



# Northumbrian Water Limited

## NWL Acceptability and Affordability Testing: quantitative research

Research report August 2023

# Executive Summary

## Advisory note

The purpose of this executive summary is to provide a high-level summary of the findings of the quantitative stage of Northumbrian Water Limited's (NWL) Acceptability and Affordability Testing (AAT) research. Full detail can be found in the remainder of this report.

## Background and context to Acceptability and Affordability Testing

Northumbrian Water Limited (NWL) serves 2.1 million Households and businesses in two operating areas covered by Northumbrian Water (NW) and Essex & Suffolk Water (ESW). NW is a water and wastewater company while ESW is a water only company.

To meet the prescribed approach outlined by Ofwat and CCW, NWL is required to deliver PR24 AAT research. This testing followed specific guidance developed by Ofwat and CCW to enable results to be compared across the industry. This report is in relation to the quantitative phase of AAT research.

## Ofwat and CCW guidance compliance

The guidance has been strictly adhered to except in circumstances where there was a strong degree of challenge from cognitive testing or the NWL Customer Engagement Panel (CEP) or where specific difficulties were encountered despite best endeavours to follow the guidance. These instances are highlighted in the relevant sections of this report.

## Methodology

A full understanding of how the methodology complied with Ofwat and CCW guidance is available in the methodology section of the full report. The following information acts as an over-arching summary for contextual understanding.

Within the survey respondents were presented with NW/ESW's proposed plan including:

- The plan's bill impact between 2025 and 2030: this information was presented in a personalised bar chart in line with the guidance
- Performance commitments: respondents were shown NW/ESW's comparative performance and proposed future service levels for three water and three wastewater common performance commitments. ESW customers were shown the water performance commitments only
- Enhancements: respondents were presented with a number of enhancements included in the proposed plan; five were presented to NW customers and four to ESW customers

Respondents were asked a series of questions in relation to affordability and acceptability of the plan.

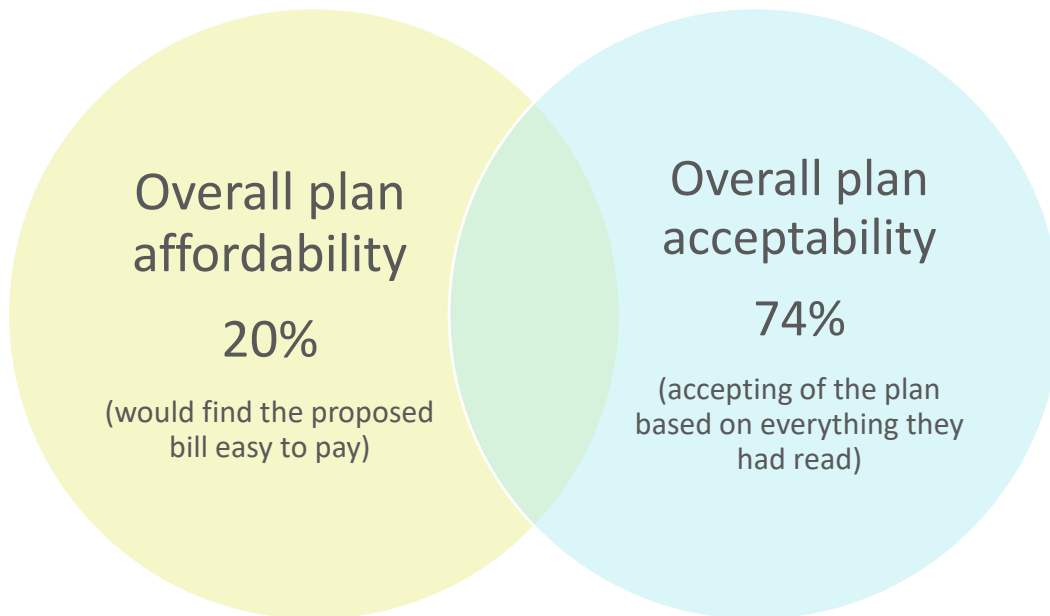
The survey was tailored for both Household and Non-Household customers and the following volumes were achieved:

Customer segment	Total number of surveys (after data cleaning)
Northumbrian Water Household bill payers	1043
Northumbrian Water Non-Household bill payers	204
Essex & Suffolk Water Household bill payers	1055
Essex & Suffolk Water Non-Household bill payers	198

## Summary of results

### Overall headlines

Overall affordability and acceptability of the NW/ESW proposed business plan for 2025 to 2030 is summarised in the graphic below. Respondents judged the bill impact of the proposed plan first, and an overall affordability score of 20% was achieved. Respondents were then introduced aspects of the plan around service levels and enhancements and asked to consider their acceptance of the plan, taking all aspects into account. An overall acceptability score of 74% was achieved.



### Current financial status

There was evidence of particular affordability concerns amongst ESW Household customers with 65% agreeing that they sometimes struggle to pay one of their household bills compared to an overall result of 37%. Similar patterns emerged when respondents were asked how well they were managing financially. 70% of ESW Household respondents stated that they were 'just about getting by' compared to an overall average of 44%.

ESW household respondents were also most likely to be pessimistic about their future with 58% expecting their finances to get a lot worse up to 2030 compared to an overall result of 26%. Responses amongst NW household respondents were fairly mixed, however those who received financial support, living in the most deprived areas based on Index of Multiple Deprivation (IMD) and those on lower incomes were most pessimistic about their financial future. Non-Household customers in both regions

showed greater levels of optimism with around half of each expecting their financial situation to get a little or a lot better in future years.

### Current and future bills and affordability

Generally, respondents did not find their current water (and wastewater) bill difficult to pay with 46% finding it easy to pay, 37% saying it was neither easy nor difficult and only 15% finding it difficult. Comparatively, when presented with the proposed bill for 2025 to 2030, 46% overall stated they would find this difficult to pay, whilst 20% would find it easy and 30% neither easy or difficult. Expected difficulty to afford the proposed bills was particularly apparent amongst lower income groups, younger groups and those living in areas classed as more deprived in the Index of Multiple Deprivation (IMD).

### Acceptability

Respondents were presented with a number of proposed service levels related to common PCs and asked which was the most important. Reducing leakage and reducing pollution incidents came out particularly strongly in terms of areas that were important to customers.

Respondents were then presented with information on enhancements included in the plan. In NW, when comparing the three statutory enhancements, 'metering, water efficiency and leakage' was felt to be most important, compared to 'reducing storm overflows' and 'improving asset health'. Views were mixed between the two NW discretionary investments with around half of respondents selecting each as the most important ('reducing regional flooding' and 'resilience – climate change adaptation'). In ESW 'metering, water efficiency and leakage' also emerged as the most important enhancement out of those presented to customers, followed by 'securing water supplies.'

When asked to take everything they had read into account, overall 74% agreed that they found NW/ESW's plan acceptable. Acceptance was particularly high amongst Non-Household customers (NW Household 72%, ESW Household 70%, NW Non-Household 81%, ESW Non-Household 83%).

Those who found the plan unacceptable were asked to explain why and the most common responses across customers segments were that the bill increases were too high or that company profits are too high. Reasons for finding the plan acceptable were that customers supported what NW/ESW were trying to do in the long term and that the plans seemed to focus on the right services.

### Final conclusion

The NW/ESW plans were strongly accepted by customers overall, however affordability remains a concern particularly amongst those on lower incomes, receiving financial support already or living in

areas classified as most deprived on the IMD. This is particularly evident with ESW Household customers.

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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 above the letter 'i'. The logo is white and is set against a teal background that features a faded image of a smiling woman with long dark hair, wearing a floral patterned shirt, sitting at a table.

**“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 Limited (NWL) serves 2.1 million Households and businesses in two operating areas covered by Northumbrian Water (NW) and Essex & Suffolk Water (ESW). NW is a water and wastewater company while ESW is a water only company.

To meet the prescribed approach outlined by Ofwat and CCW, NWL is required to deliver PR24 AAT research. This report is in relation to the quantitative phase of research. This testing followed specific guidance developed by Ofwat and CCW to enable results to be compared across the industry. For consistency, this is referred to as the guidance in the report.

This Acceptability and Affordability Testing (AAT) was commissioned by NWL to cover both operating regions.

## Objectives

The research was implemented to test NW/ESW's proposed business plan with Household and Non-Household customers via a survey in order to meet the following objectives as quoted from the guidance:

- *To test the affordability and acceptability of the proposed company plan with a representative sample of Household bill payers, with an emphasis on affordability, using a statistical sample survey*
- *To test the affordability and acceptability of the proposed company plan with a sample of Non-Household customers to be surveyed*
- *Quantitative testing should be undertaken using companies' proposed business plans that have taken account of the qualitative research findings. As such, only one version of the plan should be tested.*



## Survey development

### Cognitive testing

The survey underwent two rounds of cognitive testing before it was finalised. Each round of cognitive tests consisted of five interviews conducted via Teams. The first round of cognitive testing focussed on the presentation of comparative information, given there was some debate in the industry at the time around the best way to present this. The second round of testing examined the decision making process when deciding if the plan was affordable and acceptable. For the acceptability question it was assured that decisions about the acceptability of the plan were based on both the bill increase shown as well as the investments and service levels that would be delivered.

### Role of the ICG

The survey was developed in partnership with the NWL Customer Engagement Panel (CEP), a sub group of the company's Independent Challenge Group. The CEP played a key role in the assurance process of the survey development. The CEP were involved in at least weekly meetings with Explain and NWG project teams to discuss project progress and review and agree key details. The CEP reviewed and fed into survey development at the following stages:

- Prior to survey development: the guidance was discussed and the level of contextual information required was agreed
- Prior to cognitive testing: once the survey was scripted the CEP reviewed and provided feedback
- Post cognitive testing: once the survey had been cognitively testing the results of this exercise were shared with the CEP along with the actions taken as a result

The CEP provided invaluable feedback to ensure the survey design continued to meet guidance, but avoided cognitive difficulty for respondents.



## Questionnaire

The majority of the survey scripting is stipulated within the guidance. However, in the 'Affordability and Acceptability queries and responses' documents it is clarified that additional contextual information about the plan should be included. It is clear that this contextual information should support the prescribed text, and not expand its coverage beyond what is necessary for meaningful understanding, using text that is already available in the guidance where possible.

The guidance has been strictly adhered to except in circumstances where there was a strong degree of challenge from cognitive testing or the NWL CEP or where specific difficulties were encountered despite best endeavours to follow the guidance. The table that follows highlights these instances.



Survey section	Adherence to guidance and additional contextual information
Survey introduction	There was no survey introduction included in the guidance. A short introduction was drafted to adhere with GDPR and Market Research Society requirements around data security and prize draws.
Screener: Household	These were included as per the guidance. Following conversation with the CEP it was agreed that screening out respondents who are unwilling to provide their age was unnecessary and likely to result in complaints. This question was therefore adapted to collect respondent age in bands, and there was no screen out if the respondent refused to provide this information.
Screener: Non-Household	<p>This was included as per the guidance. The Ofwat Non-Household Customer Insight Survey BMG Final Report 2020 was used to develop a series of screening questions to ensure respondents were eligible to participate. These included:</p> <ul style="list-style-type: none"> <li>- Verifying the respondent was solely or jointly responsible as the decision maker for their organisation’s water and sewerage service at any of its premises</li> <li>- Verifying that the business has its own premises (and not just out of a home or vehicle)</li> <li>- Verifying that the respondent had a business premise in the NW/ESW region</li> </ul>
Affordability	<p>Q1 to Q4 were asked as per the guidance.</p> <p>After these questions, some additional contextual information was added. The cognitive interviews demonstrated that early in the survey respondents did not have sufficient understanding that the purpose of the research was to test NWL’s business plan. In addition, respondents did not understand that the business plan would impact their bill as well as deliver a series of investments. The following text was therefore discussed and agreed with the CEP for inclusion:</p> <p><i>We are now going to show you some information about your water company’s business plan. Water companies are required to develop business plans every five years. The plan we are showing you is for 2025-2030.</i></p> <p><i>There are two main parts of the plan for you to think about:</i></p>



	<ol style="list-style-type: none"><li>1. <i>Cost: how the business plan investments and inflation will increase your personal water and sewerage bill and whether this is affordable for you</i></li><li>2. <i>Service: more detail on the levels of service Northumbrian Water will deliver between 2025 and 2030 and what is most important to you</i></li></ol> <p><i>After you have reviewed this information, we will ask you how acceptable you find the plan overall.</i></p> <p>Respondents were then presented with the text from the guidance related to Q5. Two additions were made to this text based on feedback from cognitive interviews:</p> <ol style="list-style-type: none"><li>1. Respondents questioned who Ofwat is. A hover over description of the regulator was therefore added</li><li>2. Respondents focussed on the inflationary increases on the graph, and misunderstood that part of the bill increase was related to the proposed plan and the investments NW/ESW were proposing to make. The final paragraph from the guidance was therefore slightly adapted as follows:<ol style="list-style-type: none"><li>a. <i>Guidance text: The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years</i></li><li>b. <i>Survey text: The proposed bill you can see in the graph below is for 2025 to 2030 – <b>these are the orange parts</b>. The graph also shows the proposed amounts to cover the investment in water and sewerage services needed over the next few years – <b>these are the blue parts and increase each year</b>.</i></li></ol></li></ol> <p>Following this each respondent reviewed a bar chart to understand their personal bill impact, this was developed as per the guidance.</p> <p>Questions 5 and 6 were asked to respondents as per the guidance.</p>
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Acceptability	<p>In this section there was less specific guidance about the stimulus information that was to be presented on the proposed plan. Therefore, NWL and Explain worked closely with the CEP, using feedback from the qualitative research and cognitive interviews to agree contextual information to be included. Ensuring this was balanced and provided to aid understanding.</p> <p>Firstly in this section respondents were introduced to the a number of common performance commitments (PCs), three water PCs shown in both NW and ESW and three wastewater PCs shown in NW only:</p> <ol style="list-style-type: none"><li>1. Water supply interruptions</li><li>2. Leakages</li><li>3. Water quality contacts</li><li>4. Internal sewer flooding</li><li>5. External sewer flooding</li><li>6. Pollution incidents</li></ol> <p>Prior to this section it was agreed that further contextual information was required. The following paragraph was therefore included to help guide respondents through the survey:</p> <p><i>Thank you. We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025 - 2030.</i></p> <p><i>Northumbrian Water's business plan is made up of a number of different areas of performance. We are going to share these areas with you now in blocks of three.</i></p> <p><i>The first three areas of performance are related to your water services.</i></p>
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	<p>Following this respondents reviewed a single page of information for each performance commitment. The three water PCs were presented in one block, and in NW the three wastewater PCs were presented in another block.</p> <p>On the page for each PC the guidance was adhered to in terms of how to present comparative information. In cognitive testing some respondents were looking for some more information to describe each PC and therefore a hover over was included using text from the guidance to describe each one.</p> <p>After viewing the comparative performance information, respondents were presented with a statement to demonstrate the proposed service level that NW/ESW will deliver in the PR24 plan. For example: <i>Northumbrian Water plans to reduce the length of time properties are without water to an average of 4 minutes 3 seconds by 2030.</i> This format was chosen through deliberation with the CEP who strongly felt that including a graph or any visual to show forecasted performance for each PC was unnecessary and would result in information overload for respondents.</p> <p>Before respondents were shown the block of three wastewater PCs they were also provided with the following sentence to help guide them through the survey: <i>The next three areas of performance are related to your wastewater services.</i></p> <p>Respondents then viewed a set of enhancements from the proposed plan based on those that had been included in the qualitative research and had the most significant impact on customer bills.</p> <p>It was clear in the guidance that statutory and discretionary enhancements should be clearly outlined in the survey and so for NW the three statutory enhancements and two discretionary enhancements were presented in separate blocks. For ESW there were three statutory enhancements and one discretionary enhancement and so these were presented in one block but with clear labelling regarding whether the enhancement was statutory. Before respondents viewed the block of statutory enhancements they reviewed the following contextual information to explain this and again assist with guiding the respondent through the survey.</p>
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	<p><i>The proposed plan also includes additional investments to meet statutory obligations (the law). These investments contribute to the bill increase you have seen for 2025 to 2030.</i></p> <p><i>There are three statutory investments to show you in total.</i></p> <p><i>You can click under each one to learn more.</i></p> <p>Before respondents reviewed the block of discretionary investments they viewed the following contextual information.</p> <p><i>There are two additional investments that Northumbrian Water are not required by law to make, but they are proposing them because they address risks and improve service for customers.</i></p> <p><i>We show you these investments in the next section.</i></p> <p>For each enhancement respondents were presented with a simple table to provide a short explanation as to what the investment would involve. Following this respondents were able to hover over to learn more about the enhancement and how it would be achieved. The wording for descriptions was replicated from the qualitative research. In the case of storm overflows, wording from the guidance was used to describe this enhancement. An example of the tables used is shown below.</p>
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	<div data-bbox="696 293 1608 432" style="background-color: #0056b3; color: white; padding: 10px;">  <h2 style="margin: 0;">Storm overflows</h2> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td data-bbox="696 432 1093 531" style="width: 30%; padding: 10px;"> <p>Is this investment statutory?</p> </td> <td data-bbox="1093 432 1608 531" style="width: 70%; padding: 10px; text-align: center;">  </td> </tr> <tr> <td data-bbox="696 531 1093 1337" style="width: 30%; padding: 10px;"> <p>What does this investment involve?</p> </td> <td data-bbox="1093 531 1608 1337" style="width: 70%; padding: 10px;"> <p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p> </td> </tr> </table>	<p>Is this investment statutory?</p>		<p>What does this investment involve?</p>	<p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p>
<p>Is this investment statutory?</p>					
<p>What does this investment involve?</p>	<p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p>				



	<p>In line with the guidance, respondents were asked Q7 to determine which part of each block of PCs or enhancements was most important to them.</p> <p>Finally in this section respondents were asked Q8, Q8a, Q8b and Q9 in line with the guidance.</p>
Household demographics	All questions were asked in line with the guidance.
Non-Household demographics	All questions were asked in line with the guidance.
Prescribed content at the end of each survey	Respondents were presented with the link to information about NW/ESW’s financial support at the end of the survey in line with the guidance.



## Treatment of company specific social tariff schemes

In order to ensure that the research measured whole bill impact, social tariff research was conducted prior to the Affordability and Acceptability Testing. The research identified support for a higher level of social tariff contribution from benefactors and thus this was included in the bill that was shown in the research for all customers not currently in receipt of the social tariff. As there are no proposed changes to social tariff discount levels during PR24 no adjustments were made to the bills of social tariffs recipients. No explanatory statements in regards to the social tariff were included as per the guidance.

## Treatment of inflation

As noted in the table above inflation information was presented as per the guidance.

The full survey can be found in Appendices 1 to 4.



## Sample design

### Sampling where customers have different service providers

In developing the sampling frame for the research, the other service providers that overlap with NW/ESW regions were considered.

In Northumbrian Water the majority of customers are combined water and wastewater customers. There is a small population of customers in Hartlepool for whom Northumbrian Water provide wastewater services only. However, as this group account for less than 10% of the Northumbrian Water consumer base they were excluded from the survey.

In Essex & Suffolk Water wastewater services are provided by Thames Water or Anglian Water. As NWL, Thames Water and Anglian Water are all WaSCs there is no obligation for any company to share information regarding their respective business plans and joint procurement was not feasible. Therefore, ESW customers were presented with the water business plan only. However, in the affordability section of the survey respondents were provided with information regarding how the average Thames or Anglian Water bill will change by 2030 so they were able to consider this in their decision making.

