A	3.76	6.82	11.97
Hartlepool	N/A	N/A	N/A	N/A	N/A
Portsmouth	N/A	N/A	N/A	93.77	176.19
South East	N/A	N/A	49.13	100.67	173.56
South Staffs	N/A	N/A	N/A	67.94	163.64
Sutton and East Surrey	N/A	106.02	210.38	213.63	294.13

**The number of people across the UK on furlough by date**



At the time of writing, c.9.1 million jobs had been furloughed across the UK<sup>3</sup>, lockdown rules were only just beginning to ease, and the media were reporting predictions of a slow economic recovery, with millions of jobs lost.

The aim of this research was to measure whether or not customers would be willing to contribute more towards the NWG general social tariff through a cross-subsidy charge on their water and/or wastewater bill, and which amount(s) would be acceptable.

<sup>3</sup> <https://www.statista.com/statistics/1116638/uk-number-of-people-on-furlough/>

# Objectives

The main objective of this research was to quantify household customer support for an expanded social tariff.

This research sought to understand the extent to which customers would be willing to increase their contribution to a social tariff (i.e. in monetary terms) to support a range of customers most in need.

More specifically, NWG wished to:

- Measure awareness of NWG's social tariffs
- Measure whether customers were willing to increase how much they funded a social tariff, through a cross-subsidy charge on their water and/or wastewater bill
- Understand how willingness to contribute varied by household income, gender and socio-economic group.

# Methodology

A quantitative approach was adopted for this piece of research.

The fieldwork consisted of an online survey, conducted with a cross section of NWG customers. A random list of customer contact details was securely provided by NWG, including name, email address and phone number.

A total of 1,930 surveys were completed by NWG household bill payers between 15<sup>th</sup> May 2020 and 11<sup>th</sup> June 2020. 1,488 of these were with Northumbrian Water customers, and 442 were with Essex & Suffolk Water customers.

The whole sample was sent a link to the survey, via email or text message. 28% of completions came from a desktop whilst 72% of completions came from a mobile device.

In the absence of being able to target demographically, quotas were unable to be set to ensure that the sample was representative by the regional demographics of gender, age and SEG. As a result, upon completion of the fieldwork, data was weighted to bring it in line with ONS demographic data for each region. Within the ESW region (where NWG supplies only water services), data was also weighted to ensure that the right balance of Anglian (70%) to Thames (30%) wastewater customers was represented. A sample breakdown is provided in the table below.

Additionally, to monitor customers' understanding of the questionnaire and materials, the questionnaire included questions on how easy the survey and materials were to understand. 96% of participants said they found the information and questions in the survey easy to understand, which gives us confidence in the validity of the results.

**Table 1: Sample breakdown (unweighted / weighted data)**

	TOTAL	Northumbrian Water	Essex & Suffolk Water
<b>18-34</b>	15% / 30%	16% / 32%	14% / 25%
<b>35-54</b>	42% / 33%	42% / 32%	42% / 40%
<b>55+</b>	43% / 37%	43% / 37%	44% / 35%
<b>Male</b>	53% / 47%	52% / 46%	56% / 49%
<b>Female</b>	46% / 52%	47% / 53%	43% / 47%
<b>AB</b>	52% / 22%	51% / 18%	56% / 34%
<b>C1</b>	20% / 29%	22% / 28%	15% / 31%
<b>C2</b>	15% / 23%	15% / 25%	15% / 19%
<b>DE</b>	13% / 26%	12% / 29%	15% / 17%

Where figures don't add up to 100%, this is due to rounding or don't know / prefer not to say answers.

# Research findings

Following demographic questions, but before being asked about their willingness to contribute towards an additional cross-subsidy to help customers in need, participants were educated about NWG/ESW's current social tariff and asked whether they were aware of it.

Specifically, customers were presented with the types of customers who currently benefitted from the scheme. All customers were then asked whether they were aware of this scheme that they were contributing to. Everyone answered this question and it was found that:

- Overall, 26% of NWG customers were aware of the scheme.
- There were no differences by sub-region.

Looking across the whole NWG sample, awareness was greatest amongst the lower socio-economic groups (DE, 35% cf. AB, 22%, C1, 21%, C2, 25%) and those with lower household incomes (<£16,500, 32% cf. £16,500- £29,999, 22%, £30,000-£49,999, 24%, £50,000+, 18%).

Similarly, those who always struggled to pay their household bills were more likely to be aware of the current social tariff:

- "I always struggle to pay my household bills and I am often behind in my payments." – 42% aware
- "I struggle to pay my household bills and I am often behind in my payments." – 33% aware
- "I sometimes struggle to pay my household bills, but I usually manage to keep on top of it." – 27% aware
- "I never struggle to pay my household bills." – 22% aware

Additionally, 20% of those on furlough were aware of the current social tariff.

Later in the survey, participants were also asked about their awareness of NWG's Priority Services Register (PSR) for customers who require extra support.

