



# Northumbrian Water Group

Social Tariffs

Research report

July 2023

# Executive summary

## Overview of research

Northumbrian Water Group (NWG) commissioned research with the aim of quantifying household customers' support for NWG's proposed PR24 social tariff, within both the Northumbrian Water and Essex & Suffolk Water operating regions.

The social tariff scheme is a tiered discount scheme to reduce the bills of household customers whose total household income is less than £17,0005 (£21,749 for customers in a London Borough), and whose annual water and sewerage bill is more than 3% of their net household income (after housing costs, rent and mortgage payments), or a household where someone receives Pension Credit, and where the annual water and sewerage bill is 3% or more of the net household income (after housing costs, rent or mortgage payments). The social tariff is funded by a cross subsidy from non-qualifying customers. To allow for more customers to access the scheme going forward, there will be a requirement for a greater customer contribution than in the current scheme, with acceptability of this having been measured in this research.

The objective of this research was to:

- Quantify whether household customers of NWG in both the Northumbrian Water and Essex & Suffolk Water regions are willing to increase their contribution towards the social tariff and whether the proposed amounts are acceptable.

## Research methodology

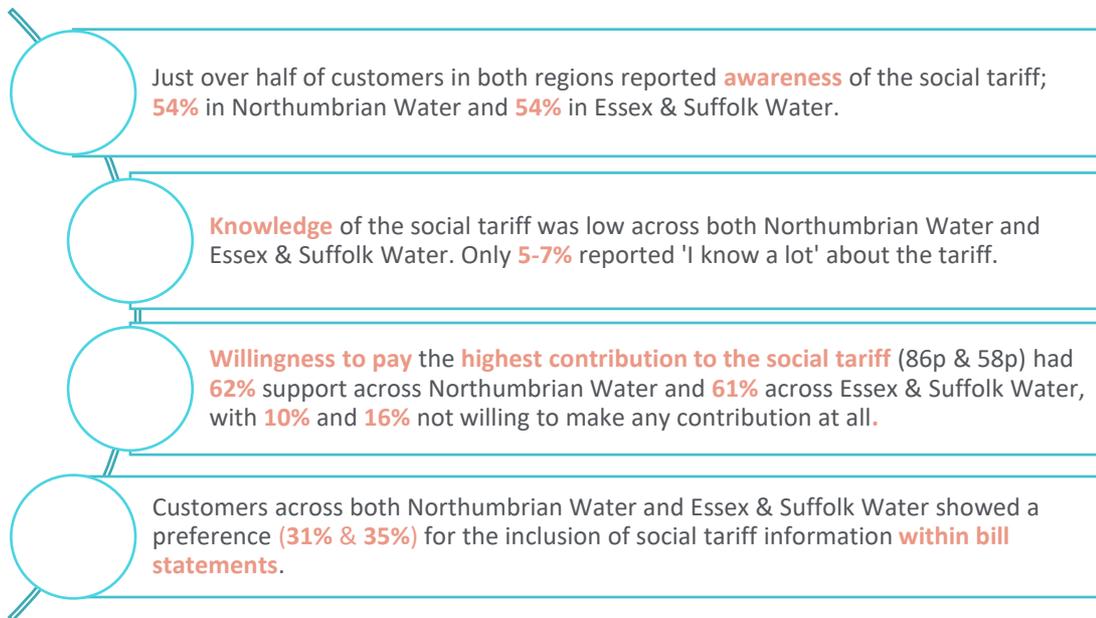
A quantitative survey was conducted to meet the research objective. Household customers from both regions were recruited via a research panel provider.

Within the survey, respondents were asked to express their support or opposition to several proposed bill increase options for the social tariff.

A sample size of n=500 was attained for Northumbrian Water and n=569 for Essex & Suffolk Water. Sampling was conducted through natural fallout whereby no quotas were placed on demographics and the target sample sizes were based on what was felt to be feasible by the research panel provider. This was done to ensure fieldwork completion within a short period of time to enable the results to be fed into the PR24 Affordability and Acceptability Testing. Weighting has been applied to the analysis to

ensure results presented are reflective of the Northumbrian Water and Essex & Suffolk Water customer bases.

## Summary of findings



As shown in the table below, the majority of customers across both Northumbrian Water and Essex & Suffolk Water supported the highest level of contribution towards the social tariff. This does not include those who responded neutrally (i.e. I don't mind either way) per pence amount.

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	62%
68p to support a further 157,416 households	60%
52p to support a further 135,012 households	65%
36p to support a further 112,608 households	65%
18p to support a further 90,204 households	68%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	61%
50p to support a further 44,000 households	61%
42p to support a further 37,000 households	57%
33p to support a further 29,000 households	59%
25p to support a further 22,000 households	64%
<b>Not willing to contribute anything extra</b>	<b>16%</b>

When the percentage of neutral respondents (i.e. I don't mind either way) are taken as supportive of the social tariff pence amounts, the figures of support increase across both Northumbrian Water and Essex & Suffolk Water regions.

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	79%
68p to support a further 157,416 households	79%
52p to support a further 135,012 households	80%
36p to support a further 112,608 households	82%
18p to support a further 90,204 households	85%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	75%
50p to support a further 44,000 households	76%
42p to support a further 37,000 households	73%
33p to support a further 29,000 households	75%
25p to support a further 22,000 households	77%
<b>Not willing to contribute anything extra</b>	<b>16%</b>

# Contents

Executive summary .....	2
Overview of research .....	2
Research methodology .....	2
Summary of findings .....	3
Contents .....	5
Introduction .....	7
Project background .....	7
Objectives .....	8
Methodology .....	8
Survey methodology .....	9
Notes on analysis .....	11
Survey data management.....	13
Survey findings .....	15
Customer awareness of the social tariff. ....	16
Customer knowledge of the social tariff.....	17
Customer willingness to increase their contribution towards the social tariff.....	18
Conclusions .....	27
Appendix 1 – online survey – Northumbrian Water .....	30
Appendix 2 – online survey – ESW .....	46
Appendix 3 – Respondent profile (Northumbrian Water) .....	62
Appendix 4 – Respondent profile (Essex & Suffolk Water) .....	69
Appendix 5 – Weighted and unweighted respondent profiles.....	76
Appendix 6 – Awareness of the social tariff by key demographics .....	78
Appendix 7 – Customer knowledge of the social tariff by key demographics .....	90
Appendix 8 – Willingness to contribute towards the social tariff by key demographics .....	101

The logo for 'explain' is located in the top left corner. It consists of the word 'explain' in a lowercase, sans-serif font, with a small speech bubble icon to its right. The entire logo is contained within a white speech bubble shape that has a tail pointing towards the bottom left.

explain

The background of the slide is a teal-colored overlay on a photograph of a woman with long dark hair, smiling and looking to her right. She is wearing a light-colored, possibly white, button-down shirt. The overall aesthetic is clean and professional.

**“Quality is never an  
accident it is always the  
result of intelligent  
effort”**

## **Introduction**

An overview of the project background, objectives and methodology.

# Introduction

## Project background

Northumbrian Water Group (NWG) commissioned Explain to conduct research designed to explore and quantify household customers' support for NWG's proposed PR24 social tariff.

The social tariff scheme is a tiered discount scheme to reduce the bills of household customers whose total household income is less than £17,0005 (£21,749 for customers in a London Borough), and whose annual water and sewerage bill is more than 3% of their net household income (after housing costs, rent and mortgage payments), or a household where someone receives Pension Credit, and where the annual water and sewerage bill is 3% or more of the net household income (after housing costs, rent or mortgage payments). The social tariff is funded by a cross subsidy from non-qualifying customers. To allow for more customers to access the scheme going forward, there will be a requirement for a greater customer contribution than in the current scheme, with acceptability of this having been measured in this research.

This project represents an alternative approach to research already conducted by Northumbrian Water Group to measure social tariff acceptability. The initial research involved a sample of Northumbrian Water and Essex & Suffolk Water household customers who were recruited from the Northumbrian Water Group internal database and weighted by ACORN grouping. However, when compared to the research findings of other water companies, Northumbrian Water Group was an outlier. The approach taken for this new round of research was aligned with the approach taken by the other water companies in terms of sample recruitment and the framing of acceptability questions. All research was conducted in consultation with CCW and NWG's Independent Customer Engagement Panel.

It is important to note that the UK cost of living crisis remains a continual thought in the national psyche, exacerbated by further Bank of England interest rate increases. This has had an effect on utilities, including water bills, which may have influenced awareness of the social tariff and support for increases in contributions toward the social tariff.

To note, results have varied across iterations of this research, with overall support for social tariff increases shifting. This is attributed to the change in method, question style, format and wording that is now aligned to the rest of the industry.



## Objectives

The objective of this research was to:

- Quantify whether household customers of NWG in both the Northumbrian Water and Essex & Suffolk Water regions are willing to increase their contribution towards the social tariff and whether the proposed amounts are acceptable.

## Methodology

To meet the research objective, an online quantitative survey was conducted. This was carried out with existing Northumbrian Water and Essex & Suffolk Water household customers recruited via a research panel provider. This approach involves the acquisition of a sample from a panel provider, which itself is an organisation that has a large number of people across demographics consensually participating in surveys in exchange for an incentive. As panel providers compile a large amount of data throughout their period of operation, using this method of sample recruitment allows targeting of individuals by demographic factor, such as geographic area, which was used in this research. While targeting is accurate, screening criteria was placed on those invited to the survey to ensure they were in fact household customers of Northumbrian Water or Essex & Suffolk Water, predominantly by asking them to select who their current water company is. If the respondent did not select that they were served by Northumbrian Water or Essex & Suffolk Water, or that they did not know, or preferred not to say they were disqualified from the survey.

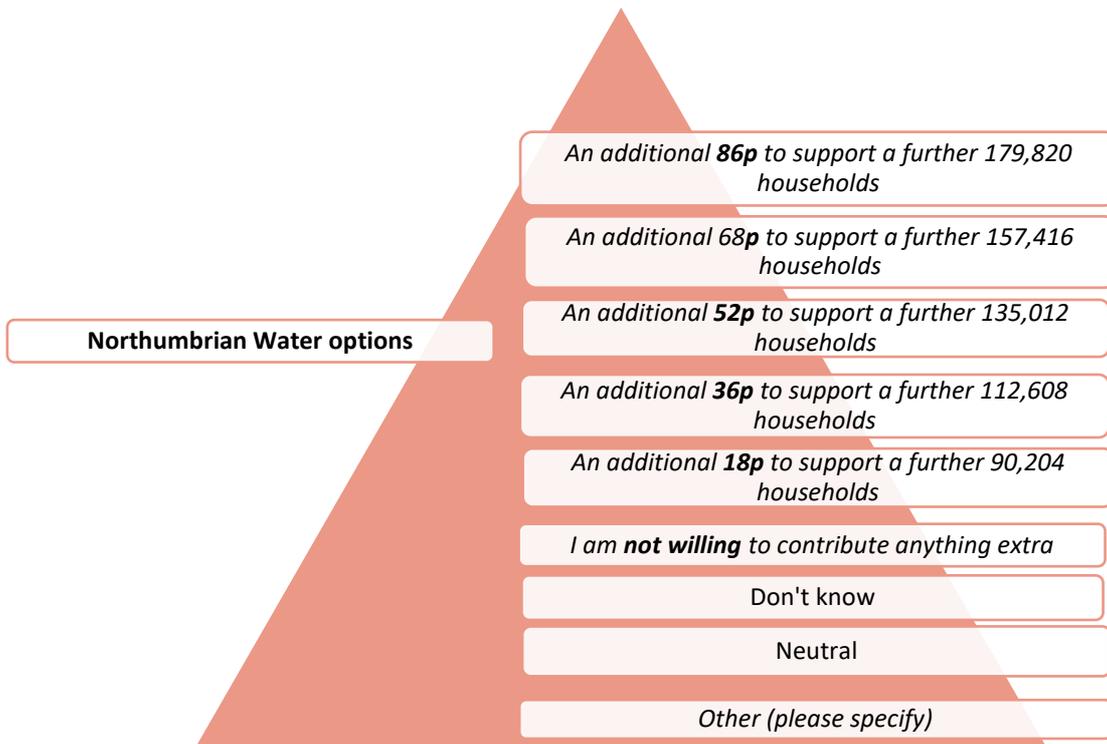
As this research was conducted through a research panel, social tariff benefactor or contributor status could not be determined. However, respondents who stated *'I struggle to pay my household bills and I am often behind on my payments'* or *'I always struggle to pay my household bills and I am often behind in my payments'* are more likely to qualify for the social tariff and subgroup analysis reflects this (Appendices 6 to 8).

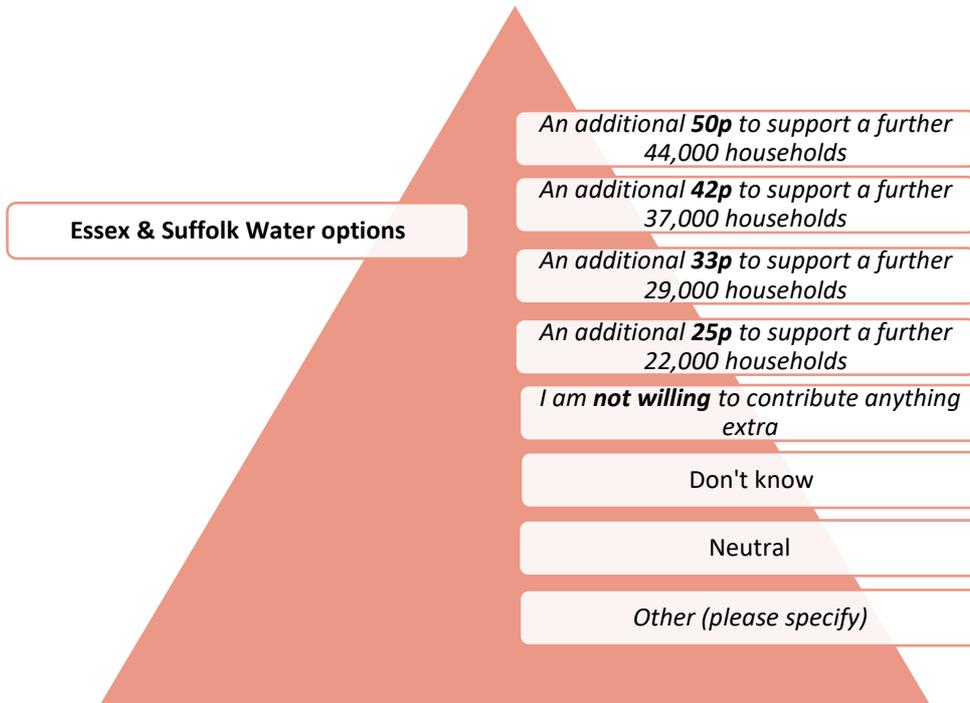
As noted, the research panel method was selected to ensure consistency with the wider industry. Defra encourages water companies to be positive in their interpretation of results and conduct research until a consensus of acceptance is achieved. As both Northumbrian Water and Essex & Suffolk Water had not returned majority acceptance of the highest social tariff amount contribution, this is why this approach was taken to further measure support and facilitate acceptance of the higher pence amount. CCW and NWG's Independent Customer Engagement Panel were engaged throughout this research and had sight of the proposed methodology and survey design with the opportunity to challenge and comment.



## Survey methodology

The survey was designed by Explain, in close collaboration with NWG’s strategic customer research team and Head of Income. The surveys can be found in Appendices 1 (NW) and 2 (ESW). Within the survey, the following options for social tariff contributions were listed and support for each measured.





The research required a sample that incorporated both Northumbrian Water and Essex & Suffolk Water household customers, with the final survey completed by 500 Northumbrian Water and 569 Essex & Suffolk Water household customers. The target sample sizes were based on what was felt to be feasible by the research panel provider. Sampling was conducted through natural fallout whereby no quotas were placed on demographics. This was done to ensure fieldwork completion within a short period of time to enable the results to be fed into the PR24 Affordability and Acceptability Testing. Weighting has been applied to the analysis based on age, gender and socio-economic group to ensure results presented are reflective of the Northumbrian Water and Essex & Suffolk Water customer bases. A detailed respondent profile breakdown can be found in Appendices 3 and 4.



In relation to SEG, each classification refers to the occupation of a household's main earner. This is shown in the table below.

Description	Coded response
Higher managerial, administrative or professional	SEG AB
Intermediate managerial, administrative or professional	
Supervisory or clerical and junior managerial, administrative or professional	SEG C1
Skilled manual worker	SEG C2
Semi or unskilled manual worker	SEG DE
Casual worker, or dependant on state welfare	
Don't know	Don't know
Prefer not to say	Prefer not to say

## Notes on analysis

Weighting of the data was performed to ensure that the sample composition was representative of household customers within the Northumbrian Water and the Essex & Suffolk Water regions in terms of gender, age and SEG. The impact of weighting on the base sizes is shown in Appendix 5 of this report.

Analysis of the survey data for Northumbrian Water and Essex & Suffolk Water was conducted after data cleansing and the data weighting. Initially, a topline assessment of the key areas of social tariff awareness, knowledge and price acceptability was undertaken. After validation of total results was confirmed, a z-test was conducted on all demographic subgroupings to determine statistical significance. Research was conducted at a 95% confidence level, with the achieved samples of n=500 for Northumbrian Water and n=569 for Essex & Suffolk Water returning a 4% margin of error.

Subgroups that returned a significant difference, excluding significant differences between 'other' and 'prefer not to say' options, are included in this report in the relevant graphs per key area. This analysis can be found in Appendices 6 to 8.

Due to the small base sizes of a number of subgroups and the natural fallout of other subgroups with small bases, the % levels of agreement, awareness and knowledge should be viewed as indicative not definitive representations of the group they belong to. While statistical significance is present for some



groups with small bases, this is the result of large differences in % levels that surpass the comparative error rating, but are not inherently a sign of statistical validity.

A number of terms below have been further clarified for ease of reading as they are referenced throughout the reports:

- Weighting refers to the manipulation of data, particularly specific subgroup(s) to match a pre-defined demographic profile of a total population. In this instance weighting was applied separately to SEG, gender and age demographics of the total number of survey completes for Northumbrian Water and Essex & Suffolk Water separately. Resultantly, the total sample for both these service areas are now representative of their respective SEG, gender and age breakdowns. Weighting is a standard practice in data management to ensure representativeness and does not affect the % figure for a given subgroup but can alter the total % figure.
- Statistical significance refers to a finding that is unlikely to occur solely by chance or a random factor. For example, if group A is significantly more likely to dislike apples than group B, this result is not due to factors relating to sample size, margins of error, confidence levels, randomness or chance.
- A Z-test is the means in which statistical significance is determined, whereby two subgroups (samples) can be compared in their response %. This difference is calculated against a comparative error rating, if the difference is greater than the comparative error rating then the difference is determined to be significant. For example, subgroup A has a sample base of 100 people and 10% like apples, while subgroup B has a sample base of 500 people and 18% like apples. Although the two groups have a largely different sample base, the comparative error is only 6.77, meaning the 8% difference between subgroups A and B is significant.

Splits reaching statistical significance, and thus included in the report, are as follows. These are included in the Appendices 6, 7 & 8:

Significant splits charted		
Social tariff awareness	Social tariff knowledge	Price acceptability
Age	Age	Age
Income	Income	Income
SEG	SEG	SEG
Finances	Finances	Finances
Employment status	Employment status	Employment status



Benefits	Benefits	Benefits
Meter status	Household size	Meter status
Household size	Long-term illness	Household size
Long-term illness	Learning difficulties	Long-term illness
Learning difficulties	Financial difficulties	Learning difficulties
Financial difficulties	Ethnicity	Financial difficulties
Ethnicity		Ethnicity
		First language
		Payment means

Finally, data shown does not include responses for other, don't know or prefer not to say. However, the percentages shown in charts and tables are reflective of the whole sample, including don't know, other or prefer not to say.

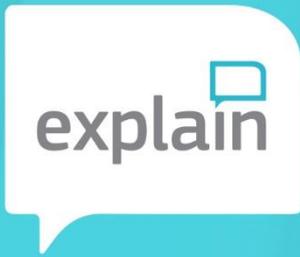
## Survey data management

Full demographic details of survey respondents are detailed in Appendices 3 and 4. The table below shows the total number of completes following data cleansing and removal of entries that returned 'bad data'. This term is inclusive of illogical verbatim (gibberish, random characters and profanities), survey speeding (completing the survey faster than 1/3 of the estimated survey length) and flatliners (select the first choice on all questions in order to complete the survey quicker). Partial completes were also excluded and all figures displayed in the table below and throughout the report refer to those who wholly completed the survey and submitted their responses.

The sample sizes achieved were in line with the initial target samples of 500 to 600 per region, which was based on what the research panel felt could be feasibly achieved.

Total no. completes	
Essex & Suffolk	569
Northumbrian	500
<b>Total:</b>	<b>1,069</b>





**“The best vision is  
insight”**

**Results – online survey**

An in-depth review of the findings of the online survey

# Survey findings

The results of the survey analysis are structured according to the key areas of interest within the survey, as follows:

- 1. Customer awareness of the social tariff**
  - Overall awareness by region
  - Awareness according to key demographics (splits)
- 2. How much customers report knowing about the social tariff**
  - Overall levels of how much is known about the social tariff by region
  - How much is known according to key demographics (splits)
- 3. Customer acceptance of the proposed social tariff increase**
  - Overall willingness to contribute by region
  - Willingness according to key demographics (splits)
- 4. Social tariff communication preferences**
  - Overall communication preferences for the social tariff by region
- 5. Additional questions and comments (open question)**
  - Overall open responses by region

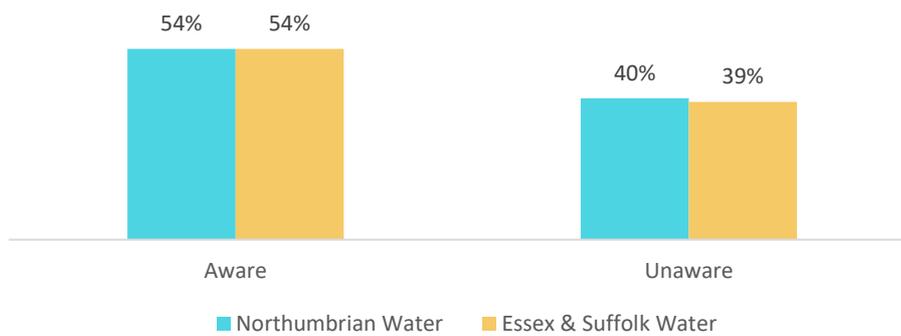
Each will now be discussed in turn.



## Customer awareness of the social tariff.

Overall, there was a high awareness of the social tariff in both regions, with both 54% of Northumbrian Water and Essex & Suffolk Water customers reporting awareness. It is notable that awareness is equal across both regions. It is worth noting that Northumbrian Water Group, Ofwat and the CCW have been running advertising campaigns and may have influenced the increase in awareness from the initial iteration of this research.

Social tariff awareness - Region



## Customer knowledge of the social tariff

Following an initial question on awareness of the tariff, customers were asked how much they knew about the social tariff. However, it is worth noting that this is a self-reported measure.

For both regions, knowledge of the social tariff was low, with half of customers not knowing anything about it – this can be seen outlined below. Knowledge is higher among those who are aware of the social tariff, displaying a correlation between awareness and knowledge levels.

However, knowledge of the social tariff differed per demographic grouping, highlighting key groups to target to further increase their knowledge and understanding of the social tariff. This can be seen in greater detail in Appendix 7.

Levels of knowledge of the social tariff - Northumbrian Water.	
Knowledge level	Percentage of survey respondents
I know a lot	7%
I know quite a lot	7%
I know a little bit	35%
I do not know anything about it	51%

Levels of knowledge of the social tariff – Essex & Suffolk Water.	
Knowledge level	Percentage of survey respondents
I know a lot	5%
I know quite a lot	12%
I know a little bit	35%
I do not know anything about it	48%



## Customer willingness to increase their contribution towards the social tariff

As noted in the methodology section, respondents were first asked if they supported a higher social tariff contribution. In this research an increase to the existing social tariff was tested, with each pence amount increase supporting a varying degree of additional people. This was an addition to the existing social tariff contribution amount, which is 31p for Northumbrian Water and 25p for Essex & Suffolk Water customers. They were then presented with a range of other, lower contribution values and asked to indicate support for each.

For both regions, the majority of respondents were willing to support the higher social tariff contribution of an additional 86p per month for the Northumbrian region and 58p per month for the Essex and Suffolk Water regions. 62% of respondents in the Northumbrian Water region and 61% of respondents in the Essex and Suffolk Water regions were willing to support the higher contribution amount.

Additionally, the majority of respondents in both regions were also willing to support the lower contribution values.

Northumbrian Water	62% were willing to support the higher contribution	61% were willing to support the higher contribution	Essex & Suffolk Water
	10% were not willing to support the social tariff at all	16% were not willing to support the social tariff at all	
	1% returned a don't know response to this question	1% returned a don't know response to this question	



The tables below show the proportion of respondents who were willing to support the different contribution amounts (shown in pence). The results shown are based on the total sample who responded to the survey. Please note, these values are not cumulative as respondents were asked about each value independently. These percentages do not include neutral responses (i.e., 'I don't mind either way').

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	62%
68p to support a further 157,416 households	60%
52p to support a further 135,012 households	65%
36p to support a further 112,608 households	65%
18p to support a further 90,204 households	68%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	61%
50p to support a further 44,000 households	61%
42p to support a further 37,000 households	57%
33p to support a further 29,000 households	59%
25p to support a further 22,000 households	64%
<b>Not willing to contribute anything extra</b>	<b>16%</b>



When the percentage of respondents who were neutral (i.e., 'I don't mind either way') are taken as supportive of the social tariff pence amounts, the figures of support increase across both Northumbrian Water and Essex & Suffolk Water regions.

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	79%
68p to support a further 157,416 households	79%
52p to support a further 135,012 households	80%
36p to support a further 112,608 households	82%
18p to support a further 90,204 households	85%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	75%
50p to support a further 44,000 households	76%
42p to support a further 37,000 households	73%
33p to support a further 29,000 households	75%
25p to support a further 22,000 households	77%
<b>Not willing to contribute anything extra</b>	<b>16%</b>

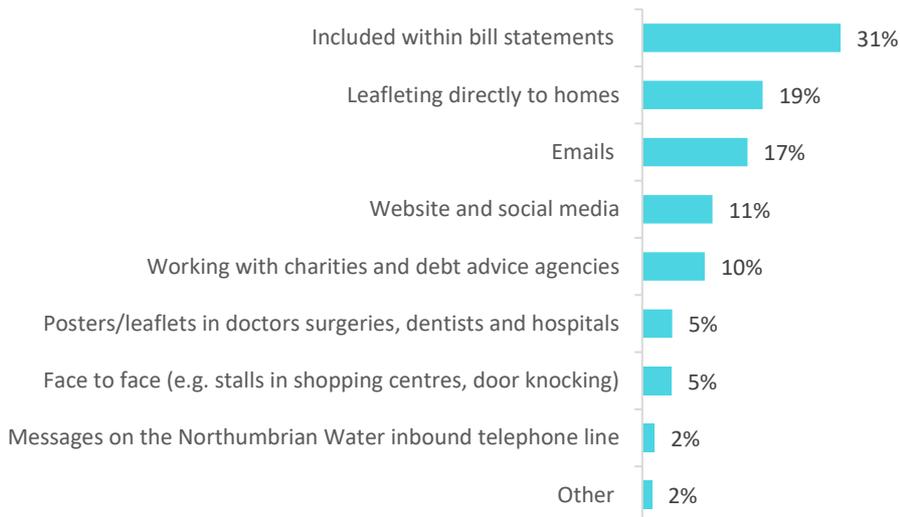


## Communication preferences

Customers were asked to select which communication method they would prefer to hear about the social tariff through. While a range of communication options were presented, a preference for information shared within bill statements was shown in both regions.

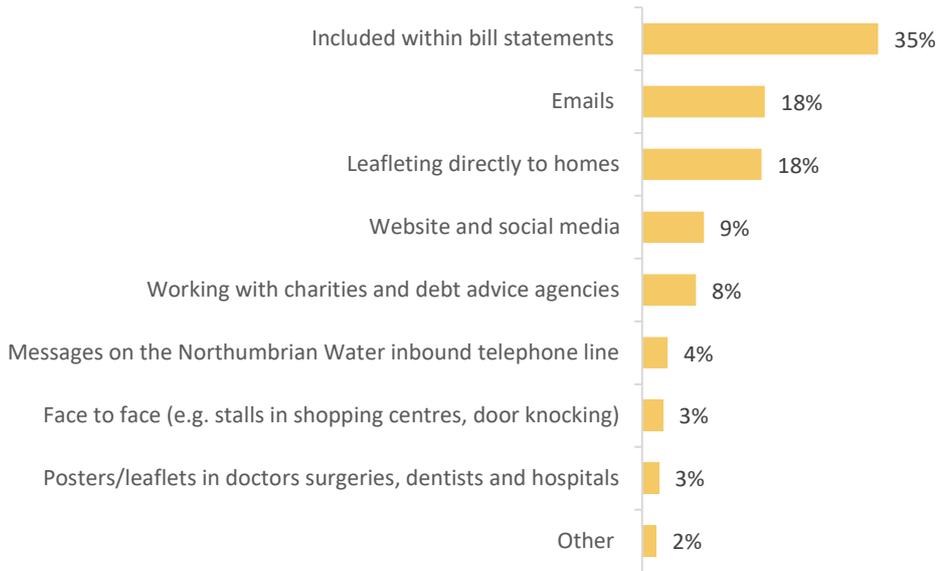
Northumbrian Water customers showed support for information being included within their bill statements, with a smaller number of 19% supporting leafleting directly to homes and 17% supporting emails. As bills can be delivered to customers in both postal and email formats, including this information in the bill statements (either as a package of information or a guide to further reading) may be a cost-effective means of fulfilling communication preferences and limiting logistical costs.

**Communication preferences - Northumbrian Water (500)**



Essex & Suffolk Water customers demonstrated a similar trend to Northumbrian Water customers in relation to social tariff communication preferences. Much like Northumbrian Water, including information about social tariff eligibility within bill statements in a customer's pre-existing bill statement format (postal or email) was preferred.