### Sampling requirements for Household customers

The guidance stipulates that a minimum of 500 Household surveys should be collected. The following numbers of survey completes were obtained by NWL. These increased sample sizes for Household customers particularly were felt to be required given the large customer base served by NWL and to enable reliable cross-tabulation analysis by important factors such as Index of Multiple Deprivation.

Customer segment	Total number of surveys (after data cleaning)
Northumbrian Water Household bill payers	1043
Essex & Suffolk Water Household bill payers	1055

In line with the guidance, for Household customers the NWL domestic customer database was used as the sampling frame. Exclusions were kept to a minimum. Customers with a null bill or a bill that was inexplicably high were excluded to ensure they were not presented with an inaccurate bill amount in the survey. Customers with multiple bills in the same property were excluded given that this would cause complexities within the survey.



The sampling frame was designed to ensure the drawn sample was a good reflection of the NW and ESW customer base. It was selected to include a good sample of those eligible for and/or on the Priority Services Register, eligible for and/or on financial support tariffs, and people with other health vulnerabilities (e.g. high water use for medical reasons). In order to ensure inclusivity of customers with low incomes or those just about managing, in line with the guidance, areas of higher deprivation were intentionally proportionally higher in the sample than the population as follows:

- 25% from the bottom IMD quintile postcodes for that area (ie most deprived)
- 22% from the second quintile
- 20% from the third quintile
- 18% from the fourth quintile
- 15% from the fifth quintile (ie least deprived)

The dataset also included the following metadata to support in assessing that the sample drawn was a good reflection of the NW and ESW customer bases.

- Age
- Services received – water, wastewater or both
- Current full bill amount
- Any financial support received
- Any non-financial support received - health vulnerabilities
- Acorn category
- Metered or unmetered
- Experience of a rare but particular type of service failure (eg sewer flooding)



## Sampling requirements for Non-Household customers

The guidance stipulates that a minimum of 200 Non-Household surveys should be collected. The following numbers of survey completes were obtained by NWL, in line with these targets.

Customer segment	Total number of surveys (after data cleaning)
Northumbrian Water Non-Household bill payers	204
Essex & Suffolk Water Non-Household bill payers	198

A data collection mode was not prescribed for Non-Household customers. A mixed approach was adopted using a push to web approach using a purchased database, alongside responses collected via a research panel.

## Data collection method (Household)

In line with the guidance a push-to-web approach was used. Each sampled Household was contacted with an initial email. In cases where an email address was not held a letter was sent instead. 56% of NW customers and 62% of ESW customers received a letter with the remainder receiving an email invite. The initial email/letter explained the purpose of the survey and how the questionnaire could be accessed and completed online. Customers were able to request a postal copy of the survey in the post. The opportunity to request the survey in an alternative language or format was also provided including completing the survey face to face or via the telephone. In total 116 postal surveys were requested and 80 were returned. No interviews were requested in alternative formats, via telephone or face to face.

In advance of the fieldwork, it was agreed with the CEP that reminder emails or letters would not be pragmatic given the challenging timescale. However, as target sample sizes were achieved from the initial mailings, top up mailings were not required. The table below shows the numbers of email and postal survey invitations sent and the overall response rates.

Region	Number of invites sent	Number of completed surveys (after data cleaning)	Response rate
NW	18,847	1043	5.5%
ESW	16,705	1055	6.3%



## Incentives

All Household respondents and those Non-Household respondents who were contacted via a purchased database (rather than via panel) were offered a £10 incentive for having completed the survey. It was agreed with the CEP that offering a £5 incentive to some customers and a £10 incentive to others could result in customers feeling disgruntled if they received the lower survey amount and so £10 was agreed across the board.

## Recruitment material

As the push to web approach relies on the initial communication to take part in the survey, efforts were made to ensure this was inclusive, engaging and accessible. CEP also provided their input in terms of the content of this. The final version can be found in Appendix 5.

# Outputs and deliverables

## Data tables

In line with the guidance a full set of data tables have been provided separately to this report. These tables analyse each question in the questionnaire by a range of factors including:

### Household

- Age
- Financial support
- Acorn category
- Metering
- Region
- IMD Quintile
- Gender
- Vulnerability
- Household income





- PSR

#### **Non-Household**

- Main use of water within organisation
- Number of sites organisation operates in
- Number of employees
- Core activity of organisation

Overall results are shown in the report. These are based on a weighted average in line with the methodology used for Ofwat data tables. Household and non-household customers are weighted based on total consumption. Then NW and ESW customers are weighted based on number of customers

Don't know and missing responses are included in tables, and they are provided in unweighted and weighted forms.

As the sample was random, weighting was applied to compensate for differential levels of responses. On review of the final sample, the data was agreed to be weighted as follows:

- Gender: The CEP felt this was an important demographic
- Age: The CEP felt this was an important demographic
- Index of Multiple Deprivation: As listed in guidance
- Geographical area: As listed in guidance

Other factors such as meter status were considered however the achieved sample was representative of the wider population in this area.

## Data cleaning

CCW and Ofwat issued guidance around the removal of speeders and this guidance was followed. For each of the four surveys (NW Household, NW Non-Household, ESW Household, ESW Non-Household) the median completion time was identified and any surveys that were completed in less than a third of this time were removed.



At the start of the NW Household fieldwork a bug was identified in the personalised bill and this was not presented correctly to respondents. These surveys were also therefore removed from the sample.



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 square icon containing a document symbol to its right. The logo is white and set against a teal background.

explain

A woman with long, light-colored hair is smiling and looking slightly to the right. She is wearing a patterned, short-sleeved top. Her hands are clasped in front of her. The background is a soft, out-of-focus indoor setting. The entire image is overlaid with a semi-transparent teal filter.

**“The best vision is  
insight”**

## **Respondent profile**

An overview of the profile of respondents who participated in the research.

# Respondent profile

## Non-Household

Given the difficulties associated with engaging Non-Household customers in research the sample was obtained via natural fallout. However, as shown in the tables that follow a variety of Non-Households took part in the survey with variation by size and activity.

	NW	ESW
<b>Main use of water</b>		
For the manufacturing process which is essential to the running of your organisation	21%	17%
For the supply of services your organisation provides	30%	36%
For an ingredient or part of the product or service your organisation provides	21%	25%
For normal domestic use for your organisation's customers and employees	69%	68%
None of the above	3%	1%
Don't Know	3%	1%
<b>Number of sites operated from</b>		
1	38%	37%
2	11%	16%
3	11%	12%
4	5%	7%
5 to 10	10%	11%
11 to 50	11%	9%
51 to 250	5%	4%
250+	4%	3%
Prefer not to say	4%	2%
<b>Number of employees</b>		
0 (sole trader)	8%	7%
1 to 9 employees (micro)	14%	17%
10 to 49 employees (small)	21%	20%
50 to 249 employees (medium)	23%	27%
250+ employees (large)	31%	28%
Prefer not to say	3%	1%
<b>Core activity</b>		
Agriculture, forestry and fishing	2%	2%
Mining and quarrying	1%	1%
Energy or water service & supply	2%	4%
Manufacturing	13%	12%
Construction	8%	9%
Transport and storage	4%	4%
Hotels & catering	6%	5%
IT and Communication	10%	15%



Finance and insurance activities	3%	7%
Real estate activities	-	2%
Professional, scientific and technical activities	3%	6%
Administrative and Support Service activities	3%	1%
Public administration and defence	3%	3%
Education	6%	8%
Human health and social work activities	10%	10%
Arts, entertainment and recreation	4%	2%
Other service activities	9%	4%
Other (Please specify)	9%	5%
Prefer not to say	4%	3%

## Household

The tables below show the unweighted and weighted demographic breakdown of Household customers who took part in the survey. As a random sampling methodology was used, weighting has been applied to ensure the sample is representative of the NW and ESW customer bases.

	NW unweighted	NW weighted	ESW unweighted	ESW weighted
<b>Age</b>				
16-25	1%	2%	1%	2%
26-35	6%	12%	8%	11%
36-45	13%	16%	14%	16%
46-55	17%	17%	16%	17%
56-65	24%	18%	23%	18%
66-85	31%	25%	28%	25%
86+	1%	4%	1%	4%
Prefer not to say	8%	6%	8%	7%
<b>Financial support</b>				
No financial support	96%	95%	96%	96%
Has financial support	4%	5%	4%	4%
<b>Acorn category</b>				
1.A Lavish Lifestyles	0%	0%	1%	1%
1.B Executive Wealth	13%	12%	11%	9%
1.C Mature Money	15%	13%	12%	9%
2.D City Sophisticates	0%	0%	1%	1%
2.E Career Climbers	3%	3%	6%	7%
3.F Countryside Communities	5%	5%	5%	4%
3.G Successful Suburbs	7%	6%	8%	8%
3.H Steady Neighbourhoods	10%	9%	15%	15%
3.I Comfortable Seniors	7%	6%	4%	3%
3.J Starting Out	4%	5%	4%	5%
4.K Student Life	1%	1%	1%	2%
4.L Modest Means	10%	11%	8%	8%
4.M Striving Families	7%	8%	9%	10%



4.N Poorer Families	5%	6%	2%	2%
5.O Young Hardship	5%	6%	4%	5%
5.P Struggling Estates	4%	5%	5%	7%
5.Q Difficult Circumstances	4%	5%	4%	5%
6.R Not Private Households	0%	0%	0%	0%
<b>Water meter</b>				
Metered	48%	47%	68%	66%
Unmetered	52%	53%	32%	34%
<b>Area</b>				
Essex			71%	83%
Suffolk			29%	17%
Thames Water			22%	27%
Anglian Water			78%	73%
Northumberland & Tyne	32%	32%		
Tees	32%	37%		
Wear	36%	31%		
<b>Sewage failure</b>				
Yes	4%	5%		
No	96%	95%		
<b>Water failure</b>				
Yes	12%	13%	7%	7%
No	88%	87%	93%	93%
<b>IMD Quintile</b>				
1	17%	24%	20%	24%
2	20%	22%	18%	22%
3	23%	19%	22%	19%
4	20%	18%	20%	18%
5	20%	17%	20%	17%
<b>Gender</b>				
Female	46%	50%	45%	50%
Male	52%	48%	53%	48%
I identify in another way	0%	0%	0%	0%
Prefer not to say	1%	1%	2%	2%
<b>Vulnerable customer</b>				
Any vulnerable	40%	41%	41%	43%
Not vulnerable	60%	60%	59%	57%
<b>Household income</b>				
Up to £10,399 a year	6%	7%	6%	8%
£10,400 to £15,599 a year	12%	12%	11%	12%
£15,600 to £25,999 a year	18%	18%	16%	14%
£26,000 to £36,399 a year	14%	15%	12%	11%
£36,400 to £51,999 a year	12%	12%	12%	13%
£52,000 to £72,799 a year	7%	7%	7%	8%
£72,800 to £103,999 a year	4%	4%	3%	3%
£104,000 and above a year	2%	1%	3%	3%







explain

**“The goal is to transform  
data into information,  
and information into  
insight”**

## **Results**

An in-depth review of the findings of the research programme.

# Results

## Affordability

Following the survey introduction and profiling questions, respondents completed the affordability section of the survey. Initially in this section respondents were asked a series of questions about their current financial situation.

The first affordability question was as follows:

**Q1. Thinking about your Household's/organisation's finances over the last year, how often, if at all, have you/your organisation struggled to pay at least one of your Household/its bills?**

Combined results for this question inclusive of Household and Non-Household customers across NW and ESW are summarised below.

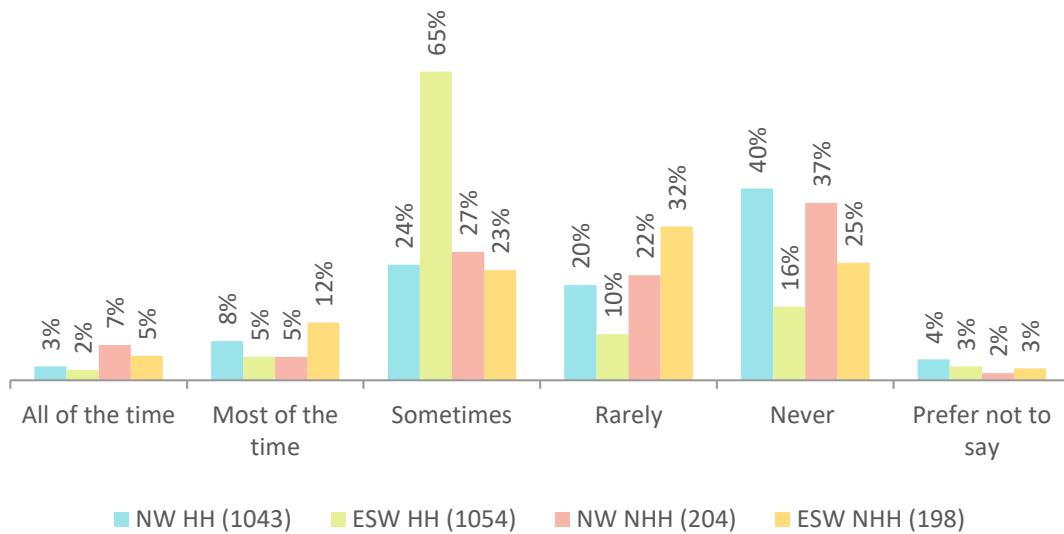
Survey response	Percentage
All of the time	3%
Most of the time	7%
Sometimes	37%
Rarely	18%
Never	31%
Prefer not to say	3%





The graph below shows the breakdown of responses between NW and ESW Household and Non-Household customers. Responses were fairly mixed, however 65% of ESW HH customers sometimes struggled to pay at least one of their bills.

**Q1. Thinking about your Household's/organisation's finances over the last year, how often, if at all, have you/your organisation struggled to pay at least one of your Household/its bills?**



Cross-tabulation analysis has been conducted on this question to identify statistically significant differences in responses by various demographic factors. All significant demographic differences are summarised below.

**NW younger respondents more likely to struggle to pay their bills.**

(Struggling most of the time or sometimes: 16-25: 47%, 26-35: 41%, 36-45: 36%, 46-55: 45%, 56-65: 28%, 65-85: 23%, 86+: 7%).

**NW respondents receiving financial support more likely to struggle to pay their bills than those not receiving financial support.**

(Struggling all of the time or most of the time: no financial support: 9%, vs has financial support: 52%).

**NW IMD 4 and 5 (least deprived) least likely to struggle.**

(Never struggle: IMD 5: 50%, IMD 4: 49% vs IMD 1: 31%, IMD 2: 36%).

**NW female respondents more likely to struggle than male respondents.**

(Struggling most of the times or sometimes: female: 40%, male 25%).

**NW respondents with higher income less likely to struggle.**

(Never struggle: £104,000: 63%, £72,800 to £103,999: 75% vs up to £10,400: 14%, £10,400 to £15,599: 29%, £15,600 to £25,999: 37%).

**ESW male respondents less likely to struggle than female respondents.**

(Never struggle: male: 19% vs female 12%).

**ESW respondents with higher income less likely to struggle.**

(Never struggle: £104,000: 45%, ££72,800 to £103,999: 27% vs up to £10,400: 4%, £10,400 to £15,599: 8%).



Next in the affordability section respondents were asked how well they were managing financially now:

**Q2. Overall, how well would you say you are/your organisation is managing financially now?**

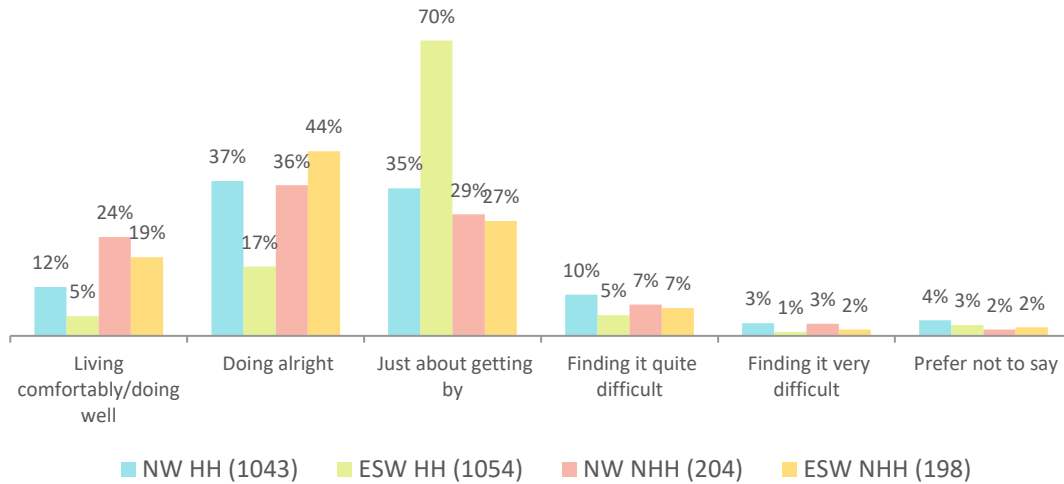
Overall results, combining NW and ESW Household and Non-Household customers are shown below.

Survey response	Percentage
Living comfortably/doing well	12%
Doing alright	31%
Just about getting by	44%
Finding it quite difficult	8%
Finding it very difficult	2%
Prefer not to say	3%



Again ESW Household respondents were more likely to report financial difficulties with 70% stating they were ‘just about getting by’, whilst the majority of Northumbrian Water Household respondents, and Non-Household respondent from both regions, said they were ‘doing alright’ or ‘living comfortably/doing well’.

**Q2. Overall, how well would you say you are/your organisation is managing financially now?**



The cross-tabulation analysis for this question revealed the following.

**NW respondents receiving financial support more likely to be finding it difficult than those not receiving financial support.**

(Finding it quite or very difficult: no financial support: 11%, vs has financial support: 40%).

**NW respondents from Tees or Wear more likely to be living comfortably than those from Northumberland & Tyne.**

(Tees: 14%, Wear: 13% vs Northumberland & Tyne: 8%).

**NW respondents from IMD 4 or 5 (least deprived) most likely to be living comfortably.**

(IMD 5: 20%, IMD 4: 18% vs IMD 3: 10%, IMD 2: 8%, IMD 1: 6%).

**NW respondents on lowest income most likely to be finding it difficult.**

(Finding it quite or very difficult: income up to £10,400: 38% vs £10,400 to £15,599: 14%, £15,600 to £25,999: 15%, £26,000 to £36,399: 7.3%, £36,400 to £51,999: 9.4%, £52,000 to £72,799: 13%, £72,800 to £103,999: 2%).

**ESW respondents on highest income most likely to be living comfortably.**

(Income of £104,000 and above: 23% vs up to £10,400 4%, £10,400 to £15,599: 1%, £15,600 to £25,999: 6%, £26,000 to £36,399: 4%, £36,400 to £51,999: 5%, £52,000 to £72,799: 6%, £72,800 to £103,999: 3%).



Respondents were then asked to reflect on their future financial situation as follows.

