

Appendix 1.1.A - Social tariff

Wessex Water

September 2018



Wessex Water

YTL GROUP

Business plan section	Supporting document
Board vision and executive summary	
1 Engaging customers	1.1 Summary of research findings
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	1.3 Customer participation and behavioural engagement strategy
2 Addressing affordability and vulnerability	
3 Delivering outcomes for customers	
4 Securing long term resilience	
5 Markets & innovation: wholesale	
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Pension Credit Social Tariff

Customer Acceptability Research Findings

4th November 2015



Business Context

- Wessex Water and Bristol Water operate their assistance programme jointly as part of their shared billing operation.
- Wessex Water has set up an expert advisory group to guide and progress its work. The advisory group supports expanding the social tariff to include older customers on low incomes. Bristol Water are equally keen to broaden their support to these customers.

Research Context

- In 2011/12 Wessex Water conducted qualitative customer research to determine eligibility criteria for its social tariffs.
- In 2012 Wessex Water and Bristol Water conducted quantitative research to provide evidence for the level of contribution (cross subsidy) the wider customer body were willing to pay.
- Wessex Water and Bristol Water are now proposing to increase eligibility of its Assist tariff to offer pensioners on low incomes (specifically those in receipt of Pension Credit) a 20% bill reduction.

Research Objectives

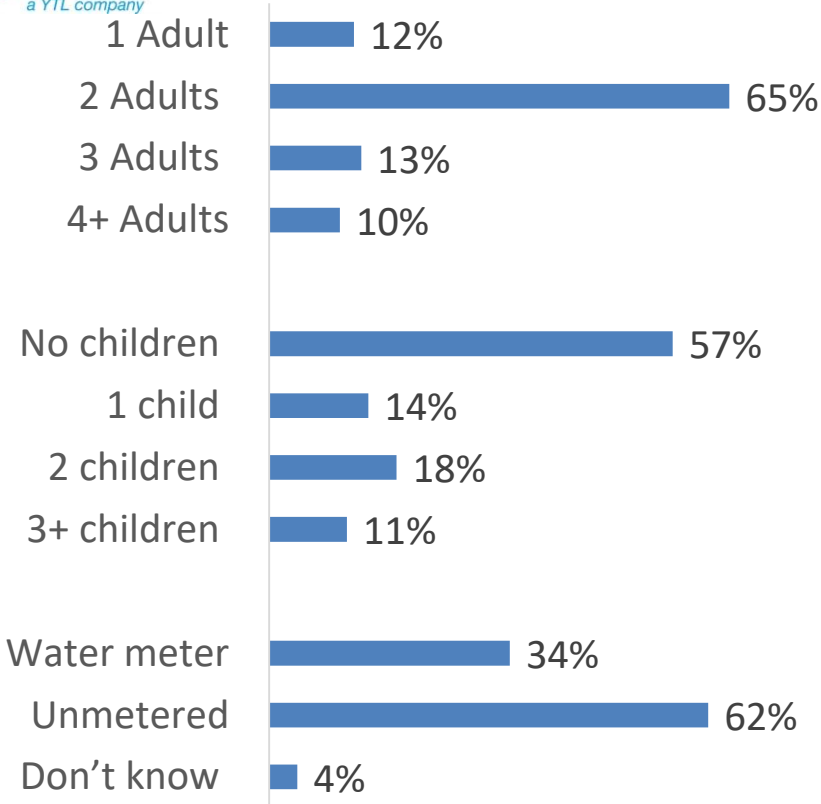
- To understand customers' attitudes (from both the Bristol/Wessex region and the Wessex only region) to the proposal to offer pensioners on low incomes a discount of 20%.
- To measure the acceptability of the anticipated cross subsidy.

- A telephone survey amongst Wessex Water and Bristol Water customers was conducted between 29th September and 21st October 2015.
- Quotas, based on the latest 2011 Census population estimates were set for region, age, gender and socio-economic group.
- A total of 433 interviews were conducted including 209 in the Bristol Water region.
- The data has been weighted to ensure the final sample is representative.

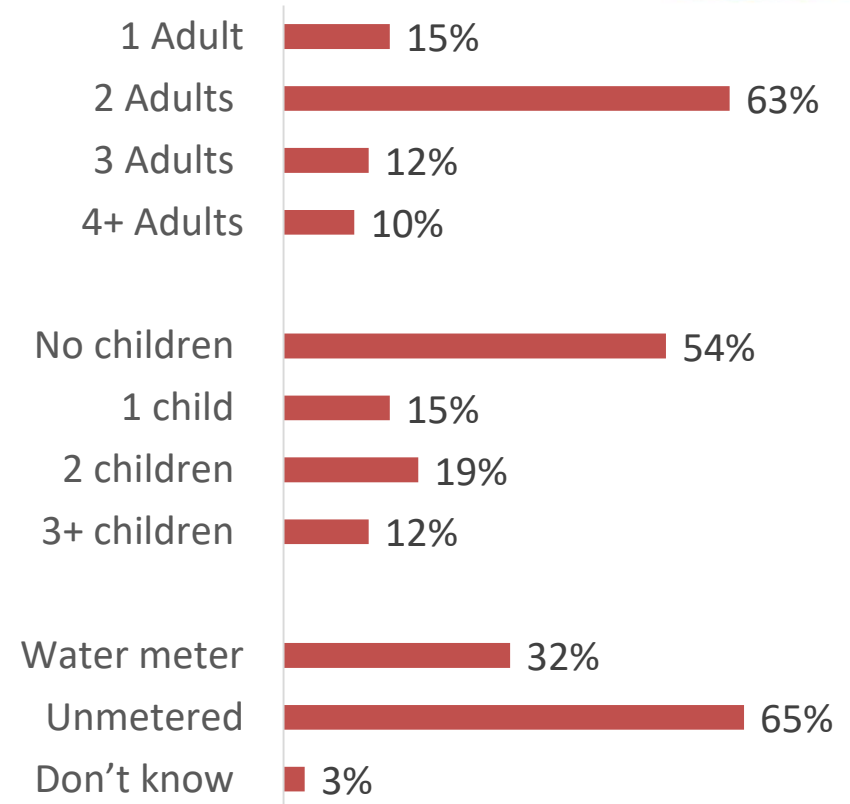
		Wessex Total				Bristol			
		Unweighted N	Unweighted %	Weighted N	Weighted %	Unweighted N	Unweighted %	Weighted N	Weighted %
Age	18-34	107	25%	112	28%	50	24%	56	28%
	35-54	145	33%	136	34%	79	38%	68	34%
	55+	181	42%	152	38%	80	38%	76	38%
SEG	AB	109	25%	100	25%	58	28%	50	25%
	C1	131	30%	104	26%	58	28%	52	26%
	C2	97	22%	80	20%	50	24%	40	20%
	DE	51	12%	76	19%	25	12%	38	19%
	Refused	45	10%	40	10%	18	9%	20	10%
Gender	Male	213	49%	196	49%	98	47%	98	49%
	Female	220	51%	204	51%	111	53%	102	51%



Wessex Water (433)



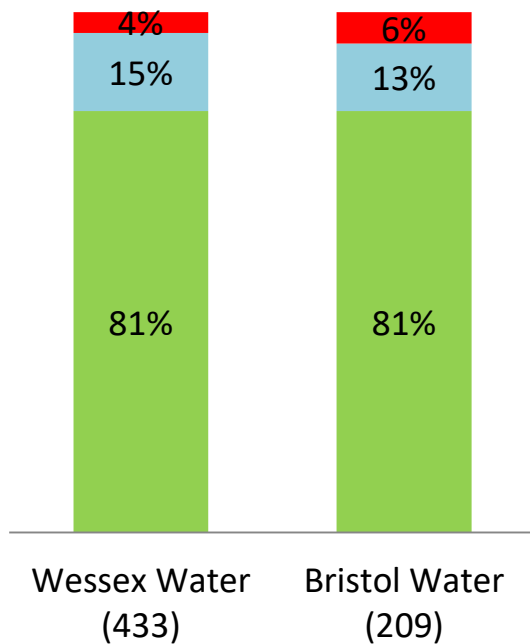
Bristol Water (209)



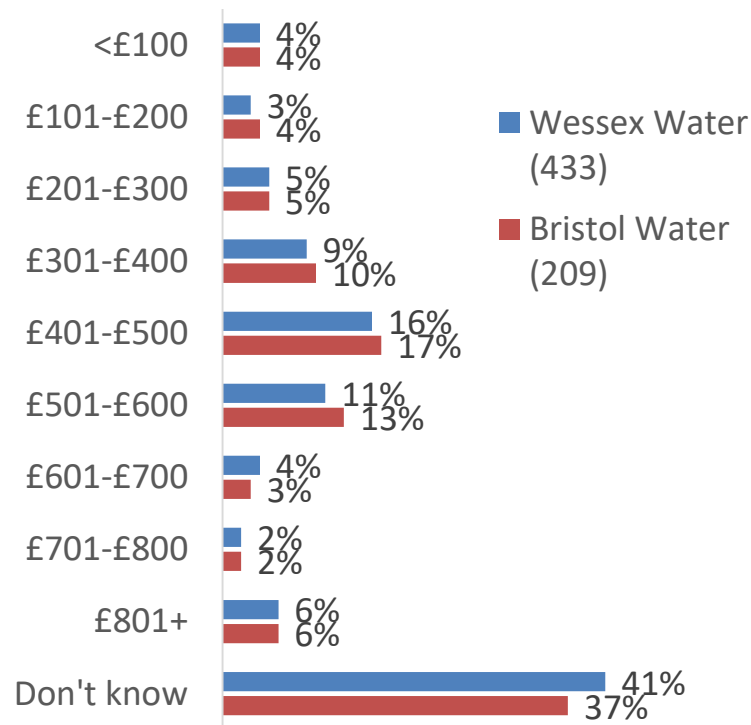
- The vast majority of customers have more than one adult in the household and just under half have children under 18 years in the household.
- Around a third have a water meter.

Q. Which of the following best describes your ability to pay your water bill?

- It is always difficult to find the money
- It is sometimes difficult to find the money
- I can always pay without difficulty

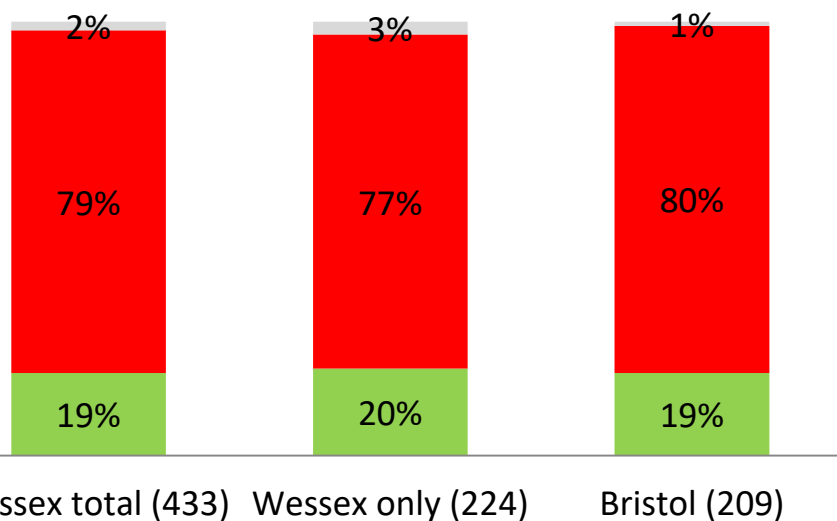


Q. Roughly how much do you think you currently pay combining your water supply and sewage services?



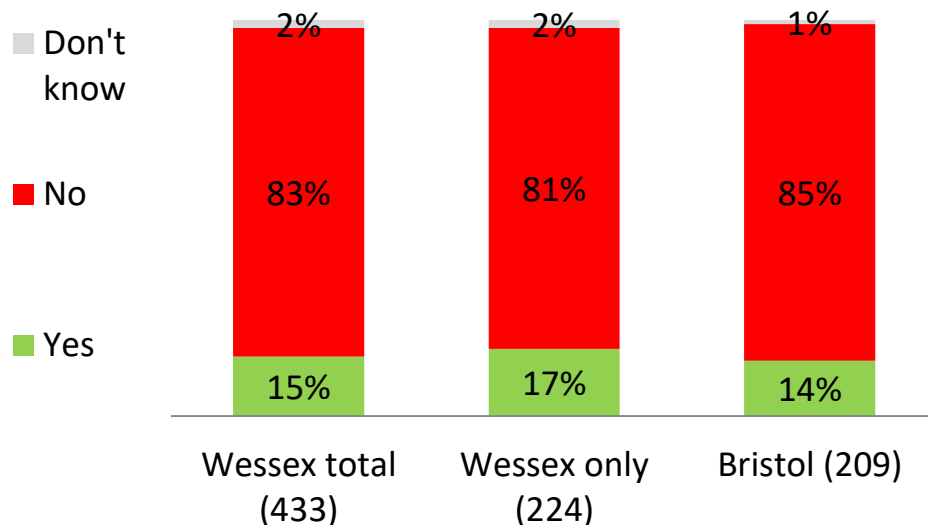
- Four in five customers can pay their bill without difficulty.
- Those who are most likely to 'sometimes' have difficulty paying their bills include: the 18-34yrs age group; those households with children; and DE households (rises to around one in five).
- Around two in five are unable to estimate the size of their bill. **The average bill estimates are £474 for Wessex Water customers and £459 for Bristol Water customers.**

Q. Water companies offer discounted bills to certain customers who have a low income and are struggling financially. Before today, were you aware that water companies offer these special rates? Base: All



Q. Before today were you aware that Wessex Water and Bristol Water offer these special rates? Base: All

Base: All



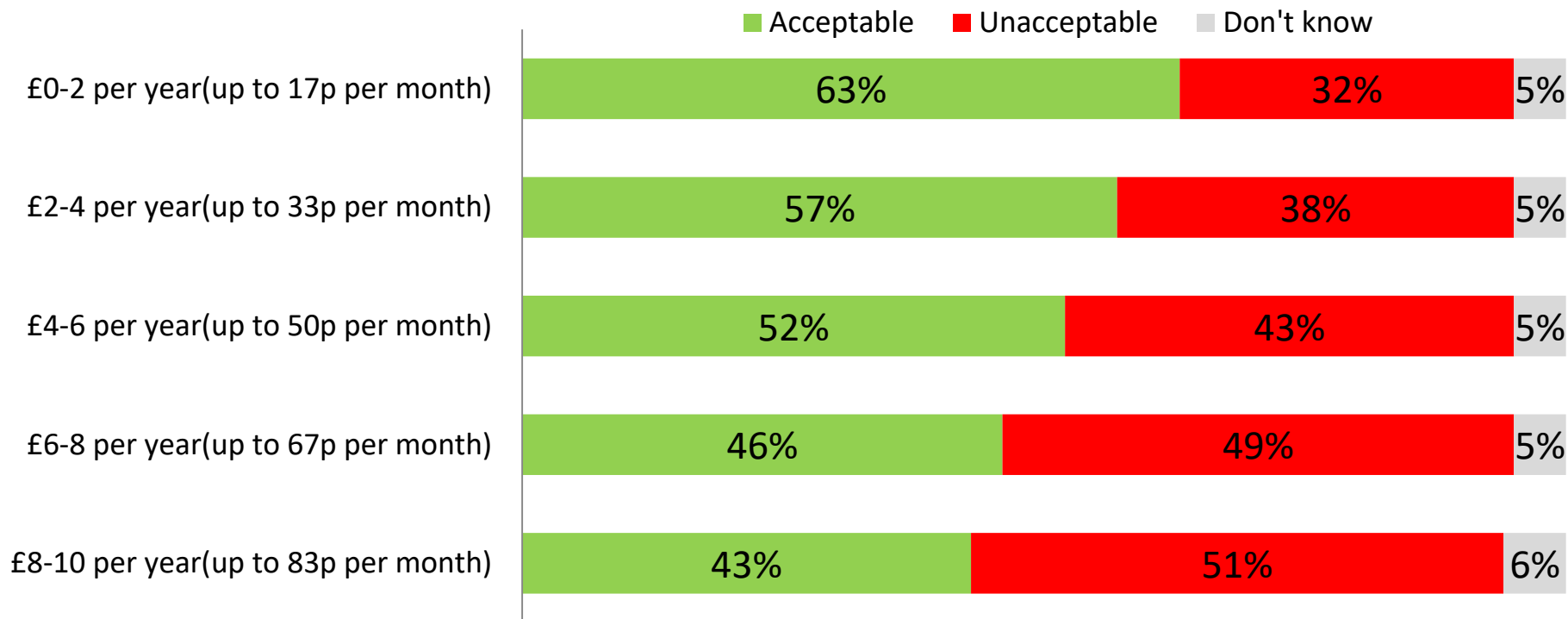
- Around one in five customers are aware that water companies offer special rates to customers on low incomes.
- Fewer are aware specifically that Wessex Water and Bristol Water offer special rates (17% and 14% respectively).
- Awareness is lower amongst customers from C2DE socio-economic groups - 90% of whom are not aware that Wessex Water and Bristol Water offer these rates.

