

WaterVoice Social Tariffs

Summary report
December 2020



The voice for water consumers
Llais defnyddwyr dŵr

Contents



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Background, objectives and methodology

Background and Objectives



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Social tariffs are schemes that give on-going reduced bills for lower income households. In order to better understand attitudes towards Social tariffs, CCW has partnered with Yonder to conduct research into this area.

This research looks to answer four key objectives which have been outlined below:

1

To identify the extent of support for schemes that reduce water bills for low-income households struggling to pay

2

To identify current awareness of water company schemes which reduce bills for lower income households struggling to pay

3

To determine consumer views on the acceptability of paying for social tariffs in different ways

4

To examine any differences by consumer demographics and sub-groups



Online survey of 2,132 adults (aged 18+) in England and Wales



Conducted online between 14-15th December 2020 using Yonder's online panel



The full sample is representative of the England and Wales population, and the data has been weighted to be representative of England and Wales as individual nations

Boost interviews were conducted among consumers in Wales to allow for robust analysis and weighted back into the overall sample at the correct proportions.

This report highlights results at an overall level as well as by the following sub-groups:

England	n=1,722
Wales	n=410
Bill payer	n=1,939
Non bill payer	n=171

Results are also charted for other sub-group categories of interest when data is significantly different to the total.

The statistical reliability of the data at 95% confidence level is outlined below:

Sample Size	Margin of Error for response of 50%
Total sample	+/- 2.1%
England	+/- 2.4%
Wales	+/- 4.8%
Bill payer	+/- 2.2%
Non bill payer	+/- 7.5%

Executive summary

Executive summary



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Agreement that low income households who are struggling to pay their water bills should be helped by schemes that reduce their bills

Overall, three-in-four agree that those struggling should be supported to pay their water bill. Agreement is significantly higher among consumers in Wales.

Agreement varies by sub-group – with renters, low income groups and those with a disability more likely to agree that those struggling should be supported.

Awareness of water companies offering social tariffs*

A quarter are aware that water companies currently offer social tariffs. Bill payers have significantly higher awareness than those who don't have responsibility for paying their water bill.

Awareness is generally higher among those who may be more likely to qualify for social tariffs – renters, those not working or seeking work, those with a disability and those in larger households.

Acceptability of how financial assistance is funded

Funding of social tariffs through water company profits is by far the most acceptable option to consumers, with four-in-five finding this acceptable. More than half find the use of government funds acceptable, while a third think it is acceptable that this is paid for out of other customers' bills.

Use of water company profits is particularly favoured by homeowners, retired consumers and those with a disability. While those in Wales, consumers in social grade AB**, renters and minority ethnic groups are most likely to find the use of government funds acceptable. Minority ethnic consumers, those in larger households and council renters are most likely to agree that social tariffs should be funded through other customers' bills.

*Social tariffs are schemes that give on-going reduced bills for lower income households