- Around half of the overall sample (48%) claimed to be aware of NWG's PSR.
- In Northumbrian Water, 51% were aware of the PSR.
- In Essex & Suffolk, 40% were aware of the PSR.
  - In the Thames wastewater region, 35% were aware of the PSR
  - In the Anglian wastewater region, 51% were aware of the PSR.

As with awareness of the current social tariff, when looking across the whole sample, awareness of NWG's PSR was greatest amongst the lower socio-economic groups (DE, 55% cf. AB, 44%, C1, 46%, C2, 47%) and among those with lower household incomes (<£16,500, 52% cf. £16,500-£29,999, 44%, £30,000-£49,999, 53%, £50,000+, 36%).

The same pattern of greater awareness amongst those who always struggled to pay their household bills was also found:

- "I always struggle to pay my household bills and I am often behind in my payments." – 66% aware
- "I struggle to pay my household bills and I am often behind in my payments." – 53% aware
- "I sometimes struggle to pay my household bills, but I usually manage to keep on top of it." – 48% aware
- "I never struggle to pay my household bills." – 47% aware

Additionally, 36% of those on furlough were aware of the PSR.

# Willingness to contribute estimates

## Starting point analysis

Starting points for the willingness to contribute (WtC) exercise were evenly split across all respondents, as per the below:

- £0.50 = 17% started here
- £1.00 = 17% started here
- £1.50 = 16% started here
- £2.00 = 16% started here
- £4.00 = 17% started here
- £5.00 = 17% started here

We have learned from statistical analysis conducted as part of the 2018 research that there are no significant differences in reported willingness to contribute levels by starting point, meaning those with higher starting points do not end up with higher WtC values.

## Willingness to contribute extra

82% of NW customers and 83% of ESW customers were willing to contribute at least an additional 50p towards the social tariff through an increase in their bill. The difference in the proportion of customers willing to contribute towards the social tariff between the regions was not statistically significant.

The average (mean) additional amount that NW customers were willing to contribute towards the social tariff was £3.92 per year. Amongst ESW customers, the average was £3.55 (£3.39 for those served by Anglian and £3.59 for those served by Thames). The differences in average WtC between the wastewater providers did not reach statistical significance.

"It will help a significant number of people without me having to worry about being able to pay my bill."

"I'm struggling a bit too but I know there are people who find it harder than me."

"I feel that around £5 per year per person is a reasonable contribution. I am retired and have a fixed income myself. I am not struggling but need to be careful with my funds."

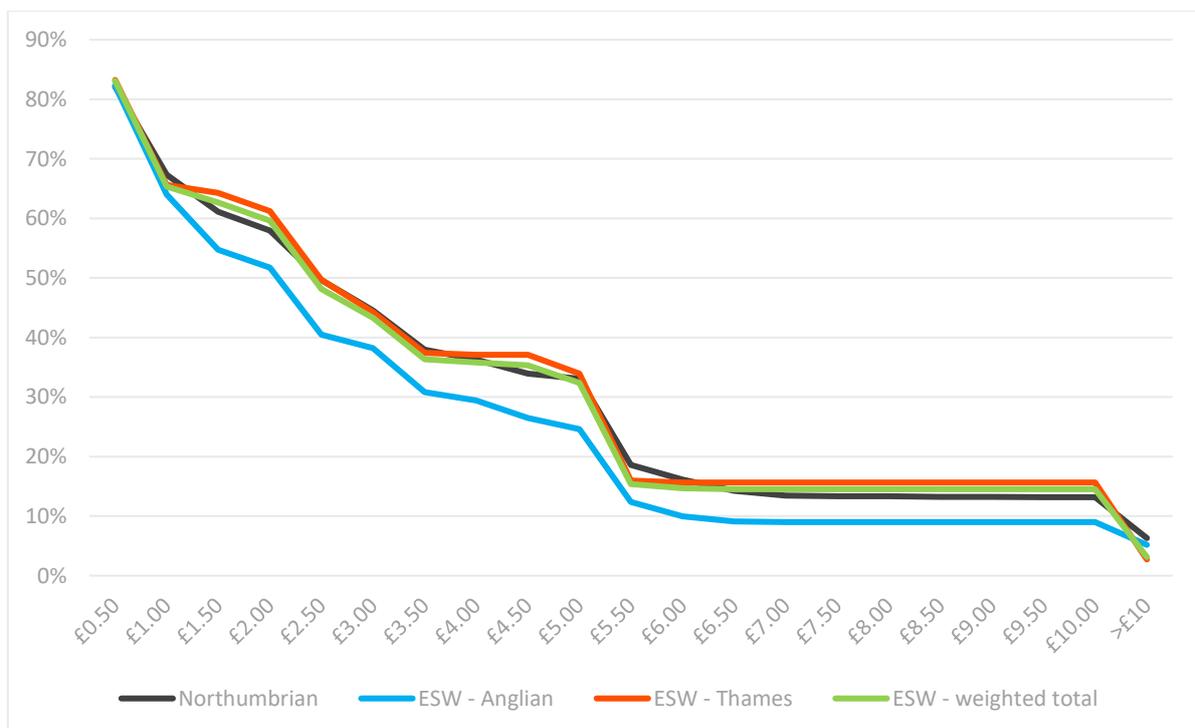
**Table 1**

	<b>% of people expressing zero Willingness to Contribute anything extra (£0)</b>	<b>Average WtC estimate</b>	<b>95% confidence interval</b>
Northumbrian Water (1488)	18%	£3.92	(£3.62, £4.21)
Essex & Suffolk Water (442)	17%	£3.55	(£3.10, £4.01)
Essex & Suffolk Water (Anglian) (332)	17%	£3.39	(£2.71, £4.06)
Essex & Suffolk Water (Thames) (110)	17%	£3.59	(£2.72, £4.46)

We also examined the proportion of people who would be willing to contribute something extra at each price point.