### Communication preferences - Essex & Suffolk Water (569)



## Further clarifications and critiques: open responses

In both regions, customers were asked for any clarifications they needed. Below are the results of these in coded chart format and quotes from the most dominant codes noted.

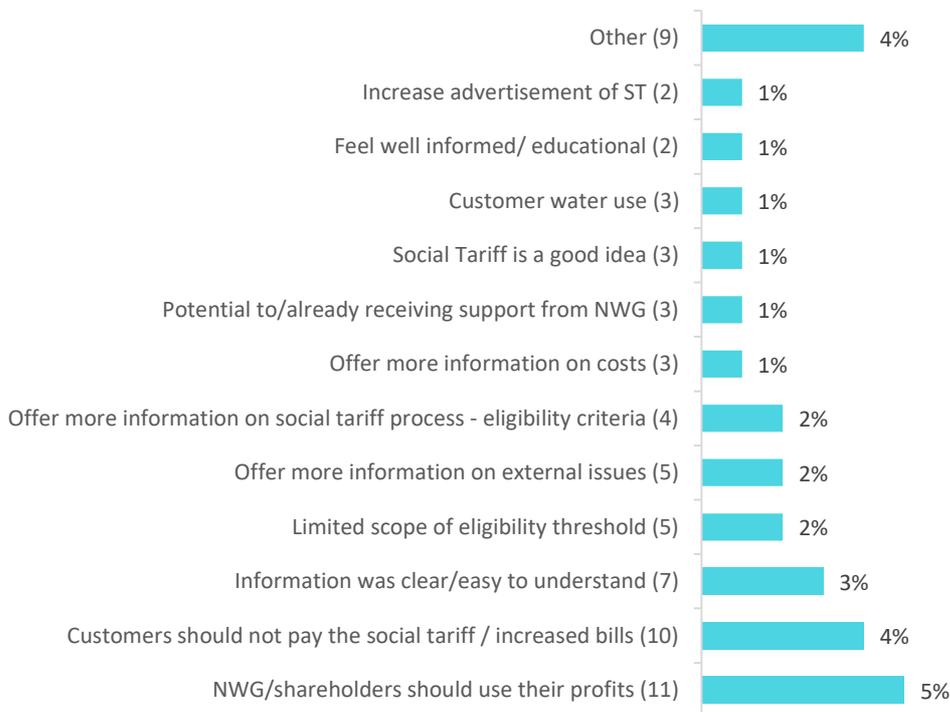
A further note is that the majority of participants responded ‘nothing/no additional questions’, while the most frequent specific code related to the survey itself being good. Reflecting this against Northumbrian Water Group’s research objectives, codes relating to further clarification or critique will be included in charted open response data.

All data displayed in the charts is unweighted. This question was also unforced, which allowed participants the option to answer the question or skip if they chose to. Percentages shown are calculated from the number of participants who provided an answer, not the total sample base.

All coded open responses which do not equal at least 1% have been removed.

For Northumbrian Water customers, the most common theme in the open responses was that NWG/NWG shareholders should use their profits to fund the social tariff. This was followed closely by the statement that customers should not pay for the social tariff via increased bills.

### Additional areas of clarification: open responses - Northumbrian Water (228)



*“I do not understand why bill payers have to pay such things when all water companies are making huge profits. Can water companies clarify why they do not follow the law, and gripe about fines, but then expect bill payers to foot the bill rather than them, who can afford it”*

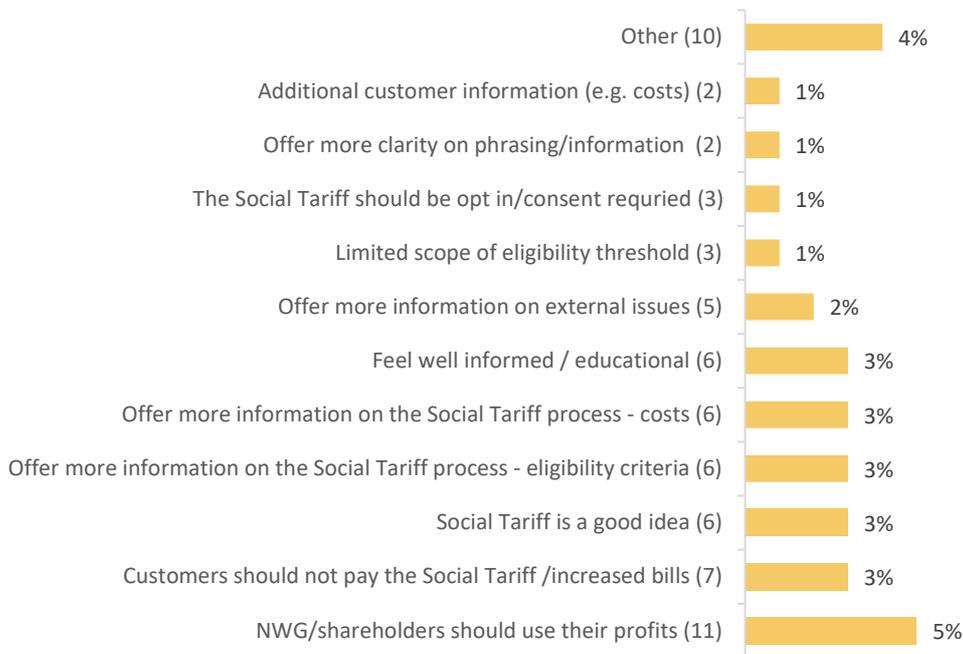
*“I have no problem with NWL helping those on low incomes maintain water supply at reduced rates. However, such assistance should come from NWL themselves by reducing the hideous profits paid to shareholders and not those who work subsidising others when they are struggling to survive the current financial crisis. Also, when are NWL going to stop pumping sewage into our rivers. I am aware of the levels being dumped into my local river in Durham the River Wear”*

*“Everyone should pay for their own water bills, we all have to work and pay our bills yet again why should others pay for other people to get discounts or reduced costs”*



Much like Northumbrian Water, Essex & Suffolk Water customers left similar comments relating to shareholder contributions and that customers should not have to pay an increased bill towards the social tariff.

**Additional areas of clarification: open responses - Essex & Suffolk Water (230)**



*“I don't think customers should be facing increases to help low-income households when Essex & Suffolk profits in March 2022 were reported at 780 million. You could cut costs for everyone and still be making a profit”*

*“Why should I, someone who is under the retirement age, who has been forced to retire early through ill health have to pay to subsidise others who have no interest in working. I have paid tax all my life and find it unfair. Why can't Essex & Suffolk Water pay or take this money out of the dividend payable to their shareholders, they can afford to take the hit”*

*“I do find the constant need to fund people who cannot pay their bills whilst they smoke drink have takeaways and don't live within their means a pain, time we taught people how to live within their means and that they can't have everything, life is tough”*





explain



**“Research should never  
be just for knowledge – it  
should be for progress”**

**Summary of results and conclusions**

A holistic review of the actionable insights.

# Conclusions

Overall acceptance of the social tariff scheme was met with support; customers returned support for the higher contribution values across both Northumbrian Water and Essex & Suffolk Water regions. A minority of customers did question the principle of the scheme itself, querying why they have to pay toward a discount for someone else. Additional comments from this minority of customers called on Northumbrian Water Group to absorb the increased cost from their profits. The below tables do not include those who responded neutral (i.e., 'I don't mind either way') per pence amount.

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	62%
68p to support a further 157,416 households	60%
52p to support a further 135,012 households	65%
36p to support a further 112,608 households	65%
18p to support a further 90,204 households	68%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	61%
50p to support a further 44,000 households	61%
42p to support a further 37,000 households	57%
33p to support a further 29,000 households	59%
25p to support a further 22,000 households	64%
<b>Not willing to contribute anything extra</b>	<b>16%</b>



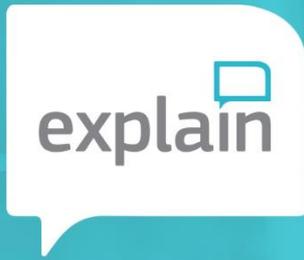
When the percentage of respondents who were neutral (i.e., I don't mind either way) are taken as supportive of the social tariff pence amounts, the figures of support increase across both Northumbrian Water and Essex & Suffolk Water regions.

Levels of support for different social tariff contributions - Northumbrian Water.	
Willing to contribute (per month)	Percentage of survey respondents
86p to support a further 179,820 households	79%
68p to support a further 157,416 households	79%
52p to support a further 135,012 households	80%
36p to support a further 112,608 households	82%
18p to support a further 90,204 households	85%
<b>Not willing to contribute anything extra</b>	<b>10%</b>

Levels of support for different social tariff contributions - Essex & Suffolk Water	
Willing to contribute (per month)	Percentage of survey respondents
58p to support a further 52,000 households	75%
50p to support a further 44,000 households	76%
42p to support a further 37,000 households	73%
33p to support a further 29,000 households	75%
25p to support a further 22,000 households	77%
<b>Not willing to contribute anything extra</b>	<b>16%</b>

Beyond acceptance, customers returned higher levels of awareness of the social tariff than in the previous iteration of the research, but how much they know about the social tariff, a new measure, was low in comparison to awareness. Communication of the social tariff preferences showed that most, but not a majority, of customers across both regions favoured inclusion in their bill statements.





**“Quality is not an act; it is  
a habit”**

## Appendix 1 – online survey – Northumbrian Water



### Northumbrian Water Social Tariff - Panel

#### Introduction

Thank you for clicking through to complete this survey.

This survey is being carried out by Explain Market Research on behalf of Northumbrian Water. It is very important to Northumbrian Water that the views of their customers are taken into account as they shape their business plan.

Northumbrian Water is a water and wastewater company serving 2.7 million customers in the North East of England. They would like to understand your views about a proposed scheme to help more people who are genuinely struggling to afford their water and wastewater bills.

If you have any questions about the research, please contact Thomas at Explain Research via email at [thomas.waldron@explainresearch.co.uk](mailto:thomas.waldron@explainresearch.co.uk)

*This research is being conducted by Explain Market Research on behalf of Northumbrian Water Group. Further details on how we process your data can be found here: <https://www.explainresearch.co.uk/privacy-policy/>*

Next

0%



### Northumbrian Water Social Tariff - Panel

We just need to check that you are eligible to take part in our survey.

Please click 'Next' to continue with the survey.

Back

Next

4%



## Northumbrian Water Social Tariff - Panel

Are you responsible, or jointly responsible, for paying your household water bill?

Please choose one answer only \*

- Yes
- No
- Prefer not to say
- Don't know

[Back](#) [Next](#)

8% 

# NORTHUMBRIAN WATER *living water*

## Northumbrian Water Social Tariff - Panel

Who provides your water supply? Please refer to this map if you are unsure of the area that [Northumbrian Water](#) covers.

Please choose one answer only



- Northumbrian Water
- Hartlepool Water
- United Utilities
- Yorkshire Water
- Thames Water
- Other - (please write in)
- Don't know
- Prefer not to say

[Back](#) [Next](#)

13%



## Northumbrian Water Social Tariff - Panel

Who provides your wastewater service? Please refer to this map if you are unsure of the area that [Northumbrian Water](#) covers. Please choose one answer only \*

- Northumbrian Water
- United Utilities
- Yorkshire Water
- Other - (please write in)
- Don't know
- Prefer not to say

[Back](#) [Next](#)



## Northumbrian Water Social Tariff - Panel

We'd now like to find out a little more about you.

The following questions help Northumbrian Water to understand how the views of different customers are different from each other.

Please click 'Next' to continue with the survey.

[Back](#) [Next](#)





## Northumbrian Water Social Tariff - Panel

Which of the following describes how you think of yourself?

*Please choose one answer only \**

- Male
- Female
- In another way (please tell us more about this)
- Prefer not to say

Which of the following age groups do you fall into?

*Please choose one answer only \**

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to say

Which of the following best describes the main income earner's occupation in your household? (If the main income earner is now retired, please select the category that best reflects their occupation before they retired.)

*Please choose one answer only \**

- Higher managerial, administrative or professional
- Intermediate managerial, administrative or professional
- Supervisory or clerical and junior managerial, administrative or professional
- Skilled manual worker
- Semi or unskilled manual worker
- Casual worker, or dependant on state welfare
- Don't know
- Prefer not to say

Back

Next

25%



## Northumbrian Water Social Tariff - Panel

Are you aware that Northumbrian Water give support to customers who are financially vulnerable? (i.e. on a low income, or in financial difficulties and struggling to afford their water bill)

Please choose one answer only \*

- Yes
- No
- Don't know

Northumbrian Water has a discounted rate to help customers in financial difficulties. How much do you know about this?

Please choose one answer only \*

- I know a lot
- I know quite a lot
- I know a little bit
- I do not know anything about it

Back

Next

29%



## Northumbrian Water Social Tariff - Panel

Northumbrian Water offer a discounted rate to help its most disadvantaged households by reducing their water bills.

Northumbrian Water customers qualify for the social tariff if their household income is under £17,005, and their annual Northumbrian Water bill is more than 3% of their household income (after rent or mortgage payments).

Customers also qualify for the social tariff if someone in the household receives Pension Credit and the annual Northumbrian Water bill is 3% or more of their household income (after housing costs, rent or mortgage payments).

Pension credit is a benefit that tops up weekly income from a person's pension and other earned income to £182.60 for pensioners living on their own and £278.70 if living with a partner.

If you believe you may qualify for this discounted rate, more information can be found at [Financial support \(nwl.co.uk\)](https://www.nwl.co.uk/financial-support)

Back

Next

# NORTHUMBRIAN WATER *living water*

## Northumbrian Water Social Tariff - Panel

These low-income customers receive between a 10% and 50% discount on their bill.

The discounted rate is funded by adding a small amount to the bills of all customers. This is known as a cross-subsidy.

Northumbrian Water does not financially profit at all from this rate and 100% of the contributions are passed directly on to help customers in financial difficulty.

Feedback from Northumbrian Water customers so far is that they accept paying 31p per month (£3.72 per year) on top of their bills in order to provide a discounted rate for low income customers.

All water and wastewater companies have schemes of this type.

The discounts have become even more important as a result of the Cost of Living Crisis.

Northumbrian Water also have a customer debt assistance scheme, funded by Northumbrian Water, which customer debt payments to clear water arrears.

# NORTHUMBRIAN WATER *living water*

## Northumbrian Water Social Tariff - Panel

The discounted rate forms part of a range of support that Northumbrian Water provide to help customers who struggle to pay their water and wastewater bill. Others are:

## How Northumbrian Water already helps customers with their bills

### Low Income Discount (Social Tariff)

Customers on a low income can apply for a bill reduction of up to 50%.

### Payment break

Customers can apply for a short payment break in unexpected circumstances.

### Reduced bill scheme

Funded by Northumbrian Water which can offer up to a 50% discount for customers who cannot afford their essential household bills (verified by an independent advice provider)

### WaterSure

Northumbrian Water can cap a customer's bill if they receive income-related benefits and have a large family, or if they receive income-related benefits and have a medical condition that uses a lot of water.

### Benefit Checker

Northumbrian Water and Policy in Practice have teamed up to help ensure customers know what benefits they are entitled to and how to redeem them.

### Debt support

Northumbrian Water can put customers in touch with StepChange, a debt charity, who can provide advice on debt.



## Northumbrian Water Social Tariff - Panel

Currently Northumbrian Water is helping 65,000 customers each year with this discounted rate but they would like to be able to help more.

Taking account of the current Cost of Living Crisis, Northumbrian Water believe that over 270,000 low income customers may be in need of financial support and would qualify for the discounted rate, and it would like to help all of these additional customers by 2025.

You will now be asked some questions about your willingness to support or oppose the discounted rate through your Northumbrian Water bill in 2023-2025 and beyond.

The costs mentioned EXCLUDE inflation and they represent the ADDITION to your bill to help the additional 270,000 households.

Back Next

46%



## Northumbrian Water Social Tariff - Panel

How far do you support or oppose a discounted rate which would help all 179,820 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 86p per month (£10.32 per year) to helping these low income customers.

Please choose one answer only

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Northumbrian Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 157,416 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 68p per month (£8.12 per year) towards helping these low income customers.

Please choose one answer only

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Northumbrian Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 135,012 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 52p per month (£6.24 per year) towards helping these low income customers.

Please choose one answer only

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Northumbrian Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 112,608 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 36p per month (£4.32 per year) towards helping these low income customers.

Please choose one answer only

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Northumbrian Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 90,204 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 18p per month (£2.70 per year) towards helping these low income customers.

Please choose one answer only

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Northumbrian Water Social Tariff - Panel

Which of the following do you think are the most effective ways for Northumbrian Water to communicate its discounted rate to customers that might eligible?

Please choose one answer only\*

- Included within bill statements
- Working with charities and debt advice agencies
- Messages on the Northumbrian Water inbound telephone line
- Website and social media
- Face to face (e.g. stalls in shopping centres, door knocking)
- Emails
- Leafleting directly to homes
- Posters/leaflets in doctors surgeries, dentists and hospitals
- Other (please specify)

Back

Next

71%



## Northumbrian Water Social Tariff - Panel

Thank you for answering the previous questions, the following questions here to further aid Northumbrian Water in understanding how different groups feel about the proposed changes. As some of these questions are sensitive, the ability to prefer not to say is present.

Please click next to continue with the survey.

Back

Next

75%



## Northumbrian Water Social Tariff - Panel

### And finally

Which of the following statements best describes how easy or difficult you find it to pay your water and wastewater bill each month?

Please choose one answer only \*

- I do not have any problems paying my bill
- I rarely find it difficult to pay my bill
- I sometimes find it difficult to pay my bill
- I frequently find it difficult to pay my bill
- I always find it difficult to pay my bill

Do you have a water meter?

Please choose one answer only \*

- Yes
- No
- Don't know
- Prefer not to say

Do you pay Northumbrian Water directly for your water and wastewater?

Please choose one answer only \*

- Yes
- No – I pay through my rent

Back

Next

79%



## Northumbrian Water Social Tariff - Panel

Which of the following income bands does your household fit into? Please include the income of everyone in the household (before tax and national insurance is deducted) and include any pensions, benefits, or extra earnings.

*Please choose one answer only \**

- Less than £8,500
- £8,500 to £12,999
- £13,000 to £16,499
- £16,500 to £29,999
- £30,000 to £39,999
- £40,000 to £49,999
- £50,000 to £74,999
- £75,000 to £99,999
- £100,000 or more
- Don't know
- Prefer not to say

Which of the following best describes your financial position?

*Please choose one answer only \**

- I never struggle to pay my household bills.
- I sometimes struggle to pay my household bills but I usually manage to keep on top of it.
- I struggle to pay my household bills and I am often behind in my payments.
- I always struggle to pay my household bills and I am often behind in my payments.
- Don't know
- Prefer not to say

Which of the following best describes your current working status?

*Please choose one answer only \**

- Work full time (30 hours or more per week)
- Work part time (under 30 hours per week)
- Self-employed
- Full time education
- Unemployed / looking for work
- Long term sick / disabled
- Retired
- Looking after a family
- Other - Write In
- Prefer not to say

Back

Next

4%



## Northumbrian Water Social Tariff - Panel

Does anyone in your household currently receive any benefits or tax credits?

Please choose one answer only \*

- Yes
- No
- Don't know
- Prefer not to say

How many people are in your household, including yourself?

Please choose one answer only \*

- 1
- 2
- 3
- 4
- 5
- 6-7
- 8-9
- 10 or more
- Prefer not to say

Back

Next

8%



## Northumbrian Water Social Tariff - Panel

The following questions help Northumbrian Water to ensure that their research is accessible and inclusive for all their customers

How would you describe your ethnic background?

*Please choose one answer only \**

- White British
- White Other
- Mixed
- Asian
- Black
- Chinese
- Other
- Prefer not to say

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

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

Do you or anyone in your household have any learning difficulties (e.g., dyslexia)?

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

Is English your first language?

*Please choose one answer only \**

- Yes
- No
- Prefer not to say

[Back](#) [Next](#)

13%



## Northumbrian Water Social Tariff - Panel

We are interested to know how easy you found all the information and questions in this survey. Please indicate this below.

*Please choose one answer only\**

- Very easy to understand
- Quite easy to understand
- Quite difficult to understand
- Very difficult to understand
- Don't know

Do you have any questions on what you have read today that you would like further clarification on?

*Please provide as much information on this in the box below.*

Back

Submit

96%



## Northumbrian Water Social Tariff - Panel

You've now reached the end of the survey - thank you very much for your time.

You can view more information on the extra support that [Northumbrian Water](#) provide here:

<https://www.nwl.co.uk/services/extra-support/>



## Appendix 2 – online survey – ESW



### Essex & Suffolk Water Social Tariff - Panel

We just need to check that you are eligible to take part in our survey.

Please click 'Next' to continue with the survey.

Back Next

4%



### Essex & Suffolk Water Social Tariff - Panel

#### Introduction

Thank you for clicking through to complete this survey.

This survey is being carried out by Explain Market Research on behalf of Essex and Suffolk Water. It is very important to Essex & Suffolk Water that the views of their customers are taken into account as they shape their business plan.

Essex & Suffolk Water is a water company serving 1.8 million customers in the Essex and Suffolk regions of England. They would like to understand your views about a proposed scheme to help more people who are genuinely struggling to afford their water bills.

If you have any questions about the research, please contact Thomas at Explain Research via email at [thomas.waldron@explainresearch.co.uk](mailto:thomas.waldron@explainresearch.co.uk)

*This research is being conducted by Explain Market Research on behalf of Northumbrian Water Group. Further details on how we process your data can be found here: <https://www.explainresearch.co.uk/privacy-policy/>*

Next



### Essex & Suffolk Water Social Tariff - Panel

Are you responsible, or jointly responsible, for paying your household water and wastewater bill?

Please choose one answer only \*

- Yes
- No
- Prefer not to say
- Don't know

Back Next

9%

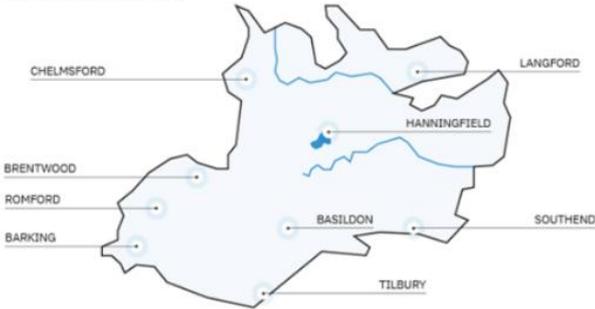


## Essex & Suffolk Water Social Tariff - Panel

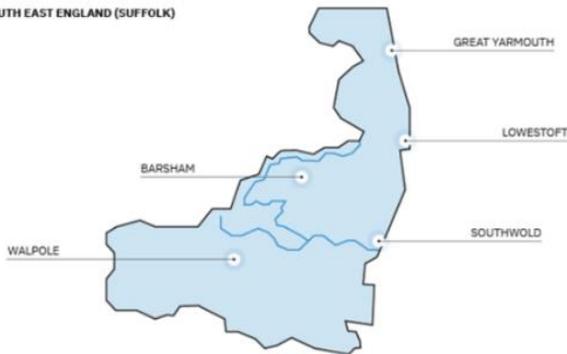
Who provides your water supply? Please refer to this map if you are unsure of the area that Essex & Suffolk Water covers.

Please choose one answer only

### SOUTH EAST ENGLAND (ESSEX)



### SOUTH EAST ENGLAND (SUFFOLK)



- Essex & Suffolk Water
- Anglian Water
- Thames Water
- Other (please write in)
- Don't know
- Prefer not to say

Back Next

13%



## Essex & Suffolk Water Social Tariff - Panel

We'd now like to find out a little more about you.

The following questions help Essex & Suffolk Water to understand how the views of different customers are different from each other.

Please click 'Next' to continue with the survey.

[Back](#) [Next](#)





## Essex & Suffolk Water Social Tariff - Panel

Which of the following describes how you think of yourself?

Please choose one answer only \*

- Male
- Female
- In another way (please tell us more about this)
- Prefer not to say

Which of the following age groups do you fall into?

Please choose one answer only \*

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to say

Which of the following best describes the main income earner's occupation in your household? (If the main income earner is now retired, please select the category that best reflects their occupation before they retired.)

Please choose one answer only \*

- Higher managerial, administrative or professional
- Intermediate managerial, administrative or professional
- Supervisory or clerical and junior managerial, administrative or professional
- Skilled manual worker
- Semi or unskilled manual worker
- Casual worker, or dependant on state welfare
- Don't know
- Prefer not to say

Back

Next

22%



## Essex & Suffolk Water Social Tariff - Panel

Are you aware that Essex & Suffolk Water give support to customers who are financially vulnerable? (i.e. on a low income, or in financial difficulties and struggling to afford their water bill).

*Please choose one answer only \**

- Yes
- No
- Don't know

---

Essex & Suffolk Water has a discounted rate to help customers in financial difficulties. How much do you know about this?

*Please choose one answer only \**

- I know a lot
- I know quite a lot
- I know a little bit
- I do not know anything about it

Back

Next

26%





## Essex & Suffolk Water Social Tariff - Panel

Essex & Suffolk Water offer a discounted rate to help its most disadvantaged households by reducing their water bills:

Essex & Suffolk Water customers that do not live in outer London boroughs qualify for the social tariff if their household income is under £17,005, and their annual water and wastewater bills are more than 3% of their household income (after rent or mortgage payments).

Essex & Suffolk Water customers that do live in outer London boroughs qualify for the social tariff if their household income is under £21,759, and their annual water and wastewater bills are more than 3% of their household income (after rent or mortgage payments).

Customers also qualify for the social tariff if someone in the household receives Pension Credit and the annual Essex & Suffolk Water bill is 3% or more of their household income (after rent or mortgage payments).

Pension credit is a benefit that tops up weekly income from a person's pension and other earned income to £182.60 for pensioners living on their own and £278.70 if living with a partner.

If you believe you may qualify for this discounted rate, more information can be found at [Financial support \(nwl.co.uk\)](https://www.nwl.co.uk)

Back

Next



## Essex & Suffolk Water Social Tariff - Panel

These low-income customers receive between a 10% and 50% discount on their bill.

The discounted rate is funded by adding a small amount to the bills of all customers. This is known as a cross-subsidy.

Essex & Suffolk Water does not financially profit at all from this rate and 100% of the contributions are passed directly on to help customers in financial difficulty.

Feedback from Essex & Suffolk Water customers so far is that they accept paying 25p per month (£3 per year) on top of their bills in order to provide a discounted rate for low income customers.

All water and wastewater companies have schemes of this type.

The discounts have become even more important as a result of the Cost of Living Crisis.

Essex & Suffolk Water also have a customer debt assistance scheme, funded by Essex & Suffolk Water, which customer debt payments to clear water arrears.

Back

Next



## Essex & Suffolk Water Social Tariff - Panel

Currently Essex & Suffolk Water is helping 35,000 customers each year with this discounted rate but they would like to be able to help more.

Taking account of the current Cost of Living Crisis, Essex & Suffolk Water believe that over 150,000 low income customers may be in need of financial support and would qualify for the discounted rate, and it would like to help all of these additional customers by 2025.

You will now be asked some questions about your willingness to support or oppose the discounted rate through your Essex & Suffolk Water bill in 2023-2025 and beyond.

The costs mentioned EXCLUDE inflation and they represent the ADDITION to your bill to help the additional 150,000 households.

[Back](#) [Next](#)





## Essex & Suffolk Water Social Tariff - Panel

The discounted rate forms part of a range of support that Essex & Suffolk Water provide to help customers who struggle to pay their water and wastewater bill. Others are:

# How Essex & Suffolk Water already helps customers with their bills

### Low Income Discount (Social Tariff)

Customers on a low income can apply for a bill reduction of up to 50%.

### Payment break

Customers can apply for a short payment break in unexpected circumstances.

### Reduced bill scheme

Funded by Essex & Suffolk Water which can offer up to a 50% discount for customers who cannot afford their essential household bills (verified by an independent advice provider)

### WaterSure

Essex & Suffolk Water can cap a customer's bill if they receive income-related benefits and have a large family, or if they receive income-related benefits and have a medical condition that uses a lot of water.

### Benefit Checker

Essex & Suffolk Water and Policy in Practice have teamed up to help ensure customers know what benefits they are entitled to and how to redeem them.

### Debt support

Essex & Suffolk Water can put customers in touch with StepChange, a debt charity, who can provide advice on debt.



## Essex & Suffolk Water Social Tariff - Panel

How far do you support or oppose a discounted rate which would help all 87,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 58p per month (£6.96 per year) to helping these low income customers.

Please choose one answer only

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Essex & Suffolk Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 79,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 50p per month (£6 per year) towards helping these low income customers.

Please choose one answer only

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Essex & Suffolk Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 72,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 42p per month (£5.04 per year) towards helping these low income customers.

Please choose one answer only

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Essex & Suffolk Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 64,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 33p per month (£3.96 per year) towards helping these low income customers.

*Please choose one answer only*

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Essex & Suffolk Water Social Tariff - Panel

How far would you support or oppose a discounted rate which would help 57,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 25p per month (£3 per year) towards helping these low income customers.

*Please choose one answer only*

\*

- Strongly support
- Somewhat support
- I don't mind either way
- Somewhat oppose
- Strongly oppose
- Don't know



## Essex & Suffolk Water Social Tariff - Panel

Which of the following do you think are the most effective ways for Essex & Suffolk Water to communicate its discounted rate to customers that might eligible?

Please choose one answer only \*

- Posters/leaflets in doctors surgeries, dentists and hospitals
- Emails
- Leafleting directly to homes
- Website and social media
- Working with charities and debt advice agencies
- Face to face (e.g. stalls in shopping centres, door knocking)
- Messages on the Essex & Suffolk Water inbound telephone line
- Included within bill statements
- Other (please specify)



## Essex & Suffolk Water Social Tariff - Panel

Thank you for answering the previous questions, the following questions here to further aid Essex & Suffolk Water in understanding how different groups feel about the proposed changes. As some of these questions are sensitive, the ability to prefer not to say is present.

Please click next to continue with the survey.