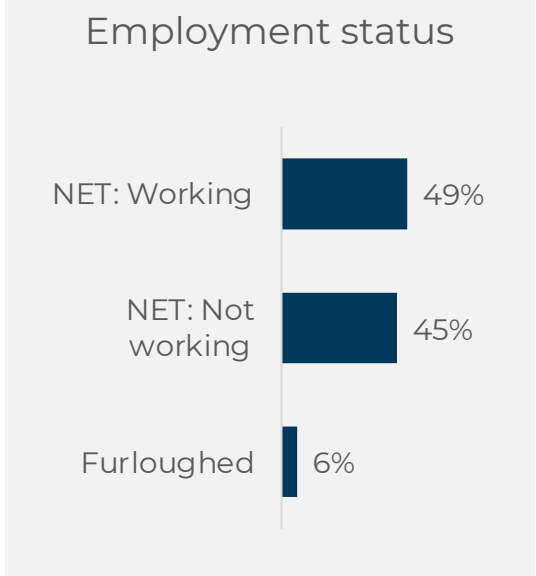
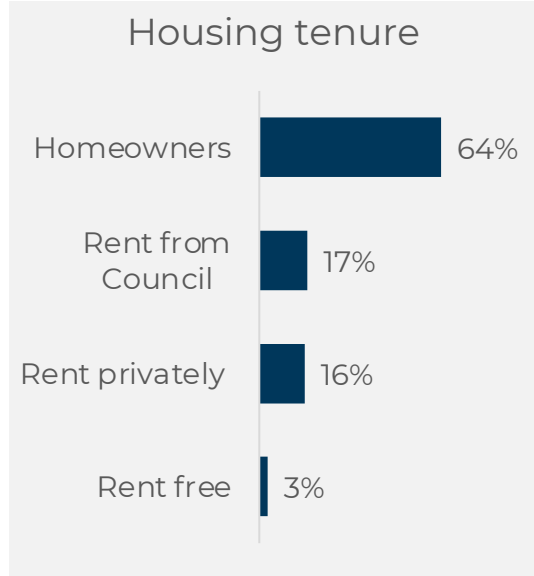
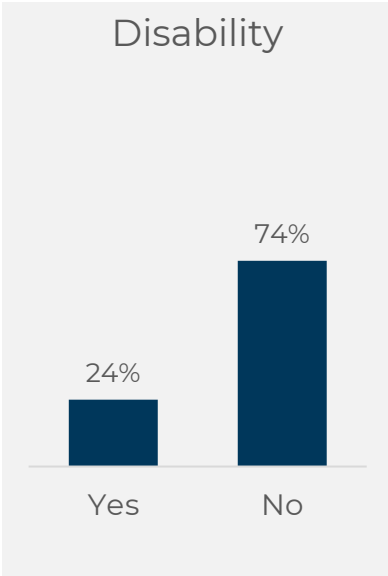
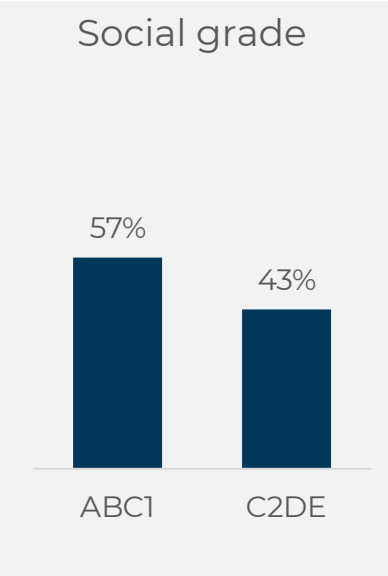
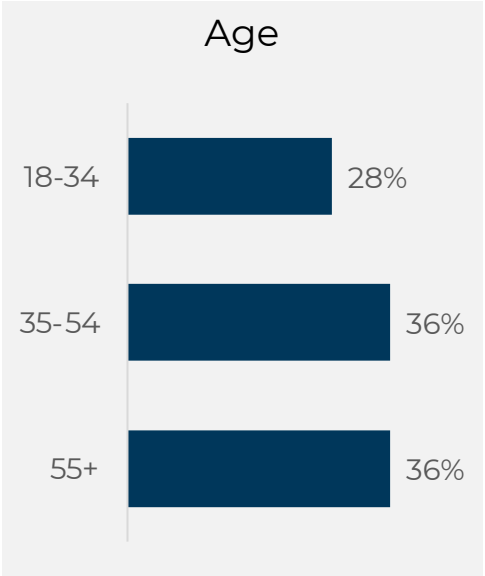
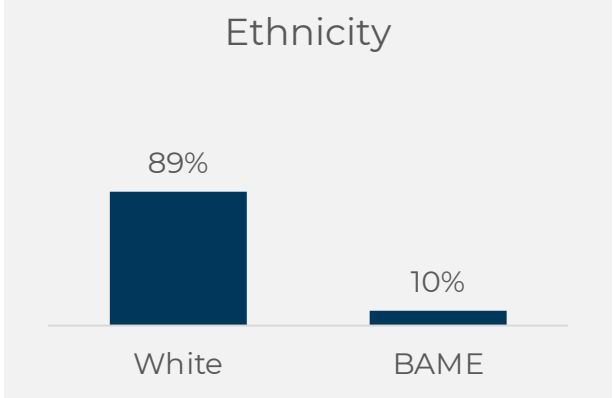
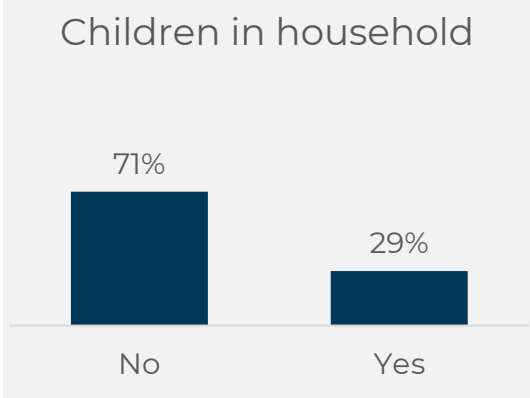
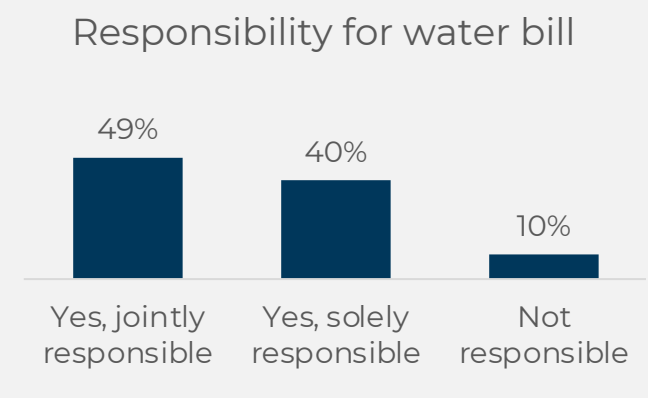
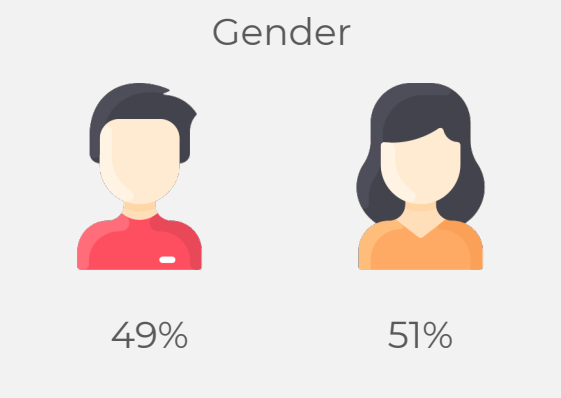
**Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is semi-skilled and unskilled manual workers, state pensioners, casual workers and unemployed with state benefits only