All respondents were provided with the following background information about special tariffs. Interviewers also asked respondents whether they wanted any of the information repeated or clarified.

“Thinking about the special rates that Wessex Water and Bristol Water offer, we know that pensioners on low incomes are much less likely to take these up, even though most customers agree that they should be helped. As a consequence Wessex Water and Bristol Water are proposing to introduce a new lower rate tariff which will give pensioners on low incomes who receive pension credit a 20% discount or around £80 a year off their bills. Wessex Water and Bristol Water will cover the extra administration costs of this, but the proposal would mean that other customers will pay a small amount more on their bills.”



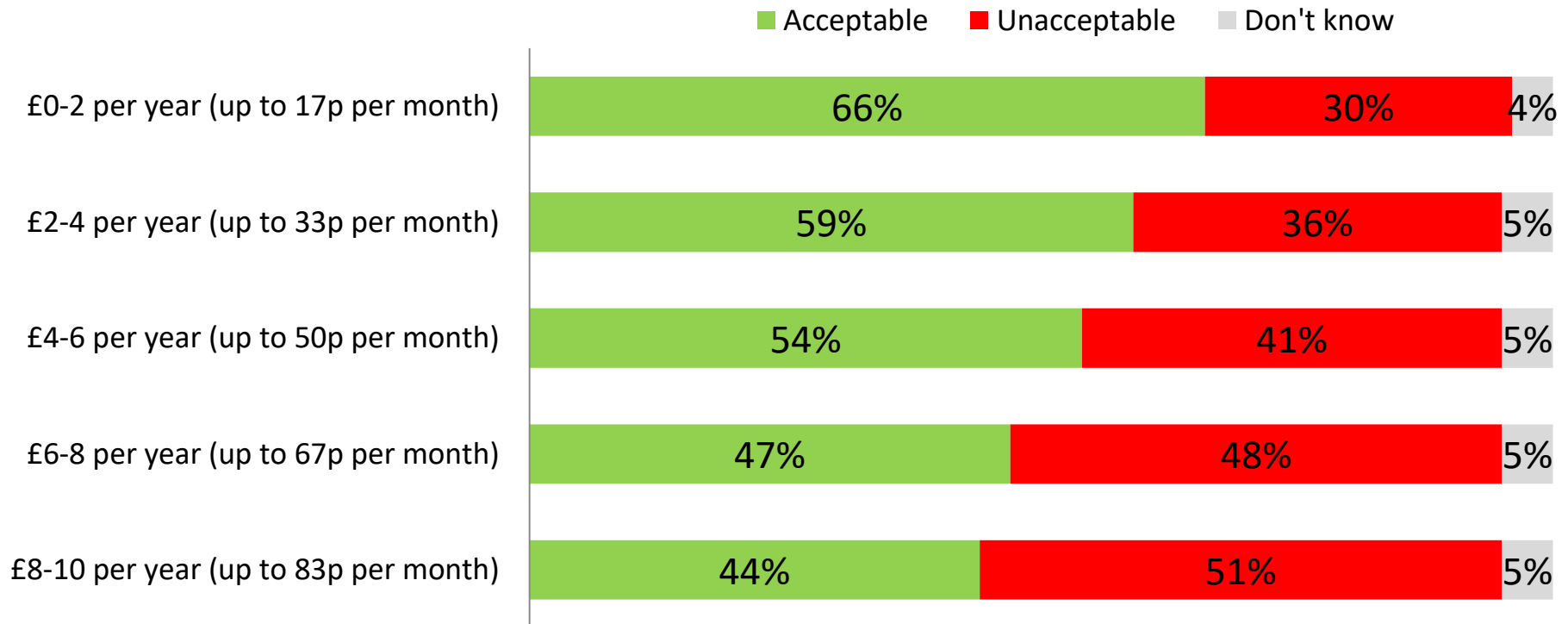
Q. The amount the industry regulator considers would be reasonable for a water company to increase the bills of other customers is £6 a year or 50p a month, providing customers find this broadly acceptable. With this in mind, are the following increases to your bill to support this special tariff for pensioners on low incomes acceptable or unacceptable to you? Base: All Wessex Water customers (433)



- Around three in five (63%) Wessex Water customers would find an increase of up to £2 a year to support a Pension Credit social tariff acceptable.
- Acceptability amongst customers decreases as the proposed bill rise increases - two in five (43%) would find an increase of £8-10 acceptable.



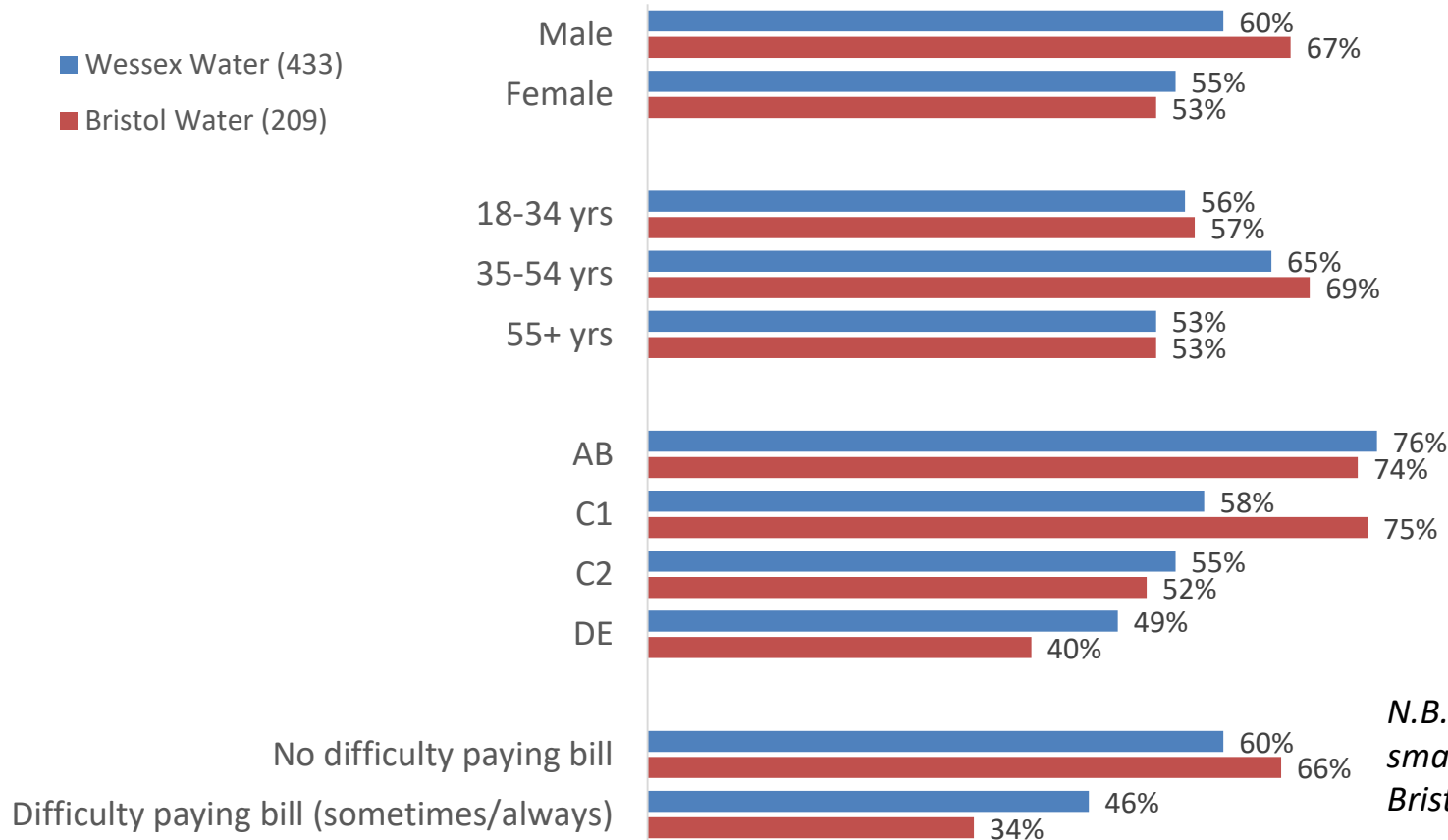
Q. The amount the industry regulator considers would be reasonable for a water company to increase the bills of other customers is £6 a year or 50p a month, providing customers find this broadly acceptable. With this in mind, are the following increases to your bill to support this special tariff for pensioners on low incomes acceptable or unacceptable to you? Base: All Bristol Water customers (209)



- Two thirds (66%) of Bristol Water customers would find an increase of up to £2 a year to support a Pension Credit social tariff acceptable.
- Acceptability amongst customers decreases as the proposed bill rise increases - two in five (44%) would find an increase of £8-10 acceptable.

- The groups of customers who are more likely to find a £2-£4 bill rises acceptable are: men, those from higher socio-economic groups and those in the middle 35-54 year age band.
- Those who are more likely to find the bill rises unacceptable are: those who sometimes have difficulty paying their bills, those over 55+ years.

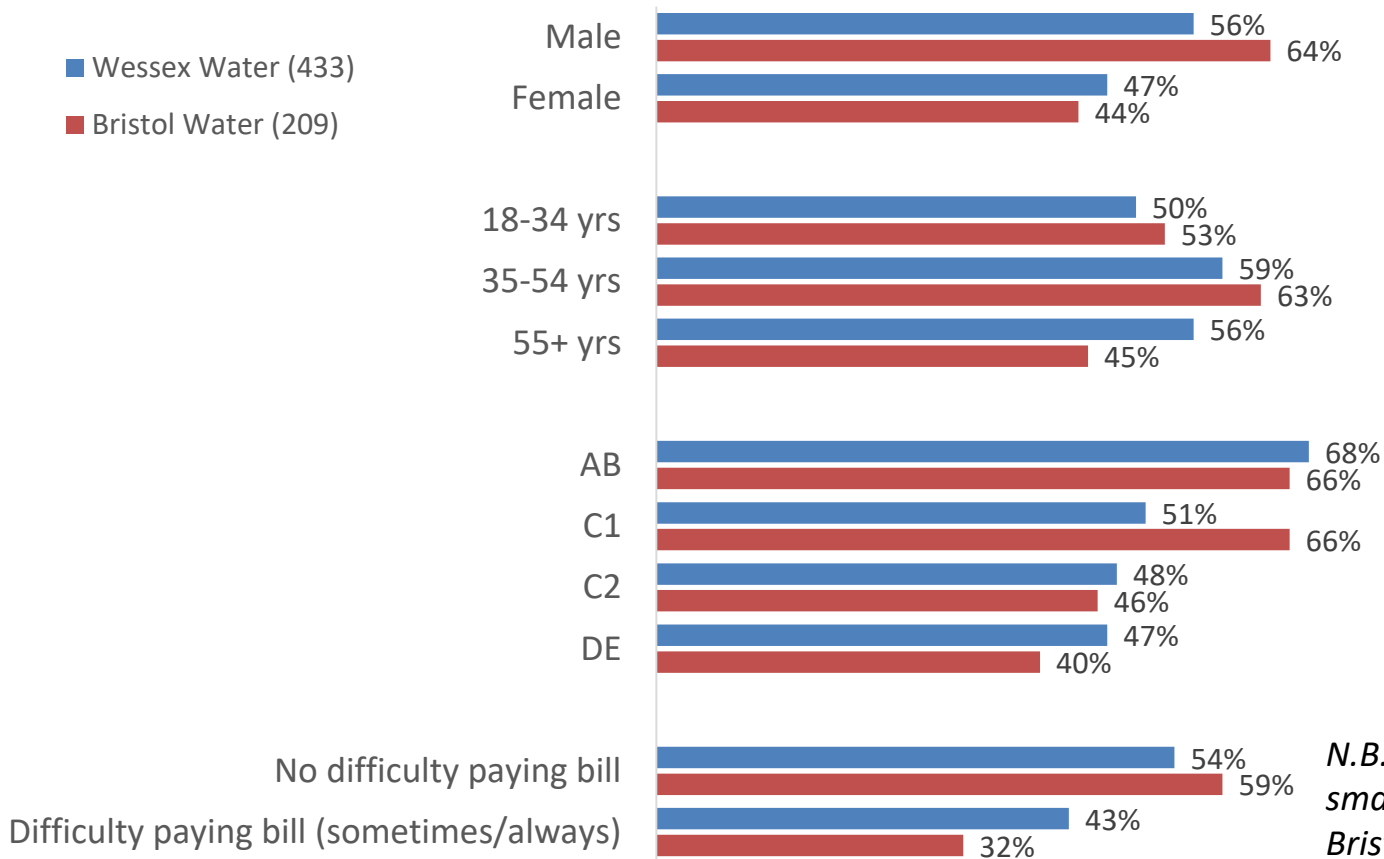
Acceptability of £2-£4 a year increase to support pension credit tariff?