[Back](#) [Next](#)

74%





## Essex & Suffolk Water Social Tariff - Panel

### And finally

Which of the following statements best describes how easy or difficult you find it to pay your water and wastewater bill each month?

*Please choose one answer only \**

- I do not have any problems paying my bill
- I rarely find it difficult to pay my bill
- I sometimes find it difficult to pay my bill
- I frequently find it difficult to pay my bill
- I always find it difficult to pay my bill

Do you have a water meter?

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

Do you pay Essex & Suffolk Water directly for your water and wastewater?

*Please choose one answer only \**

- Yes
- No – I pay through my rent

Back

Next

78% 



## Essex & Suffolk Water Social Tariff - Panel

Which of the following income bands does your household fit into? Please include the income of everyone in the household (before tax and national insurance is deducted) and include any pensions, benefits, or extra earnings.

*Please choose one answer only \**

- Less than £8,500
- £8,500 to £12,999
- £13,000 to £16,499
- £16,500 to £29,999
- £30,000 to £39,999
- £40,000 to £49,999
- £50,000 to £74,999
- £75,000 to £99,999
- £100,000 or more
- Don't know
- Prefer not to say

Which of the following best describes your financial position?

*Please choose one answer only \**

- I never struggle to pay my household bills.
- I sometimes struggle to pay my household bills but I usually manage to keep on top of it.
- I struggle to pay my household bills and I am often behind in my payments.
- I always struggle to pay my household bills and I am often behind in my payments.
- Don't know
- Prefer not to say

Which of the following best describes your current working status?

*Please choose one answer only \**

- Work full time (30 hours or more per week)
- Work part time (under 30 hours per week)
- Self-employed
- Full time education
- Unemployed / looking for work
- Long term sick / disabled
- Retired
- Looking after a family
- Other - Write In
- Prefer not to say

Back

Next

83%



## Essex & Suffolk Water Social Tariff - Panel

Does anyone in your household currently receive any benefits or tax credits?

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

How many people are in your household, including yourself?

*Please choose one answer only \**

- 1
- 2
- 3
- 4
- 5
- 6-7
- 8-9
- 10 or more
- Prefer not to say

Back

Next

87% 



## Essex & Suffolk Water Social Tariff - Panel

The following questions help Essex & Suffolk Water to ensure that their research is accessible and inclusive for all their customers

How would you describe your ethnic background?

*Please choose one answer only \**

- White British
- White Other
- Mixed
- Asian
- Black
- Chinese
- Other
- Prefer not to say

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

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

Do you or anyone in your household have any learning difficulties (e.g., dyslexia)?

*Please choose one answer only \**

- Yes
- No
- Don't know
- Prefer not to say

Is English your first language?

*Please choose one answer only \**

- Yes
- No
- Prefer not to say

Back

Next

91%



## Essex & Suffolk Water Social Tariff - Panel

We are interested to know how easy you found all the information and questions in this survey. Please indicate this below.

Please choose one answer only \*

- Very easy to understand
- Quite easy to understand
- Quite difficult to understand
- Very difficult to understand
- Don't know

Do you have any questions on what you have read today that you would like further clarification on?

Please provide as much information on this in the box below.

Back

Submit

96%



## Essex & Suffolk Water Social Tariff - Panel

You've now reached the end of the survey - thank you very much for your time.

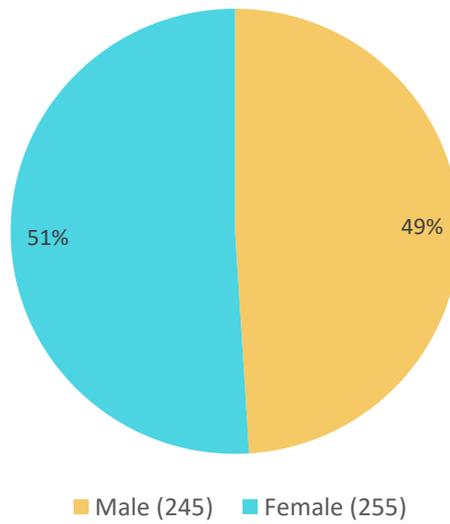
You can view more information on the extra support that [Essex & Suffolk Water](#) provide here:

<https://www.nwl.co.uk/services/extra-support/>

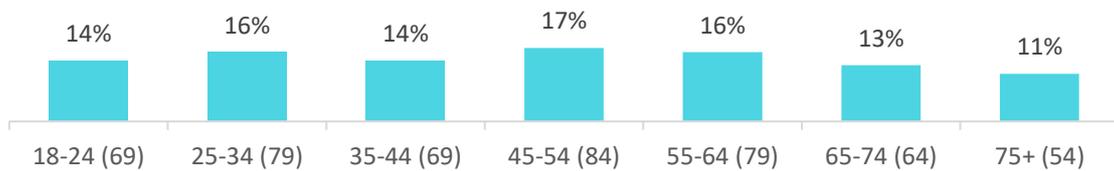
100%

## Appendix 3 – Respondent profile (Northumbrian Water)

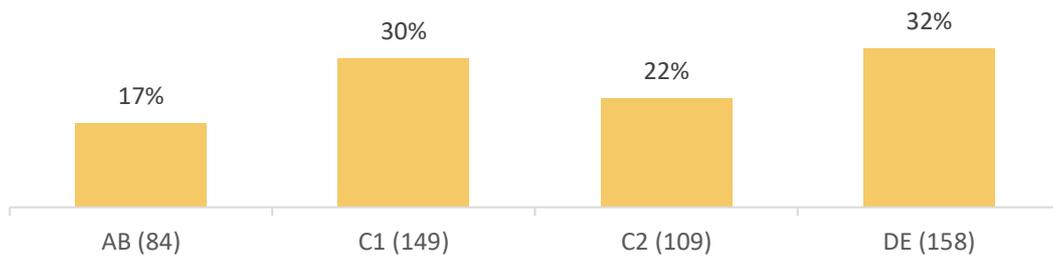
Gender - Northumbrian Water (500)



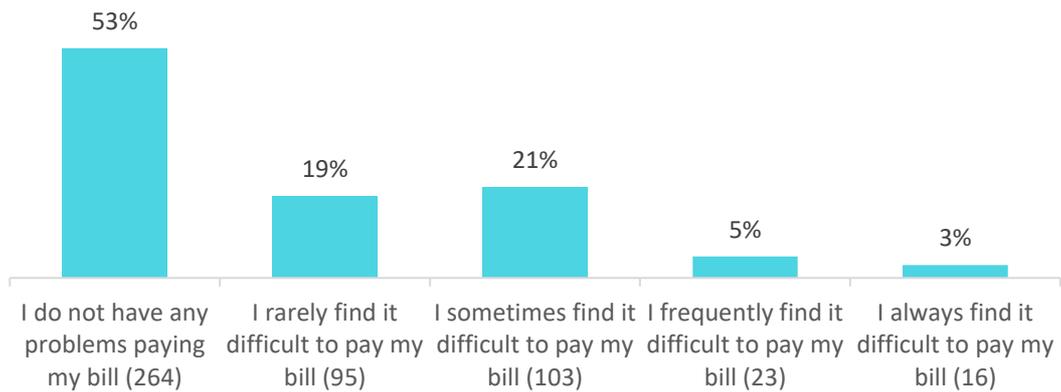
Age - Northumbrian Water (500)



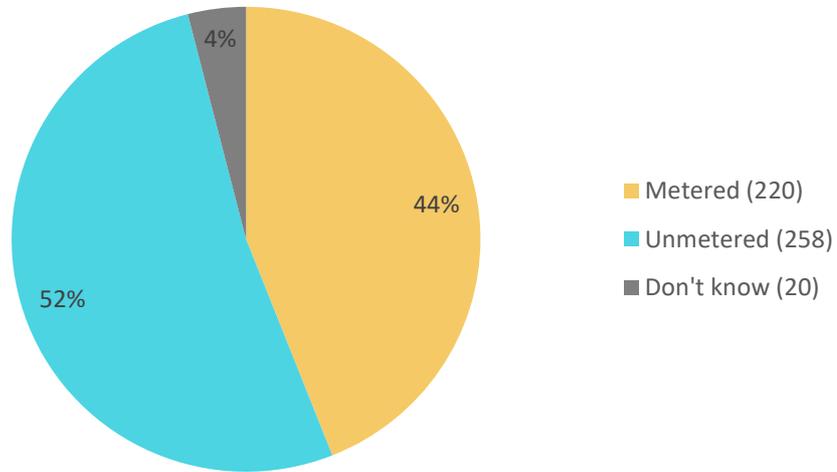
### SEG - Northumbrian Water (500)



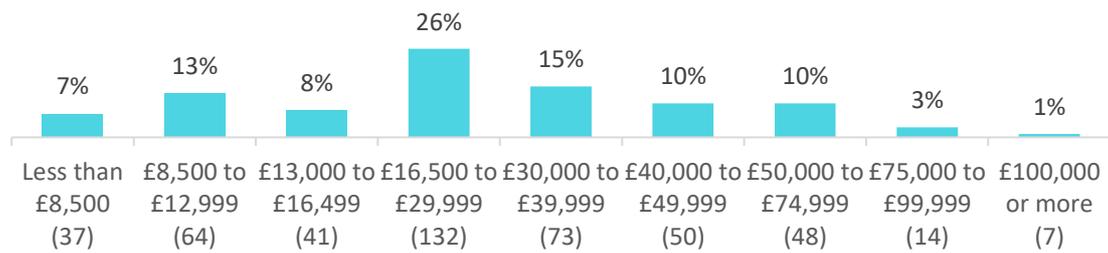
### Financial difficulties - Northumbrian Water (500)



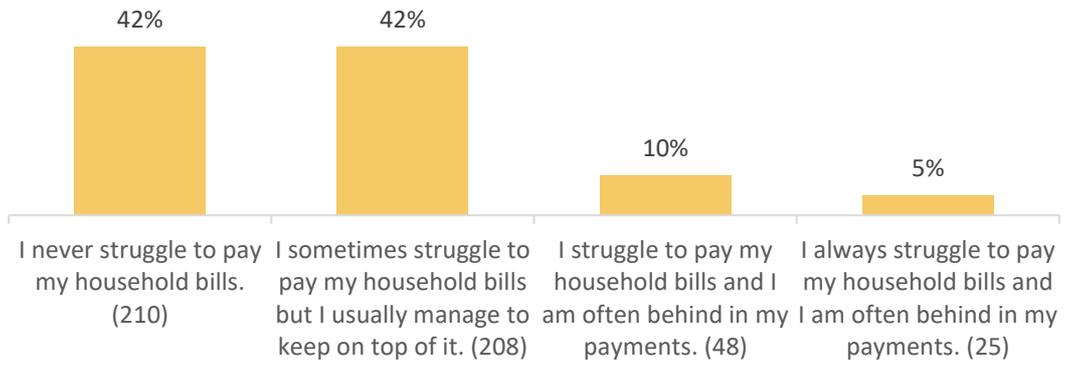
### Meter status - Northumbrian Water (500)



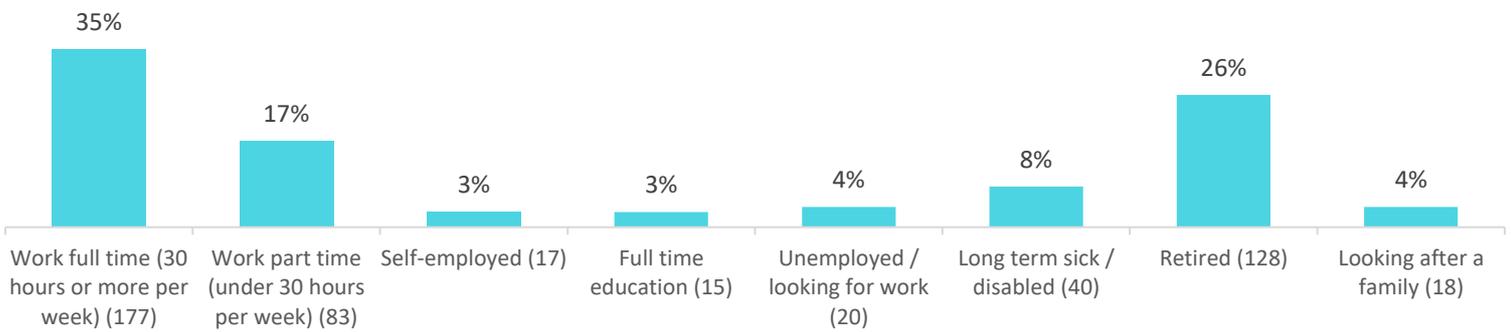
### Household income - Northumbrian Water (500)



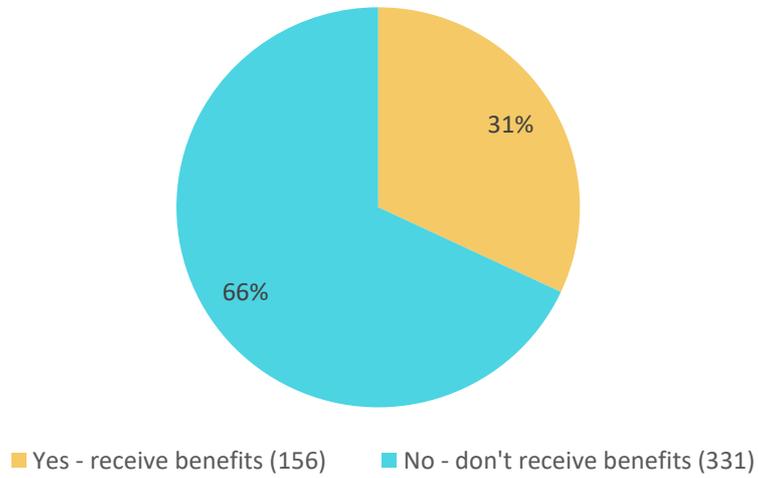
### Finances - Northumbrian Water (500)



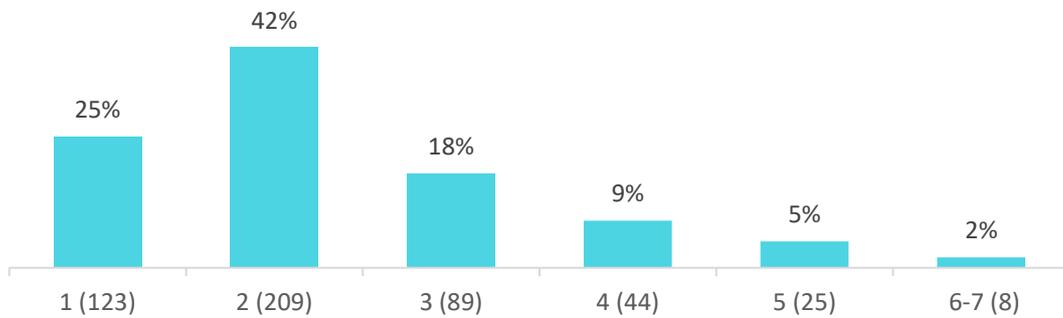
### Working status - Northumbrian Water (500)



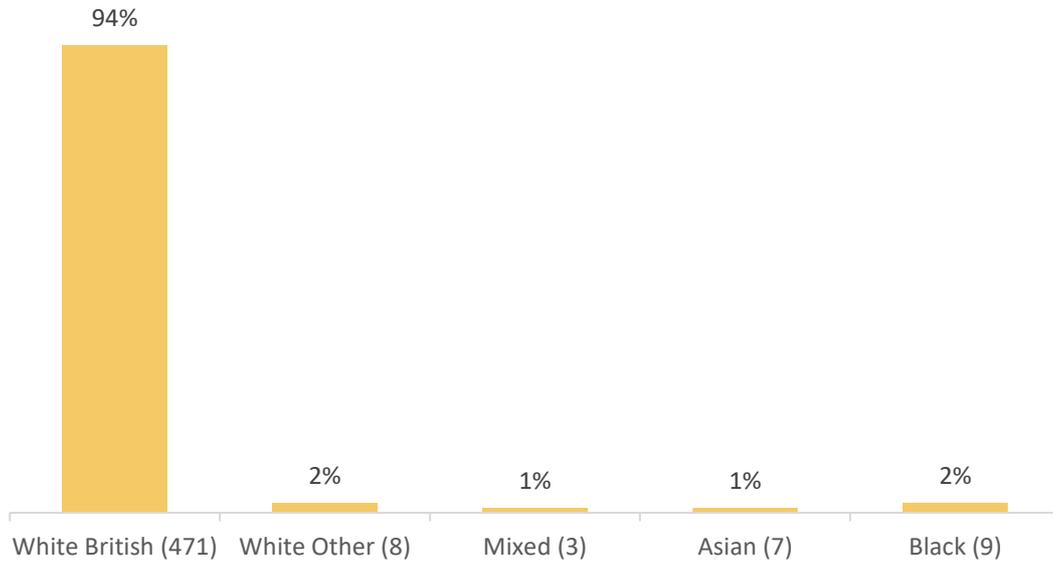
### Benefits - Northumbrian Water (500)



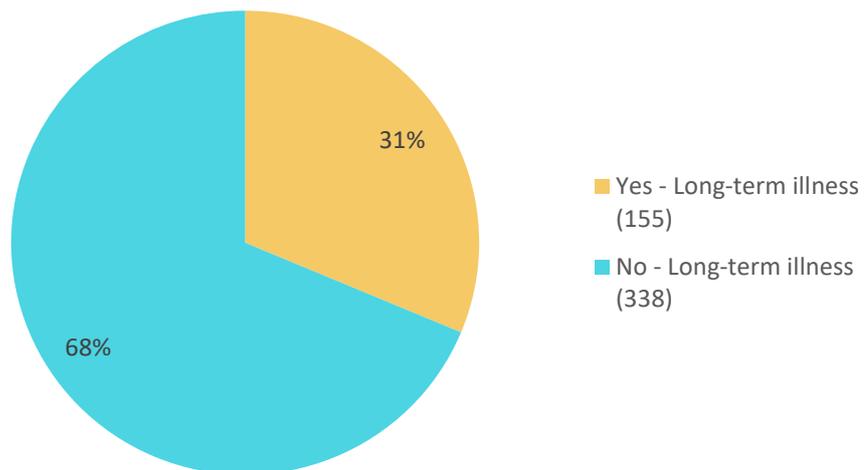
### Household size - Northumbrian Water (500)



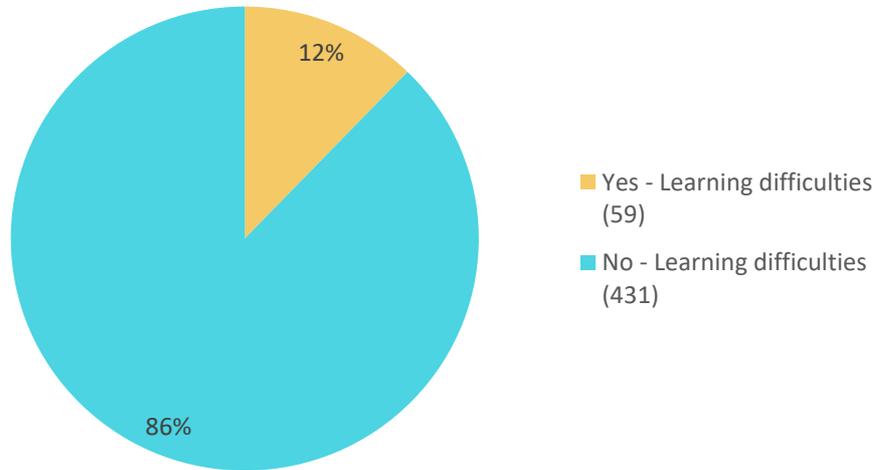
### Ethnicity - Northumbrian Water (500)



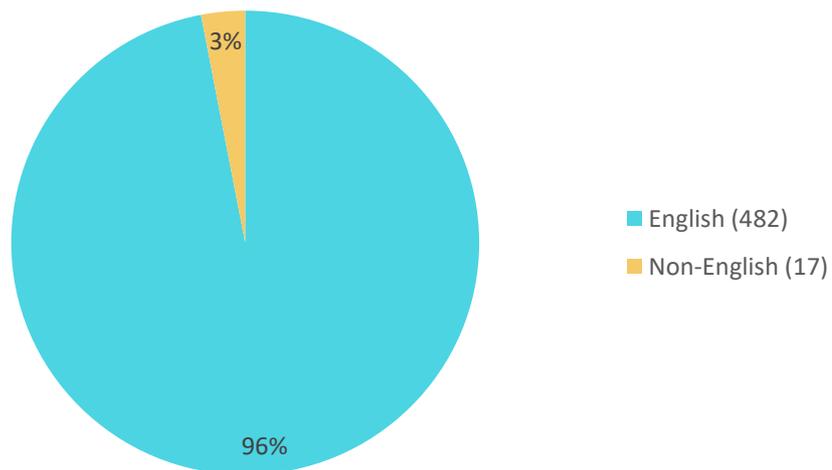
### Long-term illness - Northumbrian Water (500)



### Learning difficulties - Northumbrian Water (500)

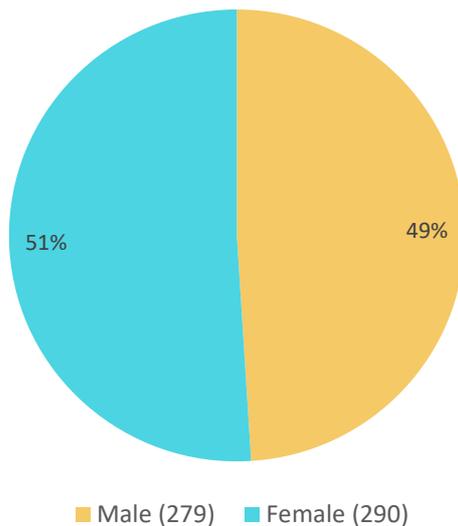


### First language - Northumbrian Water (500)

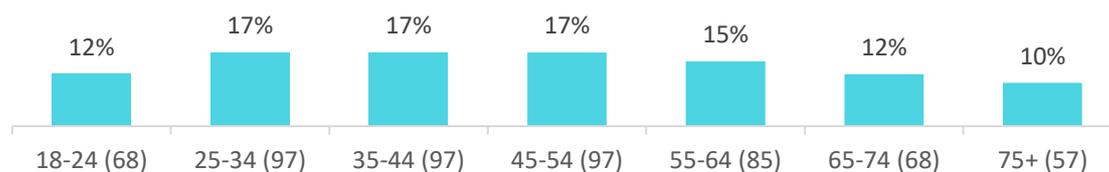


## Appendix 4 – Respondent profile (Essex & Suffolk Water)

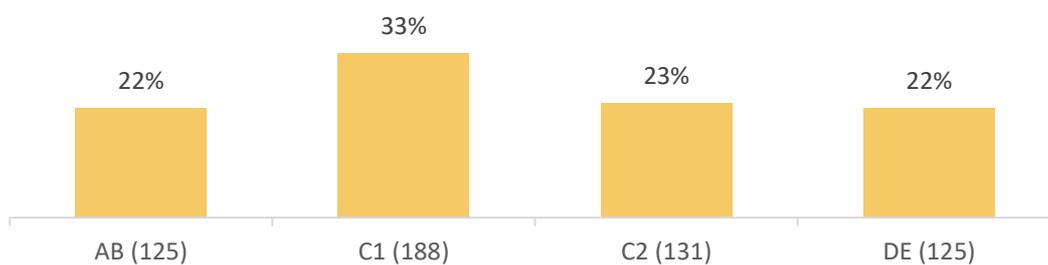
Gender - Essex & Suffolk Water (569)



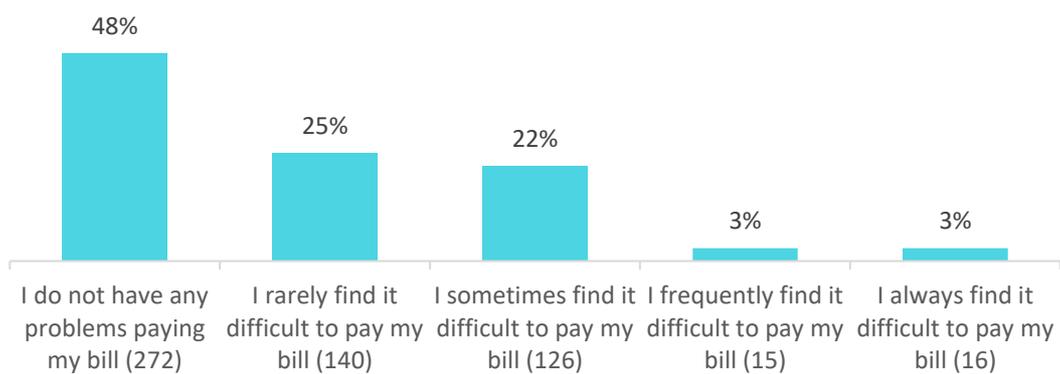
Age - Essex & Suffolk Water (569)



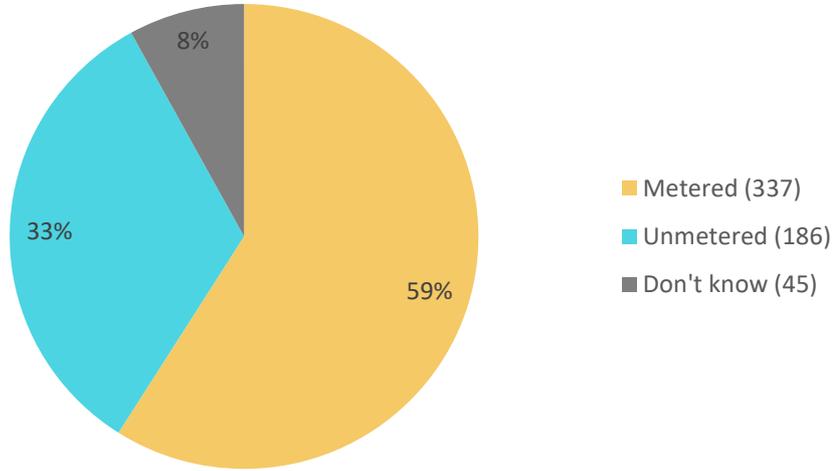
### SEG - Essex & Suffolk Water (569)



### Financial difficulties - Essex & Suffolk Water (569)



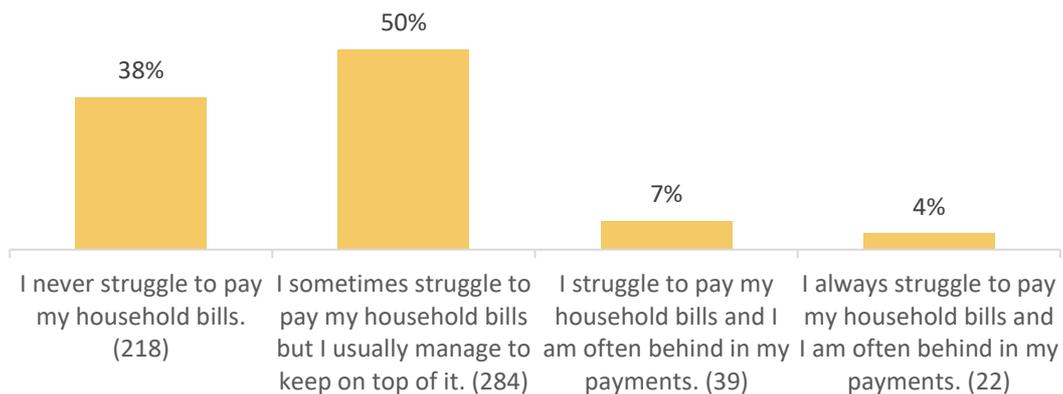
**Meter status - Essex & Suffolk Water (569)**



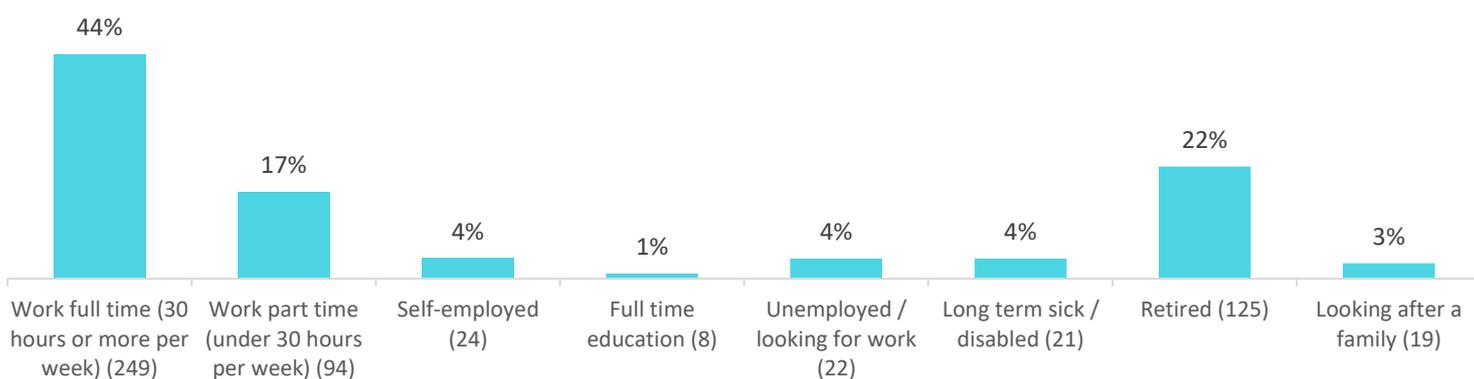
**Household income - Essex & Suffolk Water (569)**



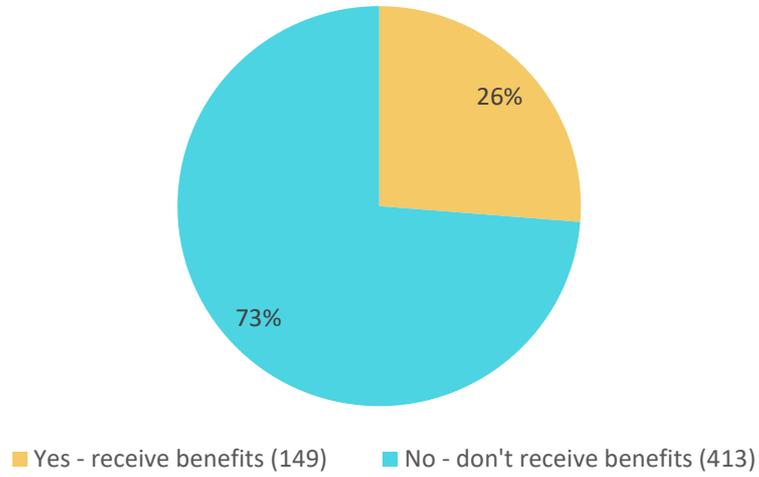
### Finances - Essex & Suffolk Water (569)