**58%** of NW and 60% of ESW customers were willing to contribute at least an additional £2, but only 36% of customers were willing to contribute at least an additional £4, as shown on the chart below.

**Chart 1: Willingness to contribute by region and wastewater provider**



WtC something extra towards a social tariff among ESW customers was noticeably higher for Thames Water wastewater customers than for Anglian Water wastewater customers. However, the difference in average contribution was not significantly different.

An alternative way of viewing this data is to look at the additional amount that 50% of customers were willing to contribute, which is displayed in the table below. Most NW customers were willing to contribute at least a further £2.50, and the majority of ESW customers were willing to contribute at least an additional £2.00.

**Table 2: Amount that 50% are willing to contribute extra**

	<b>Amount that 50% of customers are willing to contribute extra</b>
Northumbrian Water (1,488)	£2.50
Essex & Suffolk (442)	£2.00
Essex & Suffolk Water (Anglian) (332)	£2.00
Essex & Suffolk Water (Thames) (110)	£2.50

The willingness to contribute extra at each price point is also shown in Table 3 below.

**Table 3: % willing to contribute extra at each price point**

<b>% willing to contribute extra at each price point (number of customers)</b>	<b>Northumbrian Water (1,488)</b>	<b>Essex &amp; Suffolk (442)</b>	<b>Essex &amp; Suffolk - Anglian (332)</b>	<b>Essex &amp; Suffolk - Thames (110)</b>
Less than 50p <i>only</i>	18%	17%	18%	17%
At least 50p	82%	83%	82%	83%
At least £1	67%	65%	64%	66%
At least £1.50	61%	63%	55%	64%
At least £2	58%	60%	52%	61%

At least £2.50	50%	48%	40%	50%
At least £3	45%	43%	38%	44%
At least £3.50	38%	36%	31%	37%
At least £4	36%	36%	29%	37%
At least £5	34%	35%	26%	37%

# Focus on income

We spoke to customers across a range of household incomes, which were coded into three income bands:

- Less than £16,500
- £16,500-£29,999
- £30,000 or more.

We examined whether differences in willingness to contribute existed between income bands.

## Willingness to contribute extra

Information about household income was provided by 89% of customers. Significantly greater proportions of ESW customers on low incomes reported a zero willingness to contribute anything additional (25%), whilst significantly fewer of those earning £30,000 or more reported a zero value (7%). The difference between incomes of NW customers was less marked, with 20% of low-income NW customers reporting a zero willingness to contribute anything additional and 12% of high-income NW customers, but this difference was still statistically significant at the 95% confidence level.

The highest earners were willing to contribute an additional average of £4.98 towards the NW social tariff and £4.57 in ESW. Low income households were willing to contribute an additional average of £3.45 in NW and £2.41 in ESW.

**Table 4: Zero willingness to contribute anything extra, and average extra amounts willing to contribute, by income group by water company**

Income group	% of people expressing zero Willingness to contribute anything extra (£0)		Average additional WtC estimate	
	NW	ESW	NW	ESW
Less than £16,500	20%↑	25%↑	£3.45↓	£2.41↓
£16,500-29,999	20%↑	20%	£3.92	£4.14
£30,000 or more	12%↓	7%↓	£4.98↑	£4.57↑

↑ significantly higher than average within region

↓ significantly lower than the average within region

**Table 5: % willing to contribute extra at each price point, by income group and region**

% willing to contribute extra at each price point (number of customers)	NW			ESW		
	Less than £16,500	£16,500-29,999	£30,000 or more	Less than £16,500	£16,500-29,999	£30,000 or more
Less than 50p <i>only</i>	20%	20%	13%	26%	20%	7%
At least 50p	80%	80%	87%	74%	80%	93%
At least £1	61%	69%	77%	48%	69%	81%
At least £1.50	54%	63%	72%	47%	68%	78%
At least £2	52%	59%	68%	46%	60%	76%
At least £2.50	43%	49%	62%	35%	51%	63%
At least £3	38%	44%	56%	27%	46%	59%
At least £3.50	31%	39%	49%	26%	40%	47%
At least £4	30%	37%	46%	25%	40%	47%
At least £5	27%	32%	44%	19%	40%	42%

# Focus on SEG

We spoke to customers from different socio-economic groups and examined whether differences in willingness to contribute anything extra existed between groups.