N.B. Caution due to small base sizes for Bristol Water sub-group

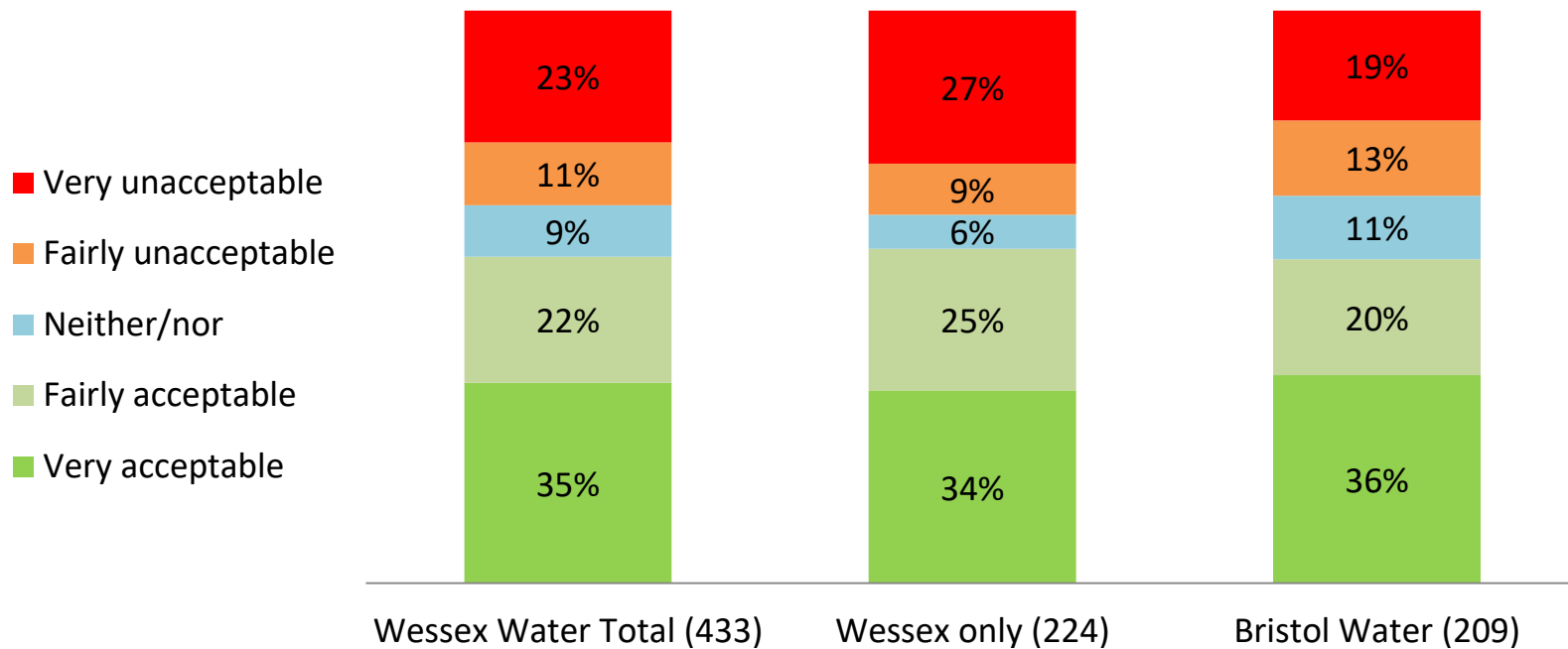
- The groups of customers who are more likely to find the bill rises acceptable are: men, those from higher socio-economic groups and those in the middle 35-54 year age band.
- Those who are more likely to find the bill rises unacceptable are: those who sometimes have difficulty paying their bills, those over 55+ years.

Acceptability of £4-£6 a year increase to support pension credit tariff?



N.B. Caution due to small base sizes for Bristol Water sub-group

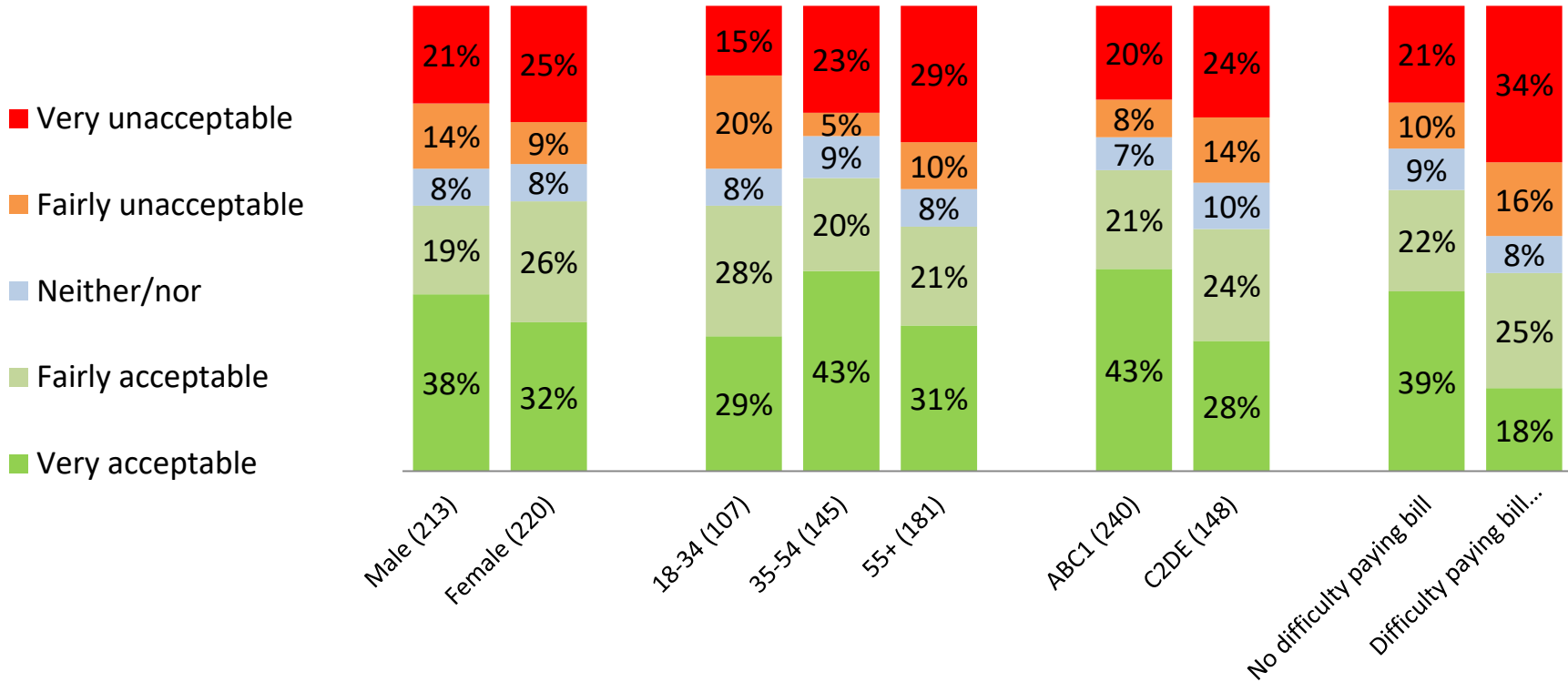
Q. Wessex Water and Bristol Water plan to offer a bill reduction of 20% to the 70,000 pensioners on low incomes who receive pension credit. Age UK, the charity who represent the elderly in Britain, are supportive of this proposal. If all these pensioners take up the discount it would mean a maximum bill increase for other customers of 40p per month or £5 a year by 2020. How acceptable or unacceptable would you find this level of increase?



Around three in five customers find an increase of 40p per month or £5 a year acceptable to support a social tariff for pensioners on pension credit – 57% of Wessex Water customers and 56% of Bristol Water customers.



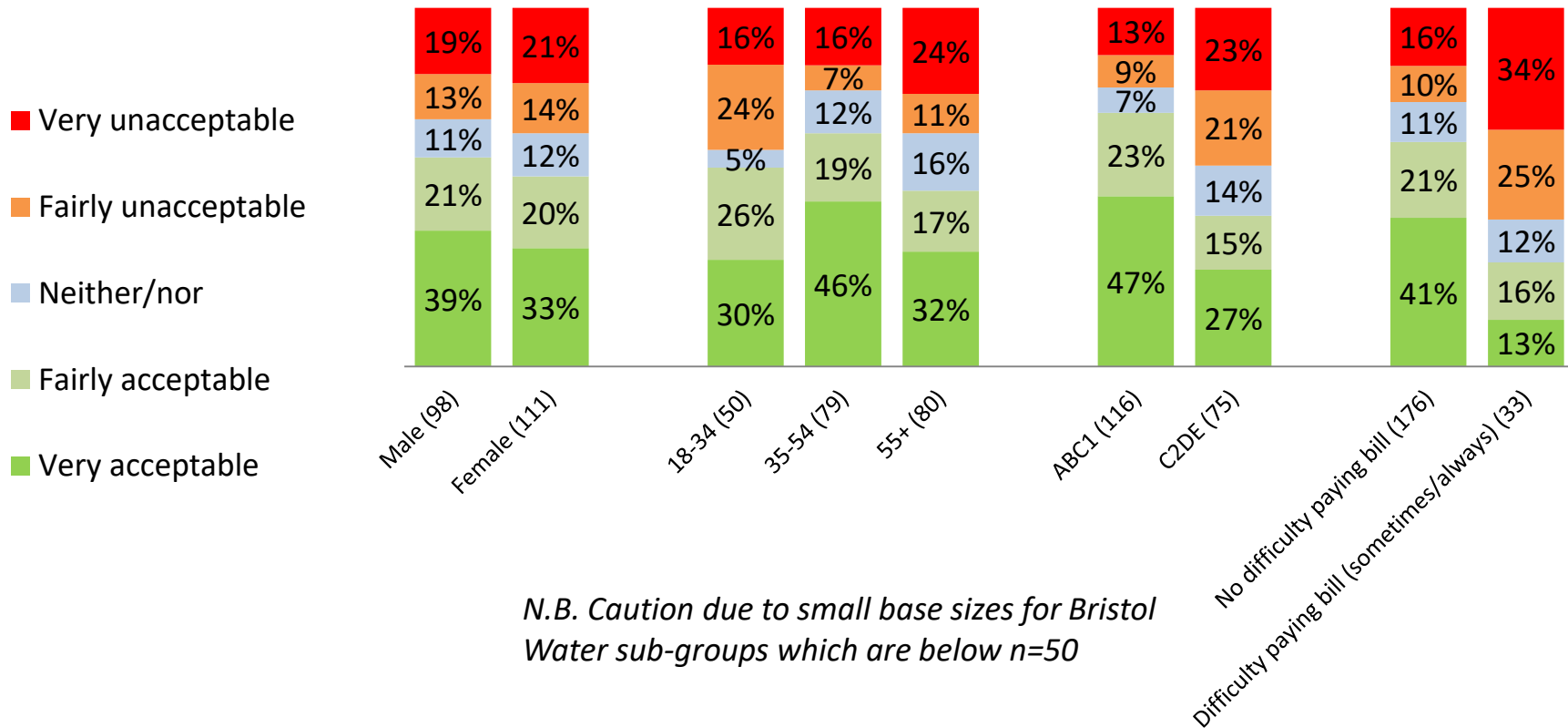
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Acceptability is higher amongst: those who have no difficulty paying their water bills; those in the higher socio-economic grades; and customers in the 35-54 age group.



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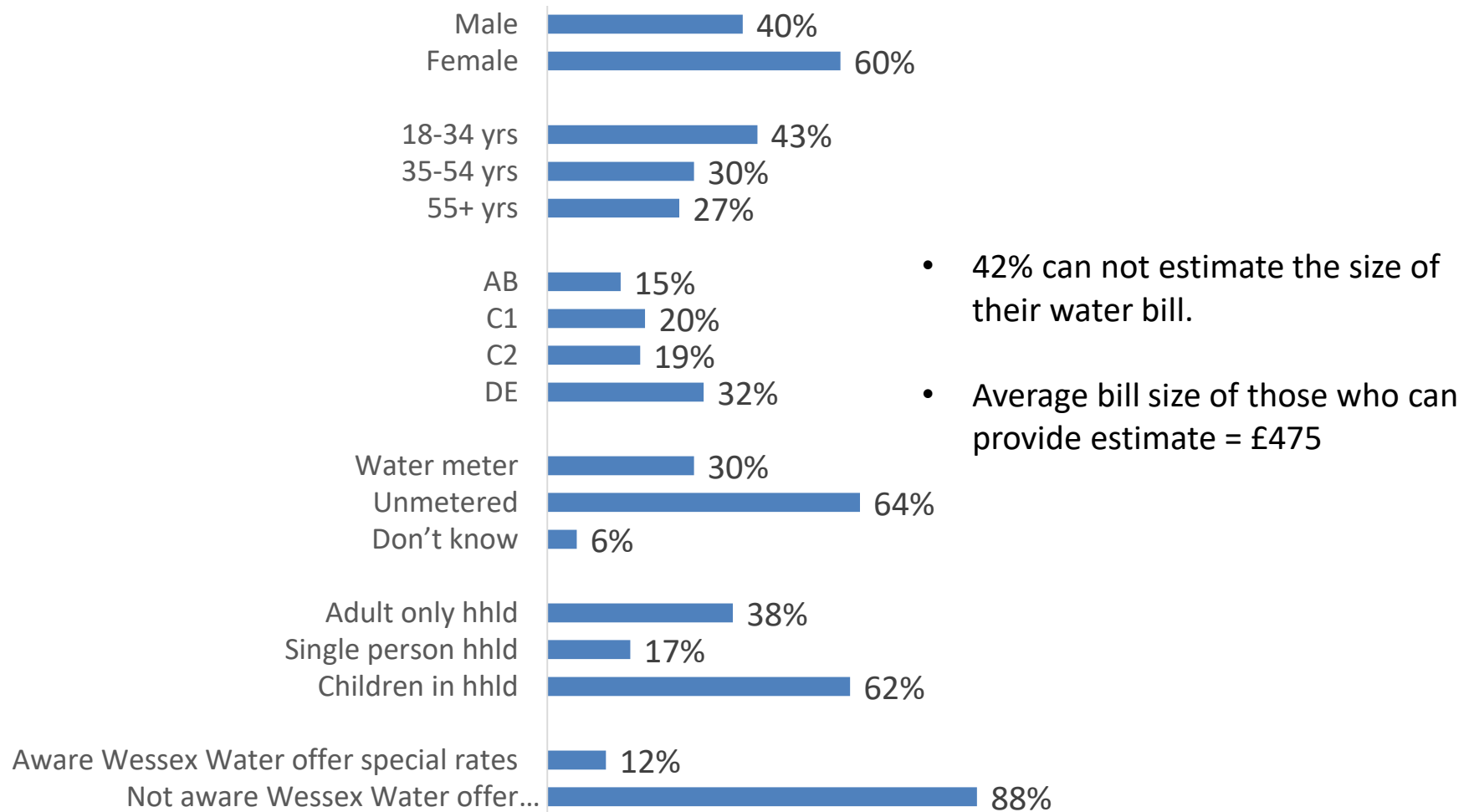


Acceptability is higher amongst: those who have no difficulty paying their water bills; those in the higher socio-economic grades; and customers in the 35-54 age group.