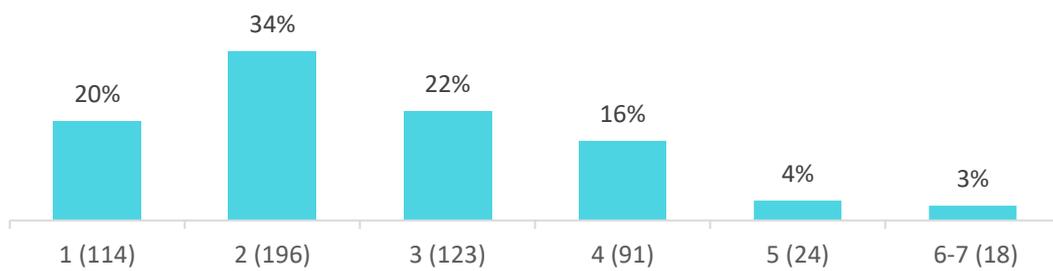
### Working status - Essex & Suffolk Water (569)



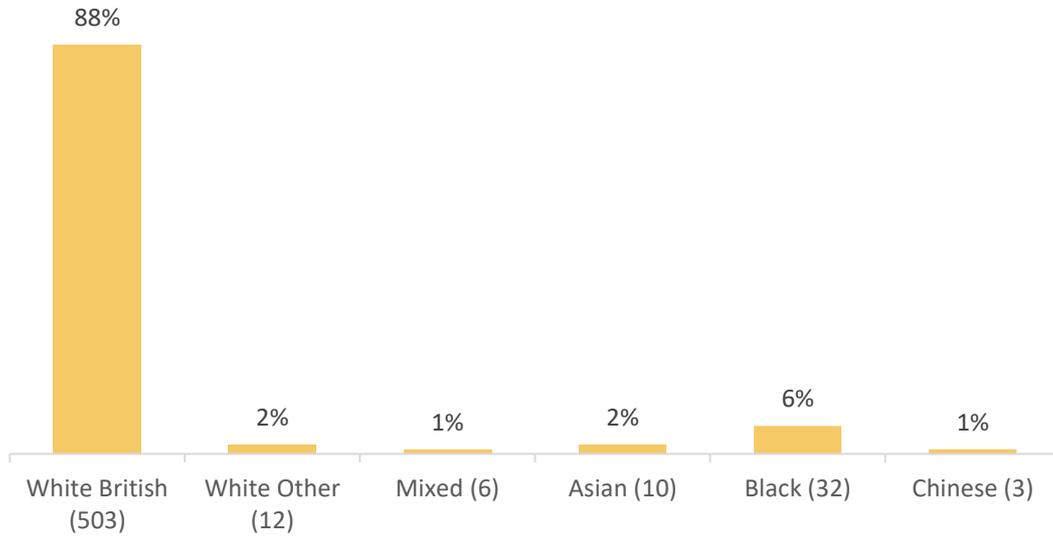
### Benefits - Essex & Suffolk Water (569)



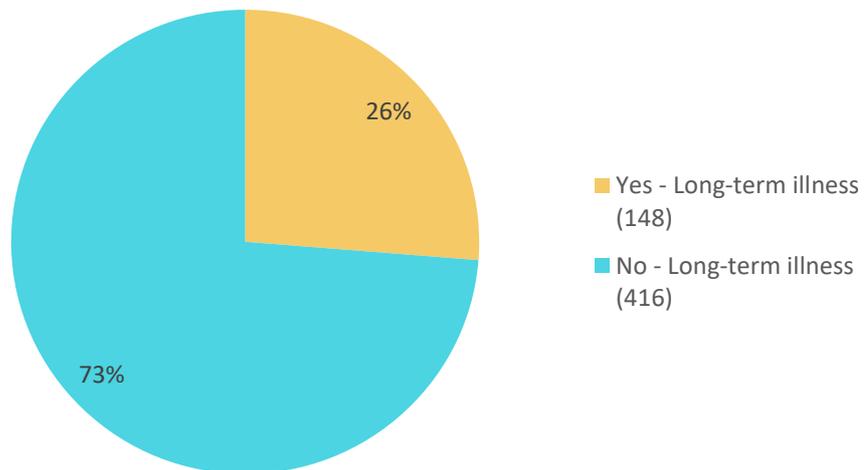
### Household size - Essex & Suffolk Water (569)



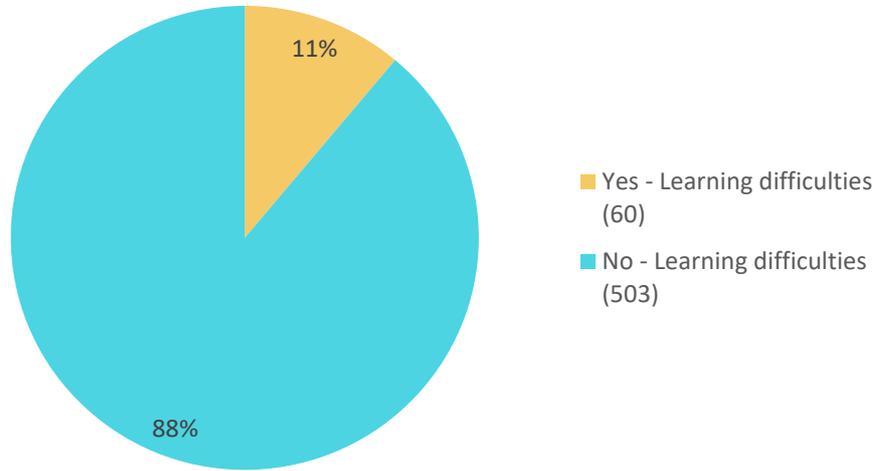
### Ethnicity - Essex & Suffolk Water (569)



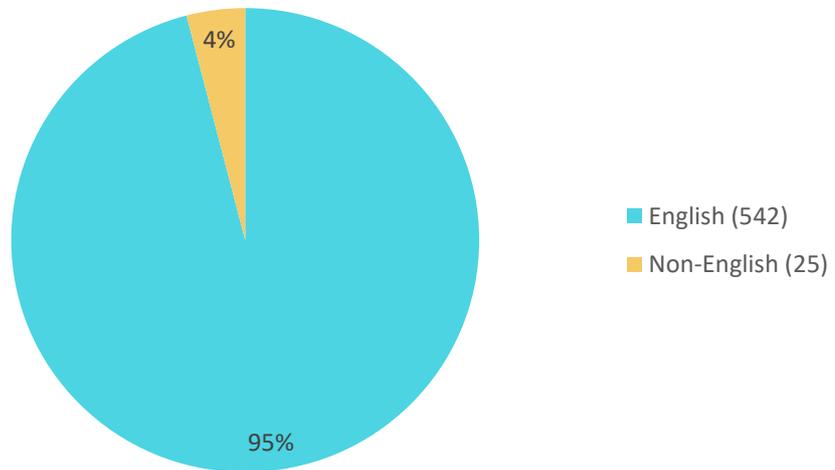
### Long-term illness - Essex & Suffolk Water (569)



**Learning difficulties - Essex & Suffolk Water (569)**



**First language - Essex & Suffolk Water (569)**



## Appendix 5 – Weighted and unweighted respondent profiles

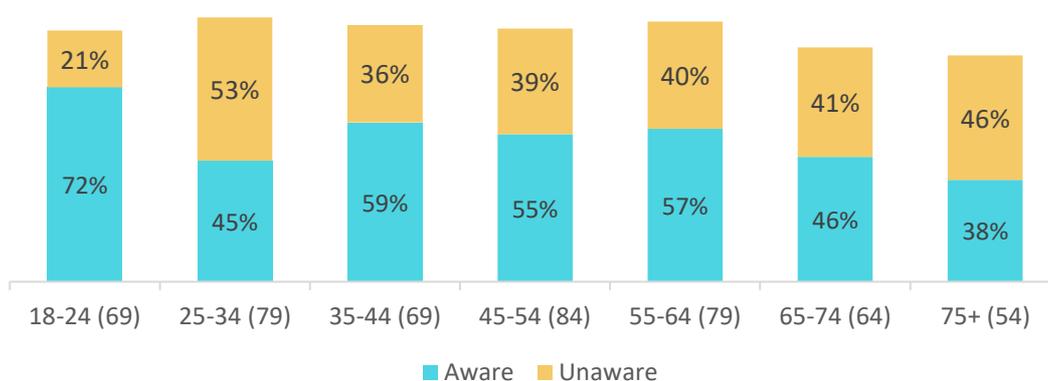
Northumbrian Water				
Subgroup	Weighted figure	Unweighted figure	Weighted %	Unweighted %
<b>Age</b>				
18-24	69	33	14%	7%
25-34	79	65	16%	13%
35-44	69	72	14%	14%
45-54	84	92	17%	18%
55-64	79	108	16%	22%
65-74	64	95	13%	19%
75+	54	34	11%	7%
<b>SEG</b>				
AB	84	136	17%	27%
C1	149	136	30%	27%
C2	109	104	22%	21%
DE	158	102	32%	20%
<b>Gender</b>				
Male	245	225	49%	45%
Female	255	274	51%	55%

Essex & Suffolk Water				
Subgroup	Weighted figure	Unweighted figure	Weighted %	Unweighted %
<b>Age</b>				
18-24	68	37	12%	7%
25-34	97	98	17%	17%
35-44	97	91	17%	16%
45-54	97	99	17%	17%
55-64	85	107	15%	19%
65-74	68	103	12%	18%
75+	57	34	10%	6%
<b>SEG</b>				
AB	125	238	22%	42%
C1	188	148	33%	26%
C2	131	89	23%	16%
DE	125	75	22%	13%
<b>Gender</b>				
Male	279	265	49%	47%
Female	290	301	58%	60%

## Appendix 6 – Awareness of the social tariff by key demographics

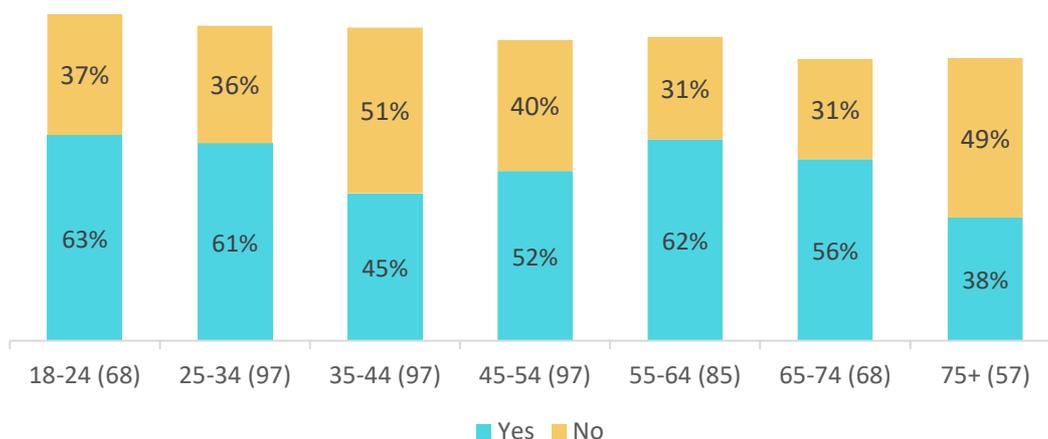
Awareness of the social tariff varied between age groups. Northumbrian Water customers aged 18-29 had the highest levels of awareness, significantly higher than those aged between 25-34 and 45-75. Those aged 75 or older were significantly less likely than the 18-24 and 35-64 age groupings to be aware of the tariff.

**Social tariff awareness by age - Northumbrian Water (500)**



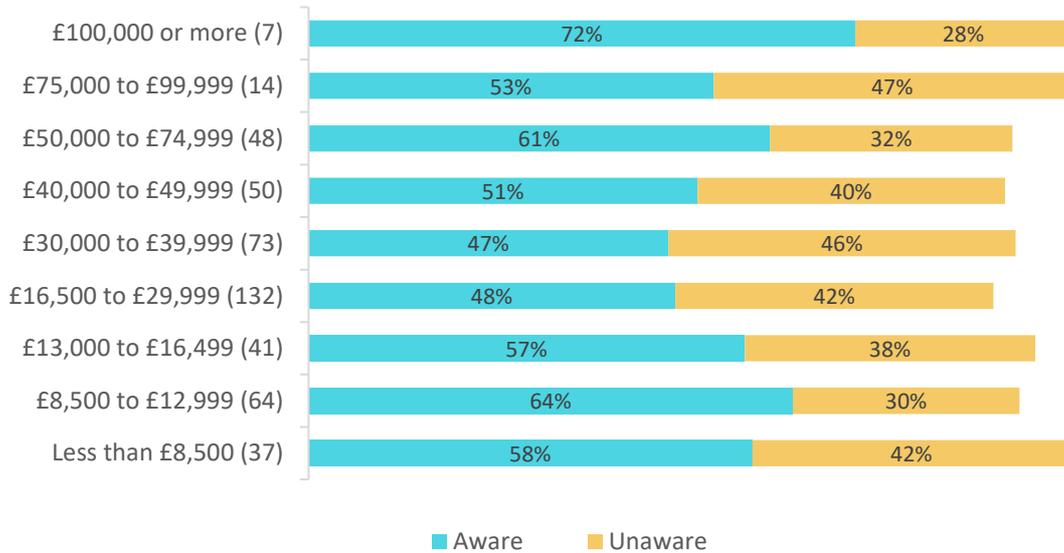
In the Essex & Suffolk region, awareness is less variable than Northumbrian Water, but those aged 18-24 continued to lead in awareness. Similar to Northumbrian Water, those aged 75 or older were significantly less likely than the 18-34 and 55-74 age groupings to be aware of the tariff.

**Social tariff awareness by age - Essex & Suffolk Water (569)**



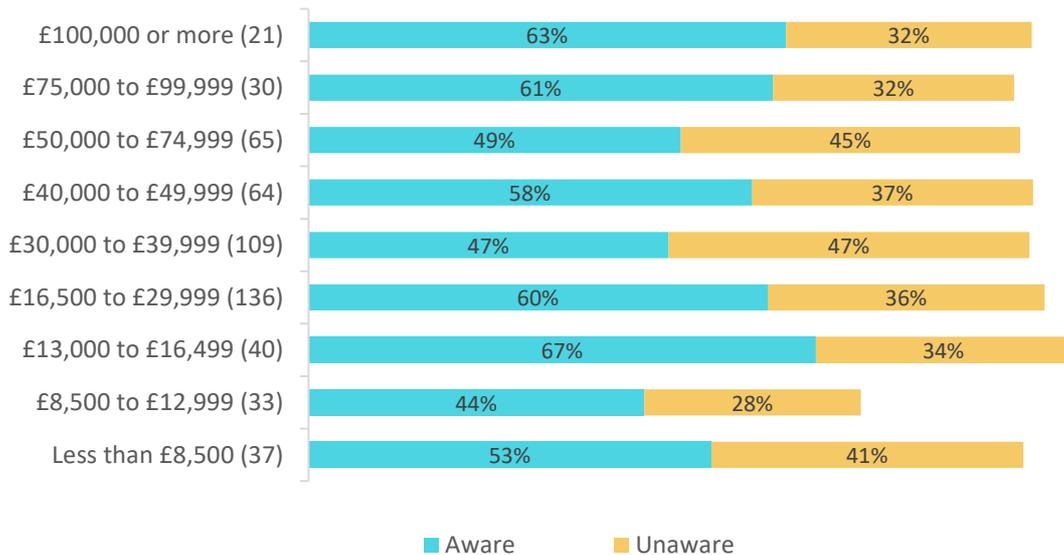
In the Northumbrian Water region, those earning £100,000 or greater were the most likely to be aware of the social tariff. Those earning £8,500 to £12,999 were significantly more likely than income bands £13,000 to £16,499 and £30,000 to £39,999 to be aware of the social tariff.

### Social tariff awareness by income - Northumbrian Water (500)



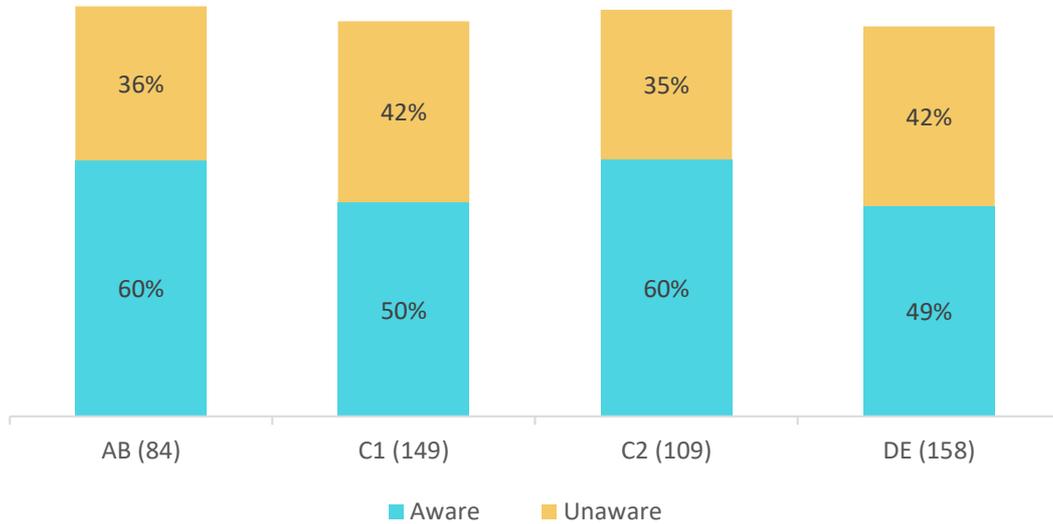
Unlike Northumbrian Water, Essex & Suffolk Water customers earning £13,000 to £16,499 lead in social tariff awareness. This was significantly higher than income groups £8,500 to £12,999 and £30,000 to £39,999. Similarly, customers in income band £16,500 to £29,999 were significantly more likely to be aware than those in income band £30,000 to £39,999.

### Social tariff awareness by income - Essex & Suffolk Water (569)



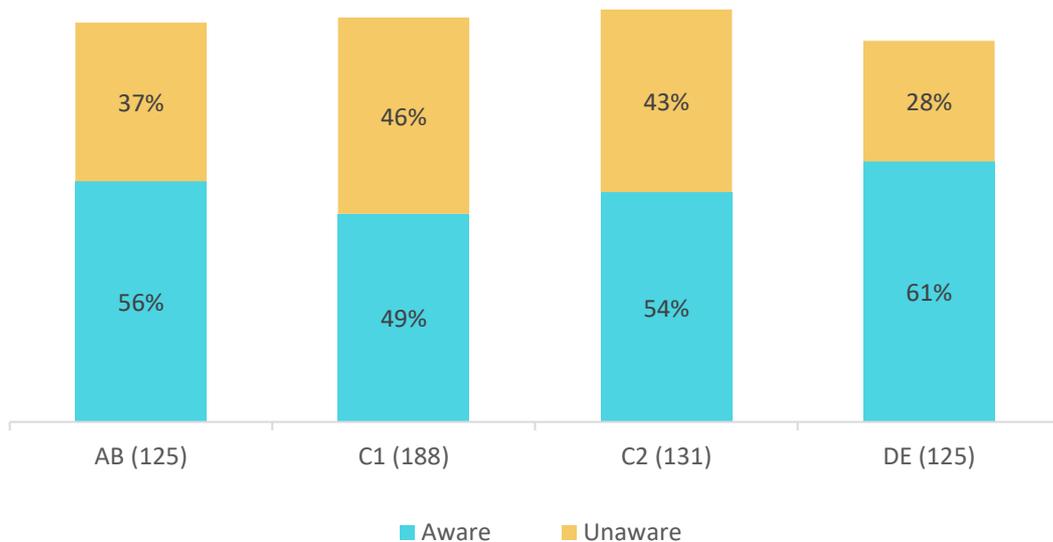
For Northumbrian Water, while SEG AB leads in social tariff awareness, there were no significant differences between SEG groupings.

### Social tariff awareness by SEG - Northumbrian Water (500)



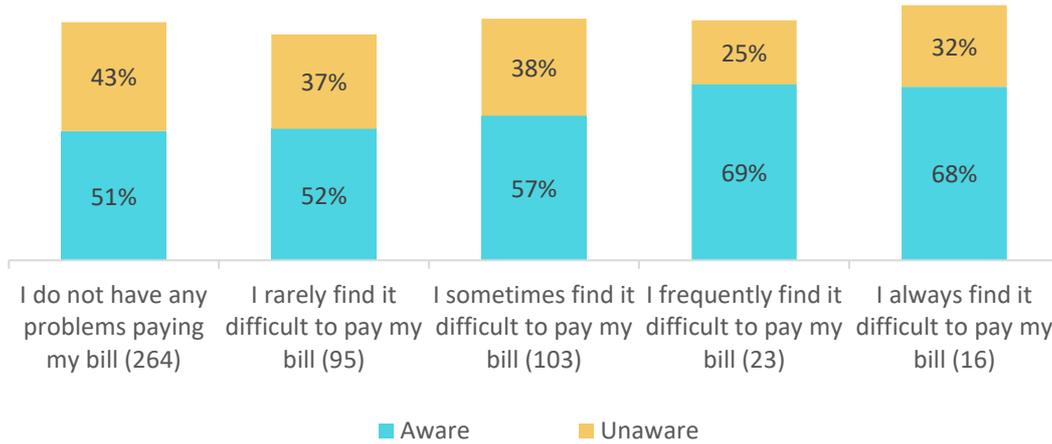
Unlike Northumbrian Water, SEG DE leads in social tariff awareness for Essex & Suffolk Water customers. SEG DE were significantly more likely to be aware than SEG C1.

### Social tariff awareness by SEG - Essex & Suffolk Water (569)



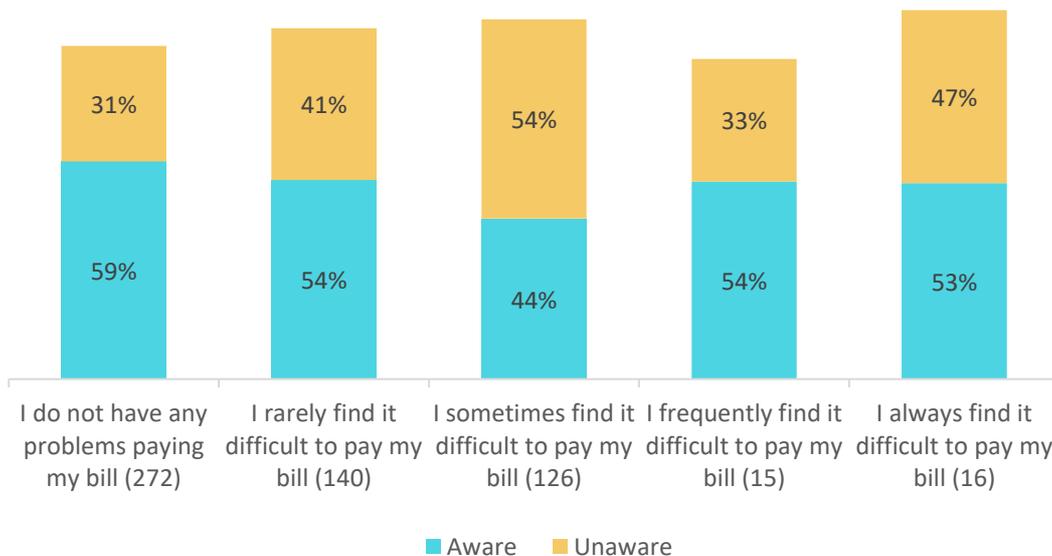
Financial situation did not yield any significant differences in awareness for Northumbrian Water customers, but those frequently finding it difficult to pay their bills returned the highest levels of awareness.

### Social tariff awareness by finances - Northumbrian Water (500)



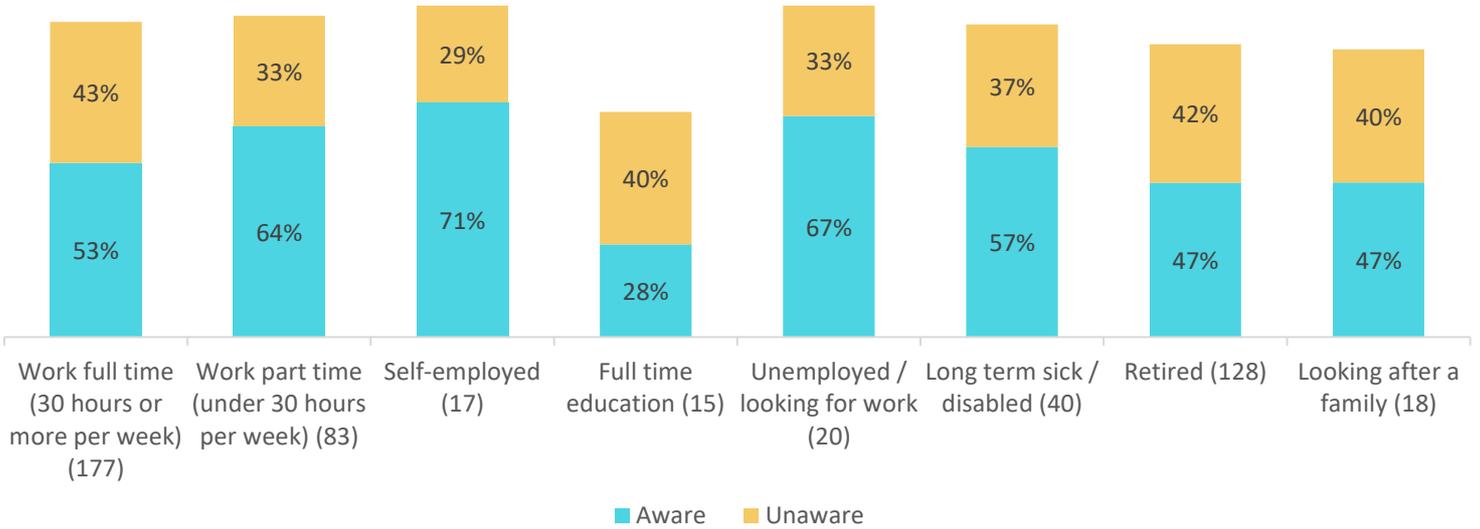
Awareness among Essex & Suffolk Water customers who do not have any problems paying their bills (59%) leads overall and was significantly higher than those who sometimes find it difficult to pay their bills (44%). If the variable 'I sometimes find it difficult to pay my bills..' is taken as a proxy measure for customers who are 'just about managing' financially, this analysis indicates that there is a relationship between customers who are just about managing and awareness of the social tariff.

### Social tariff awareness by finances - Essex & Suffolk Water (569)



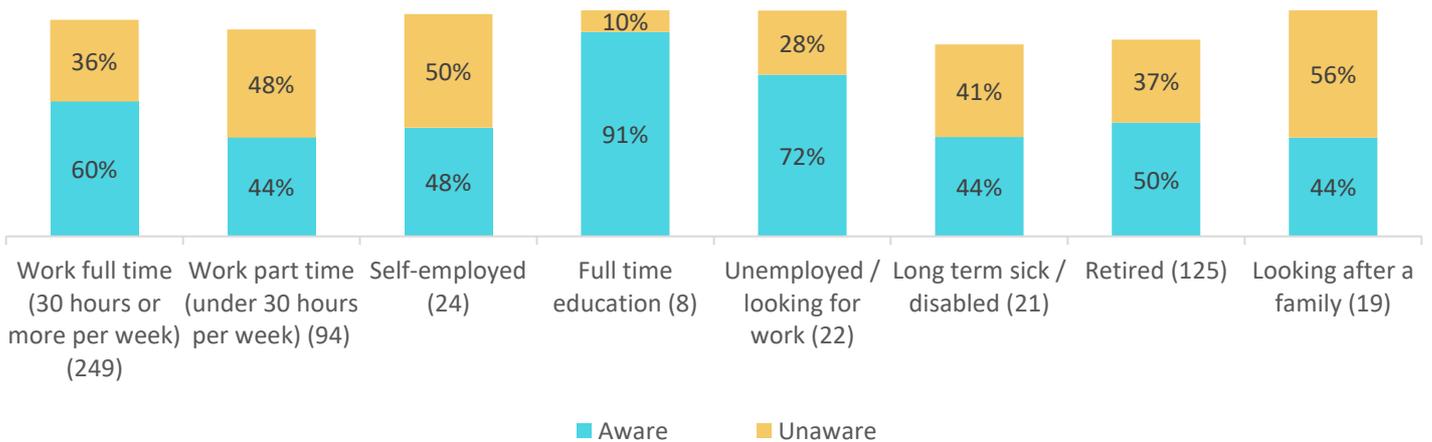
Among Northumbrian Water customers, awareness was highest for those who are self-employed at 71%. Those in full time education were significantly less likely to be aware of the social tariff than those working part time, self-employed and those unemployed.

### Social tariff awareness by employment status - Northumbrian Water (500)



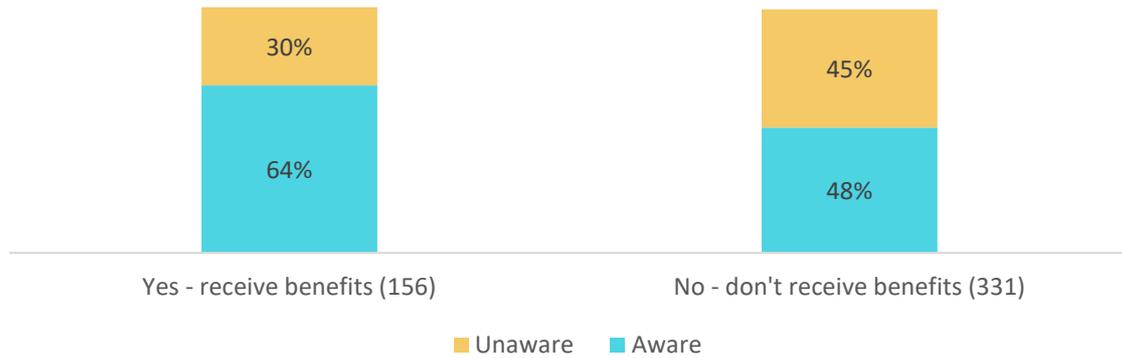
Results differed for Essex & Suffolk Water customers, with awareness being significantly lower among those working part time when compared to those working full time, in full time education and those unemployed.