## Willingness to contribute extra

Willingness to contribute an extra amount towards NWG social tariffs was significantly lower than average for customers in the C2 group for both regions. This was surprising perhaps because contributions from this group were even lower than the DE group in both regions. The highest average additional amount customers were willing to contribute was noted in ABs for NW customers and in C1s for ESW customers.

**Table 6: Zero willingness to contribute anything additional, and average extra amounts willing to contribute, by SEG and region**

SEG	% of people expressing zero Willingness to contribute anything extra (£0)		Average additional WtC estimate	
	NW	ESW	NW	ESW
AB	13%↓	16%	£5.07↑	£3.98
C1	17%	11%↓	£4.36	£4.61↑
C2	22%↑	16%	£2.96↓	£1.73↓
DE	18%	30%↑	£3.57	£3.41

↑ significantly higher than average within region

↓ significantly lower than the average within region

**Table 7: % willing to contribute extra at each price point, by SEG and region**

% willing to contribute extra at each price point (number of customers)	NW				ESW			
	AB	C1	C2	DE	AB	C1	C2	DE
Less than 50p <i>only</i>	13%	17%	22%	18%	16%	11%	16%	31%
At least 50p	87%	83%	78%	82%	84%	89%	84%	69%
At least £1	76%	71%	60%	65%	67%	81%	54%	48%
At least £1.50	72%	64%	55%	57%	63%	80%	52%	47%
At least £2	70%	60%	50%	54%	58%	79%	46%	47%
At least £2.50	61%	51%	44%	45%	52%	69%	18%	45%
At least £3	57%	44%	40%	41%	48%	64%	13%	39%
At least £3.50	50%	41%	34%	31%	42%	48%	12%	38%
At least £4	48%	39%	32%	30%	41%	48%	12%	37%
At least £5	45%	36%	28%	27%	39%	48%	7%	27%

# Focus on Age (1)

We spoke to customers from different age groups and examined whether differences in willingness to contribute anything extra existed between them.

## Willingness to contribute

Willingness to contribute additional funds was significantly higher among the youngest NW customers, and among older customers in the ESW region.

**Table 8: Zero willingness to contribute additional funds, and average amount willing to contribute, by age group and region**

Age	% of people expressing zero Willingness to contribute anything extra (£0)		Average additional WtC estimate	
	NW	ESW	NW	ESW
under 35	15%	10%	£4.78↑	£3.99
35-54	20%	22%↑	£3.45	£3.10↓
55-74	19%	19%	£3.63	£3.45
75+	17%	3%↓	£3.09↓	£5.34↑

↑ significantly higher than average within region

↓ significantly lower than the average within region

**Table 9: % willing to contribute additional funds at each price point by age group and region**

% willing to contribute additional funds at each price point (number of customers)	NW				ESW			
	under 35	35-54	55-74	75+	under 35	35-54	55-74	75+
Less than 50p <i>only</i>	15%	20%	19%	17%	10%	22%	19%	3%
At least 50p	85%	80%	81%	83%	90%	78%	81%	97%
At least £1	73%	63%	66%	72%	69%	56%	69%	94%
At least £1.50	68%	57%	59%	61%	68%	53%	66%	93%
At least £2	65%	53%	56%	61%	65%	52%	60%	93%
At least £2.50	57%	44%	49%	42%	55%	40%	46%	93%
At least £3	50%	38%	46%	41%	51%	33%	45%	69%
At least £3.50	42%	32%	41%	28%	36%	32%	37%	69%
At least £4	40%	29%	40%	28%	35%	32%	36%	68%
At least £5	38%	27%	35%	25%	34%	28%	30%	68%

# Focus on Age (2)

We spoke to customers from different age groups and examined whether differences in willingness to contribute anything extra existed between age groups.

## Willingness to contribute extra

Willingness to contribute additional funds was highest among younger customers, and significantly so among younger NW customers. Willingness to contribute anything extra was lowest for customers aged 35-54 in both regions, and significantly lower for ESW customers.

**Table 10: Zero willingness to contribute anything extra, and average additional amount willing to contribute, by age group and region**

Age	% of people expressing zero Willingness to contribute anything extra (£0)		Average additional WtC estimate	
	NW	ESW	NW	ESW
under 35	15%	10%	£4.78↑	£3.99
35-54	20%	22%↑	£3.45	£3.10↓
55+	19%	17%	£3.58	£3.70