- 15% of Wessex Water customers say they ‘sometimes’ have difficulty paying
- 4% say they ‘always’ have difficulty paying

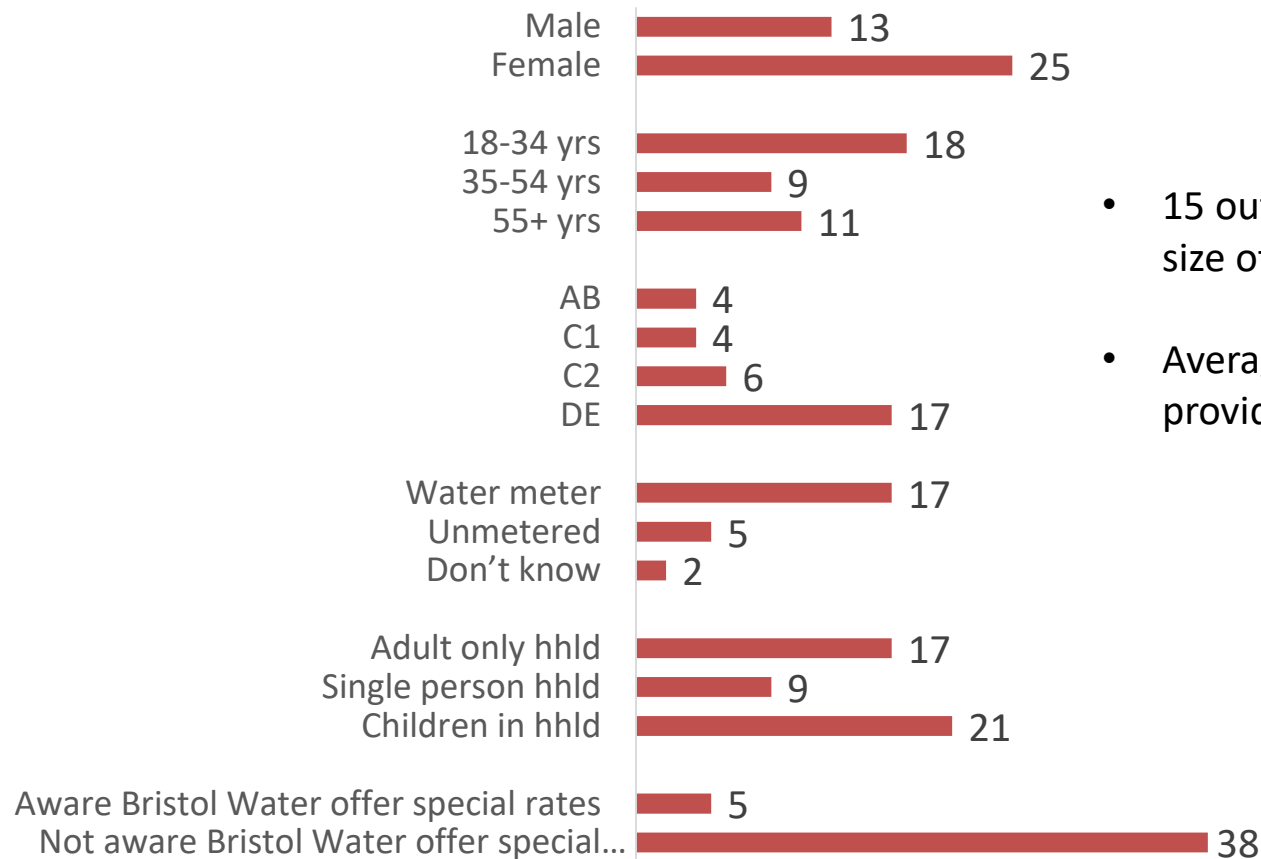
Profile of customers finding difficulty paying (n=74)





- 13% of Bristol Water customers say they ‘sometimes’ have difficulty paying
- 6% say they ‘always’ have difficulty paying
- Profile of these customers provided below – absolute numbers (not %s) provided due to small base size

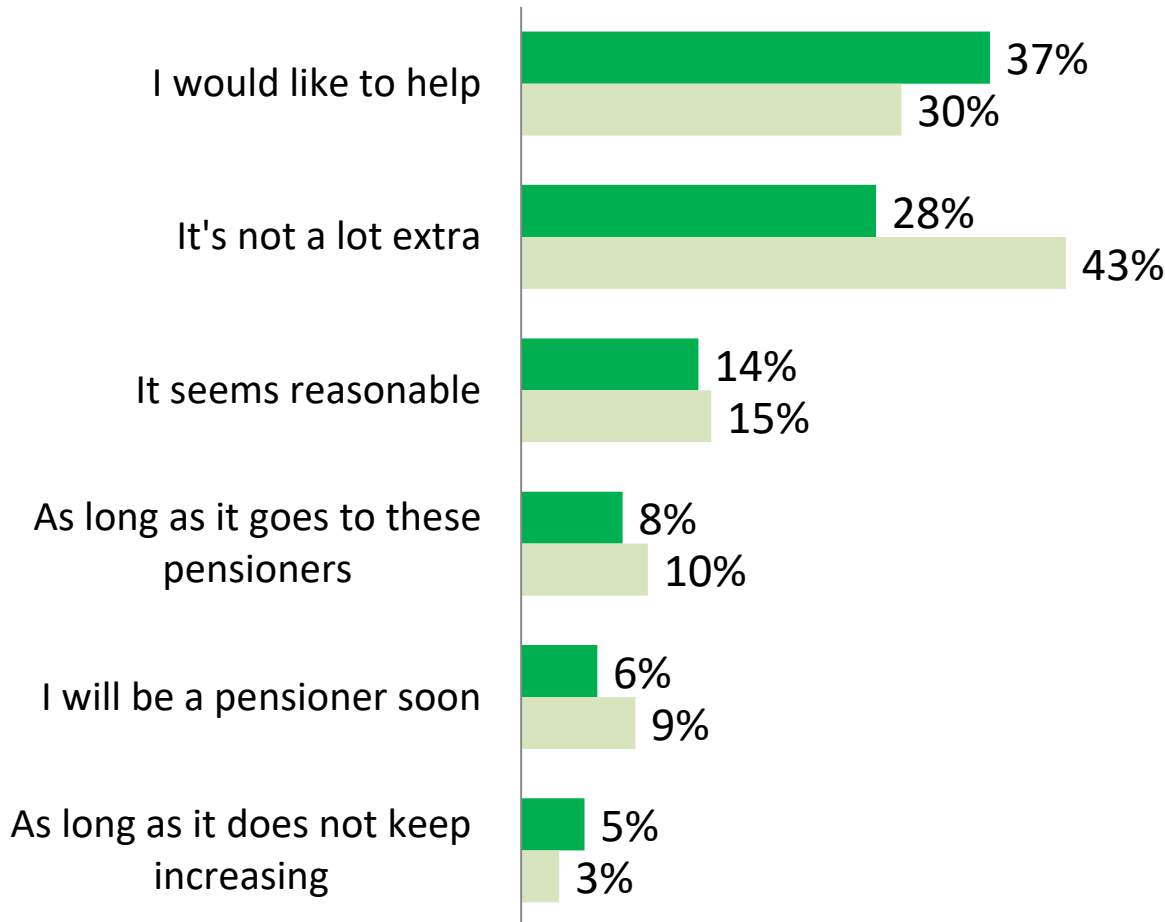
Profile of customers finding difficulty paying (weighted n=38)



- 15 out of 38 can not estimate the size of their water bill.
- Average bill size of those who can provide estimate = £438

Base: All customers who find the proposal acceptable

■ Wessex (248) ■ Bristol (121)



I think it's nice to help less fortunate people.

It's a small amount that would not be missed.

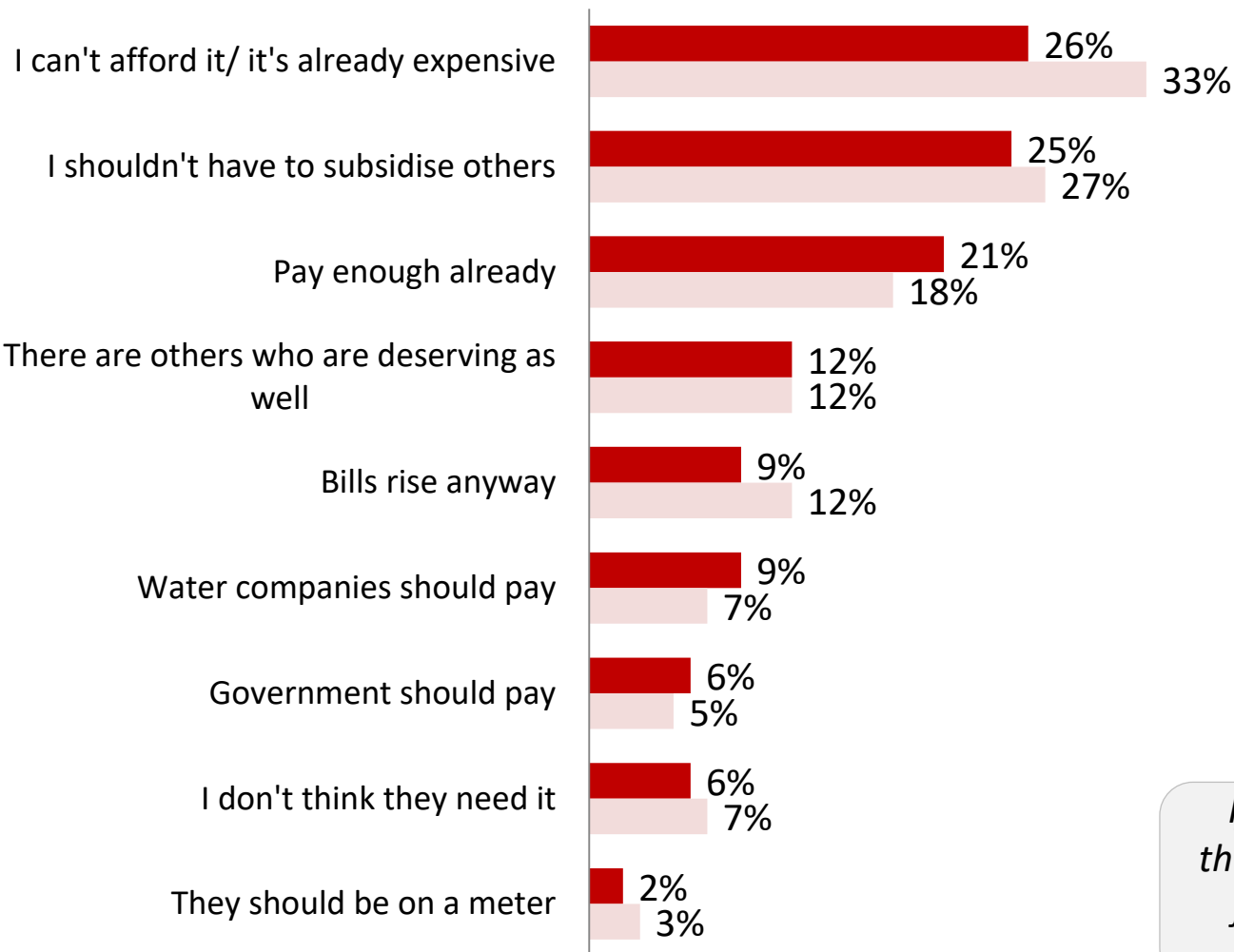
It's neither here nor there really.

It's a small amount as long as they were means tested I would not mind paying a little extra.

As long as there was evidence that they were getting this benefit it's not a lot of money to be missed.

Base: All customers who find the proposal unacceptable

■ Wessex (146) ■ Bristol (63)



I don't think they should get customers to cover the expenses of others.

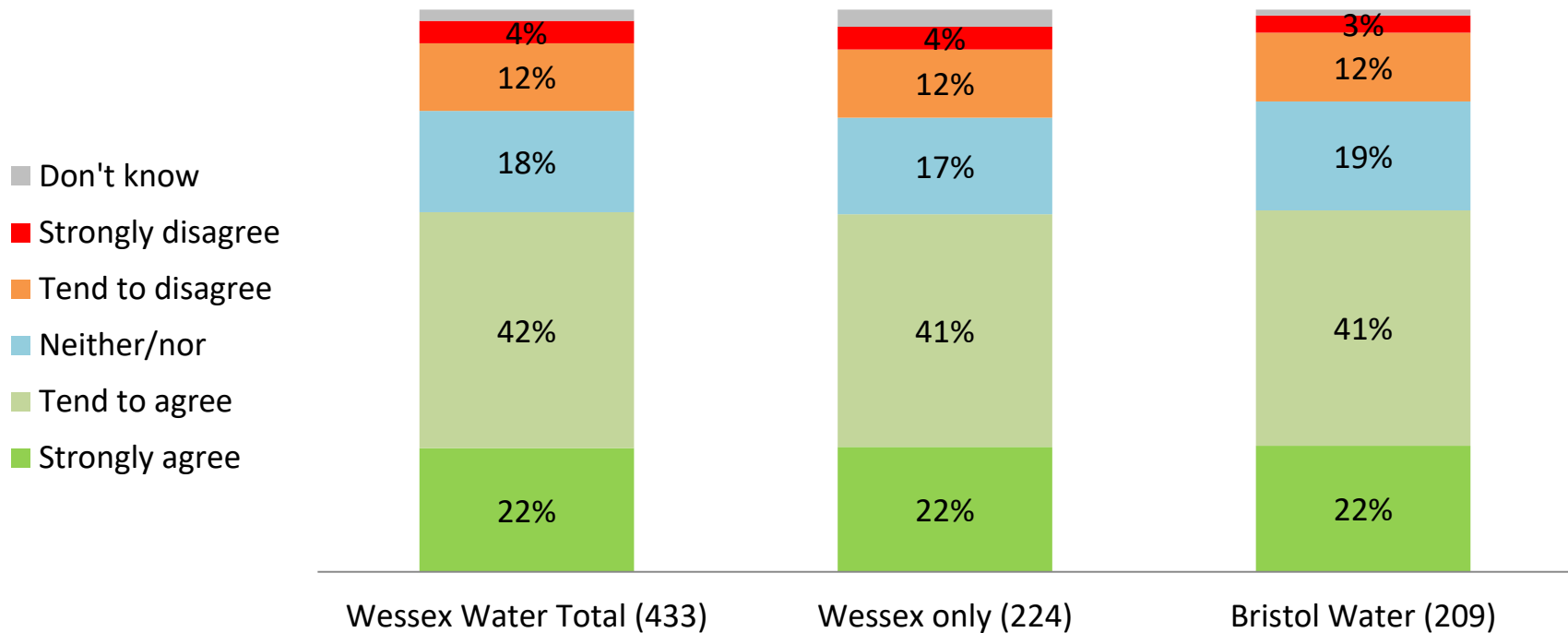
I am a pensioner, why should I pay for other pensioners?

Because the younger generation pay enough on other bills and should not have to compensate for the pensions.

I have to think about my household bills first.

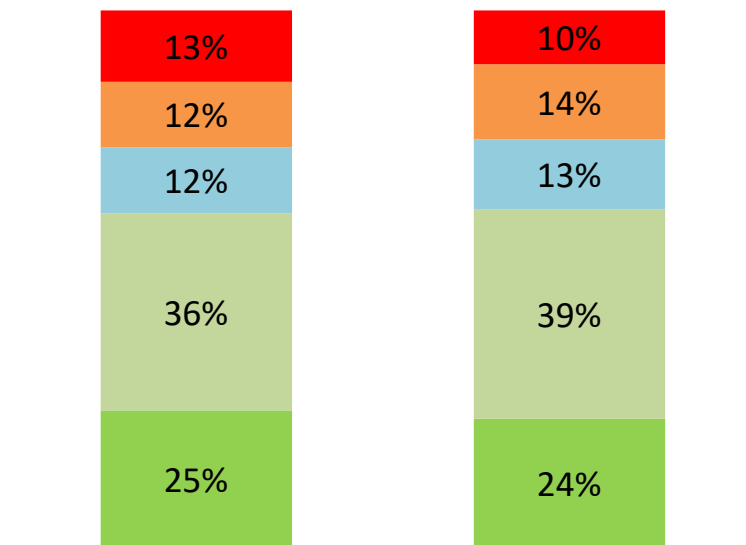
If they can do it for pensioners they should do it across the board for others that are struggling, people on low incomes etc.

Q. How much do you agree with the statement 'It is right that Wessex/Bristol Water are prioritising pensioners on low incomes'?

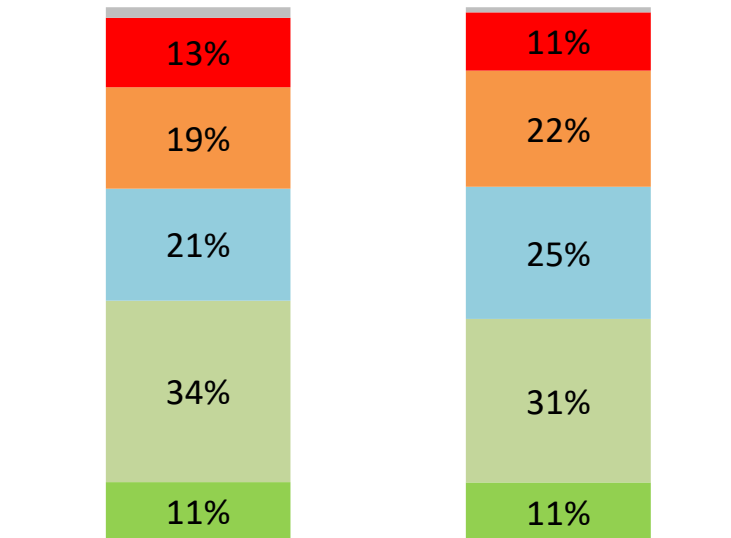


- Around two thirds of customers agree that Wessex Water and Bristol Water should prioritise pensioners who are on low incomes. Only around one in six disagree.
- ABC1 customers are most likely to agree.