### Social tariff awareness by employment status - Essex & Suffolk Water (569)



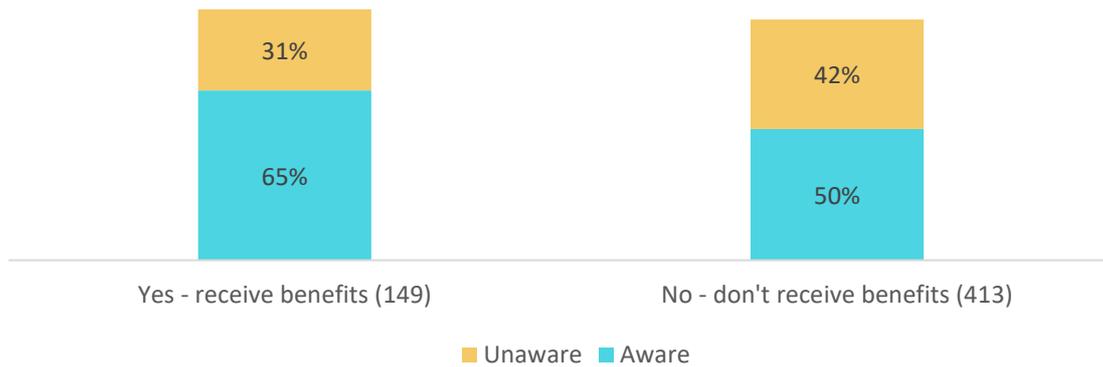
In the Northumbrian Water region, those living with someone who receives benefits were significantly more likely to be aware of the social tariff than those who do not receive benefits.

### Social tariff awareness by benefits - Northumbrian Water (500)



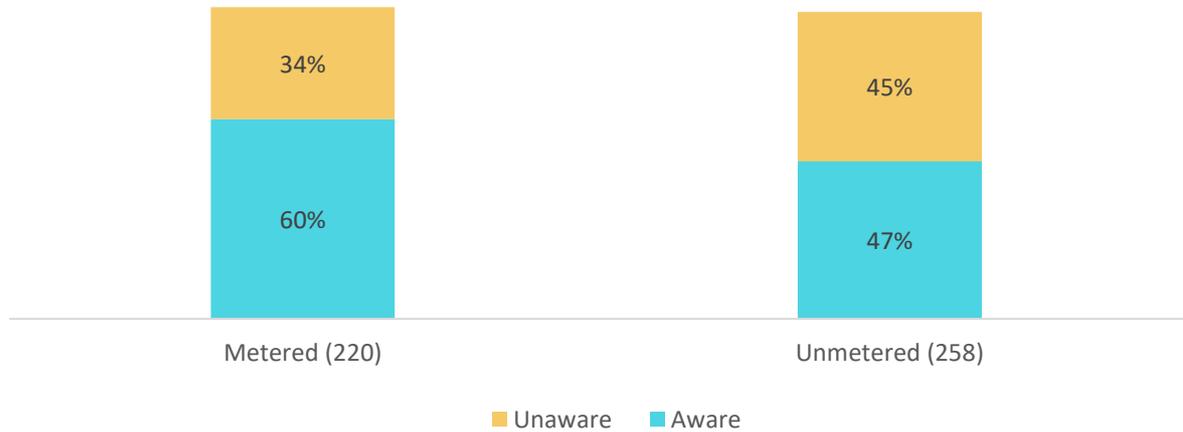
Results for Essex & Suffolk Water were similar, with those living with someone who receives benefits being significantly more likely to be aware of the social tariff than those who do not live with someone who receives benefits.

### Social tariff awareness by benefits - Essex & Suffolk Water (569)



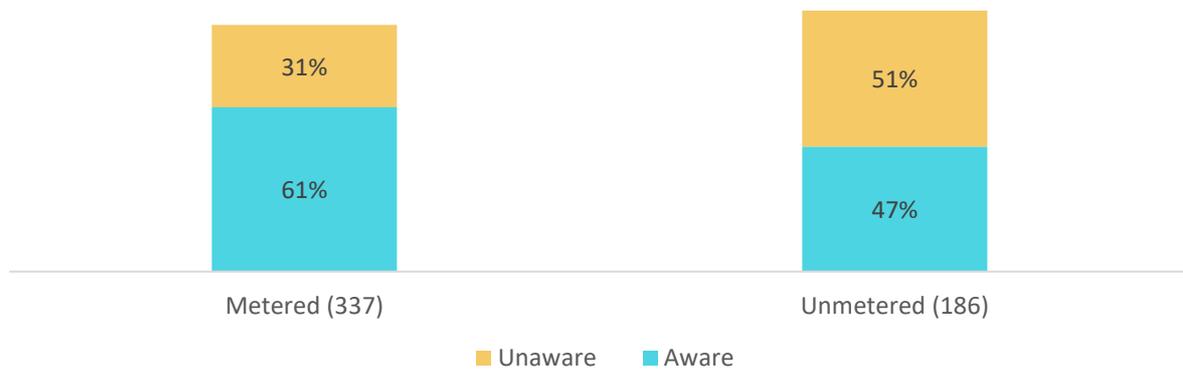
Social tariff awareness was significantly higher among those who have a water meter when compared to those without for Northumbrian Water customers.

### Social tariff awareness by meter status - Northumbrian Water (500)



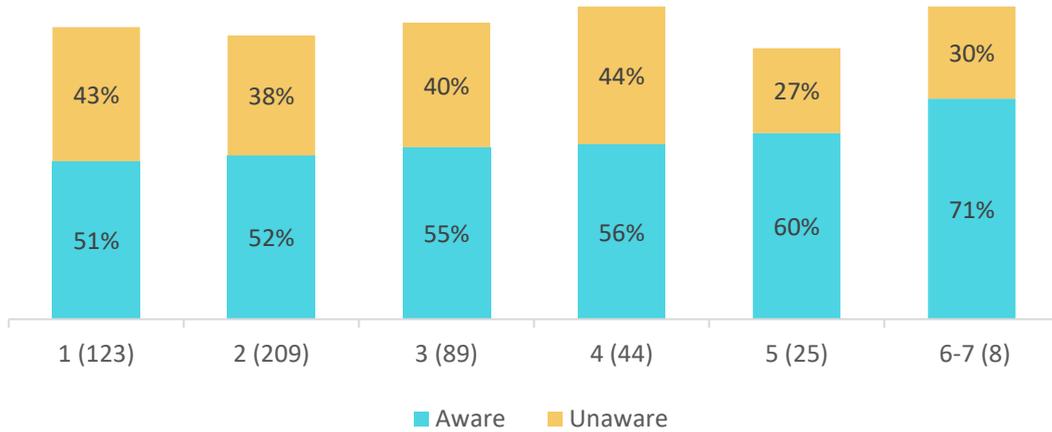
Awareness levels by meter status among Essex & Suffolk Water customers closely resemble those of Northumbrian Water, with those metered significantly more likely to be aware of the social tariff.

### Social tariff awareness by meter status - Essex & Suffolk Water (569)



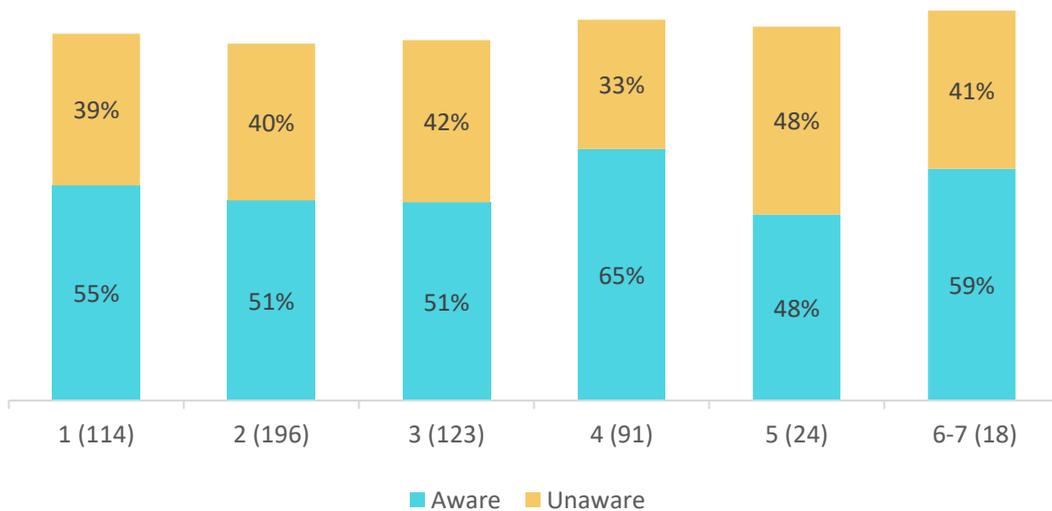
Social tariff awareness in the Northumbrian Water area increases with the increase in household size. However, there are no significant differences between these groupings.

**Social tariff awareness by household size - Northumbrian Water (500)**



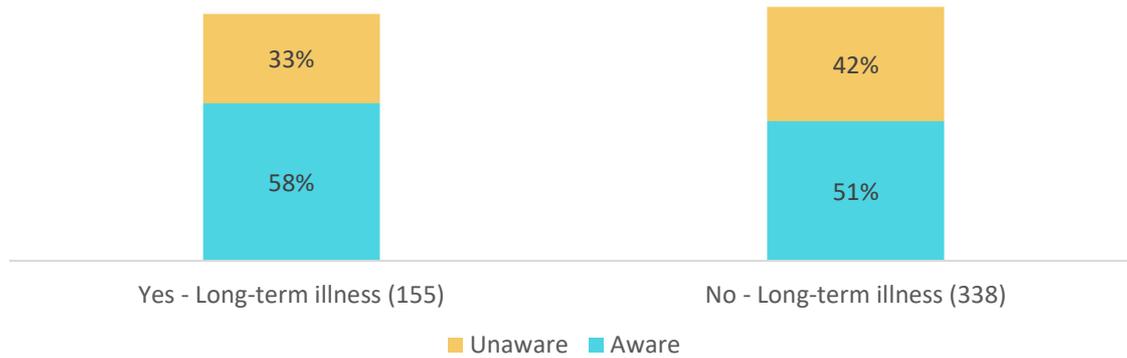
Awareness among Essex & Suffolk Water customers shows a more varied awareness level by household size. Those living in a four-person household were significantly more likely than two-three person households to be aware of the social tariff.

**Social tariff awareness by household size - Essex & Suffolk Water (569)**



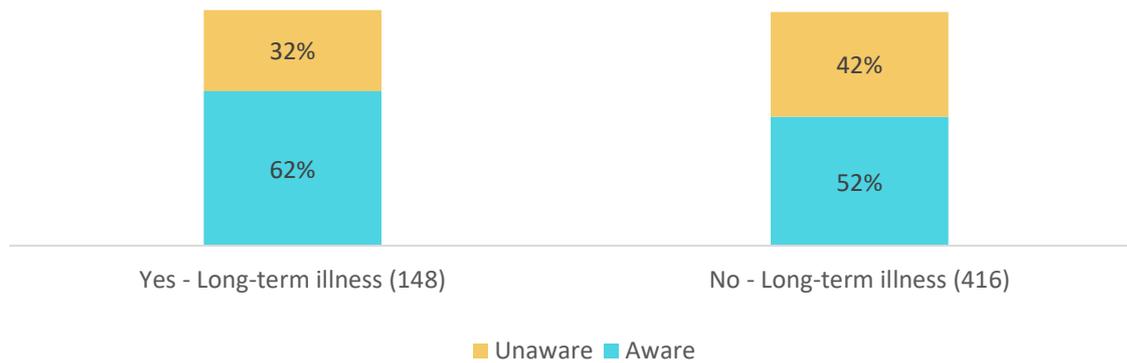
For Northumbrian Water customers, while those living in a household with someone who has a long-term illness were more likely to be aware of the social tariff, this difference is not significant.

### Social tariff awareness by long-term illness - Northumbrian Water (500)



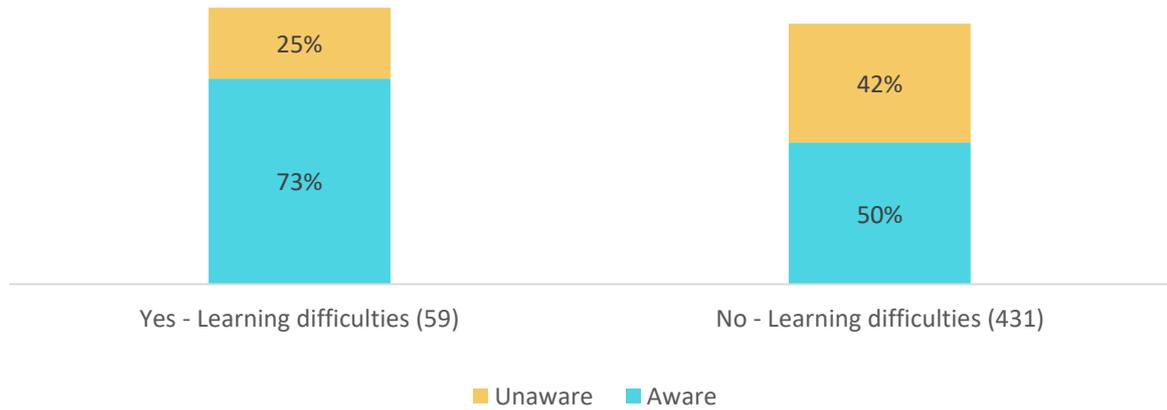
Those living with someone who has a long-term illness were significantly more likely to be aware of the social tariff than those who are not living with someone who has a long-term illness in the Essex & Suffolk Water area.

### Social tariff awareness by long-term illness - Essex & Suffolk Water (569)



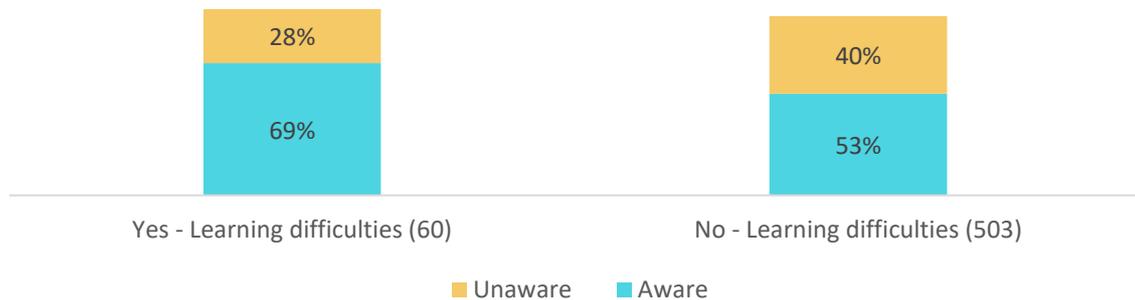
Northumbrian Water customers living in a household with someone who has a learning difficulty were significantly more likely to be aware of the social tariff than those not living in a household with someone who has a learning difficulty.

### Social tariff awareness by learning difficulties - Northumbrian Water (500)



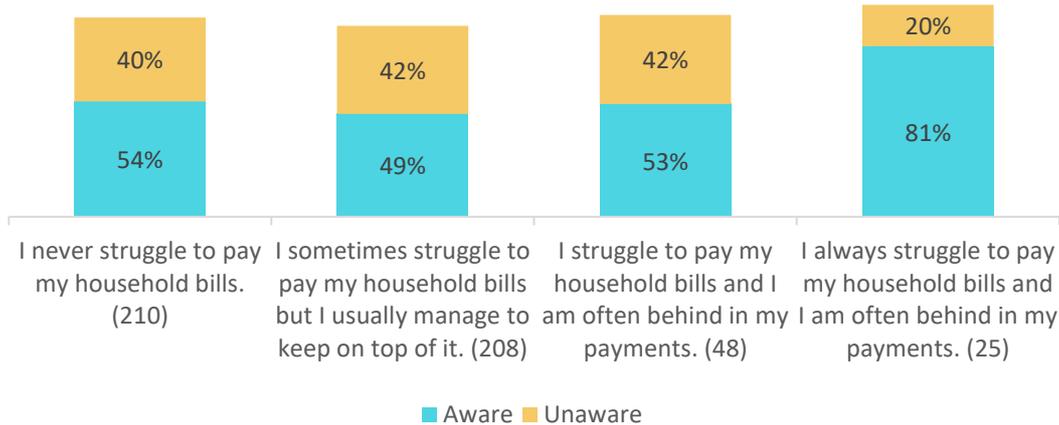
Although social tariff awareness for those living in a household with someone with a learning difficulty is lower when compared to Northumbrian Water, this group were still significantly more likely to be aware of the social tariff than someone who does not live in a household with someone who has learning difficulties.

### Social tariff awareness by learning difficulties - Essex & Suffolk Water (569)



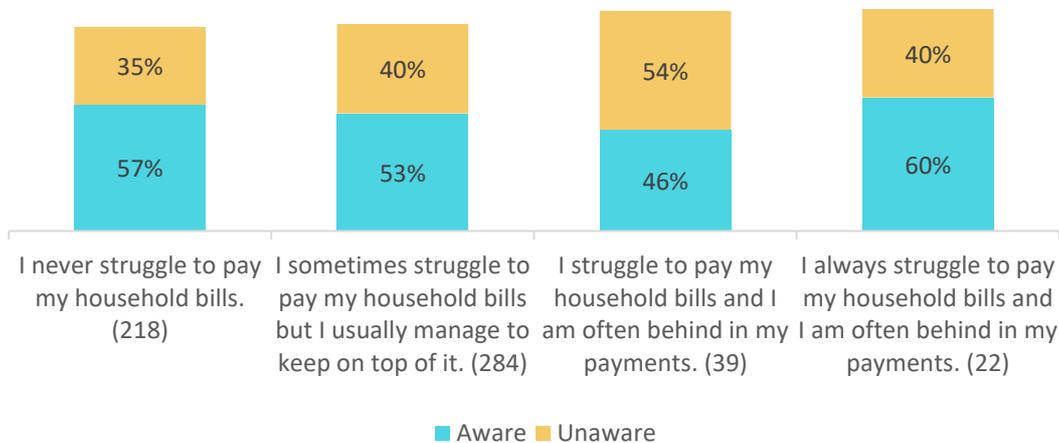
Social tariff awareness among Northumbrian Water customers was significantly higher among those who always struggle to pay their household bills, with significant differences between the other groups. As those who always struggle to pay their household bills generally are more likely to qualify for the social tariff, their higher level of awareness is a positive note.

### Social tariff awareness by financial difficulties - Northumbrian Water (500)



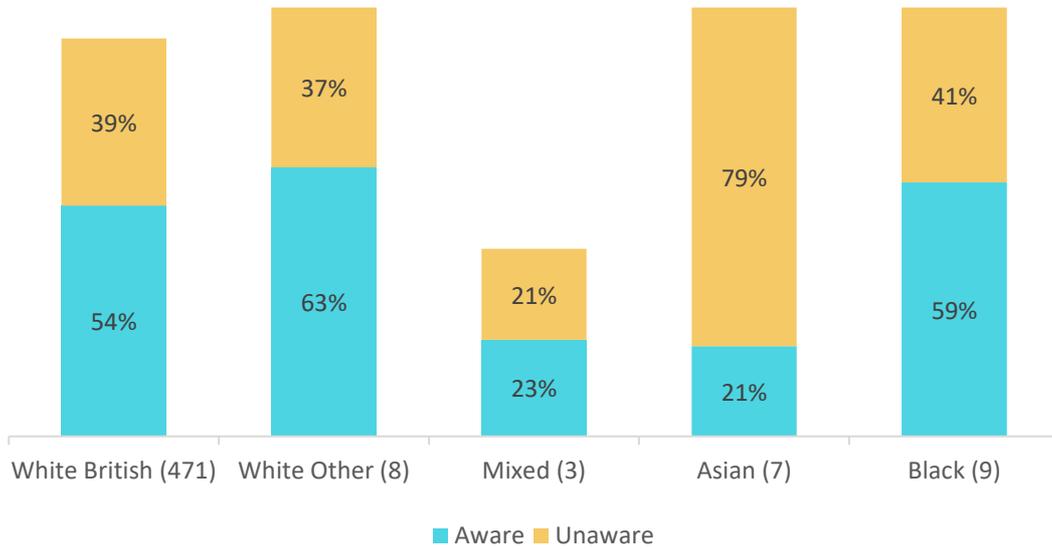
For Essex & Suffolk Water, those always struggling to pay their bills lead in awareness of the social tariff, but at a considerably lower level of 60% compared to Northumbrian Water. There were no significant differences in awareness between these groups. Similar to Northumbrian Water, those always struggling to pay their bills were more likely to qualify for the social tariff and returned a higher level of awareness, which is a positive note.

### Social tariff awareness by financial difficulties - Essex & Suffolk Water (569)



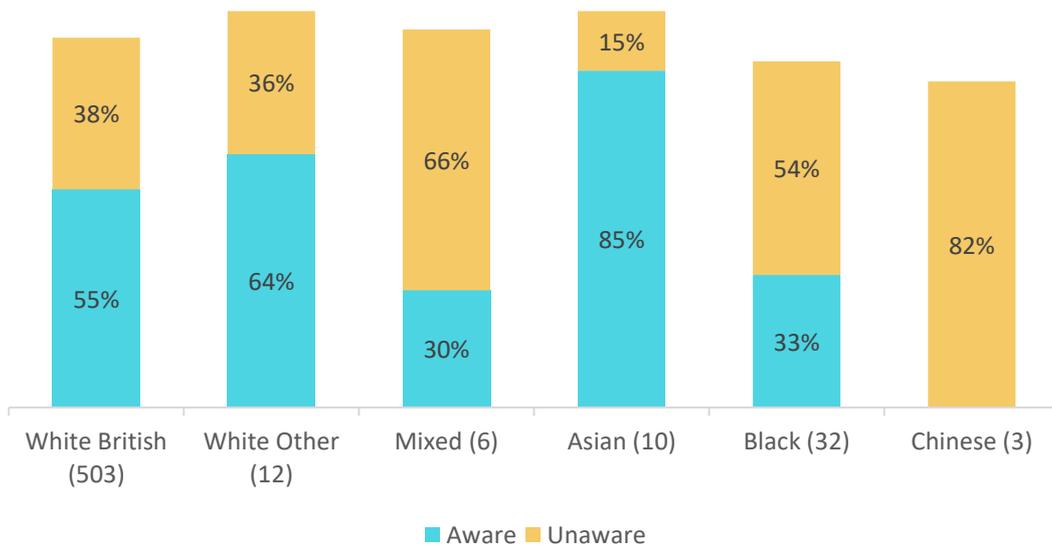
For Northumbrian Water, awareness of the social tariff was highest among White Other at 63%, but there were no significant differences between ethnic groups in awareness.

**Social tariff awareness by ethnicity - Northumbrian Water (500)**



For Essex & Suffolk Water, awareness of the social tariff was highest among Asian customers, who are significantly more likely to be aware of the social tariff than Mixed, Black and Chinese ethnic groups.

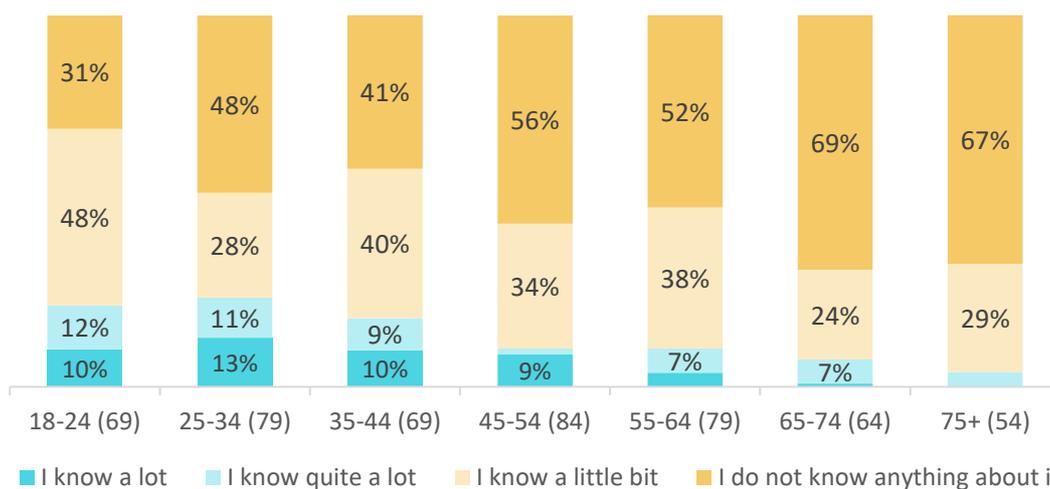
**Social tariff awareness by ethnicity - Essex & Suffolk Water (569)**



## Appendix 7 – Customer knowledge of the social tariff by key demographics

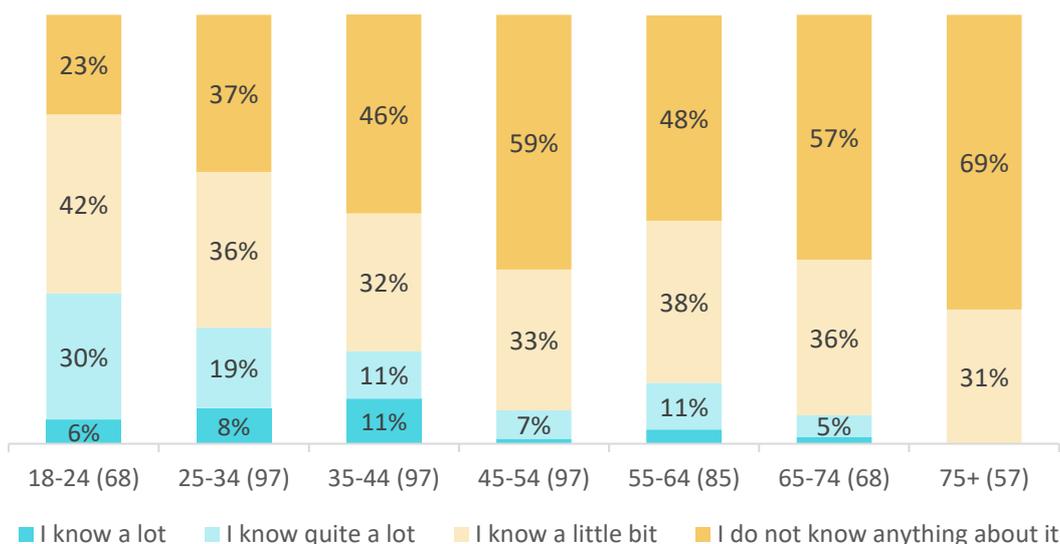
For Northumbrian Water customers, knowledge of the social tariff was highest among the age group 25-34, which was significantly higher than the age group 55-74 and those aged 75 and over.

**Social tariff knowledge by age - Northumbrian Water (500)**



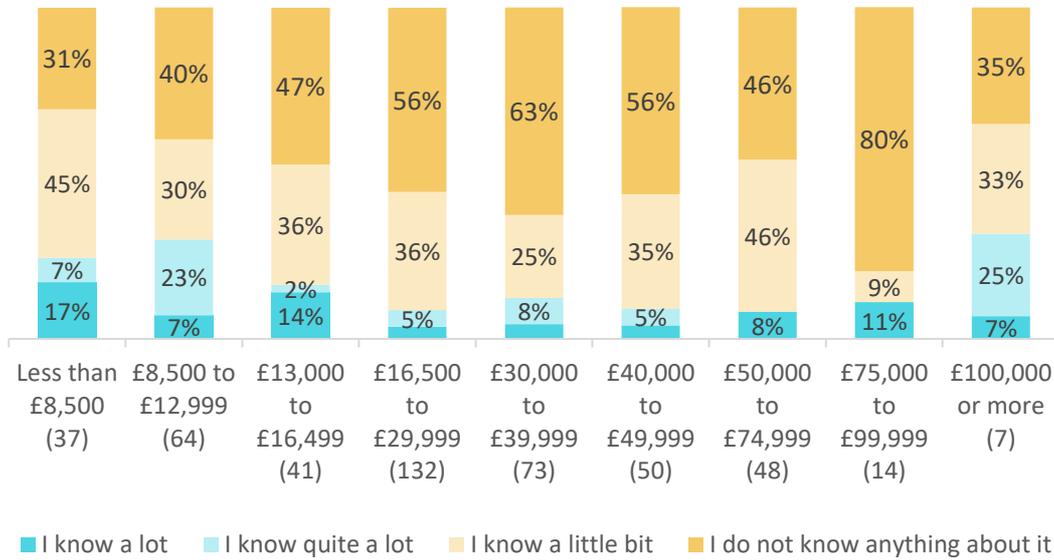
Unlike Northumbrian Water, social tariff knowledge among Essex & Suffolk Water customers was highest among the age group 35-44, which was significantly higher than the age groups 45-54, 55-74 and those aged 75 or older.

**Social tariff knowledge by age - Essex & Suffolk Water (569)**



For Northumbrian Water, social tariff knowledge was highest among those with a household income of less than £8,500, which was significantly higher than income groups £16,500 to £49,999.

