



YorkshireWater

Accent

# Acceptability and Affordability Testing Quantitative Fieldwork

Final Report

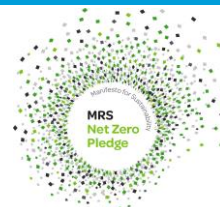
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# 1 Executive Summary

## 1.1 Assurance Statement

This fieldwork was conducted in accordance with the requirements of the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

## 1.2 Methodology and Fieldwork

2,378 interviews were achieved overall. 2,175<sup>1</sup> Household (HH) interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). 571 interviews were generated by an email approach), 1,604 by post.

203<sup>2</sup> Non-Household (NHH) interviews were conducted. They were split 153 by specialist panel and 50 CATI.

## 1.3 Summary of Results

### Economic Outlook

The economic situation for households in particular was found to be tough – with 40% of households reporting having had at least some difficulty with paying household bills (and 14% of households stating that it was very or fairly difficult to manage financially). 39% of households expect their financial situation to worsen in the next few years.

The economic situation for businesses seemed almost as pressured – with 34% of non-household participants reporting at least some difficulty paying bills and 42% currently finding it difficult to manage financially. However, the outlook was better, with 52% of businesses expecting the situation to improve and only 19% expecting it to worsen.

### Affordability

Overall, roughly 1 in 5 participants (22%) said it would be fairly or very easy to afford the proposed bill (17% of households and 33% of non-households). 33% of participants (34% of households and 31% of non-households) stated that the bill increase would be neither easy nor difficult to afford. 42% of participants (45% of households and 34% of non-households) said the bill increases would be either fairly or very difficult to afford.

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<sup>1</sup> Against an Ofwat/CCW mandated minimum of 500

<sup>2</sup> Against an Ofwat/CCW mandated minimum of 200

Lower income households found the bills particularly difficult to afford, with 62% of households with an income up to £10,399 finding the increases very or fairly difficult to afford. Affordability was higher amongst metered users (20%) than unmetered users (12%).

## Acceptability

The proportion of participants that found the proposed bill acceptable or completely acceptable was 78% overall, with 15% labelling the plan unacceptable or completely unacceptable, and 7% not knowing/unable to say.

72% of household participants found the plan acceptable (either fairly or very), with 18% finding the plan unacceptable and 10% unable to say. Customers that found the plan to be acceptable support what Yorkshire Water is trying to do long term (54%), feel like their plans are focusing on the right services (35%) and trust Yorkshire Water to do what is best for their customers (22%). The main reasons for household participants finding the plan unacceptable were mainly financially driven; company profits were too high (40%), companies should pay for service improvements (39%), and the bill increase being too expensive (36%), being the top three responses.

The number of non-household participants that found the plan acceptable or completely acceptable was significantly higher at 91% (and correspondingly a significantly lower percentage of non-households stating that the plan was unacceptable (9%)). No non-households were unable to say. Similarly to household customers, businesses find the plan acceptable because they support what they are trying to do long term (41%), feel the plan focusses on the right services (33%) and trust that Yorkshire Water are doing what is best for customers (27%). Again, the main reasons for non-household unacceptability were similar to those of household customers. The top 3 reasons being: the bill increase being too expensive (61%), not trusting the company to make these service improvements (27%), and not being able to afford this (26%).

## Top Priorities for investment

Reducing leakage was the top water related investment priority for both household participants (49%) and non-household participants (35%). Preventing issues with the quality of water was second with a similar proportion of household (35%) and non-household (33%) customers choosing it. Reducing the duration of interruptions was chosen as the third water related enhancement, however three times as many non-household (31%) participants chose this than household participants (10%).

Reducing the number of incidents of sewage flooding inside properties was the top wastewater related priority for both household (36%) and non-household (56%) participants (significantly higher among non-household). Reduction of the number of pollution incidents was rated second, however a significantly higher number of household participants (45%) chose this compared to non-household participants (28%).

Reducing sewage flooding in gardens and outbuildings was rated third for both household (12%) and non-household (16%) participants.

The 6 enhancement cases were presented in 2 banks of 3 cases each. The first 3 cases were:

- Drinking Water Quality & Security,
- Water Resources Management Plan (WRMP) & Water Industry National Environment Programme (WINEP), and
- Storm overflows

Drinking Water Quality & Security was the clear priority of both audiences – with 58% of household participants and 65% of non-household participants choosing it as being most important.

The second bank of cases were:

- Further increasing resilience to flooding,
- Further increasing water supply resilience,
- Net Zero Carbon.

Further increasing resilience to flooding was the clear priority of both audiences – with 44% of household participants and 48% of non-household participants choosing it as being most important.

### Intergenerational Fairness

Both household and non-household audiences would prefer increases to start sooner and be better spread across different generations of bill payers (43% and 64% of responses respectively).

A remarkably large proportion of household customers (40%) said they didn't know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.

Just 17% of household participants, and 25% of non-household participants, chose to delay increases and pass more of them on to younger and future bill payers.

## 2 INTRODUCTION

### 2.1 Background

Every five years Yorkshire Water must submit a Business Plan to Ofwat, the industry regulator. This plan outlines how Yorkshire Water will undertake its operations over the coming five-year period and how much it will charge its customers to deliver this plan. This process is known as the Price Review. Yorkshire Water are in the process of creating their business plan for 2025-2030, and this planning phase is commonly known in the industry as PR24.

Customers wants and needs are, and have always been, at the heart of the Yorkshire Water business plan. Customer insight is gathered through extensive customer research studies to understand customers thoughts on Yorkshire Water's service and aspirations for their operations. This insight shapes the direction of travel for the wide range of services offered by the business.

Yorkshire Water and all other water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting their plans for the upcoming Price Review (PR24) in October 2023.

To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken. This guidance has been designed to facilitate consistency and comparability between companies (e.g. question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme).

Yorkshire Water have commissioned Accent to carry out the quantitative component of affordability and acceptability testing (AAT) with their customers. This report represents the findings from the quantitative stage.

### 2.2 Objectives

The overarching objective of this research is to measure customer support for the PR24 Business Plan.

More specifically, the research aims to:

- Ensure that customers' priorities and preferences are driving Yorkshire Water PR24 investment plan decisions where appropriate.
- Provide evidence to demonstrate that customers consider the forecast bill impacts to be acceptable, including on affordability, levels of service and operational risk in the short and long term.

- Demonstrate that the engagement with customers reflects the potential affordability impacts.
- Measure intergenerational fairness attitudes when it comes to bill increases and investment.
- Follow the prescribed Ofwat/CCW guidance.

## 2.3 Report Structure

This document is the report on the quantitative stage of the affordability and acceptability testing for Yorkshire Water. This report describes survey design and methodologies alongside customers' view on the affordability and acceptability of Yorkshire Water's AMP8 business plan.

Accent conforms to the requirements of the quality management system ISO 20252:2019.

## 2.4 Economic/media backdrop

This research was conducted against a backdrop of difficult circumstances for the economy, and with the water industry repeatedly making headline news for negative reasons.

Since late 2021, a large proportion of the UK population have been feeling the effects of the cost-of-living crisis. This has meant that households typically have less disposable income and Yorkshire Water customers may be feeling more financially squeezed than normal.

In May 2023 (and in reaction to public anger regarding stories of water companies releasing raw sewage into the UK waterways, a number of actions were taken within the industry.

- Several CEOs of water suppliers (Yorkshire Water, Thames Water and South West Water) declined to accept their usual bonuses due to poor performance (water company exec bonuses having been subject to much media scrutiny and public discontent).
- A joint apology was offered to the public for not acting quickly enough to prevent sewage spills, with a promise to increase investment to prevent spills in future to £10bn by 2030. However, some criticism was received due to this increased investment being funded by customers' bills.

At the end of June, the CEO of Thames Water resigned. It was revealed that the company was in £14bn of debt and there were fears it was on the verge of collapse. On August 9<sup>th</sup> the news headlines featured 6 water companies (including Yorkshire Water)



which could be facing £800m in lawsuits over allegations of underreporting pollution incidents and overcharging customers.

# 3 METHODOLOGY

## 3.1 Introduction

Generally speaking, the methodology was heavily prescribed by the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

Having said that, the guidance changed and was clarified frequently throughout the research period. In all respects (unless documented within this report) the guidance in effect at the time was consistently followed.

Yorkshire Water’s Independent Challenge Group (ICG) was informed and consulted throughout the research process, including inception, design, and fieldwork.

## 3.2 Cognitive testing

Comprehensive cognitive testing was carried out. 10 household and 5 non-household cognitive interviews were carried out using Zoom with the participant filling in the online survey and an Accent moderator observing and probing.

Findings were presented to Yorkshire Water’s ICG, and all changes resulting from the cognitive testing process were implemented with ICG approval. The full report can be found in Appendix G.

## 3.3 Sampling and approach

### Household (HH) sampling

The Yorkshire Water region was treated as a single location, all of which is dual supplied by Yorkshire Water. The target number of interviews was 1500<sup>3</sup>. Recruitment was using Yorkshire Water customer lists with flags for their priority services register (PSR) and social tariff.

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation. Primarily, the recruitment used a push-to-web approach with online survey links and QR

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<sup>3</sup> The minimum sample size listed in the guidance issued by Ofwat and CCW was 500.

codes provided in the letter and email invitations. Participants were also offered the opportunity to make any accessibility requests (including requesting a paper version of the questionnaire to fill in and post back) – 197 such requests were received and honoured.

The guidance mandates that areas of differing deprivation (as defined by the Index of Multiple Deprivation (IMD)) be boosted or suppressed by certain percentages, to account for lower response rates amongst more deprived areas and their importance in the research. The process by which this component of the guidance was followed, was to effectively convert the percentage given in the guidance to an ‘adjustment factor’, to sample by IMD decile naturally (using a consistent assumed response rate) and then adjust the number of selections by the adjustment factor. Where the IMD decile was not known, no adjustment was applied. The calculations used to define the sample for the research (and from which all sub-sampling was conducted), follows:

IMD Decile	Domestic Properties Served	%	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	adjustment factor	<b><i>Sample to be drawn (adjusted)</i></b>
1	331288	17.81%	267	3%	8905	1.25	<b>11131</b>
2	200166	10.76%	161	3%	5380	1.25	<b>6725</b>
3	180371	9.70%	145	3%	4848	1.1	<b>5333</b>
4	148164	7.97%	119	3%	3983	1.1	<b>4381</b>
5	159082	8.55%	128	3%	4276	1	<b>4276</b>
6	176328	9.48%	142	3%	4740	1	<b>4740</b>
7	185910	9.99%	150	3%	4997	0.9	<b>4497</b>
8	174407	9.38%	141	3%	4688	0.9	<b>4219</b>
9	148535	7.99%	120	3%	3993	0.75	<b>2994</b>
10	147904	7.95%	119	3%	3976	0.75	<b>2982</b>
Unknown	7992	0.43%	6	3%	215	1	<b>215</b>
<b>TOTAL</b>	<b>1860147</b>		<b>1500</b>		<b>50000</b>		<b>51494</b>

This ensured that the selection (a) matched the profile of the Yorkshire Water area, and (b) boosted each IMD decile appropriately in line with the guidance.

Sample Exclusions were kept to a minimum:

- Deceased customers
- Bill amounts < £3.50 (including zero bills)
- Single Supply properties

No quotas were set (in line with the Ofwat and CCW guidance).

## Household (HH) Fieldwork

An initial sub-sample was drawn from the sample, based on a much more optimistic response rate than that used for the overall sample extract (just under 5%, based on previous comparable work), to ensure we did not invite more participants than was necessary. The proportions by IMD decile as defined above, were maintained. Records with an email address were sent a single email, records without, a letter.

Responses to these mailings follow:

Interviews wanted	1500		
Assumed %	5.00%		
n=	30000		
IMD Decile	Total	email	Post
1	6475	1254	5221
2	3915	778	3137
3	3106	620	2486
4	2549	524	2025
5	2490	518	1972
6	2759	565	2194
7	2618	528	2090
8	2456	482	1974
9	1743	297	1446
10	1737	331	1406
Unknown	125	62	63
TOTAL	29973	5959	24014
Interviews after initial mailing	2175	571	1604
Conversion rate after initial mailing	7.26%	9.58%	6.68%

We far exceeded the full target of 1500 interviews and hence did not require, nor therefore send, any reminders.

## Non-Household (NHH) sampling and fieldwork

A target of 200 Non-household interviews was set<sup>4</sup>, non-household bill-payers were recruited from a mix of sample sources, and interviewed by a variety of means:

Commercial panel (online):

Quest Mindshare (a specialist non-household panel) was used for this component. A total of 153 interviews were obtained via this method.

Purchased business lists (CATI):

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<sup>4</sup> The minimum NHH sample size listed in the guidance is 200.

Sample of appropriate businesses was purchased from Sample Answers. Participants were contacted by phone and recruited to take part. All participants viewed materials (including a personalised bill graph based on their own bill amount, and service enhancement slides) at the time of interview. 50 interviews were achieved via this means. Sample statistics follow:

No. In Sample	Exhausted	Still Live	Unused	Recruited (inc. Lost)	Interviewed
2929	1252	1677	0	64	50

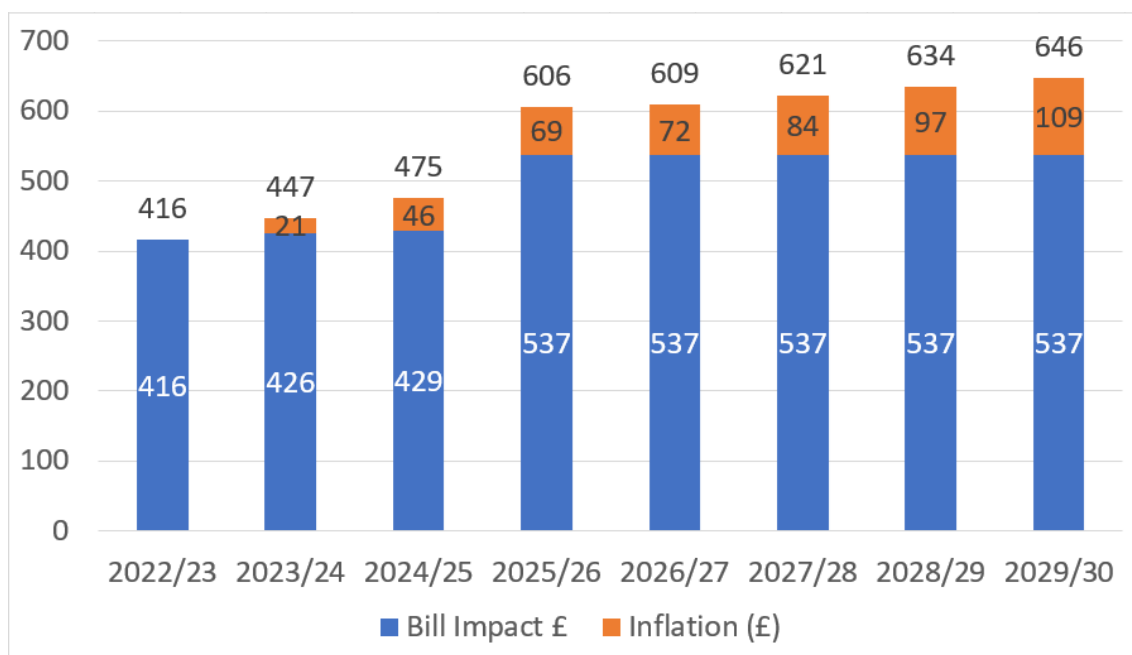
Thus, 203 non-household interviews were conducted.

## Survey

The questionnaire itself was generally tightly prescribed and in the main was implemented precisely as mandated.

The exception to this, was the bill chart graph, where following cognitive feedback it was decided that it would benefit comprehension if a total (of bill impact plus inflation) were added above each bar on the graph showing the impact of the plan on bills. This was added with the approval of Yorkshire Water's Independent Challenge Group.

Examples follow (based on the average bill amount, and showing the actual increases tested):



## 3.4 Fieldwork dates

Household and Non-Household interviews took place simultaneously. Fieldwork commenced on the 11<sup>th</sup> of August 2023 and closed on the 12<sup>th</sup> of September 2023.

## 3.5 Data processing

Once fieldwork was completed, the resulting dataset was cleaned to remove poor quality responses (including suspiciously low interview durations (speeders), those clearly choosing the first answer code in all questions even when that meant contradictory responses (straight liners), multiple responses from the same IP address etc).

As mandated by Ofwat, data was checked to ensure that no interview was completed in a time of less than 1/3 of the median interview duration.

### Weighting

SPSS was used to run RIM weighting (Random Iterative Methods, or “Raking”).

Household survey responses were weighted to the following targets (using figures derived from neighbourhood level Census data (2021)):

Age		Gender	
Age 16 to 24	4.3%	Male	49%
Age 25 to 34	14.1%	Female	51%
Age 35 to 49	28.9%	Total	100%
Age 50 to 64	26.4%		
Age 65 to 74	12.7%	IMD Decile	
Age 75 and over	13.5%	1	17.8%
Total	100.0%	2	10.8%
		3	9.7%
Ethnicity		4	8.0%
Asian	9%	5	8.6%
Black	2%	6	9.5%
White	86%	7	10.0%
Mixed Ethnic	2%	8	9.4%
Other	1%	9	8.0%
Total	100%	10	8.0%
		Unknown	0.4%
		Total	100.0%

Non-household survey responses were weighted to the following targets (using data derived from BEIS (Department for Business, Energy and Industrial Strategy) 2022):

Employee Size	
Zero employees	15%
1 to 49 employees	32%
50 to 249 employees	14%
250 + employees	39%
Total	100%

Finally, the household and non-household datasets were merged to the following proportions based on total water usage of the two customer types, using data from table 6B of the water company's 2022/23 Annual Performance Report):

Line description	Input MI/d	Split
Total household consumption (excluding supply pipe leakage)	670.75	70.75%
Total non-household consumption (excluding supply pipe leakage)	277.29	29.25%

# 4 FINDINGS

## 4.1 Introduction

The following section of this report details the findings of the study.



