

Appendix 18f: Fineline Social Tariff Research

fineline market research

Bridging the gap between **you** and your **customers**



Social Tariffs Research – Research Findings



Contents

- Background & objectives
- Methodology & sample profile
- Attitudes towards social tariffs
- Concerns & measures for enhancing support
- Willingness to pay for an extension to WaterSupport
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BACKGROUND & OBJECTIVES

Background

- In June 2012, the Department for Environment Food and Rural Affairs (Defra) published guidance allowing companies to bring forward social tariffs, permitting cross-subsidy between customers.
- YW undertook research in 2014 to understand the impact of introducing a social tariff and to establish how acceptable this was to their customers.
- This led to the introduction of WaterSupport subject to certain criteria aimed at addressing customer concerns, namely:
 - being targeted at those households that are not in arrears with their water bill payments;
 - being partially funded from profits i.e. a £500,000 contribution from YW to reduce the cross subsidy from 90 pence to c. 65 pence;
 - it forming part of YW's affordability strategy that includes advice on water efficiency and metering
 - those eligible being in receipt of a net income below the minimum wage level, irrespective of whether or not they receive benefits and having a bill value at least £100 greater than the average bill.
- The tariff has been very popular; by March 2017 there were c.12,000 households on the tariff against a target of 10,000. The budget threshold through the cross subsidy has been reached, which means further growth in numbers will exceed the level supported by customers.

Objectives

- Yorkshire Water consequently commissioned fineline to undertake research to establish whether there is support for their social tariff be extended to a greater number of customers to help address the issue of affordability.

Core Objectives

To determine customer support for Yorkshire Water's current social tariff in view of the benefits it has provided since implementation

1

To identify the amount customers are prepared to pay in addition to the current bill value to support customers who are financially vulnerable

2

To identify the barriers or concerns, if any, which need to be addressed to make further support acceptable

3

Additional Objective

- The research was also extended to look at levels of support for other measures that YW could introduce to provide support to its customers.

Approach



1 8 UPFRONT TELE-DEPTHS

3 with customers on WaterSupport
5 with customers on the standard tariff
Mix of age, gender and SEG
Average depth duration – 18 minutes

22 May – 2 June 2017



2 1,000 ONLINE SURVEYS

YW bill payers, none currently on WaterSupport
Broadly representative by bill payer, age, gender and SEG
Interview duration – 15 minutes
Optimised for mobile completion

27 June – 10 July 2017

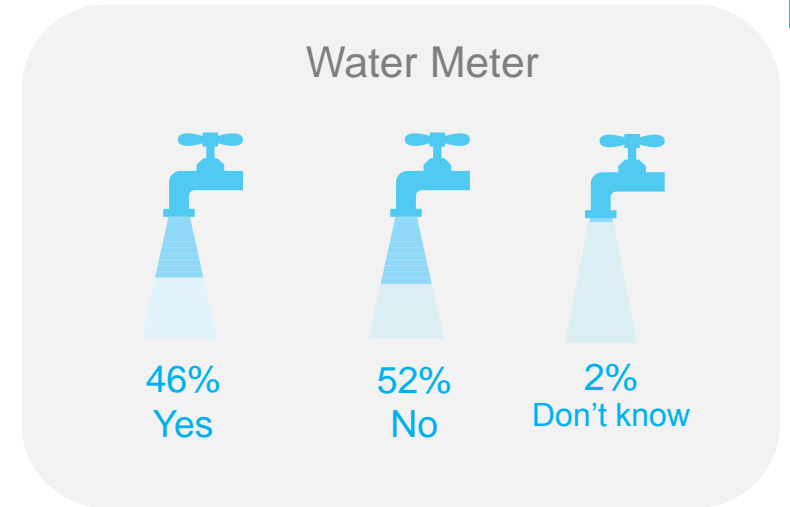
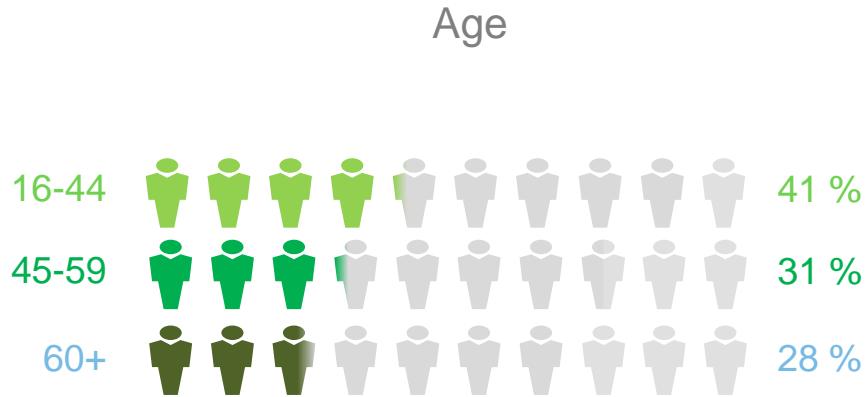
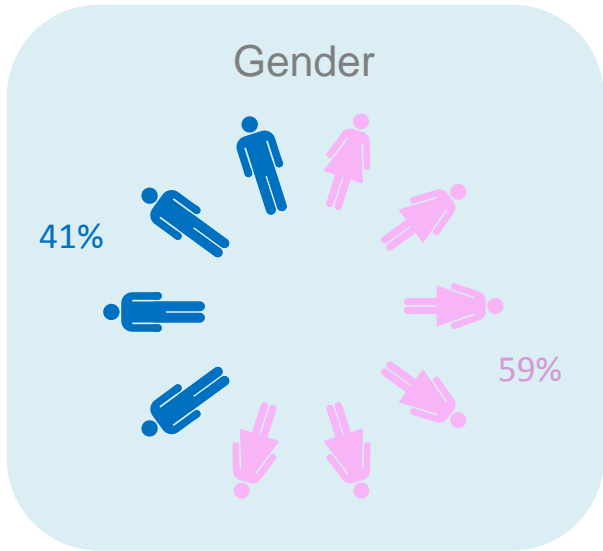


3 10 FOLLOW UP TELE-DEPTHS

3 with customers who believed funding should be from profits
3 with customers concerned it could be open to abuse/was unfair
2 with people who wanted to ensure recipients were water efficient
2 with people concerned to raise awareness of WaterSupport
Mix of age, gender and SEG
Average duration – 10 minutes

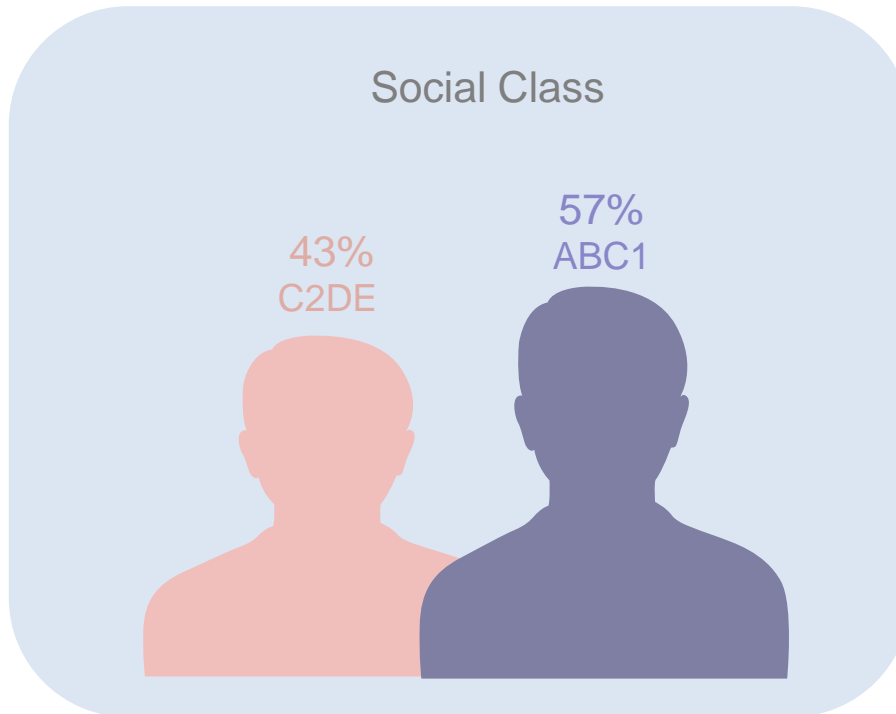
17 July – 20 July 2017

Quantitative Survey Sample Characteristics – Demographics



Annual Income

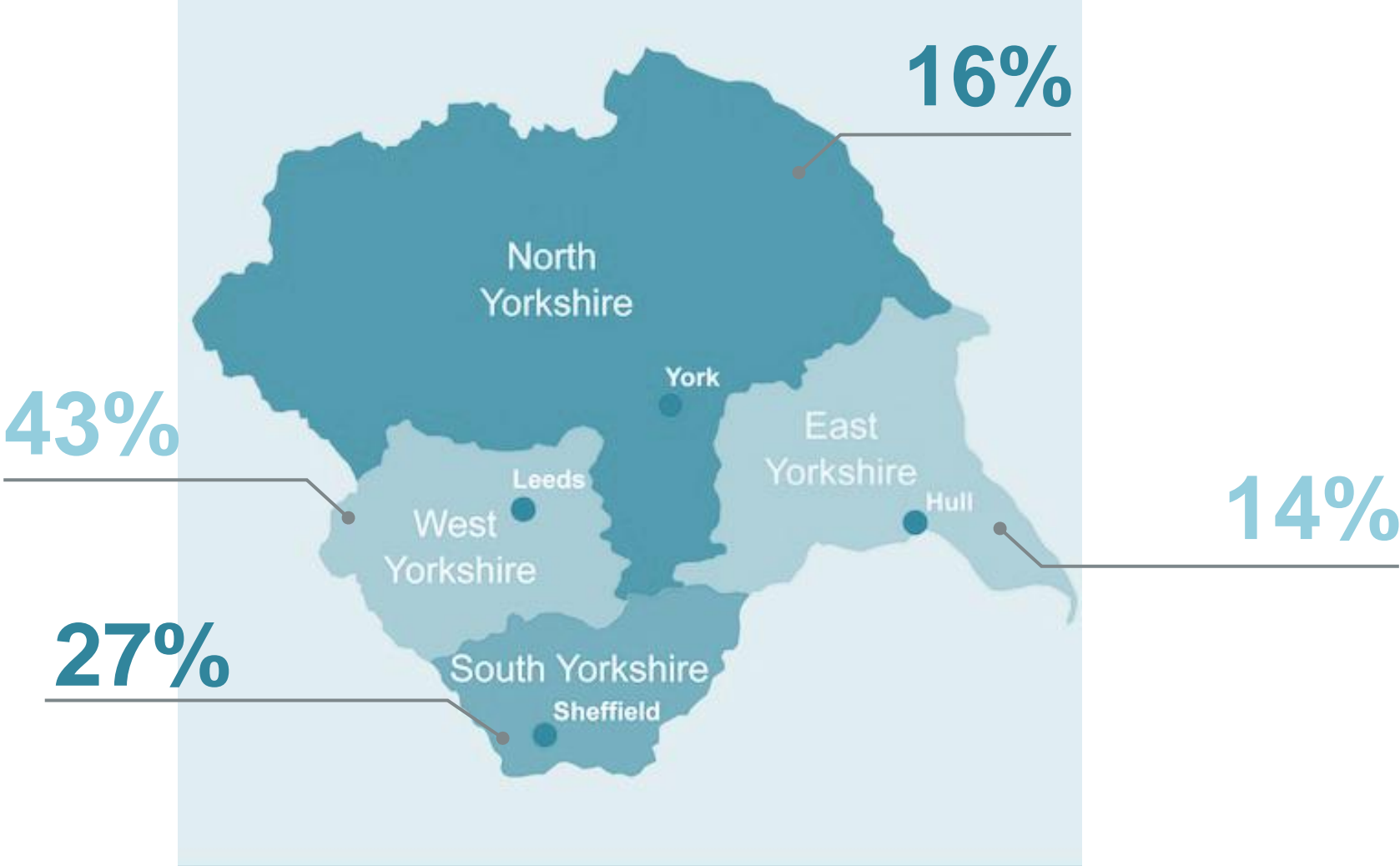
Less than £10k	14%
£10k - £19,999	24%
£20k - £29,999k	22%
£30k - £39,999	14%
£40k - £49,999	10%
£50k +	9%
Refused	8%



Bill Size

Less than £299	34%	£ £ £ £
£300 - £449	24%	£ £ £
£450+	20%	£ £
Don't know	22%	£ £

Quantitative Survey Sample Characteristics - Location



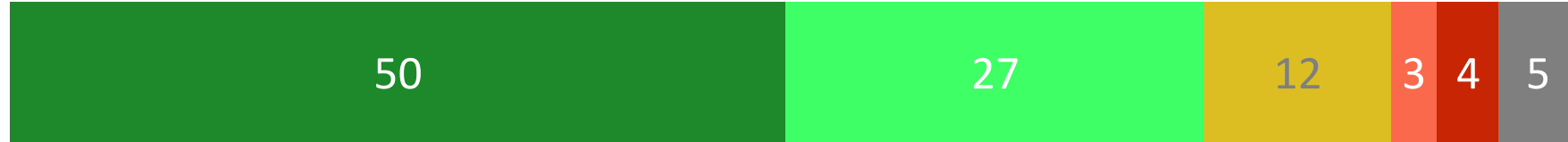
79% urban; 29% rural

MAIN FINDINGS

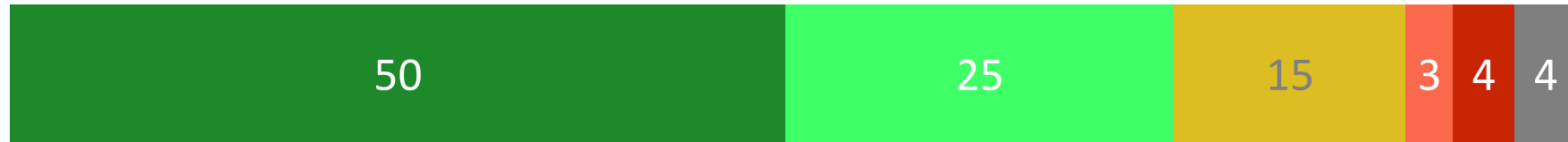
Attitudes Towards Social Tariffs

The majority of customers support the principle of social tariffs, and the majority agree that YW should offer a social tariff.