↑ significantly higher than average within region

↓ significantly lower than the average within region

**Table 11:** % willing to contribute extra at each price point by age group and region

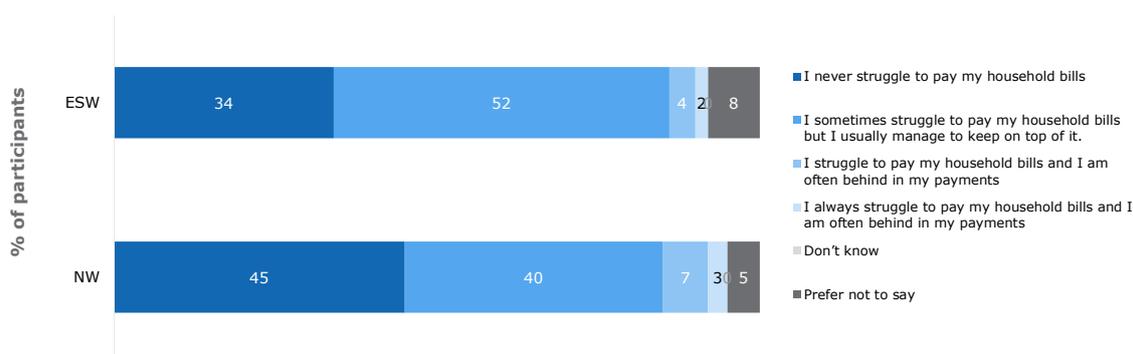
% willing to contribute additional funds at each price point (number of customers)	NW			ESW		
	under 35	35-54	55+	under 35	35-54	55+
Less than 50p <i>only</i>	15%	20%	19%	10%	22%	17%
At least 50p	85%	80%	80%	90%	78%	83%
At least £1	73%	63%	65%	69%	56%	72%
At least £1.50	68%	57%	58%	68%	53%	70%
At least £2	65%	53%	55%	65%	52%	64%
At least £2.50	57%	44%	47%	55%	40%	52%
At least £3	50%	38%	44%	51%	33%	48%
At least £3.50	42%	32%	39%	36%	32%	41%
At least £4	40%	29%	38%	35%	32%	40%
At least £5	38%	27%	33%	34%	28%	35%

# Financial standing & employment status

## Financial position

Amongst those surveyed, at least half from both regions were struggling in some capacity to pay their household bills (NW 50% NET struggle; ESW 58% NET struggle).

### Financial position

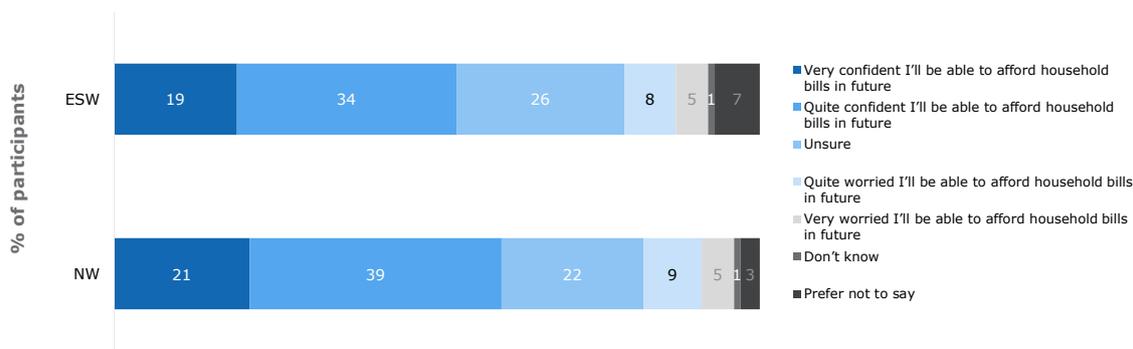


Q07. Which of the following best describes your financial position? **Base:** all respondents (1930). NW (1488), ESW (442).

## Future confidence of paying household bills

When asked how they felt about their ability to afford household bills in the future, 14% of NW participants and 13% of ESW participants were feeling worried about this.

### Future confidence in ability to pay bills

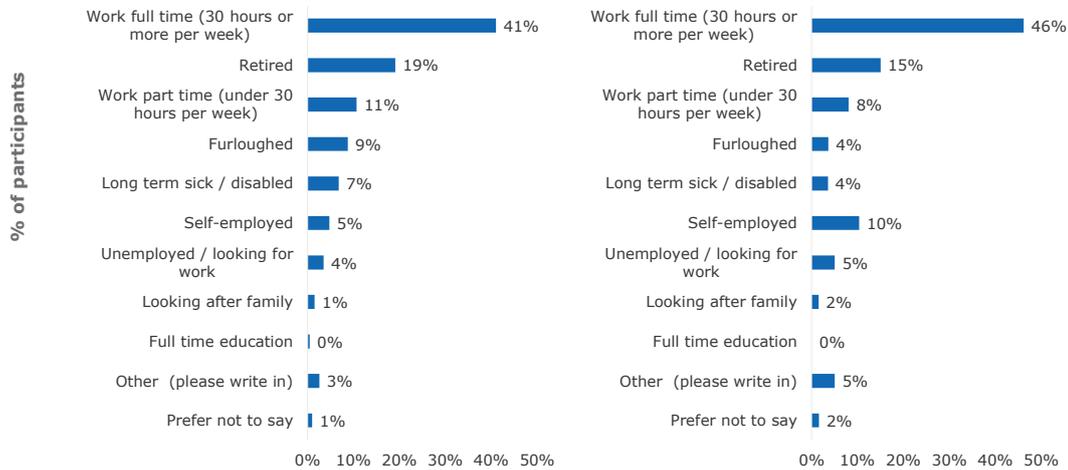


Q07a. At the moment, how do you feel about your ability to afford household bills in future? **Base:** all respondents (1930). NW (1488), ESW (442).