**Q3. Thinking about your Household's/organisation's financial situation over the next few years up to 2030, do you expect it to get: (a lot worse, a bit worse, stay the same, a bit better, a lot better)**

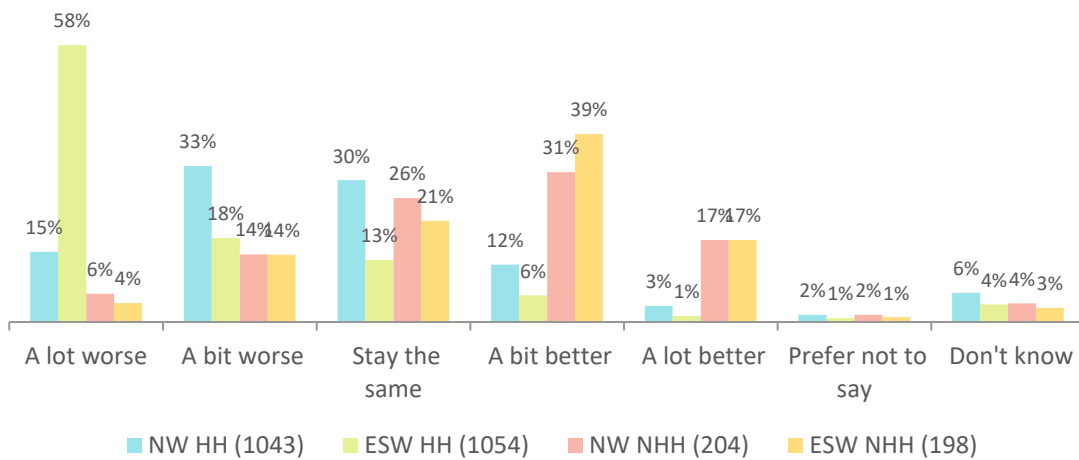
Looking at combined results for NW and ESW Household and Non-Household customers, the following results were achieved.

Survey response	Percentage
A lot worse	26%
A bit worse	24%
Stay the same	24%
A bit better	15%
A lot better	5%
Prefer not to say	2%
Don't know	5%



Essex & Suffolk Water Household respondents were most pessimistic about future finances, with 58% expecting their financial situation to get a lot worse over the next few years. Northumbrian Water Household respondents tended to think their financial situation would get either a bit worse (33%) or stay the same (30%).

**Q3. Thinking about your Household's/organisation's financial situation over the next few years up to 2030, do you expect it to get:**



Cross-tabulation analysis of this question revealed a smaller number of significant differences. All significant differences identified were in the NW region.

**NW respondents who received financial support were more likely to think their financial situation was going to get a lot worse, compared with those who don't receive financial support.**

(Has financial support: 26% vs no financial support: 14%).

**NW respondents from the most deprived areas were more likely to think their financial circumstances were going to improve.**

(A lot or a bit better: IMD 1: 20% vs IMD 2: 13%, IMD 3: 17%, IMD 4: 13%, IMD 5: 13%).

**NW respondents on lower incomes were more likely to think their financial situation would get a lot worse in the future.**

(up to £10,400: 28%, £10,400 to £15,599: 19% vs £15,600 to £25,999: 14%, £26,000 to £36,399: 8%, £36,400 to £51,999: 6%).





At this point in the affordability section, respondents were asked about the affordability of their current NW/ESW bill. For Household respondents this information was seeded into the survey using NWL customer data. For Non-Household respondents, they were asked if they knew how much their NW/ESW bill was.

All respondents were then asked about the affordability of their water (and sewerage) bill as follows.

**Q4. How easy or difficult is it for you/your company/organisation to afford to pay your current water (and sewerage) bill?**

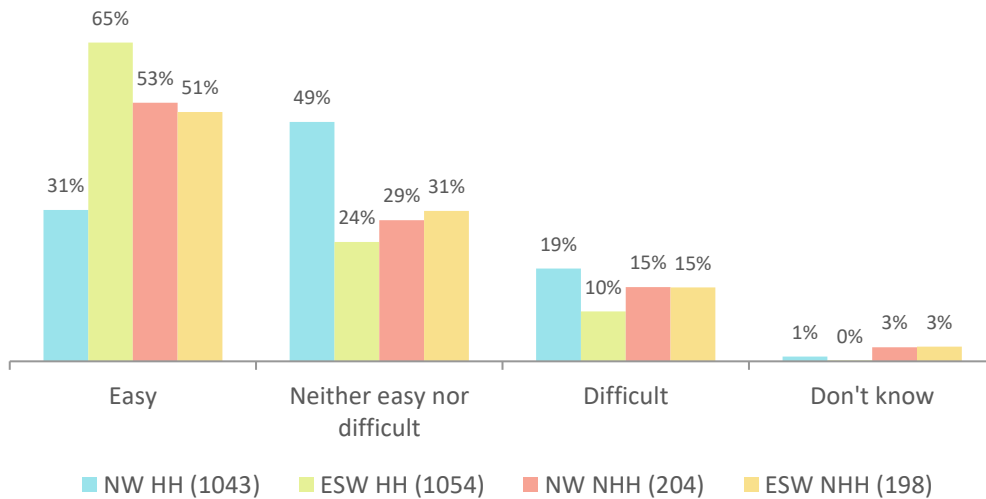
The table below shows combined results for NW and ESW Household and Non-Household customers.

Survey response	Percentage
Easy	46%
Neither easy nor difficult	37%
Difficult	15%
Prefer not to say	1%

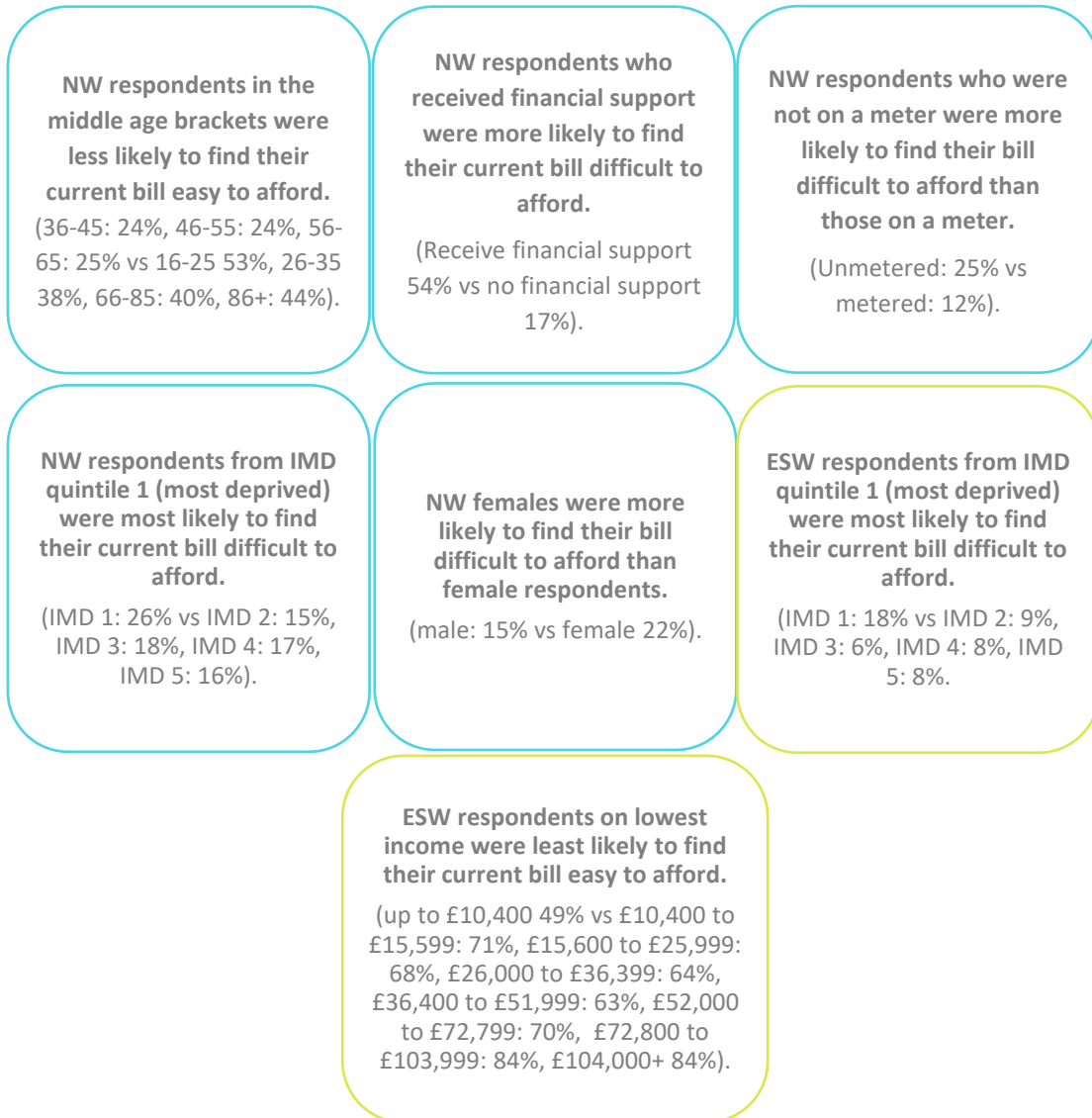


Whilst Essex & Suffolk Water respondents were most likely to be struggling to pay their Household bills in general as shown in previous questions, conversely they were most likely to find their water bill easy to afford, with 65% finding it easy compared with 31% of Northumbrian Water Household respondents. Around half of Non-Household respondents in both regions found their water (and sewerage) bill easy to afford.

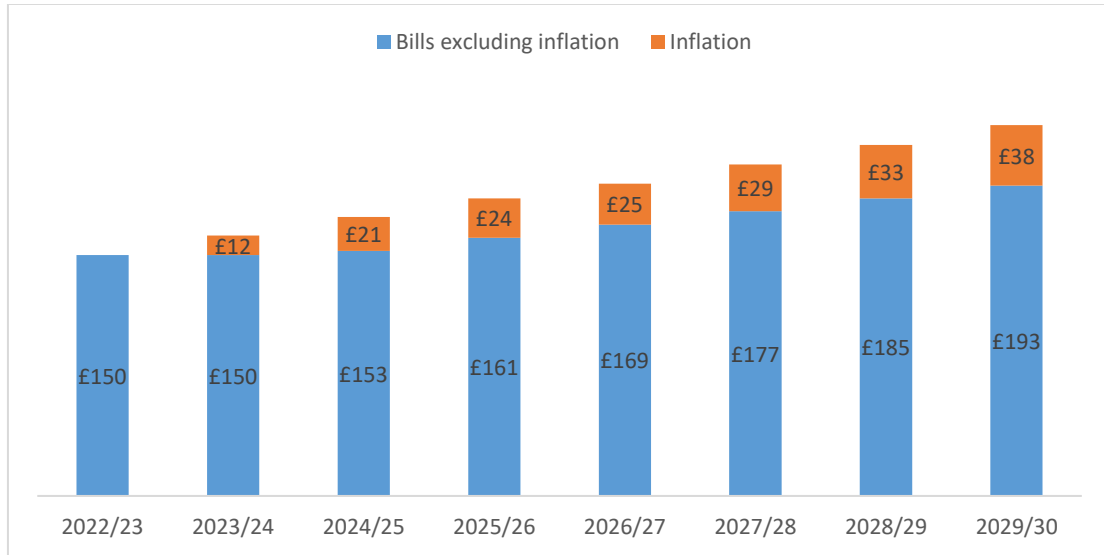
**Q4. How easy or difficult is it for you/your company/organisation to afford to pay your current water (and sewerage) bill?**



Cross-tabulation analysis for this question revealed a number of statistically significant demographic differences as shown below.



Following the information from the guidance around the business plan related investment and inflation, all respondents were shown how much their future bills would be based on the proposed plan. This information was presented in a stacked bar chart as shown below which was replicated from the guidance.



For Household customers the bill graph was calculated based on the customer's 2022/2023 bill which was seeded into the survey. Non-Household respondents who stated they were aware of their bill earlier in the survey were shown a bill graph based on percentage increases to the number they had entered. Where a Non-Household customer was not aware of their bill amount, in line with the guidance, an example bill of £1,000 was used for NW customers and £500 for ESW customers.



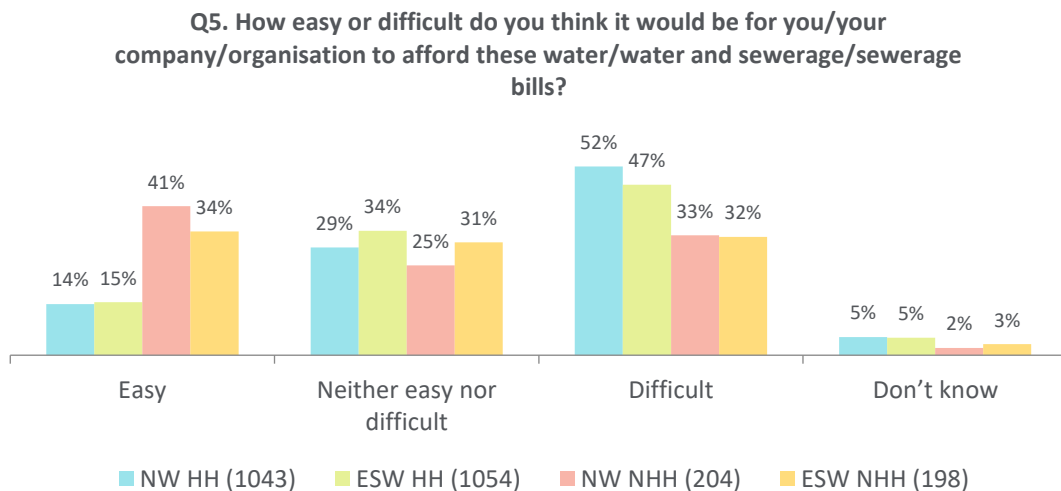
Respondents were then asked how easy or difficult it would be to afford these future bills.

**Q5. How easy or difficult do you think it would be for you/your company/organisation to afford these water/water and sewerage/sewerage bills?**

The table below shows the overall results for this question combining all respondents to the survey including NW, ESW, Household and Non-Household customers.

Survey response	Percentage
Easy	20%
Neither easy nor difficult	30%
Difficult	46%
Prefer not to say	4%

When looking at the proposed costs, responses were fairly mixed regarding affordability. Non-Household respondents were more likely to find the proposed plan affordable compared with Household respondents, with 41% of Northumbrian Water Non-Household respondents and 34% of Essex & Suffolk Water Non-Household respondents thinking it would be easy to afford, compared with 14% and 15% respectively for Household respondents. Around half of Household respondents thought it would be difficult to afford the proposed water (and wastewater) bills (52% Northumbrian Water and 47% Essex & Suffolk Water).



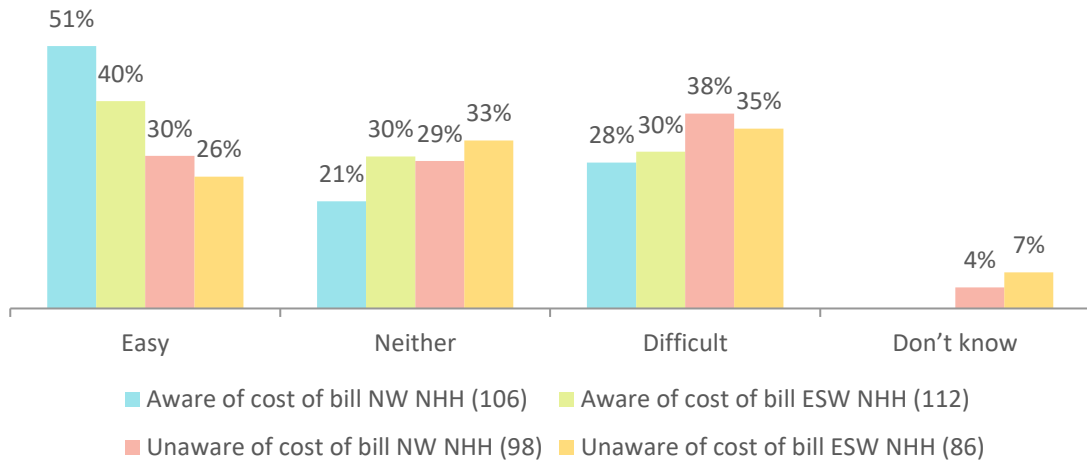
Cross-tabulation analysis on this question has identified a number of statistically significant differences between customer segments as summarised below.

<p><b>Younger NW respondents more likely to find the proposed bills difficult to afford compared with older respondents.</b>            (26-35: 63%, 36-45: 65%, 46-55 62% vs 56-65 50%, 65-85 33%, 86+ 24%).</p>	<p><b>NW respondents receiving financial support more likely to find the proposed bills difficult to afford.</b>            (No financial support: 50% vs receives financial support: 80%).</p>
<p><b>Unmetered NW respondents more likely to find proposed bills difficult than metered.</b> (Unmetered 56% vs metered 46%).</p>	<p><b>NW respondents from IMD quintile 5 (least deprived) more likely to find bills easy to afford than all other quintiles.</b>            (IMD 1: 11%, IMD 2: 13%, IMD 3: 10%, IMD 4: 14% vs IMD 5: 23%).</p>
<p><b>NW lowest income bracket more likely to find affordability difficult compared with all other income brackets.</b>            (Up to £10,400 72% vs £10,400 to £15,599: 54%, £15,600 to £25,999: 48%, £26,000 to £36,399: 43%, £36,400 to £51,999: 52%, £52,000 to £72,799: 41%, £72,800 to £103,999: 35%, £104,000+ 34%).</p>	<p><b>Younger ESW respondents more likely to find the proposed bills difficult to afford compared with older respondents.</b>            (16-25: 64%, 26-35: 64%, 36-45: 51%, 46-55: 55%, 56-65: 41%, 65-85: 30%, 86+: 53%).</p>
<p><b>ESW respondents receiving financial support more likely to find the proposed bills difficult to afford.</b>            (No financial support: 45% vs receives financial support: 72%).</p>	<p><b>ESW respondents from most deprived IMD quintiles more likely to find proposed bills difficult to afford.</b>            (IMD 1: 53%, IMD 2: 49%, IMD 3: 46%, IMD 4: 42% vs IMD 5: 40%).</p>
<p><b>ESW female respondents more likely to find the proposed bills difficult to afford than male.</b>            (Female: 51%, male: 42%).</p>	<p><b>ESW lower income bracket more likely to find affordability difficult compared with higher income brackets.</b>            (Up to £10,400 64%, £10,400 to £15,599: 54%, £15,600 to £25,999: 57%, £26,000 to £36,399: 45%, £36,400 to £51,999: 48%, £52,000 to £72,799: 34%, £72,800 to £103,999: 32%, £104,000+: 19%).</p>



Non-Household respondents who entered their own bill amount, rather than been shown the example bill of £1000 or £500 were more likely to feel that the proposed future bill was affordable.