### Social tariff knowledge by income - Northumbrian Water (500)



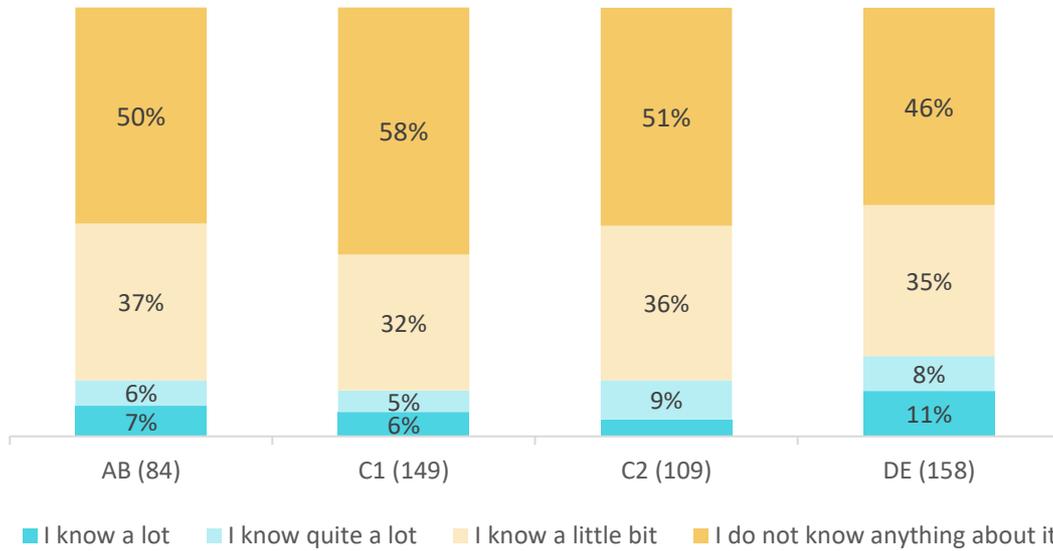
Much like Northumbrian Water, social tariff knowledge was highest among those who have a household income of less than £8,500, which was significantly higher than groups £8,500 to £39,999.

### Social tariff knowledge by income - Essex & Suffolk Water (569)



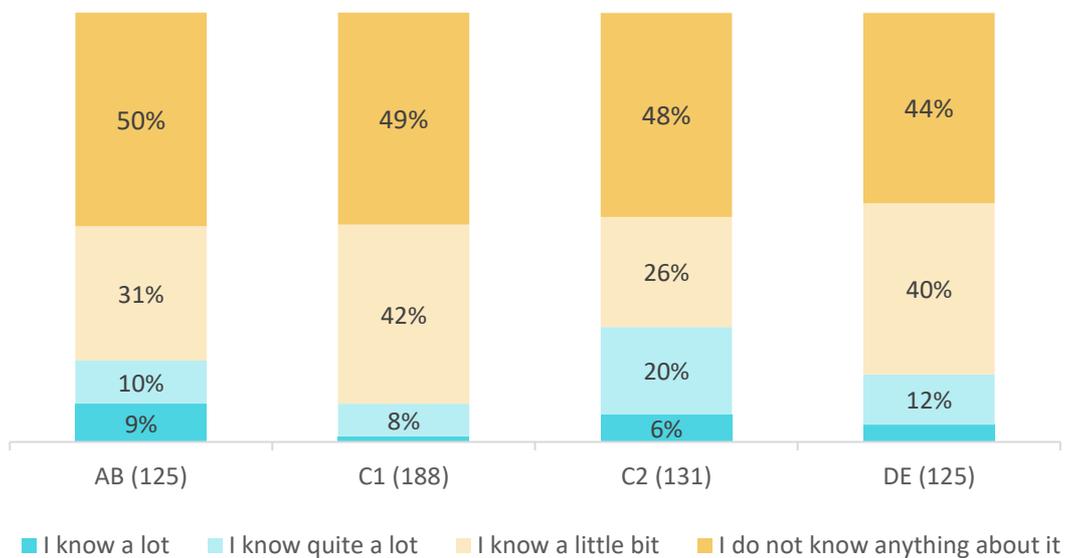
For Northumbrian Water customers, SEG DE lead in knowledge of the social tariff, which was significantly higher than SEG C2.

**Social tariff knowledge by SEG - Northumbrian Water (500)**



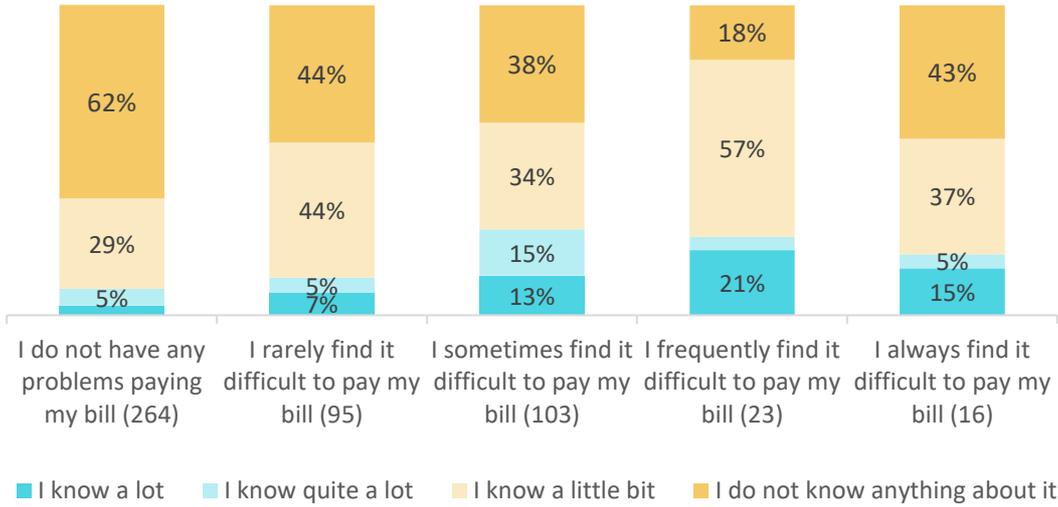
Unlike Northumbrian Water, knowledge of the social tariff in Essex & Suffolk Water area was highest among SEG AB at 9%, which was significantly higher than SEG C1.

**Social tariff knowledge by SEG - Essex & Suffolk Water (569)**



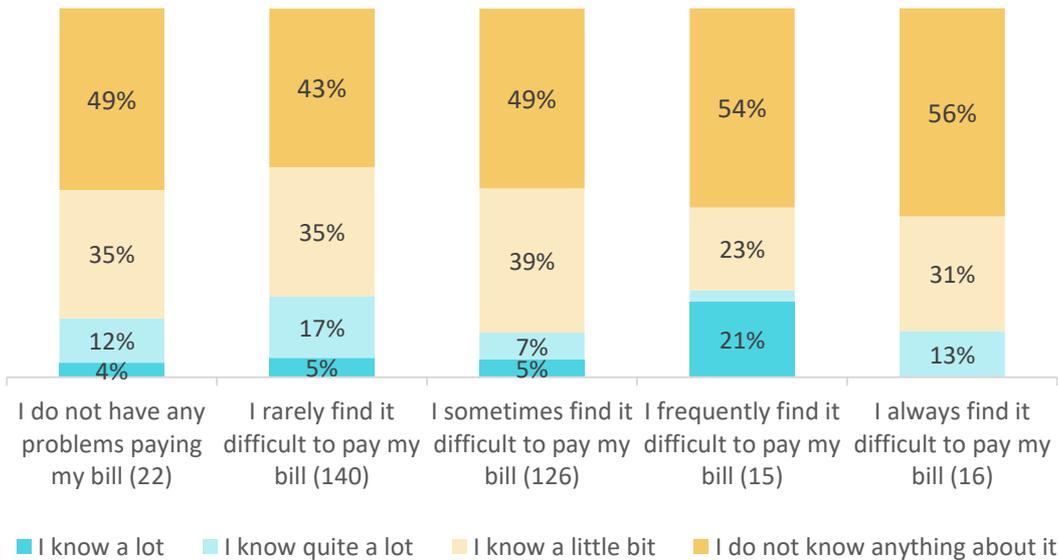
For Northumbrian Water customers, knowledge was highest among those who sometimes find it difficult to pay their bills, which was significantly higher than those who do not have any problems paying their bills.

### Social tariff knowledge by finances - Northumbrian Water (500)



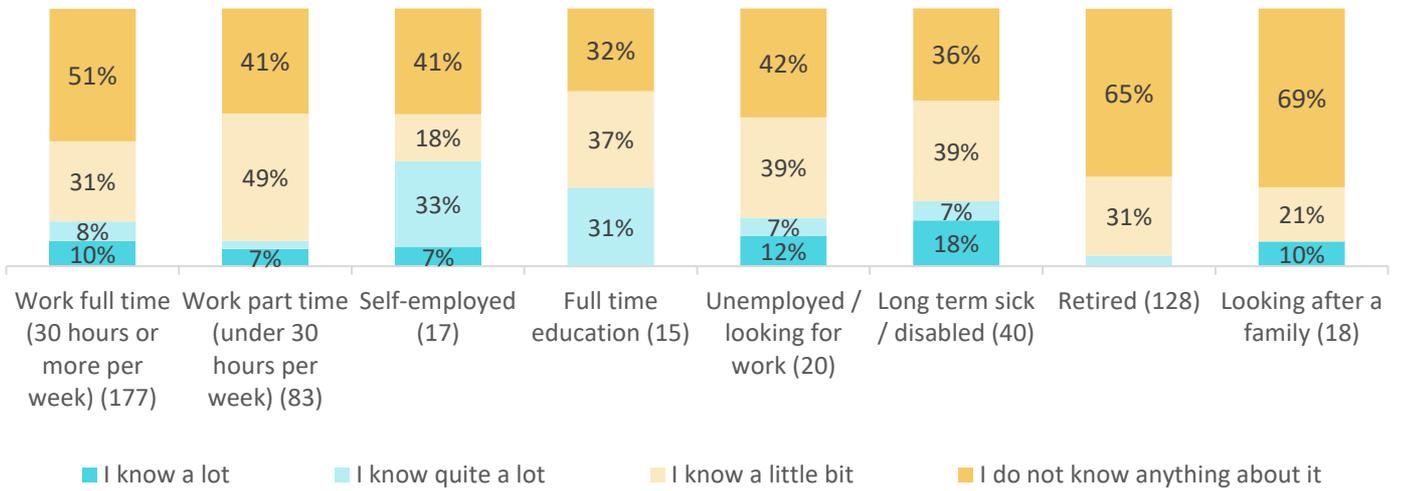
Unlike Northumbrian Water, for Essex & Suffolk Water customers, those who frequently find it difficult to pay their bills lead in social tariff knowledge, which was significantly higher than groups 'I do not have any problems...', 'I rarely find it difficult...' and 'I sometimes find it difficult...'.

### Social tariff knowledge by finances - Essex & Suffolk Water (569)



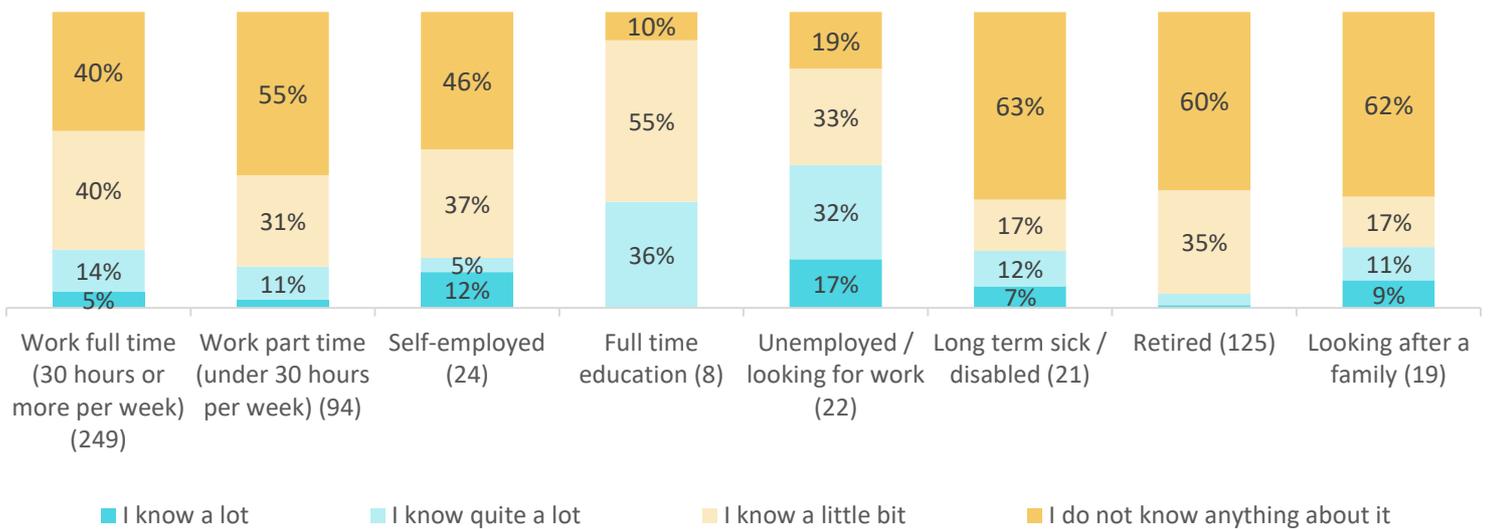
For Northumbrian Water customers, those classified as long-term sick/disabled returned the highest levels of knowledge of the social tariff, which was significantly higher than those who are retired.

### Social tariff knowledge by employment status - Northumbrian Water (500)



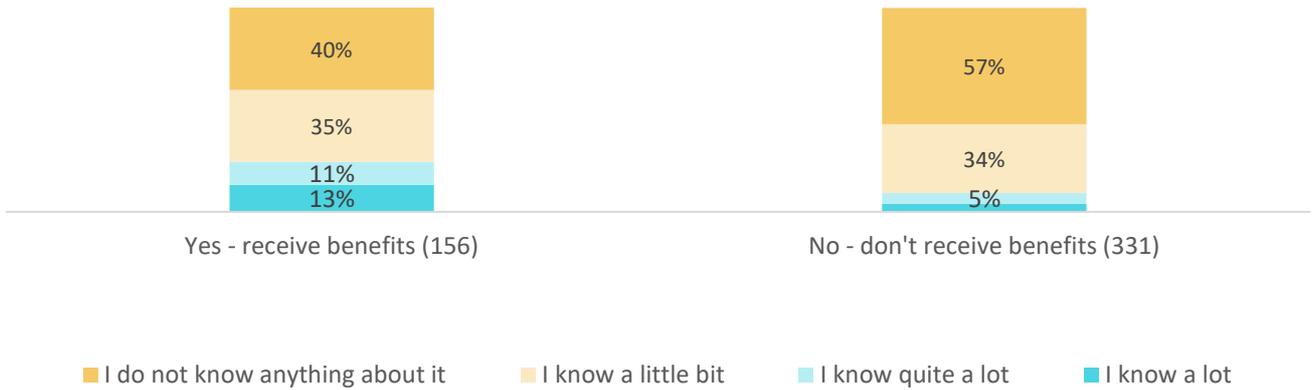
In the Essex & Suffolk Water area, those who are unemployed had the highest levels of social tariff knowledge, which was significantly higher than those working part time or who are retired.

### Social tariff knowledge by employment status - Essex & Suffolk Water (569)



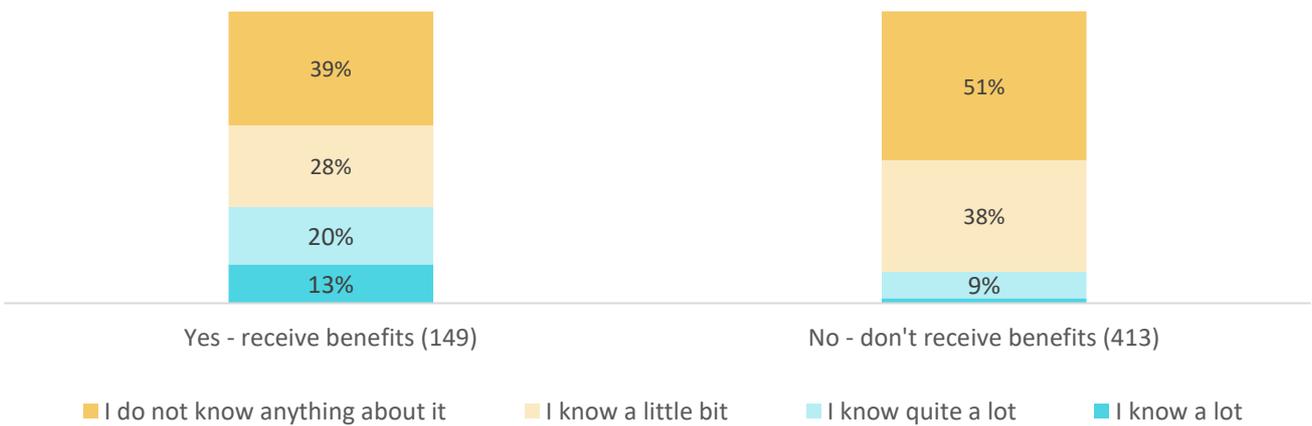
In the Northumbrian Water area, customers who receive benefits were significantly more likely to have a greater knowledge of the social tariff than those who do not receive benefits.

### Social tariff knowledge by benefits - Northumbrian Water (500)



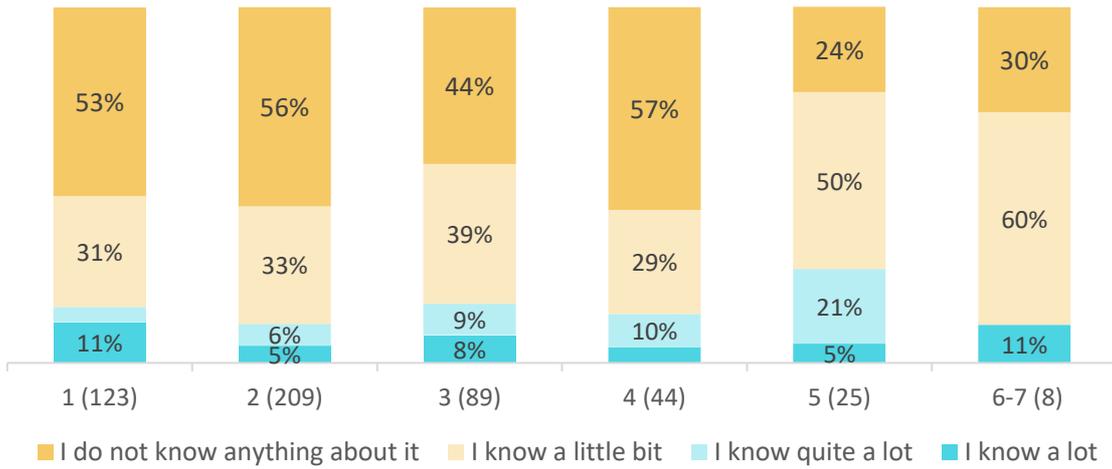
Much like Northumbrian Water, for Essex & Suffolk Water customers, those who receive benefits were significantly more likely to have a higher level of knowledge about the social tariff than those who do not receive benefits.

### Social tariff knowledge by benefits - Essex & Suffolk Water (569)



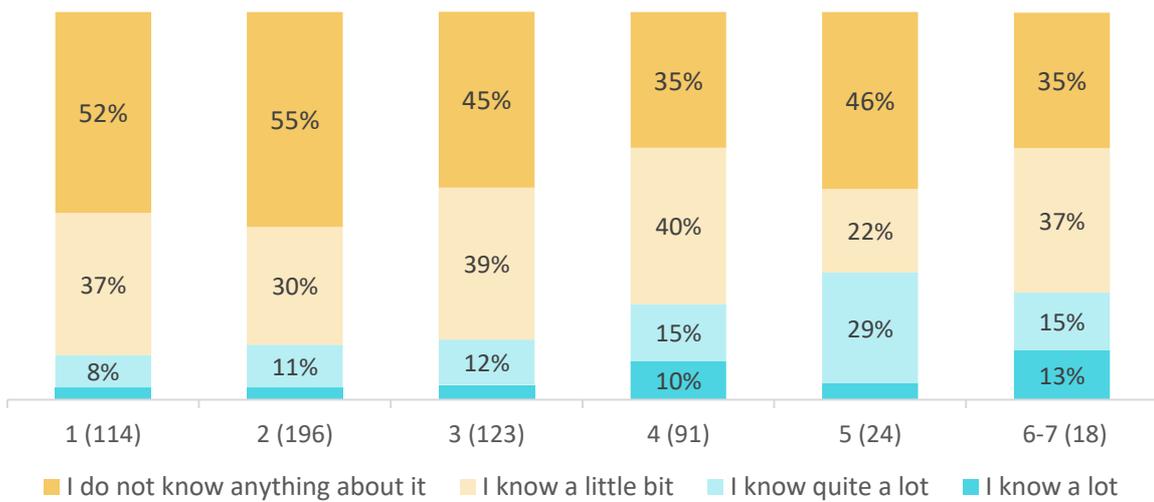
In the Northumbrian Water area, knowledge of the social tariff was joint highest among single person and six-seven person households. However, single person households were significantly more likely to have knowledge of the social tariff than two-person households.

**Social tariff knowledge by household size - Northumbrian Water (500)**



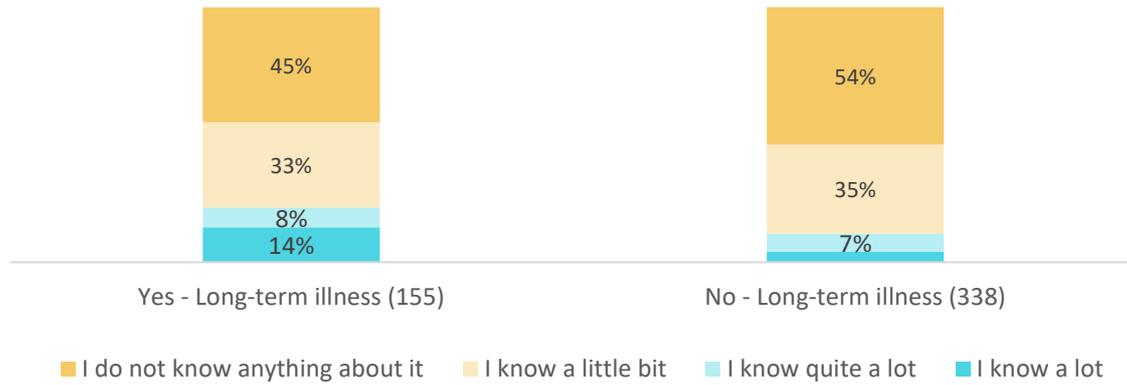
Looking at the Essex & Suffolk Water area, knowledge levels were highest among those living in six-seven person households, which was significantly higher than both single person and two-person households.

**Social tariff knowledge by household size - Essex & Suffolk Water (569)**



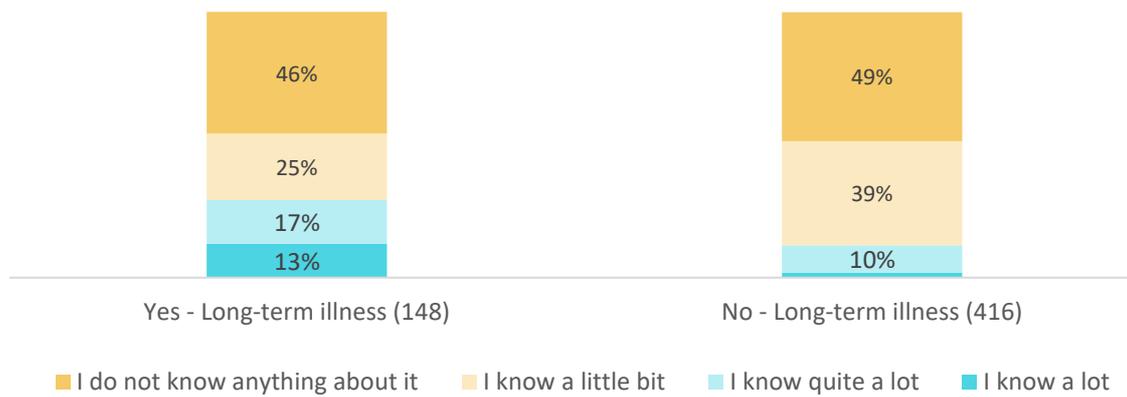
For Northumbrian Water customers, those with a long-term illness were significantly more likely to have knowledge of the social tariff than those without.

### Social tariff knowledge by long-term illness - Northumbrian Water (500)



Much like Northumbrian Water, in the Essex & Suffolk Water area, customers with a long-term illness were significantly more likely to have knowledge of the social tariff than those without.

### Social tariff knowledge by long-term illness - Essex & Suffolk Water (569)



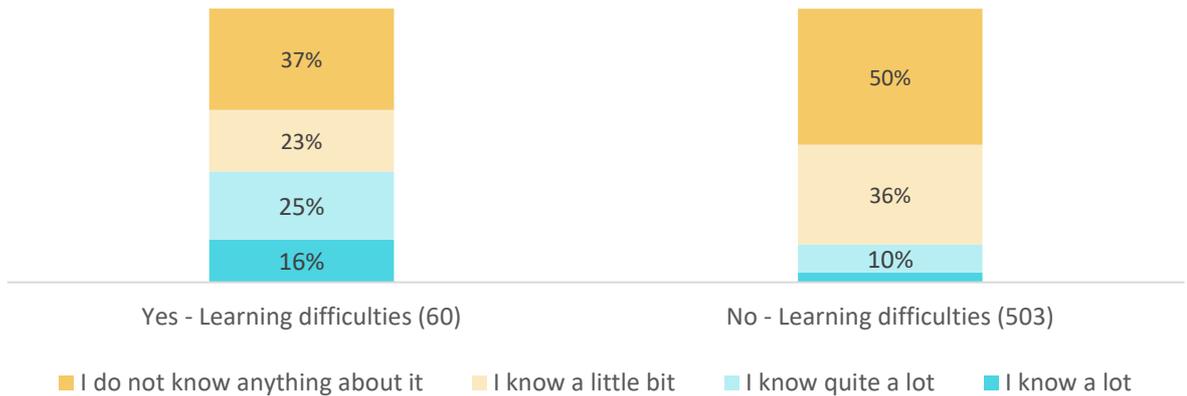
For Northumbrian Water customers, those living with someone who has learning difficulties were significantly more likely to have knowledge of the social tariff than those who do not.

### Social tariff knowledge by learning difficulties - Northumbrian Water (500)



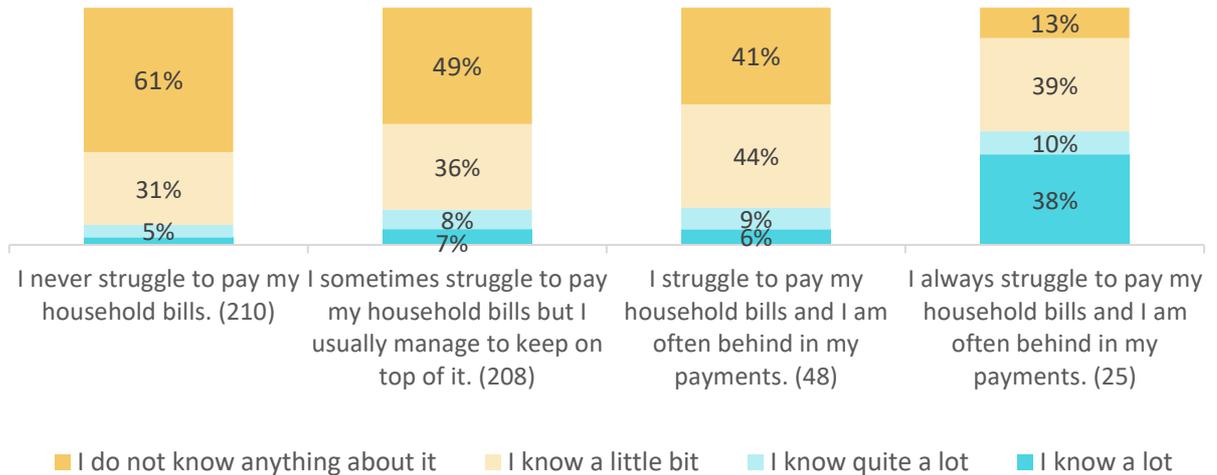
Similar to Northumbrian Water, in the Essex & Suffolk Water area, customers living with someone who has a learning difficulty were significantly more likely to have knowledge of the social tariff than those who do not, though less so than Northumbrian Water customers.

### Social tariff knowledge by learning difficulties - Essex & Suffolk Water (569)



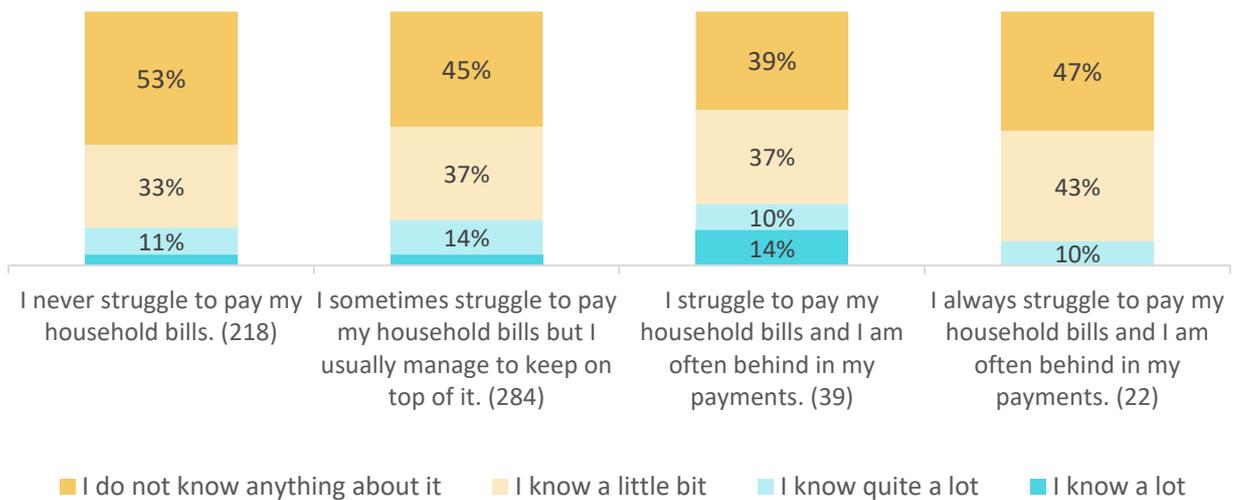
For Northumbrian Water customers, knowledge of the social tariff was significantly higher among those who always struggle to pay their household bills and are often behind on their payments. As those who always struggle to pay are more likely to qualify for the social tariff, the higher knowledge levels among this group are positive.