- Levels of support drop very slightly once the idea of cross subsidisation is mentioned, even when they hear how it has helped others.



Q3. Social Tariffs help customers on very low incomes who are struggling to pay their water bill. They offer cheaper bills for these vulnerable customers. To what extent do you agree with companies offering social tariffs? Base: all participants - 1000









Q5. To what extent do you agree with Yorkshire Water offering a social tariff? Base: all participants - 1000

"Now I have peace of mind that my bill is going to be manageable until I can better my finances"

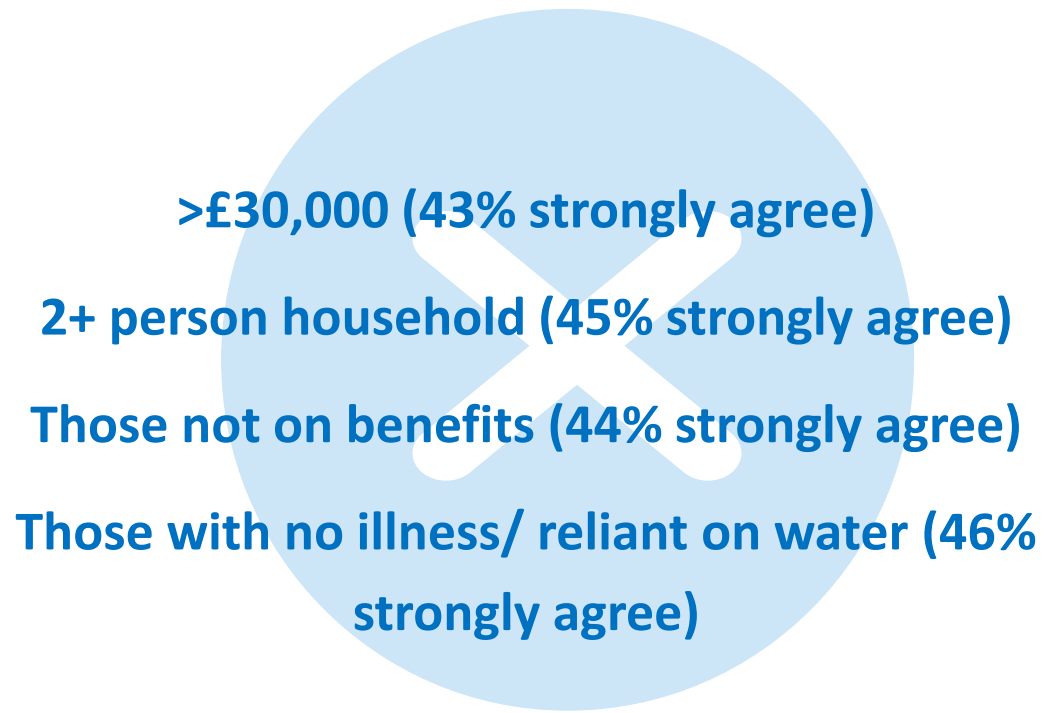
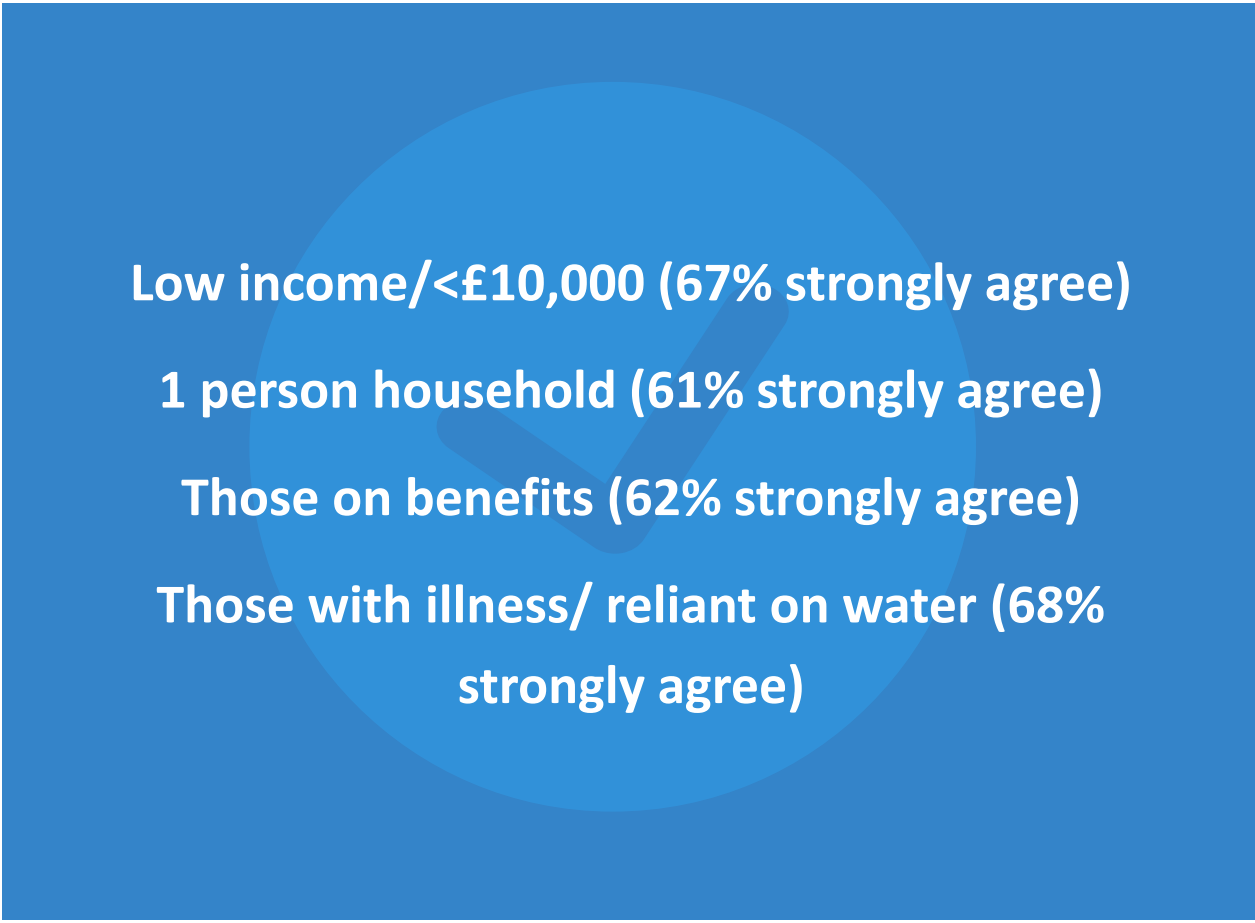


"It helps to keep some dignity when paying your bills in small affordable payments"

Q6. Two people who are currently on the WaterSupport scheme have provided a couple of quotes about the impact WaterSupport has had on their lives. Having seen how it is helping some customers, to what extent do you agree with Yorkshire Water offering a social tariff which is subsidised through other customers' bills? Base: all participants - 1000

 Strongly Agree
  Slightly Agree
  Neither
  Slightly Disagree
  Strongly Disagree
  Don't Know

Support for Yorkshire Water offering a social tariff is significantly higher amongst the low income, single occupant households, those receiving benefits, and the long term sick who have a reliance on water.



The same significant differences were seen when the idea of cross subsidisation was introduced

Q5. To what extent do you agree with Yorkshire Water offering a social tariff?
 Base - £10k: 138, £30,000+: 326; 1 person: 221, 2+ people: 779; On benefits: 331, No benefits: 669; Illness, reliant on water: 73, No illness: 708

Customers are happy to know that schemes like this exist and believe that it is a good idea to help prevent customers going into arrears.

- It also has a very positive impact on attitudes towards Yorkshire Water. There is not a widely held expectation that everyone should be paying the same tariff, although views are very mixed.

It's good to know schemes like this exist if you get into financial difficulties.



A scheme like this will help prevent struggling customers going into arrears, which is a good thing



A scheme like this shows that Yorkshire Water is a responsible company.



Everyone should be on the same tariff whatever their circumstances.