**Q5. How easy or difficult do you think it would be for your company/organisation to afford these water/water and sewerage/sewerage bills?/How easy or difficult do you think it would be for your organisation to afford its water/water and sewerage bills?**

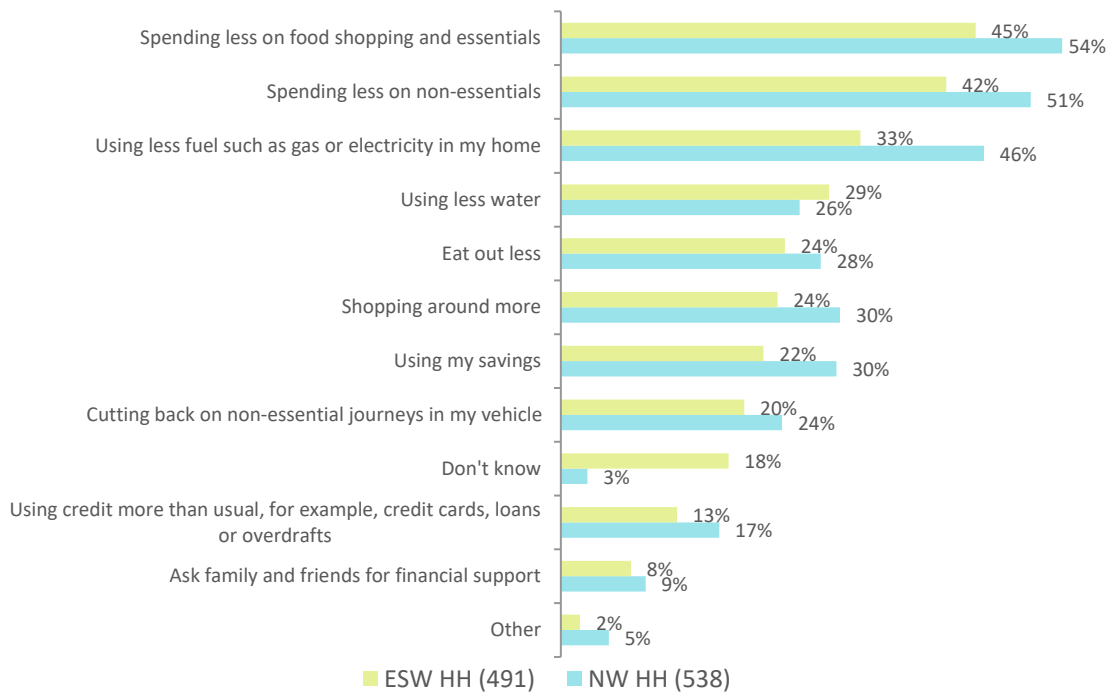


Household respondents who answered ‘neither easy nor difficult’, ‘fairly difficult’ or ‘difficult’ to the affordability of the proposed plan were asked what they would need to do to pay for the increase in their water bills between 2025 and 2030 and were presented with a list of potential responses taken from the guidance.

**Q6. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?**

Across both regions, the top responses were ‘spending less on food shopping and essentials’, ‘spending less on non-essentials’ and ‘using less fuel such as gas or electricity in my home’.

**Q6. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?**



‘Other’ options included working more (including getting a second job, working over-time and postponing retirement) moving house, working from home to reduce travel costs and equity release.

The cross-tabulation analysis overleaf identifies a range of differences in responses by customer segment.





**NW respondents receiving financial support more likely to use credit more than usual to pay for increased bills.**

(financial support: 29% vs no financial support 16%) and spend less on food shopping and essentials (financial support: 74% vs no financial support: 53%).

**NW respondents not receiving financial support more likely to spend less on non-essentials**

(no financial support: 54% vs financial support: 17%) and shop around more (no financial support: 33% vs financial support: 2%).

**NW metered respondents more likely to use less water.**

(metered: 46% vs unmetered 11%). Unmetered respondents more likely to spend less on food shopping and essentials (unmetered: 58% vs metered: 49%).

**NW IMD quintile 5**

**(least deprived) more likely than 1 and 2 to use their savings.**

(1: 23%, 2: 25% vs 5: 43%).

**NW male respondents more likely to use their savings.**

(male: 36% vs female: 24%).

**NW non-vulnerable more likely to spend less on non-essentials.**

(non-vulnerable: 55% vs vulnerable: 45%).

**ESW respondents with financial support less likely to shop around**

(financial support: 8% vs no financial support 25%) and less likely to use savings (financial support: 6%, no financial support 23%).

**ESW metered respondents more likely to use less water**

(metered: 34% vs unmetered 21%).

**ESW respondents on higher income more likely to shop around more**

(Up to £10,400 22%, £10,400 to £15,599: 19%, £15,600 to £25,999: 22%, £26,000 to £36,399: 31%, £36,400 to £51,999: 24%, £52,000 to £72,799: 20%, £72,800 to £103,999: 68%, £104,000+: 40%).



## Acceptability

Respondents then moved onto the acceptability section of the survey. In this section respondents were presented with:

- Comparative and proposed service levels for three common water performance commitments and three wastewater performance commitments in NW
- Proposed enhancements based on those that had the greatest impact on customer bills

These were presented in blocks of three where possible.

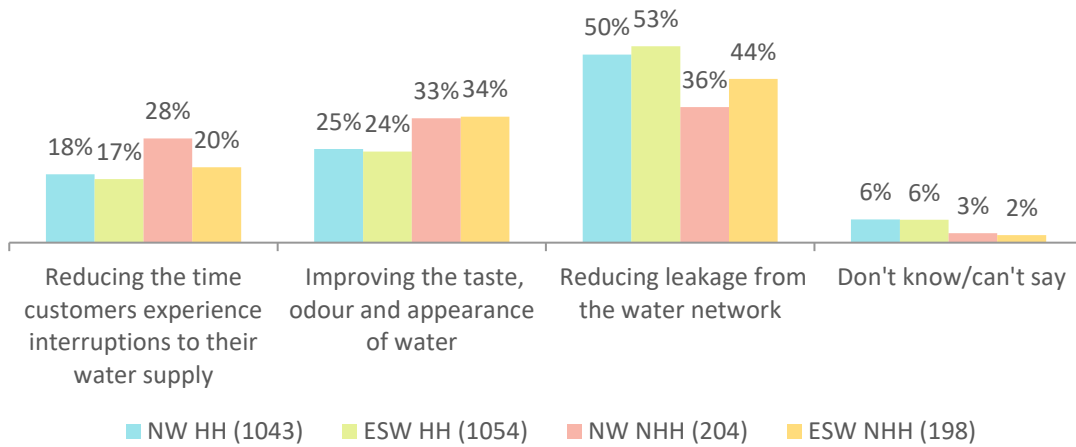
The three water performance commitments were presented in line with the guidance and included interruptions, taste, odour and appearance of water, and leakage. After reviewing these three performance commitments, respondents were asked to choose which was most important.

**Q7a. Based on what you have just read, which of these three parts of the business plan is the most important to you?**



Across all survey segments, leakage was seen to be the most important of these three parts of the plan, particularly amongst Household customers where around twice as many respondents voted for this as the most important part of the plan compared with the other two. This was followed by improving the taste, odour, and appearance of water, then interruptions which as seen as least important of the three across all groups.

**Q7a. Based on what you have just read, which of these three parts of the business plan is the most important to you?**



**Younger NW HH respondents more likely to think improving taste, odour and appearance of water most important.**

(16-25: 46%, 26-35: 46%, 36-45: 33%, 46-55: 27%, 56-65: 16%, 65-85: 17%, 86+: 15%).

**Older NW HH respondents more likely to think reducing leakage from the water network most important.**

(16-25: 28%, 26-35: 18%, 36-45: 43%, 46-55: 46%, 56-65: 64%, 65-85: 64%, 86+: 59%).

**NW HH IMD quintile 1 (most deprived) less likely to think reducing leakage from the water network most important compared to all other quintiles.**

(1: 34% vs 2: 51%, 3: 52%, 4: 61%, 5: 60%).

**NW HH IMD quintile 1 (most deprived) more likely to think improving the taste, odour and appearance of water most important compared to all other quintiles.**

(1: 35% vs 2: 26%, 3: 26%, 4: 18%, 5: 16%).

**NW HH males more likely to think reducing leakage from the water network most important**

(female: 45% vs male: 56%).

**Females more likely to think improving the taste, odour and appearance of water most important.**

(female: 28% vs male: 22%).

**ESW HH Anglian Water customers more likely to think reducing leakage from the water network most important**

(Anglian Water: 56% vs Thames Water: 42%).

**Thames Water customers more likely to think improving the taste, odour and appearance of water most important**

(Thames: 30% vs Anglian: 22%).

**Younger ESW HH respondents more likely to think improving taste, odour and appearance of water most important.**

(16-25: 39%, 26-35: 39%, 36-45: 39%, 46-55: 22%, 56-65: 20%, 65-85: 14%, 86+: 5%).

**Older ESW HH respondents more likely to think reducing leakage from the water network most important.**

(16-25: 33%, 26-35: 23%, 36-45: 39%, 46-55: 54%, 56-65: 62%, 65-85: 66%, 86+: 63%).

**ESW HH IMD quintile 1 (most deprived) and 2 less likely to think reducing leakage from the water network most important.**

(1: 46%, 2: 45%, 3: 57%, 4: 57%, 5: 62%)

**ESW HH IMD quintile 1 (most deprived) more likely to think improving the taste, odour and appearance of water most important compared to 3,4 and 5**

(1: 32% vs 3: 22%, 4: 22%, 5: 17%).

**ESW HH males more likely to think reducing leakage from the water network most important**

(female: 48% vs male: 58%).

**Females more likely to think improving the taste, odour and appearance of water most important**

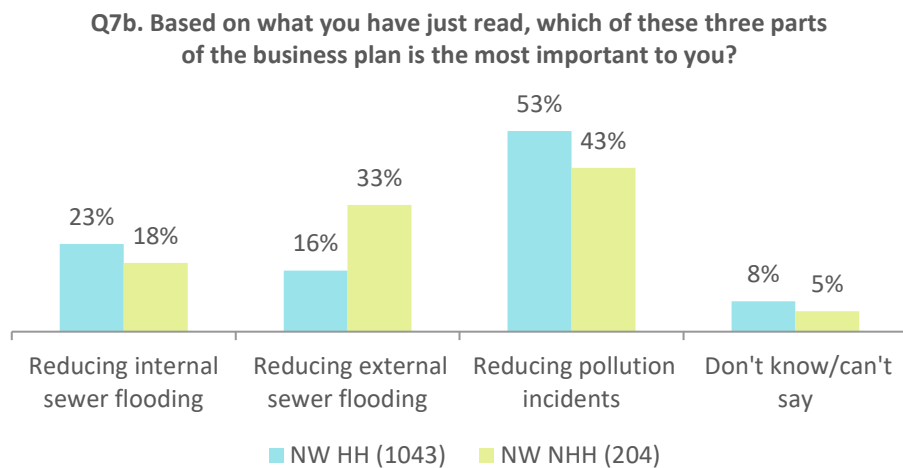
(female: 31% vs male: 18%).



Northumbrian Water Household and Non-Household customers were presented with three common wastewater performance commitments, namely: reducing internal sewer flooding, reducing external sewer flooding, and reducing pollution incidents. Again, they were asked to select which from the block of three was most important to them.

**Q7b. Based on what you have just read, which of these three parts of the business plan is the most important to you?**

For both Household and Non-Household respondents, reducing pollution incidents was thought to be most important. External sewer flooding was thought to be more important than internal sewer flooding for Non-Household respondents, however this was reversed for Household respondents.



There were two significant differences identified by customer segment in the cross-tabulation analysis as shown below.

**NW HH reducing pollution incidents less important for respondents who received financial support**  
 (no financial support: 54%, receives financial support: 38%).

**NW HH reducing internal sewer flooding most important for IMD quintile 1 (most deprived)**  
 (1: 32%, 2: 21%, 3: 16%, 4: 22%, 5: 22%)




As the enhancements are different in the NW and ESW plans the next section of the surveys differed for these customers. In Northumbrian Water they were presented with five enhancements:

- Metering, water efficiency and leakage
- Storm overflows
- Improvements to asset health
- Investment to reduce regional flooding
- Resilience – climate change adaptation


Respondents were presented with the statutory and discretionary investments in separate blocks. The three statutory investments are shown overleaf. Respondents could also hover over these tables for more information.




 **Improvements to asset health**

Is this investment statutory?	
What does this investment involve?	Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.

 **Metering, water efficiency and leakage**

Is this investment statutory?	
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.

 **Storm overflows**

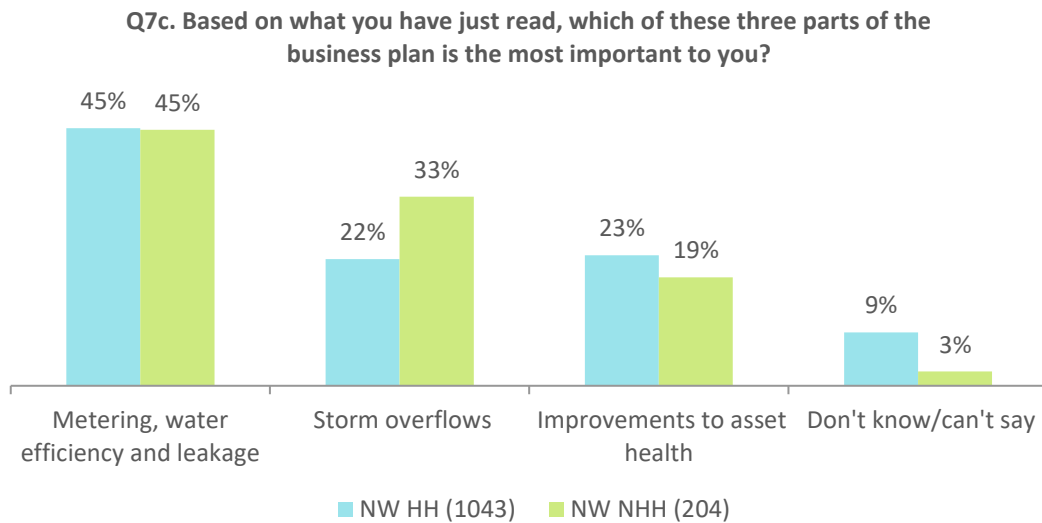
Is this investment statutory?	
What does this investment involve?	<p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>• By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>• By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p>



As in the performance commitment section of the survey, respondents were then asked which of three investments was most important to them.

**Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?**

Metering, water efficiency and leakage was seen as the most important of these three for both Household and Non-Household respondents. There was little difference between storm overflows and improvements to asset health for Household respondents, however Non-Household respondents thought storm overflows was more important than improvements to asset health.



No significant differences were identified in the cross-tabulation analysis for this question.





The two discretionary investments (‘reducing regional flooding’ and ‘resilience – climate change adaptation’) were presented to customers in a block of two. The tables used to describe these enhancements is shown below. Again, respondents could hover over the tables for more information.

 <b>Resilience - climate change adaptation</b>	
Is this investment statutory?	<input type="checkbox"/>
What does this investment involve?	Protecting water and wastewater treatment works from severe weather brought about by climate change to avoid services being interrupted.

 <b>Investment to reduce regional flooding</b>	
Is this investment statutory?	<input type="checkbox"/>
What does this investment involve?	Working with north east Local Authorities, and the Environment Agency to reduce risk of all types of flooding across the region.

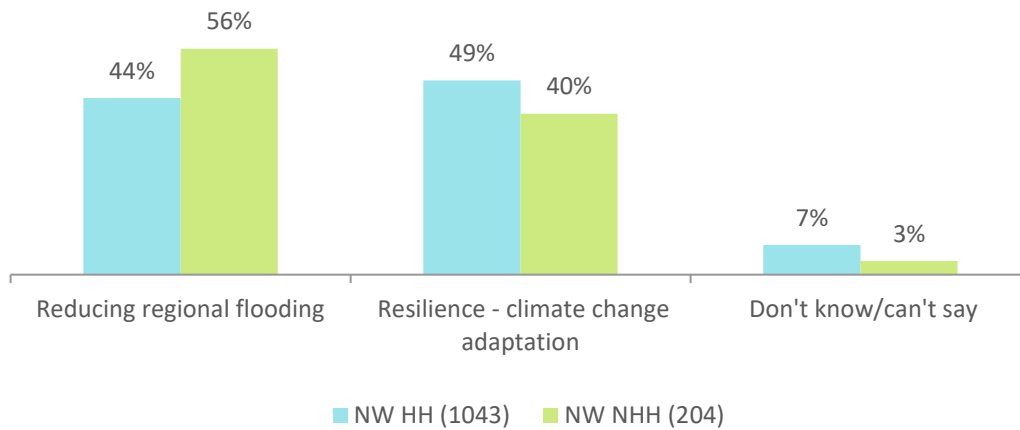
Following review of this information, respondents were asked which of the two investments was most important to them.

**Q7d. Based on what you have just read, which of these two parts of the business plan is the most important to you?**



Household respondents were evenly split in terms of which investment was most important. Non-Household respondents showed a slight majority in favour of the investment to reduce regional flooding.

**Q7d. Based on what you have just read, which of these two parts of the business plan is the most important to you?**



The following findings were identified in the cross-tabulation analysis by customer segment.

**NW HH, resilience - climate change adaptation most important for respondents not receiving financial support.**

(no financial support: 49%, receives financial support: 34%).

**NW HH, resilience - climate change adaptation most important for metered customers**

(metered: 53%, unmetered: 45%).

**Reducing regional flooding most important for unmetered**

(metered: 39%, unmetered: 48%).

**NW HH, resilience more important for higher quintiles**

(1: 43%, 2: 41% vs 3: 51%, 4: 56%, 5:55%).


**Reducing regional flooding more important for lower quintiles**

(1: 46%, 2: 52% vs 3: 41%, 4: 40%, 5: 39%).





Four enhancements were presented to Essex & Suffolk Water customers and so these were presented in one block of four. The enhancements were: metering, water efficiency and leakage, securing water supplies, improvements to asset health and resilience – climate change adaptation. Distinction was still made to identify the one discretionary enhancement in the set, which was the climate change adaptation investment.

Respondents were presented with the following information on each enhancement and again could hover over for more information.





## Improvements to asset health

Is this investment statutory?	
What does this investment involve?	Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.




## Metering, water efficiency and leakage

Is this investment statutory?	
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.



## Securing water supplies

Is this investment statutory?	
What does this investment involve?	Investment in new water supplies to meet new targets to reduce the amount of water that is taken from rivers and reduce environmental impact.

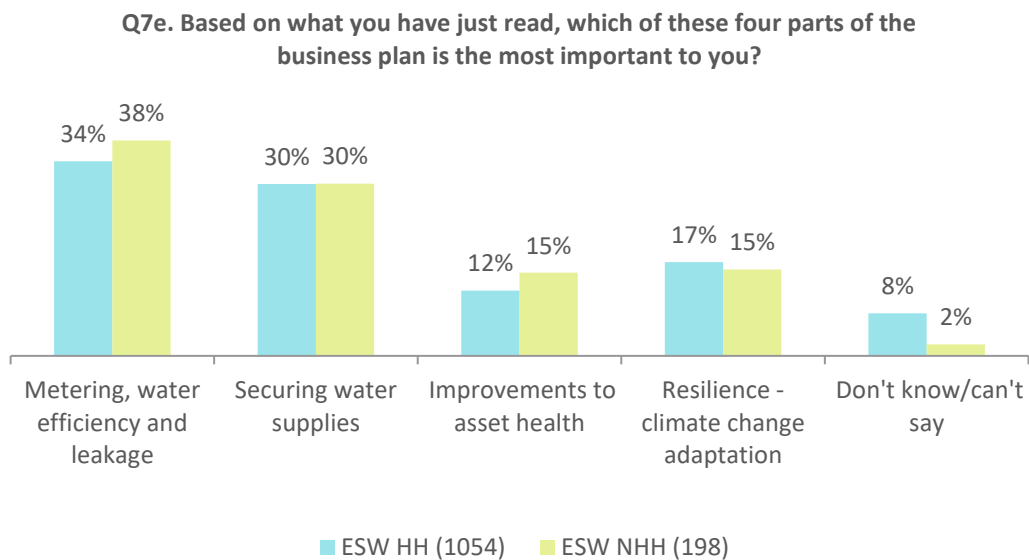


 <b>Resilience - climate change adaptation</b>	
Is this investment statutory?	⊗
What does this investment involve?	Protecting water treatment works from severe weather brought about by climate change to avoid services being interrupted.