**Social tariff knowledge by financial difficulties - Northumbrian Water (500)**



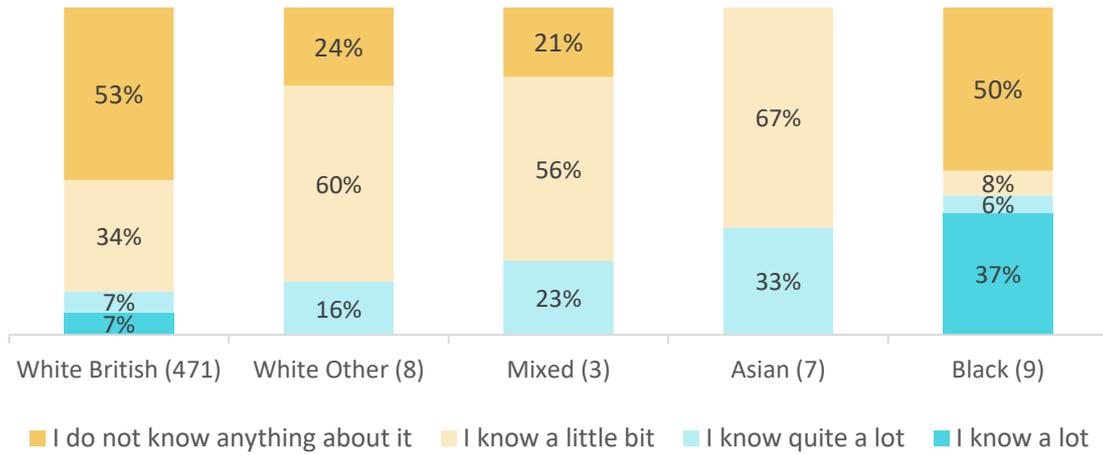
Unlike Northumbrian Water, for Essex & Suffolk Water customers, knowledge was highest among those who struggle to pay their bills and are often behind on their payments. This was significantly higher than those who never or sometimes struggle. Although higher knowledge levels among those who struggle to pay their bills is positive, 'I know a lot' was 0% for those who always struggle to pay their bills. As this group is more likely to qualify for the social tariff, increasing knowledge among this group would be beneficial.

**Social tariff knowledge by financial difficulties - Essex & Suffolk Water (569)**



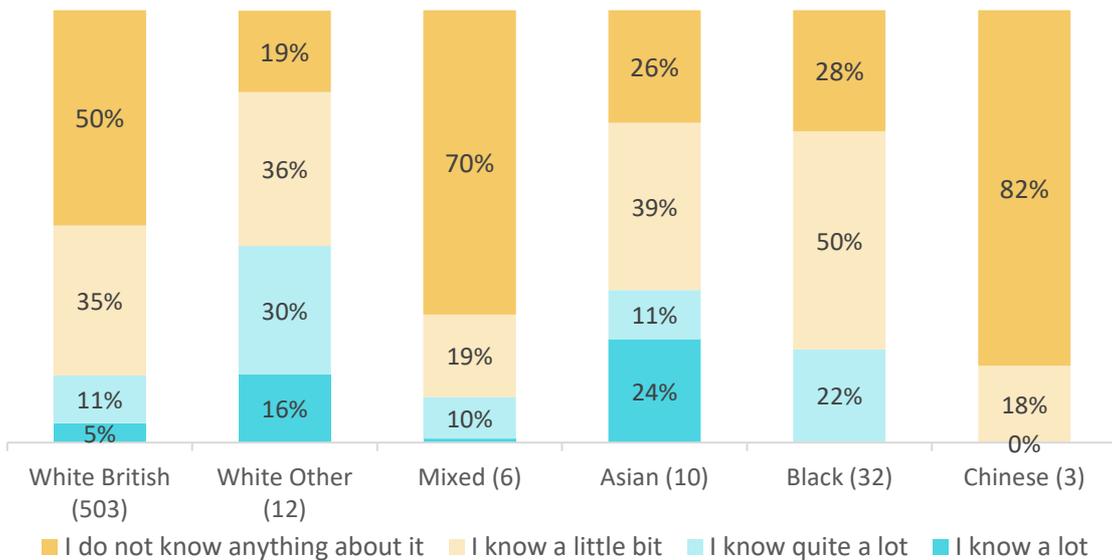
For Northumbrian Water customers, those who identify as Black were significantly more likely to have knowledge of the social tariff than those who identify as White British.

### Social tariff knowledge by ethnicity - Northumbrian Water (500)



Differing from Northumbrian Water, for Essex & Suffolk Water customers, knowledge of the social tariff was highest among those who identify as Asian, which was significantly higher than both White British and Black.

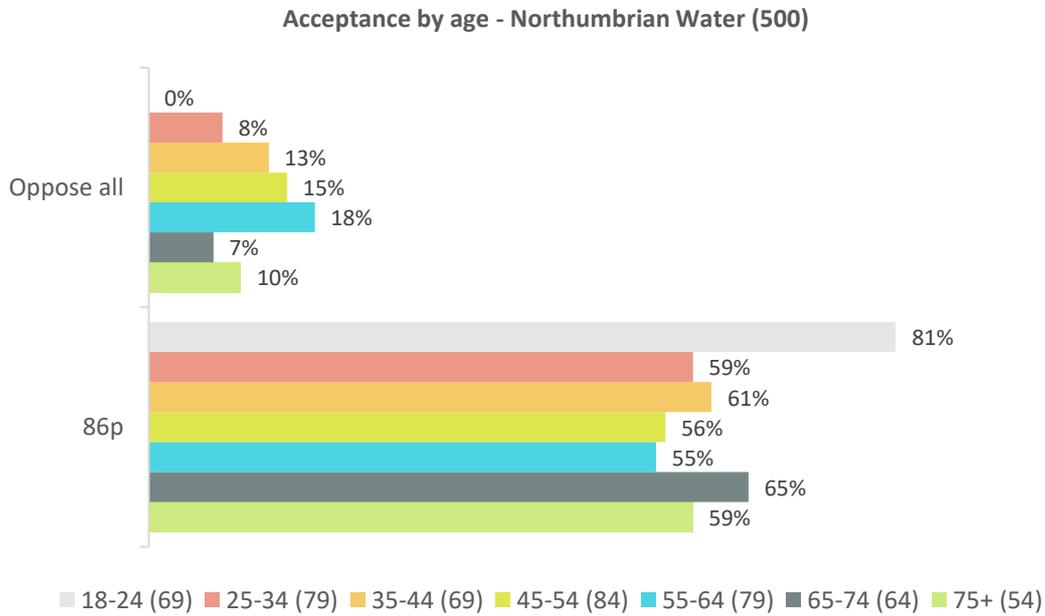
### Social tariff knowledge by ethnicity - Essex & Suffolk Water (569)



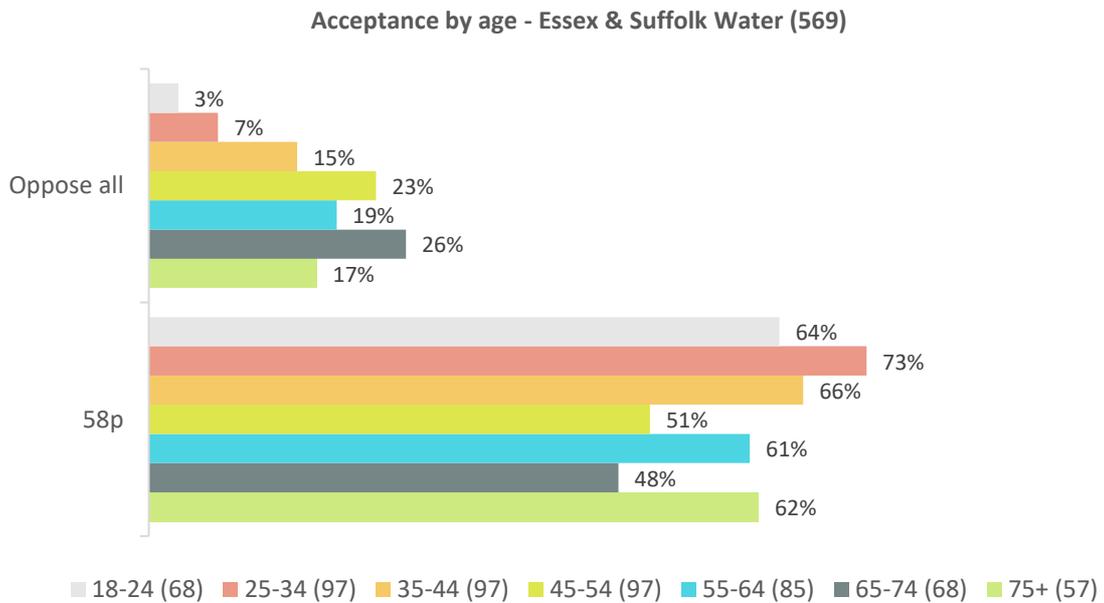
## **Appendix 8 – Willingness to contribute towards the social tariff by key demographics**

This section covers acceptance for the higher amount contribution only among demographic groups. This is due to the majority of customers across Northumbrian Water and Essex and Suffolk Water regions supporting the higher pence amount.

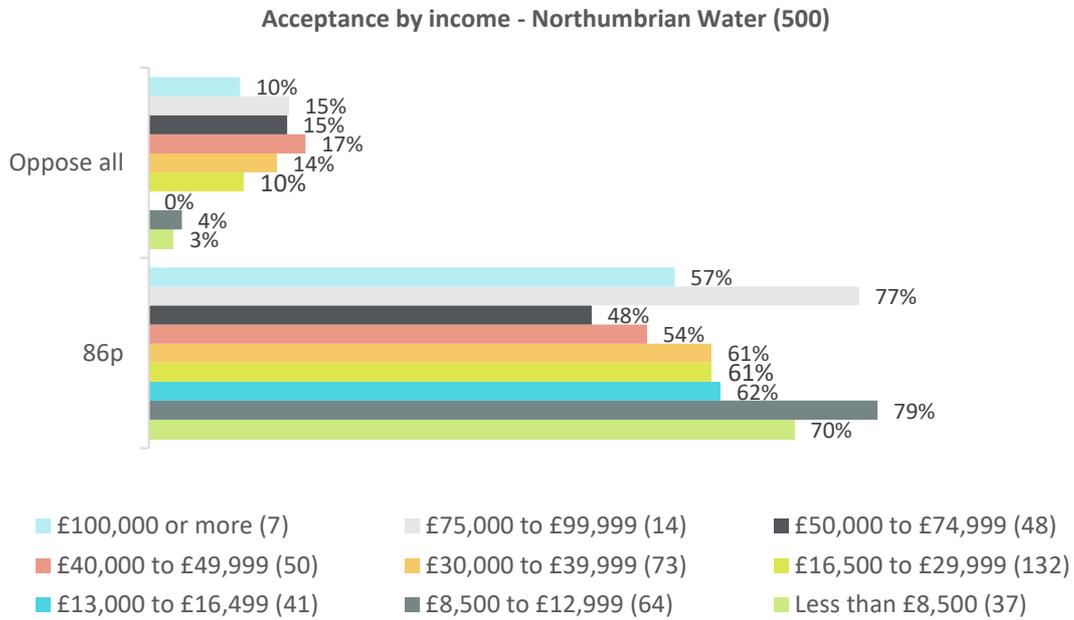
For Northumbrian Water customers, the age group 18-24 returned the highest level of acceptance to pay 86p, which was significantly higher than those in the age group 25-74 and those aged 75 or older. All age groups returned majority level support.



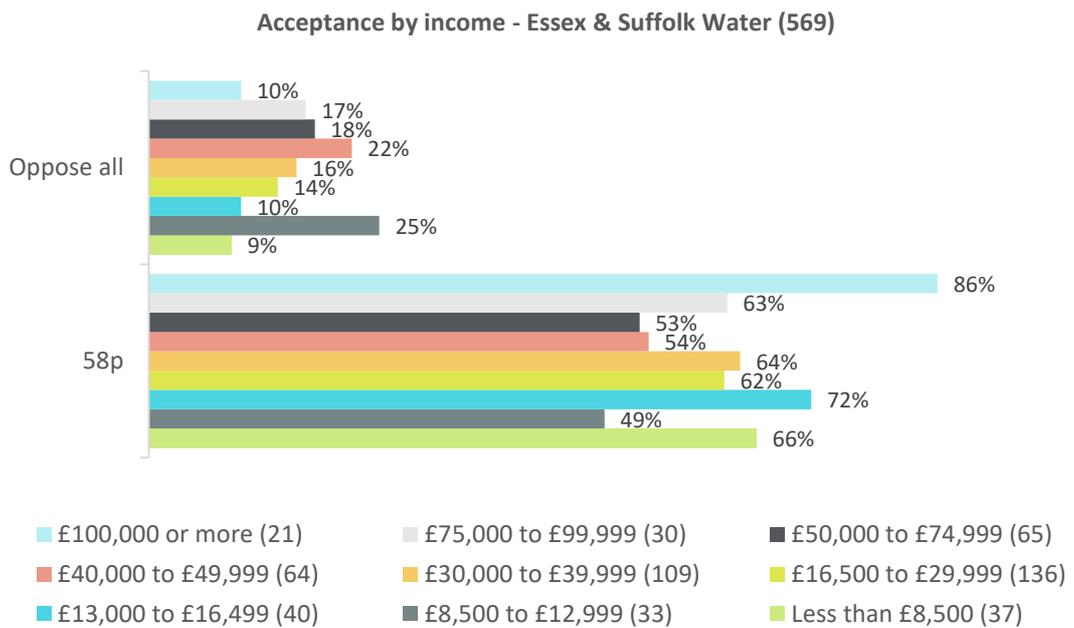
Unlike Northumbrian Water, for Essex & Suffolk Water customers, customers aged 25-34 lead in acceptance of the 58p contribution, significantly higher than those aged between 45-54 and 65-74.



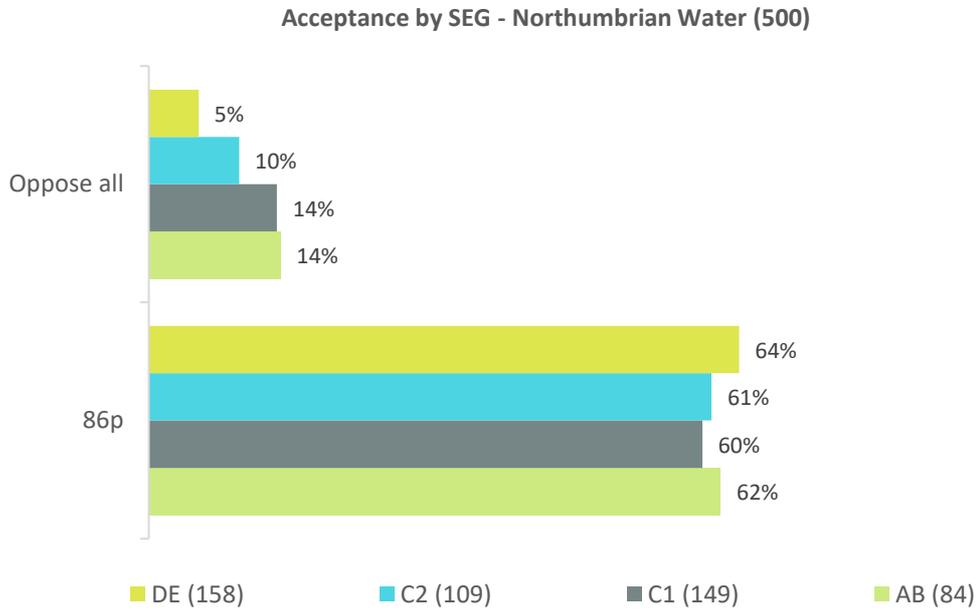
Among Northumbrian Water customers, acceptance of the 86p increase was significantly higher among those earning £8,500 to £12,999, with significant differences between those earning £8,500 to £12,999 and the majority of other income groups.



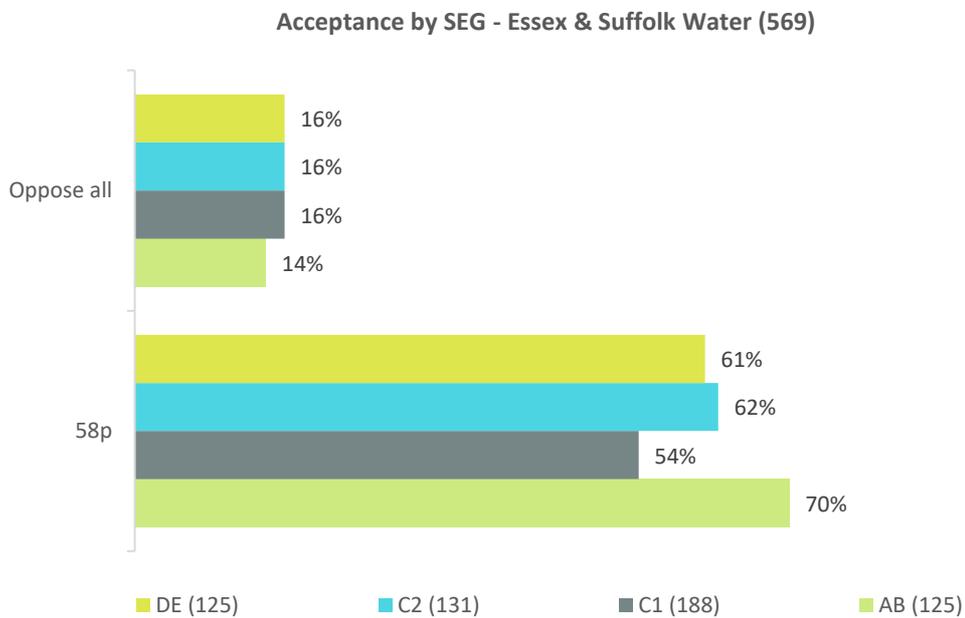
Diverging from Northumbrian Water, Essex & Suffolk Water customers with a household income exceeding £100,000 lead in 58p acceptance, which was significantly higher than the majority of income groupings.



For Northumbrian Water customers, SEG AB leads in support of an 86p increase, but there were no significant differences between SEG groups, with support converging at the 60+% mark.

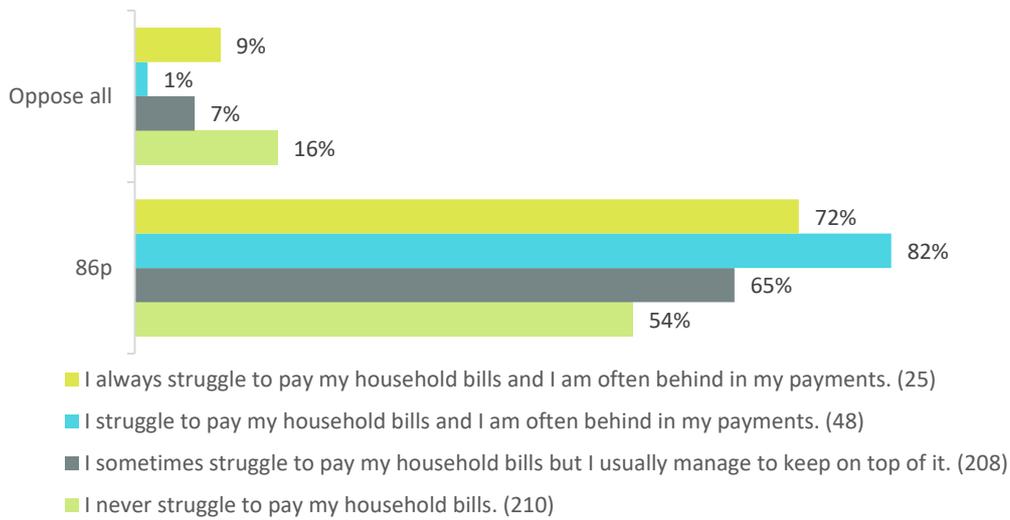


Unlike Northumbrian Water, for Essex & Suffolk Water customers, support for the 58p increase was highest among SEG DE, which was significantly higher than SEG C1.



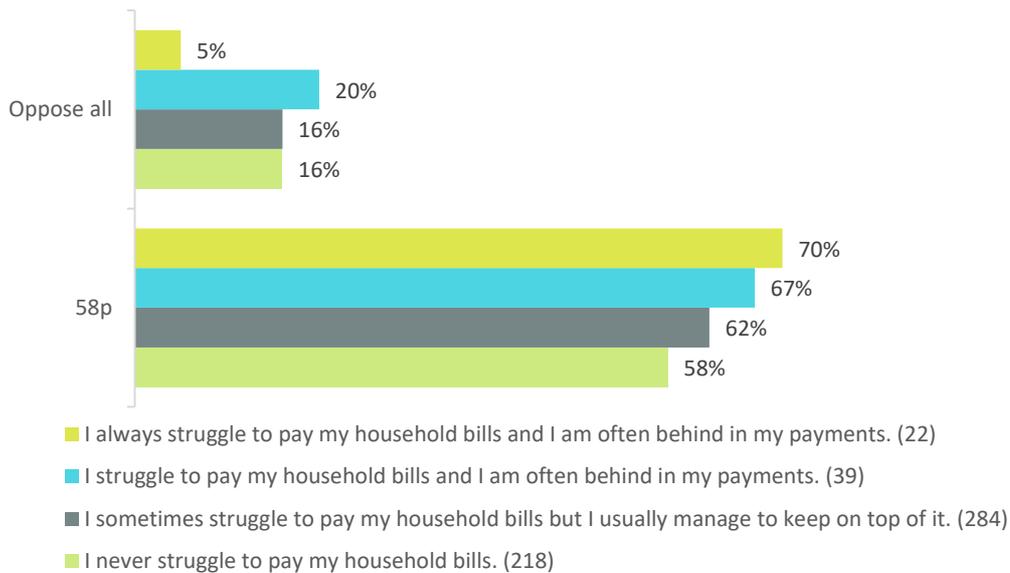
In the Northumbrian Water area, support for the 86p increase was highest among those who struggle to pay their bills and are often behind on their payments, which was significantly higher than all other groups.

### Acceptance by finances - Northumbrian Water (500)



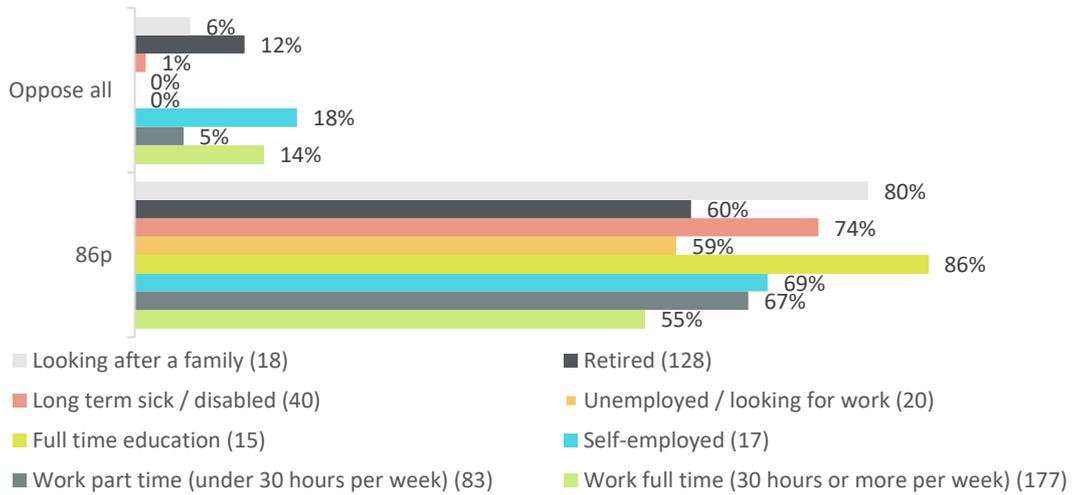
Essex & Suffolk Water customers showed an increase of support by financial status, with support for the 58p amount climbing as finances increase. There were no significant differences between groups.

### Acceptance by finances - Essex & Suffolk Water (569)



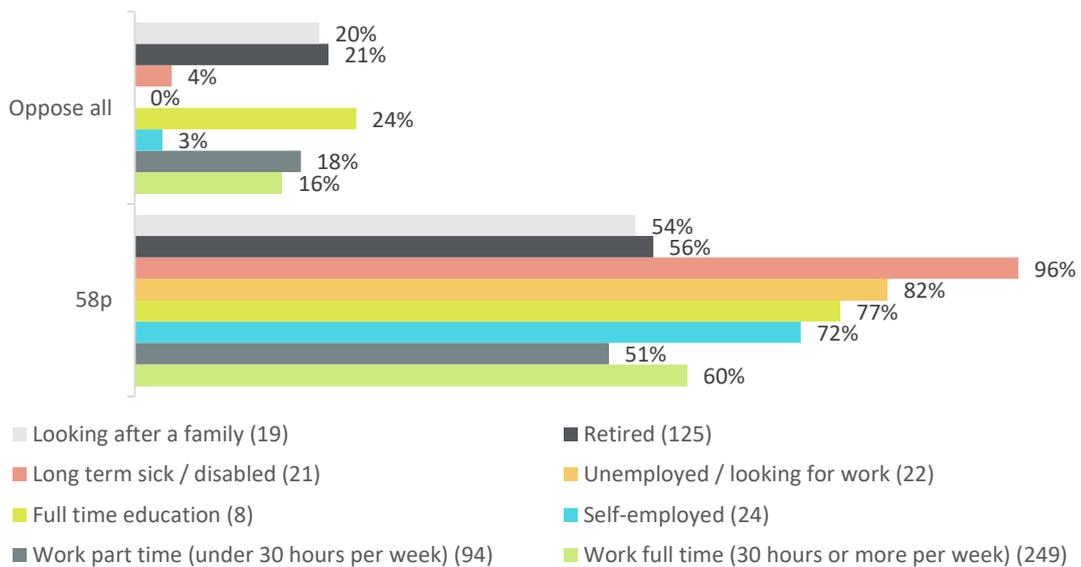
For Northumbrian Water customers, those in full time education had the highest levels of support for the 86p increase, which was significantly higher than those working full time or retired.

**Acceptance by employment status - Northumbrian Water (500)**

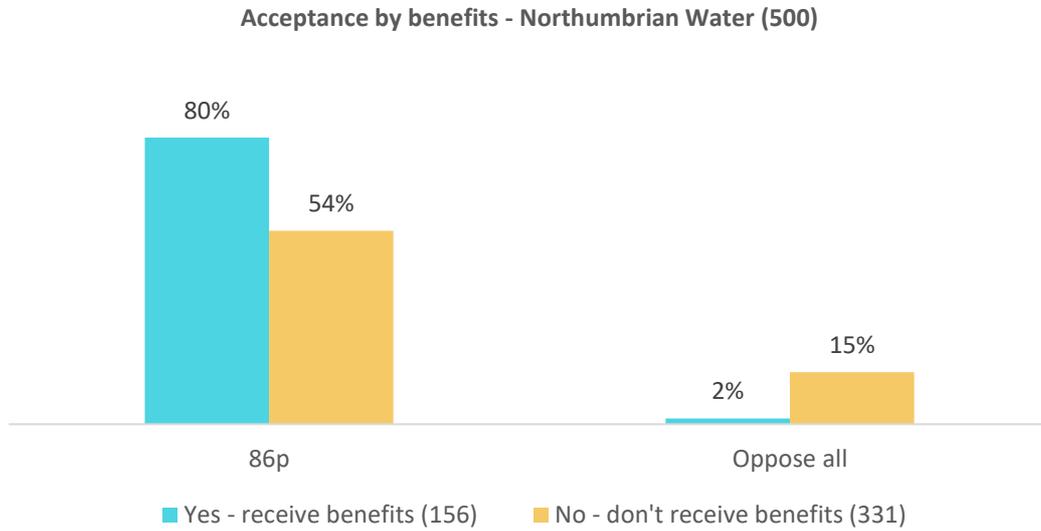


Unlike Northumbrian Water, for Essex & Suffolk Water, support was highest among those who are long term sick/disabled, which was significantly higher than those working full time, part time, self-employed, and retired.

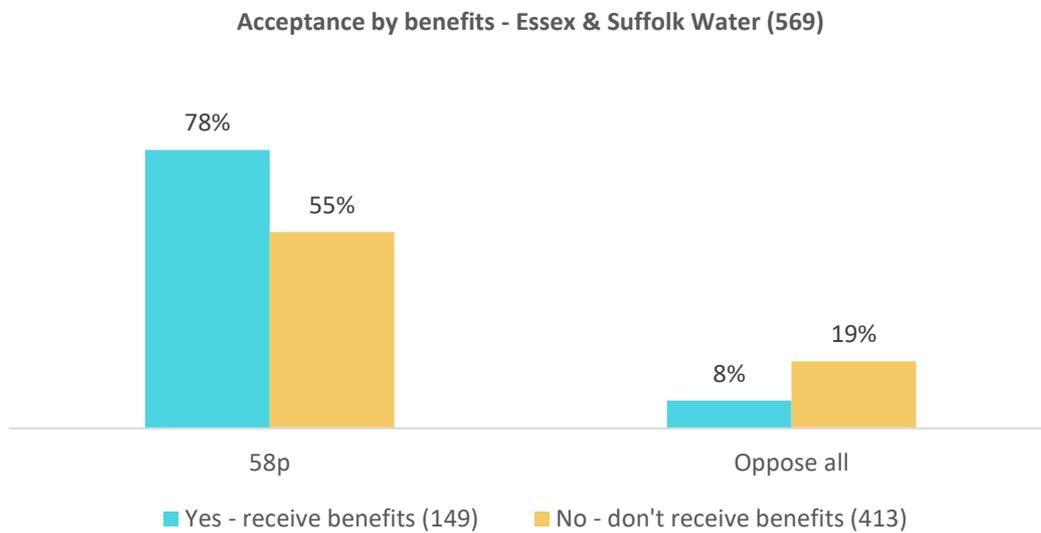
**Acceptance by employment status - Essex & Suffolk Water (569)**



For Northumbrian Water customers, those who live with someone who receives benefits were significantly more likely to support the 86p increase, returning an agreement rate of 80%.