Respondent profile

Respondent profile



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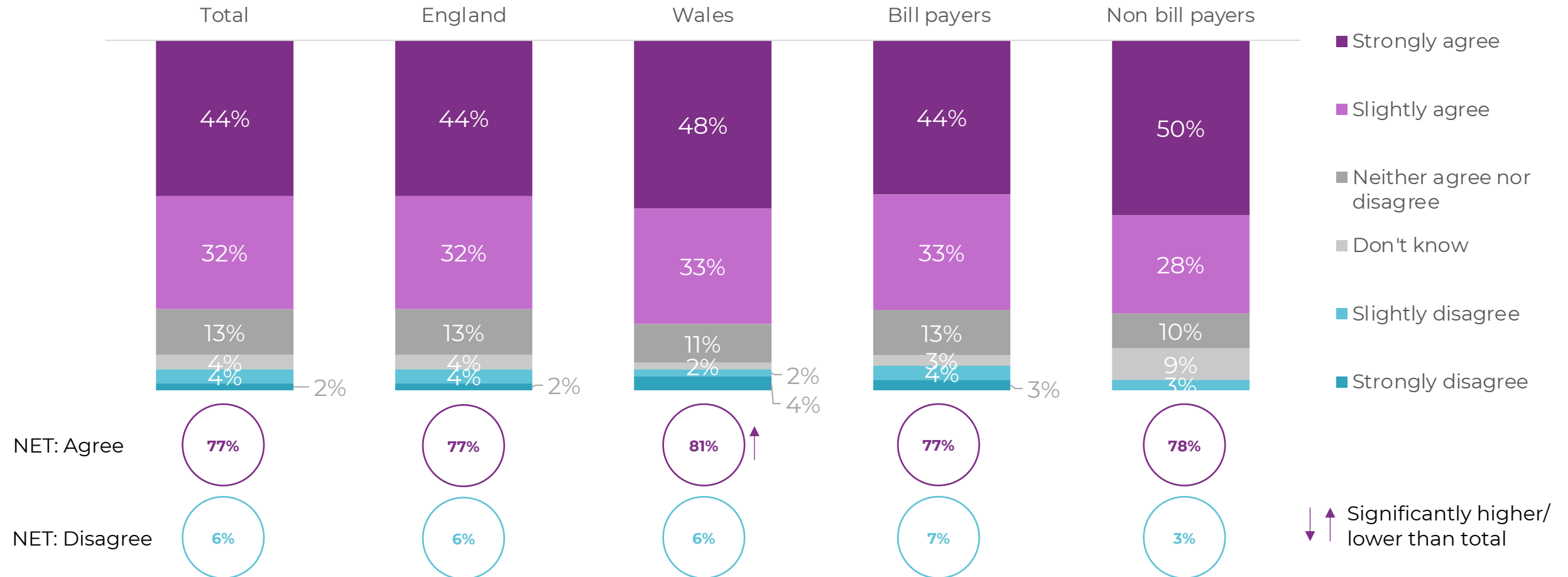


Findings



Three-quarters agree that those struggling should be helped by schemes that reduce their bill. Support for this is significantly higher in Wales

Agreement that low income households who are struggling should be helped by schemes that reduce their bill



Social Tariffs

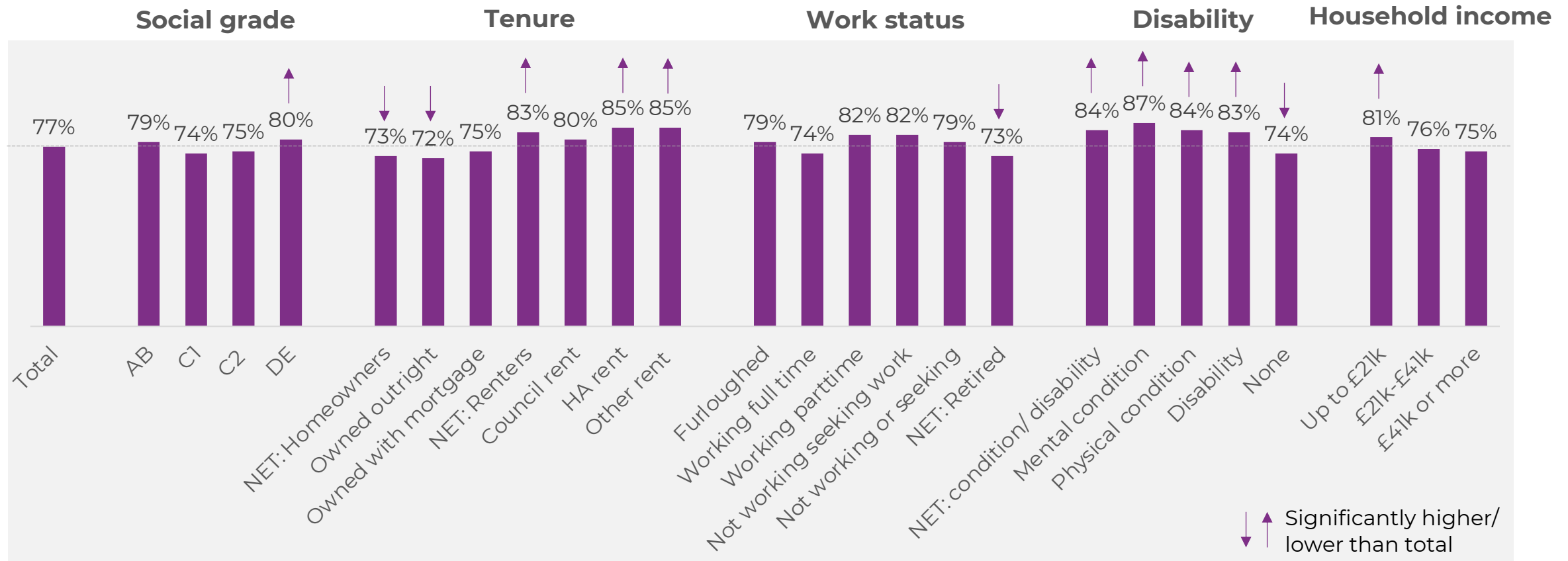
Q.1 To what extent do you agree or disagree that low income households who are struggling to pay their water bills should be helped by schemes that reduce their bills?