Again, respondents were asked which of the parts of the plan they had reviewed was most important to them.

**Q7e. Based on what you have just read, which of these four parts of the business plan is the most important to you?**

Responses were fairly consistent across Household and Non-Household respondents in ESW, with metering, water efficiency and leakage seen as the most important part of the plan, followed by securing water supplies.



Cross-tabulation analysis identified a number of significant differences by customers segment as shown below.

**ESW HH, metering, water efficiency and leakage most important for metered customers.**

(metered: 41% vs unmetered 21%).

**Securing water supplies most important for unmetered**

(metered: 28% vs unmetered 36%).

**ESW HH, metering, water efficiency and leakage most important for females.**

(female: 38% vs male 31%).

**Securing water supplies most important for males.**

(females: 26% vs male 36%).

**ESW HH, securing water supplies most important for vulnerable customers.**

(35% has a vulnerability, 27% no vulnerability).



Finally in the acceptability section of the survey, respondents were asked to make a judgement based on their acceptance of the plan.

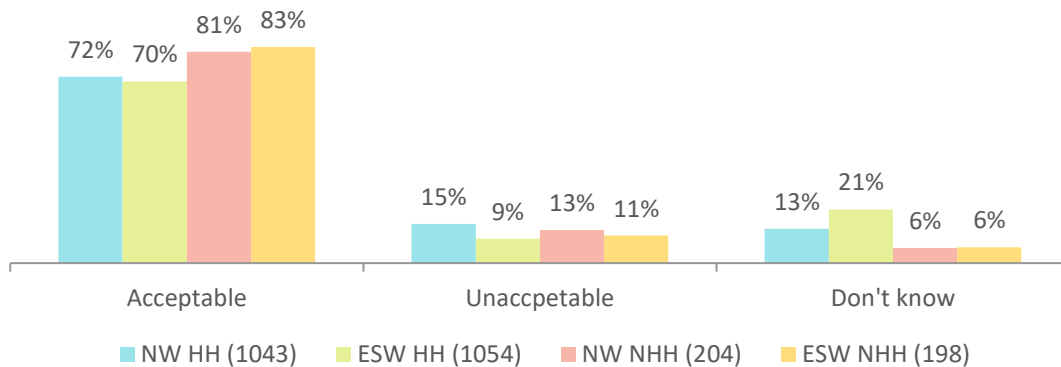
**Q8a. Based on everything you have seen and read about Northumbrian Water's/Essex & Suffolk Water's proposed business plan, how acceptable or unacceptable is it to you?**

Overall, the following levels of acceptance were achieved combining all NW and ESW Household and Non-Household respondents.

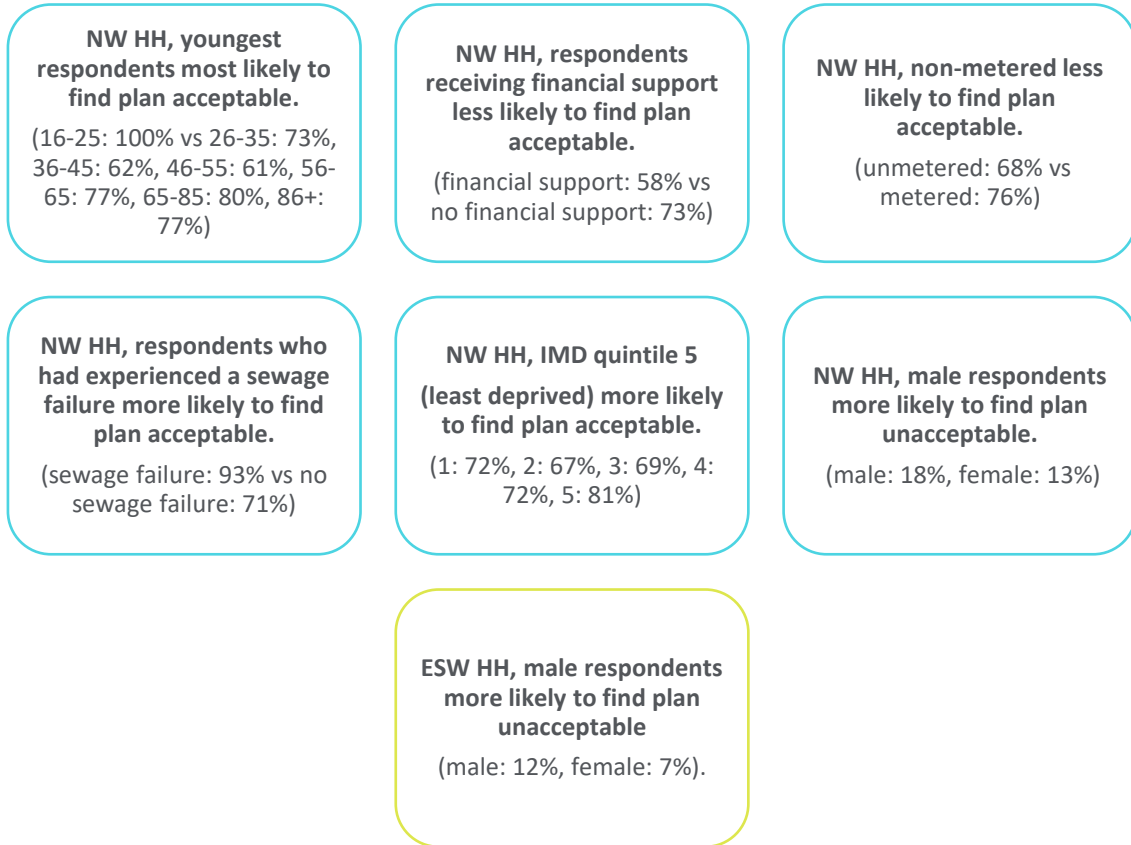
Survey response	Percentage
Acceptable	74%
Unacceptable	13%
Don't know	14%

The majority of all respondents thought the proposed business plan was acceptable, with acceptability higher for Non-Household respondents (81% Northumbrian Water, 83% Essex & Suffolk Water) than Household respondents (72% Northumbrian Water and 70% Essex & Suffolk Water). Northumbrian Water Household respondents were most likely to find the plan unacceptable (15%) compared with 9% for Essex & Suffolk Water. A higher proportion of Household respondents responded 'don't know' to the acceptability of the plan compared with Non-Household respondents.

**Q8a. Based on everything you have seen and read about Northumbrian Water's/Essex & Suffolk Water's proposed business plan, how acceptable or unacceptable is it to you?**



Cross-tabulation analysis has identified a number of statistically significant differences by customer segment as shown below.



Respondents who found the plan unacceptable were asked to explain why. A coded list of responses was presented to them, but they were also able to provide a free-text response if more appropriate. Respondents were asked to provide two reasons.

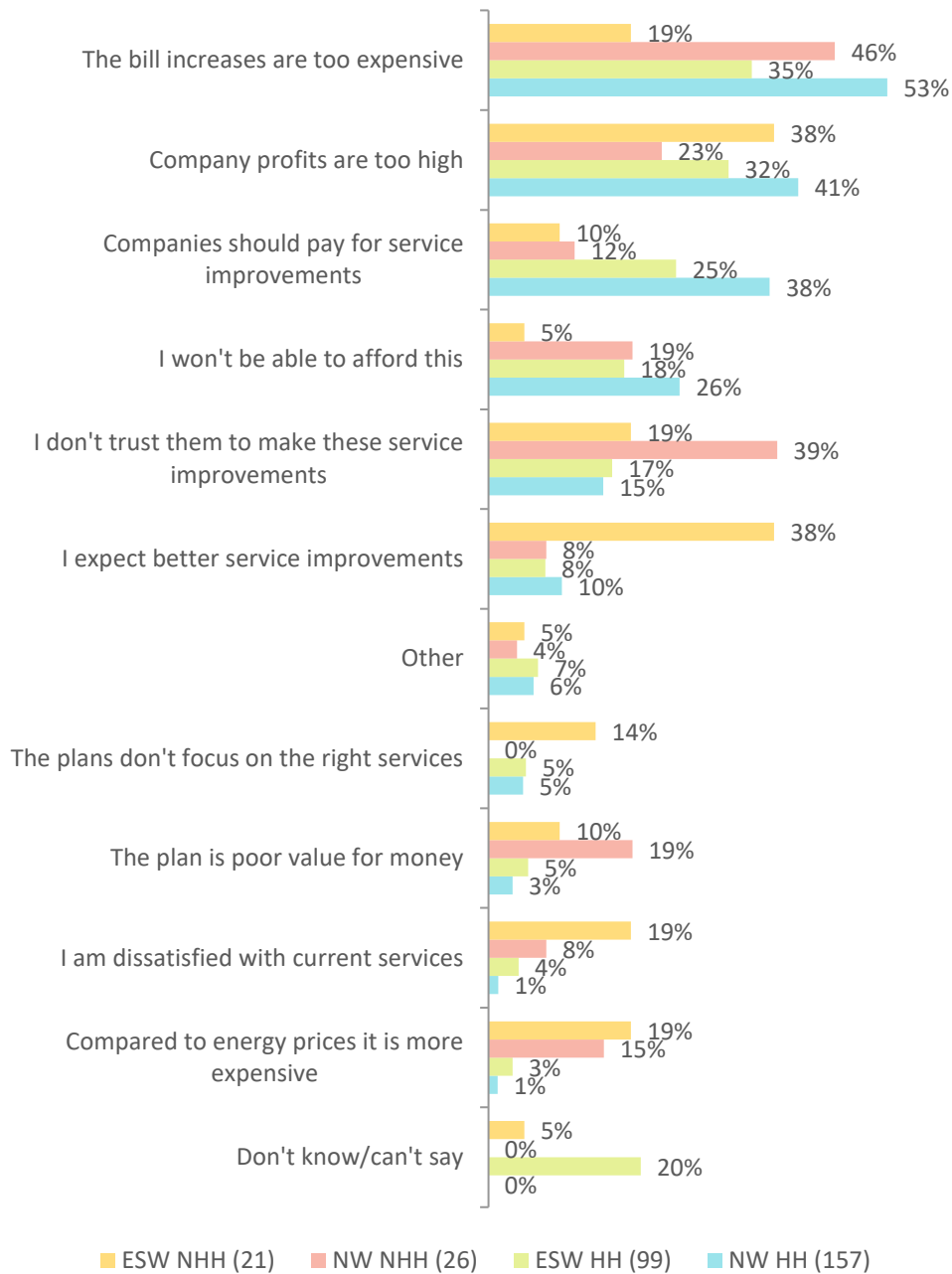
**Q8b. What are the two main reasons that you feel the proposals for your water services are unacceptable?**





The main reasons for Household respondents were the same across both regions, with ‘the bills are too expensive’ the top reason, followed by ‘company profits are too high’ and ‘companies should pay for service improvements’. Bills being too expensive was also the top reason for Northumbrian Water Non-Household respondents, followed by ‘I don’t trust them to make these service improvements’, however for Essex & Suffolk Non-Household it was ‘company profits are too high’ and ‘I expect better service improvements’.

**Q8b. What are the two main reasons that you feel the proposals for your water services are unacceptable?**



Cross-tabulation analysis has identified differences in reasons for finding the plan unacceptable by different demographic profiles as shown below.

**NW older respondents more likely to think company profits are too high**

(26-35: 10%, 36-45: 20% vs 46-55: 57%, 56-65: 65%, 66-85: 42%) (No unacceptability for 16-25 or 86+).

**NW younger respondents more likely to think 'I won't be able to afford this'**

(26-35: 46%, 36-45: 47% vs 56-65: 10%, 66-85: 11%) (No unacceptability for 16-25 or 86+).

**NW metered customers more likely to think company profits are too high**

(metered 53%, unmetered 35%).

**NW unmetered customers more likely to think 'I won't be able to afford this'**

(metered 11%, unmetered 34%).

**NW Tees respondents more likely to think 'I won't be able to afford this'**

(Northumberland & Tyne: 16%, Tees: 39%, Wear 20%).

**NW females more likely to think 'I won't be able to afford this'**

(female: 35%, male: 19%).

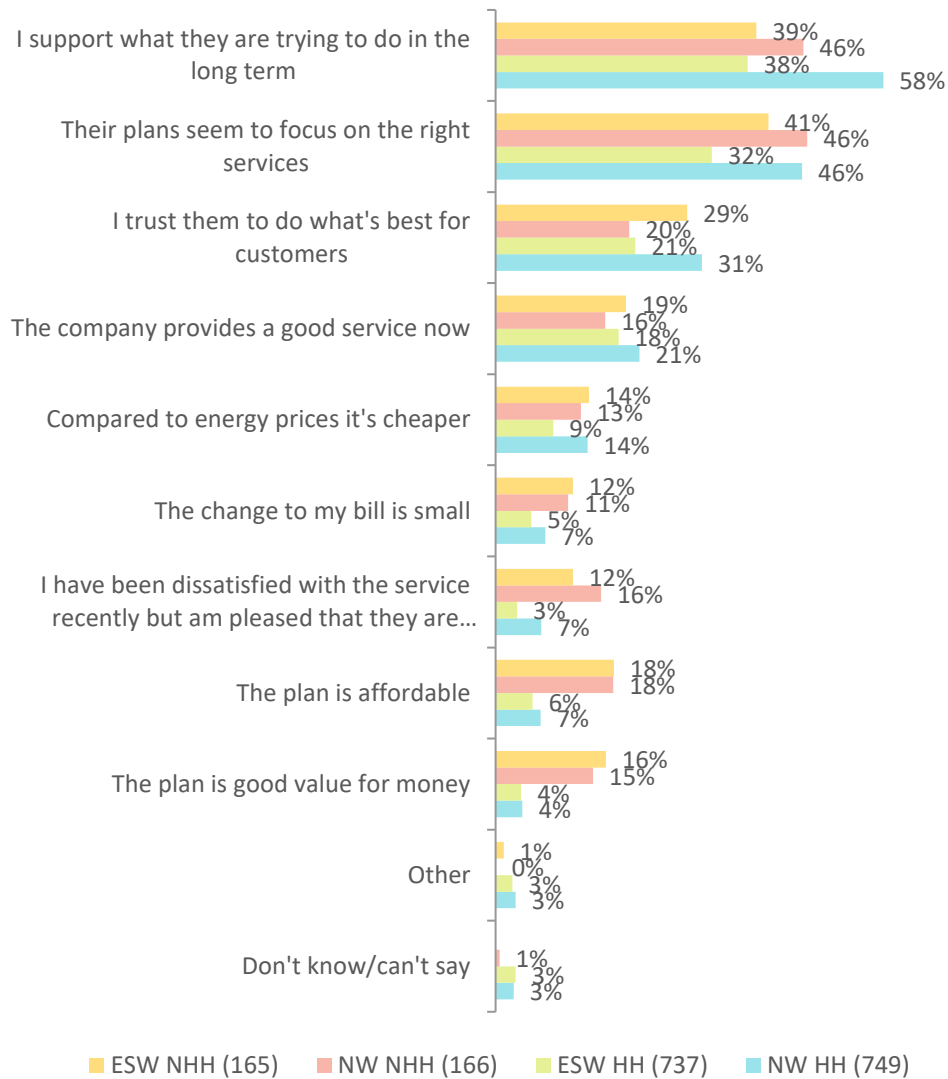


Respondents who found the plan acceptable were also asked to explain why and again were asked to select two reasons from a coded list or provide a free-text response.

**Q8b. What are the two main reasons that you feel the proposals for your water supply are acceptable?**

The first and second most common reasons selected across all respondent groups were either 'I support what they are trying to do in the longer term' or 'their plans seem to focus on the right services'. This was followed by 'I trust them to do what's best for customers' across all groups.

**Q8b. What are the two main reasons that you feel the proposals for your water supply are acceptable?**



Cross-tabulation analysis has identified a number of differences in reasons for acceptance by different customer groups as summarised below.

**NW younger respondents more likely to think 'compared to energy prices it's cheaper'**

(26-35: 23%, 36-45: 22% vs 56-65: 10%, 66-85: 10%, 86+: 0%).

**NW respondents receiving financial support more likely to think 'the plan is affordable'**

(no financial support: 6%, has financial support: 21%).

**NW IMD quintile 3, 4, 5 (least deprived) more likely to think 'I support what they are trying to do in the long term'**

(1: 46%, 2: 54%, 3:61% vs 4:66%, 5: 66%).

**NW with lowest income most likely to think 'I trust them to do what's best for customers'**

(Up to £10,400 52%, vs £10,400 to £15,599: 33%, £15,600 to £25,999: 32%, £26,000 to £36,399: 29%, £36,400 to £51,999: 23%, £52,000 to £72,799: 36%, £72,800 to £103,999: 16%, £104,000+: 16%).

**ESW Thames Water customers more likely to think 'I trust them to do what's best for customers'**

(Thames: 29%, Anglian 18%).

**ESW youngest most likely to think 'their plan seems to focus on the right areas'**

(16-25: 71% vs 26-35: 32%, 36-45: 36%, 46-55: 31%, 56-65: 31%, 66-85: 32%, 86+: 24%).

**ESW Thames Water IMD quintile 1 (most deprived) most likely to think 'I trust them to do what's best for customers'**

(1: 26%, 2: 24%, 3: 20%, 4: 18%, 5: 15%).

**ESW females more likely to think 'I trust them to do what's best for customers'**

(female: 25%, male: 16%).



Finally in this section respondents were asked their opinions in relation to phasing and intergenerational fairness via the following question.

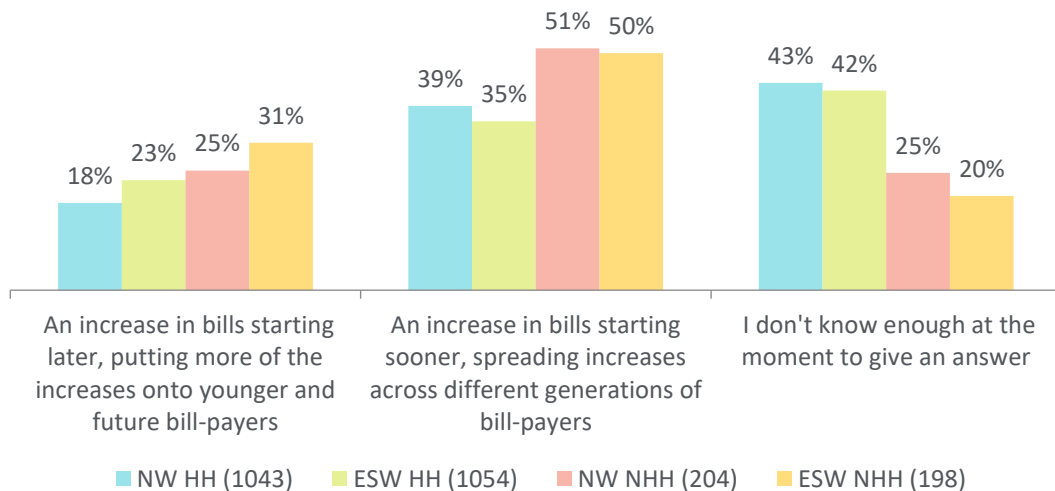
**Q9. Long term investment by Northumbrian Water/Essex & Suffolk Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?**

The table below shows overall responses combining NW and ESW Household and Non-Household customers.

Survey response	Percentage
An increase in bills starting later, putting more of the increases onto younger and future generations	22%
An increase in bills starting sooner, spreading increases across different generations of bill payers	40%
I don't know enough at the moment to give an answer	38%

Between the two options spreading increases across generations was preferred to pushing bill increases back. However, over 40% of NW and ESW Household customers were not able to give an answer.

