

The logo for 'explain' is located in the top left corner. It consists of the word 'explain' in a lowercase, sans-serif font, with a small speech bubble icon above the letter 'i'. The entire logo is contained within a white speech bubble shape with a drop shadow.

explain

Northumbrian Water Limited

NWL Acceptability and
Affordability Testing:
quantitative research -
topline report

Research report

August 2024

Notes on analysis

This quantitative survey was conducted in August 2024 and was designed to replicate the Affordability and Acceptability Testing that was conducted in 2023. In 2024 a decision was taken to conduct the survey with Household customers only, whereas in 2023 Non-household customers were also included. This report shows 'Overall' results for Northumbrian Water and Essex & Suffolk Water Household customers combined, from both 2023 and 2024, to enable direct comparison. A weighted average has been used to calculate these overall Household scores based on the number of customers served in the NW and ESW regions; 62% NW and 38% ESW. Overall results in the 2023 report also include Non-household customers and thus the results in this report will differ.



Results

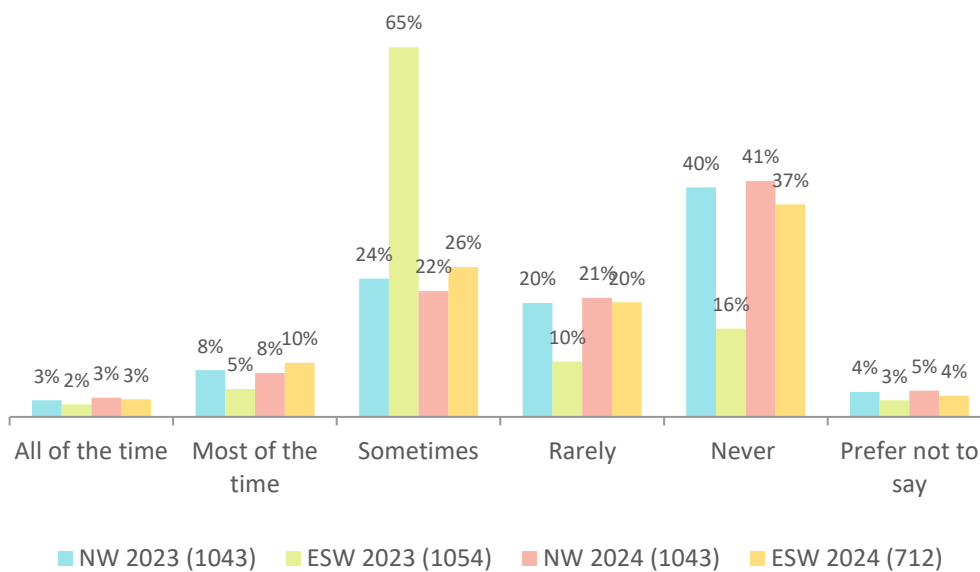
Affordability

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

Combined results for this question across NW and ESW are summarised below.

Survey response	2023	2024
All of the time	3%	3%
Most of the time	7%	9%
Sometimes	40%	24%
Rarely	16%	21%
Never	31%	39%
Prefer not to say	4%	5%

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

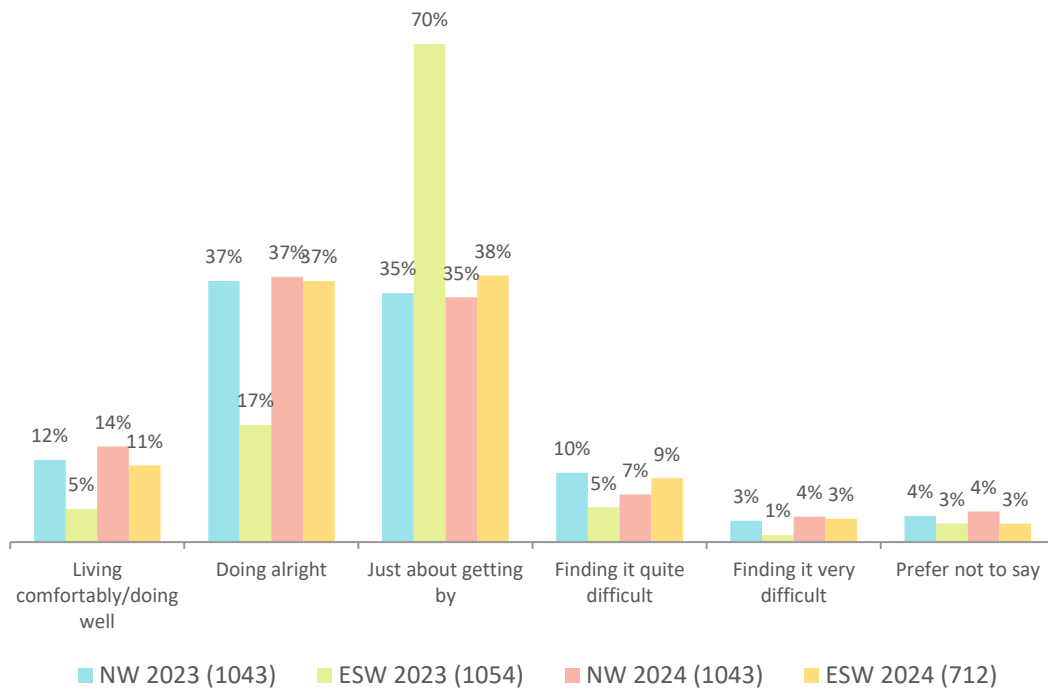


Q2. Overall, how well would you say you are managing financially now?