Base: All respondents (n=2,132), England (1,722), Wales (410), Bill payers (1,939), Non-bill payers (171)

Renters, low income households and those with a disability are more likely to agree that those struggling should be supported

Agreement that low income households who are struggling should be helped by schemes that reduce their bill

% agree



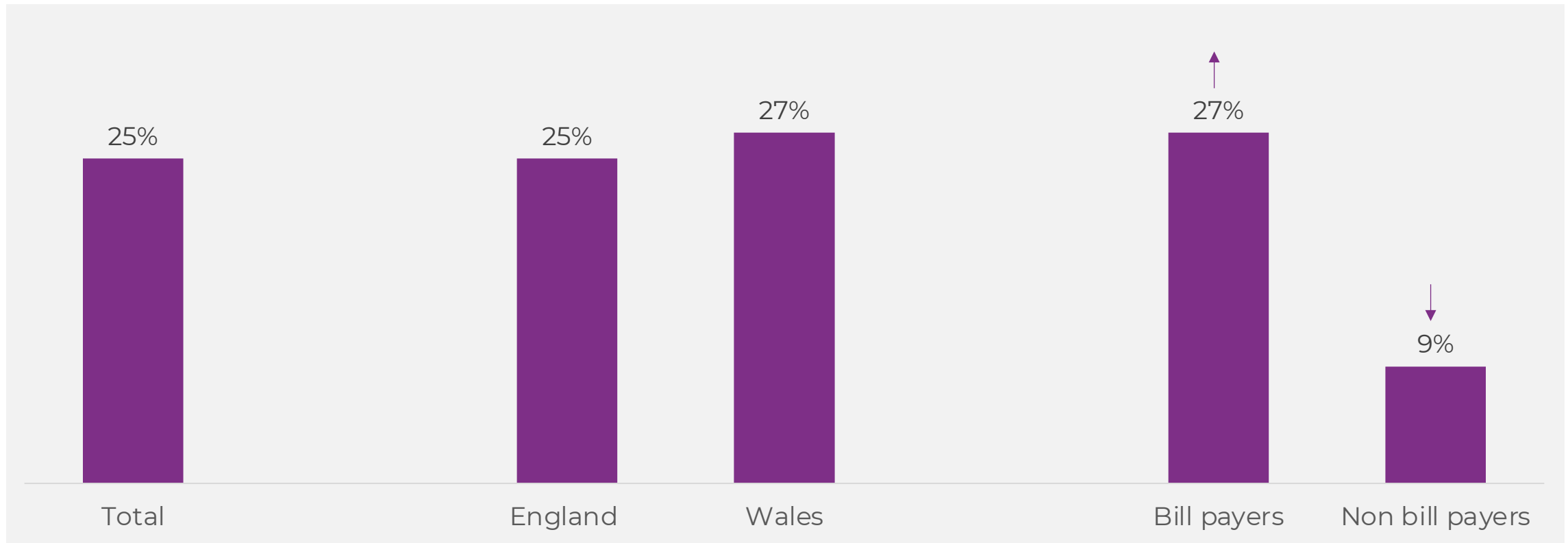
A quarter are aware that water companies offer help to those struggling. Non-bill payers are less well informed about this



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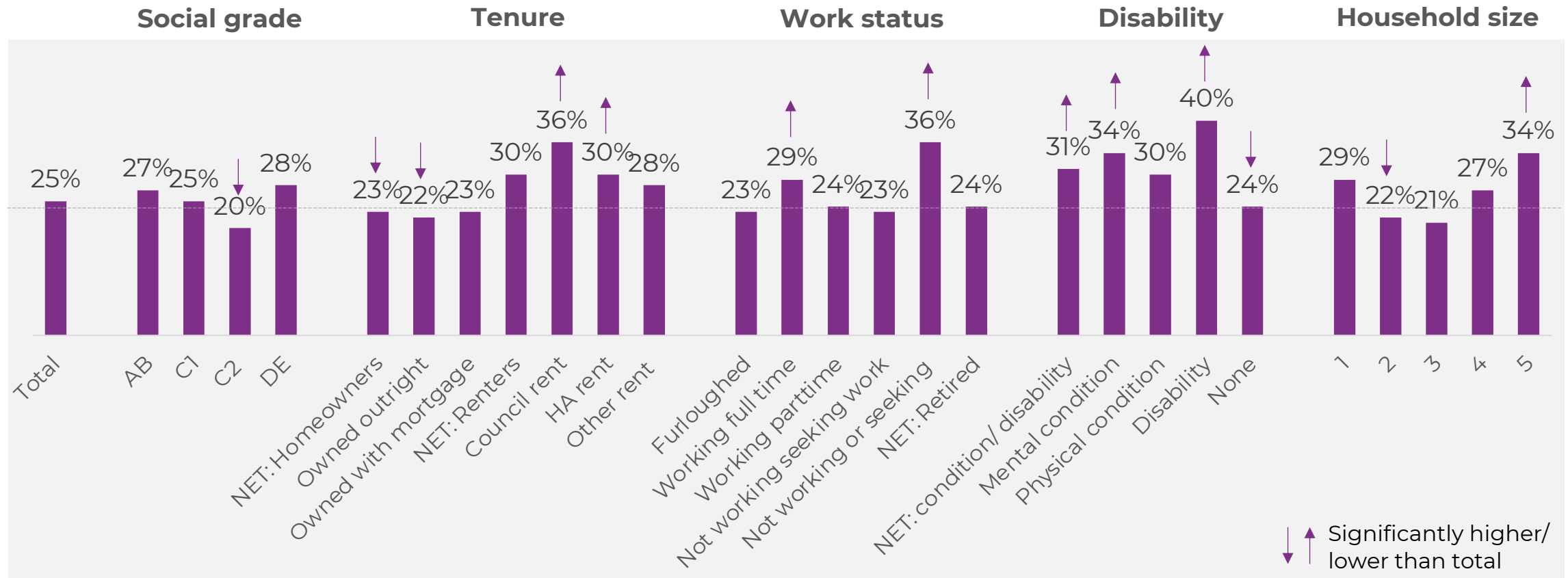
% who are aware their water company offers help to those struggling