**Q9. Long term investment by Northumbrian Water/Essex & Suffolk Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in t**



**NW youngest respondents were most likely to prefer an increase starting sooner.** (16-25: 57%, 26-35: 31%, 36-45: 47%, 46-55: 34%, 56-65: 35%, 66-85: 44%, 86+: 39%).

**NW respondents with no financial support more likely to prefer an increase starting sooner** (no financial support: 40% vs financial support: 21%).

**NW IMD quintile 1 (most deprived) and 2 more likely to prefer an increase starting later** (1: 21%, 2: 22%, 3: 18%, 4: 15%, 5: 13%).

**NW higher income more likely to prefer an increase starting sooner** (Up to £10,400 26%, £10,400 to £15,599: 32%, £15,600 to £25,999: 37%, £26,000 to £36,399: 51%, £36,400 to £51,999: 55%, £52,000 to £72,799: 55%, £72,800 to £103,999: 50%, £104,000+: 58%).

**ESW less deprived IMD quintiles more likely to prefer increase starting sooner** (1: 30%, 2: 33%, 3: 30%, 4: 40%, 5: 46%).

**ESW higher income more likely to prefer an increase starting sooner** (Up to £10,400 15%, £10,400 to £15,599: 44%, £15,600 to £25,999: 31%, £26,000 to £36,399: 40%, £36,400 to £51,999: 44%, £52,000 to £72,799: 42%, £72,800 to £103,999: 49%, £104,000+: 63%).



explain

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

## **Conclusions and recommendations**

A holistic review of the actionable insights.



# Conclusions

## Current financial status

There was evidence of particular affordability concerns amongst ESW Household customers with 65% agreeing that they sometimes struggle to pay one of their household bills compared to an overall result of 37%. In NW, younger age groups were comparatively more likely to state they struggled to pay their bills, with 47% agreeing they struggled to pay their bills most of the time or sometimes. As expected, those with higher incomes and in the least deprived IMD areas were least likely to struggle.

Similar patterns emerged when respondents were asked how well they were managing now. 70% of ESW Household respondents stated that they were 'just about getting by' compared to an overall average of 44%.

ESW household respondents were also most likely to be pessimistic about their future with 58% expecting their finances to get a lot worse up to 2030 compared to an overall result of 26%. Response amongst NW household respondents were fairly mixed, however those who received financial support, those living in the most deprived areas based on IMD and those on lower incomes were most pessimistic about their financial future. Non-Household customers in both regions showed greater levels of optimism with around half of each expecting their financial situation to get a little or a lot better.

## Current and future bills and affordability

Generally, respondents did not find their current water (and wastewater) bill difficult to pay with 46% finding it easy to pay, 37% saying it was neither easy nor difficult and only 15% finding it difficult. Comparatively, when presented with the proposed bill for 2025 to 2030, 46% overall stated they would find this difficult to pay whilst 20% would find it easy and 30% neither easy or difficult. Expected difficulty to afford the proposed bills was particularly apparent amongst lower income groups, younger groups and those living in areas classified as more deprived in the IMD.

Amongst those who would find the bills difficult to pay, when asked about steps they would take to be able to pay the proposed bills, spending less on food shopping and essentials was the top reason amongst both NW and ESW Household customers closely followed by spending less on non-essentials.





## Acceptability

Respondents were presented with a number of proposed service levels related to common PCs and asked which was the most important. Reducing leakage and reducing pollution incidents came out particularly strongly in terms of areas that were important to customers.

Respondents were then presented with information on enhancements included in the plan. In NW, when comparing the three statutory enhancements, 'metering, water efficiency and leakage' was felt to be most important, compared to 'reducing storm overflows' and 'improving asset health'. Views were mixed between the two NW discretionary investments with around half of respondents selecting each as the most important ('reducing regional flooding' and 'resilience – climate change adaptation'). In ESW 'metering, water efficiency and leakage' also emerged as the most important enhancement out of those presented to customers, followed by 'securing water supplies.'

When asked to take everything they had read into account, overall 74% agreed that they found NW/ESW's plan acceptable. Acceptance was particularly high amongst Non-Household customers (NW HH 72%, ESW HH 70%, NW NHH 81%, ESW NHH 83%).

Those who found the plan unacceptable were asked to explain why and the most common responses amongst customer groups was that the bill increases were too high or that that company profits are too high.

Reasons for finding the plan acceptable were that customers supported what NW/ESW were trying to do in the long term and that the plans seemed to focus on the right services.

## Phasing and intergenerational fairness

38% of respondents were not able to provide an informed opinion in regards to how bill increases should be spread over time. Respondents who were able to respond to this question were more likely to support a bill increase starting sooner, spreading increases across different generations of bill payers.

## Final conclusion

The NW/ESW plans were strongly accepted by customers overall, however affordability remains a concern particularly amongst those on lower incomes, receiving financial support already or living in areas classified as most deprived on the IMD.





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

## **Appendices**

Supporting documentation can be found in this section.

# Appendices

## Appendix 1 – NW HH survey



Thank you for clicking through to complete this survey.

This research is being conducted by Explain Market Research on behalf of Northumbrian Water. At the end of the survey, you will be given the option to claim a £10 voucher as a thank you for participating and Explain will collect your name and email address for this purpose only. Further details on how Explain process your data can be found here: <https://www.explainresearch.co.uk/privacy-policy/>

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 their proposed business plan for 2025-30 and how it may increase your bill.

It is very important to Northumbrian Water that the views of their customers are taken into account as they shape their plans.

If you have any questions about the research, please contact Explain via email at [haveyoursaynwg@explainonline.co.uk](mailto:haveyoursaynwg@explainonline.co.uk)

Next

0%

### About you

Firstly, we want to ask some questions to check you are eligible to take part in this research.

How old are you? \*

Please enter your age

Prefer not to say

Back

Next

3%



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

- Yes
- No, I am not responsible for paying the bill
- Don't know

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Next

5%

Are you currently charged for water through a water meter?

- Yes
- No
- Don't know

Northumbrian Water is your water company and is also responsible for your sewerage services. Does this sound right?

- Yes
- No
- Don't know

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Next

8%

## Affordability

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

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

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

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

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



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

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

Your current water and sewerage services bill is £ a year.

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

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

Back Next

11%

### The Northumbrian Water business plan

We are now going to show you some information about your water company's business plan. Water companies are required to develop business plans every five years. The plan we are showing you is for 2025-2030.

There are two main parts of the plan for you to think about:

1. Cost: how the business plan investments and inflation will increase your personal water and sewerage bill and whether this is affordable for you
2. Service: more detail on the levels of service Northumbrian Water will deliver between 2025 and 2030 and what is most important to you

After you have reviewed this information, we will ask you how acceptable you find the plan overall.

Back Next

16%



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

Water bills change each in year in line with inflation.

Inflation is the increase in prices paid for goods and services over time.

Household incomes also change over time.

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

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this.

As well as changing by inflation each year, bills change by an amount set by *Ofwat* as part of their price review process every five years.

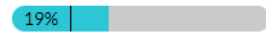
The proposed bill you can see in the graph below is for 2025 to 2030. It includes Bank of England forecasts for inflation from 2025 to 2030 - **these are the orange parts**. The graph also shows the proposed amounts to cover the investment in water and sewerage services needed over the next few years - **these are the blue parts and increase each year**.



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

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

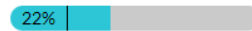
Back Next



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

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

Back Next



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

Northumbrian Water's business plan is made up of a number of different areas of performance. We are going to share these areas with you now in blocks of three.

The first three areas of performance are related to your water services.

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## Water supply interruptions lasting longer than 3 hours

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

[Click here to read more.](#)



Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 12th out of 17 companies overall on this measure.



Duration without water for more than 3 hours by minutes per property.

Portsmouth Water	00:02:21	<p>Better performance</p>  <p>Poorer performance</p> 
Bristol Water	00:02:31	
SES Water	00:02:58	
South Staffs Water	00:03:15	
Affinity Water	00:03:43	
Wessex Water	00:04:12	
United Utilities Water	00:07:58	
Southern Water	00:09:22	
Anglian Water	00:09:48	
Yorkshire Water	00:10:38	
Thames Water	00:11:03	
<b>Northumbrian Water</b>	<b>00:11:45</b>	
Severn Trent	00:12:39	
South West Bournemouth	00:13:40	
Welsh Water	00:16:12	
Hafren Dyfrdwy	00:37:28	
South East Water	01:12:33	

Northumbrian Water plans to reduce the length of time properties are without water to an average of 4 minutes 3 seconds by 2030.

## The appearance, taste and smell of tap water

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

[Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

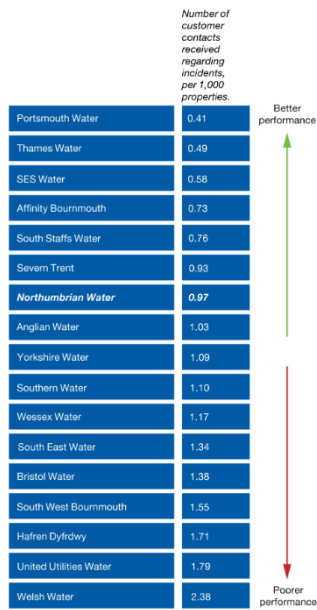
Northumbrian Water met its target for this metric last year.

Northumbrian Water performs 7th out of 17 companies overall on this measure.





Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
August 2023



Northumbrian Water plans to maintain contacts about the appearance, taste or odour of water at an average of 0.97 contacts per 1,000 properties between 2025 and 2030.

## Reducing leaks

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

[Click here to read more.](#)



Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 11th out of 19 companies overall on this measure.



Northumbrian Water Limited  
 NWL Affordability and Acceptability Testing quantitative research  
 August 2023

	Number of litres lost per property a day.	
Bristol Water	65.04	Better performance   Poorer performance
Essex & Suffolk Water	76.4	
Portsmouth Water	77.02	
SES Water	76.68	
Anglian Water	80.18	
Southern Water	83.17	
South East Water	87.63	
South Staffs Water (Cambridge)	90.67	
Wessex Water	103.29	
South West Bournemouth	107.71	
<b>Northumbrian Water</b>	<b>108.3</b>	
Affinity Water	108.65	
South Staffs Water (South Staffs)	113.45	
Severn Trent	119.66	
Yorkshire Water	122.91	
United Utilities Water	124.21	
Hafren Dyfrdwy	131.01	
Thames Water	151.51	
Welsh Water	158.8	

Northumbrian Water plans to reduce the amount of water lost to leaks to an average of 84.5 litres per property per day by 2030.

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Improving the taste, odour and appearance of water
- Reducing the time customers experience interruptions to their water supply
- Reducing leakage from the water network
- Don't know/can't say

Back Next

35% 



The next three areas of performance are related to your wastewater services.

Back

Next

41%

## Sewage flooding inside properties

Water companies are measured on the incidents of sewage flooding inside properties.

[Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 6th out of 11 companies overall on this measure.

	Number of properties affected, per 10,000.	
South West Bournemouth	0.76	Better performance ↑ ↓ Poorer performance
Welsh Water	1.36	
Wessex Water	1.42	
Severn Trent	1.61	
Anglian Water	1.73	
<b>Northumbrian Water</b>	<b>1.84</b>	
Hafren Dyfrdwy	2.34	
Yorkshire Water	2.83	
United Utilities Water	2.97	
Southern Water	3.04	
Thames Water	3.46	

Northumbrian Water plans to reduce sewage flooding inside properties to an average of 1.18 incidents per 10,000 properties by 2030.

Back

Next

43%



## Sewage flooding of gardens or outbuildings

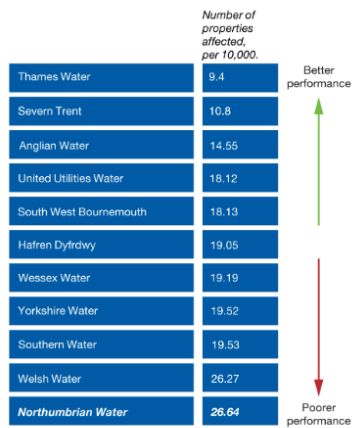
Water companies are measured on the incidents of sewage flooding in gardens or outbuildings.

[Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 11th out of 11 companies overall on this measure.



Northumbrian Water plans to reduce sewage flooding in gardens and outbuildings to an average of 16.25 incidents per 10,000 properties by 2030.

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46%

## Pollution of rivers and bathing waters

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

[Click here to read more.](#)



Companies with the lowest numbers perform best for this service.

Northumbrian Water met its target for this metric last year.

Northumbrian Water performs 5th out of 11 companies overall on this measure.



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	Number of incidents per 10,000km of sewer.	
United Utilities Water	17.71	Better performance   Poorer performance
Wessex Water	20.60	
Severn Trent	21.81	
Welsh Water	22.90	
<b>Northumbrian Water</b>	<b>22.98</b>	
Thames Water	24.87	
Yorkshire Water	27.36	
Anglian Water	33.75	
Hafren Dyfrdwy	39.84	
South West Bournemouth	86.58	
Southern Water	93.63	

Northumbrian Water plans to reduce pollution of rivers and streams to an average of 13.35 incidents per 10,000km of sewer by 2030.

Back Next

49%

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing internal sewer flooding
- Reducing pollution incidents
- Reducing external sewer flooding
- Don't know/can't say

Back Next

51%

The proposed plan also includes additional investments to meet statutory obligations (the law). These investments contribute to the bill increase you have seen for 2025 to 2030.

There are three statutory investments to show you in total.


You can click under each one to learn more.

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57%



 **Metering, water efficiency and leakage**


Is this investment statutory?	
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.

[Click here to read more.](#)

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 **Storm overflows**

Is this investment statutory?	
What does this investment involve?	<p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>• By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>• By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p>

[Click here to read more.](#)

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



 <b>Improvements to asset health</b>	
Is this investment statutory?	
What does this investment involve?	Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.

[Click here to read more.](#)

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65%

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Storm overflows
- Improvements to asset health
- Metering, water efficiency and leakage
- Don't know/can't say



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68%

There are two additional investments that Northumbrian Water are not required by law to make, but they are proposing them because they address risks and improve service for customers. We show you these investments in the next section.

Back Next

73%

 <b>Investment to reduce regional flooding</b>	
Is this investment statutory?	
What does this investment involve?	Working with north east Local Authorities, and the Environment Agency to reduce risk of all types of flooding across the region.

[Click here to read more.](#)

Back Next

76%



Resilience - climate change adaptation	
Is this investment statutory?	
What does this investment involve?	Protecting water and wastewater treatment works from severe weather brought about by climate change to avoid services being interrupted.

[Click here to read more.](#)

Back Next

78%

Based on what you have just read, which of these two parts of the business plan is the most important to you?

- Reducing regional flooding
- Resilience - climate change adaptation
- Don't know/can't say

Back Next

81%

Based on everything you have seen and read about Northumbrian Water's proposed business plan, how acceptable or unacceptable is it to you?

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

Back Next

84%





What are the two main reasons that you feel the proposals for your water services are unacceptable?  
(You can select a maximum options on this question) \*

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

Back Next

84%

What are two main reasons that you feel the proposals for your water supply are acceptable?  
(You can select a maximum options on this question) \*

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

Back Next

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

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

Back Next

89%



**More about you**

Thank you for your answers, we now want to understand a little more about you.

In which of the following ways do you identify?

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

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

- Higher managerial, administrative or professional e.g. doctor, lawyer, medium/large company director (50+ people)
- Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
- Supervisor, administrative or professional e.g. police officer, nurse, secretary, self employed
- Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- Retired

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

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

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

- White - English/Welsh/Scottish/Northern Irish/British
- White - Irish
- White - Gypsy or Irish Traveler
- Any other white background, please describe
- Mixed/Multiple ethnic groups - White and Black Caribbean
- Mixed/Multiple ethnic groups - White and Black African
- Mixed/Multiple ethnic groups - White and Asian
- Any other mixed/multiple ethnic background, please describe
- Asian/Asian British - Indian
- Asian/Asian British - Pakistani
- Asian/Asian British - Bangladeshi
- Asian/Asian British - Chinese
- Any other Asian/Asian British background, please describe
- Black - Black African
- Black - Black Caribbean
- Any other Black background, please describe
- Arab
- Any other ethnic group, please describe
- Prefer not to say



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

- Up to £199 a week/Up to £10,399 a year
- From £200 - £299 a week/From £10,400 to £15,599 a year
- From £300 - £499 a week/From £15,600 to £25,999 a year
- From £500 - £699 a week/From £26,000 to £36,399 a year
- From £700 - £999 a week/From £36,400 to £51,999 a year
- From £1000 - £1,399 a week/From £52,000 to £72,799 a year
- From £1400 - £1,999 a week/From £72,800 to £103,999 a year
- £2000 and above a week/£104,000 and above a year
- Don't know
- Prefer not to say

### We can help

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills.

More information about this can be found here: [Financial support \(nwl.co.uk\)](https://www.nwl.co.uk/financial-support)

We now need to take a few details from you to administer your £10 Amazon voucher. This information will only be used for this purpose and will not be attached to your answers to t

What is your full name?

What is your email address?

What is your contact telephone number?

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Submit

97% 



## Appendix 2 – ESW HH survey

### About you

Firstly, we want to ask some questions to check you are eligible to take part in this research.

How old are you? \*

- Please enter your age
- Prefer not to say

Are you solely or jointly responsible for paying your household's water bill? \*

- Yes
- No, I am not responsible for paying the bill
- Don't know

Are you currently charged for water through a water meter?

- Yes
- No
- Don't know

Essex & Suffolk Water is your water company and is also responsible for your sewerage services. Does this sound right?

- Yes
- No
- Don't know



## Affordability

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

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

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

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

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

Your current water bill is £ a year.

How easy or difficult is it for you to afford to pay your current water bill?

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

## Affordability

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

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

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

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

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



## The Essex & Suffolk Water business plan

We are now going to show you some information about your water company's business plan. Water companies are required to develop business plans every five years. The plan we are showing you is for 2025-2030.

There are two main parts of the plan for you to think about:

1. **Cost:** how the business plan investments and inflation will increase your personal water bill and whether this is affordable for you
2. **Service:** more detail on the levels of service Essex & Suffolk Water will deliver between 2025 and 2030 and what is most important to you

After you have reviewed this information, we will ask you how acceptable you find the plan overall.

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

Water bills change each in year in line with inflation.

Inflation is the increase in prices paid for goods and services over time.

Household incomes also change over time.

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

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this.

As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bill you can see in the graph below is for 2025 to 2030. It includes Bank of England forecasts for inflation from 2025 to 2030 - **these are the orange parts**. The graph also shows the proposed amounts to cover the investment in water services needed over the next few years - **these are the blue parts and increase each year**.

Remember you also pay **Anglian Water** for your wastewater services. By 2030, **Anglian Water** expect the average annual wastewater bill to have increased from £274.71 to £334.22.

## The Essex & Suffolk Water business plan

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There are two main parts of the plan for you to think about:

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The proposed bill you can see in the graph below is for 2025 to 2030. It includes Bank of England forecasts for inflation from 2025 to 2030 - **these are the orange parts**. The graph also shows the proposed amounts to cover the investment in water services needed over the next few years - **these are the blue parts and increase each year**.

Remember you also pay **Thames Water** for your wastewater services. By 2030, **Thames Water** expect the average annual wastewater bill to have increased from £198 to £252.47.



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

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

---

Your current water bill is £ a year.

How easy or difficult is it for you to afford to pay your current water bill?