## Employment status

Employment status by region is shown below. While 9% of NW participants had been furloughed, only 4% of ESW participants had.

## Future confidence in ability to pay bills



**Q07a.** At the moment, how do you feel about your ability to afford household bills in future? **Base:** all respondents (1930). NW (1488), ESW (442).

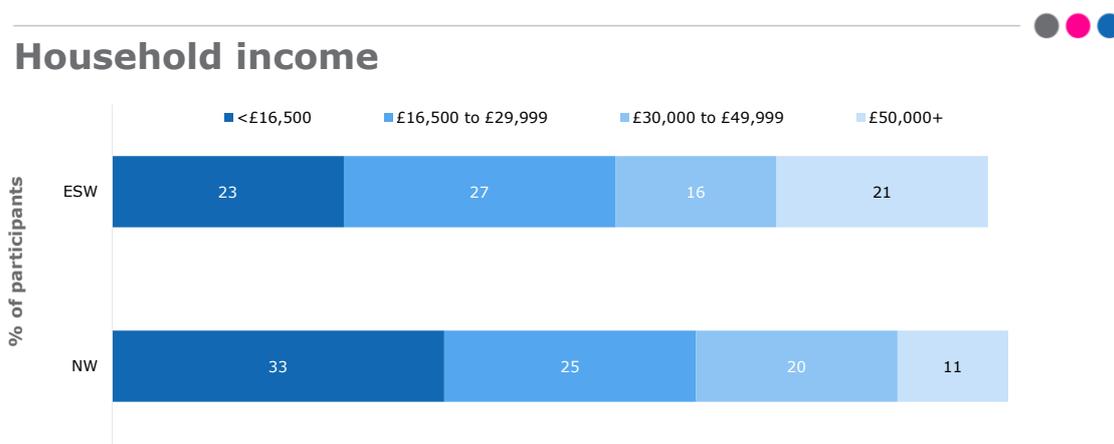
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# Inclusivity of the survey

A range of questions was also included to allow NWG to understand how inclusive the survey was. The below charts display the proportion of participants who completed the survey, with the data analysed by a range of sub-groups.

## Household income

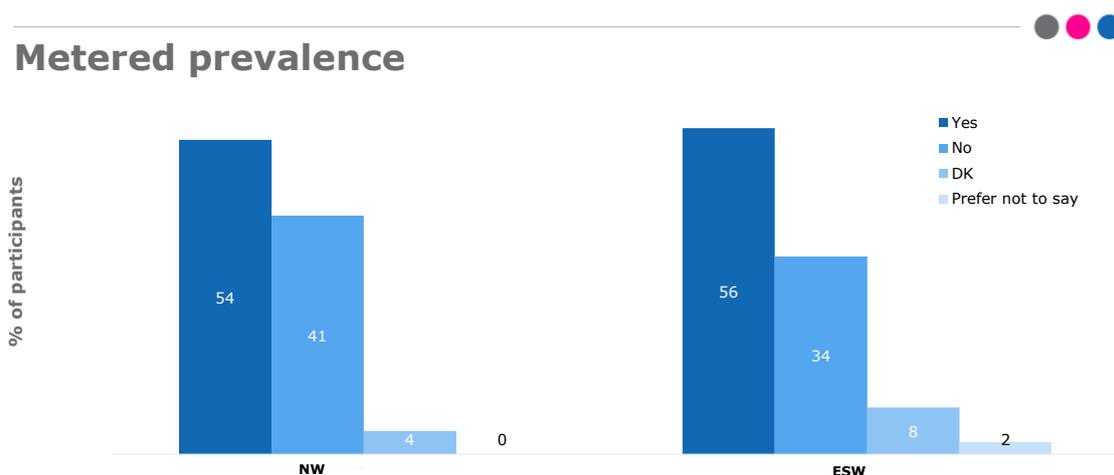
A spread by household income was achieved, although regional differences were apparent:



Q06. Which of the following income bands does your household fit into? **Base:** all respondents (1930). NW (1488), ESW (442).

## Metered prevalence

Metered prevalence was similar across regions.



Q04. Do you have a water meter? **Base:** all respondents (1930). NW (1488), ESW (442).

## Direct payments

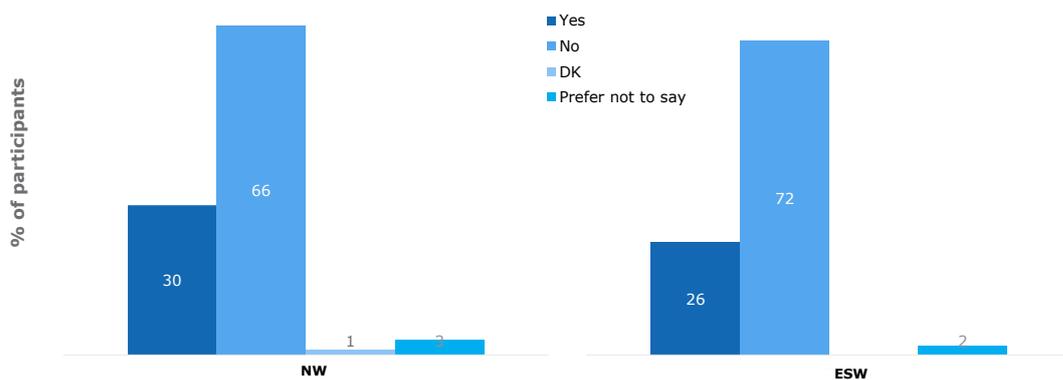
The majority of participants were paying for their water and wastewater services directly.