↓ ↑ Significantly higher/
lower than total



Awareness of support for those struggling is highest among renters, those not working or seeking work, those with a disability and those in larger households

% who are aware their water company offers help to those struggling



Acceptability of social tariffs is highest when funded using water company profits



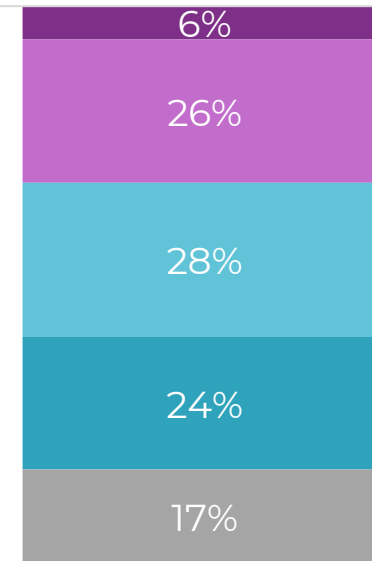
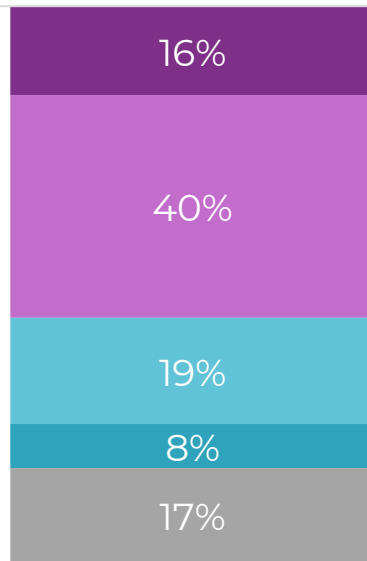
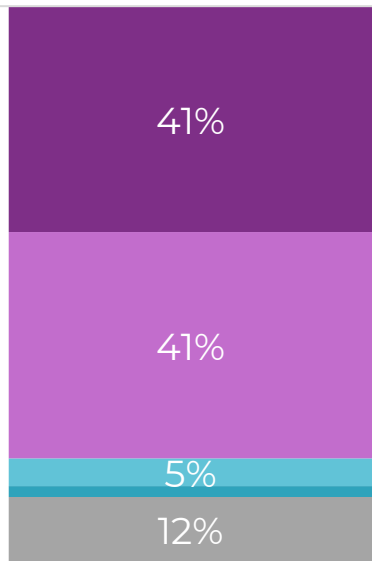
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Acceptability of how financial assistance is funded

Using water company profits

By Government, using public funding

Through other customers' water and sewerage bills

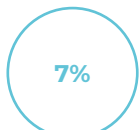


- Very acceptable
- Quite acceptable
- Quite unacceptable
- Not acceptable at all
- Don't know

NET:
Acceptable



NET:
Unacceptable



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Q.3 How acceptable or unacceptable do you think it is for this financial assistance to be funded (in part or whole) in the following ways.

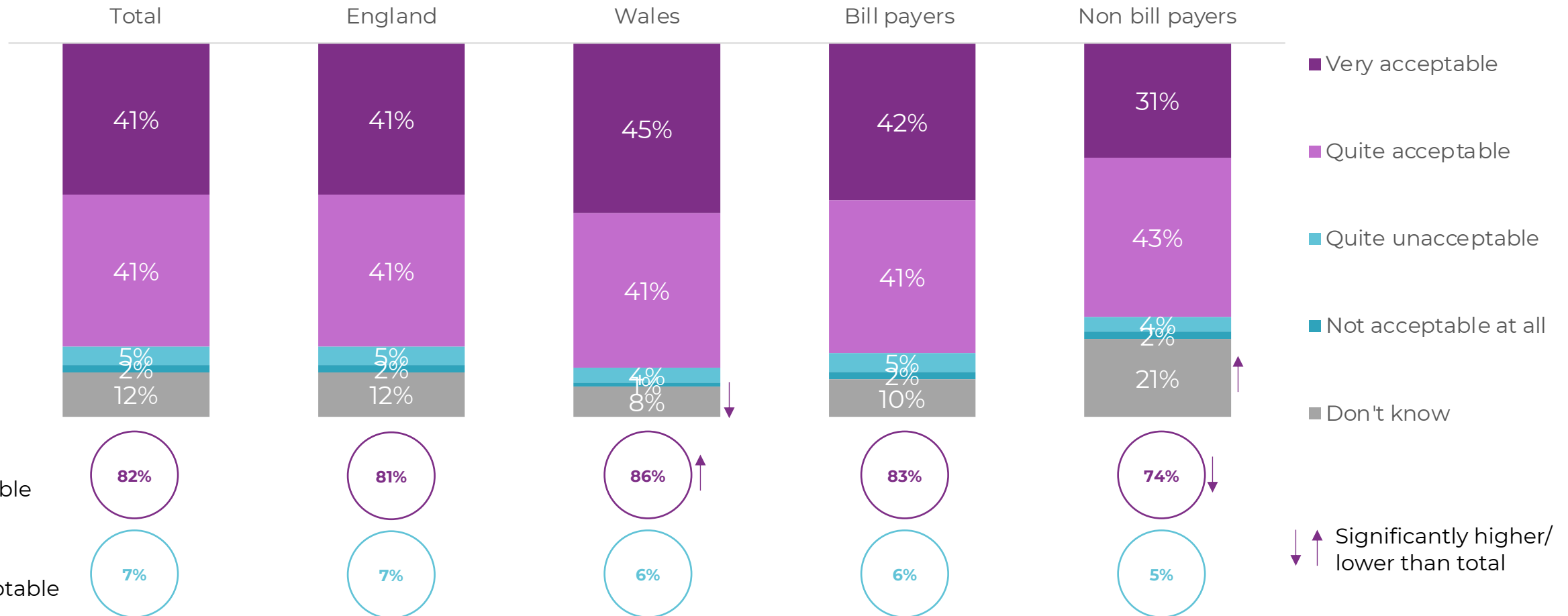
Base: All respondents (n=2,132)