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



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**Water supply interruptions lasting longer than 3 hours**

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

[Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water did not meet its target for this metric last year.

Essex & Suffolk Water performs 12th out of 17 companies overall on this measure.

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

Essex & Suffolk Water's business plan is made up of a number of different areas of performance. We are going to share three of these with you now.

Duration without water for more than 3 hours by minutes per property.

Portsmouth Water	00:02:21	<p>Better performance</p> <p>↑</p> <p>↓</p> <p>Poorer performance</p>
Bristol Water	00:02:31	
SES Water	00:02:58	
South Staffs Water	00:03:15	
Affinity Water	00:03:43	
Wessex Water	00:04:12	
United Utilities Water	00:07:58	
Southern Water	00:09:22	
Anglian Water	00:09:48	
Yorkshire Water	00:10:38	
Thames Water	00:11:03	
<b>Essex &amp; Suffolk Water</b>	<b>00:11:45</b>	
Severn Trent	00:12:39	
South West Bournemouth	00:13:40	
Welsh Water	00:16:12	
Hafren Dyfrdwy	00:37:28	
South East Water	01:12:33	





Essex & Suffolk Water plans to reduce the length of time properties are without water to an average of 4 minutes 3 seconds by 2030.

## The appearance, taste and smell of tap water

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



[Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water met its target for this metric last year.

Essex & Suffolk Water performs 7th out of 17 companies overall on this measure.

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

Portsmouth Water	0.41	Better performance   Poorer performance
Thames Water	0.49	
SES Water	0.58	
Affinity Water	0.73	
South Staffs Water	0.76	
Severn Trent	0.93	
<b>Essex &amp; Suffolk Water</b>	<b>0.97</b>	
Anglian Water	1.03	
Yorkshire Water	1.09	
Southern Water	1.10	
Wessex Water	1.17	
South East Water	1.34	
Bristol Water	1.38	
South West Bournemouth	1.55	
Hafren Dyfrdwy	1.71	
United Utilities Water	1.79	
Welsh Water	2.38	

Essex & Suffolk Water plans to maintain contacts about the appearance, taste or odour of water at an average of 0.97 contacts per 1,000 properties between 2025 and 2030.

## Reducing leaks

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

[Click here to read more.](#)



Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water did not meet its target for this metric last year.

Essex & Suffolk Water performs 2nd out of 19 companies overall on this measure.



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	Number of litres lost per property a day.	
Bristol Water	65.04	Better performance   Poorer performance
Essex & Suffolk Water	76.4	
Portsmouth Water	77.02	
SES Water	78.68	
Anglian Water	80.18	
Southern Water	83.17	
South East Water	87.63	
South Staffs Water (Cambridge)	90.67	
Wessex Water	103.29	
South West Bournemouth	107.71	
Northumbrian Water	108.3	
Affinity Water	108.65	
South Staffs Water (South Staffs)	113.45	
Severn Trent	119.66	
Yorkshire Water	122.91	
United Utilities Water	124.21	
Hafren Dyfrdwy	131.01	
Thames Water	151.51	
Welsh Water	158.8	

Essex & Suffolk Water plans to reduce the amount of water lost to leaks to an average of 59.1 litres per property per day by 2030.

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing the time customers experience interruptions to their water supply
- Improving the taste, odour and appearance of water
- Reducing leakage from the water network
- Don't know/can't say

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing leakage from the water network
- Improving the taste, odour and appearance of water
- Reducing the time customers experience interruptions to their water supply
- Don't know/can't say


The proposed plan also includes additional investments to meet statutory obligations (the law) or improve service for customers. These investments contribute to the bill increase you have seen for 2025 to 2030.

There are four investments to show you in total. You can click under each one to learn more.


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4%






### Metering, water efficiency and leakage

Is this investment statutory?	
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.


[Click here to read more.](#)

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### Improvements to asset health

Is this investment statutory?	
What does this investment involve?	Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.


[Click here to read more.](#)

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### Securing water supplies

Is this investment statutory?	
What does this investment involve?	Investment in new water supplies to meet new targets to reduce the amount of water that is taken from rivers and reduce environmental impact.

[Click here to read more.](#)

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 <b>Resilience - climate change adaptation</b>	
Is this investment statutory?	
What does this investment involve?	Protecting water treatment works from severe weather brought about by climate change to avoid services being interrupted.

[Click here to read more.](#)

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18% 

Based on what you have just read, which of these four parts of the business plan is the most important to you?

- Improvements to asset health
- Securing water supplies
- Metering, water efficiency and leakage
- Resilience - climate change adaptation
- Don't know/can't say

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21% 

Based on everything you have seen and read about Essex & Suffolk Water's proposed business plan, how acceptable or unacceptable is it to you?

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

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29% 



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What are the two main reasons that you feel the proposals for your water services are unacceptable?  
(You can select a maximum options on this question) \*

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

Back Next

29%

What are two main reasons that you feel the proposals for your water supply are acceptable?  
(You can select a maximum options on this question) \*

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

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29%

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

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

Back Next

36%



### More about you

Thank you for your answers, we now want to understand a little more about you.

In which of the following ways do you identify?

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

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

- Higher managerial, administrative or professional e.g. doctor, lawyer, medium/large company director (50+ people)
- Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
- Supervisor, administrative or professional e.g. police officer, nurse, secretary, self employed
- Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- Retired

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

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



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

- White - English/Welsh/Scottish/Northern Irish/British
- White - Irish
- White - Gypsy or Irish Traveler
- Any other white background, please describe
- Mixed/Multiple ethnic groups - White and Black Caribbean
- Mixed/Multiple ethnic groups - White and Black African
- Mixed/Multiple ethnic groups - White and Asian
- Any other mixed/multiple ethnic background, please describe
- Asian/Asian British - Indian
- Asian/Asian British - Pakistani
- Asian/Asian British - Bangladeshi
- Asian/Asian British - Chinese
- Any other Asian/Asian British background, please describe
- Black - Black African
- Black - Black Caribbean
- Any other Black background, please describe
- Arab
- Any other ethnic group, please describe
- Prefer not to say

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

- Up to £199 a week/Up to £10,399 a year
- From £200 - £299 a week/From £10,400 to £15,599 a year
- From £300 - £499 a week/From £15,600 to £25,999 a year
- From £500 - £699 a week/From £26,000 to £36,399 a year
- From £700 - £999 a week/From £36,400 to £51,999 a year
- From £1000 - £1,399 a week/From £52,000 to £72,799 a year
- From £1400 - £1,999 a week/From £72,800 to £103,999 a year
- £2000 and above a week/£104,000 and above a year
- Don't know
- Prefer not to say

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39% 



**Northumbrian Water Limited**  
**NWL Affordability and Acceptability Testing quantitative research**  
**August 2023**

**We can help**

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills.

More information about this can be found here: [Financial support \(eswater.co.uk\)](https://www.eswater.co.uk/financial-support)

We now need to take a few details from you to administer your £10 Amazon voucher. This information will only be used for this purpose and will not be attached to your answers to the survey.

What is your full name?

What is your email address?

What is your contact telephone number?

Back Submit

96%

## Appendix 3 – NW NHH

Thank you for clicking through to complete this survey.

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

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 their proposed business plan for 2025-30 and how it may increase your wholesale bill.

Businesses, charities and public sector organisations in England can shop around for their water retailer. In simple terms, Northumbrian Water provide water and wastewater services to the business customer but don't manage the account. You may not be a retail customer of Northumbrian Water, but you are a wholesale customer.

It is very important to Northumbrian Water that the views of their customers are taken into account as they shape their plans.

If you have any questions about the research, please contact Explain via email at [haveyoursaynw@explainonline.co.uk](mailto:haveyoursaynw@explainonline.co.uk)

Next

0%

### About you

Firstly, we want to ask some questions to check you are eligible to take part in this research.

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

Yes

No

Back Next

2%





Does the business have its own premises?

- Yes
- No - run out of a home or vehicle, for example

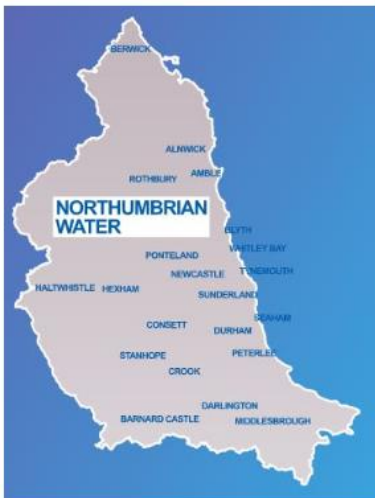
Back

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5% 

Does your business have premises in the Northumbrian Water region?

- Yes
- No



## Affordability

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

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

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

Overall, how well would you say your organisation is managing financially now?

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

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

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

How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill?

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

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10%

## The Northumbrian Water business plan

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

There are two main parts of the plan for you to think about:

1. **Cost:** how the business plan investments and inflation will increase your organisation's water and sewerage bill and whether this is affordable for your organisation
2. **Service:** more detail on the levels of service Northumbrian Water will deliver between 2025 and 2030 and what is most important to you

After you have reviewed this information, we will ask you how acceptable you find the plan overall.

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15%



**Northumbrian Water Limited**  
**NWL Affordability and Acceptability Testing quantitative research**  
**August 2023**

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

Water bills change each year in line with inflation.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this.

As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you can see on the graph on the next page are for the years 2025 to 2030.

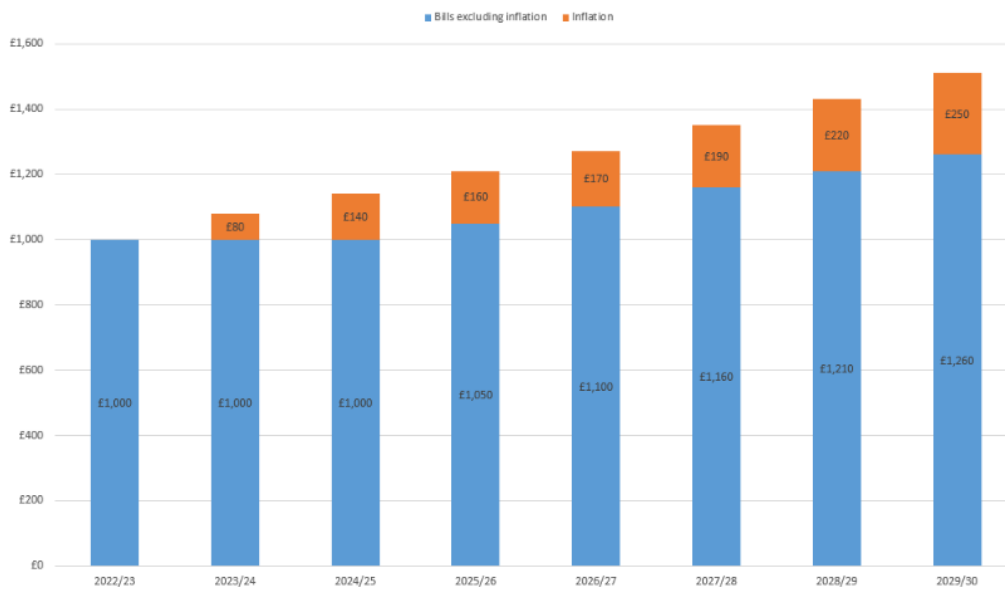
The proposed bill you can see in the graph below is for 2025 to 2030. It includes Bank of England forecasts for inflation from 2025 to 2030 - **these are the orange parts**. The graph also shows the proposed amounts to cover the investment in water and sewerage services needed over the next few years - **these are the blue parts and increase each year**.

Do you know the amount your organisation pays for their water and sewerage bill per year?

- Yes
- No

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

17%



How easy or difficult do you think it would be for your organisation to afford its water and sewerage bills if they went up at the same rate?

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

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

20%



Please enter your ANNUAL bill amount to the nearest £ below.

Back Next

24%

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

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

Back Next

29%

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

Northumbrian Water's business plan is made up of a number of different areas of performance. We are going to share these areas with you now in blocks of three.

The first three areas of performance are related to your water services.

Back Next

34%

### Water supply interruptions lasting longer than 3 hours



Water companies are measured on the length of time properties are without water. [Click here to read more.](#)  
Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 12th out of 17 companies overall on this measure.



Northumbrian Water Limited  
 NWL Affordability and Acceptability Testing quantitative research  
 August 2023

	Duration without water for more than 3 hours by minutes per property.	
Portsmouth Water	00:02:21	Better performance   Poorer performance
Bristol Water	00:02:31	
SES Water	00:02:58	
South Staffs Water	00:03:15	
Affinity Water	00:03:43	
Wessex Water	00:04:12	
United Utilities Water	00:07:58	
Southern Water	00:09:22	
Anglian Water	00:09:48	
Yorkshire Water	00:10:38	
Thames Water	00:11:03	
<b>Northumbrian Water</b>	<b>00:11:45</b>	
Severn Trent	00:12:39	
South West Bourne-mouth	00:13:40	
Welsh Water	00:16:12	
Hafren Dyfrdwy	00:37:28	
South East Water	01:12:33	

Northumbrian Water plans to reduce the length of time properties are without water to an average of 4 minutes 3 seconds by 2030.

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**The appearance, taste and smell of tap water**

Water companies are measured on the number of customer contacts regarding the appearance, taste and smell of tap water. [Click here to read more.](#)

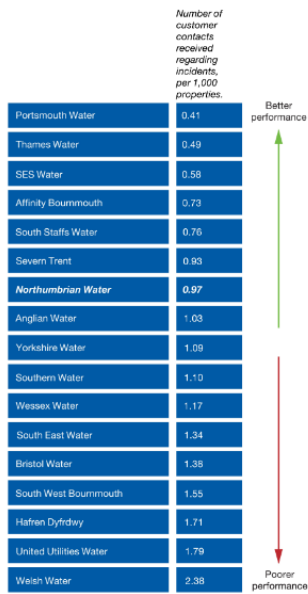
Companies with the lowest numbers perform best for this service.

Northumbrian Water met its target for this metric last year.

Northumbrian Water performs 7th out of 17 companies overall on this measure.



Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
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Northumbrian Water plans to maintain contacts about the appearance, taste or odour of water at an average of 0.97 contacts per 1,000 properties between 2025 and 2030.

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39%

### Reducing leaks

Water companies are measured on the amount of water lost due to leaks from water mains and pipes. [Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 11th out of 19 companies overall on this measure.



Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
August 2023

	Number of litres lost per property a day.	
Bristol Water	65.04	Better performance ↑
Essex & Suffolk Water	76.4	
Portsmouth Water	77.02	
SES Water	78.68	
Anglian Water	80.18	
Southern Water	83.17	
South East Water	87.63	
South Staffs Water (Cambridge)	90.67	
Wessex Water	103.29	
South West Boumemouth	107.71	
<b>Northumbrian Water</b>	<b>108.3</b>	
Affinity Water	108.65	
South Staffs Water (South Staffs)	113.45	
Severn Trent	119.66	
Yorkshire Water	122.91	
United Utilities Water	124.21	
Hafren Dyfrdwy	131.01	
Thames Water	151.51	
Welsh Water	158.8	
		↓ Poorer performance

Northumbrian Water plans to reduce the amount of water lost to leaks to an average of 84.5 litres per property per day by 2030.

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Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing the time customers experience interruptions to their water supply
- Improving the taste, odour and appearance of water
- Reducing leakage from the water network
- Don't know/can't say

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The next three areas of performance are related to your wastewater services.

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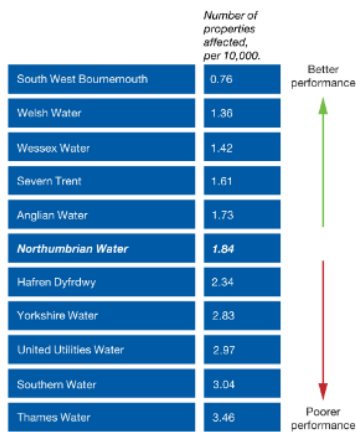
### Sewage flooding inside properties

Water companies are measured on the incidents of sewage flooding inside properties. [Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 6th out of 11 companies overall on this measure.



Northumbrian Water plans to reduce sewage flooding inside properties to an average of 1.18 incidents per 10,000 properties by 2030.

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### Sewage flooding of gardens or outbuildings

Water companies are measured on the incidents of sewage flooding in gardens or outbuildings. [Click here to read more.](#)

Companies with the lowest numbers perform best for this service.



Northumbrian Water did not meet its target for this metric last year.

Northumbrian Water performs 11th out of 11 companies overall on this measure.





Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
August 2023

	Number of properties affected, per 10,000.	
Thames Water	9.4	Better performance   Poorer performance
Severn Trent	10.8	
Anglian Water	14.55	
United Utilities Water	15.12	
South West Bournemouth	18.13	
Hafron Dyfrdwy	19.05	
Wessex Water	19.19	
Yorkshire Water	19.52	
Southern Water	19.53	
Welsh Water	26.27	
<b>Northumbrian Water</b>	<b>26.64</b>	

Northumbrian Water plans to reduce sewage flooding in gardens and outbuildings to an average of 16.25 incidents per 10,000 properties by 2030.

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### Pollution of rivers and bathing waters

Water companies are measured on the number of incidents of pollution of rivers and streams. [Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Northumbrian Water met its target for this metric last year.

Northumbrian Water performs 5th out of 11 companies overall on this measure.

	Number of incidents per 10,000km of sewer.	
United Utilities Water	17.71	Better performance   Poorer performance
Wessex Water	20.60	
Severn Trent	21.61	
Welsh Water	22.90	
<b>Northumbrian Water</b>	<b>22.98</b>	
Thames Water	24.87	
Yorkshire Water	27.36	
Anglian Water	33.75	
Hafron Dyfrdwy	39.84	
South West Bournemouth	86.58	
Southern Water	93.63	

Northumbrian Water plans to reduce pollution of rivers and streams to an average of 13.35 incidents per 10,000km of sewer by 2030.

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Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing internal sewer flooding
- Reducing external sewer flooding
- Reducing pollution incidents
- Don't know/can't say

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59%

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing pollution incidents
- Reducing external sewer flooding
- Reducing internal sewer flooding
- Don't know/can't say

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61%

The proposed plan also includes additional investments to meet statutory obligations (the law). These investments contribute to the bill increase you have seen for 2025 to 2030.

There are three statutory investments to show you in total.

You can click under each one to learn more.

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63%

### Metering, water efficiency and leakage

Is this investment statutory?	<input checked="" type="checkbox"/>
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.


[Click here to read more.](#)

Back Next

66%



 **Storm overflows**


Is this investment statutory?	
What does this investment involve?	<p>When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.</p> <p>There are around 15,000 storm overflows in England, and 1,190 for Northumbrian Water.</p> <p><b>Each company (in England) has a target set by Government to reduce the use of storm overflows:</b></p> <ul style="list-style-type: none"> <li>• By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites</li> <li>• By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm</li> </ul> <p>Northumbrian Water will work towards these longer-term targets in its business plan for 2025-2030.</p>

[Click here to read more.](#)

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



 **Improvements to asset health**

Is this investment statutory?	
What does this investment involve?	<p>Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.</p>

[Click here to read more.](#)

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



Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Metering, water efficiency and leakage
- Storm overflows
- Improvements to asset health
- Don't know/can't say

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Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Improvements to asset health
- Storm overflows
- Metering, water efficiency and leakage
- Don't know/can't say

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There are two additional investments that Northumbrian Water are not required by law to make, but they are proposing them because they address risks and improve service for customers.

We show you these investments in the next section.

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### Investment to reduce regional flooding

Is this investment statutory?