Strongly Agree



Slightly Agree



Neither



Slightly Disagree

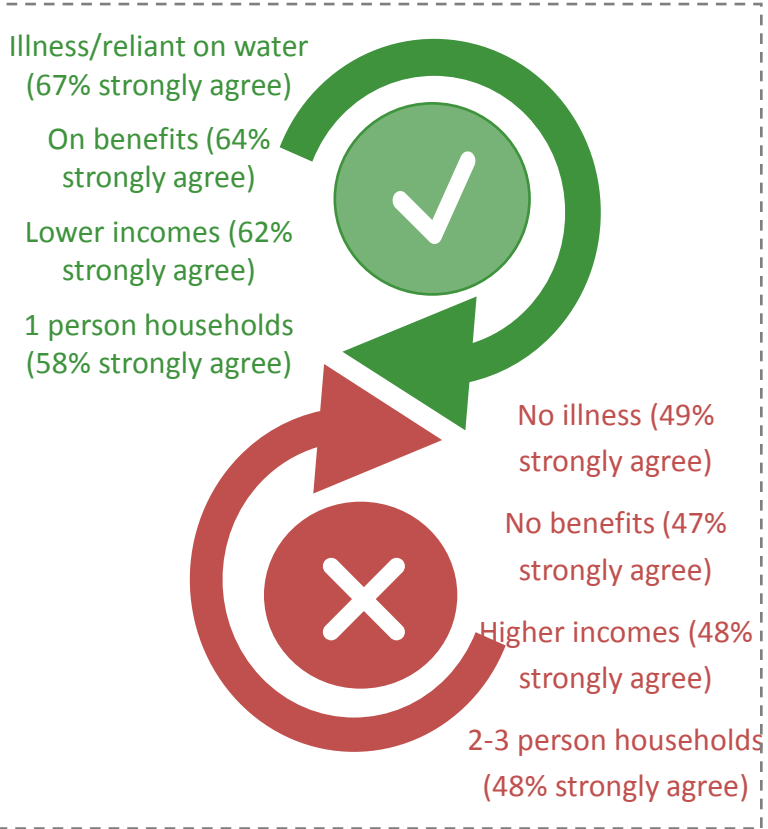


Strongly Disagree

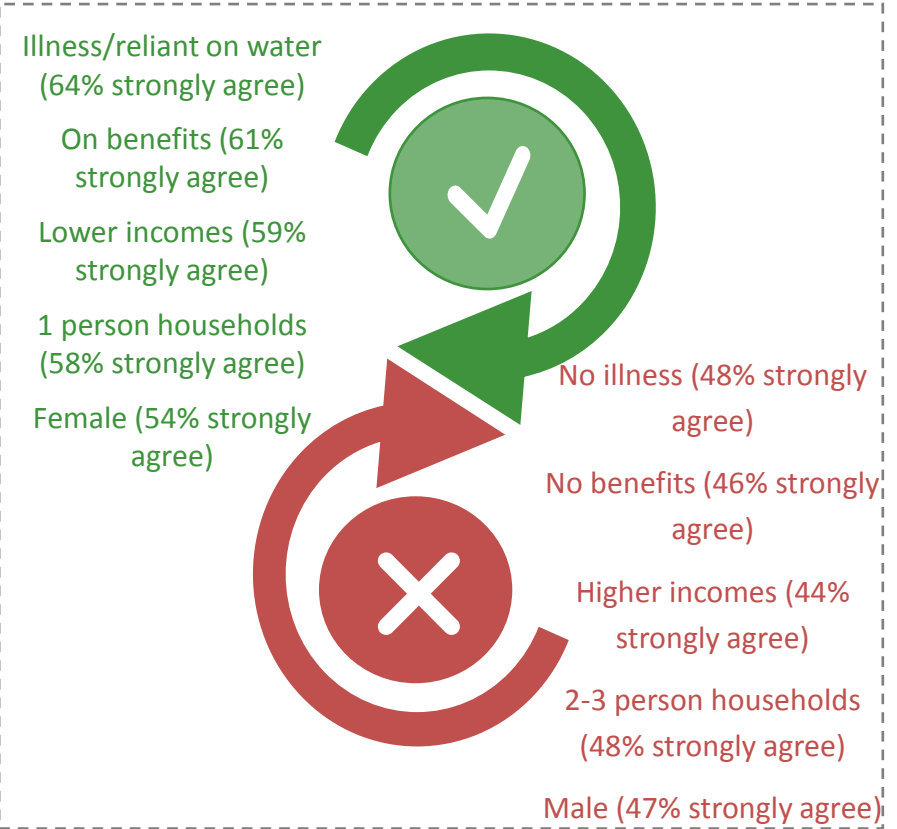


Don't Know

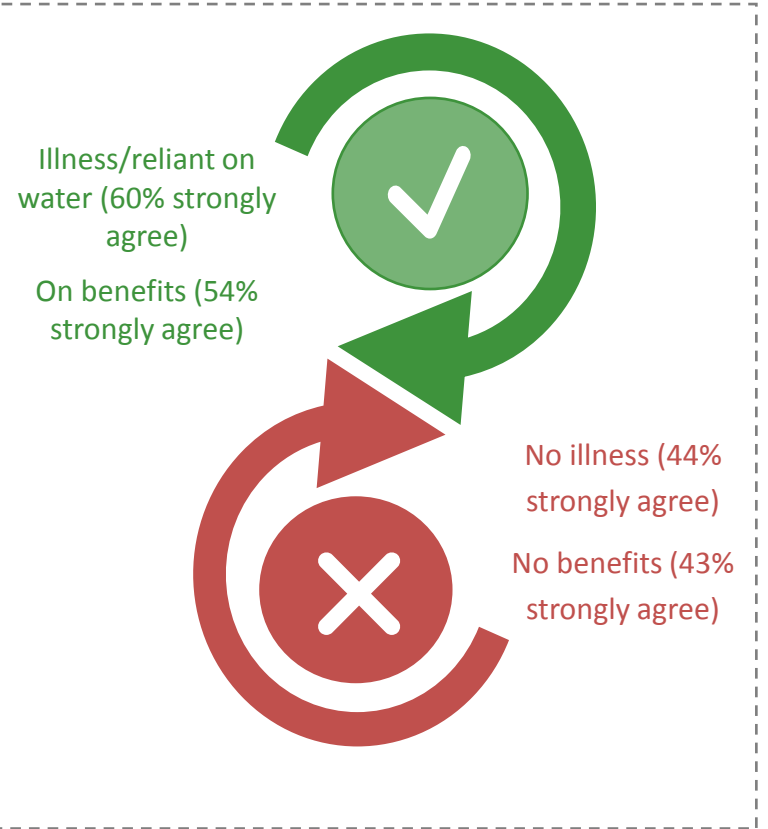
Levels of agreement were once again significantly higher for low income customers, single occupancy households, those with an illness & reliant on water and those on benefits



Q9. It's good to know schemes like this exist if you get into financial difficulties.
 Base: ; Illness/reliant on water: 73, No illness: 708; On benefits: 331, No benefits: 669; Lower incomes (<£20,000): 378, Higher incomes (£20,000+): 544; 1 person HHs: 221, 2-3 person HHs: 592



Q9. A scheme like this will help prevent struggling customers going into arrears, which is a good thing
 Base: Illness/reliant on water: 73, No illness: 708; On benefits: 331, No benefits: 669; Lower incomes (<£20,000): 378, Higher incomes (£30,000+): 326; 1 person HHs: 221, 2-3 person HHs: 592; Male: 410, Female: 590



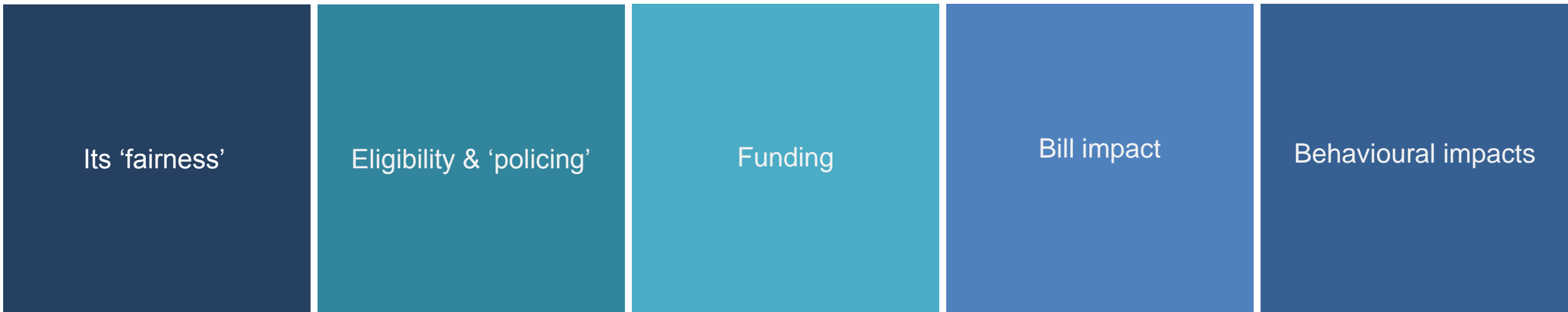
Q9. A scheme like this shows that Yorkshire Water is a responsible company
 Base: Illness/reliant on water: 73, No illness: 708; On benefits: 331, No benefits: 669

MAIN FINDINGS

Concerns & Measures for Enhancing Support

Customer Concerns

- Almost half (44%) of those not ‘strongly agreeing’ with YW offering a social tariff subsidised by customers had ‘no concerns’ about it
- For those who were concerned (31% overall), their issues fell into 5 main areas:



Concerns & Unprompted Mitigation

Its 'fairness'

11%
Overall, 11% of customers were worried about 'fairness'

I don't think people who might be working, who are on a low income, should be supporting somebody also on a low income.
(Male, 45-59, C1C2)

Mitigation

9%
Everyone should pay the same/ I don't get help/ should be fair/ I shouldn't foot the bill

2%
I'm lower income/retired - why should we be subsidising this?

It's coming from customers who can ill afford it themselves.
(Male, 45-59, DE)

6%
Be fair/clear/honest/open /greater explanation

4%
Cap or lower bills / charge everyone the same

Concerns & Unprompted Mitigation

Eligibility & 'Policing'

9%

Overall, 9% of customers were worried about the eligibility criteria and how checks would be made

It should go to people who really need it because of their income and their circumstances, rather than people who've done it [got into arrears] just because they're not very good at managing their income. (Female, 25-44, AB)

The people who are giving out the benefits, they'd have to be checking against their records. (Female, 45-59, C1C2)

Where people are getting benefits, a proportion of those benefits, probably quite a large proportion, should be paid direct to the gas and electric... (Male, 60-74, AB)

Anyone maybe below the ten grand mark. (Female, 25-44, DE)

I know some pensioners are well off and some are poor...I think that would be a better way to fund it, you know, means tested. (Male, 45-59, C1C2)

Mitigation

4%

Rigorous, regular checks

Depth participants had mixed views on who should be eligible

I think if people are working and struggling, I think they should be given more of the benefit of the doubt. (Female, 60-74, AB)

I think it should be elderly, them that's on pension credit etc. You know, maybe look at people on war pensions. **[What about families on low incomes?]** To a degree but, as I say, there are benefits available. (Male, 45-59, DE)

6%

Worried about the abuse of the system/ will need to be policed/ should be a genuine need

3%

How is it going to calculate eligibility? How are customers selected?

Some groups are very deserving, whereas others just grab whatever they can. (Female, 60-74, AB)

Concerns & Unprompted Mitigation

Funding

4%
Overall, 4% of customers were worried about who it is funded by

0.4%
Where is the extra money coming from?

3.6%
Customers shouldn't fund it/
YW/Government should fund it

The water companies are making enough money; they should cover the extra.
(Female, 45-59, C1C2)

These large companies now are making vast profits and the offering of the social tariff looks very good, but it's not coming from your [YW's] profits – it's a little bit cheeky!...If it's going to be a social statement by the company, it should be from the company.
(Male, 45-59, DE)

They're a profit-making organisation; I think they make enough money. We shouldn't have to subsidise other people.
(Female, 60-74, C1C2)

Mitigation

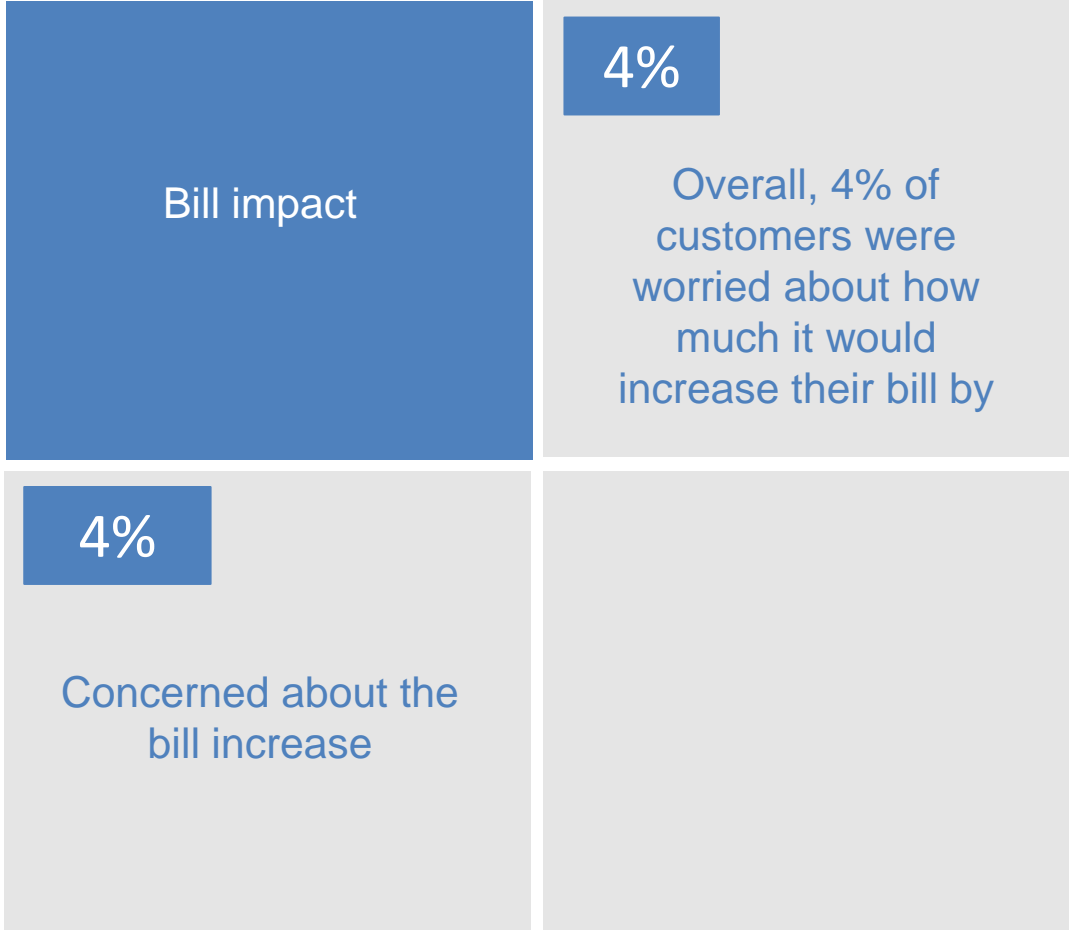
3%
YW to pay more/all of the support

1%
Don't let customers subsidise it

0.7%
Assistance from the Government

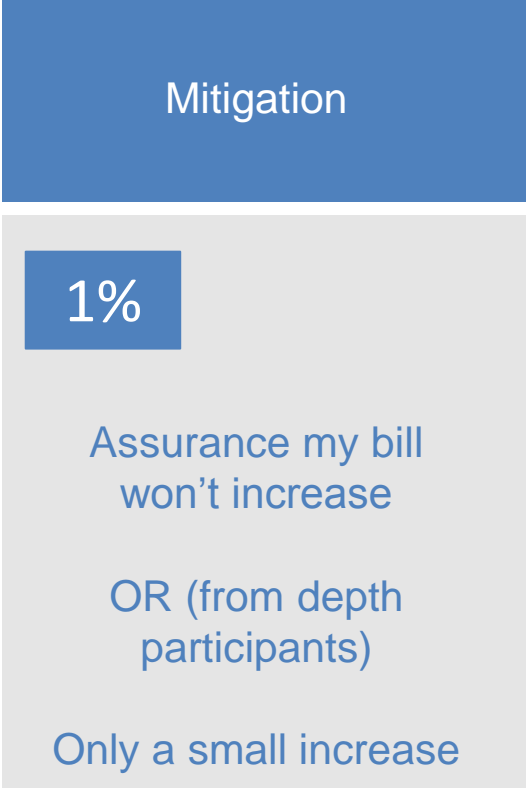
0.2%
Fundraising events

Concerns & Unprompted Mitigation



I can just about manage my water, but if it were to go up I would definitely feel it.
(Female, 25-44, DE)