- 99% of NW participants were paying NWG directly for water and wastewater.
- 97% of ESW participants were paying ESW directly for water.

## Receipt of benefits

Just under one-third (30%) of NW participants and around one-quarter (26%) of ESW participants had someone in their household in receipt of benefits or tax credits.

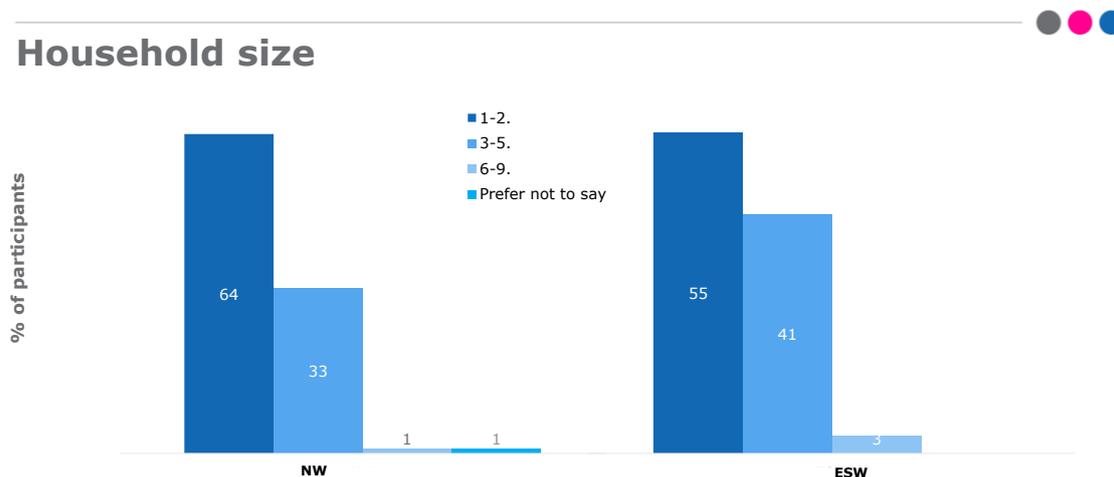
### In receipt of benefits?



Q09. Does anyone in your household currently receive any benefits or tax credits? **Base:** all respondents (1930). NW (1488), ESW (442).

## Household size

Over half of participants in both the NW (64%) and ESW (55%) regions resided in two-person households.

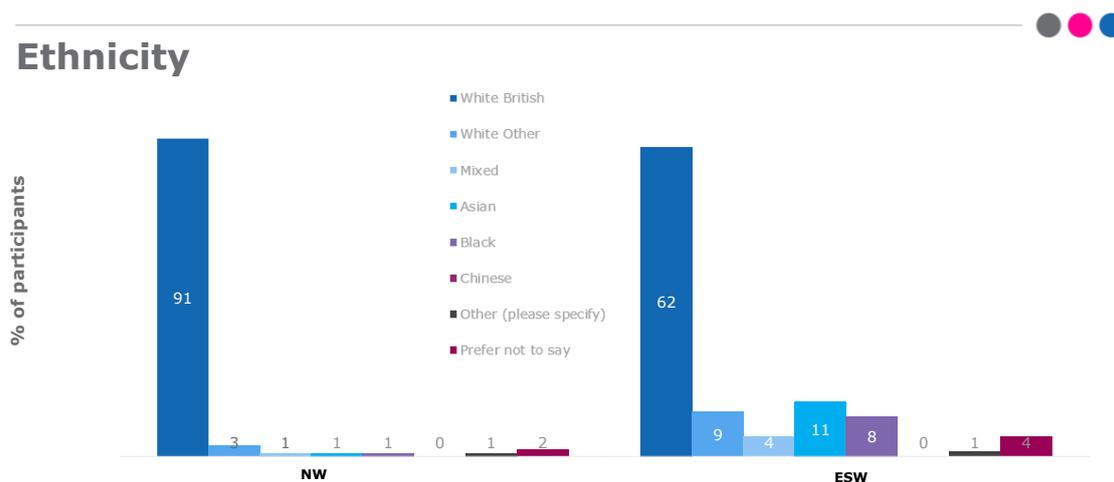


Q10. How many people are in your household, including yourself? **Base:** all respondents (1930). NW (1488), ESW (442).

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## Ethnicity

Greater ethnic diversity was observed in the ESW region than in the NW region, reflecting regional profiles.