## 4.2 Household Demographics

2,175 Yorkshire Water customers took part in the Affordability and Acceptability Testing research. 571 responded to our email invitation and 1,604 to our postal invitations. This is how their profiles fell out (pre weighting). Percentages may not add up to 100 due to rounding.

### Gender

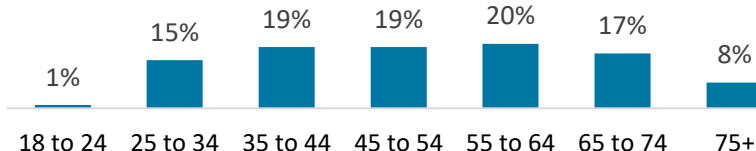


**Female 52% Male 46%**

2% prefer not to say

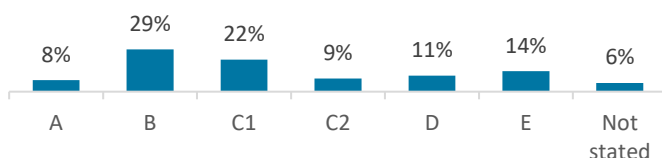
Census = 51% female, 49% male

### Age



Census = 19% 18-29, 57% 30-64, 24% 65+.

### Social Grade



Census = 20% AB/52% C1C2/29% DE.

### IMD decile

1	<b>19%</b>
2	<b>10%</b>
3	<b>10%</b>
4	<b>8%</b>
5	<b>9%</b>
6	<b>10%</b>
7	<b>11%</b>
8	<b>10%</b>
9	<b>7%</b>
10	<b>6%</b>
Unknown	<b>1%</b>

### Region

West Yorkshire	<b>44%</b>
East Yorkshire	<b>13%</b>
South Yorkshire	<b>28%</b>
North Yorkshire	<b>16%</b>

### Ethnicity

English, Welsh, Scottish, Northern Irish or British	<b>87%</b>
Any other White background	<b>3%</b>
Pakistani	<b>2%</b>
White and Black Caribbean	<b>1%</b>
Indian	<b>1%</b>
Any other Asian background	<b>1%</b>
African	<b>1%</b>
Prefer not to say	<b>2%</b>

Census = 90% white/6% Asian/2% mixed/1% black.

### Vulnerability

... is disabled or suffer(s) from a debilitating illness	<b>20%</b>
... have/has a learning difficulty	<b>6%</b>
... relies on water for medical reasons	<b>7%</b>
... is visually impaired	<b>3%</b>
... am/is over the age of 75 years old	<b>9%</b>
... speaks English as a second language	<b>5%</b>
... is deaf or hard of hearing	<b>8%</b>
... is a new parent	<b>5%</b>
None of these apply to me	<b>53%</b>
Prefer not to say	<b>5%</b>

## 4.3 Non-household Demographics

203 Yorkshire Water business customers took part in the Affordability and Acceptability Testing research. 153 were reached through panel and 50 through CATI. This is how their profiles fell out.

Percentages may not add up to 100 due to rounding.

### Main use of water on premises

For normal domestic use for your organisation`s customers and employees	<b>76%</b>
For the supply of services your organisation provides	<b>40%</b>
For an ingredient or part of the product or service your organisation provides	<b>27%</b>
For the manufacturing process which is essential to the running of your organisation	<b>19%</b>
None of the above	<b>1%</b>
Don`t Know	<b>1%</b>

### Number of business sites

1	45%
2	13%
3	9%
4	5%
5 to 10	12%
11 to 50	7%
51 to 250	6%
250	1%
Prefer not to say	1%

### Number of employees

0 (sole trader)	5%
1 to 9 employees (micro)	20%
10 to 49 employees (small)	20%
50 to 249 employees (medium)	32%
250+ employees (large)	23%

### Region

West Yorkshire	44%
East Yorkshire	14%
South Yorkshire	23%
North Yorkshire	11%
Not stated	8%

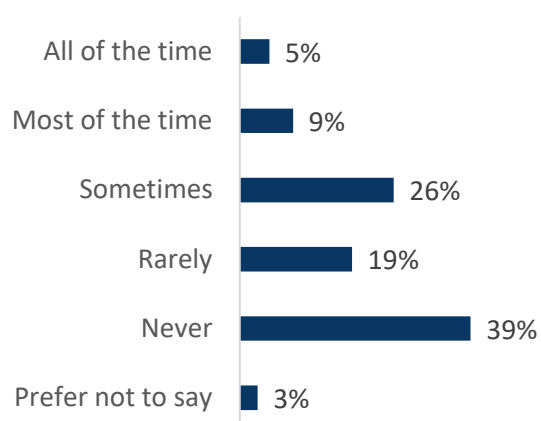
### Industry

Wholesale and retail trade	16%	Energy or water service & supply	3%
Manufacturing	13%	Transport and storage	3%
Education	12%	Public administration and defence	3%
Human health and social work activities	10%	Arts, entertainment and recreation	3%
IT and Communication	7%	Other service activities	3%
Construction	5%	Agriculture, forestry and fishing	1%
Hotels & catering	4%	Real estate activities	1%
Finance and insurance activities	4%	Other	5%
Professional, scientific and technical activities	4%		

## 4.4 Household Financial Temperature Check

Close to 2 in 5 (39%) of those we spoke to say they never struggle to pay their bill, however the same amount do (39%), at least sometimes. Females in particular struggle to pay their bill at least sometimes, with 50% saying they did (compared to 28% of males, this is a statistically significant difference). A similar result was seen with the lower Socio-Economic Grade (SEG) DE, where 62% say they are struggling to pay at least sometimes (a significantly higher proportion than those in SEG AB (25%) and C1C2 (39%)).

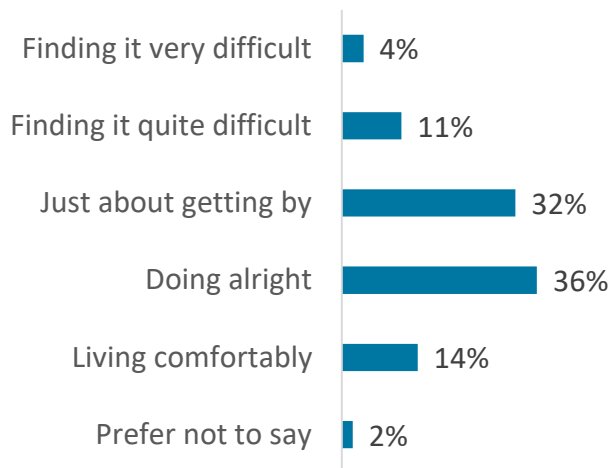
**Figure 1. Q9 Thinking about your finances over the last year, how often, if at all, has your household struggled to pay at least one of its bills.**



Base: All HH participants weighted base (1,682)

Given the current economic situation it is perhaps unsurprising that almost half (47%) of the households we spoke to are finding it difficult to manage financially or are just about getting by. Again, females (56%) are significantly more likely to be struggling to manage financially compared to (39%) males. 53% of those that self-selected as vulnerable, and 69% of SEG DE also struggle managing their finances – statistically significantly when compared to those non vulnerable (41%) and other social grades (AB 32%; C1C2 - 48%)

**Figure 2. Q10 Overall, how well would you say you are managing financially now?**

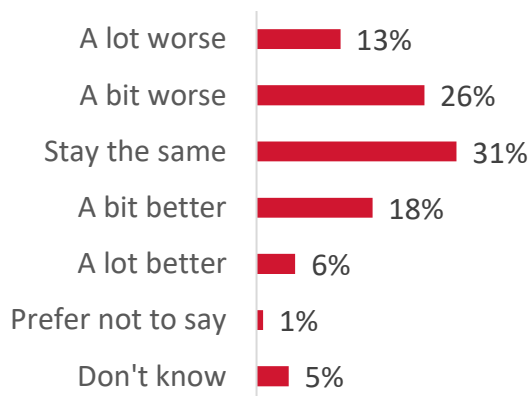


Base: All HH participants weighted base (1,682)

Close to 2 in 5 households (39%) expect their financial situation to worsen in the next few years.

This increases to 45% among those that already have difficulties paying their bills

**Figure 3 Q11 Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get?**

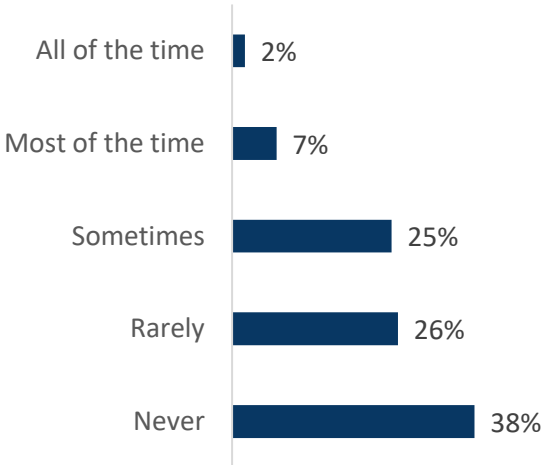


Base: All HH participants weighted base (1,682)

## 4.5 Non-household Financial Temperature Check

Close to 2 in 5 businesses (38%) say they never struggle to pay their bills. However, a third do have some difficulty paying their bills (34%).

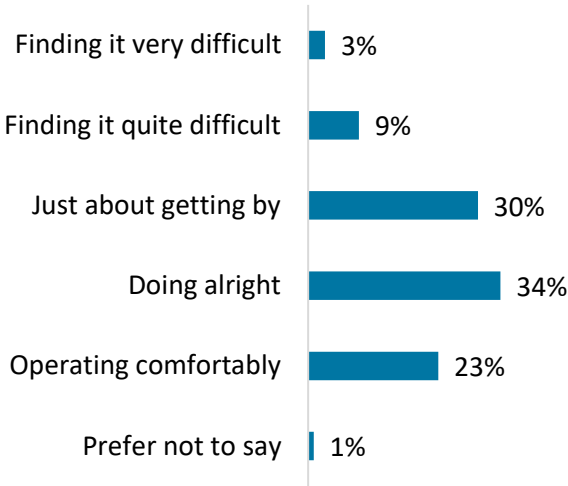
**Figure 4. Q9 Thinking about your finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills.**



Base: All NHH participants weighted base (696)

Over 2 in 5 businesses (42%) are operating with financial difficulty, and only a quarter (23%) say they are operating comfortably.

**Figure 5. Q10 Overall, how well would you say your organisation is managing financially now?**

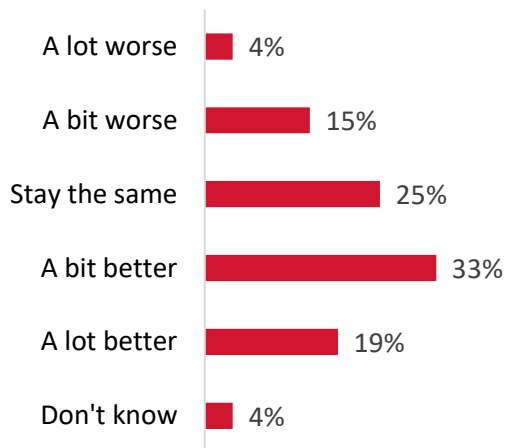


Base: All NHH participants weighted base (696)

Over half the businesses (52%) expect their financial situation to improve in the years to come, only 1 in 5 (19%) are expecting it to worsen.

The expectancy of the financial situation to worsen increases to 33% for businesses that currently have difficulties paying their bills.

Figure 6 - Q11 Thinking about your household/organisation's financial situation over the next few years up to 2030, do you expect it to get:



Base: All NHH participants weighted base (696)

## 4.6 Affordability

The prevalence of participants stating that the proposed bill increases would be very or fairly easy to afford, was low, at 22% overall. Just 17% of households and 33% of non-households said the increases would be fairly or very easy to afford.

By contrast, it was a significant proportion (42%) that stated the bill increases would be fairly or very difficult to afford. 36% stated that it would be neither easy nor difficult.

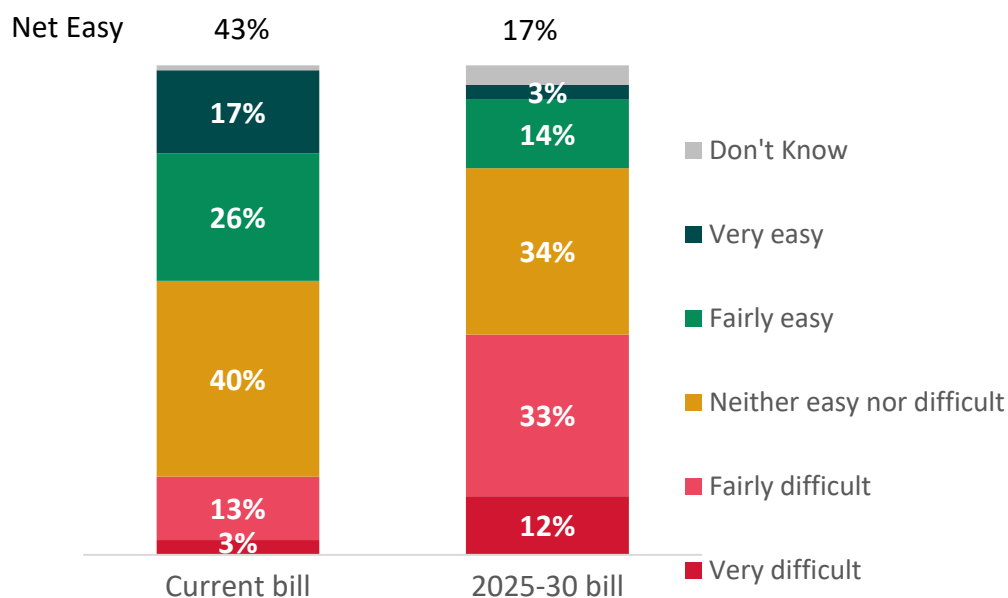
## 4.7 Household Affordability

Currently, 43% of households can afford their existing water and sewerage bills fairly or very easily.

Only 17% of household customers thought that the proposed bill would be fairly or very easy to afford.

- The affordability figure for households is different if we look at the method of invitation to the survey. 13% of those invited by email say that the proposed bill would be fairly or very easy to afford. This is significantly lower than the 18% of those that were invited to take part by post, that said it is fairly or very easy to afford.
- There is again a significant difference by type of invitation in the number of customers that say it will be very or fairly difficult to afford the proposed bill. 53% of those invited by email say it would be very/fairly difficult compared to a significantly lower 42% of those that have been invited via postal letters.

Figure 7. Q13 How easy or difficult is it for you to afford to pay your current water and sewerage bill?  
Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?



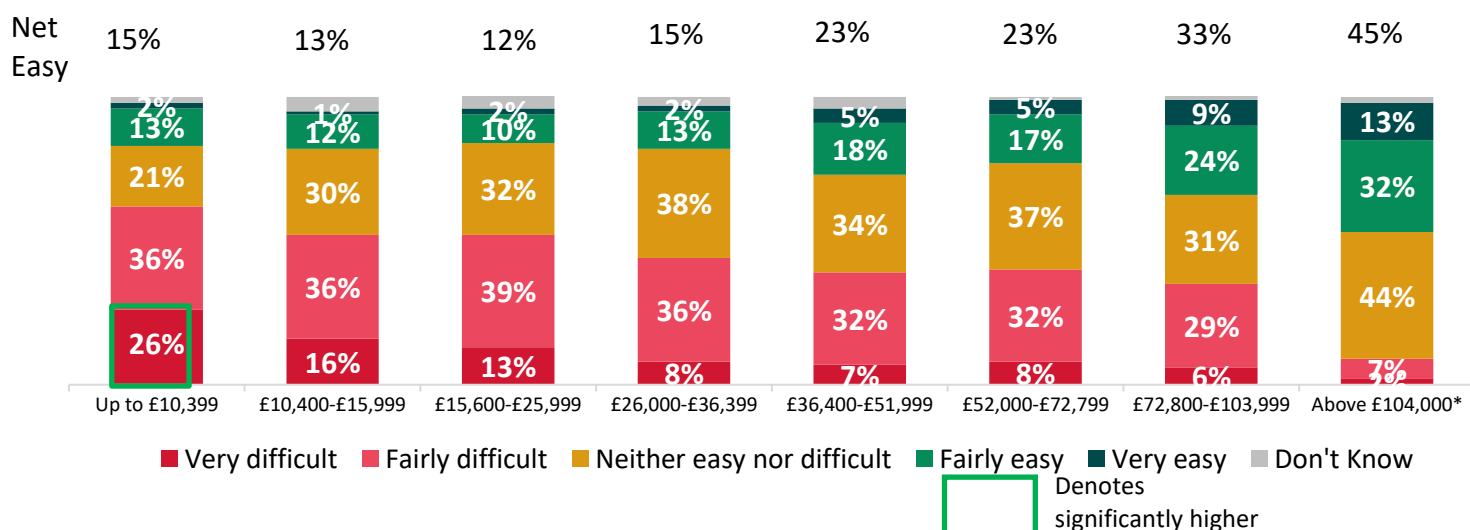
Base: All HH participants weighted base (1,682)

The affordability of the water and sewage bill is likely to become problematic for those that are already struggling financially (those finding it very or quite difficult to manage financially). 60% say they are finding it very or fairly difficult to pay their current water bill, however this number increases to 79% when asked about the 2025-30 bill.