Q. How much do you agree with the following statements about special tariffs?



■ Don't know
■ Strongly disagree
■ Tend to disagree
■ Neither/nor
■ Tend to agree
■ Strongly agree



Wessex Water (433) Bristol Water (209)

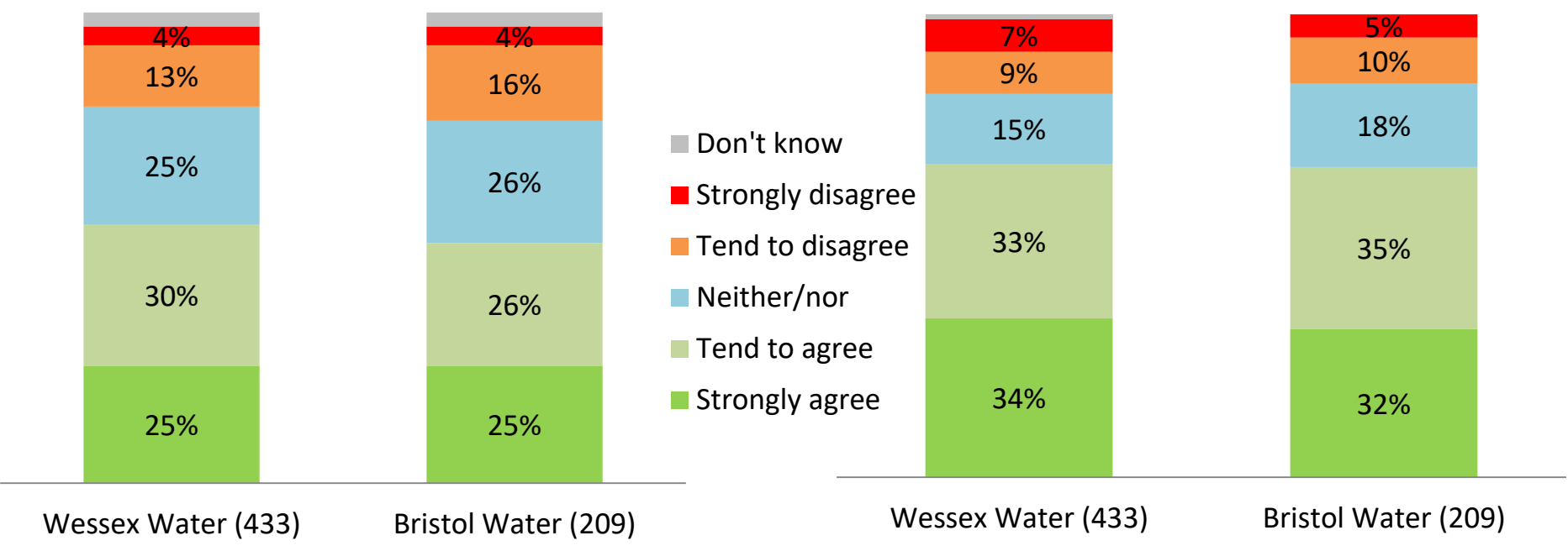
An extra 40p a month on my bill is not a significant increase

Wessex Water (433) Bristol Water (209)

Water customers should be willing to pay more to help pensioners on low incomes who are struggling to pay their bills

- Around three in five customers agree that 40p a month is not a significant increase to their bill (ABC1's are more likely to agree with this statement).
- However, fewer - around two in five - think customers should be willing to pay more to help pensioners on low incomes.

Q. How much do you agree with the following statements about special tariffs?



Water companies should cover all the costs of helping pensioners on low incomes themselves and not ask other customers to pay more

The Government, not water companies, should be helping pensioners on low incomes who are struggling to pay their bills

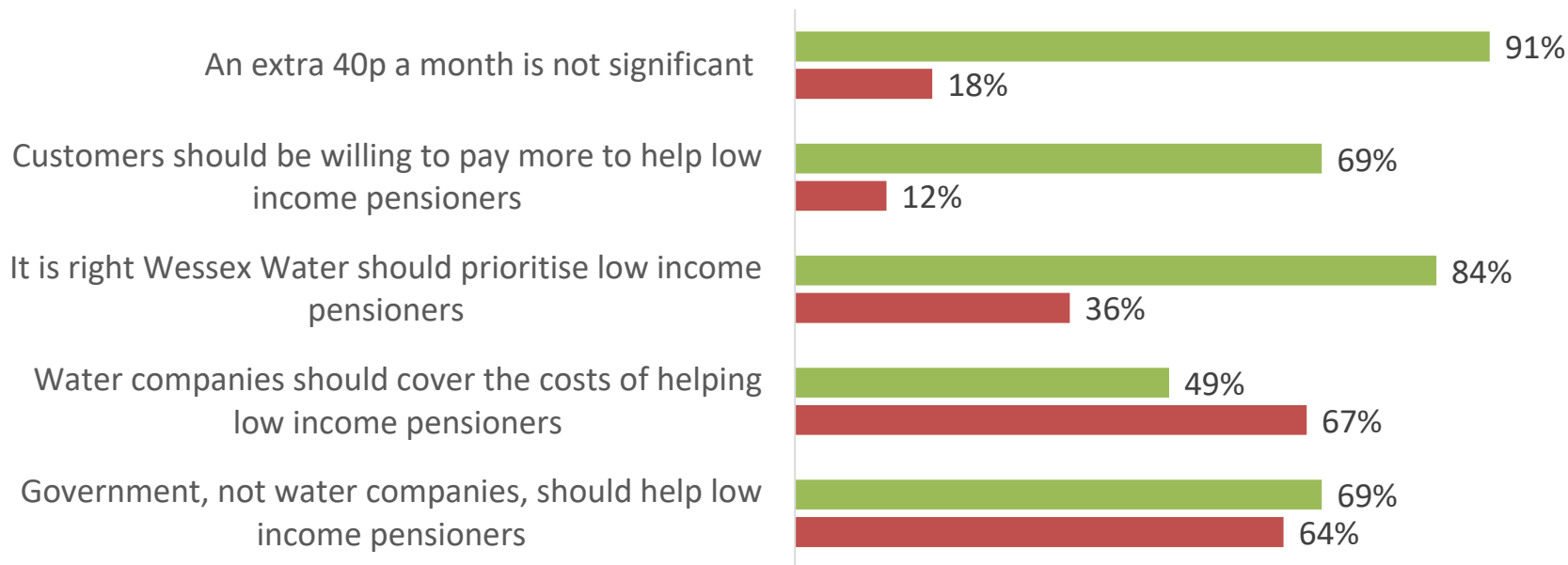
Just over half of customers think water companies should cover the costs of helping pensioners on low incomes rather than asking customers to pay more, although one quarter are undecided. A higher proportion – two thirds – think the government rather than water companies should help low income pensioners.

Q. How much do you agree with the following statements about special tariffs?



Wessex Water Customers
% who agree with each statement

■ Acceptable (248) ■ Unacceptable (146)



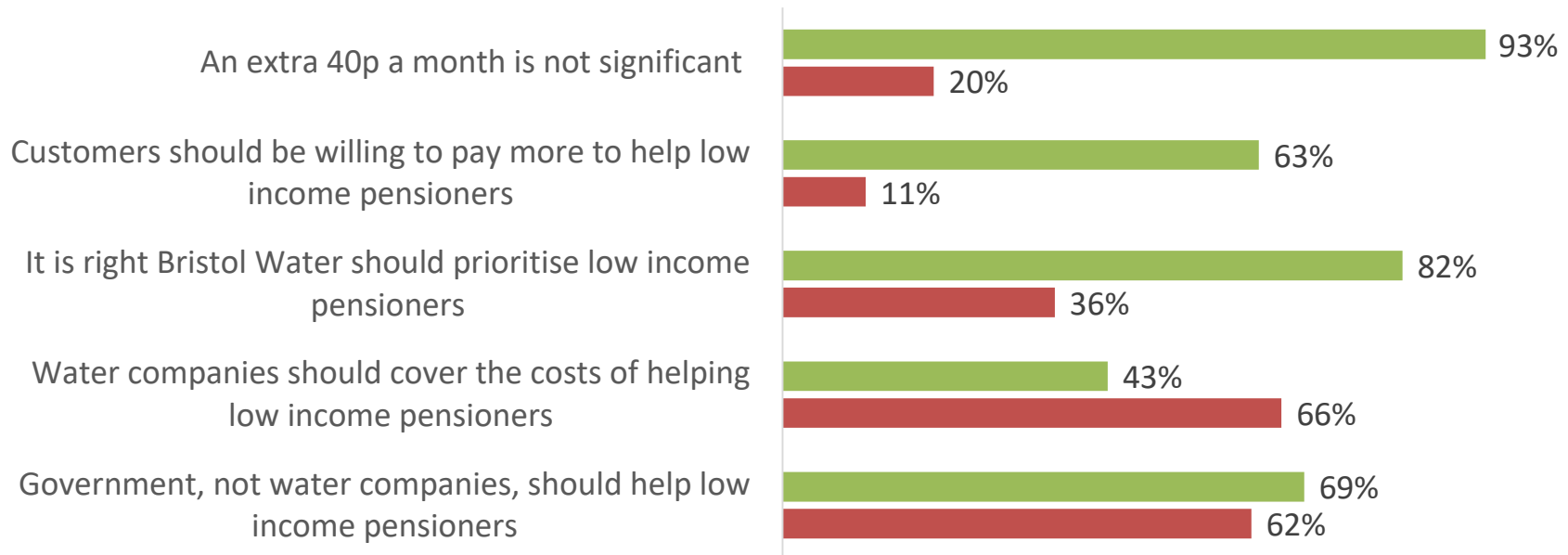
- Wessex Water customers who do not find the proposal acceptable are much less likely to agree that: 40p a month is not significant; that customers should be willing to pay more; and that it is right for Wessex Water to prioritise low income pensioners.
- They are also more likely to think water companies should cover the costs.

Q. How much do you agree with the following statements about special tariffs?



Bristol Water Customers
% who agree with each statement

■ Acceptable (121) ■ Unacceptable (63)



- Bristol Water customers who do not find the proposal acceptable are much less likely to agree that: 40p a month is not significant; that customers should be willing to pay more; and that it is right for Bristol Water to prioritise low income pensioners.
- They are also more likely to think water companies should cover the costs.

- Just over half of customers, in principle, would find a bill increase of between £4-£6 acceptable to support low income pensioners.
- When provided with the detailed proposals 59% of Wessex Water customers and 56% of Bristol Water customers find the pension credit social tariff acceptable.
- Those customers less likely to find the proposal acceptable are: those who currently have difficulty paying their bill (43%); lower socio-economic groups (52% C2DE); and older customers over 55+ years (52%).
- The main reasons for not accepting the proposals are affordability (and a feeling they pay enough already) and opposition to the principle of subsidising others. Customers who are not accepting are much less likely to think 40p a month is not a significant amount and that customers should be willing to pay more for others.

Social Tariffs

Quantitative Customer Research

Summary Presentation: October 2012



Research Objectives & Methodology

Background



Wessex Water commissioned an extensive piece of qualitative customer research in 2011 to understand attitudes to social tariffs. A social tariff proposal has now been developed based on these findings.

Objective: to provide evidence on the acceptability of Wessex Water's social tariff proposal:

- attitudes towards & acceptability of the social tariff proposals
- willingness to pay extra on bill to fund it

Methodology

- Telephone survey of 400 domestic customers (using Computer Aided Telephone Interviews)
- Quotas set for region: 200 Supply & Sewerage customers & 200 Sewerage only (in Bristol Water region)
- Quotas set for age, gender & social class
- Final data weighted to ensure representativeness of sample (based on latest 2011 NRS figures)
- Fieldwork dates: 24th-28th September 2012

	200
	202
TOTAL	402

Similar demographic profile for both Wessex & Bristol regions

Conclusions

Ultimately, three quarters of customers (74%) accept a bill increase of 50p per annum for these tariff proposals

However...

While customers support the principle of social tariffs for the less well off, the majority do not support the idea that customers should fund these via cross-subsidy: acceptance of the 50p/annum bill increase for most customers reflects the small sum involved

The research illustrates that customers are uncomfortable about the principle of cross-subsidy to fund social tariffs

- before knowing what the increase will be, around half say they are not willing to pay to expand the reach of the Assist Scheme (55%) nor to lower the WaterSure cap (57%)
- there is concern that though the principle is good, in practice the wrong people benefit (66% agree)
- the majority believe water companies should foot the bill of social tariffs (71% agree), and that the Government should be helping households struggling to pay (60%)

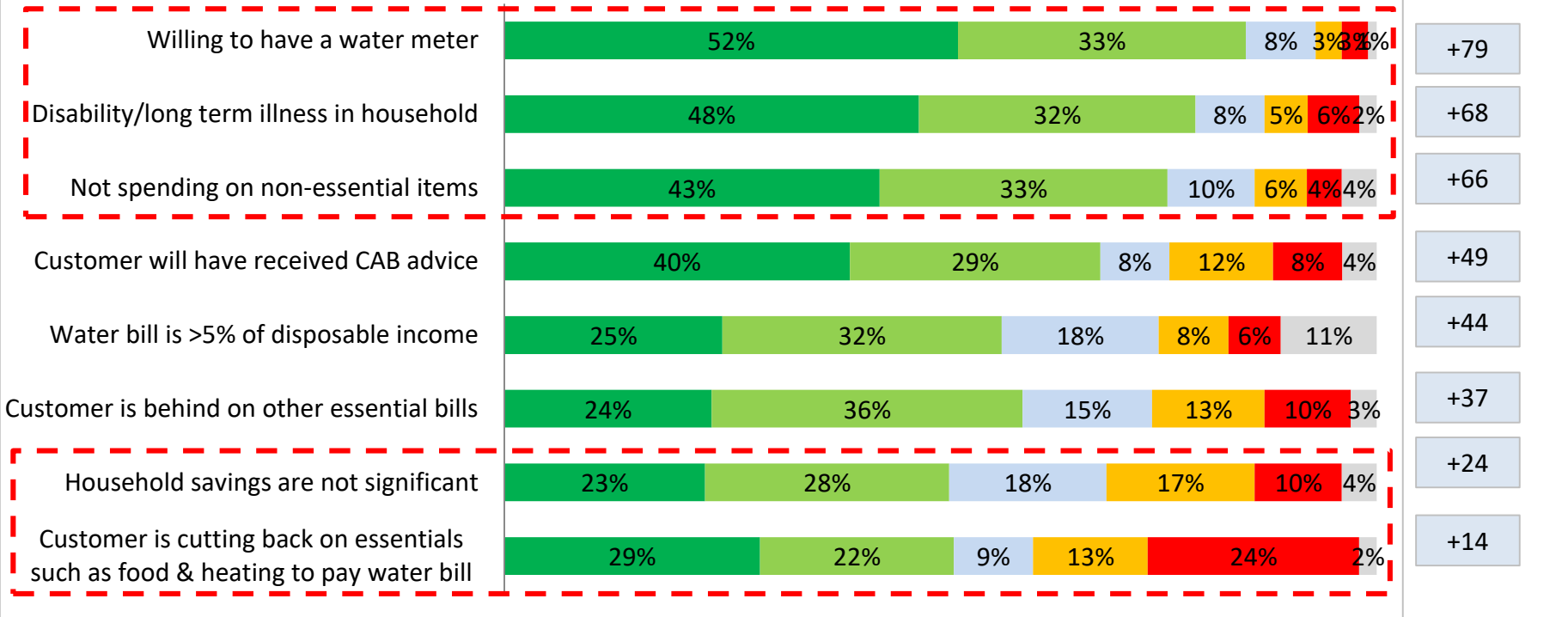
Despite these reservations:

- overall the 50p proposal is accepted even by the majority of those customers who initially said they would pay nothing (60% in the case of Assist, 58% for WaterSure)
- on balance, customers agree with the qualifying criteria for Assist, though divided about proposals to lower the WaterSure cap

Response to proposed **Assist** criteria

Q8 Do you support or oppose the criteria?