Pence you don't really miss per month or per year, but when it starts counting into the pounds, that's when you do start feeling an impact on everything else.
(Female, 25-44, DE)



Concerns & Unprompted Mitigation

Behavioural impacts

3%
Overall, 3% of customers were worried about the potential negative impact it may have on customer behaviour

1.8%
Encourages customers to stay on benefits

1.2%
Worried about people not saving water properly

Once the Government, or someone else, starts paying a bill for people, they've got no incentive to change their way of life or to look for a means of providing their own money by going for employment... You get people who are living off benefits and getting every benefit they can and going out to the pub every night. (Male, 60-74, AB)

I think we need to be helping the most vulnerable in society, but by reducing their payments it's not really helping them to look at water saving themselves... I think people need to help themselves as well. (Female, 45-59, C1C2)

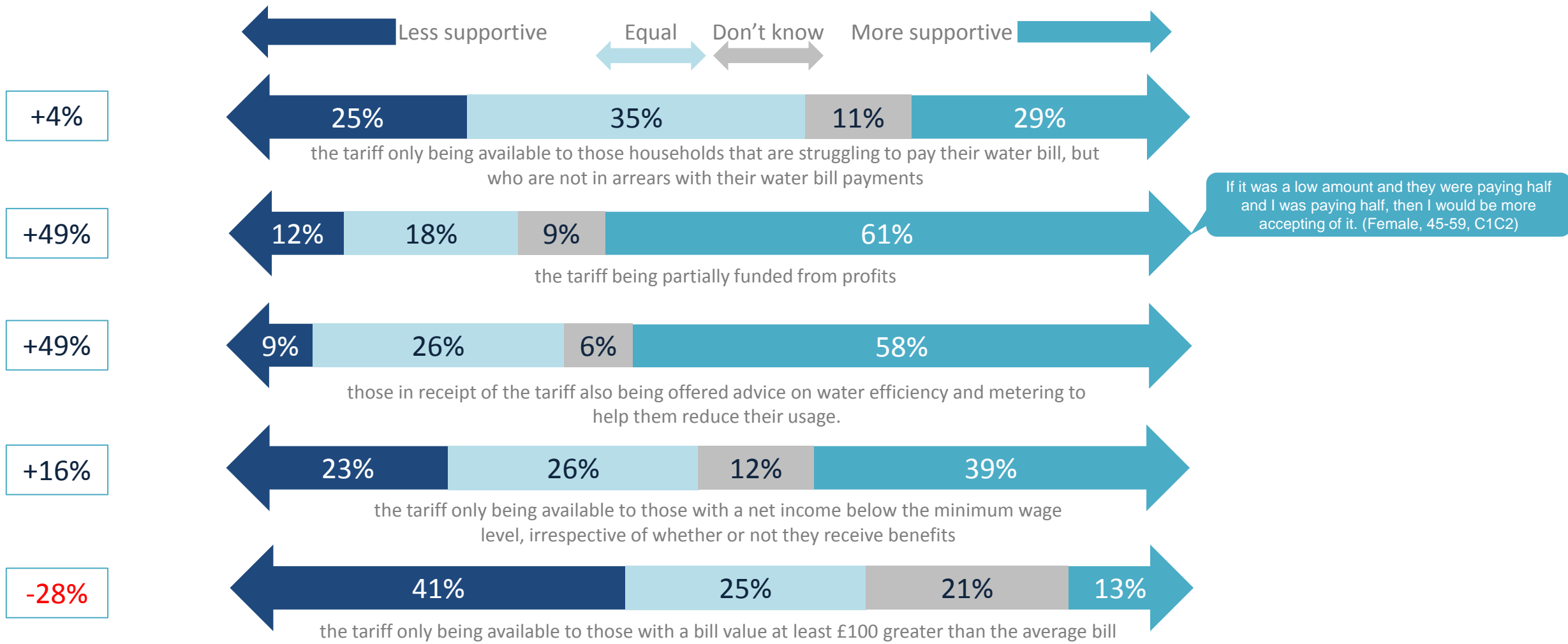
Put 'em onto a water meter and give them the opportunity to save water. (Male, 45-59, DE)

Mitigation

2%
Those receiving should use water sparingly/be educated/be capped/have a water meter

You could look at a system where you agree to pay x number of litres a day... "we will help you, but you'll have to help yourself". (Male, 60-74, AB)

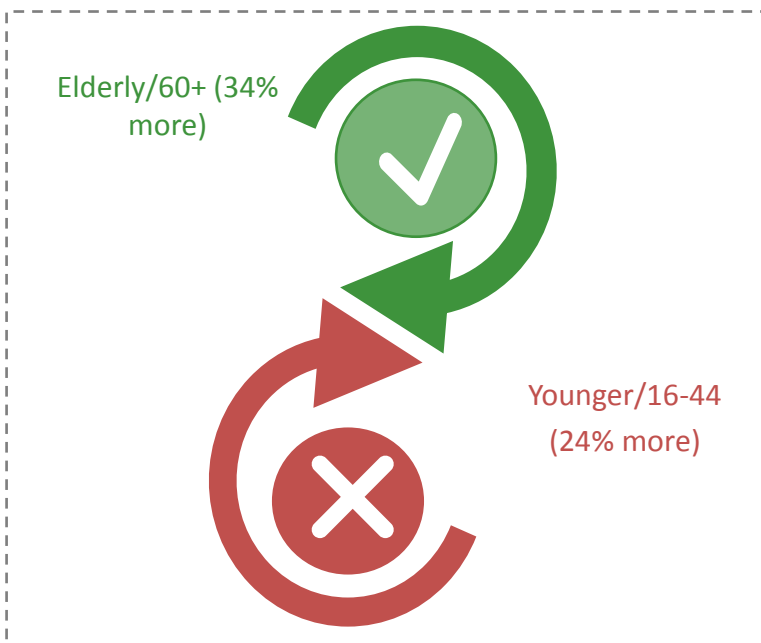
Part funding through profits and also offering water efficiency advice and metering have a very positive effect on levels of support; only making it available to those with a bill value at least £100 greater than the average bill has a negative effect



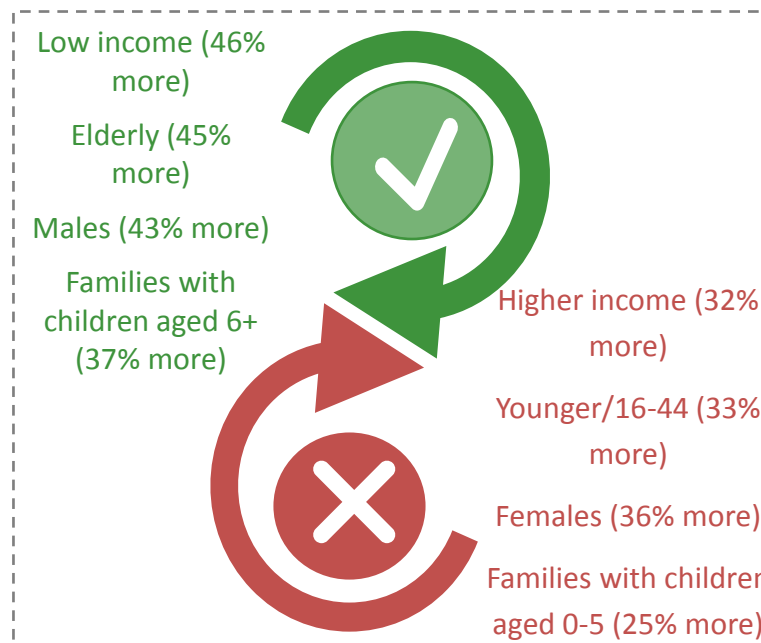
Q10. Please can you indicate whether each of the following would make you more supportive, less supportive or equally supportive of Yorkshire Water offering a social tariff subsidised through other customers' bills: Base: all participants - 1000

The elderly were significantly more supportive of the tariff only being offered to those not in debt and those with a net income below the minimum wage, irrespective of whether they receive benefits.

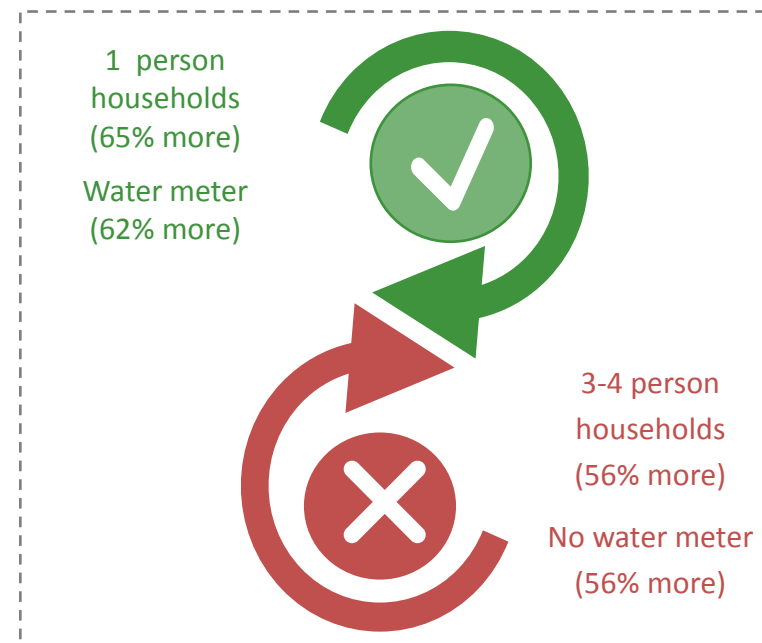
- The latter was also supported by significantly more low income households, males and families with older children. Those on water meters and single person households were more supportive of water efficiency advice being given to recipients.



Q10. The tariff only being available to those households that are struggling to pay their water bill, but who are not in arrears with their water bill payments
 Base: Elderly/60+: 276, Younger/16-44: 412



Q10. The tariff only being available to those with a net income below the minimum wage level, irrespective of whether or not they receive benefits
 Base: Low income/<£10k: 138, High income/£50k+: 93; Elderly/60+: 276, Younger/16-44: 412; Males: 410, Females: 590; Families with children 6+: 269, Families with children 0-5: 108



Q10. Those in receipt of the tariff also being offered advice on water efficiency and metering to help them reduce their usage
 Base: 1 person households: 221, 3-4 person households: 382; Water meter: 464, No water meter: 520

MAIN FINDINGS

Willingness to Pay

Approach Used to Determine Willingness to Pay

- The transfer pricing technique was adopted
- Customers are simply asked whether they would be willing to pay a certain amount for a product or service and if they say “no”, they are asked the same, but at a lower cost (or lower bill increase level) and so on; if they say “yes” to the first cost (or bill increase level), they are asked if they would accept it at a slightly higher level, and so on.
- **Benefits:**
 - Simple to design and analyse
 - Easy for customers to understand
 - Customers always have the opportunity to say “no” to an increase
 - Customers always have the opportunity to say they would pay nothing at all

- **Example:**

Yorkshire Water is currently supporting 12,000 of its 2,200,000 customers through the tariff, but there are many more households who could benefit from the social tariff if funding was available, with YW’s latest projections estimating that 270,000 households could be eligible, based on their current criteria. Recent research from the Consumer Council for Water has also found that one in five customers feel their charges are unaffordable, an increase from one in eight customers in 2015.