Those in Wales are significantly more likely to agree that social tariffs should be funded using water company profits



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Acceptability of how financial assistance is funded: Using water company profits



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Q.3 How acceptable or unacceptable do you think it is for this financial assistance to be funded (in part or whole) in the following ways:

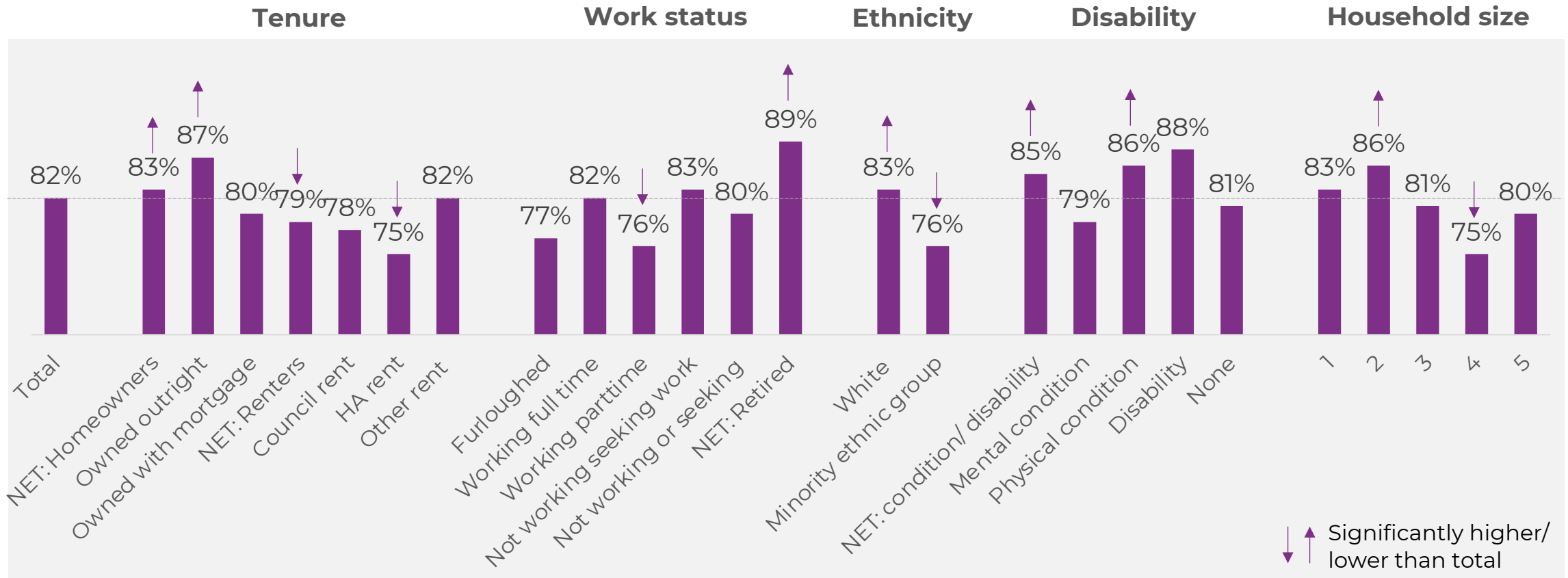
Base: All respondents (n=2,132), England (1,722), Wales (410), Bill payers (1,939), Non-bill payers (171)

Homeowners, retired consumers and those with a disability are most likely to agree that assistance should be funded through water company profits



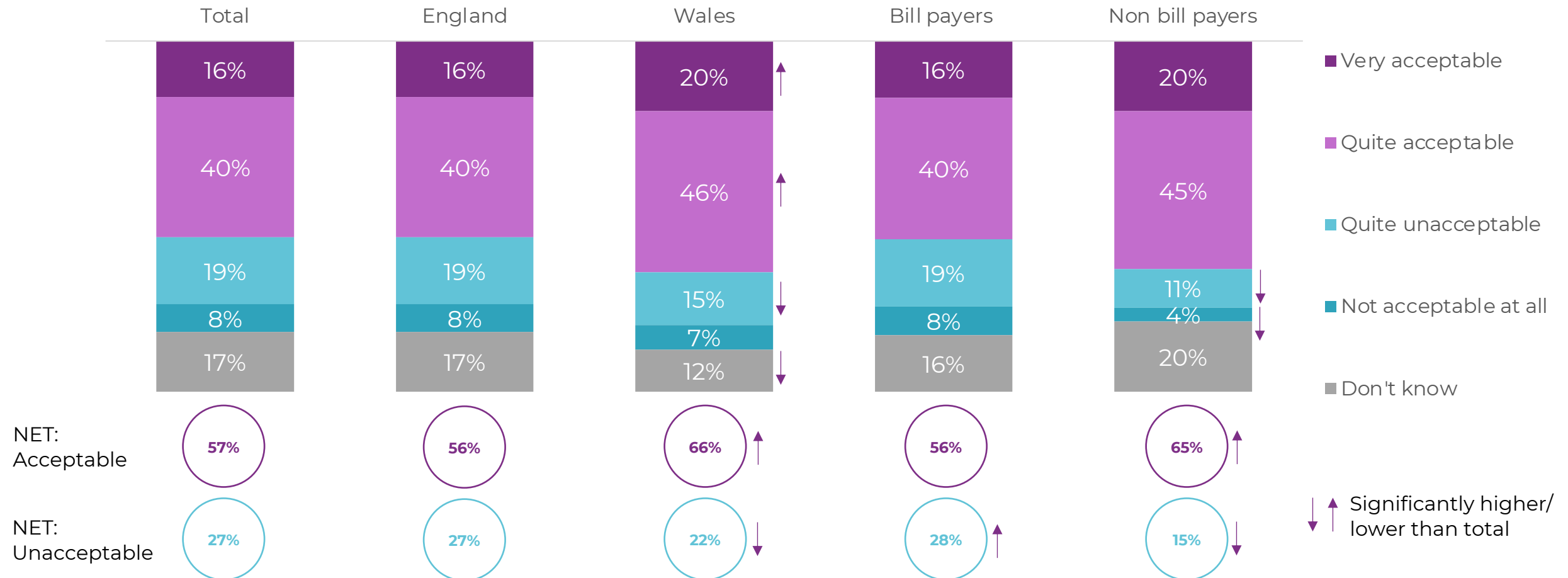
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Acceptability of how financial assistance is funded: Using water company profits
% find this acceptable