As expected, affordability of the future bill will become more problematic for those on the lower end of the income scale, especially for those earning up to £10,399. These households are significantly more likely to find their future bills fairly/very difficult to afford compared to any household earning above £26,000.

The percentage of participants saying that they would find their bill Very difficult to afford decreased almost in a linear manner with the increase of income.

Figure 8. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?

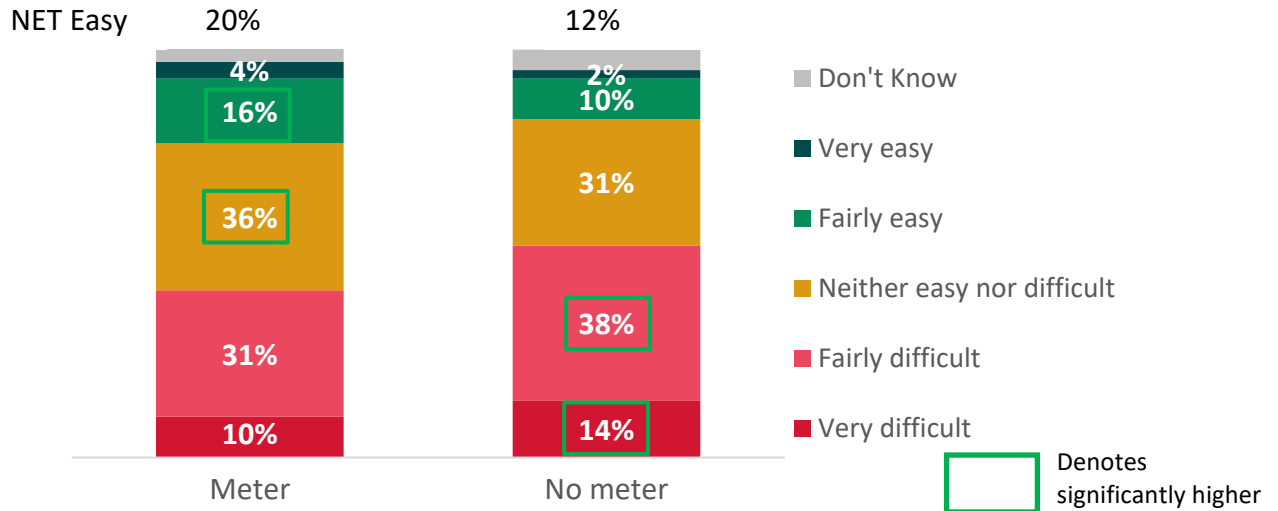


Base: All HH participants weighted base Up to £10,399 (144), £10,400-£15,999 (195), £15,400- 25,999 (302) £26,000-£36,600 (216), £36,400-£51,999 (191), 52,000 -£72,799 (137), £72,800-£103.999 (86), Above 104,000 (42) \*

\*Caution low base – results indicative only

Perceived affordability of the future bill is higher among those customers that have a water meter compared to those that don't, this is a significant difference. 20% of those with a water meter say they would find it easy to pay the bill in the future compared to 12% of those that currently don't have a meter.

**Figure 9. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**



Base: All HH participants weighted base with meters (1,023) and HH with No meter (580)

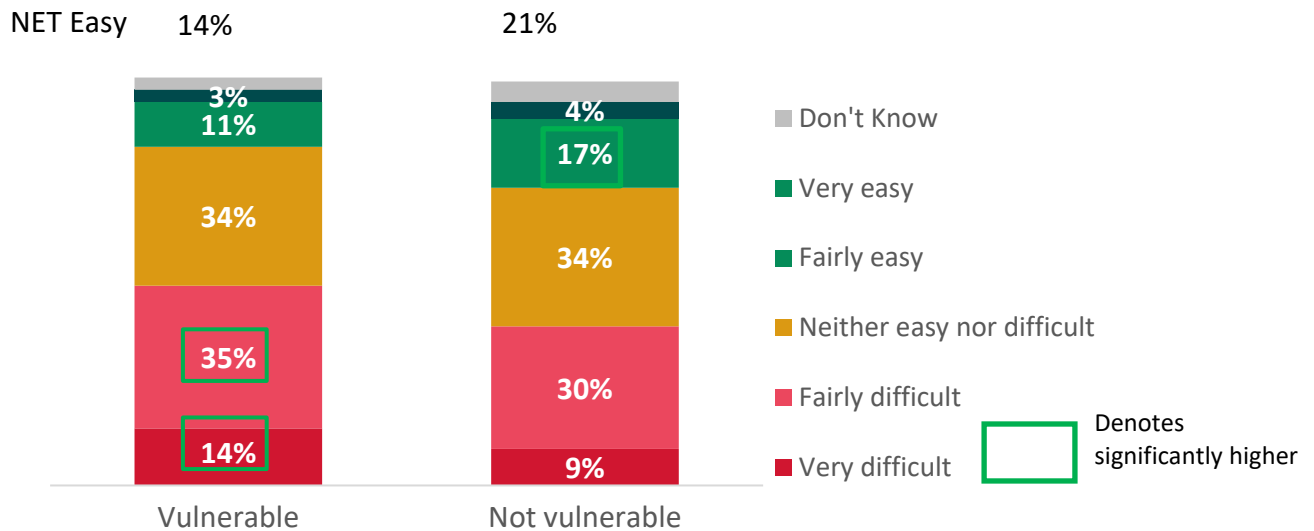
Affordability is significantly lower among households that have members with any vulnerability at 14% (Net Very/fairly easy) compared to households without vulnerable members at 21%.

These vulnerable households are significantly more likely to find their predicted bill Fairly/very difficult to pay (50%) compared to those without vulnerable members (40%).

When looking at vulnerability by type\* we see those that are considered vulnerable for medical reasons are significantly more likely to say they will find these bills fairly/very difficult to afford (57%) compared to those considered vulnerable because of communication (48%) or life stage (37%).



**Figure 10. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**

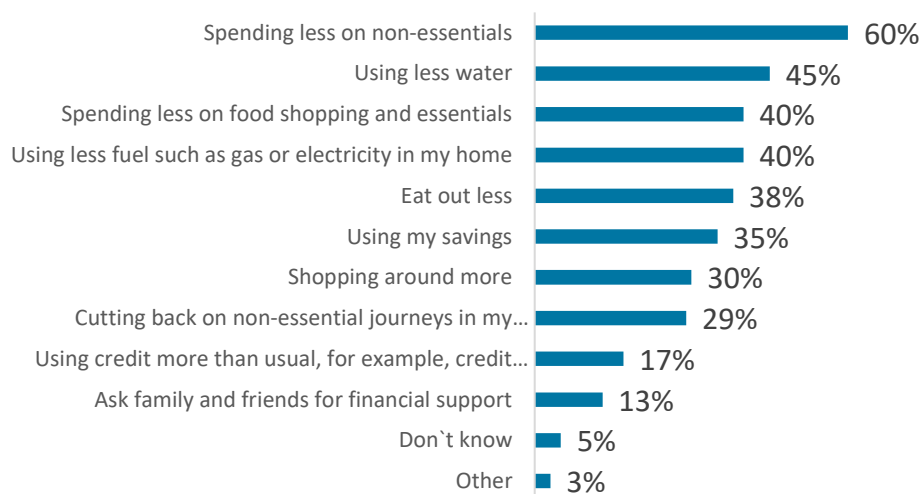


Base: All HH weighted base with vulnerable members (759) and HH with no vulnerable members (845)

\*Details of conditions listed under each vulnerability can be found in Appendix E

Those that would find it difficult to pay the bill in the future said most often that they would spend less on essentials (60%), use less water (45%), spend less on food shopping and essentials (40%) as well as use less fuel (40%) to meet the additional increase in the bills.

**Figure 11. Q15 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?**

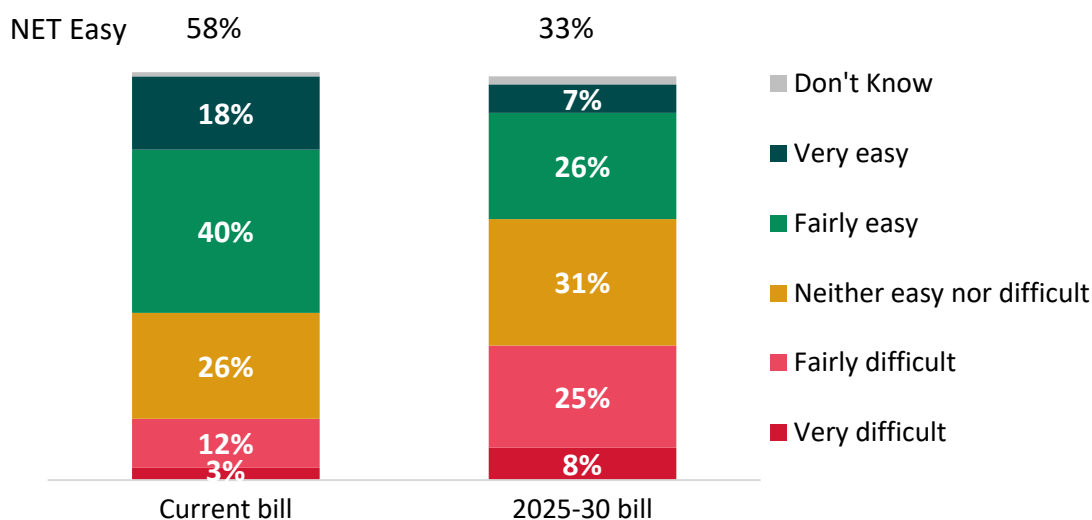


Base: All HH that would find it difficult to pay the future bill weighted base (1,352)

## 4.8 Non-household Affordability

Affordability is higher among the non-household population compared to the household population. Over half of businesses (58%) find their bills easy or very easy to afford. This however drops down to 33% when thinking about the future bill.

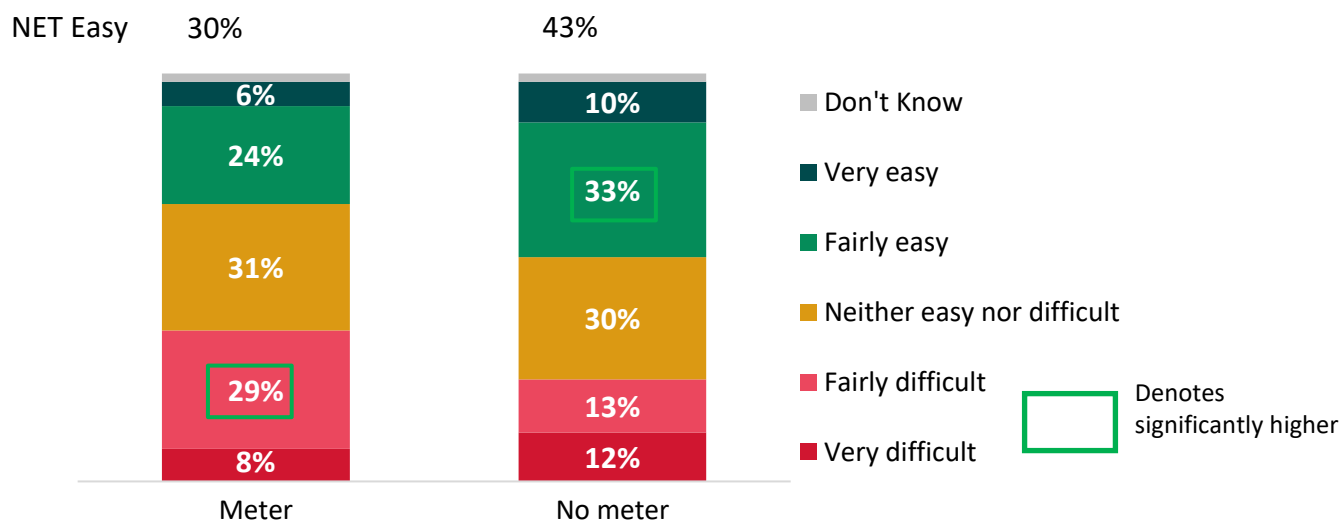
**Figure 12. Q13 How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills?**



Base: All NHH participants weighted base (696)

Unlike household participants, un-metered businesses seemed more resilient to bill increases (with 43% stating that the increases would be very or fairly easy to afford) than metered (30%); this difference is significant.

**Figure 13. Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills?**



Base: All NHH participants weighted base with (513) and without (160) water meters

## 4.9 Acceptability

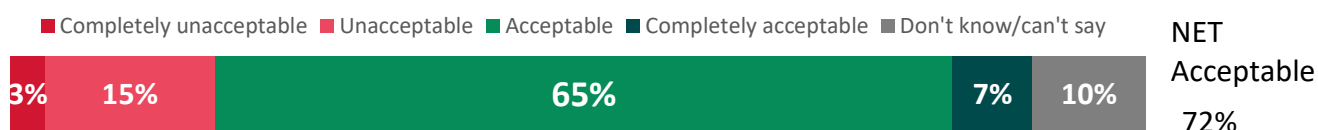
Acceptability of the proposed business plan was high at 78% overall. 72% of households and a significantly higher proportion of non-households, 91%, found the plan was acceptable or completely acceptable.

### 4.10 Household Acceptability

Close to three quarters (72%) of the Yorkshire Water customers we spoke to found the proposed plan acceptable.

A significantly higher percentage of females (75%) than males (69%) found the plan acceptable.

**Figure 14. Q32 Based on everything you have seen and read about Yorkshire Water' proposed business plan, how acceptable or unacceptable is it to you?**



Base: All HH participants weighted base (1,682)

#### Reasons for unacceptability

18% of participants found the proposed plan unacceptable. The top 3 reasons are all financially driven.

Perhaps unsurprisingly given the recent coverage in the media, 40% said company profits were too high, 39% said the companies themselves should pay for it and 36% said the bill increase is too expensive.

**Figure 15. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable?**

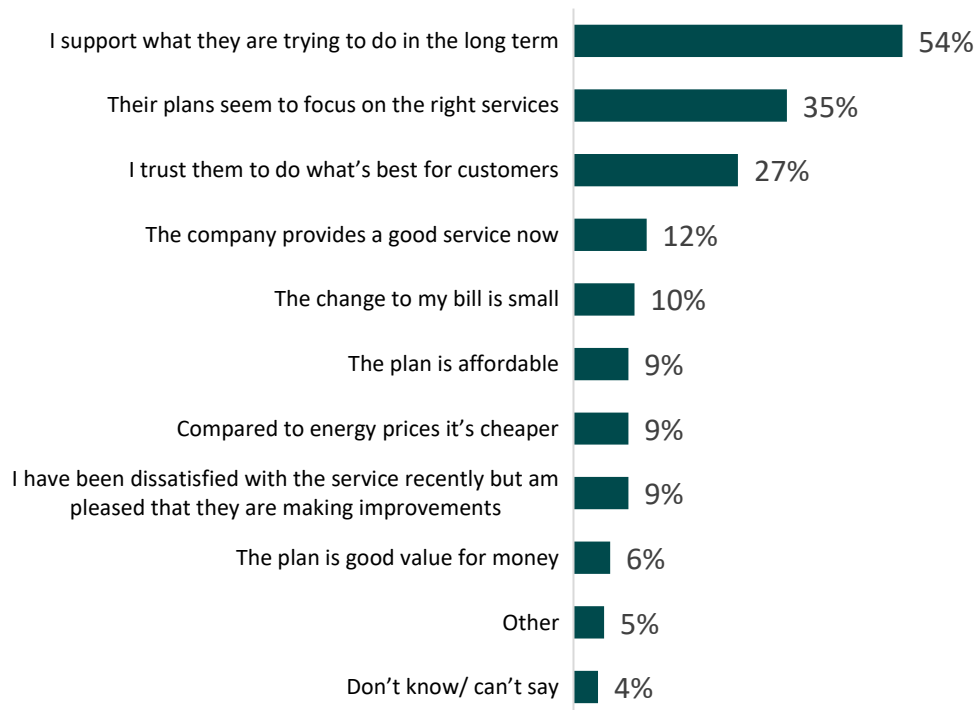


Base: All HH participants weighted base that felt proposals were unacceptable (306)

## Reasons for acceptability

Customers that found the plan acceptable, support what Yorkshire Water is trying to do long term (54%), feel like their plans are focusing on the right services (35%) and they are doing what is best for their customers (27%).

**Figure 16. Q34. What are the two main reasons that you feel the proposals for your water supply are acceptable?**



Base: All HH participants that felt proposals were acceptable (1,376)

## 4.11 Non-household Acceptability

Acceptability is slightly higher among non-household participants compared to household participants. 91% of the businesses we spoke to found the proposed business plan acceptable.

Acceptability was high (84%) even among businesses that are currently struggling to pay their bills.