Yorkshire Water is seeking support for extending the scheme to more customers who are struggling to pay their bills. If the funding was to come from a contribution from their profits of £500,000, as well as a small addition to customers’ bills, would you be willing to pay an additional 97 pence on top of your current bill [£xxx] in order to enable Yorkshire Water to offer WaterSupport to an additional 15,000 customers? Please assume that the following would apply:

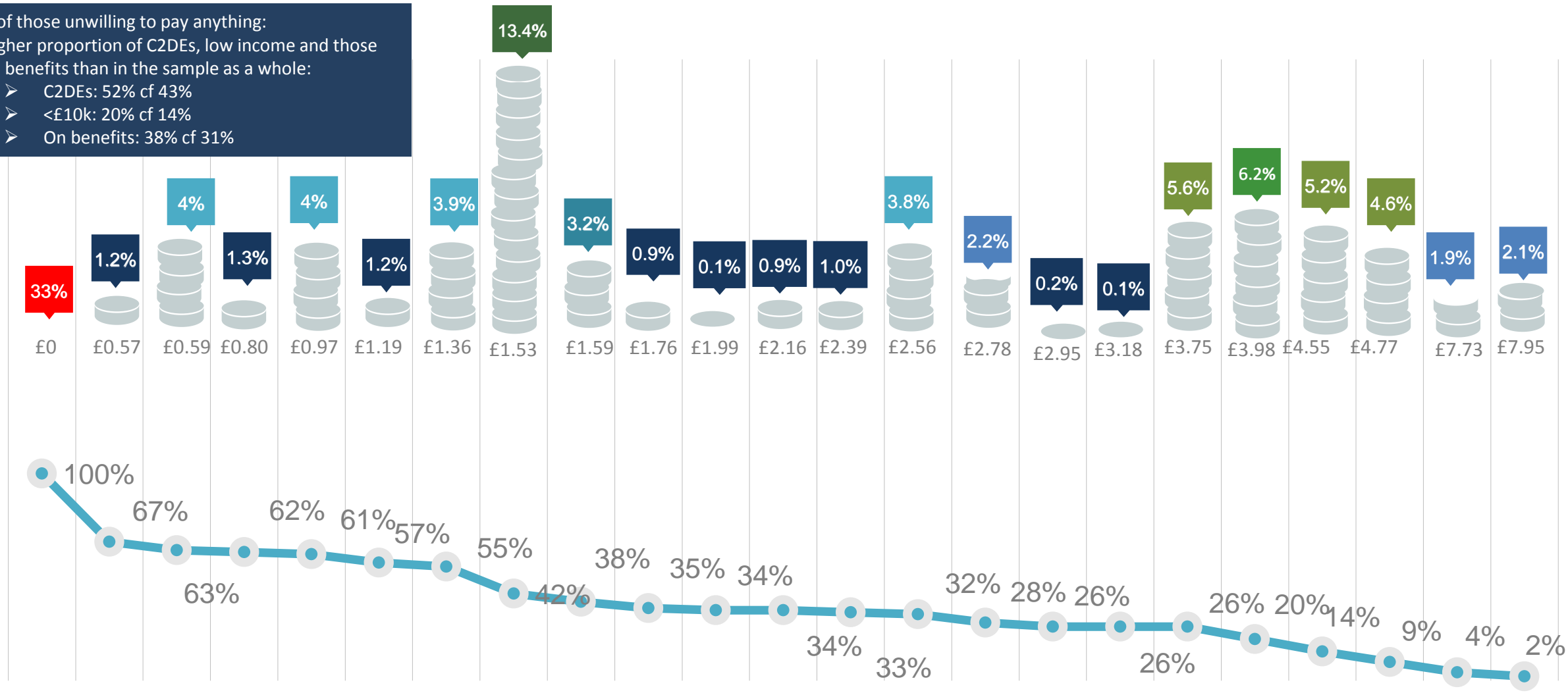
- the tariff would only be available to households that are struggling to pay their water bill, but who are not in arrears with their water bill payments, and would provide an average saving for these customers of £175
- the tariff would only be available to those with a net income below the minimum wage level, irrespective of whether or not they receive benefits
- the tariff would only be available to those with a bill value at least £100 greater than the average bill
- those in receipt of the tariff would also be offered advice on water efficiency and metering to help them reduce their usage
- key customer concerns raised through this survey would be addressed.

- **NOTE:** Whilst half of the sample were asked based upon part of the funding coming from YW profits (as above), half were asked based upon all of the funding coming from customers (i.e. none from YW profits).

Two thirds of all customers asked (with and without part funding by YW) were willing to pay at least an additional 57p to enable WaterSupport to be extended, with just over half willing to pay up to £1.36. Those unwilling to pay anything were more typically C2DEs, low income and those on benefits

Profile of those unwilling to pay anything:

- Higher proportion of C2DEs, low income and those on benefits than in the sample as a whole:
 - C2DEs: 52% cf 43%
 - <£10k: 20% cf 14%
 - On benefits: 38% cf 31%

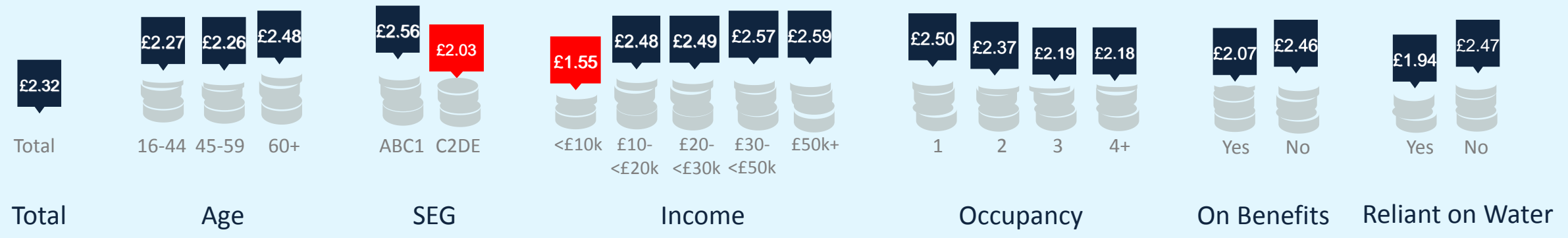


Base: all participants - 1000

Red indicates £0, dark blue indicates a small proportion through to dark green a large proportion

The overall mean willingness to pay, excluding 5% outliers, was £2.32 (again, including those asked the question with and without part funding by YW)

- However, it was significantly lower for those with an annual income of less than £10,000 (£1.55) and C2DEs (£2.03).
- It was also noticeably lower for those on benefits and those with an illness, reliant on water, but not significantly so.



BASES
 Total: all participants - 1,000
 Age: 16-44: 387, 45-59: 299, 60+: 261
 SEG: ABC1: 532, C2DE: 415
 Income: <£10k: 134, £10-£20k: 227, £20-£30k: 208, £30-£50k: 218, £50k+: 84
 Occupancy: 1 person: 209, 2 people: 378, 3 people: 186, 4+ people: 176
 Benefits: On benefits: 322, No benefits: 625
 Reliant on water: Illness, reliant on water: 71, No illness: 661

Red indicates significantly lower %

There was no significant difference in the proportions willing to pay something dependent upon whether they had been told it would be part funded by YW or not (67% and 66% respectively).

- Whilst mean willingness to pay (excluding 5% outliers) did vary slightly, it was actually slightly higher amongst those who had been asked based upon all funding coming from customers only, although the difference between the two means was **not significantly different**.
- Whilst some mean WTP figures by customer segment were higher where they were told it would be part funded by YW, some were lower; however, again, these **differences were not significant**, with one exception for 2 person households.

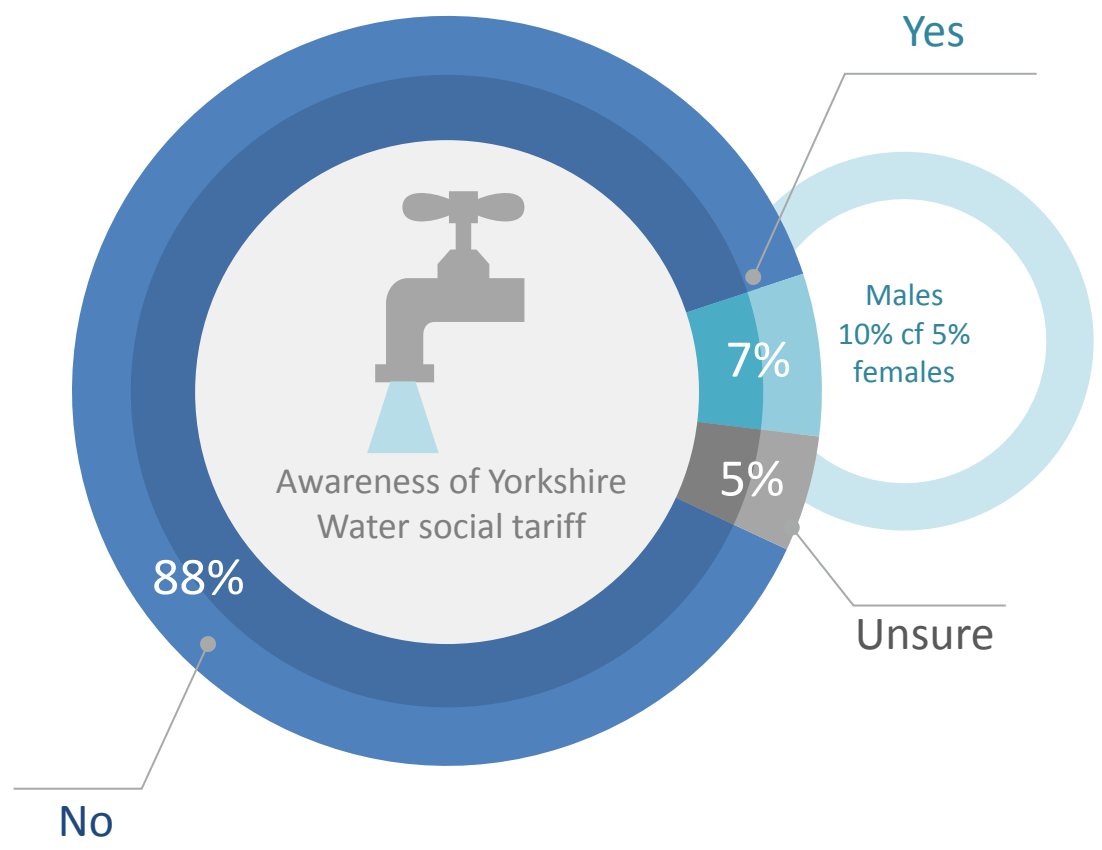


Red indicates significantly lower %

MAIN FINDINGS

Communication

Only 7% of customers were aware that YW offered a social tariff, with the number of males aware significantly higher than the number of females