■ Strongly support
 ■ Tend to support
 ■ Neither/nor
 ■ Tend to oppose
 ■ Strongly oppose
 ■ Don't know



On balance customers support all of the proposed criteria.

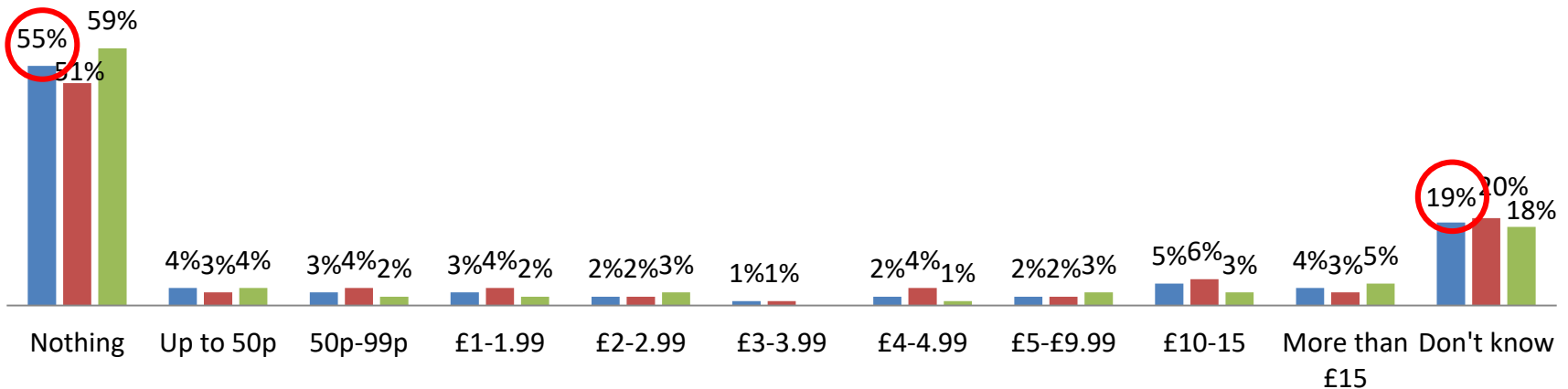
- Greatest agreement: criteria infer customer taking responsibility, or with illness/disability
- Least agreement: criteria that infer customer already suffering financially
- Those with affordability issues significantly less likely to support criteria re *willing to have a meter, not spending on non essentials, taking debt advice and cutting back on essentials* (because with them, they may not be eligible?)

Unprompted willingness to pay for expanded Assist Scheme

Q9 Wessex Water expects that all customers will have to have received debt advice from Citizen's Advice Bureau & that a majority of the other criteria will also apply before they lower the customers' bill. This will help an extra 6,000 households. Now that you know this, how much extra, if anything, would you be willing to pay on your annual household bill to support those on this Assist Scheme?

How much willing to pay for Assist tariff?

■ Total(402) ■ Wessex(200) ■ Bristol(202)

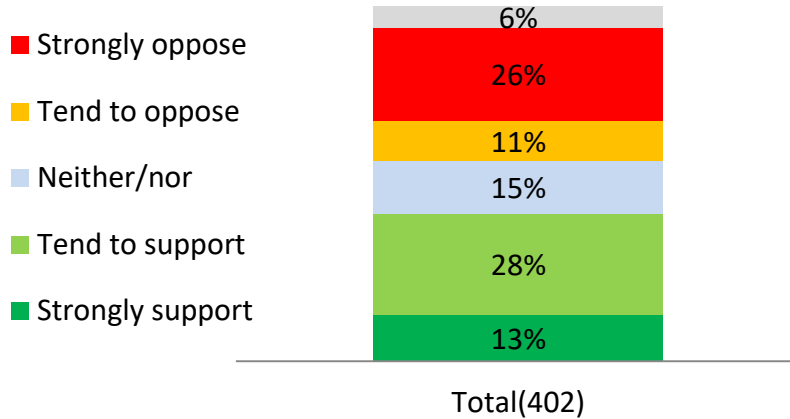


When asked unprompted how much they would be willing to pay, 55% of customers say they are not willing to pay.

- A further one in five (19%) are unable to say.
- Of those customers who felt able to comment the average annual amount suggested is **£2.00**

WaterSure: attitude to lowering the cap

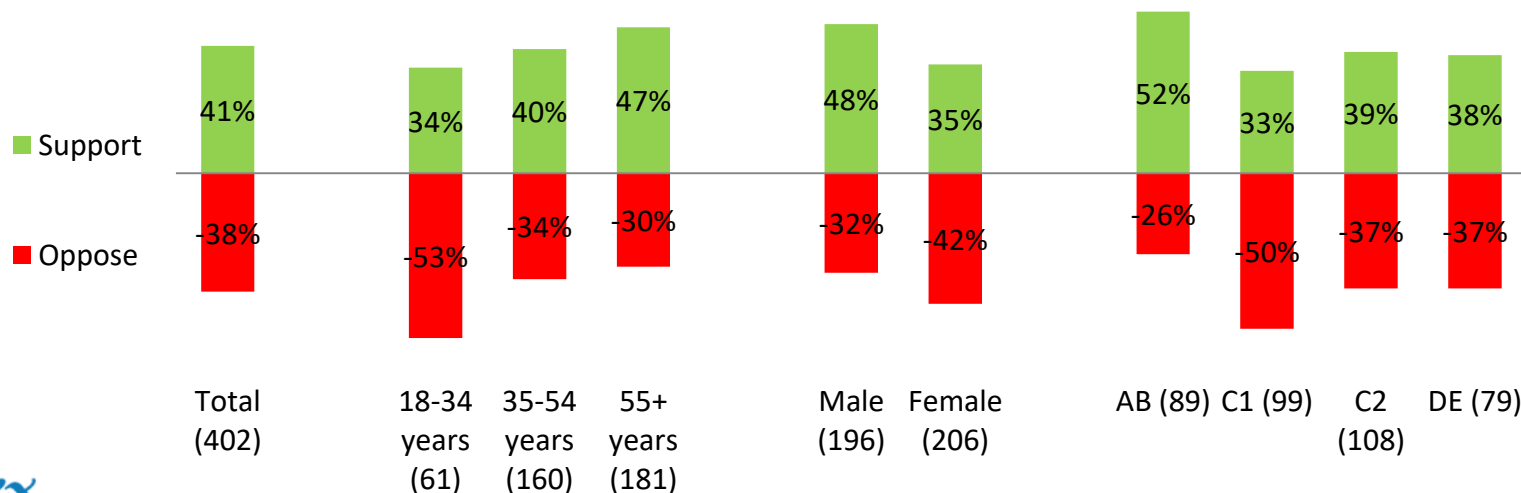
Q11 WaterSure: do you support or oppose the lowering of the cap?



Customers are divided over whether they support the lowering of the WaterSure cap: 41% support whereas 37% oppose it.

Support is strongest amongst men, older customers and those in social class AB. On balance younger (under 34 yrs), females and those in social class C1 oppose the lowering of the cap.

Q11 Do you support or oppose this change?



Reasons for opposing lowering the WaterSure cap

Reasons why support

1. Happy to help others in need/struggling
2. Good/fair to help others

Other reasons:

- *Happy to pay for people with disabilities/illness*
- *I support the idea, but don't want to pay more*
- *I'm struggling to pay*
- *I/we are on benefits/disabled*
- *Depends on how it works*
- *Happy if people in genuine need*

Reasons why oppose

1. Shouldn't have to pay for other people
2. I pay enough already/too expensive now
3. These people already receive benefits/support/enough money to pay

Other reasons:

- *I'm struggling to pay*
- *Should come from profits/shareholders*
- *We should all pay the same*
- *Government should pay*

"I think it is very fair that people not struggling can help by paying a bit more on their water bills each year."

"Would support people with a medical condition but not the rest."

"We're all struggling to pay bills so we shouldn't have to pay for others too."

"Do not want our bill to increase - we pay enough already."

"It would be good to help people that are struggling"

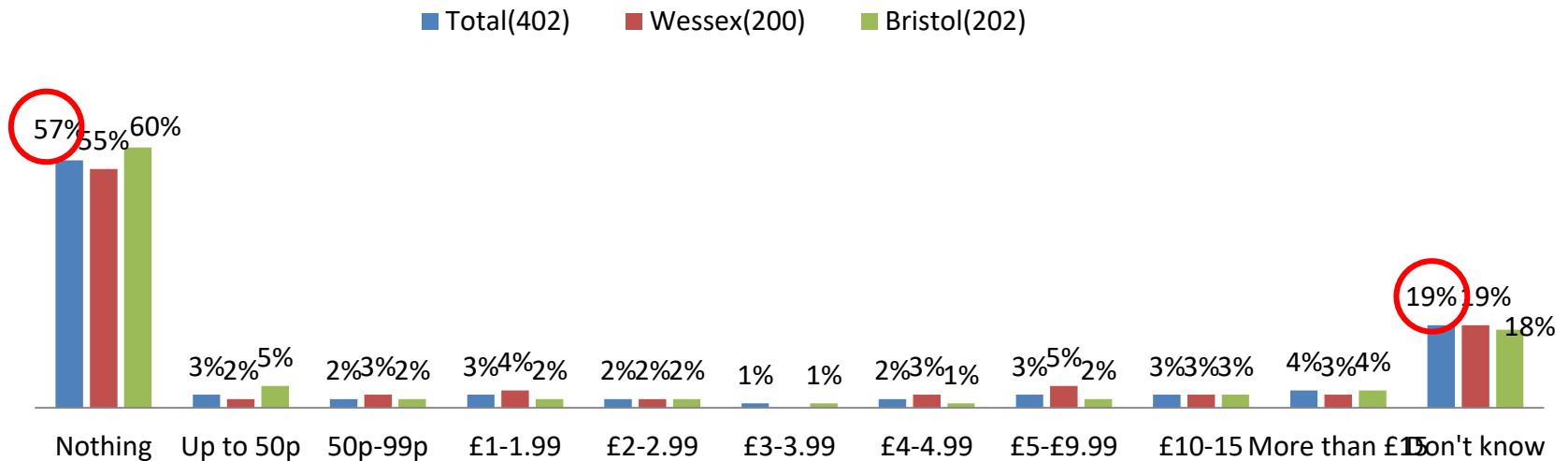
"I'm sure that people on benefits etc. get an allowance for the water bill so they should be able to pay it without asking customers to contribute."

N.B. Open-ended, free response question. No suggested responses provided to respondents but answers categorised at analysis.

Unprompted willingness to pay for lowering the WaterSure cap

Q12 How much extra, if anything, would you be willing to pay on your annual household water bill to support those on this WaterSure Scheme?

How much would you be willing to pay to support those on WaterSure



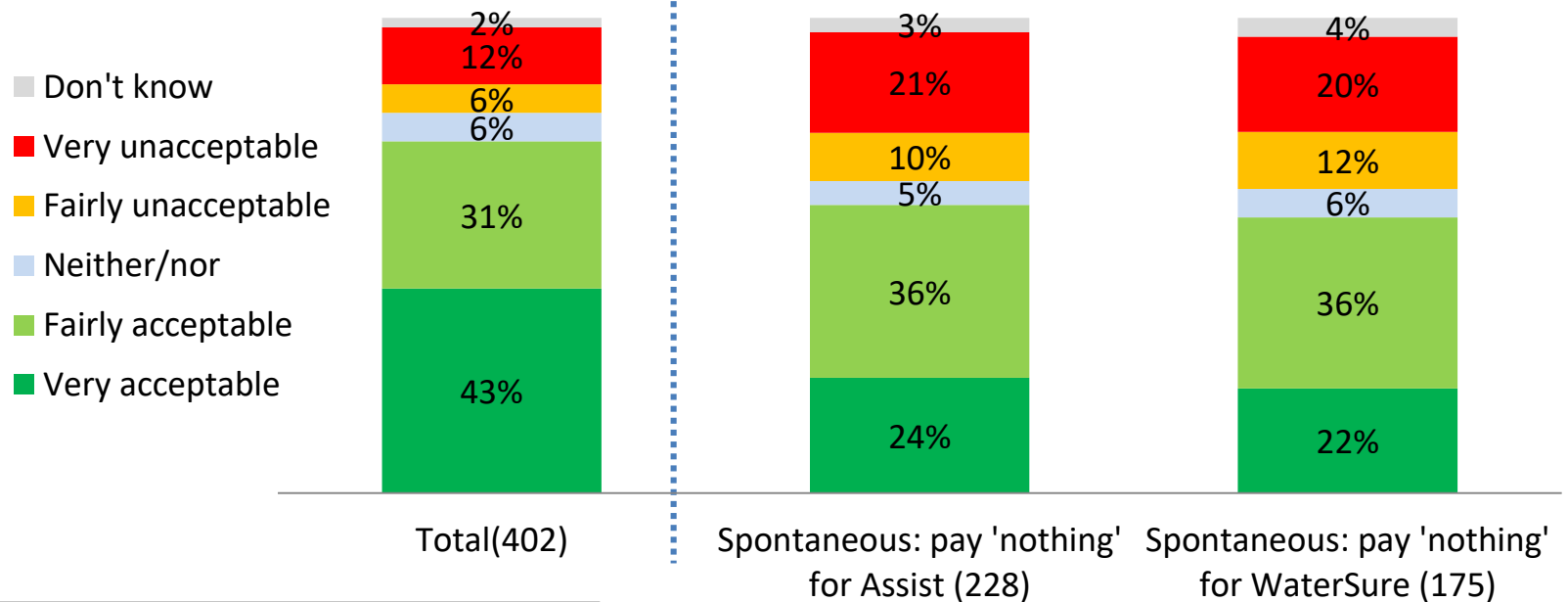
When asked unprompted how much they would be willing to pay, 57% are not willing to pay anything. (N.B. 97% of those not willing to pay for Assist also not willing to pay for WaterSure)

- A further one in five (19%) are unable to say.
- Of those customers who felt able to comment the average annual amount suggested is **£2.50** (slightly higher than for Assist)