**Figure 17. Q32 Based on everything you have seen and read about Yorkshire Water’s proposed business plan, how acceptable or unacceptable is it to you?**



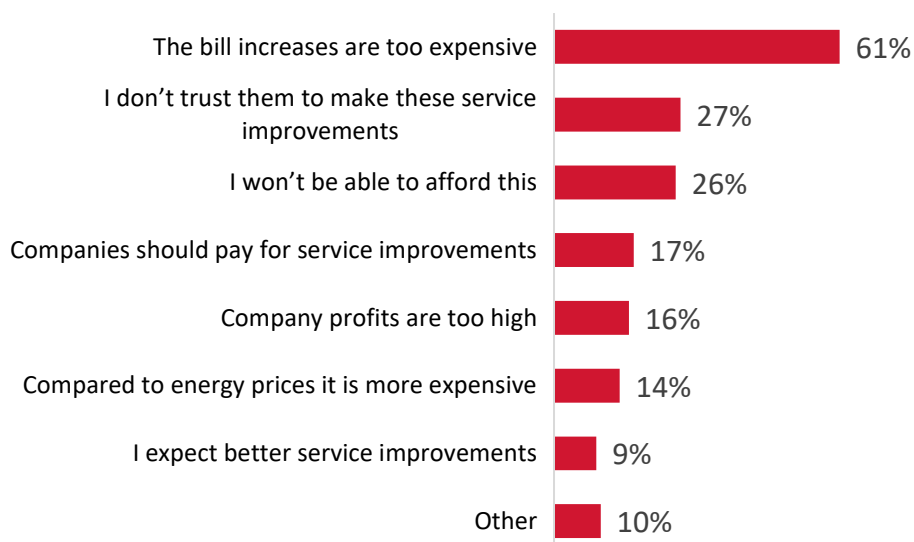
Base: All NHH participants weighted base (696)

### Reasons for unacceptability

Only 9% of non-household participants found the proposed plan unacceptable. Just like household participants their responses were financially driven.

61% found the bill increase too expensive, 27% didn't trust Yorkshire Water to make these improvements and 26% said they were not able to afford these.

**Figure 18. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable?**

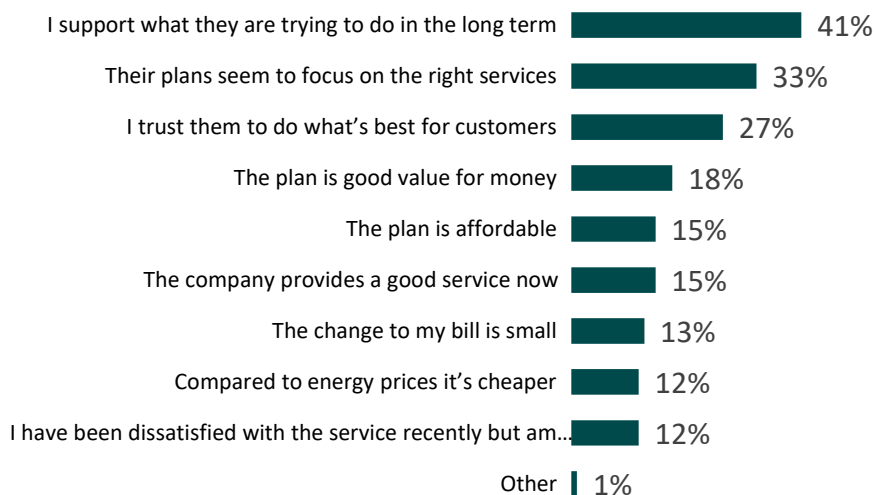


Base: All NHH participants weighted base that felt proposals were unacceptable (61)

## Reasons for acceptability

Similarly to household customers, businesses found the plan acceptable because they support what Yorkshire Water are trying to do (41%), feel the plan focuses on the right services (33%) and they trust Yorkshire Water to do what is best for their customers (27%).

**Figure 19. Q34. What are the two main reasons that you feel the proposals for your water supply are acceptable?**



Base: All NHH participants weighted base that felt proposals were acceptable (634)

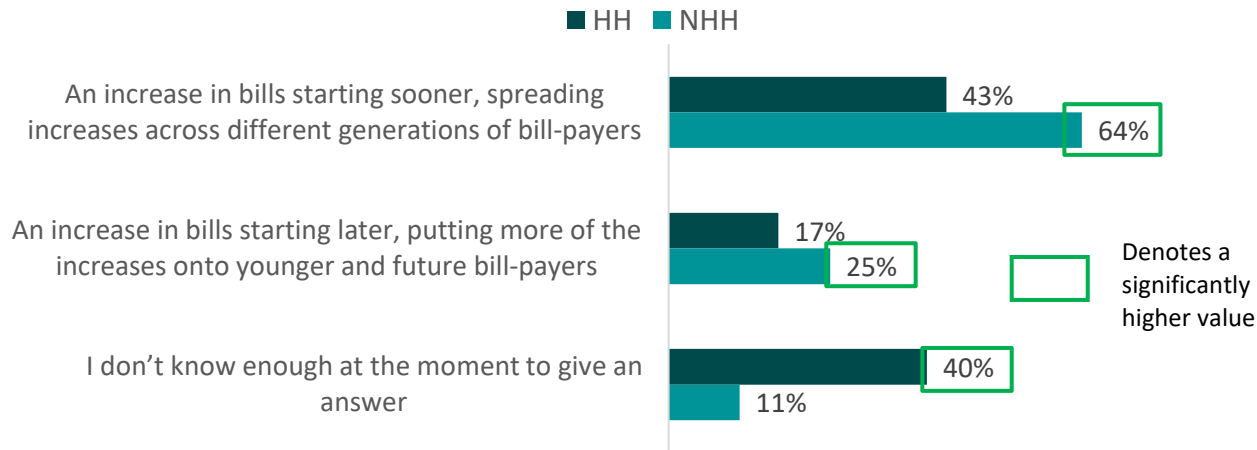
## 4.12 Intergenerational Phasing

Businesses seem less reluctant than household customers for the price increases to be put onto future customers.

2 in 5 households (40%) were unable or unwilling to answer the question compared to only a 11% of businesses, a significant difference.

Both business and household customers that were able to make a choice preferred the phasing option with an immediate increase in bills rather than a delay.

**Figure 20. Q35. Long term investment by Yorkshire Water will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?**



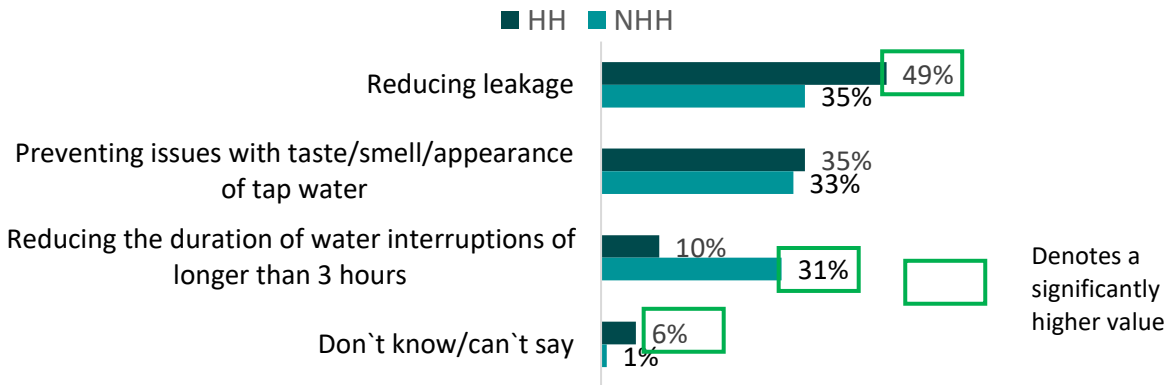
Base: All HH participants weighted base (1,682) and all NHH participants weighted base (696)

### 4.13 Performance commitments – water related

There has been a real engagement from both household and non-household customers with the performance commitments. The majority have been able to choose an option at these questions.

Only 6% of the household customers and 1% of the non-household customers weren't able to choose an option at this question.

**Figure 21. Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?**



All HH participants weighted base (1,682) and all NHH participants weighted base (696)

Preventing leaks was chosen as the most important performance commitment by household customers and non-household customers alike.

- This was significantly higher for those living and operating in North Yorkshire (52%) compared to those in the South (42%), but also higher compared to those living in the West (44%) and East (43%).

Preventing issues with the quality of water was rated second by both household and non-household customers.

- This was significantly higher among females (41%) compared to males (29%).
- This was significantly higher for those living and operating in East (38%) and South (37%) Yorkshire compared to those in the North (27%), but also higher compared to those in the West (35%).

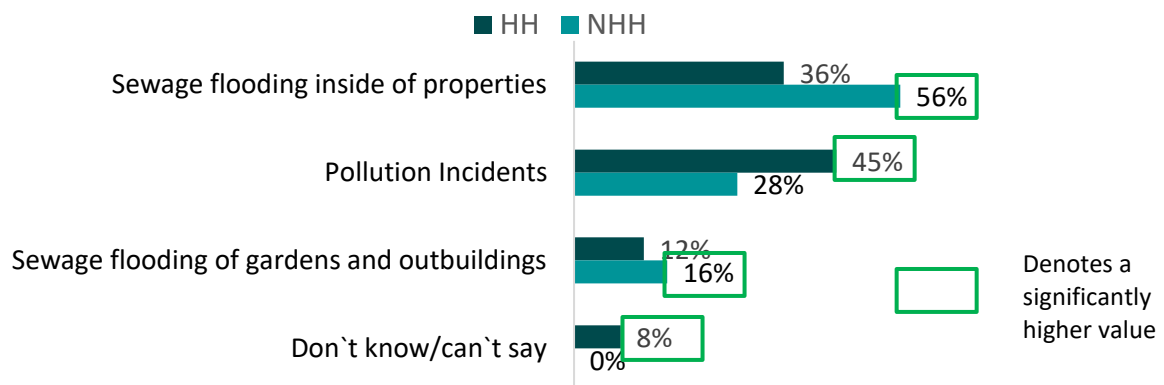
Reducing the duration of interruption was rated significantly more important for non-household customers (30%) compared to household customers (10%).

#### 4.14 Performance commitments – pollution and sewage related

All non-household participants were able to answer this question and only 8% of the household participants didn't or were not able to answer it.



Figure 22. Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you?



All HH participants weighted base (1,682) and all NHH participants weighted base (696)

Sewage flooding inside properties was the most important enhancement for both household and non-household participants, however it was significantly more important for non-household:

- Significantly more important to females (42%) than males (30%).
- This is also significantly higher for those living and operating in East Yorkshire (46%) compared to those in the North (34%), but also higher compared to those living in the West (41%) and South (42%).

Pollution incidents were rated second for both groups, however this was significantly higher for the household customers than business:

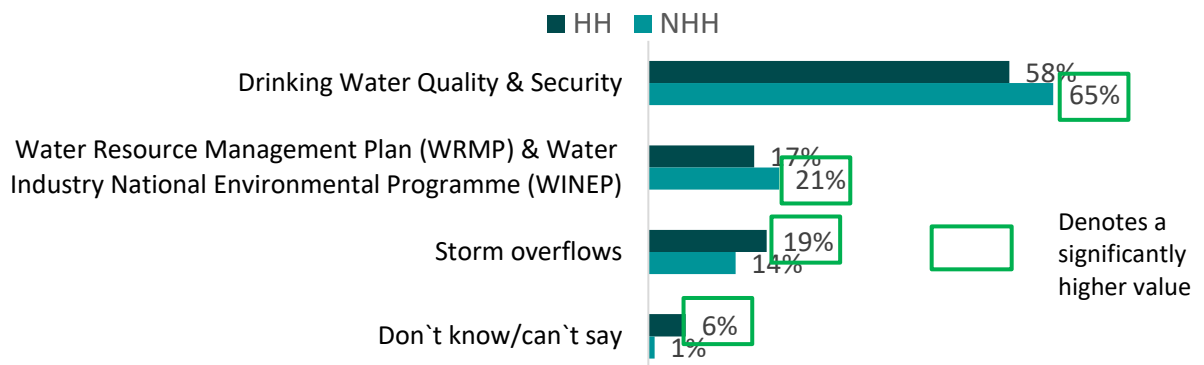
- Pollution incidents were rated significantly more important to males (52%) than females (38%) and for those in SEG AB (52%) and C1C2 (47%) than DE (32%).
- Pollution incident was rated significantly higher by those living and operating in North Yorkshire (50%) compared to those in the East (36%), West (40%) and South (38%) Yorkshire

Sewage flooding of gardens and outbuildings was the third most important commitment with a significantly higher number of business customers choosing this over household customers.

## 4.15 Enhancement cases – Bank 1

There has been a notable engagement from participants with the enhancement cases of the business plan as only 6% of household customer and 1% of non-household weren't able to make a decision for this question.

**Figure 23. Q27. Based on what you have just read, which of these four parts of the business plan is the most important to you?**



All HH participants weighted base (1,682) and all NHH participants weighted base (696)

With the effect of climate change becoming more apparent in the recent years perhaps it is unsurprising that Drinking Water Quality and Security came top for both groups, significantly higher for non-household.

- This was significantly more important to those in SEG DE (66%) compared to AB (53%) and C1C2 (58%).
- This was significantly higher for those living and operating in South Yorkshire (65%) compared to those in the North (53%) but was also higher compared to those in the East (56%) and West (61%).
- Water Resources Management Plan & Water Industry National Environment Plan came second and again was significantly more important for non-household.

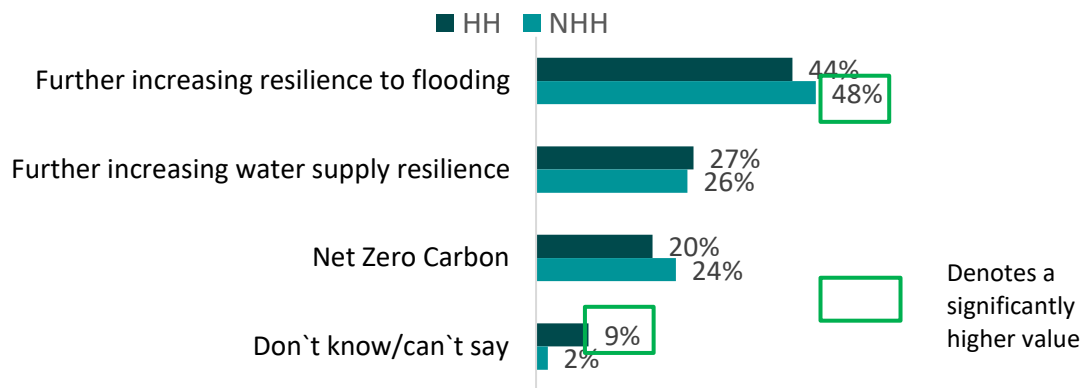
Storm overflows came third and they were significantly more important to household customers.

- Males (22%) rated these significantly higher than females (18%), as well as those in SEG AB (26%) when compared with C1C2 (18%) than DE (12%).
- Storm overflows were significantly higher for those living and operating in North Yorkshire (26%) compared to East (15%), South (16%) and West (17%) Yorkshire.

## 4.16 Enhancement cases – Bank 2

Engagement from participants continues to be high with this last set of enhancement cases. Only 9% of household customers and 3% of non-household customers weren't able to make a decision for this question.

**Figure 24. Q31. Based on what you have just read, which of these four parts of the business plan is the most important to you?**



All HH participants weighted base (1,682) and all NHH participants weighted base (696)

Further increasing resilience to flooding is the main priority for both groups of customers and it is significantly more important for non-household.

- Females (46%) have rated this significantly more important compared to males (41%).
- This was rated significantly higher by those living in East Yorkshire (57%) compared to West (41%), South (47%) and North (43%) Yorkshire.

Further increasing water supply resilience is ranked second most important for both groups, with little difference between them.

- This is however marked as significantly more important by 32% of males compared to 23% of females.

Net Zero was rated third by both groups with no significant differences by household and non-household customers.

- This enhancement was rated significantly lower by those living in East Yorkshire (9%) compared to those living in all the other regions (West 25%, South 22%, North 20%).

# APPENDIX A

Adherence to Ofwat's standards for high quality customer research

Requirement	How the study has adhered
■ Useful and contextualised	Research objectives aligned to PR24 and undertaken in accordance with Ofwat & CCW's published guidance.
■ Neutrally designed	Outside of the prescribed Ofwat guidance, every effort has been made to ensure that the research is neutral and free from bias. All elements of design were checked and challenged by Yorkshire Water's ICG. Where there is the potential for bias, this has been acknowledged in the report.
■ Fit for purpose	Research undertaken in accordance with Ofwat & CCW's published guidance. Cognitive testing was carried out to ensure the complex subject matter was presented in the questionnaire in a way which was as understandable and engaging as possible for respondents. Visual stimulus was created in order to aid participant understanding of the proposed plan.
■ Inclusive	Household and business customers were represented. Lower IMD deciles were over-sampled and higher IMD deciles under-sampled, to compensate for lower response rates. The response rates were monitored across a range of demographics to ensure representation, although the prescribed methodology prevents any interventions in this regard. Accommodation was made for any accessibility requests (including paper/postal versions, large print, high contrast print), via a freephone number.
■ Continual	This research builds on the foundation of the qualitative work and contributes towards the ongoing development of policy and plans.
■ Independently assured	All research was conducted by Accent, an independent market research agency. Yorkshire Water collaborated with their Independent Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings. Third line assured by Turner and Townsend.
■ Shared in full with others	The research will be published and shared on the Yorkshire Water website.
■ Ethical	Research conducted in accordance with the Market Research Society code of conduct and conforming to the requirements of ISO 20252:2019. Accent and Yorkshire Water were subject to strict data protection protocols.