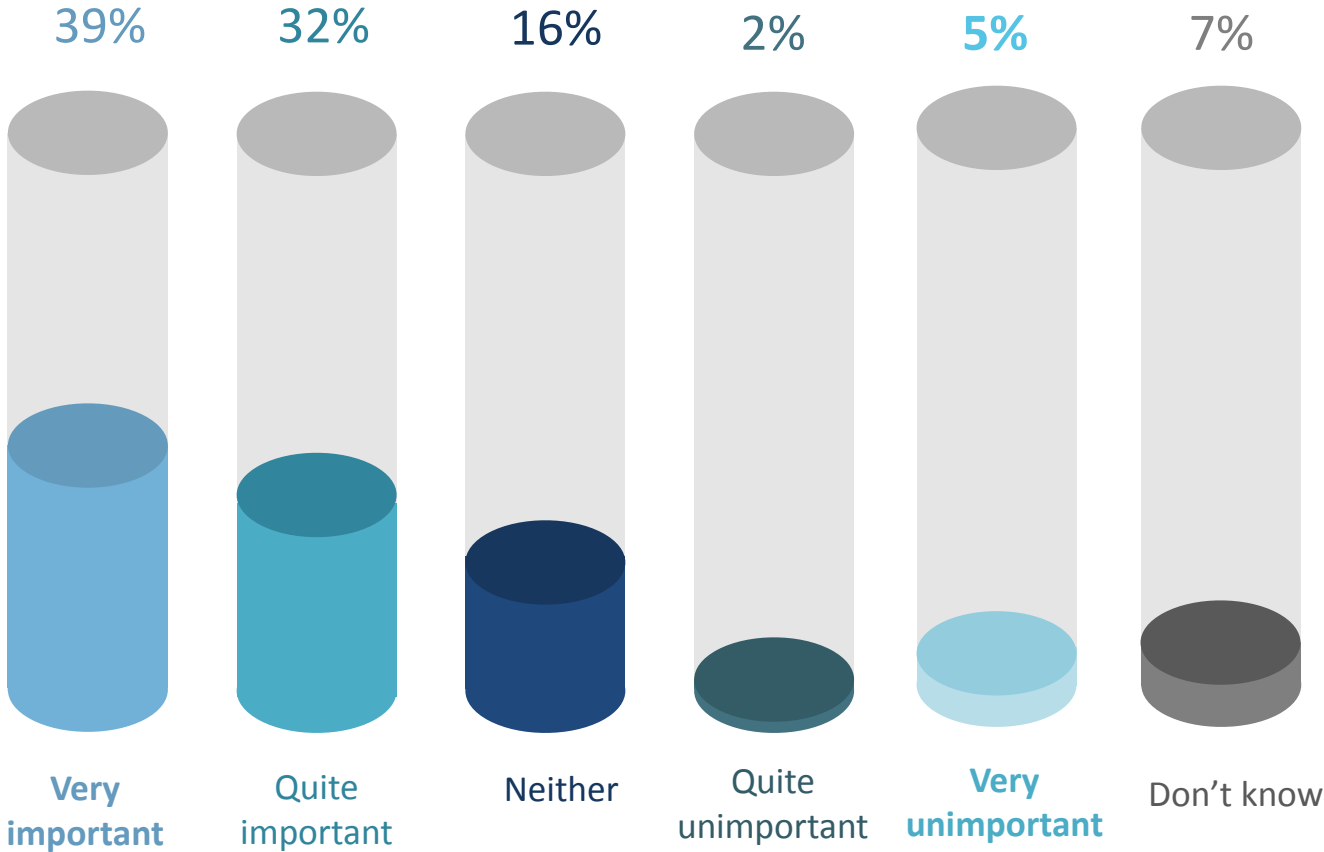
I'd never heard of it! (Male, 45-59, C1C2)

I've never heard of it... I didn't know it was going on... I knew you could get stuff like Warm Zone, but I didn't know about water. (Female, 45-59, DE)

I wasn't even aware that there was a scheme in place for that, and personally, I can't really see anyone worse off than me at the moment." (Female, 25-44, DE)

Q4. In June 2012, the Government published guidelines allowing water companies to introduce social tariffs. Prior to completing this survey, were you aware that Yorkshire Water offered a social tariff (the tariff is called WaterSupport)? BASE: all participants – 1,000

The majority believe that it is important to improve how WaterSupport is advertised, although some have concerns about the cost and potential abuse of the tariff if it's widely advertised



Q17. How important do you think it would be for Yorkshire Water to improve how well its social tariff, WaterSupport, is advertised?

Q17a. Why do you say that?

BASE: all participants – 1,000

The majority believe that it is important to improve how WaterSupport is advertised, although some have concerns about the cost and potential abuse of the tariff if it's widely advertised

Very important

Quite important

Quite unimportant

Very unimportant

Why?

- Need high levels of awareness/ should keep customers updated (32%)
- Should advertise so those in need are aware (29%)

I think everybody needs to be aware, because the people who are paying more on their bills need to be aware of the reason why. (Male, 60-74, AB)

I don't see how they could choose people. (Male, 45-59, DE)

Why Not?

- Should be available but not advertised (7%)
 - Customers shouldn't subsidise advertising (3%)
 - YW should target those on low incomes rather than advertising (3%)
 - If customers are struggling they should ask YW to step in (2%)
 - Should be available in the public domain, but not advertised (<1%)
- Fears of abuse (5%)
 - Everyone will want it is they're made aware (4%)
 - Might make it open to abuse (1%)

There are always people who will take advantage. (Female, 45-59, C1C2)

It would be a waste of money to advertise it to everyone when there's clearly only going to be a target group that need it. (Female, 25-44, AB)

There will be people out there saying "Oh, hang on, I could get a bit of that! I'll just tell a couple of little white lies." (Male, 60-74, AB)

Q17. How important do you think it would be for Yorkshire Water to improve how well its social tariff, WaterSupport, is advertised?

Q17a. Why do you say that? BASE: all participants – 1,000

Depth participants were asked how best to communicate and opinions varied. Some thought with bills, so long as the information stood out, whilst others thought separate letters, social media and/or through 3rd parties. Most believed that more than one method would be needed to reach all different customer types.

Bills	Separate Letter	Social Media	Third Parties Responsible for Money Management & Support
<p>BUT:</p> <p>Needs to stand out and be clear what it's about for people to read it</p> <p>Bills sent once a year so perhaps also need to communicate in other ways</p>	<p>Some more likely to read a separate letter</p> <p>BUT:</p> <p>Needs to be personally addressed, not to 'The Occupier'</p>	<p>A cheap way of getting information out</p> <p>"It saves a tree!"</p> <p>BUT:</p> <p>It won't reach everyone, so also need other ways</p>	<p>Councils</p> <p>Citizen's Advice</p>

If it said "Possible help available with bills" I think people would read it.
(Female, 25-44, AB)

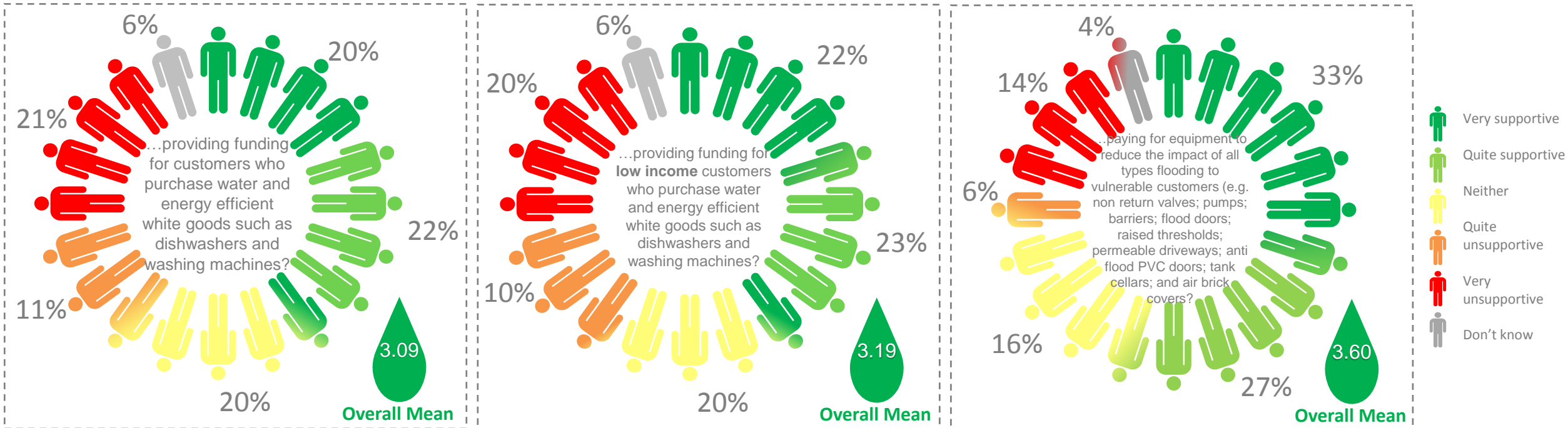
The best way to do it is a couple of ways.
(Male, 45-59, C1C2)

Most agreed that only the basics needed communicating (e.g. summary of eligibility criteria and how it's funded), with reference to the website / contact number where they can get more information if they want it

MAIN FINDINGS

Support for Other Measures

Fewer than half (42%) support providing funding for customers to purchase water and energy efficient white goods, even if just for low income customers (45%); however, there is greater support for equipment to reduce the impact of flooding (60%)



More likely to support

Younger/16-44 (50% very or quite supportive)

More likely to support

Middle income/£10k-<£30k (51% very or quite supportive)

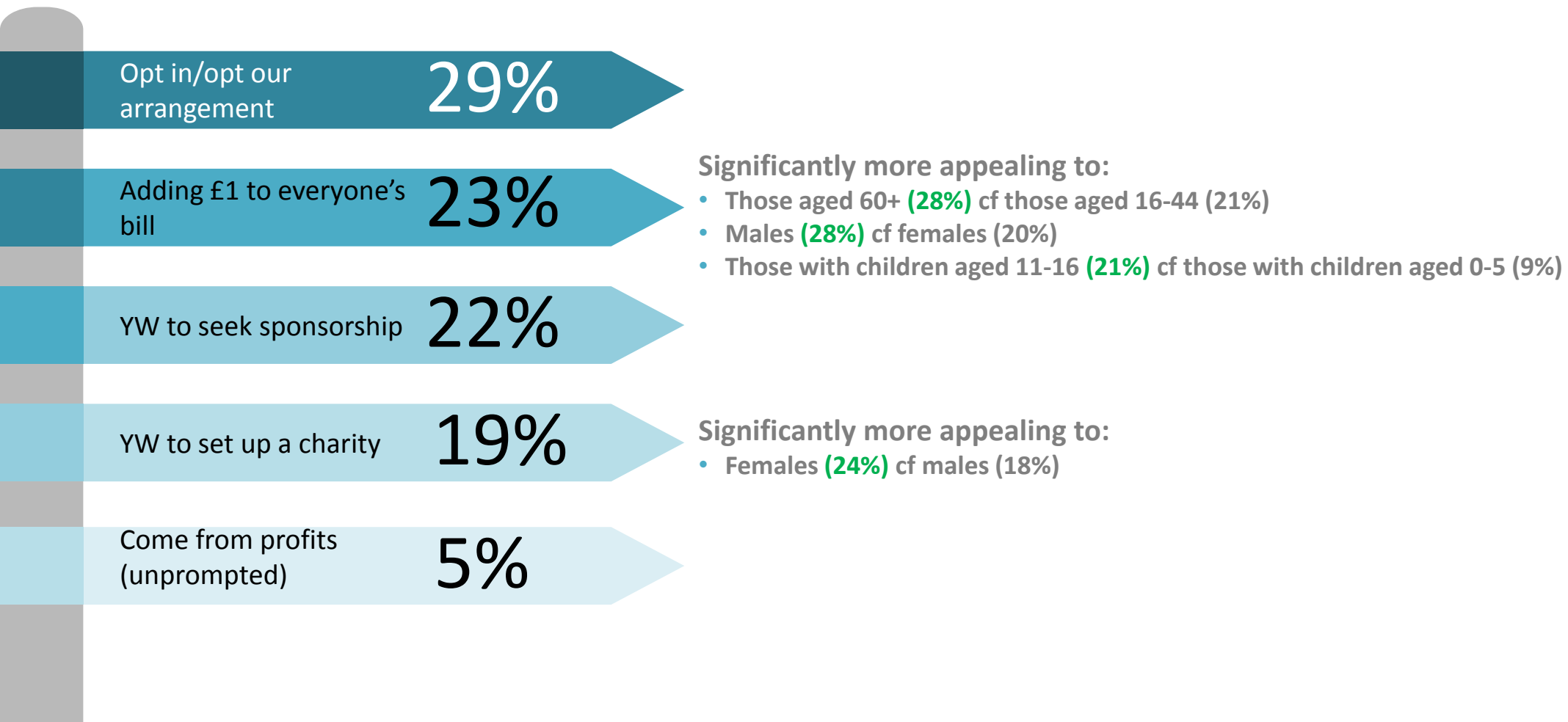
More likely to support

Middle income/£10k-<£30k (64% very or quite supportive)

Q18. Yorkshire Water is considering other ways of supporting customers. If it was to increase your bill by a further £1, to what extent would you be supportive of...