What does this investment involve?

Working with north east Local Authorities, and the Environment Agency to reduce risk of all types of flooding across the region.

[Click here to read more.](#)

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 <b>Resilience - climate change adaptation</b>	
Is this investment statutory?	
What does this investment involve?	Protecting water and wastewater treatment works from severe weather brought about by climate change to avoid services being interrupted.

[Click here to read more.](#)

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

83%

Based on what you have just read, which of these two parts of the business plan is the most important to you?

- Reducing regional flooding
- Resilience - climate change adaptation
- Don't know/can't say

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85%

Based on everything you have seen and read about Northumbrian Water's proposed business plan, how acceptable or unacceptable is it to you?

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

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

88%



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

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

Back

Next

88%

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

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

Back

Next

88%

Based on everything you have seen and read about Northumbrian Water's proposed business plan, how acceptable or unacceptable is it to you?

- Completely unacceptable
- Unacceptable
- Acceptable
- Completely acceptable
- Don't know/can't say

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Next

90%



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

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

Back

Next

93%

### More about you

Thank you for your answers, we now want to understand a little more about you.

How does your organisation mainly use water at its premises?

*Please select all that apply*

- For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)
- For the supply of services your organisation provides (eg cleaning services etc)
- For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)
- For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)
- None of the above
- Don't Know

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

*Please select one answer only*

- 1
- 2
- 3
- 4
- 5-10
- 11-50
- 51-50
- 51-250
- 250+
- Prefer not to say

How many employees does your organisation have in the UK?

*Please select one answer only*

- 0 (sole trader)
- 1 to 9 employees (micro)
- 10 to 49 employees (small)
- 50 to 249 employees (medium)
- 250+ employees (large)
- Prefer not to say



---

Which of the following best defines the core activity of your organisation?  
*Please select one answer only*

- Agriculture, forestry and fishing
- Mining and quarrying
- Energy or water service & supply
- Manufacturing
- Construction
- Transport and storage
- Hotels & catering
- IT and Communication
- Finance and insurance activities
- Real estate activities
- Professional, scientific and technical activities
- Administrative and Support Service Activities
- Public administration and defence
- Education
- Human health and social work activities
- Arts, entertainment and recreation
- Other service activities
- Other (Please specify)
- Prefer not to say

---

**Thank You!**

Thank you for taking our survey. Your response is very important to us.

100% 





## Appendix 4 – ESW NHH



Thank you for clicking through to complete this survey.

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

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 their proposed business plan for 2025-30 and how it may increase your organisation's bill.

Businesses, charities and public sector organisations in England can shop around for their water retailer. In simple terms, Essex & Suffolk Water provide water services to the business customer but don't manage the account. You may not be a retail customer of Essex & Suffolk Water, but you are a wholesale customer.

It is very important to Essex & Suffolk Water that the views of their customers are taken into account as they shape their plans.

If you have any questions about the research, please contact Explain via email at [haveyoursaynwg@explainonline.co.uk](mailto:haveyoursaynwg@explainonline.co.uk)

Next

0%

### About you

Firstly, we want to ask some questions to check you are eligible to take part in this research.

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

- Yes
- No

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Next

3%

Does the business have its own premises?

- Yes
- No - run out of a home or vehicle, for example

Back

Next

6%



Does your business have premises in the Essex & Suffolk Water region?

- Yes
- No



Back Next

9%

### Affordability

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

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

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

Overall, how well would you say your organisation is managing financially now?

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



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

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

How easy or difficult is it for your company/organisation to afford to pay your current water bill?

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

Back Next

13%

## The Essex & Suffolk Water business plan

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

There are two main parts of the plan for you to think about:

1. **Cost:** how the business plan investments and inflation will increase your organisation's water bill and whether this is affordable for your organisation
2. **Service:** more detail on the levels of service Essex & Suffolk Water will deliver between 2025 and 2030 and what is most important to you

After you have reviewed this information, we will ask you how acceptable you find the plan overall.

Back Next

25%



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

Water bills change each in year in line with inflation.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this.

As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you can see on the graph on the next page are for the years 2025 to 2030.

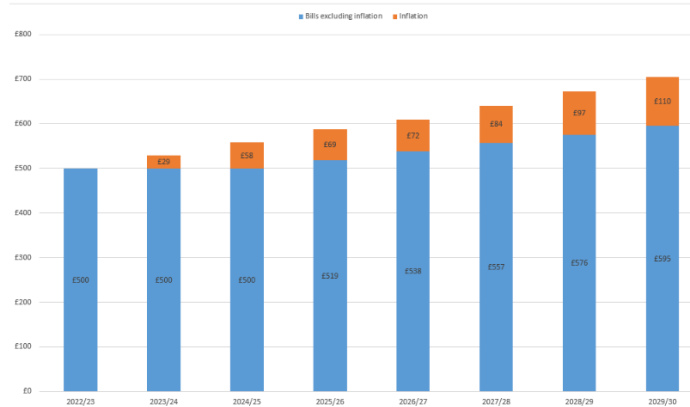
The proposed bill you can see in the graph below is for 2025 to 2030. It includes Bank of England forecasts for inflation from 2025 to 2030 - **these are the orange parts**. The graph also shows the proposed amounts to cover the investment in water services needed over the next few years - **these are the blue parts and increase each year**.

Do you know the amount your organisation pays for their water bill per year?

- Yes
- No

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25%



Remember you also pay Anglian Water or Thames Water for your wastewater services. By 2030 these companies are expecting the following bill increases to wastewater services:

- Thames Water: 42% by 2030 plus inflation
- Anglian Water: 11% by 2030 plus inflation

How easy or difficult do you think it would be for your organisation to afford its water bills if they went up at the same rate?

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

Back Next

25%



Please enter your ANNUAL bill amount to the nearest £ below.

Back Next

31%

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

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

Back Next

38%

Thank you. We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025 - 2030. Essex & Suffolk Water's business plan is made up of a number of different areas of performance. We are going to share three of these with you now.

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44%

### Water supply interruptions lasting longer than 3 hours

Water companies are measured on the length of time properties are without water. [Click here to read more.](#)

Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water did not meet its target for this metric last year.

Essex & Suffolk Water performs 12th out of 17 companies overall on this measure.





Essex & Suffolk Water plans to reduce the length of time properties are without water to an average of 4 minutes 3 seconds by 2030.

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47%

### The appearance, taste and smell of tap water

Water companies are measured on the number of customer contacts regarding the appearance, taste and smell of tap water. [Click here to read more.](#)

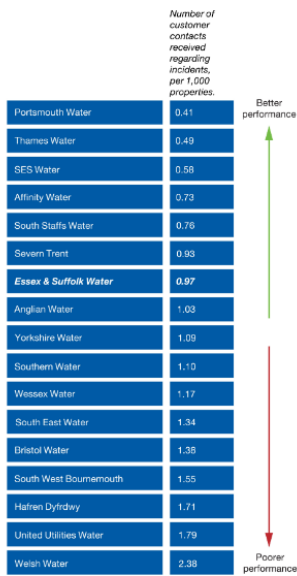
Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water met its target for this metric last year.

Essex & Suffolk Water performs 7th out of 17 companies overall on this measure.



Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
August 2023



Essex & Suffolk Water plans to maintain contacts about the appearance, taste or odour of water at an average of 0.97 contacts per 1,000 properties between 2025 and 2030.

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50%

### Reducing leaks

Water companies are measured on the amount of water lost due to leaks from water mains and pipes. [Click here to read more.](#)


Companies with the lowest numbers perform best for this service.

Essex & Suffolk Water did not meet its target for this metric last year.

Essex & Suffolk Water performs 2nd out of 19 companies overall on this measure.



Northumbrian Water Limited  
NWL Affordability and Acceptability Testing quantitative research  
August 2023

	Number of litres lost per property a day.	
Bristol Water	65.04	Better performance  Poorer performance 
<b>Essex &amp; Suffolk Water</b>	<b>76.4</b>	
Portsmouth Water	77.02	
SES Water	78.68	
Anglian Water	80.18	
Southern Water	83.17	
South East Water	87.63	
South Staffs Water (Cambridge)	90.67	
Wessex Water	103.29	
South West Bouremouth	107.71	
Northumbrian Water	108.3	
Afinity Water	108.65	
South Staffs Water (South Staffs)	113.45	
Severn Trent	119.66	
Yorkshire Water	122.91	
United Utilities Water	124.21	
Hafron Dyfrdwy	131.01	
Thames Water	151.51	
Welsh Water	158.8	

Essex & Suffolk Water plans to reduce the amount of water lost to leaks to an average of 59.1 litres per property per day by 2030.

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53%

Based on what you have just read, which of these three parts of the business plan is the most important to you?

- Reducing the time customers experience interruptions to their water supply
- Improving the taste, odour and appearance of water
- Reducing leakage from the water network
- Don't know/can't say

Back Next

56%

The proposed plan also includes additional investments to meet statutory obligations (the law) or improve service for customers. These investments contribute to the bill increase you have seen for 2025 to 2030.


There are four investments to show you in total. You can click under each one to learn more.


Back Next

63%






 **Metering, water efficiency and leakage**


Is this investment statutory?	
What does this investment involve?	Making sure there is enough water available in the future by helping homes and businesses to use less and reducing leakage from the water network.

[Click here to read more.](#)

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




 **Improvements to asset health**


Is this investment statutory?	
What does this investment involve?	Replacing and refurbishing equipment like pipes and treatment works so it continues to provide a reliable service to customers.

[Click here to read more.](#)

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




 **Securing water supplies**

Is this investment statutory?	
What does this investment involve?	Investment in new water supplies to meet new targets to reduce the amount of water that is taken from rivers and reduce environmental impact.

[Click here to read more.](#)

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



Resilience - climate change adaptation	
Is this investment statutory?	
What does this investment involve?	Protecting water treatment works from severe weather brought about by climate change to avoid services being interrupted.

[Click here to read more.](#)

Back Next

75%

Based on what you have just read, which of these four parts of the business plan is the most important to you?

- Metering, water efficiency and leakage
- Improvements to asset health
- Securing water supplies
- Resilience - climate change adaptation
- Don't know/can't say

Back Next

78%

Based on everything you have seen and read about Essex & Suffolk Water's proposed business plan, how acceptable or unacceptable is it to you?

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

Back Next

84%



**Northumbrian Water Limited**  
**NWL Affordability and Acceptability Testing quantitative research**  
**August 2023**

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

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

Back

Next

84% 

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

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

Back

Next

84% 

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

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

Back

Next

91% 



**Northumbrian Water Limited**  
**NWL Affordability and Acceptability Testing quantitative research**  
**August 2023**

**More about you**

Thank you for your answers, we now want to understand a little more about you.

How does your organisation mainly use water at its premises?

*Please select all that apply*

- For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)
- For the supply of services your organisation provides (eg cleaning services etc)
- For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)
- For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)
- None of the above
- Don't Know

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

*Please select one answer only*

- 1
- 2
- 3
- 4
- 5-10
- 11-50
- 51-50
- 51-250
- 250+
- Prefer not to say

How many employees does your organisation have in the UK?

*Please select one answer only*

- 0 (sole trader)
- 1 to 9 employees (micro)
- 10 to 49 employees (small)
- 50 to 249 employees (medium)
- 250+ employees (large)
- Prefer not to say

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

*Please select one answer only*

- Agriculture, forestry and fishing
- Mining and quarrying
- Energy or water service & supply
- Manufacturing
- Construction
- Transport and storage
- Hotels & catering
- IT and Communication
- Finance and insurance activities
- Real estate activities
- Professional, scientific and technical activities
- Administrative and Support Service Activities
- Public administration and defence
- Education
- Human health and social work activities
- Arts, entertainment and recreation
- Other service activities
- Other (Please specify)
- Prefer not to say

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Submit



**Thank You!**

Thank you for taking our survey. Your response is very important to us.





## Appendix 5 – Survey invites

### Northumbrian Water version

Account number: XXXX

Unique ID: XXX

Hello,

#### **Have your say and earn £10!**

We would like to hear your views about the services we provide and how they, and the cost of them, may increase between 2025-30. Your views will help us understand what our customers think of our plan for 2025-30.

Please take part in our survey to have your say. It will take around 15 minutes to complete.

#### **What's in it for me?**

A £10 voucher. This will be sent to you within five working days of completing the survey.

#### **What do I need to do?**

Follow this link [\[LINK\]](#) to take part in this survey online.

For the best experience we encourage you to take part in the survey on a desktop, laptop or tablet. However, you can also take part on your mobile phone.

When you arrive at the survey, enter your unique ID printed at the top of this letter and complete the survey.

We're working with an independent market research agency called Explain Market Research- [www.explainresearch.co.uk](http://www.explainresearch.co.uk)

Once you have entered your unique ID in the survey, Explain will be able to view some further anonymous information about you that we will share with them, including your annual Northumbrian Water bill amount and whether you are in receipt of financial support. This is so that during the research Explain will be able to show you how your own bill might change between 2025-30. Explain



has not been provided with any of your personal information. You can read their privacy policy here:  
[LINK]

Explain will collect your name and email address or address in the survey only so they can send you your voucher. Your survey responses will be kept anonymous and Explain will delete all data after three months.

If you prefer to receive a paper copy of the survey, or require the survey in any other language or format, please contact Explain at [haveyoursaynwg@explainonline.co.uk](mailto:haveyoursaynwg@explainonline.co.uk) or by calling 0800 059 0124 by Monday 24 July. Please note the phone line will be open 8.30am – 5.00pm (excluding weekends).

This survey will close on Sunday 30 July.

If you complete the survey online you will receive an Amazon voucher via email. If you complete a paper version of the survey, you will receive a high street voucher through the post.

We look forward to hearing from you.

With best wishes,

Lucy

Customer Research and Engagement Team





### Essex & Suffolk Water version

Account number: XXXX

Unique ID: XXXX

Hello,

#### **Have your say and earn £10!**

We would like to hear your views about the services we provide and how they, and the cost of them, may increase between 2025-30. Your views will help us understand what our customers think of our plan for 2025-30.

Please take part in our survey to have your say. It will take around 15 minutes to complete.

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Explain will collect your name and email address or address in the survey only so they can send you your voucher. Your survey responses will be kept anonymous and Explain will delete all data after three months.

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With best wishes,

Lucy

Customer Research and Engagement Team



## Appendix 6 – Ofwat data tables

Figures in tables in this appendix are the numbers of household and non-household customers engaged in relation to the AAT quantitative research only.

Line description	Units	Decimal places	2022-23				
Customer engagement							
Number of household customers engaged with on the business plan	nr	0	2,098				
Number of non-household customers engaged with on the business plan	nr	0	402				

Line description	Units	Decimal places	Affordability and acceptability of business plans				
			Water only customer (water bill only and water only business plan)				
			Household customers	Household with Vulnerable customer	Households struggling financially	Non-household customers	Household and non-household customers
2022-23							
Affordability for customers							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	1,055	433	58	198	896
Customers who have struggled to pay at least one of their household or non-household bills	%	2	71.93%	73.49%	91.61%	40.40%	66.08%
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1,055	433	58	198	896
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	46.59%	47.48%	80.37%	32.32%	43.94%
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1055	433	58	198	896
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	14.52%	13.83%	0.00%	33.84%	18.10%
Acceptability for customers							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	1,055	433	58	198	896
Customers responding that the proposed business plan is unacceptable	%	2	9.38%	10.15%	12.39%	10.61%	9.61%
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	1,055	433	58	198	896
Customers responding that the proposed business plan is acceptable	%	2	69.96%	72.00%	49.97%	83.33%	72.44%



Line description	Units	Decimal places	Affordability and acceptability of business plans				
			Water only customer (whole bill and both business plans)				
			Household customers	Household with Vulnerable customer	Households struggling financially	Non-household customers	Household and non-household customers
			2022-23				
<b>Affordability for customers</b>							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers who have struggled to pay at least one of their household or non-household bills	%	2	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
<b>Acceptability for customers</b>							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is unacceptable	%	2	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable	%	2	NA	NA	NA	NA	NA



Line description	Units	Decimal places	Affordability and acceptability of business plans				
			Water and wastewater customer (whole bill and whole business plan)				
			Household customers	Household with Vulnerable customer	Households struggling financially 2022-23	Non-household customers	Household and non-household customers
<b>Affordability for customers</b>							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	1,043	414	121	204	838
Customers who have struggled to pay at least one of their household or non-household bills	%	2	35.38%	34.52%	79.48%	39.22%	36.32%
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1,043	414	121	204	838
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	51.62%	51.83%	86.00%	32.84%	47.03%
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1043	414	121	204	838
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	14.01%	14.63%	2.44%	40.69%	20.53%
<b>Acceptability for customers</b>							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	1,043	414	121	204	838
Customers responding that the proposed business plan is unacceptable	%	2	15.05%	14.12%	30.49%	12.75%	14.49%
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	1,043	414	121	204	838
Customers responding that the proposed business plan is acceptable	%	2	71.79%	71.21%	51.15%	81.37%	74.13%



Line description	Units	Decimal places	Affordability and acceptability of business plans				
			Wastewater only customer (wastewater bill and wastewater only business plan)				
			Household customers	Household with Vulnerable customer	Households struggling financially	Non-household customers	Household and non-household customers
			2022-23				
<b>Affordability for customers</b>							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers who have struggled to pay at least one of their household or non-household bills	%	2	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
<b>Acceptability for customers</b>							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is unacceptable	%	2	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable	%	2	NA	NA	NA	NA	NA



Line description	Units	Decimal places	Affordability and acceptability of business plans				
			Wastewater only customer (whole bill and both business plans)				
			Household customers	Household with Vulnerable customer	Households struggling financially	Non-household customers	Household and non-household customers
			2022-23				
<b>Affordability for customers</b>							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers who have struggled to pay at least one of their household or non-household bills	%	2	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	NA	NA	NA	NA	NA
<b>Acceptability for customers</b>							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is unacceptable	%	2	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	NA	NA	NA	NA	NA
Customers responding that the proposed business plan is acceptable	%	2	NA	NA	NA	NA	NA



Line description	Units	Decimal places	Affordability and acceptability of business plans				
			All customers (weighted combination)				
			Household customers	Household with Vulnerable customer	Households struggling financially	Non-household customers	Household and non-household customers
			2022-23				
<b>Affordability for customers</b>							
Customers who have struggled to pay at least one of their household or non-household bills (Unweighted base)	nr	0	1,048	421	97	202	860
Customers who have struggled to pay at least one of their household or non-household bills	%	2	49.40%	49.47%	84.13%	39.67%	47.74%
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1,048	421	97	202	860
Customers expecting to find it difficult to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	49.69%	50.16%	83.84%	32.64%	45.84%
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30 (Unweighted base)	nr	0	1,048	421	97	202	860
Customers expecting to find it easy to afford to pay their proposed water and sewerage bill for the years 2025-30	%	2	14.21%	14.32%	1.50%	38.06%	19.60%
<b>Acceptability for customers</b>							
Customers responding that the proposed business plan is unacceptable (Unweighted base)	nr	0	1,048	421	97	202	860
Customers responding that the proposed business plan is unacceptable	%	2	12.87%	12.60%	23.55%	11.93%	12.62%
Customers responding that the proposed business plan is acceptable (Unweighted base)	nr	0	1,048	421	97	202	860
Customers responding that the proposed business plan is acceptable	%	2	71.09%	71.51%	50.70%	82.12%	73.48%







Author: Kat Allen /Rebecca Crinson

Figure check: Ross Palmer

Report check: xxxxx

Final sign off: xxxxx