# APPENDIX B

Additional Information

The following information on **Quantitative** work is available upon request:

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews, synchronous or asynchronous),
- The target group and sample selection methods,
- Assessment of sample representation of target population and respective implications,
- The sampling method, including size of planned and achieved sample, reasons for differences in planned and achieved and how any problems in this respect were dealt with,
- Response rate where probability samples were used and its definition and calculation method,
- Participation rate where non-probability samples were used,
- The number of interviewers or moderators, if applicable,
- The fieldworker/moderator validation methods, if applicable,
- The questionnaires, any visual exhibits or show cards, and other relevant data collection documents,
- The weighting procedures, if applicable,
- Any methods statistical analysis used,
- The estimating and imputation procedures, if applicable,
- The results that are based on subgroups and the number of cases used in subgroup analysis,
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used).

# APPENDIX C

## Limitations



Limitation	Impact
Recruiting NHH participants via CATI proved challenging	A low percentage of the NHH sample consists of CATI participants.
Small NHH participants are unlikely to be in scope (either by not having a dedicated business water supply, or by being in serviced offices with inclusive water)	The NHH sample is skewed towards larger organisations.
Some undesirably high weighting values were evident	The HH sample was (as a result of the prescribed methodology) heavily skewed towards older participants therefore analysis at an age subgroup level was included in the tables, but not in the report. Similarly, micro NHH were not represented particularly well in the sample (due to the prevalence of small businesses that do not have a dedicated NHH water supply, which made them ineligible for participation) and were weighted up more than might otherwise have been desirable. Impact to the overall affordability & acceptability figures was minimal.

# APPENDIX D

Fieldwork Materials

## Postal invitation

The Occupier  
Address



Accent

3 Orchard Place  
London  
SW1H 0BF

Unique ID number: XXXX  
PIN: nnnn

Dear Sir/Madam

### Water services research: complete a survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Yorkshire Water, the organisation which supplies water and sewerage for customers in Yorkshire and the Humber.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help Yorkshire Water plan investment for their service from 2025 to 2030 and will influence your future water services and bills.

Anyone who is eligible to take part and completes the full survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3607survey> and entering your Unique ID (XXXX) and PIN (nnnn).



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6591. You will be asked to leave your name and the 4 digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **3<sup>rd</sup> of September 2023**. Yorkshire Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at [yorkshirewatersurvey@accent-mr.com](mailto:yorkshirewatersurvey@accent-mr.com) or by freephone on 0800 099 6591.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB

## Email invitation



3 Orchard Place  
London  
SW1H 0BF

Dear #name#

### **Yorkshire Water services research: complete a 15-minute online survey and receive a £10 voucher**

This email has been sent to you by Accent (an independent market research company) on behalf of Yorkshire Water, the organisation which supplies water and sewerage for customers in Yorkshire and the Humber.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help water companies plan investment for their service from 2025-2030 and will influence your future water services and bills. The research is being conducted under the Market Research Society Code of Conduct, which means that any answers you give will be treated in confidence.

Anyone eligible, who completes the survey, will receive a £10 voucher (an Amazon voucher, an M&S voucher or a Love2Shop voucher). Alternatively, we can donate your incentive to WaterAid. Details on how claim your voucher are given at the end of the survey.

#### **Click here to check eligibility, and to take part.**

*(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)*

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [here](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **3<sup>rd</sup> of September 2023**. Yorkshire Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions about the research, please do reach out to us at [yorkshirewatersurvey@accent-mr.com](mailto:yorkshirewatersurvey@accent-mr.com) or by freephone on 0800 099 6591.

With best wishes,

Julian Hollo-Tas  
Project Manager.



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB

# APPENDIX E

Questionnaire (Online version)



## Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Yorkshire Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are. The closing date for completion of this survey is 3rd of September 2023.

**NOT PANEL:** Anyone completing the survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

**IF MOBILE DEVICE SHOW:** This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

### Scoping questions

- Q1. Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

---

Q2. **IF HH:** Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

---

Q3. **IF HH:** How old are you?

**OPEN TEXT RESPONSE BOX**

Prefer not to say **THANK AND CLOSE**

Under 18 **THANK AND CLOSE**

**PN: PLEASE RECODE IN THE FOLLOWING AGE BANDS**

18-24

25-34

35-44

45-54

55-64

65-74

75+

---

Q4. **IF HH:** Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q5. Are you currently charged for water through a water meter?

Yes

No

Don't know

---

Q6. **IF HH:** Yorkshire Water is your water and sewerage supplier. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

---

Q7. **IF NHH:** 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 **THANK AND CLOSE**

---

Q8. **IF NHH:** Is Yorkshire Water responsible for the water and sewerage services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Yorkshire Water area. Is that OK?

Yes

No **THANK AND CLOSE**

## Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

## Affordability

We are now going to ask you some questions about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

Q9. Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** Has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time

Most of the time

Sometimes

Rarely

Never

Prefer not to say

---

Q10. Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

**[IF HH]** Living/**[IF NHH]** Operating comfortably

Doing alright

Just about getting by

Finding it quite difficult

Finding it very difficult

Prefer not to say

---

Q11. Thinking about your **[IF HH]** household's/ **[IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

A lot worse

A bit worse

Stay the same

A bit better

A lot better

Prefer not to say



Don't know

---

Q12. **IF NHH:** How much are you currently paying for your water and sewerage services bill, each year?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Don't know

---

Q13. How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

Don't know

Q13A **IF NHH:** At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Yorkshire Water have.

Please could you go to [LINK](#)

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the Yorkshire Water area. An estimate is absolutely fine.

**Interviewer note,** do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

## Proposed changes to your water/sewerage bill for the years 2025-2030

The next set of questions are about proposed changes to your water & 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 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 (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.*

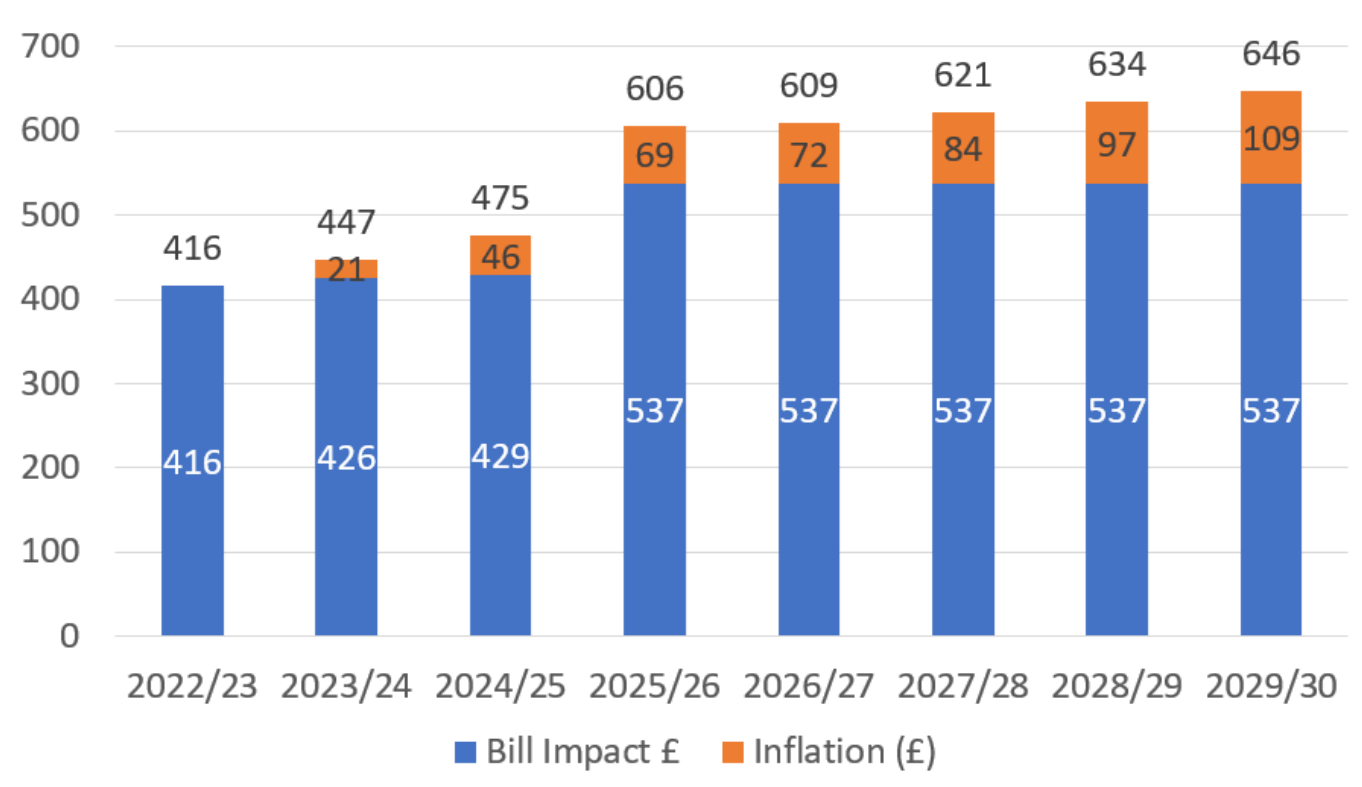
- *If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.*

- *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 (the water regulator) as part of their price review process every five years.*

*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.*

The following chart shows the expected increase in your water/sewerage bill over the next few years.



The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

**IF Social Tariff Customer (from sample):** This bill profile is based on the financial support scheme you are currently on. Yorkshire Water are still working on the Social Tariff bill, so this could potentially change.

**IF NHH DK @Q12:** Please note this bill profile is based on a stand in figure.

Q14. How easy or difficult do you think it would be for [IF HH] you [IF NHH] your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO Q15**
- Fairly difficult **HH ONLY GO TO Q15**
- Very difficult **HH ONLY GO TO Q15**
- Don't know

Q15. **[IF HH ONLY] IF Q14= 3,4,5** 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 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

## Acceptability

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.

Q16. The following chart shows how Yorkshire Water are performing in the area of Water supply interruptions longer than 3 hours, against both their target and also the other water companies.

## Water supply interruptions lasting longer than 3 hours

Duration without water for more than 3 hours by minutes per property.  
**Companies with the lowest numbers perform better**

<b>Yorkshire Water <u>has not</u> met its target for this metric last year</b>	
<b>Yorkshire Water are ranked 10<sup>th</sup> of 17 companies on this measure</b>	
Company	Performance
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
<b>Yorkshire</b>	<b>00:10:38</b>
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

**Better performance**  
  
  
**Poorer performance**

The following slide shows what Yorkshire Water is proposing doing to improve things:

## Water supply interruptions without warning, for longer than 3 hours

It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected

### We will achieve this target by investing in the following:

- Renewing our aging mains
- Increasing our alternative temporary water supply capacity
- Increasing no. of experienced staff members 24/7 to respond to incidents faster
- Ensure early identification of risk of failures through proactive activity

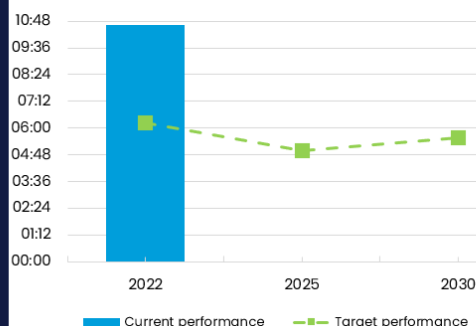


Yorkshire Water failed to hit the target, customers have been/will be compensated through the Ofwat penalty process

**Measure:** average no. of minutes that water supply is lost across all properties in Yorkshire

### Target for Supply Interruptions

Duration without water for more than 3 hours by minutes per property.  
(A lower bar / number is better.)



Q17. The following chart shows how Yorkshire Water are performing in the area of Water quality contacts, against both their target and also the other water companies.

## Appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 customers.  
**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 9<sup>th</sup> of 17 companies on this measure**

Company	Performance
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
<b>Yorkshire</b>	<b>1.09</b>
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

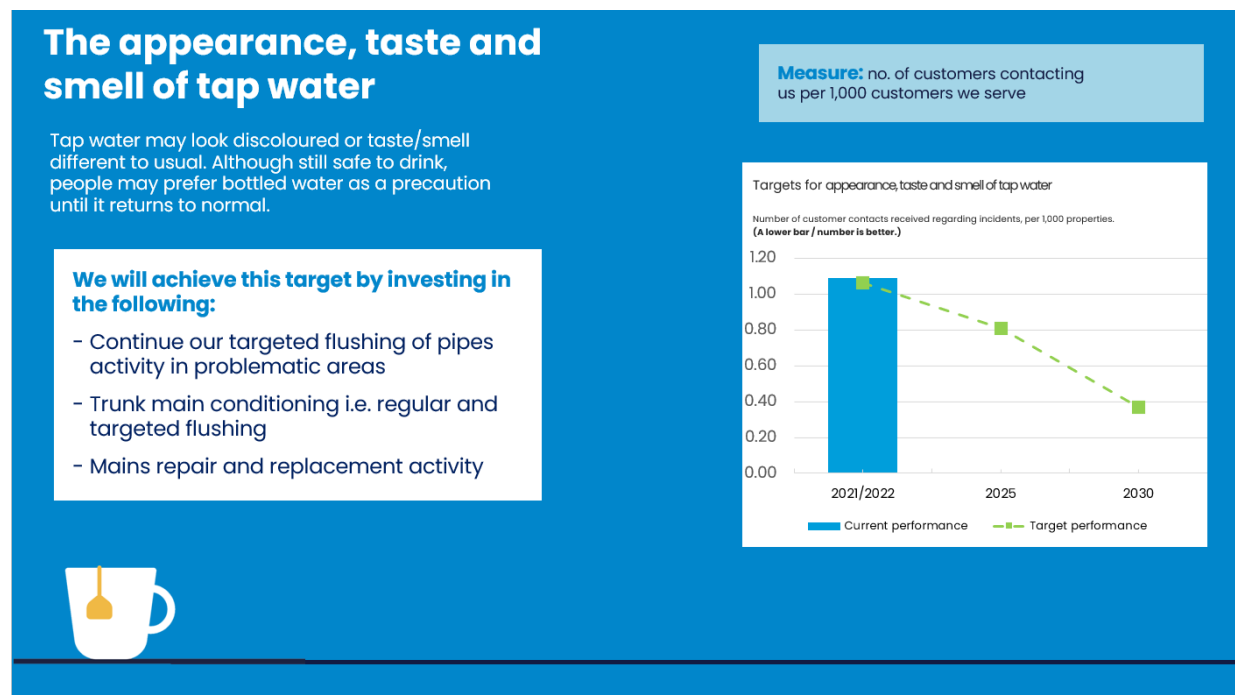
**Better performance**



**Poorer performance**



The following chart shows what Yorkshire Water is proposing doing to improve things:



Q18. The following chart shows how Yorkshire Water are performing in the area of reducing leaks, against both their target and also the other water companies.

## Reducing leaks

Number of litres lost per property per day  
**Companies with the lowest numbers perform better**

<b>Yorkshire Water has met its target for this metric last year</b>
<b>Yorkshire Water are ranked 15<sup>th</sup> of 19 companies on this measure</b>

Company	Performance
Bristol	65.04
Essex and Suffolk	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
Severn Trent	110.35
South Staffs	113.45
<b>Yorkshire</b>	<b>122.91</b>
United Utilities	124.21
Hafren Dyfrdwy	146.09
Thames	151.51
Welsh Water	158.8



The following chart shows what Yorkshire Water is proposing doing to improve things:

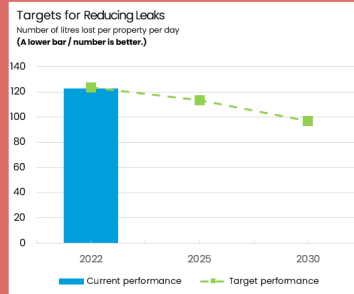
## Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

### We will achieve this target by:

- Investing in early identification of risk of failures through proactive activity
- Managing water smarter e.g., pressure management
- Smart metering - highlight customer side leaks and wider area problems
- Mains renewal programme
- Fitting more sound loggers in pipes to identify leaks we struggle to find traditionally

**Measure:** no. of litres of water lost per property per day



Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Preventing issues with taste/smell/appearance of tap water
- Reducing leakage
- Don't know/can't say

Q20. The following chart shows how Yorkshire Water are performing in the area of sewage flooding inside of properties, against both their target and also the other water companies.

## Sewage flooding inside properties

Number of properties affected, per 10,000.  
**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 8<sup>th</sup> of 11 companies on this measure**

Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
<b>Yorkshire</b>	<b>2.83</b>
United Utilities	2.97
Southern	3.04
Thames	3.46



The following chart shows what Yorkshire Water is proposing doing to improve things:

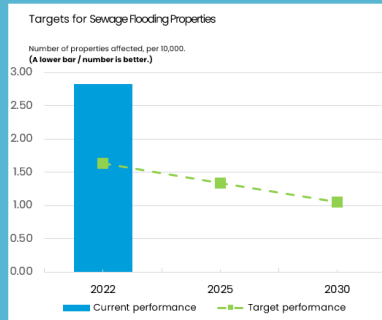
## Sewage flooding inside properties

An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

### We will achieve this target by:

- Installation of 165,000 customer sewer alarms to provide early warning of failures
- Proactive cleansing of the sewer network and installation of monitors to ensure this is happening in the right areas
- Extra checks in areas prone to flooding
- Educate customers on correct sewer use

Measure: no. of incidents per 10,000 properties



Q21. The following chart shows how Yorkshire Water are performing in the area of sewage flooding of gardens and outbuildings, against both their target and also the other water companies.