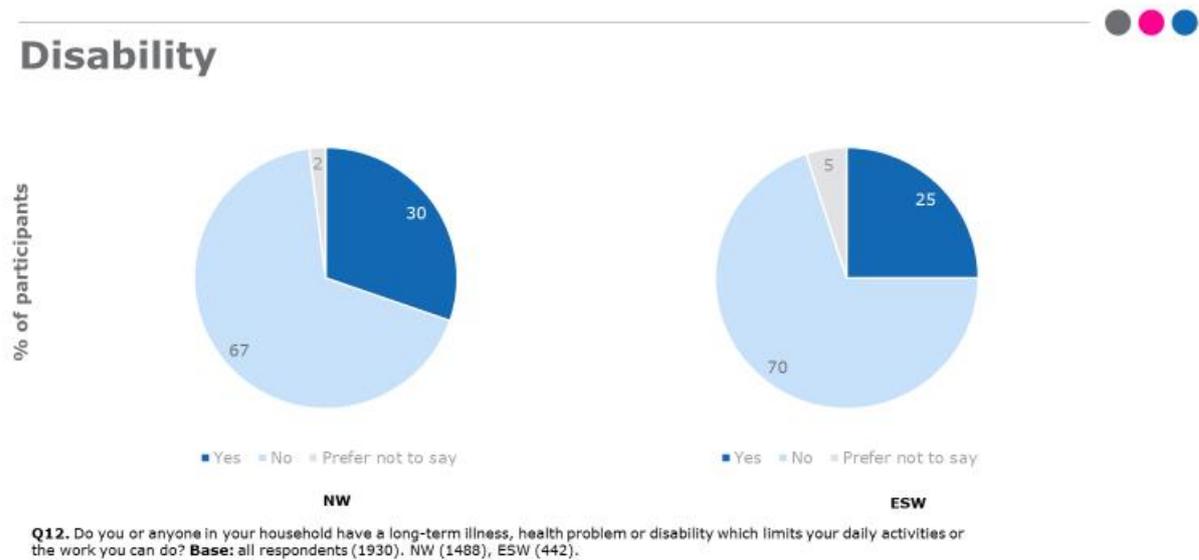


Q11. How would you describe your ethnic background? **Base:** all respondents (1930). NW (1488), ESW (442).

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## Disability

One in three NW participants (30%) and a quarter (25%) of ESW participants were living with someone who had a long-term illness, health problem or disability.

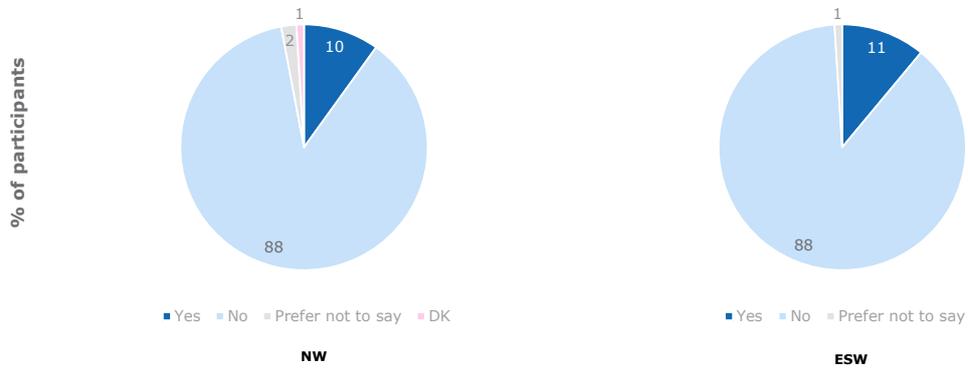


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## Learning difficulties

Across both regions, one in ten participants were living with someone who had some form of learning disability.

## Learning difficulties



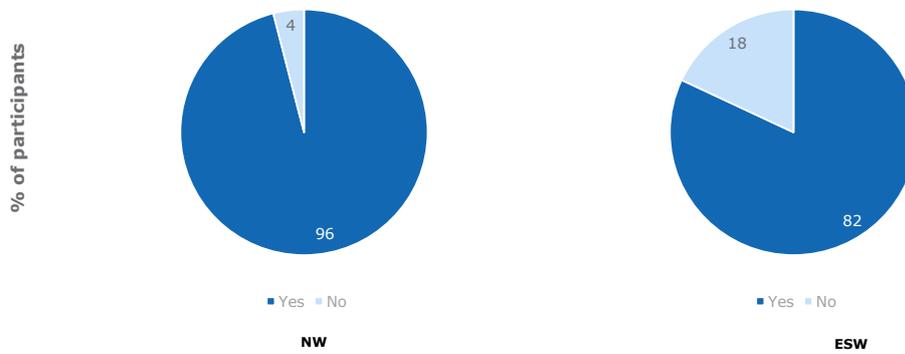
Q13. Do you or anyone in your household have any learning difficulties? **Base:** all respondents (1930). NW (1488), ESW (442).

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## English as a Second Language

4% of NW participants and 18% of ESW participants had English as a second language.

## ESOL



Q14. Is English your first language? **Base:** all respondents (1930). NW (1488), ESW (442).

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**NORTHUMBRIAN  
WATER** *living water*

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