Consumers in Wales and non-bill payers are significantly more likely to think that financial assistance should be funded by the government

Acceptability of how financial assistance is funded: By Government, using public funding



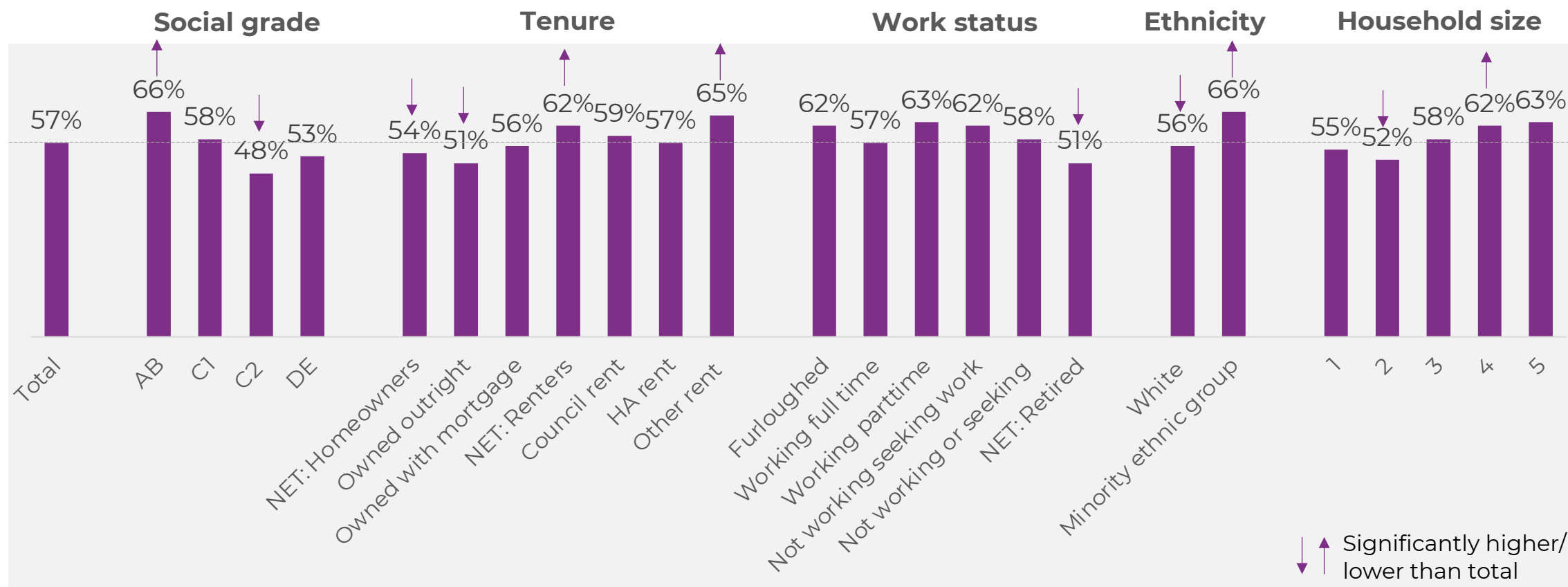
Social Tariffs

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Base: All respondents (n=2,132), England (1,722), Wales (410), Bill payers (1,939), Non-bill payers (171)