## Sewage flooding outside of properties

Number of properties affected, per 10,000.

**Companies with the lowest numbers perform better**

**Yorkshire Water has met its target for this metric last year**

**Yorkshire Water are ranked 8<sup>th</sup> of 11 companies on this measure**

Company	Performance
Thames	9.4
Severn Trent	10.8
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
<b>Yorkshire</b>	<b><u>19.52</u></b>
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

**Better performance**



**Poorer performance**



The following slide shows what Yorkshire Water is proposing doing to improve things:

## Sewage flooding outside properties

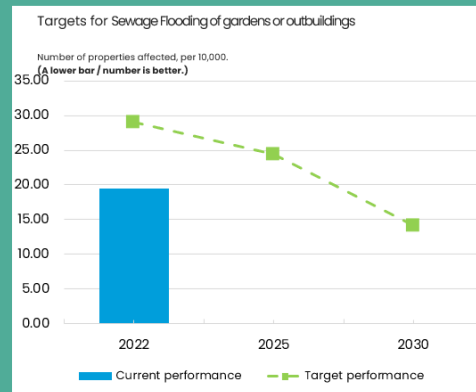
An escape of sewage into gardens or outbuildings is inconvenient and unpleasant and can restrict access to properties.

### We will achieve this target by:

- Installation of 68,000 network sensors to proactively find blockages and silt in pipes
- Investing in customer sewer alarms to provide early warning of failures
- Increase proactive/reactive flooding response team
- Improving surface water management to avoid sewers being overwhelmed in really wet weather



**Measure:** no. of incidents per 10,000 properties



Q22. The following chart shows how Yorkshire Water are performing in the area of pollution incidents, against both their target and also the other water companies.

## Pollution of rivers and bathing waters

Number of incidents per 10,000 km of sewer.

**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 7<sup>th</sup> of 11 companies on this measure**

Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
<b>Yorkshire</b>	<b>27.36</b>
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

**Better performance**



**Poorer performance**



The following chart shows what Yorkshire Water is proposing doing to improve things:



## Pollution of rivers and bathing waters

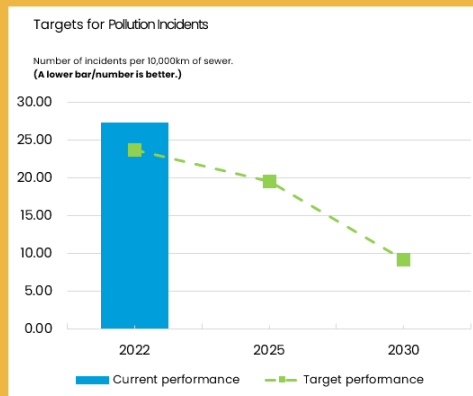
Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.

### We will achieve this target by:

- Investing in predictive intelligent systems to help with early identification problems before they occur
- Investing in being more resilient to power outages, to keep wastewater flowing during power outages
- More proactive sewer cleansing activity on highest risk sewage mains



**Measure:** no. of incidents per 10,000 km of sewer



Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

- Sewage flooding **inside** of properties
- Sewage Flooding **outside** of properties
- Pollution Incidents
- Don't know/can't say

Q24. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 1



## Enhanced investment:

### Water Resource Management Plan (WRMP)

&

### Water Industry National Environmental Programme (WINEP)

Water companies have a programme of work to meet environmental laws. These laws include:

- Managing our water resources to ensure we can meet the needs of our customers whilst protecting the environment through not taking too much water from rivers and the ground.
- Treating wastewater to a standard that does not harm the natural environment is the largest part of the programme and includes removing phosphorous before treated wastewater is returned to the environment.
  - Phosphorous (P) is a normal part of wastewater and is harmless in small amounts however, it can be damaging when unmanaged. Normal sewage treatment doesn't remove P, so this investment allows us to upgrade our works to remove P, releasing less into rivers and the sea.

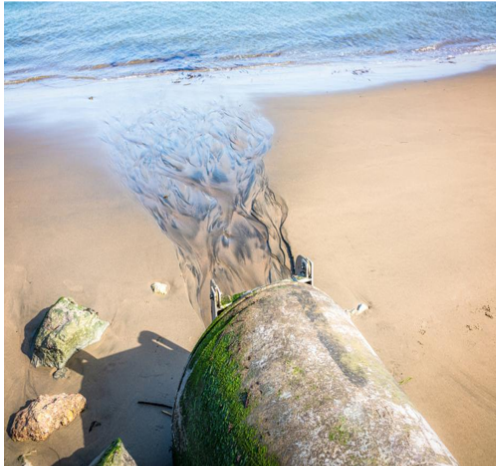
Yorkshire Water has a target in its business plan to deliver the expected statutory WINEP and WRMP programme of work for 2025-2030, and this will add **£32.40 per year** to the average household water bill.

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Q25. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 2

### Enhanced investment: Storm overflows



When there is too much rainfall for sewers to handle, storm overflows allow rainwater, mixed with sewage, to escape into a separate tank, once filled these tanks eventually flow into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.

Each company in England has a target set by Government to reduce the use of storm overflows.

To work towards these longer-term targets, Yorkshire Water has a target in its 2025–2030 business plan to reduce spills from:

- 211 of the most problematic overflows, and
- 29 of its coastal overflows

This will increase the average household bill by **£12.70 per year**.

---

Q26. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 3

### Enhanced investment: Drinking Water Quality & Security

Our job is to continually provide clean safe drinking water.

We have a target in our business plan to deliver the below drinking water quality and security targets:

- Invest in water treatment works at risk of new types of failures e.g. rapidly changing weather patterns
- Continue to invest in the removal of lead from our pipes
- Ensuring our key treatment works are protected from terrorist or cyber attacks.

This activity will increase the average household bill by **£1.30 per year**.



---

Q27. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Water Resource Management Plan (WRMP) & Water Industry National Environmental Programme (WINEP)  
Storm overflows  
Drinking Water Quality & Security  
Don't know/can't say

---

Q28. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 4:



### **Enhanced investment:** Further increasing water supply resilience

Yorkshire Water has a number of zones where customers are at increased risk of experiencing a water supply interruption due to only having a single water treatment works delivering their water.

This investment would enable Yorkshire Water to secure alternative supplies of water for 135,000 customers, reducing their risk of interruptions.

Yorkshire Water has a target in its business plan to deliver this improvement for 2025-2030 – this will add **£1.50 per year** to the average household water bill.

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Q29. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 5

### Enhanced investment: Net Zero Carbon



The water sector agreed a goal to reach Net Zero Carbon by 2030. Playing our part to reduce global carbon emissions and limit the impact of climate change.

Yorkshire Water's business plan includes enhanced investment to:

- Install more solar renewables, and move our self-generation from 18% to 30%
- Make process upgrades in wastewater treatment which will allow us to generate more energy from waste and reduce our wastewater treatment emissions by 30%

This activity will add **£0.60p per year** to the average household water bill.

---

Q30. The following slide describes one of the additional components of Yorkshire Water's business plan; Enhancement 6

### Enhanced investment: Further increasing resilience to flooding

The aim of this work is to create a new approach to surface water management for the whole of Yorkshire which relies upon more natural/environmentally friendly infrastructure to improve flood resilience as opposed to carbon intensive traditional approaches i.e. concrete tanks in the ground.

This innovative work will start in the most impacted part of our region Hull and East Riding, and learnings will rollout across Yorkshire afterward.

Yorkshire Water has a target in its business plan to deliver this programme of work for 2025-2030 – this will add **£0.30p per year** to the average household water bill.



---

Q31. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Further increasing water supply resilience  
Net Zero Carbon  
Further increasing resilience to flooding  
Don't know/can't say

---

Q32. Based on everything you have seen and read about Yorkshire Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Completely acceptable **GO TO Q34**  
Acceptable **GO TO Q34**  
Unacceptable **GO TO Q33**  
Completely unacceptable **GO TO Q33**  
Don't know/can't say

---

Q33. **IF Q32=3 or 4** What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The bill increases are too expensive  
Company profits are too high  
Companies should pay for service improvements  
I expect better service improvements  
The plan is poor value for money  
Compared to energy prices it is more expensive  
I am dissatisfied with current services  
The plans don't focus on the right services  
I won't be able to afford this  
I don't trust them to make these service improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

Q34. **IF 32=1 OR 2** What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The plan is good value for money  
The plan is affordable  
Compared to energy prices it's cheaper  
Their plans seem to focus on the right services  
The company provides a good service now  
I support what they are trying to do in the long term  
The change to my bill is small  
I trust them to do what's best for customers  
I have been dissatisfied with the service recently but am pleased that they are making improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Don't know/ can't say

- 
- Q35. Long term investment by Yorkshire 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? **SINGLECODE**

*Please select one answer only*

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

- 
- Q36. **ALL SKIP**

## HH ONLY: Household Demographic

- Q37. Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female  
Male  
I identify in another way  
Prefer not to say

- 
- Q38. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**High 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  
Retired **GO TO Q39**  
Student  
Prefer not to say

- 
- Q39. **IF Q38=RETIRED ASK** Does the main income earner have a state pension, a private pension or both?

State only  
Private only  
Both  
Prefer not to say

- 
- Q40. **IF Q39= PRIVATE OR BOTH ASK:** How would you describe the main income earner's occupation type before retirement?

**High 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  
None of these  
Prefer not to say

---

Q41. 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. **MULTICODE**

*Please select all that apply*

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

---

Q42. What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

*Please select one answer only*

**WHITE**

English, Welsh, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

**MIXED**

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

**ASIAN OR ASIAN BRITISH**

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

**BLACK OR BLACK BRITISH**

Caribbean

African

Any other Black background

**OTHER ETHNIC GROUP**

Arab

Any other ethnic group

Prefer not to say



---

Q43. Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year

From £1,000 to £1,399 a week/From £52,000 to £72,799 a year

From £1,400 to £1,999 a week/From £72,800 to £103,999 a year

£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

**GO TO Q32**

## NHH only: Demographic Questions

Q44. How does your organisation mainly use water at its premises? **MULTICODE**

*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

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Q45. How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250

Prefer not to say

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Q46. How many employees does your organisation have in the UK?

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

---

Q47. Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

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

## Classification Questions

Q48. **IF NON PANEL:** We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS  
M&S Voucher by email COLLECT EMAIL ADDRESS  
One4All by email COLLECT EMAIL ADDRESS  
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

---

Q49. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes  
No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

---

Q50. **CATI ONLY** Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes  
No

**QEND [IF HH]** Yorkshire Water offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

<https://www.yorkshirewater.com/bill-account/help-paying-your-bill/>

# APPENDIX F

Questionnaire (Paper version)

# Paper survey cover letter

The Occupier  
Address



3 Orchard Place  
London  
SW1H 0BF

Unique ID number: XXXX  
PIN: nnnn

Dear Customer,

## Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for United Utilities. Please find it attached. This pack should contain

- (1) This letter
- (2) A paper version of the survey
- (3) A reply envelope (pre-paid: no stamp required)

Anyone who is eligible to take part and completes the full 15 minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid.

## How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3607survey> and entering your Unique ID (XXXX) and PIN (nnnn).



Please note: the final date for us to receive completed surveys (including paper submissions) is Wednesday 6<sup>th</sup> September 2023.

If you have any questions, please don't hesitate to contact the research team at [yorkshirewatersurvey@accent-mr.com](mailto:yorkshirewatersurvey@accent-mr.com) or by freephone on 0800 099 6591.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB



## Affordability and Acceptability Testing

Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help Yorkshire Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

**Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **8<sup>th</sup> of September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials, you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

When completing the survey please start from Question 1 (Q1) in the 'Scoping questions' section.

If at any point in the 'Scoping questions' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the 'Scoping questions' section without that message appearing next to any of your answers please go to the "Main questionnaire" and follow the questionnaire order.

### Scoping questions

- Q1. Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

☐ Yes

☐ No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q2. Do you or any of your close family work in market research or for a water company?

☐ Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

☐ No

---

Q3. How old are you?

**Please enter your age on the line below**

☐ Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

☐ Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q4. 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 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

☐ Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q5. Are you currently charged for water through a water meter?

☐ Yes

☐ No

☐ Don't know

---

Q6. Yorkshire Water is your water and sewerage supplier. Does this sound right?

☐ Yes

☐ No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

☐ Don't know

---

**Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.**

## Main Questionnaire

### Affordability

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

Q7. Thinking about your finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills?

***Please select one answer only***

☐ All of the time

☐ Most of the time

- ☐ Sometimes
- ☐ Rarely
- ☐ Never
- ☐ Prefer not to say

---

Q8. Overall, how well would you say you are managing financially now?

***Please select one answer only***

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

---

Q9. Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

***Please select one answer only***

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

---

Q10. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

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

## Proposed changes to your water/sewerage bill for the years 2025-2030

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart provided 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.

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 (ie. 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 (the water regulator) as part of their price review process every five years.

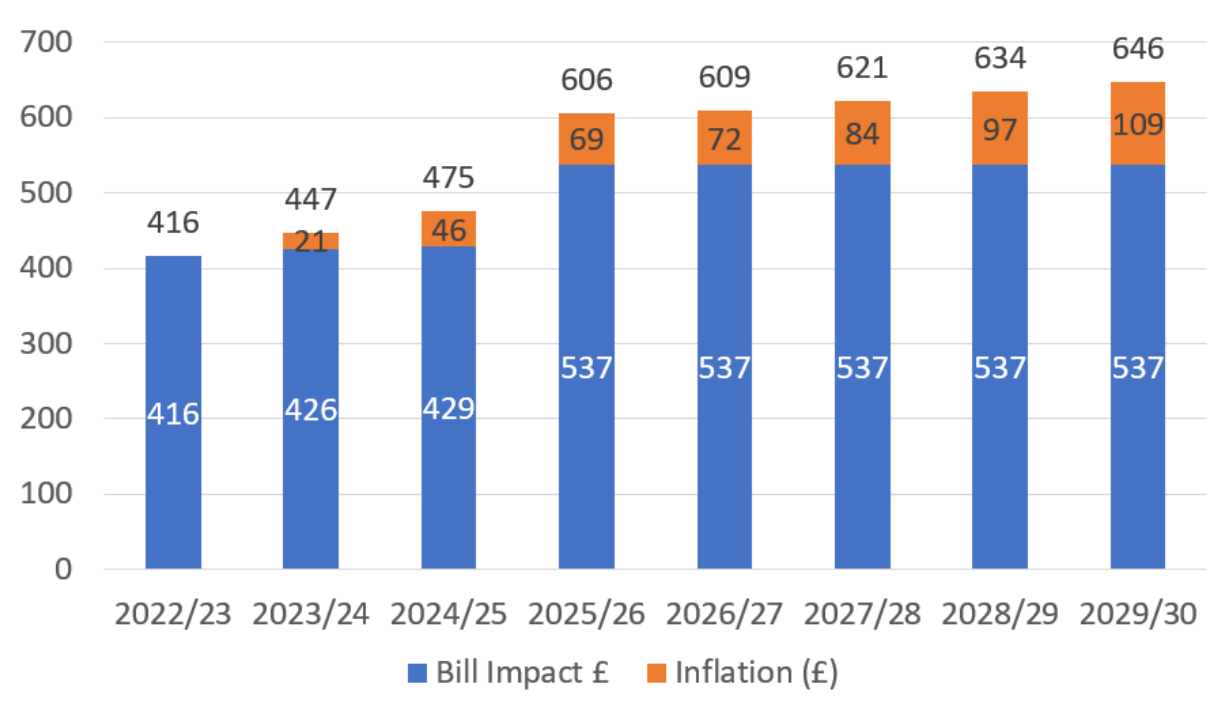
The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.



Once you have read the above, and referred to the chart on, please continue.

Q11. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

***Please select one answer only***



- ☐ Very easy **Please skip question 12**
- ☐ Fairly easy **Please skip question 12**
- ☐ Neither easy nor difficult **Please go to Question 12**
- ☐ Fairly difficult **Please go to Question 12**
- ☐ Very difficult **Please go to Question 12**
- ☐ Don't know

---

**Q12. Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)**

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

***Please select all that apply***

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

## Acceptability

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.

Q13. The following chart shows how Yorkshire Water are performing in the area of Water supply interruptions longer than 3 hours, against both their target and also the other water companies.

## Water supply interruptions lasting longer than 3 hours

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

**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 10<sup>th</sup> of 17 companies on this measure**

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

**Better  
performance**



**Poorer  
performance**

The following chart shows what Yorkshire Water is proposing doing to improve things:

## Water supply interruptions without warning, for longer than 3 hours

It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected

**We will achieve this target by investing in the following:**

- Renewing our aging mains
- Increasing our alternative temporary water supply capacity
- Increasing no. of experienced staff members 24/7 to respond to incidents faster
- Ensure early identification of risk of failures through proactive activity

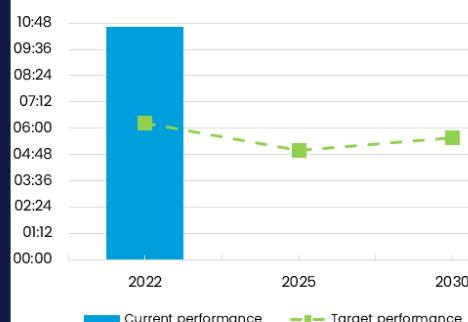


Yorkshire Water failed to hit the target, customers have been/will be compensated through the Ofwat penalty process

**Measure:** average no. of minutes that water supply is lost across all properties in Yorkshire

### Target for Supply Interruptions

Duration without water for more than 3 hours by minutes per property.  
(A lower bar / number is better.)