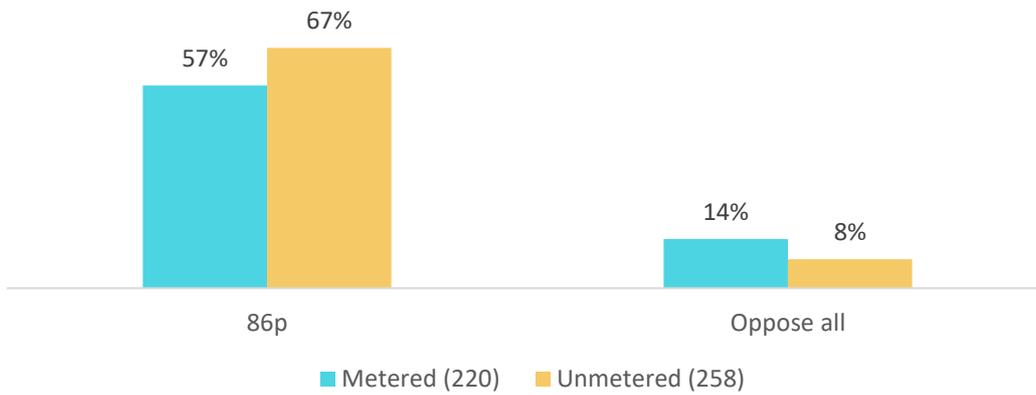


Essex & Suffolk Water customers returned a similar rate of approval for the higher 58p, with significant differences between benefit recipient groups. However, benefits recipients who oppose all increases was 6% higher among Essex & Suffolk Water customers than Northumbrian Water.



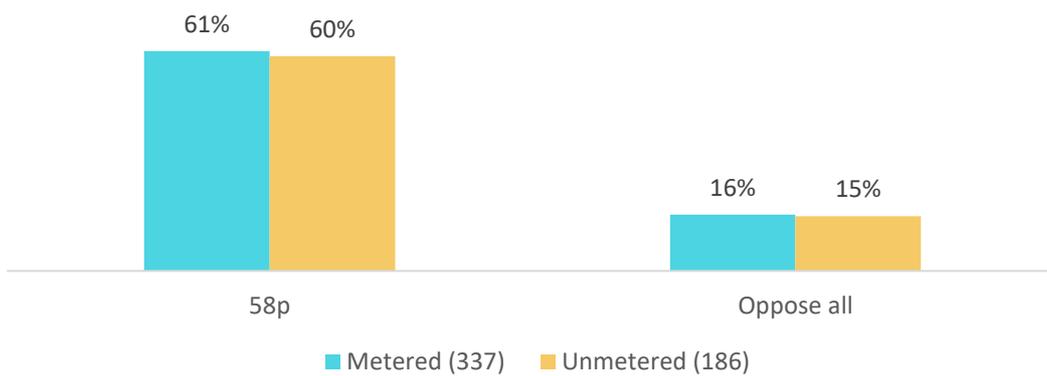
For Northumbrian Water customers, those without a water meter were significantly more likely to support the higher 86p social tariff contribution.

**Acceptance by meter status - Northumbrian Water (500)**

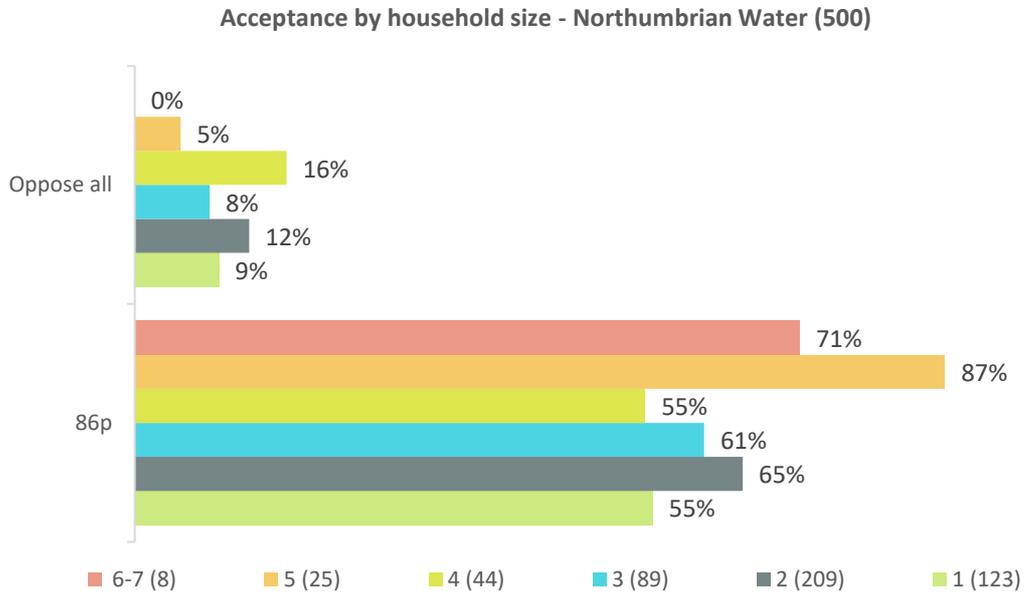


Essex & Suffolk Water customers shared almost equal levels of support for the higher 58p social tariff contribution, regardless of water meter status.

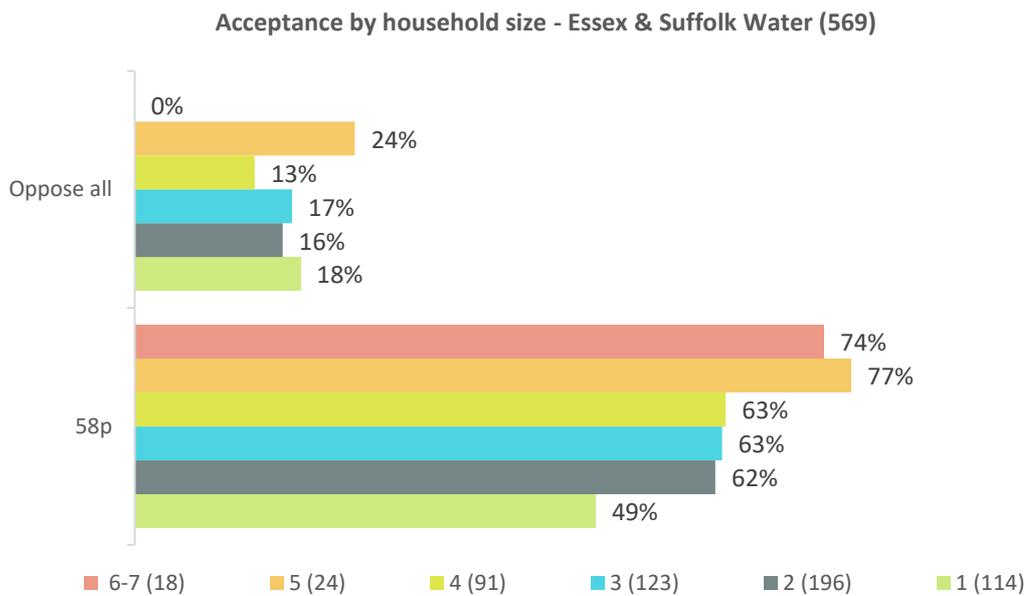
**Acceptance by meter status - Essex & Suffolk Water (569)**



Support for the 86p increase among Northumbrian Water customers was highest among five-person households, which was significantly higher than one-four person households.

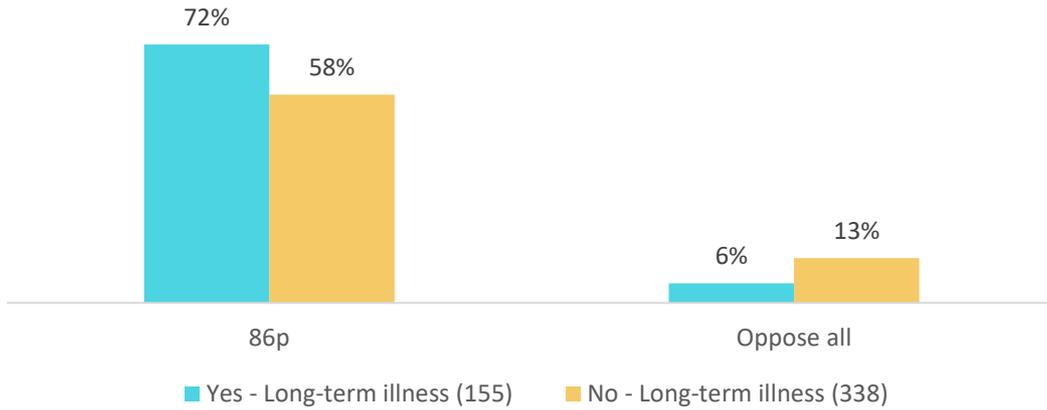


Essex & Suffolk Water customers who live in a five-person household returned the highest levels of agreement to the 58p amount, similar to Northumbrian Water. However, single person households were significantly less likely to agree to this amount, with significant differences from all household size groups relating to agreement.



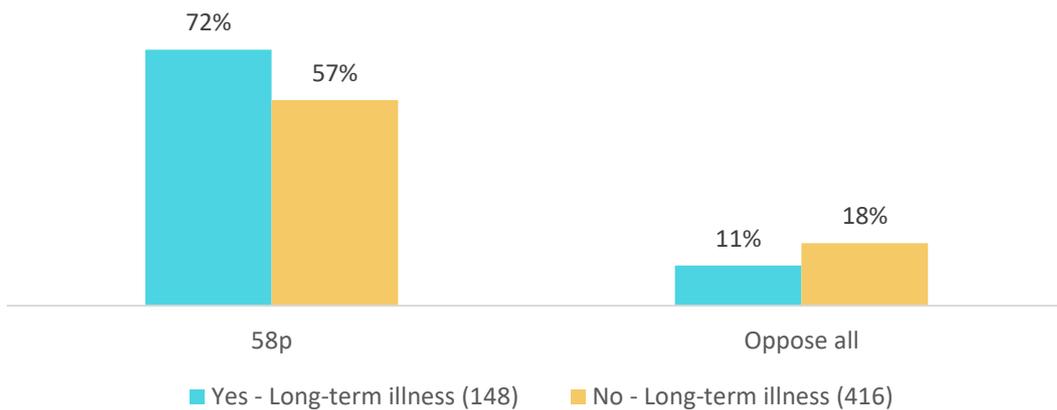
In the Northumbrian Water area, those living with someone who has a long-term illness were significantly more likely to agree to the higher 86p social tariff contribution, with an agreement level of 72%.

**Acceptance by long-term illness - Northumbrian Water (500)**



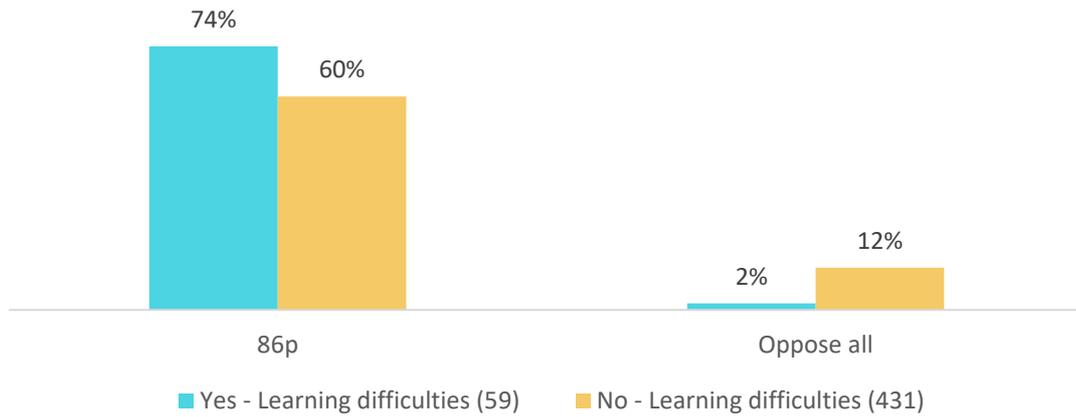
For Essex & Suffolk Water, customers living with someone who has a long-term illness were more likely to agree to the higher 58p social tariff contribution than those who do not.

**Acceptance by long-term illness - Essex & Suffolk Water (569)**



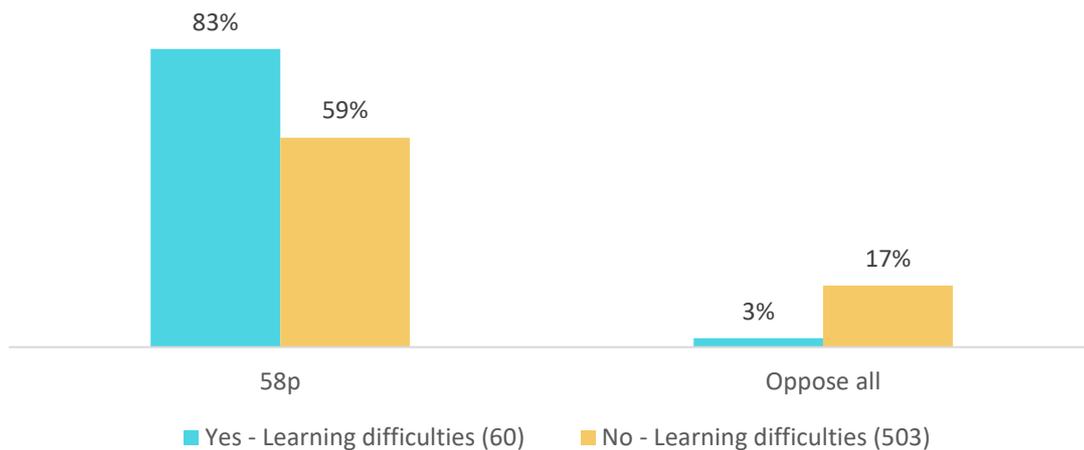
For Northumbrian Water customers, those living with someone who has learning difficulties were significantly more likely to support the higher 86p increase toward the social tariff than those who do not.

#### Acceptance by learning difficulties - Northumbrian Water (500)

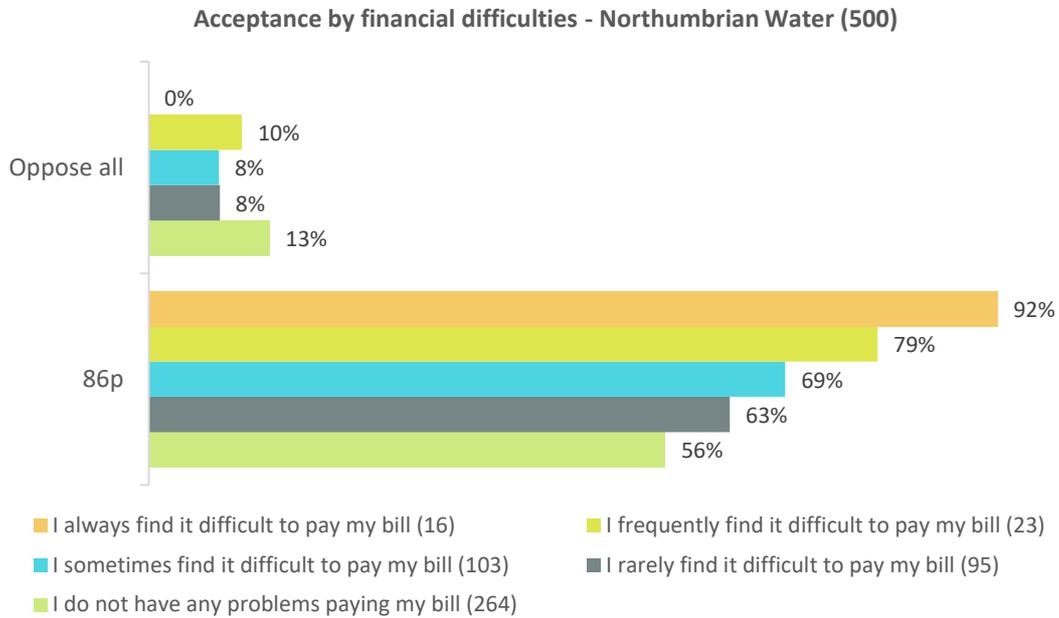


While those not living with someone who has a learning difficulty is consistent with Northumbrian Water, Essex & Suffolk Water customers who live with someone who has a learning difficulty returned a higher agreement level of 83%. This was significantly higher than those not living with someone who has learning difficulties.

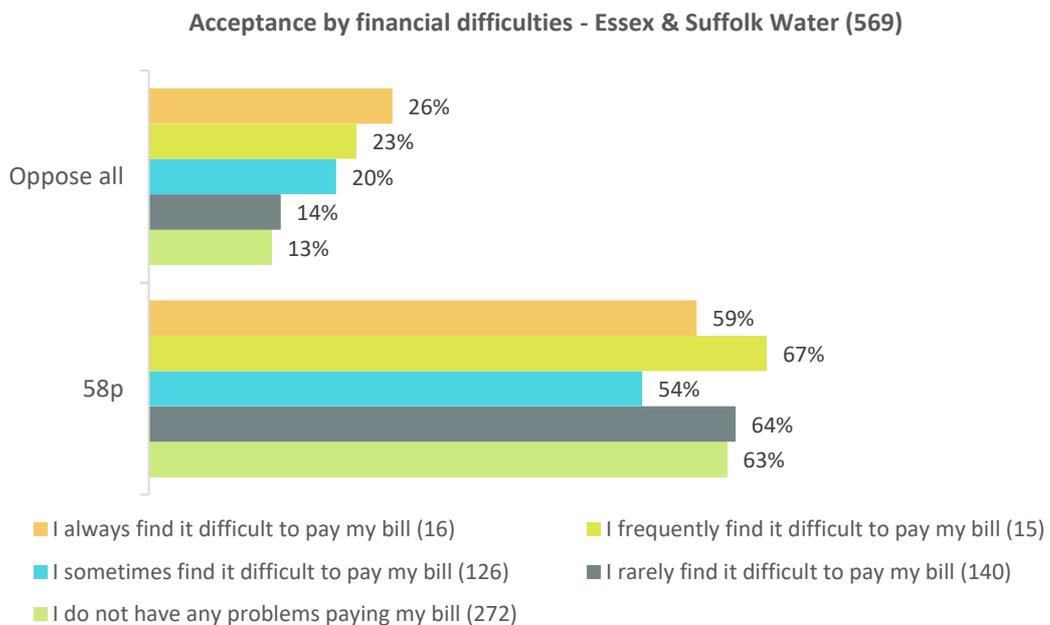
#### Acceptance by learning difficulties - Essex & Suffolk Water (569)



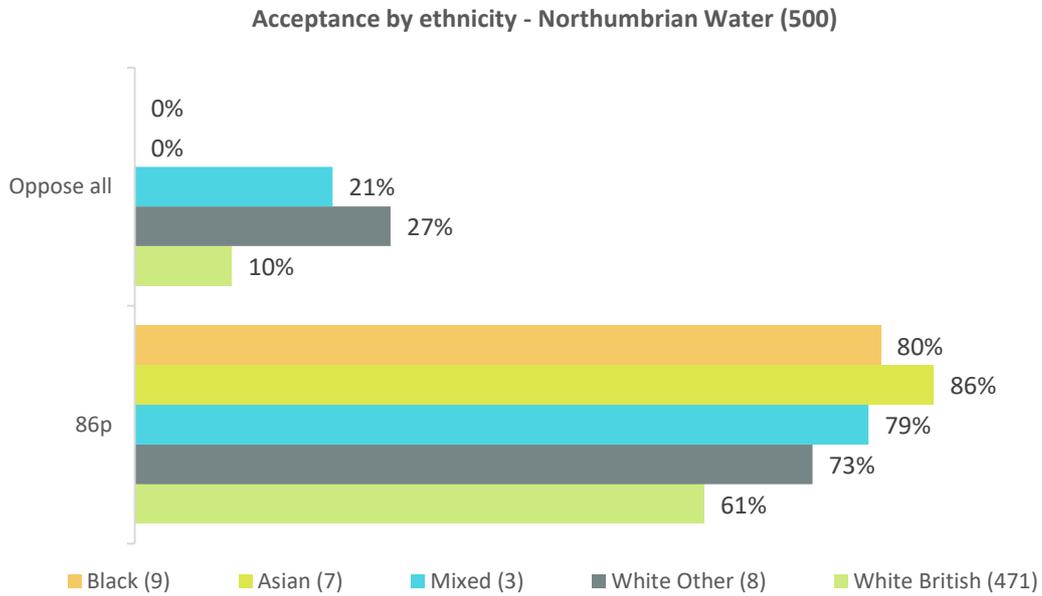
For Northumbrian Water customers, those always struggling to pay their bills returned an almost universal level of support for the 86p increase. This was significantly higher than those having no problem, rarely finding it difficult, and sometimes finding it difficult to pay their bills.



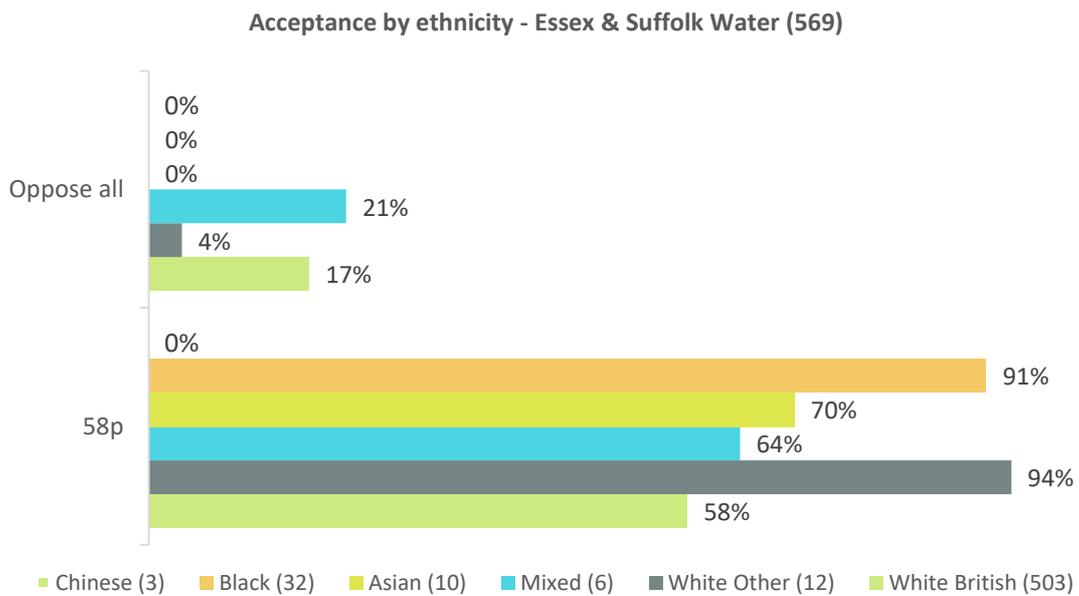
For Essex & Suffolk Water customers, those who sometimes find it difficult to pay their bills led support for the 58p increase at 67%. There were no significant differences between financial status groups.



For Northumbrian Water customers, while those who identify as Asian ethnically led in support of the 86p higher amount, there was no significant difference in agreement. However, the White Other ethnic group was more likely to oppose all increases towards the social tariff.

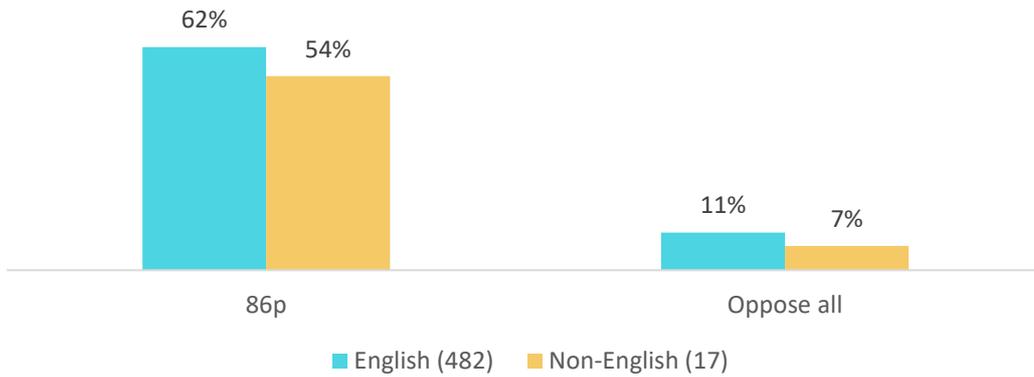


Diverging from Northumbrian Water, for Essex & Suffolk Water customers, the ethnic groups White Other and Black led in support for the higher 58p tariff contribution. Both were significantly higher than White British customers.



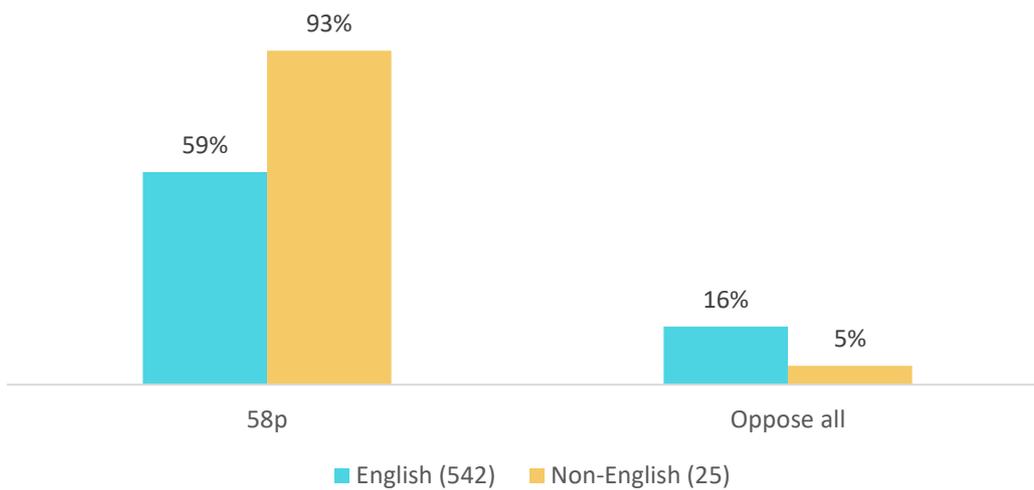
In the Northumbrian Water area, while those speaking English as a first language were more likely to support the higher 86p rate, this was not a significant difference.

**Acceptance by first language - Northumbrian Water (500)**



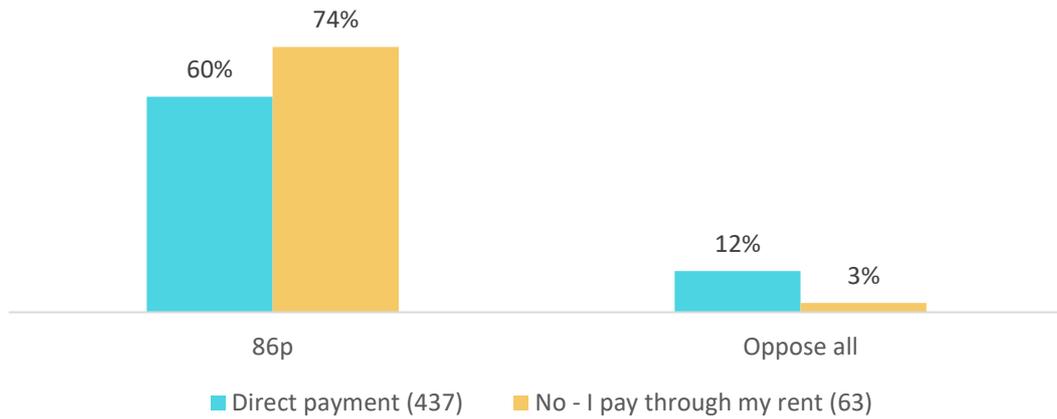
Divergent to Northumbrian Water, Essex & Suffolk Water customers who do not speak English as their first language returned a significantly higher level of support for the higher 58p contribution toward the social tariff than those who do.

**Acceptance by first language - Essex & Suffolk Water (569)**



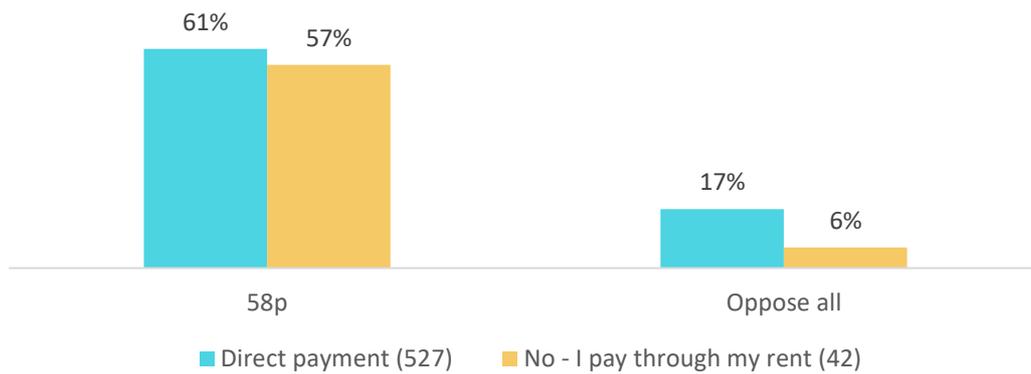
While support for the higher amount had majority support across payment means groups, those who pay Northumbrian Water through their rent were significantly more likely to accept the higher 86p proposed increase towards the social tariff.

**Acceptance by payment means - Northumbrian Water (500)**



Unlike Northumbrian Water customers, those who pay directly to Essex & Suffolk Water were more likely to support the higher 58p increase towards the social tariff. However, this was not significant.

**Acceptance by payment means - Essex & Suffolk Water (569)**





Author: Thomas Waldron

Figure check: Anna Johnson & Ross Palmer

Report check: Sasha Henderson

Final sign off: Kirsty Laing