Majority accept 50p extra on bills for these tariff proposals

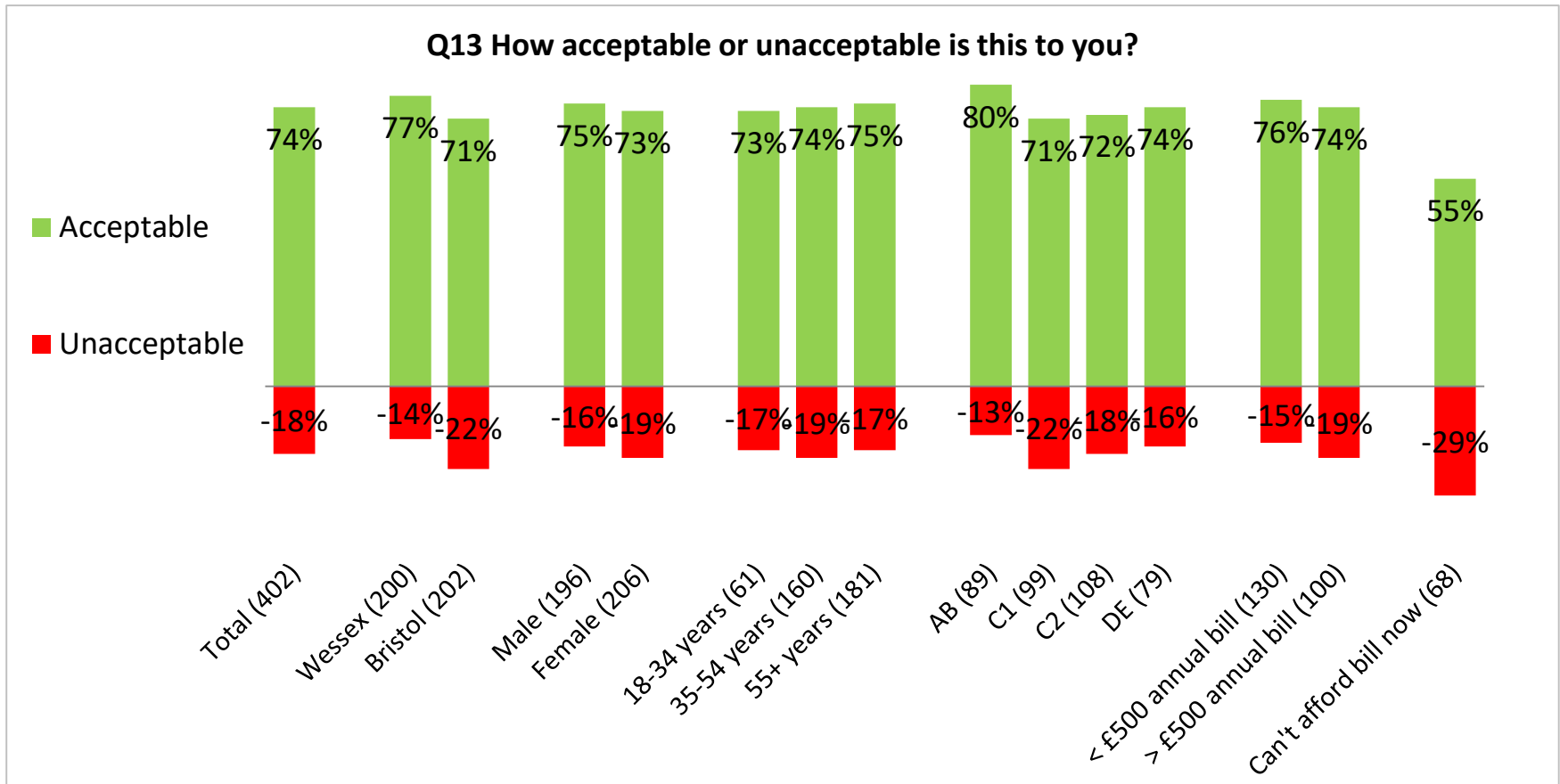
Q13 Thinking about the changes Wessex Water want to make to the Assist tariff and WaterSure together, at the level Wessex Water plan to help these customers, the extra cost would be less than 50p per year on your water bill. How acceptable or unacceptable is this to you?

How acceptable is adding less than 50p year to your bill?



The majority of customers (74%) would find it acceptable to pay up to 50p a year on their water bills to help customers on social tariffs. A minority (18%) find it unacceptable.

Among those customers who said they would pay 'nothing' (when asked spontaneously) the majority think 'up to 50p' is acceptable: Assist (60%) and WaterSure (58%).



On balance all customer groups find up to 50p extra on their annual bill for social tariffs acceptable.

Those who are less accepting are customers in Bristol, those in social class C1 and those who currently find it hard to afford their water bill now.

Attitudes towards paying up to an extra 50p per annum

N.B. Open-ended, free response question. No suggested responses provided to respondents but responses categorised at analysis.

Reasons why acceptable

I would not miss 50p/too small amount (84%)

Other reasons:

- Happy to help those in need/struggling
- Fair to help those who can't pay
- Happy if people genuine/deserve it
- I'm on benefits/disabled

"50p over a year is nothing"

"Because it is so insignificant I would not even notice if it went up by that small amount."

"When you say it like that, actually fifty pence is nothing but I would object to paying anymore."

"50 pence is a lot for me as we struggle already; we get a water bill & we make sure we keep enough to pay it."

Reasons why not acceptable

Shouldn't have to pay for others (26%)

- Can't afford it/I'm struggling (12%)
- Will lead to more price rises (12%)
- Water co. should pay/from profits (11%)
- Too expensive now/pay enough already (10%)
- These people already get support/benefits/enough money (10%)
- We should all pay the same (7%)

"Because I don't see why I should pay for other people."

"Spent enough of my life paying for other people."

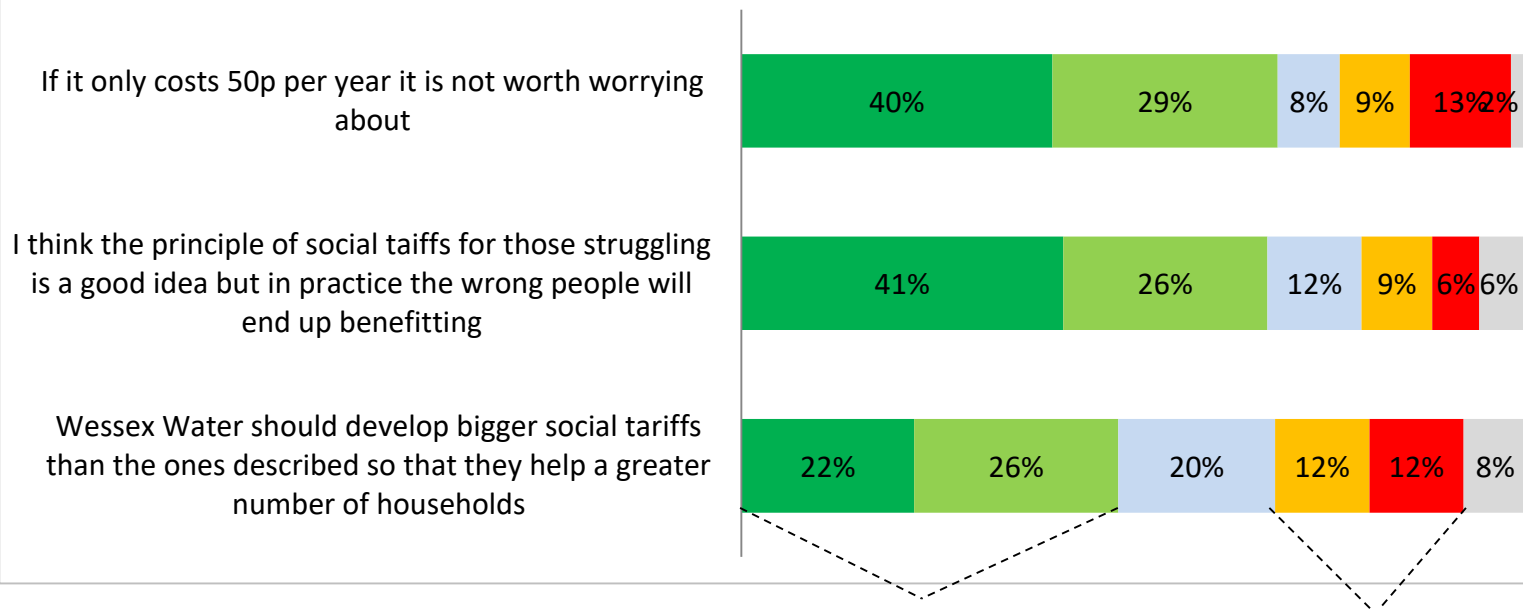
"Because it is the thin edge of the wedge, it may be 50p now but where does it end? It will just go up and up."

Attitudes towards social tariffs

The majority of customers (69%) agree that 50p increase is 'not worth worrying about'. However, same proportion also think the wrong people will benefit from social tariffs (67%). Opinion is divided over whether Wessex Water should develop bigger social tariffs to help more households (48% agree but 24% disagree and 20% are undecided).

Q15 How much do you agree or disagree?

■ Strongly agree
 ■ Tend to agree
 ■ Neither/nor
 ■ Tend to disagree
 ■ Strongly disagree
 ■ Don't know



More likely to agree:
 DE social class (61%)
 Can't afford water bill (61%)

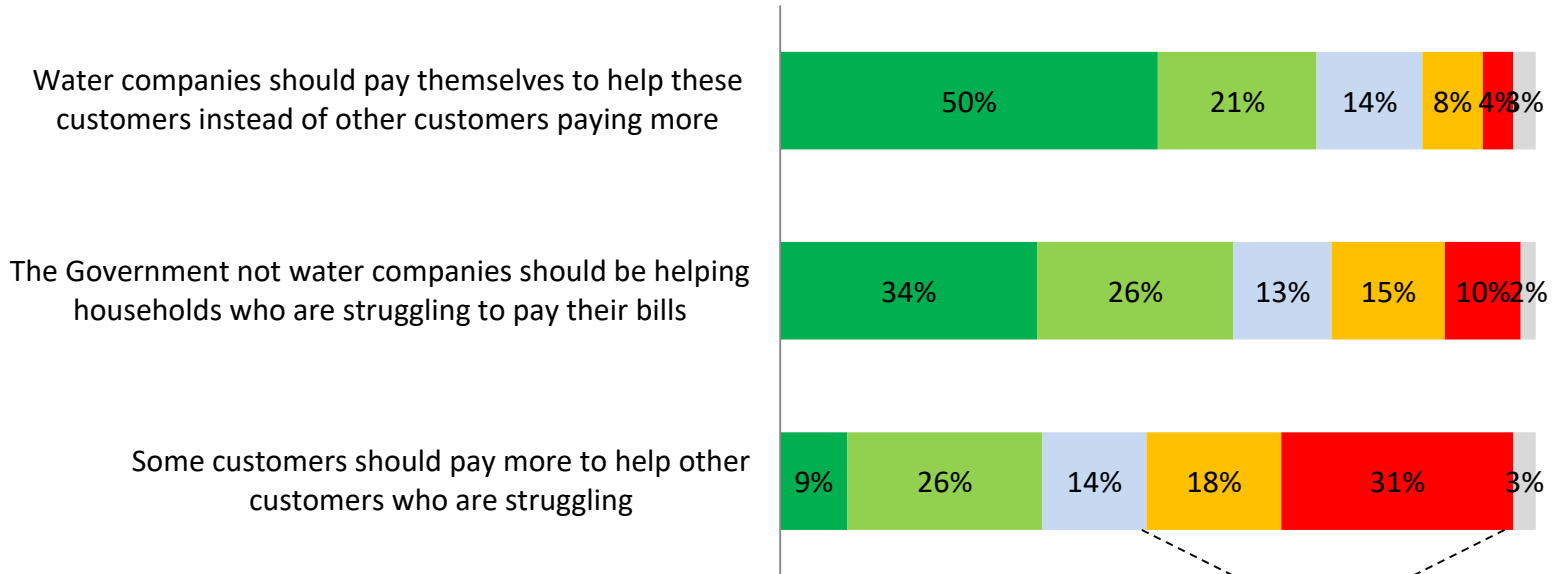
More likely to disagree:
 AB social class (27%)
 C1 social class (31%)
 Metered (31%)

Who should pay for social tariffs?

Customers are much more likely to think that water companies themselves (71%) or governments (60%) should pay to help struggling customers than think customers should help (35%).

Q15 How much do you agree or disagree ?

■ Strongly agree
 ■ Tend to agree
 ■ Neither/nor
 ■ Tend to disagree
 ■ Strongly disagree
 ■ Don't know



More likely to disagree:

- C1 social class (61%)
- Can't afford water bill (61%)
- Bristol (54%)
- Female (52%)

Appendix:



Conclusions from previous social tariffs research (qualitative)

1. Customers support principle of social tariffs to help the less well off (but sceptical of motives & tariff complexity)
2. Support for the principle is undermined by concerns about who will benefit (& the benefit trap)
3. No clear consensus on the principle of cross subsidy, but it is more acceptable via governments than via commercial organisations
4. Customers identify a need to extend social tariffs beyond WaterSure
5. Customers struggle to define fair eligibility criteria (old age & disability more deserving than benefits). They want an holistic assessment not just means tested benefits
6. More affluent customers willing to pay around £10 a year (spontaneously). But the majority (C1C2) not willing to pay to cross subsidise. When discussed and required to come to a group consensus, a figure of 50p-£1/month agreed upon
7. Customers surprised by the low cost of examples provided in the research, leading to increased acceptability
8. Customers want to see the water company (not just customers) contributing.

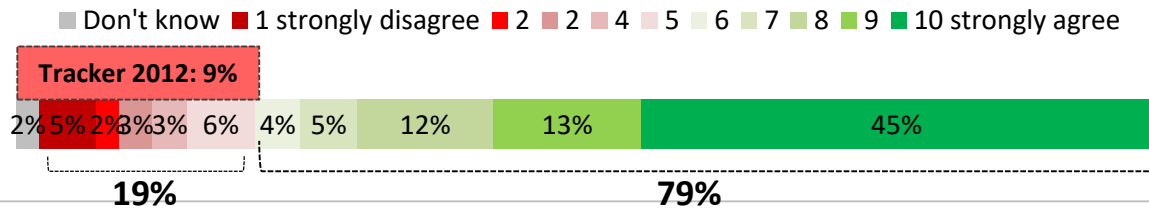
Sample Profile: affordability

Knowledge of bill price

- Two in five customers are **unable** to estimate their water bill (40%)
- Even among those who are able to, a further 14% describe their estimate as *'just a guess'*
- On average, those that can tend to over-estimate their bills by c.£50

Average Annual Estimate	
Total	£485
Wessex	£514 (<i>actual = £455</i>)
Bristol	£452 (<i>actual = £403</i>)

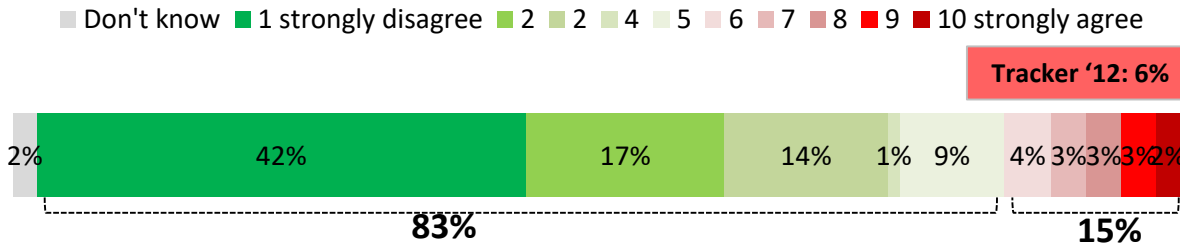
I don't really think about my water bill, it's just something that I have to pay



Majority don't think about their water bill.

No significant variation by region, social class or bill price. But unmetered more likely to agree

I already can't afford my water bill



15% say they can't afford the bill (6+ out of 10).