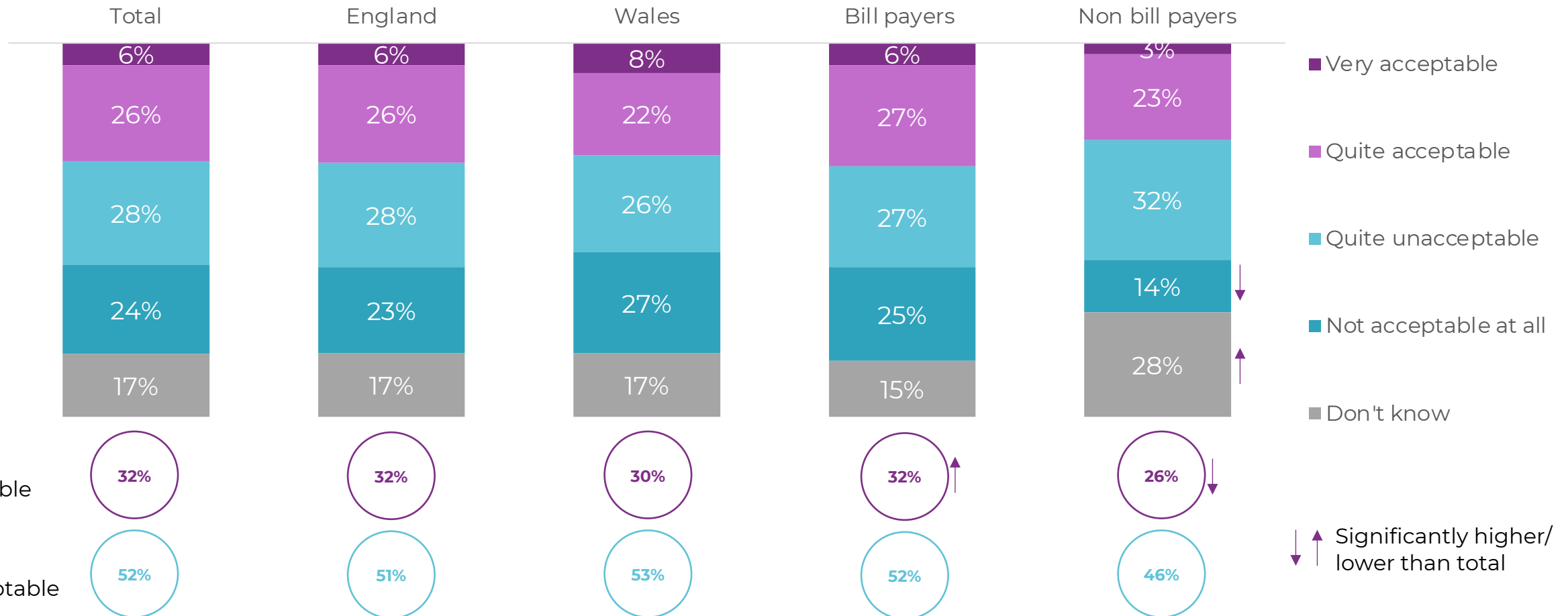
Consumers in social grade AB, renters and minority ethnic groups are most likely to find the use of government funds acceptable

Acceptability of how financial assistance is funded: By Government, using public funding
% find this acceptable



Non bill payers have less of an opinion about whether financial assistance should be funded through customers' bills

Acceptability of how financial assistance is funded: Through other customers' water and sewerage bills



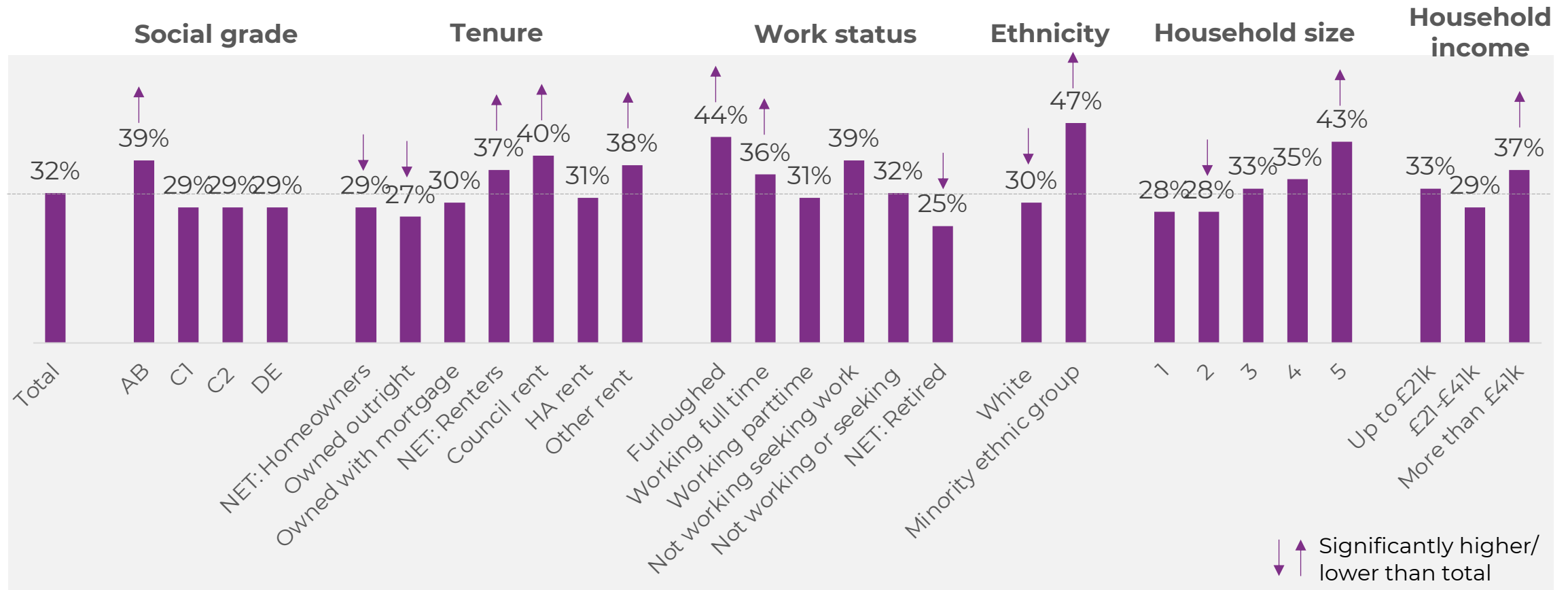
Social Tariffs

Q.3 How acceptable or unacceptable do you think it is for this financial assistance to be funded (in part or whole) in the following ways:
 Base: All respondents (n=2,132), England (1,722), Wales (410), Bill payers (1,939), Non-bill payers (171)

Council renters, minority ethnic groups, social grades AB and higher earners are most likely to agree that social tariffs should be funded through customers' bills



Acceptability of how financial assistance is funded: Through other customers' water and sewerage bills
 % find this acceptable



Q.3 How acceptable or unacceptable do you think it is for this financial assistance to be funded (in part or whole) in the following ways:
 Base: All respondents (n=2,132), sub-groups (n=112-1,939)

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