Q14. The following chart shows how Yorkshire Water are performing in the area of Water quality contacts, against both their target and also the other water companies.

## Appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 customers.  
**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 9<sup>th</sup> of 17 companies on this measure**

Company	Performance
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
<b>Yorkshire</b>	<b>1.09</b>
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

**Better performance** ↑  
↓ **Poorer performance**

The following chart shows what Yorkshire Water is proposing doing to improve things:

## The appearance, taste and smell of tap water

Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

**We will achieve this target by investing in the following:**

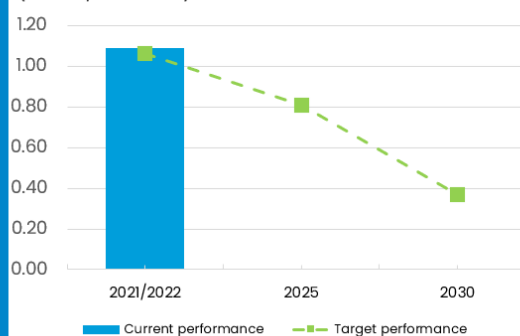
- Continue our targeted flushing of pipes activity in problematic areas
- Trunk main conditioning i.e. regular and targeted flushing
- Mains repair and replacement activity



**Measure:** no. of customers contacting us per 1,000 customers we serve

Targets for appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 properties.  
(A lower bar / number is better.)



Q15. The following chart shows how Yorkshire Water are performing in the area of reducing leaks, against both their target and also the other water companies.

## Reducing leaks

Number of litres lost per property per day  
**Companies with the lowest numbers perform better**

<b>Yorkshire Water has met its target for this metric last year</b>
<b>Yorkshire Water are ranked 15<sup>th</sup> of 19 companies on this measure</b>

Company	Performance
Bristol	65.04
Essex and Suffolk	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
Severn Trent	110.35
South Staffs	113.45
<b>Yorkshire</b>	<b>122.91</b>
United Utilities	124.21
Hafren Dyfrdwy	146.09
Thames	151.51
Welsh Water	158.8



The following chart shows what Yorkshire Water is proposing doing to improve things:

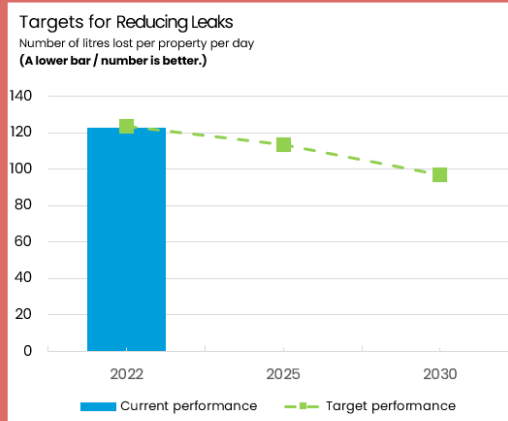
## Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

### We will achieve this target by:

- Investing in early identification of risk of failures through proactive activity
- Managing water smarter e.g., pressure management
- Smart metering - highlight customer side leaks and wider area problems
- Mains renewal programme
- Fitting more sound loggers in pipes to identify leaks we struggle to find traditionally

**Measure:** no. of litres of water lost per property per day



---

Q16. Based on what you have just read, which of these three parts of the business plan is the most important to you?

***Please select one answer only***

- ☐ Reducing the duration of water interruptions of longer than 3 hours
- ☐ Reducing leakage
- ☐ Preventing issues with taste/smell/appearance of tap water
- ☐ Don't know/can't say

---

Q17. The following chart shows how Yorkshire Water are performing in the area of sewage flooding inside of properties, against both their target and also the other water companies.

## Sewage flooding inside properties

Number of properties affected, per 10,000.

**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 8<sup>th</sup> of 11 companies on this measure**

Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
<b>Yorkshire</b>	<b><u>2.83</u></b>
United Utilities	2.97
Southern	3.04
Thames	3.46

**Better  
performance**



**Poorer  
performance**



The following chart shows what Yorkshire Water is proposing doing to improve things:

## Sewage flooding inside properties

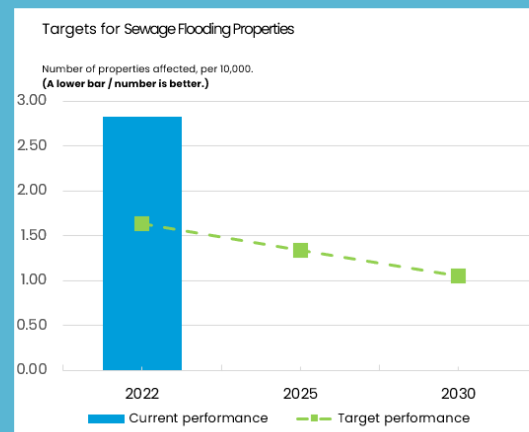
An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

### We will achieve this target by:

- Installation of 165,000 customer sewer alarms to provide early warning of failures
- Proactive cleansing of the sewer network and installation of monitors to ensure this is happening in the right areas
- Extra checks in areas prone to flooding
- Educate customers on correct sewer use



**Measure:** no. of incidents per 10,000 properties



Q18. The following chart shows how Yorkshire Water are performing in the area of sewage flooding of gardens and outbuildings, against both their target and also the other water companies.

## Sewage flooding outside of properties

Number of properties affected, per 10,000.

**Companies with the lowest numbers perform better**

**Yorkshire Water has met its target for this metric last year**

**Yorkshire Water are ranked 8<sup>th</sup> of 11 companies on this measure**

Company	Performance
Thames	9.4
Severn Trent	10.8
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
<b>Yorkshire</b>	<b>19.52</b>
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

**Better performance**



**Poorer performance**



The following chart shows what Yorkshire Water is proposing doing to improve things:

## Sewage flooding outside properties

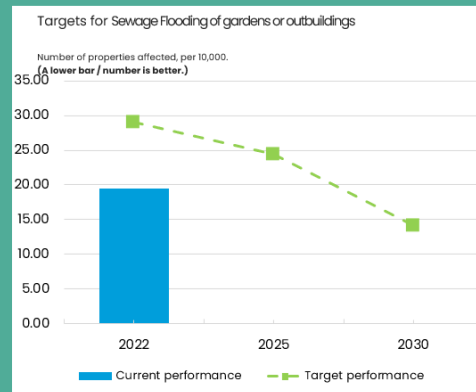
An escape of sewage into gardens or outbuildings is inconvenient and unpleasant and can restrict access to properties.

### We will achieve this target by:

- Installation of 68,000 network sensors to proactively find blockages and silt in pipes
- Investing in customer sewer alarms to provide early warning of failures
- Increase proactive/reactive flooding response team
- Improving surface water management to avoid sewers being overwhelmed in really wet weather



**Measure:** no. of incidents per 10,000 properties



Q19. The following chart shows how Yorkshire Water are performing in the area of pollution incidents,

## Pollution of rivers and bathing waters

Number of incidents per 10,000 km of sewer.

**Companies with the lowest numbers perform better**

**Yorkshire Water has not met its target for this metric last year**

**Yorkshire Water are ranked 7<sup>th</sup> of 11 companies on this measure**

Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
<b>Yorkshire</b>	<b>27.36</b>
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

**Better performance**

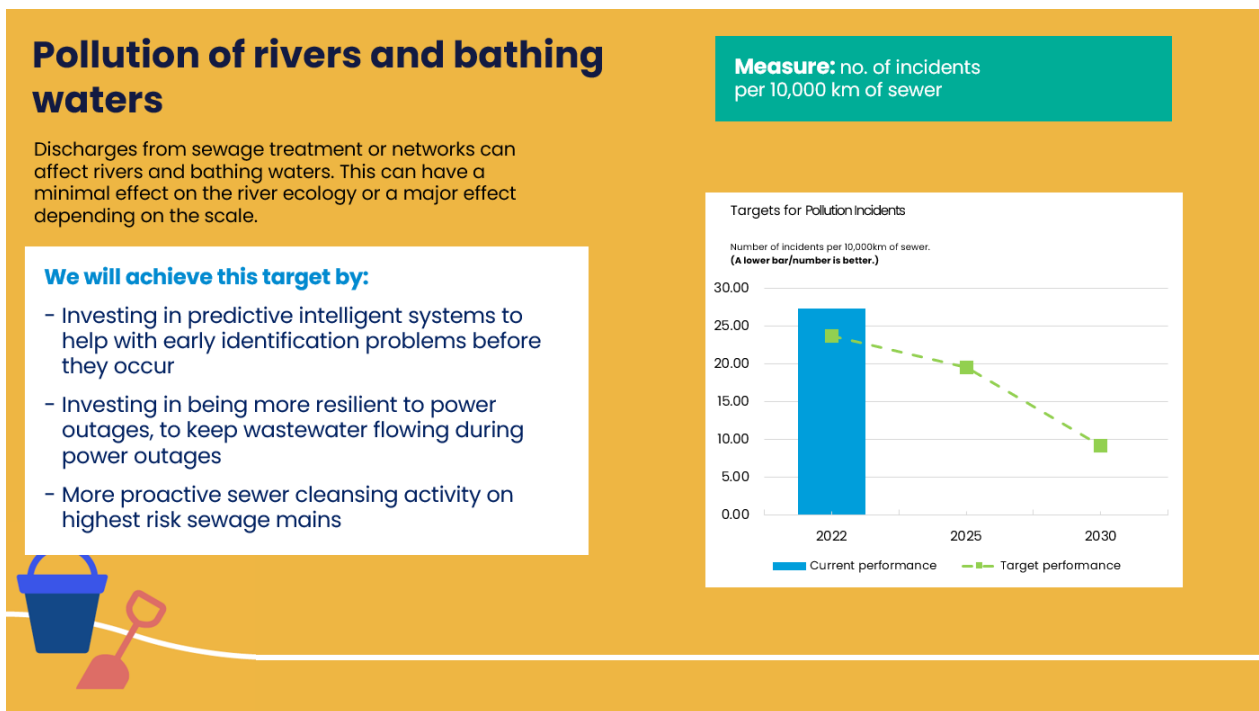


**Poorer performance**



against both their target and also the other water companies.

The following chart shows what Yorkshire Water is proposing doing to improve things:



Q20. Based on what you have just read, which of these three parts of the business plan is the most important to you?

***Please select one answer only***

- ☐ Sewage flooding **inside** of properties
- ☐ Sewage Flooding **outside** of properties
- ☐ Pollution Incidents
- ☐ Don't know/can't say



---

Q21. The following slide describes one of the additional components of Yorkshire Water's business plan;



### Enhanced investment:

Water Resource Management Plan (WRMP) & Water Industry National Environmental Programme (WINEP)

Water companies have a programme of work to meet environmental laws. These laws include:

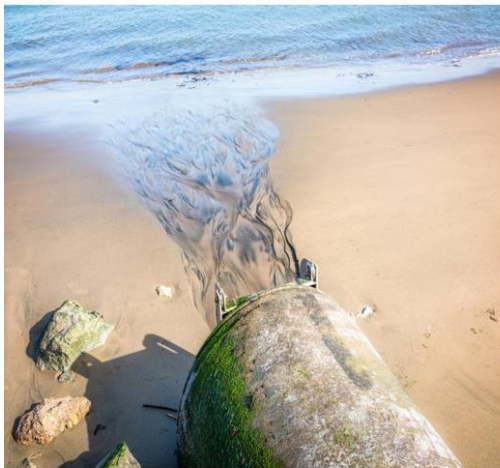
- Managing our water resources to ensure we can meet the needs of our customers whilst protecting the environment through not taking too much water from rivers and the ground.
- Treating wastewater to a standard that does not harm the natural environment is the largest part of the programme and includes removing phosphorous before treated wastewater is returned to the environment.
  - Phosphorous (P) is a normal part of wastewater and is harmless in small amounts however, it can be damaging when unmanaged. Normal sewage treatment doesn't remove P, so this investment allows us to upgrade our works to remove P, releasing less into rivers and the sea.

Yorkshire Water has a target in its business plan to deliver the expected statutory WINEP and WRMP programme of work for 2025-2030, and this will add **£32.40 per year** to the average household water bill.

---

Q22. The following slide describes one of the additional components of Yorkshire Water's business plan;

### Enhanced investment: Storm overflows



When there is too much rainfall for sewers to handle, storm overflows allow rainwater, mixed with sewage, to escape into a separate tank, once filled these tanks eventually flow into a river or the sea. This helps to reduce the risk of properties being flooded with sewage.

Each company in England has a target set by Government to reduce the use of storm overflows.

To work towards these longer-term targets, Yorkshire Water has a target in its 2025-2030 business plan to reduce spills from:

- 211 of the most problematic overflows, and
- 29 of its coastal overflows

This will increase the average household bill by **£12.70 per year**.

---

Q23. The following slide describes one of the additional components of Yorkshire Water's business plan;

## Enhanced investment: Drinking Water Quality & Security

Our job is to continually provide clean safe drinking water.

We have a target in our business plan to deliver the below drinking water quality and security targets:

- Invest in water treatment works at risk of new types of failures e.g. rapidly changing weather patterns
- Continue to invest in the removal of lead from our pipes
- Ensuring our key treatment works are protected from terrorist or cyber attacks.

This activity will increase the average household bill by **£1.30 per year.**



---

Q24. Based on what you have just read, which of these three parts of the business plan is the most important to you?

***Please select one answer only***

- ☐ Water Resource Management Plan (WRMP) & Water Industry National Environmental Programme (WINEP)
- ☐ Storm overflows
- ☐ Drinking Water Quality & Security
- ☐ Don't know/can't say

---

Q25. The following slide describes one of the additional components of Yorkshire Water's business plan;



## Enhanced investment: Further increasing water supply resilience

Yorkshire Water has a number of zones where customers are at increased risk of experiencing a water supply interruption due to only having a single water treatment works delivering their water.

This investment would enable Yorkshire Water to secure alternative supplies of water for 135,000 customers, reducing their risk of interruptions.

Yorkshire Water has a target in its business plan to deliver this improvement for 2025–2030 – this will add **£1.50 per year** to the average household water bill.

---

Q26. The following slide describes one of the additional components of Yorkshire Water's business plan;

## Enhanced investment: Net Zero Carbon



The water sector agreed a goal to reach Net Zero Carbon by 2030. Playing our part to reduce global carbon emissions and limit the impact of climate change.

Yorkshire Water's business plan includes enhanced investment to:

- Install more solar renewables, and move our self-generation from 18% to 30%
- Make process upgrades in wastewater treatment which will allow us to generate more energy from waste and reduce our wastewater treatment emissions by 30%

This activity will add **£0.60p per year** to the average household water bill.

---

Q27. The following slide describes one of the additional components of Yorkshire Water's business plan;



## Enhanced investment: Further increasing resilience to flooding

The aim of this work is to create a new approach to surface water management for the whole of Yorkshire which relies upon more natural/environmentally friendly infrastructure to improve flood resilience as opposed to carbon intensive traditional approaches i.e. concrete tanks in the ground.

This innovative work will start in the most impacted part of our region Hull and East Riding, and learnings will rollout across Yorkshire afterward.

Yorkshire Water has a target in its business plan to deliver this programme of work for 2025–2030 – this will add **£0.30p per year** to the average household water bill.



---

Q28. Based on what you have just read, which of these three parts of the business plan is the most important to you?

***Please select one answer only***

- ☐ Further increasing water supply resilience
- ☐ Net Zero Carbon
- ☐ Further increasing resilience to flooding
- ☐ Don't know/can't say

---

Q29. Based on everything you have seen and read about Yorkshire Water's proposed business plan, how acceptable or unacceptable is it to you?

***Please select one answer only***

- ☐ Completely acceptable **Please go to Question Q31**
- ☐ Acceptable **Please go to Question Q31**
- ☐ Unacceptable **Please go to Question Q30**
- ☐ Completely unacceptable **Please go to Question Q30**
- ☐ Don't know/can't say

---

Q30. **Answer if you selected "Unacceptable" or "Completely unacceptable" at question 29 (Q29 above)**

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

***Please choose up to two answers only***

- ☐ The bill increases are too expensive
- ☐ Company profits are too high
- ☐ Companies should pay for service improvements
- ☐ I expect better service improvements
- ☐ The plan is poor value for money
- ☐ Compared to energy prices it is more expensive
- ☐ I am dissatisfied with current services
- ☐ The plans don't focus on the right services

- ☐ I won't be able to afford this
- ☐ I don't trust them to make these service improvements
- ☐ Other 1, please specify \_\_\_\_\_
- ☐ Other 2, please specify \_\_\_\_\_
- ☐ Don't know/ can't say

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**Q31. Answer if you selected "Acceptable" or "Completely" acceptable at question 29 (Q29 above)**

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

***Please choose up to two answers only***

- ☐ The plan is good value for money
- ☐ The plan is affordable
- ☐ Compared to energy prices it's cheaper
- ☐ Their plans seem to focus on the right services
- ☐ The company provides a good service now
- ☐ I support what they are trying to do in the long term
- ☐ The change to my bill is small
- ☐ I trust them to do what's best for customers
- ☐ I have been dissatisfied with the service recently but am pleased that they are making improvements
- ☐ Other 1, please specify \_\_\_\_\_
- ☐ Other 2, please specify \_\_\_\_\_
- ☐ Don't know/ can't say

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**Q32. Long term investment by Yorkshire 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?**

***Please select one answer only***

- ☐ 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

## Household Demographic

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**Q33. Thank you. Now just a few questions to check that we are speaking to a wide range of people.**

In which of the following ways do you identify?