Affordability issues greater:

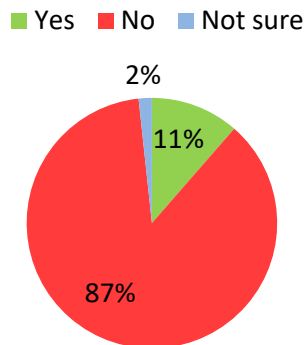
- Bristol (20%)
- DE social class (30%)

(but does not relate to bill price or metering)

N.B. Caution when making direct comparisons due to question order effect: 'Tracker' questions asked in context of broader survey about water company services whereas here asked at end of survey solely about social tariffs and willingness to pay.

Q6 Industry regulators encourage energy and water companies to offer lower bills to certain customers who are struggling financially. These are sometimes called “social tariffs” and mean that other customers not on the social tariff pay a bit more than they otherwise would. Before today, were you aware that some energy and water companies offer these special rates?

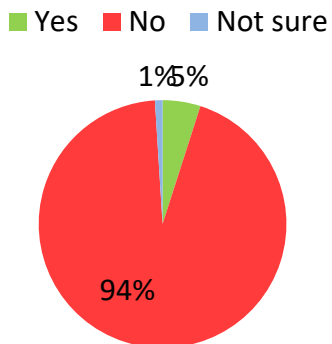
Q6 Aware of 'social tariffs'?



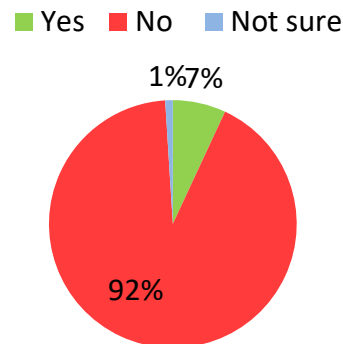
One in ten are aware of the existence of the principle of social tariffs in the utility sector (11%).

Awareness of Assist Tariff and WaterSure is also low (5% & 7% respectively)
N.B. Full question wording included in appendix

Q7 Aware of Assist tariff?



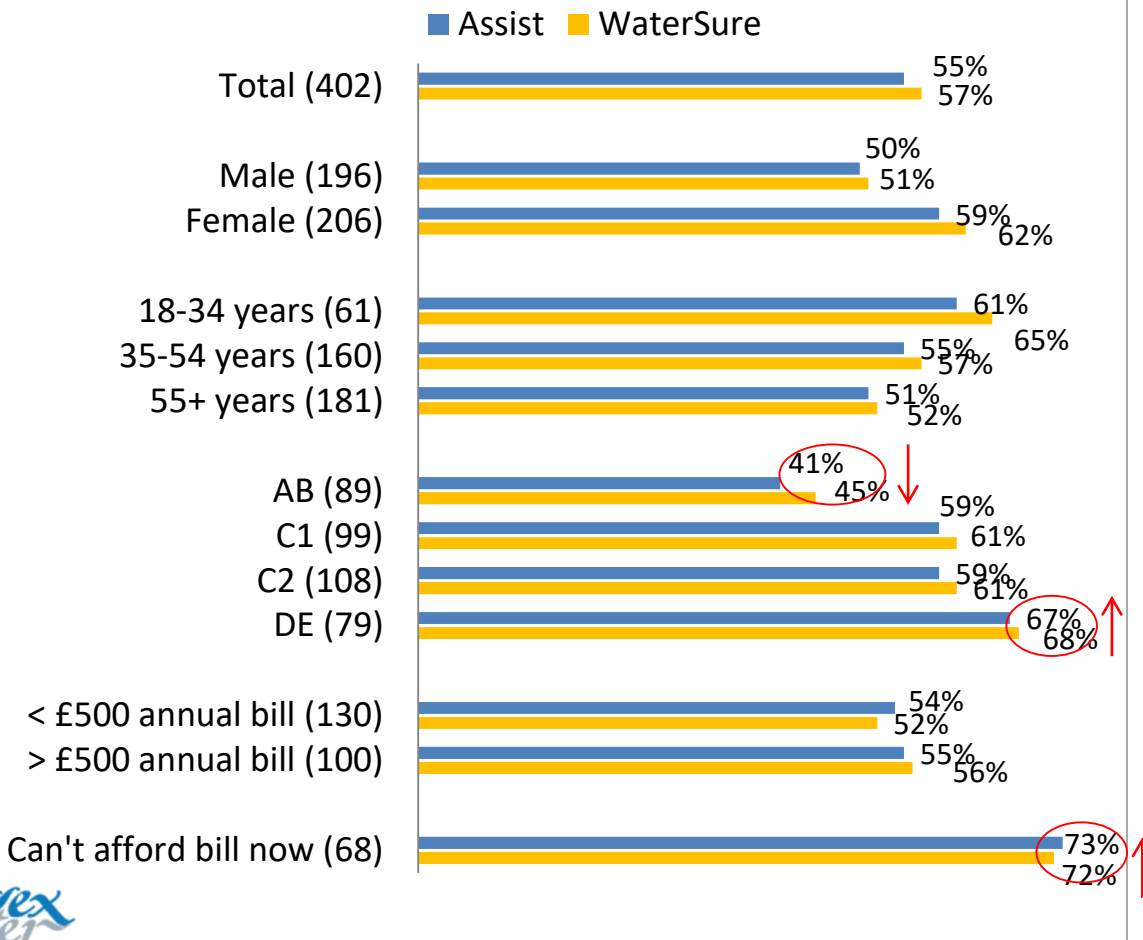
Q10 Aware of WaterSure?



Profile of customers not willing to pay

The same people not willing to pay for WaterSure and Assist (97% of those unwilling to pay for Assist also unwilling to pay for WaterSure)

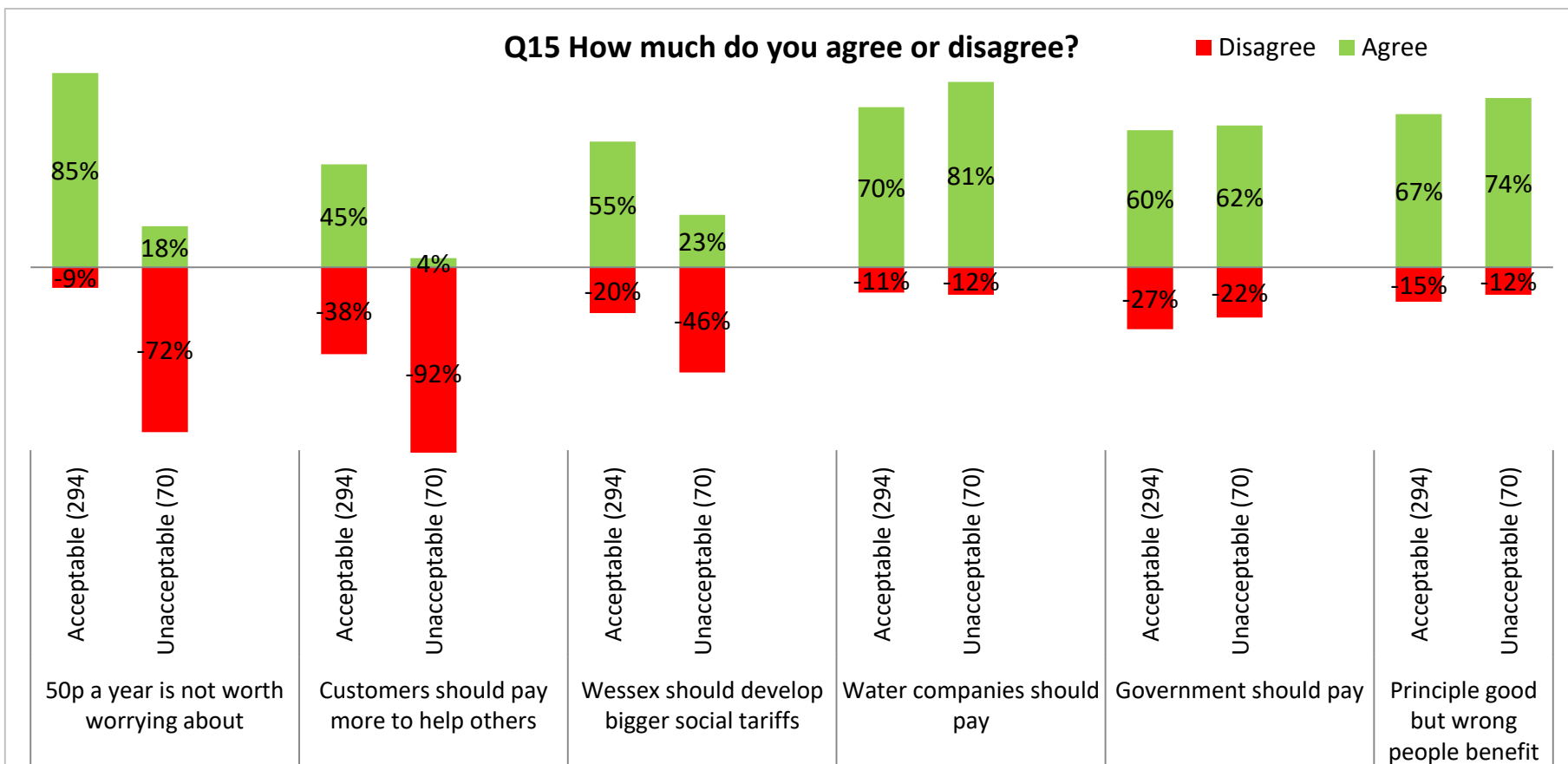
Q9/12 % unprompted willing to pay nothing for Assist/WaterSure



Willingness to pay is strongly associated with social class and affordability.
 (It is not associated with current bill price)

Views about whether water companies or government should pay or whether the wrong people will benefit do not vary according to how acceptable customers find the 50p proposals.

But those who think it unacceptable are more likely to oppose Wessex developing bigger social tariffs and reject cross subsidy. For this group the small amount (50p) does not override these objections.



Q1 Can I just confirm that you are the person in your household who is responsible for dealing with your water and sewerage company, and that you pay the bills (either solely or jointly)?

- Yes
- No

Q2 And can I check whether anyone in your household is employed in any of the following industries?

- Journalism
- Market Research
- Marketing
- Public Relations
- Water (whether for a water company or a contractor)
- None of these

Q3 Gender (INTERVIEWER DO NOT ASK)

- Male
- Female

Q4 In order to ensure we speak to a range of people, please can you tell me which of the following age bands you fit into?

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65-74 years
- 75+ years

**Q5a Can you tell me the name of the water company that provides you with your drinking water?
(DO NOT PROMPT. SINGLE CODE)**

Q 5b And can you tell me the name of the water company that provides you with your sewerage services

Q6. Industry regulators encourage energy and water companies to offer lower bills to certain customers who are struggling financially. These are sometimes called “social tariffs” and mean that other customers not on the social tariff pay a bit more than they otherwise would. Before today, were you aware that some energy and water companies offer these special rates?

Yes, no, not sure/Don't know

Q7. Wessex Water/Bristol Water offer a social tariff called Assist. Customers on means tested benefits and who are assessed by the Citizens Advice Bureau to be struggling financially are offered a lower bill based on what they can afford. Around 7,000 of a total of 1.1 million households have their annual bill reduced to an affordable level on this scheme. On average the reduction is £200 per year. Are you aware of the Assist tariff?

Yes, no, not sure/don't know

Q8 Wessex Water / Bristol Water are considering making some changes to Assist. The changes would help more customers but would mean other customers paying a bit more. Wessex Water/Bristol Water would like to know if you accept or reject these changes.

Wessex Water / Bristol Water are planning to offer Assist to a wider range of customers than just people on means tested benefits. In total Wessex Water/Bristol Water expect that the changes will mean they will help another 6,000 households by reducing their bills by an average of £200.

They are proposing to use some new criteria and customers would be expected to meet some or all of them before having their bill reduced. For each please tell me if you support or oppose the criteria being used:

Strongly support, tend to support, neither/nor, tend to oppose, strongly oppose, DK

ROTATE ORDER

- The customer will have to have received debt advice from a Citizen's Advice Bureau or similar. (always ask this one first)
- The customer is cutting back on essentials such as food and heating to pay for the water bill and other bills
- The customer's water bill is more than 5% of the household income they have left after tax and paying their mortgage or rent
- The customer is behind in payments on other essential household bills
- Total household savings are not significant
- The customer is not spending a large amount on non-essential items
- The customer or someone else in the household has a disability/long term medical condition
- The customer is willing to have a water meter where this would lower their bills

Q9 Wessex Water/Bristol Water expects that all customers will have to have received debt advice from the Citizen's Advice Bureau and that a majority of the other criteria will also apply before they lower the customers' bill. This will help an extra 6,000 households

Now that you know this, how much extra, if anything, would you be willing to pay on your annual household water bill to support those on this Assist Scheme?

Q10 Wessex Water/Bristol Water are also required to offer a social tariff called WaterSure. This is for low-income customers who have a water meter and use a lot of water. Customers on means tested benefits e.g. Job Seekers Allowance or Income Support, and have either large families or have a medical condition that means they need to use a lot of water are eligible. Bills are capped at a certain amount for these customers. Currently around 3,500 households out of a total of 1.1 million households qualify for the scheme. Are you aware of the WaterSure scheme?

Yes, no, Not sure

Q11 Wessex Water / Bristol Water are considering making some changes to WaterSure and would like to know if you support or oppose these changes. At the moment Wessex Water / Bristol Water caps the bills these customers pay to £455 /£403 per year. Wessex Water / Bristol Water want to lower this cap to £388/344 per year.

This would mean that the 3,500 customers eligible for WaterSure would pay no more than the average bill of other customers with a water meter. This would mean that other customers would pay a bit more on their bill. Do you support or oppose this change?

Strongly support, tend to support, neither/nor, tend to oppose, strongly oppose, DK

Q12 How much extra, if anything, would you be willing to pay on your annual household water bill to support those on this WaterSure Scheme?

Q13. Thinking about the changes that Wessex Water / Bristol Water want to make to the Assist tariff and WaterSure together, at the level Wessex Water/Bristol Water plan to help these customers, the extra cost would be less than 50p per year on your water bill. How acceptable or unacceptable is this to you?

Very acceptable, fairly acceptable, neither/nor, fairly unacceptable, very unacceptable, DK

Q15 How much do you agree or disagree with the following statements about social tariffs? ROTATE ORDER

- Some customers should pay more to help other customers who are struggling
- If it only costs 50p per year, it is not worth worrying about
- Wessex/Bristol Water should develop bigger social tariffs than the ones already described so that they help a greater number of households
- Water companies should pay themselves to help these customers instead of other customers paying more
- The Government not water companies should be helping households who are struggling to pay their bills
- I think the principle of social tariffs for those struggling is a good idea but in practice the wrong people will end up benefitting

•Q16a Roughly how much do you think you currently pay, combining your water supply and sewage service? Please tell me this as a monthly or annual figure – whichever is easier for you to remember

IF APPROPRIATE PROBE: this doesn't have to be to the nearest pound – you can give me a figure to the nearest £5 per month or £50 per year

Q16b And can you tell me, are you very or fairly confident that this approximation is accurate or is it just a guess.

Very confident – I know what I pay

Fairly confident – I'm fairly sure I know what I pay

Just a guess – I'm not very sure of what I pay

****FOR THOSE WHO SAY DON'T KNOW/REFUSED INTERVIEWER READ OUT**

FOR WESSEX/WESSEX SAMPLE "Currently the average bill from Wessex Water for customers' water and sewage service is £38 per month or £455 per year".

FOR WESSEX/BRISTOL SAMPLE "Currently the average bill in your area for customers' water and sewage service is £34 per month or £403 per year".

Q17 How strongly do you agree or disagree with the following statements about your water bill? Please use a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree.

- I don't really think about my water bill, it's just something that I have to pay
- I worry about not being able to afford my water bill
- I already can't afford my water bill



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