BASE: all participants – 1000; Younger/16-44: 412; Middle income: 458

Having an opt in/opt-out arrangement where customers could agree to pay the extra if they wanted to, with the option to opt out in subsequent years if they no longer wanted to, was the preferred means of funding overall, although almost as many customers favoured adding £1 to everyone's bill



CONCLUSIONS & RECOMMENDATIONS

Conclusions

Attitudes

The majority (77%) **support the principle of social tariffs**, helping those in need (79%) and preventing people getting into arrears (79%)

There is consequently **widespread agreement** that YW should offer a social tariff (75% agree, 50% strongly)

This is highest amongst those more likely to need it (i.e. C2DEs, the low income and those on benefits), although **the greater proportion of all other customer groups agree to it**, most of them strongly

Support drops slightly once cross subsidisation is mentioned; importantly though, it remains high (45% strongly agree and 29% slightly agree, with C2DEs, the low income and those on benefits still most likely to agree)

Concerns & Mitigation

One third (31%) have **some concerns** about YW offering a social tariff, primarily whether it is 'fair' to do so, and concerns about eligibility and 'policing'

Part funding through profits and offering water efficiency advice and metering to recipients has a very **positive effect** on levels of support

Only being available to those with a net income below the minimum wage level, irrespective of whether or not they receive benefits, had **only a small impact** on levels of support, with the depth interviews demonstrating that there are very mixed feelings about who should be eligible

Only being available to those households that are struggling to pay their water bill, but who are not in arrears with their water bill payments, had **very little impact** on levels of support, whilst the tariff only being available to those with a bill value at least £100 greater than the average bill had a **negative impact** on levels of support

Conclusions

Willingness to Pay

The level of agreement with YW offering a social tariff was not wholly matched by willingness to pay for it, with **33% being unwilling to pay anything**

However, two thirds (**67%**) were **willing to pay an additional 57p**, over half (55%) an additional £1.36 and one third (33%) an additional £2.39

Mean WTP was £2.32, but was £1.55 amongst the low income, rising to £2.59 amongst those earning £50k+

Importantly, there was **no significant difference in WTP** amongst those asked to assume it would be solely funded by customers versus those told YW would partially fund it from profits

Communication

Awareness of WaterSupport is currently **very low**; just 7% were aware of it prior to this research

The majority (71%) believed it was **very important to raise awareness**

Additional Support

The greater proportion of customers **support YW paying for equipment to reduce the impact of flooding**; however, there is no consensus on how this should be funded

Fewer than half support YW providing funding towards water and energy efficient white goods

Recommendations

MITIGATION OF CONCERNS & COMMUNICATION

Although not essential in generating willingness to pay, we suggest maximising levels of support by continuing to part-fund the tariff through profits and to offer it alongside water efficiency advice and metering

- make customers aware of this when communicating the social tariff to help mitigate customer concerns about funding and potential non-environmental behavioural impacts

Drop the criteria of the tariff only being available to those with a bill value at least £100 greater than the average bill; consider dropping the criteria of the tariff only being available to those households that are struggling to pay their water bill, but who are not in arrears with their water bill payments, whilst ensuring those in arrears have water saving targets to meet

Concerns about the ‘fairness’ of a social tariff should be addressed by making everyone aware that the tariff is available for those who need it:

- Use a mixed media approach
- Provide a clear route to further information about eligibility and how to apply

Concerns about ‘eligibility’ and ‘policing’ should be addressed through communication to customers and rigorous checks on applicants:

- Customers need to understand who will be eligible and to be comfortable that, as far as possible, it will not be open to abuse
- Consider not only offering it alongside water saving advice, but where water saving targets are met, making it a 2-way thing

Recommendations

COMMUNICATION

Awareness of WaterSupport should be raised generally, not only so those in need of financial help can benefit, but so that customers understand the full make up of their bill

WILLINGNESS TO PAY

We would suggest considering adding £1.36 to the average customer bill as this is close to the average WTP of the low income participants and supported by over half of customers in the survey

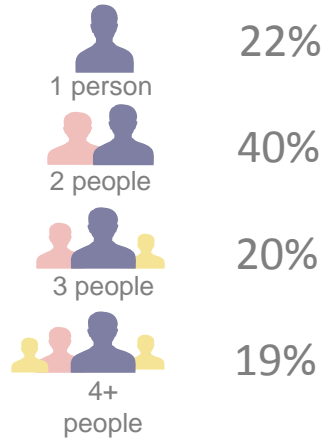
ADDITIONAL SUPPORT

Given the lack of consensus on how to fund additional support measures, coupled with the results on willingness to pay for social tariffs, we would suggest trialling an opt-in/opt out funding scheme for the purchase of equipment to reduce the impact of flooding

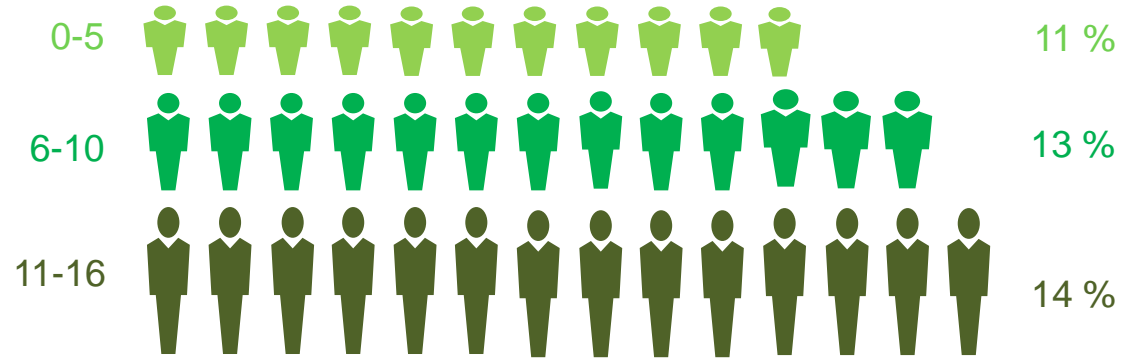
ADDITIONAL SAMPLE CHARACTERISTICS

Additional Quantitative Survey Sample Characteristics

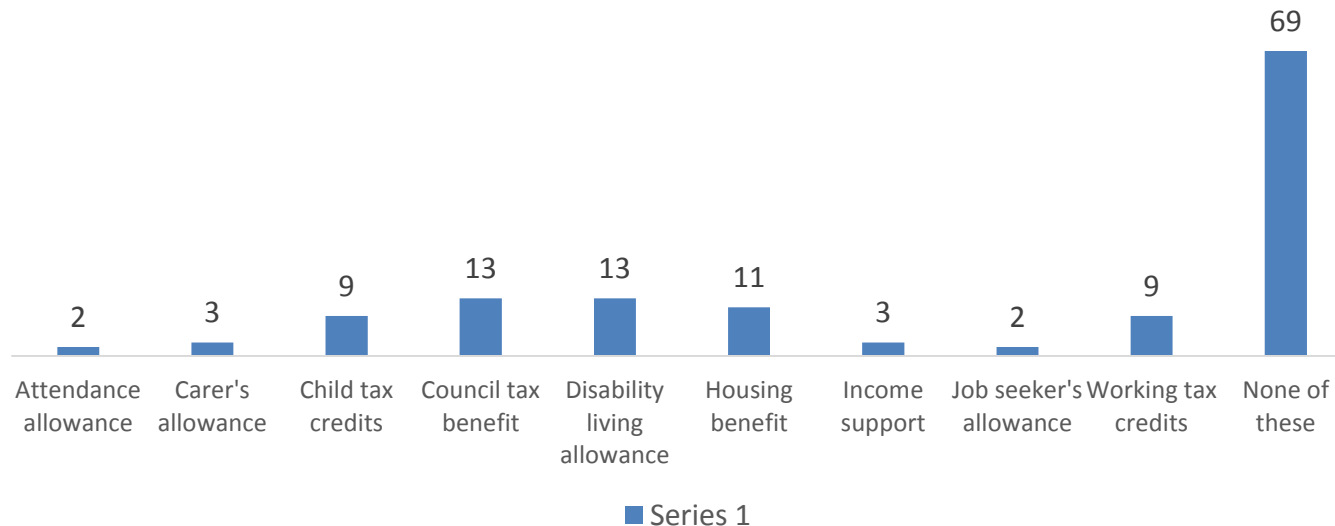
Occupancy



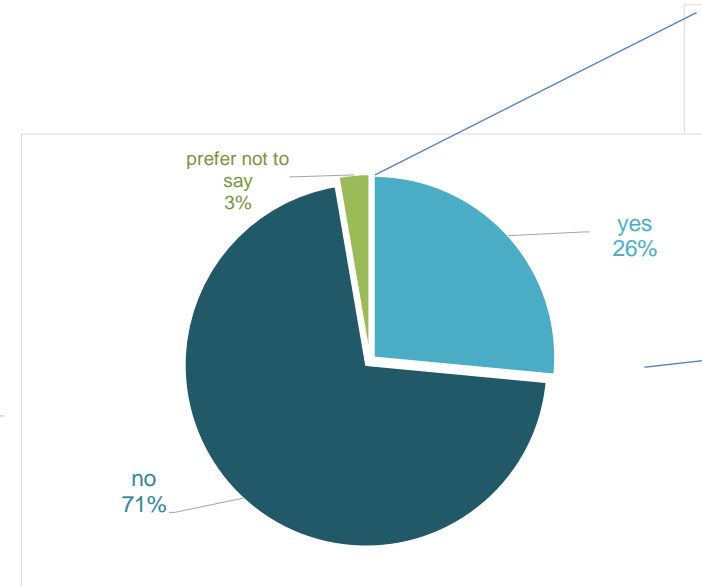
% With Children by Age Band



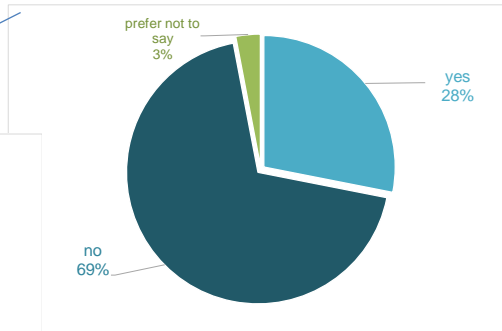
Benefits Received (%)



Anyone Long term Sick

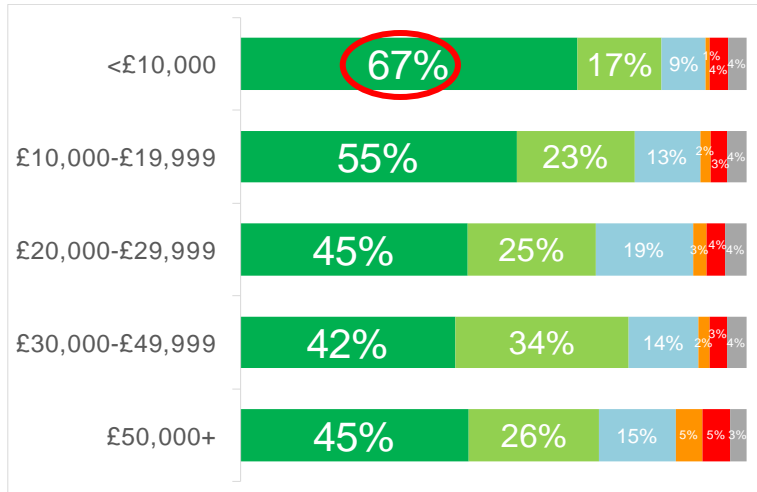


Reliant on Water?

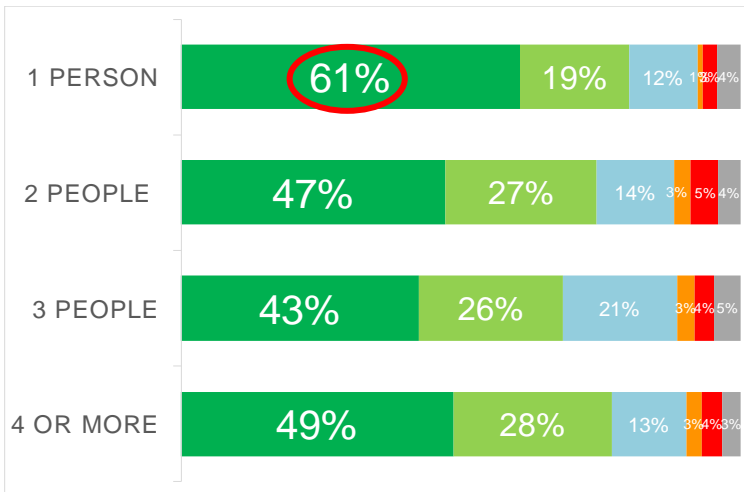


Attitudes Towards Social Tariffs – Significant Differences

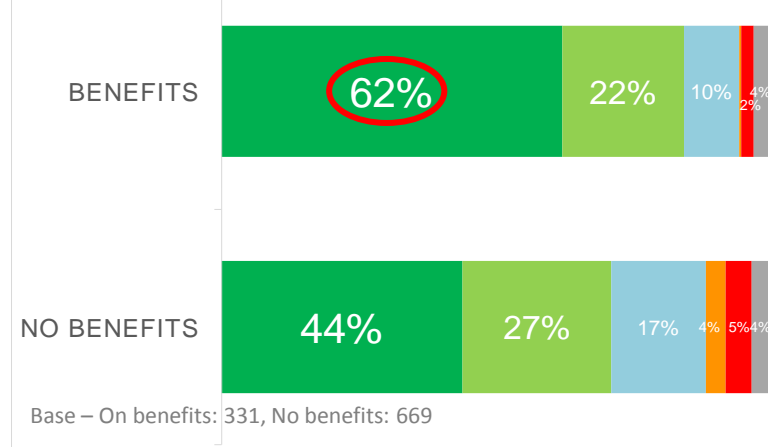
- Support for YW offering a social tariff is higher amongst the low income, single occupant households, those receiving benefits and the long term sick who have a reliance on water