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

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- ☐ **High 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
- ☐ Retired **Please go to Question Q35**
- ☐ Student
- ☐ Prefer not to say

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**Q34. Answer if you have selected “retired” at question 34 (Q34 above)**

Does the main income earner have a state pension, a private pension or both?

- ☐ State only
- ☐ Private only **Please go to Question Q36**
- ☐ Both **Please go to Question Q36**
- ☐ Prefer not to say

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**Q35. Answer if you have selected “Private only” or “Both” at question 35 (Q35 above)**

How would you describe the main income earner’s occupation type before retirement?

- ☐ **Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)
- ☐ **Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
- ☐ **Supervisory or clerical/ junior managerial/ professional/ administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)
- ☐ **Skilled manual work** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)
- ☐ **Semi or unskilled manual work.** (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)
- ☐ None of these
- ☐ Prefer not to say

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**Q36.** 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.

***Please select all that apply***

- ☐ 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 (i.e. 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

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Q37. What is your ethnic group? Choose one option that best describes your ethnic group or background

***Please select one answer only***

**WHITE**

- ☐ English, Welsh, Scottish, Northern Irish or British
- ☐ Irish
- ☐ Gypsy or Irish Traveller
- ☐ Any other White background

**MIXED**

- ☐ White and Black Caribbean
- ☐ White and Black African
- ☐ White and Asian
- ☐ Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- ☐ Indian
- ☐ Pakistani
- ☐ Bangladeshi
- ☐ Chinese
- ☐ Any other Asian background

**BLACK OR BLACK BRITISH**

- ☐ Caribbean
- ☐ African
- ☐ Any other Black background

**OTHER ETHNIC GROUP**

- ☐ Arab
- ☐ Any other ethnic group
- ☐ Prefer not to say

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Q38. Which of the following bands does your household income fall into from all sources before tax and other deductions?

***Please select one answer only***

- ☐ Up to £199 a week/Up to £10,399 a year
- ☐ From £200 to £299 a week/From £10,400 to £15,599 a year
- ☐ From £300 to £499 a week/From £15,600 to £25,999 a year
- ☐ From £500 to £699 a week/From £26,000 to £36,399 a year
- ☐ From £700 to £999 a week/From £36,400 to £51,999 a year
- ☐ From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- ☐ From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- ☐ £2,000 and above a week/£104,000 and above a Year
- ☐ Don't know
- ☐ Prefer not to say

## Classification Questions

Q39. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- ☐ Amazon voucher
- ☐ M&S Voucher
- ☐ One4All

☐ Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

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Q40. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

☐ Yes

☐ No

Yorkshire Water offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

<https://www.yorkshirewater.com/bill-account/help-paying-your-bill/>

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.



# APPENDIX G

## Cognitive Testing Report

Question	Comments	Action
General	<p>In general ,the survey was well received with participants stating the following about it:</p> <ul style="list-style-type: none"> <li>• Was not too long</li> <li>• The question wording wasn't too long or they couldn't understand</li> <li>• The information in the survey was seen as interesting</li> <li>• It was seen as informative</li> <li>• The graphs were seen as helpful</li> <li>• Easy to navigate</li> <li>• The information was given in good bite size chunks – the options to choose from were at good intervals instead of 'going for too long with too much information to remember'</li> <li>• Liked the costing of the sections</li> <li>• Felt it covered enough</li> </ul>	None required
	One participant mentioned some of the information was a bit wordy and was worried some other people that are not good at reading may struggle	None required – participants can spend as much time as they want to on reading the information
	One participant found some of the text too wordy and found some of the information unnecessary as they were only interested in the Yorkshire Water not the other companies as there is no choice about moving to another supplier.	None required – as previously mentioned participants can spend as much time as they want to read the text. The comparative data charts are guidance compliant, therefore we must show all companies.
	One participant said that reading this survey as a Yorkshire man and Yorkshire Water user feels that the costs now are 'coming home to roost' after understanding through the media on how the water companies apportion their money. Does not dispute that this needs to be done - but felt increasingly unhappy going through the information that the costs are being all passed onto the customer	None required
Q4 Are you solely or jointly responsible for your household's water and sewerage bill?	The participant suggested changing yes to 'We pay the bills together' to make it clearer	None required – this question is mandated and there is no room for us to change the wording options
Affordability ( Questions 9-13)	The questions in this section have generally been found easy to understand and participants did not have issues completing them.	None required

	One participant thought the wording for most of the questions was good, especially at not pinpointing the exact point of financial struggle by asking exactly when people cannot afford 'this' by allowing 'Sometimes' rather than every month or similar.	
	One participant said this section sets the scene for the later questions about higher costs and particularly the one asking if they should do the improvements now - or delay this for the next generation to take the burden of the costs at a future stage.	
	One participant commented whether there even should be questions about the affordability of the water bill as the water bill is mandatory not like any other services bill (e.g. Spotify) and there is no choice in suppliers	None required – these questions are mandated by the guidance
<b>Q12 How much are you currently paying for your water and sewage service bill?</b>	One NHH participant was not sure whether to answer this as per one location or for all of their location in the Yorkshire Water area	None required – at Q8A we ask participants to answer the questions thinking about all their sites that have water and sewage services provided by Yorkshire Water.
<b>Bill increase/inflation chart</b>	<p>The majority of participants were able to digest the information in the top half of the page and remarked that:</p> <ul style="list-style-type: none"> <li>• The information was clear and understandable</li> <li>• Some participants remarked that it was scary to see how much the bill is going to change</li> <li>• One participant liked that the pop-up nature of the figures if you hovered over them</li> </ul>	None required
	One participant mentioned that the information of the inflation is 'pointless' as everyone knows what inflation is.	None required – the guidance requires for this information to be added and other participants found this section useful
	A couple of participants commented that the bill could not be accurate as making predictions for 7 years is not possible.	None, not a major finding
	Two participants suggested that from the graph it looks like Yorkshire Water is putting the blame on the Bank of England for the increase of the bill – this is due to the increase in the orange part of the graph	None required

	One participant struggled with the chart. He did not understand the two colours and suggested just showing one, blue colour for the bill in total. He also did not notice the legend at the bottom and suggested moving it to the top	None required – this was a one-off comment. We have already included a total figure at the top of the bars. Suggest keeping the legend as it is at the bottom of the chart as if moved higher above would get in the way of the total figures and it would cause other problems.
	An NHH participant remarked that on a £1,200 bill – ‘This seems to show a huge jump in costs from 2025 - 2026 - from £1370 to £1748. As a business we know that prices are going up but the increases should be gradual so that we can cope with these changes. Potentially that level of increase in that short time would really be difficult to manage our cash flow.’	None required
Q14 /Q15(affordability of proposed bills)	The questions were easily understood by most participants	None required
	Two participants were confused about the options that says shop around – they were not sure whether it referred items such as everyday items or the water provider as they cannot chose other water providers	None required – the question is mandated and it has not been found as a general issue
	One participant suggested amending the wording of some of the options: <ul style="list-style-type: none"> <li>• Using my savings could be changed to cutting back on savings.</li> <li>• Include cutting back on going on holidays?</li> <li>• If 'I would use less water' is clicked, there should be a question that follows it asking how the participant plans to do so.</li> </ul>	None required – most participants were OK with the question as it is, participants also have the option to type their answers into the text box. This question is mandated– there is no room to change the options.
	One participant struggled to understand this was a multimode question	None required – there are clear participant instruction that say please select all that apply
Comparative Data (generally)	<ul style="list-style-type: none"> <li>• Participants have struggles to understand the comparative data tables at first, but after a few tables the information became easier to understand.</li> <li>• a number have commented the information in the two boxes above the tables (have/have not met target and ranking) have helped them understand</li> </ul>	None required
	One participant commented that they generally found the section to be ok, especially showing how they are planning to improve each area. The information is simple and straight forward. There’s not too much to read and they thought that was good. I can see all the key points.’ I wouldn't change anything.’	None required

	The infographic charts have all been generally well received, however there have been some general comments about potentially simplifying the language and using more layman terminology.	Yorkshire Water to potentially revisit the terminology used in these slides
	One participant was interested to see where Yorkshire Water are in the league table, and thought the slides were clear - the charts showed the trend.	None required
	One participant commented that with the media screening on the water companies at the moment the survey seems to show that the improvements needed would be affordable rather than the hikes in cost which seem to be shown by the news.	None required
	One participant appreciated the figures being shown as for them it translated as Yorkshire Water wanting to be honest with their customers. At the same time the participant found the numbers confusing and felt that ranking would have sufficed	None required
	One participant specified that they like the blue and white proposed improvement slides because they are the same colour as Yorkshire water branding and was not sure about the colours of the other slides and the images at the bottom	None required
	One participant mentioned preferring the graph to the tables, as it only referred to Yorkshire Water and does not include the other water companies	None required
	Two participants mentioned having difficulty reading the legend in the performance data charts	We will increase font size in the charts
	<ul style="list-style-type: none"> <li>One participant suggested to highlight the has/has not met targets in either red or green and remove the underline</li> <li>Another participant was suggesting taking the bold of the text and just have "have" or "have not" as bold</li> </ul>	None required- this has not been an issue before as participants have found these boxes helpful as they are, and we are following guidance
	One participant suggested including the targets in all the slides	None required – there have been a few iterations of these slides and they are now guidance complaint
Unplanned interruptions	Two participants said it was good and straight forward slide– appreciated that it didn't have information overload on it	None required

Leakage charts/slide	One participant from an area where they have frequent interruptions has mentioned having issues reading and interpreting the information on the chart as they could not clearly see what it meant. They also mentioned that they would have liked to see the target	Increase the font size in the legend so it is clear that the x axis refers to seconds. The target is included in the chart, but not in the comparative data tables as per guidance
	One participant suggested adding a comment that the target is a national target and not self-imposed	None required - The comparative data tables follow guidance and this was a one-off comment
	Two participants have questioned why the target for planned interruptions is going up in 2030 compared to 2025	None required – chart matches the data.
	Two participants had difficulty understanding the terms - "acoustic logger" and one had difficulty understanding "networking conditioning"	Potentially adapt text language or add a bit more information around these terms
Water quality	One participant was not sure what the connection to the cup of tea was on this slide - they would have liked seeing tea referenced in the slide if there is an image of it	None required – no one else had issues with it
Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants generally responded on what they thought they would be most affected by personally	None required
Internal sewer flooding	One participant felt this slide worked very well – ‘Yorkshire Water is blue so it fits with their branding. I'm drawn to the white box. Stands out more than the text above the white box that is without a box.’	None required – the main information is in the white box, the part above is the chart title
	One participant has mentioned moving the bullet point about educating customer about sewage higher up in the list	YW to potentially consider reordering
	One participant suggested making reference that the sewage can affect business as well not just households	None required – no one else mentioned this
External sewer flooding	Generally, this slide was well received however it had a couple of comments about the terminology	YW to potentially consider rewording information
	One participant suggested the slide should read "increase the responsibility of the flooding response team"	

	Two participants mentioned that the detail on the slide is somewhat repetitive	None required – the improvements are linked; therefore, some repetitiveness is expected
	One participant wanted to know more about what customer sewer alarms were and where would they be installed	None required – outside of scope for this research
Pollution	One participant mentioned including an explanation as to how the pollution occurs and what a pollution incident is.	None required – outside of scope for this research
	A participant mentioned they would have preferred a boat on this page instead of the bucket and spade	YW to potentially consider changing the design, but this has not been an issue with any other participants
	One participant would like to say that pollution ‘does’ affect rivers rather than it ‘can’	None required – based on evidence can is the correct wording
Q23 Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants have chosen again based on what they felt it was most important to them	None required
Additional enhancements (Generally)	Participants have remarked that the slides in this section are giving clear information. There's not too much information here but it's telling you everything you need to know. If there was too much information some people might not read it. It's short and simple.	None required
	<ul style="list-style-type: none"> <li>One participant noticed at the bottom of each page there is an amount specified of exactly how much the increase will be. They suggested potentially having a slide showing how much the overall increase is, adding it all up. Show how much overall it will cost to do this</li> <li>Another participant suggested including a running total at the bottom of the slide</li> </ul>	YW to potentially consider if this is necessary or if it would add any benefits. Alternative might be not including the cost of each (since the total does not add up to the total bill increase).
	One participant suggested that all these slides should only have 1-2 bullet points and links to the Yorkshire websites if people want to know more	None required – the information needs to be shown as this is the purpose of the research

	<ul style="list-style-type: none"> <li>One participant was confused by the cost at the bottom of each slide and asked and was not sure what was this for</li> <li>The participant also questioned why would costs be added to their bills if they are doing improvements in the Bradford area (which they did not live in)</li> </ul>	Consider removing
	One participant liked that the cost of the improvement was highlighted in bold and suggested to bold the word 'Add' as well to make it clearer that this will be on top of the annual bill	YW to potentially consider this
	One participant struggled to equate what the average household increase would mean for them as they lived on their own	None required
	One participant suggested adding numbers at the top of the slide such as 1 of 6. 2 of 6 enhancements etc.	None required – no one else seemed to have an issue with how the enhancements were presented
Water Resource Management Plan (WRMP) & Water Industry National Environmental Programme (WINEP)	One participant mentioned the title for this slide was long and had to look up the acronym again when they got to the end	
	<ul style="list-style-type: none"> <li>One participant mentioned liking the picture, but felt that the word Phosphorus was used quite a lot</li> <li>Another participant would have like the paragraph on Phosphorus the same size as the other text as found it harder to read</li> </ul>	
	One participant suggested to add an asterisk to the word 'phosphorus' in the first paragraph, linking it to the sub-bullet point	
	One participant suggested the cost for this is really high.	
Storm overflows	One participant said the overflows slide was the clearest as it also gave the areas which were affected. Knowing where the problems were was found to be more relatable.	None required
	One participant liked the picture.' Very much what you would expect to see on a Yorkshire beach.'	



	<ul style="list-style-type: none"> <li>One participant felt that the small text at the bottom threw them off as it gave them the impression that what was said in the main part could have been simpler</li> <li>Participant felt the wording was not quite right as any overflowing is seen as problematic.</li> </ul>	YW to potentially consider rewording information
Drinking Water Quality & Security	One participant was not keen on the picture and also suggested that instead of 'statutory obligation' use the phrase "our obligation".	YW to potentially consider rewording
	One participant felt the wording could be changed on one of the first sentences to 'Our job is to continually provide clean safe drinking water.', it puts the focus on the word 'continually'	
	One participant was not fan of the picture – suggested there could be better images available to depict safe drinking water	
	One participant felt that the quality of the water, climate change and terrorism need to be split up and each explained. They've not explained each bit well enough.	YW to potentially consider
	One participant had an issue with the word climate change and suggested to change it to 'environmental change' or 'rapidly changing weather patterns' like further down the slide as they switch off when they read that word	None required
Further increasing water supply resilience	<ul style="list-style-type: none"> <li>A number of participants were confused why Bradford was specifically mentioned as there are other zones</li> <li>Some participants did not understand why Bradford would be relevant to them as they did not live there</li> </ul>	Potentially think about altering the text to not include any of the zones
Net Zero Carbon	One participant felt the picture was not really relevant for this, but the information was clear	None required
	One participant noted that the Net Zero figure was low - saying that they thought that Yorkshire Water had a number of opportunities that they would not have in reducing their own carbon footprint - going by the slide more room for solar panels or wind farms.	None required

	One participant asked why should they pay more if Yorkshire Water is looking to save energy themselves?	
Further increasing resilience to flooding	One participant felt that the last sentence in the second paragraph could end after "flood resilience" and there is no need for "as opposed to carbon...". The environmental focus has already been mentioned.	None required
	One participant was not sure what carbon intensive traditional approaches meant	None required
	One participant was not sure the two areas were mentioned in this slide as they don't live there	None required – it is only one off and it is clear why these two examples are given
Q27/Q31 Based on what you have just read, which of these parts of the business plan is the most important to you	<ul style="list-style-type: none"> <li>A couple of participants said they would have liked more than one option at this question</li> <li>One participant suggested ranking all these options in order of their importance rather than having to choose</li> </ul>	None required – these questions follow the guidance
Q34. What are the two main reasons that you feel the proposals for your water supply are acceptable?	One participant struggled to understand the 'other please specify' boxes. They suggested using 'if none of the above, please use other'.	None required, one off feedback.
	One participant suggested making the participant instruction bold to make it clearer that only two options can be selected as the squares make you think you can choose as many	None required, one off feedback.
Q35. Long term investment by Yorkshire 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 answer to this question was polarised, however participants did not have issues answering this	None required
	One participant suggested there should be an option for some sort of middle ground, increasing the bill continually. The reason for this being that people struggle now and can't pay, but that doesn't mean future generations should take the burden.	None required, one off feedback.
	Participants felt that it is better to start now as it is everybody's responsibility	None required

Gender question	One participant mentioned they like the wording 'identify in another way' for this question – felt inclusive	None required
QEND	One participant remarked it was nice to have the link at the end where people can go and get support if needed be.	None required