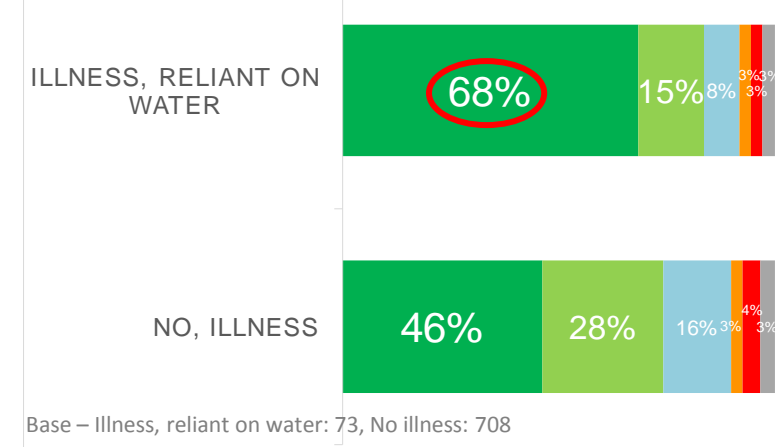
Base - £10k: 138, £10,000-£19,999: 240, £20,000-£29,999: 218, £30,000-£49,999: 233, £50k+: 93



Base – 1 person: 221, 2 people: 397, 3 people: 195, 4 or more: 187



Base – On benefits: 331, No benefits: 669



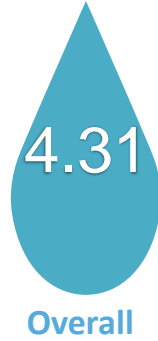
Base – Illness, reliant on water: 73, No illness: 708

The same significant differences were seen when the idea of cross subsidisation was introduced

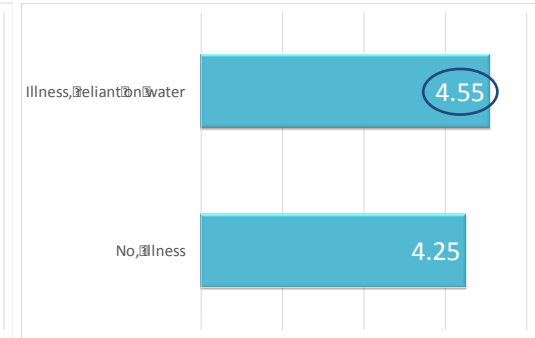
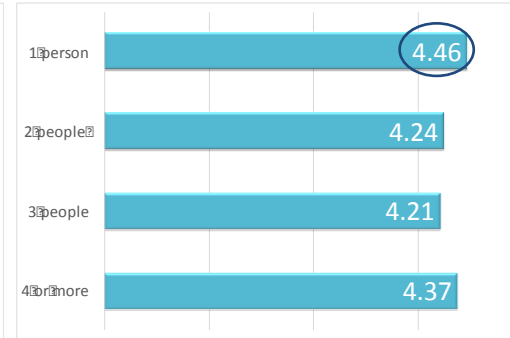
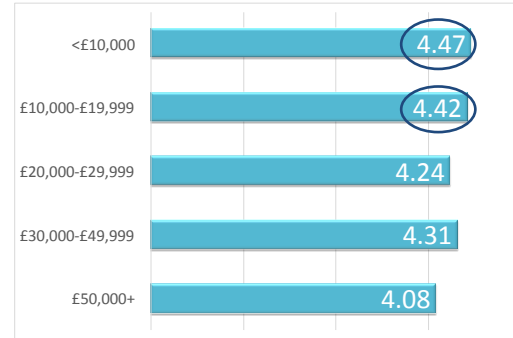
Attitudes Towards Social Tariffs & Impact on YW Brand – Significant Differences (Mean Scores out of 5)

- Levels of agreement were once again significantly higher for low income customers, single occupancy households, those with an illness & reliant on water and those on benefits

It's good to know schemes like this exist if you get into financial difficulties



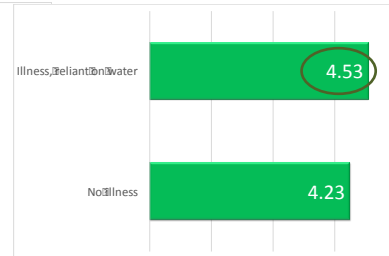
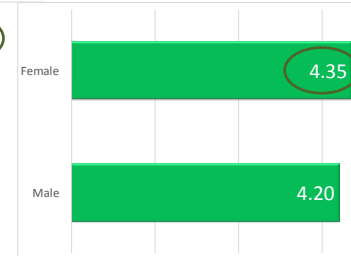
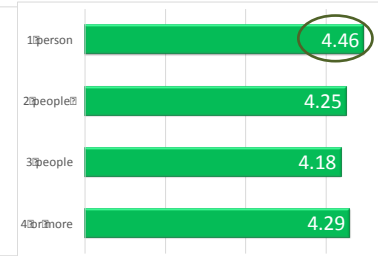
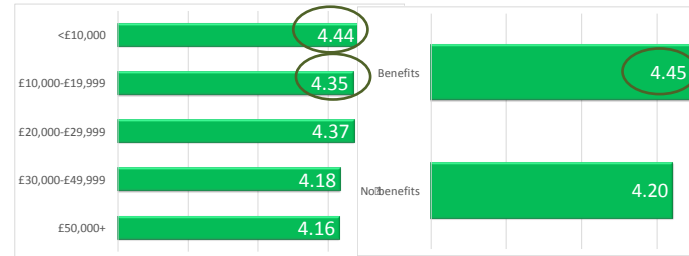
Overall



A scheme like this will help prevent struggling customers going into arrears, which is a good thing



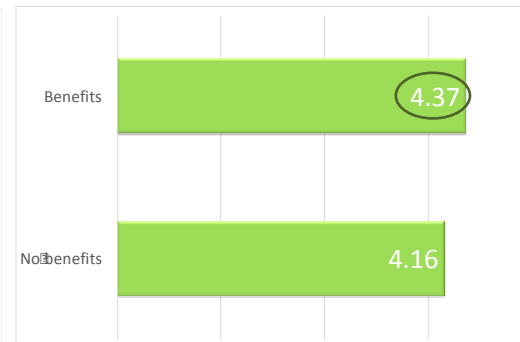
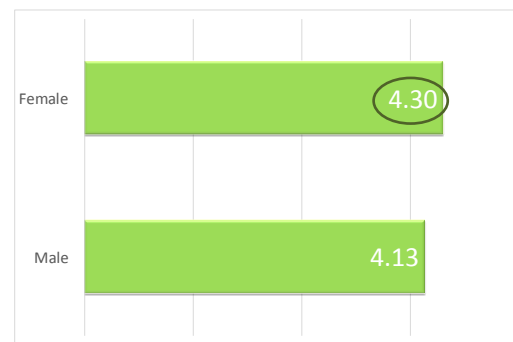
Overall



A scheme like this shows that Yorkshire Water is a responsible company



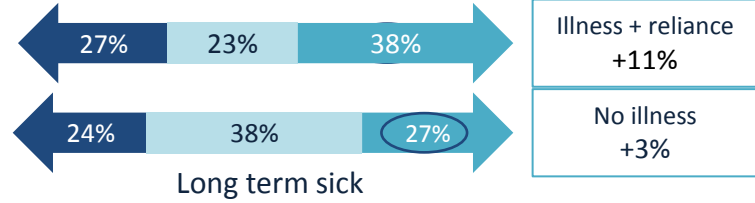
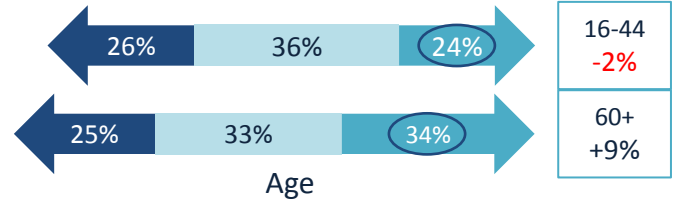
Overall



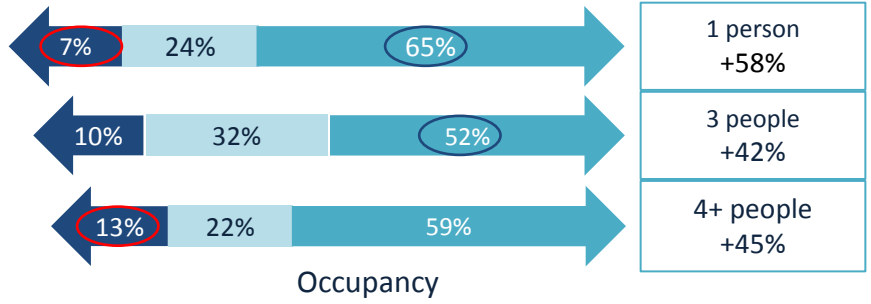
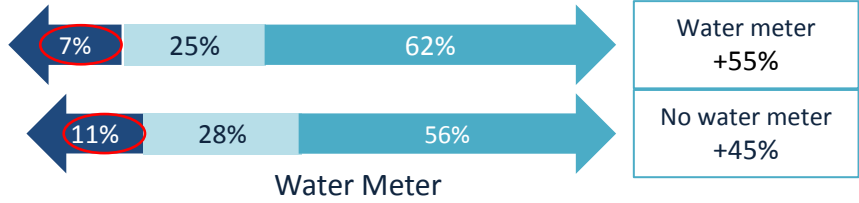
Impact of Prompted Mitigation Measures – Significant Differences



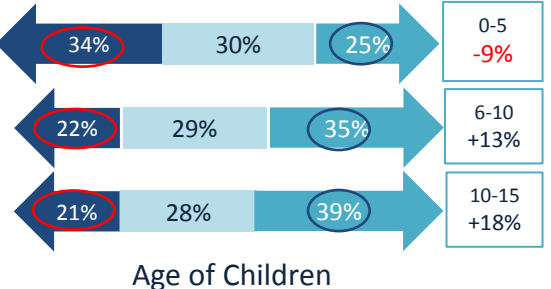
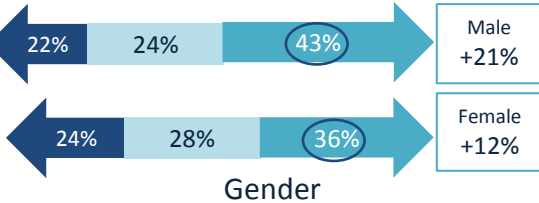
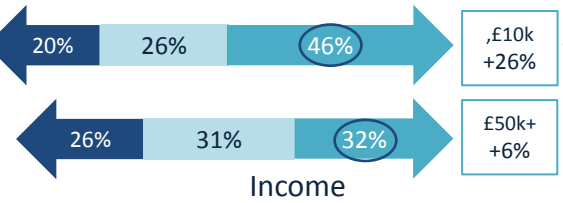
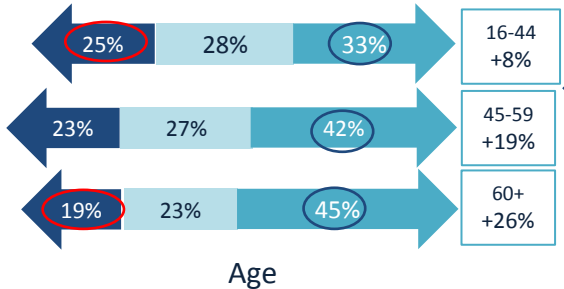
the tariff only being available to those households that are struggling to pay their water bill, but who are not in arrears with their water bill payments



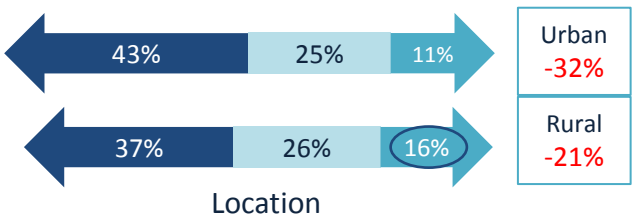
those in receipt of the tariff also being offered advice on water efficiency and metering to help them reduce their usage



the tariff only being available to those with a net income below the minimum wage level, irrespective of whether or not they receive benefits



the tariff only being available to those with a bill value at least £100 greater than the average bill



Location