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

Survey response	2023	2024
Living comfortably/doing well	9%	13%
Doing alright	29%	37%
Just about getting by	48%	36%
Finding it quite difficult	8%	8%
Finding it very difficult	2%	4%
Prefer not to say	4%	4%

Q2. Overall, how well would you say you are managing financially now?

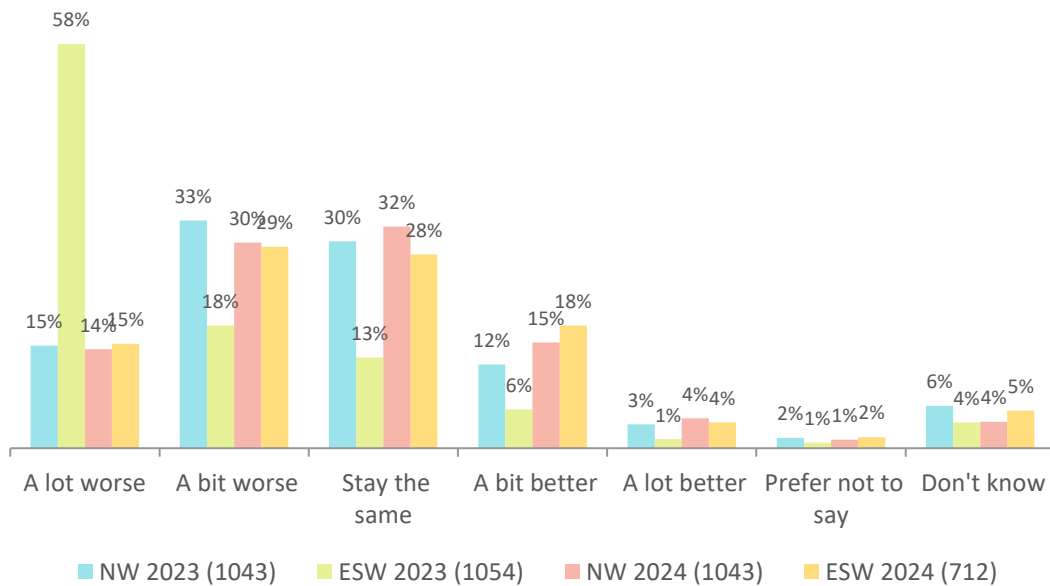


Q3. Thinking about your Household's financial situation over the next few years up to 2030, do you expect it to get: (a lot worse, a bit worse, stay the same, a bit better, a lot better)

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

Survey response	2023	2024
A lot worse	31%	14%
A bit worse	27%	30%
Stay the same	24%	30%
A bit better	10%	16%
A lot better	2%	4%
Prefer not to say	2%	1%
Don't know	5%	4%

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



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

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

Survey response	2023	2024
Easy	44%	35%
Neither easy nor difficult	40%	45%
Difficult	16%	19%
Don't know	1%	0%

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

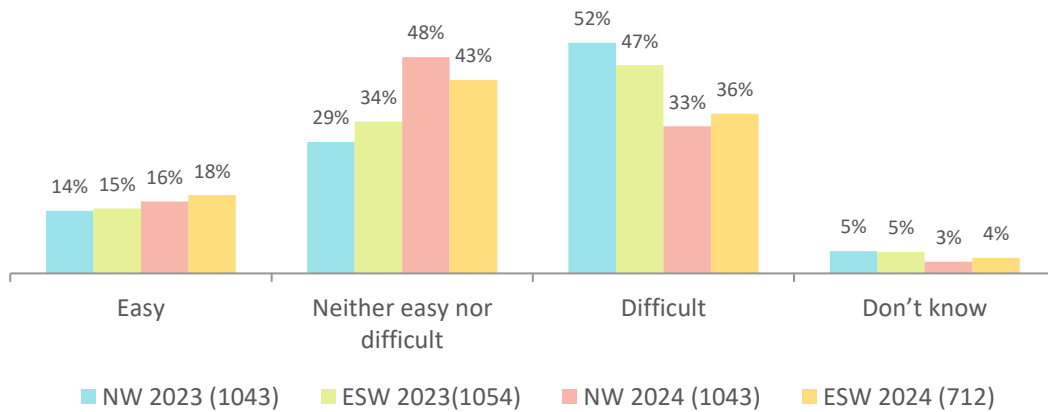


Q5. How easy or difficult do you think it would be for you to afford these water/water and sewerage/sewerage bills?

The table below shows the overall results for this question combining all responses to the survey.

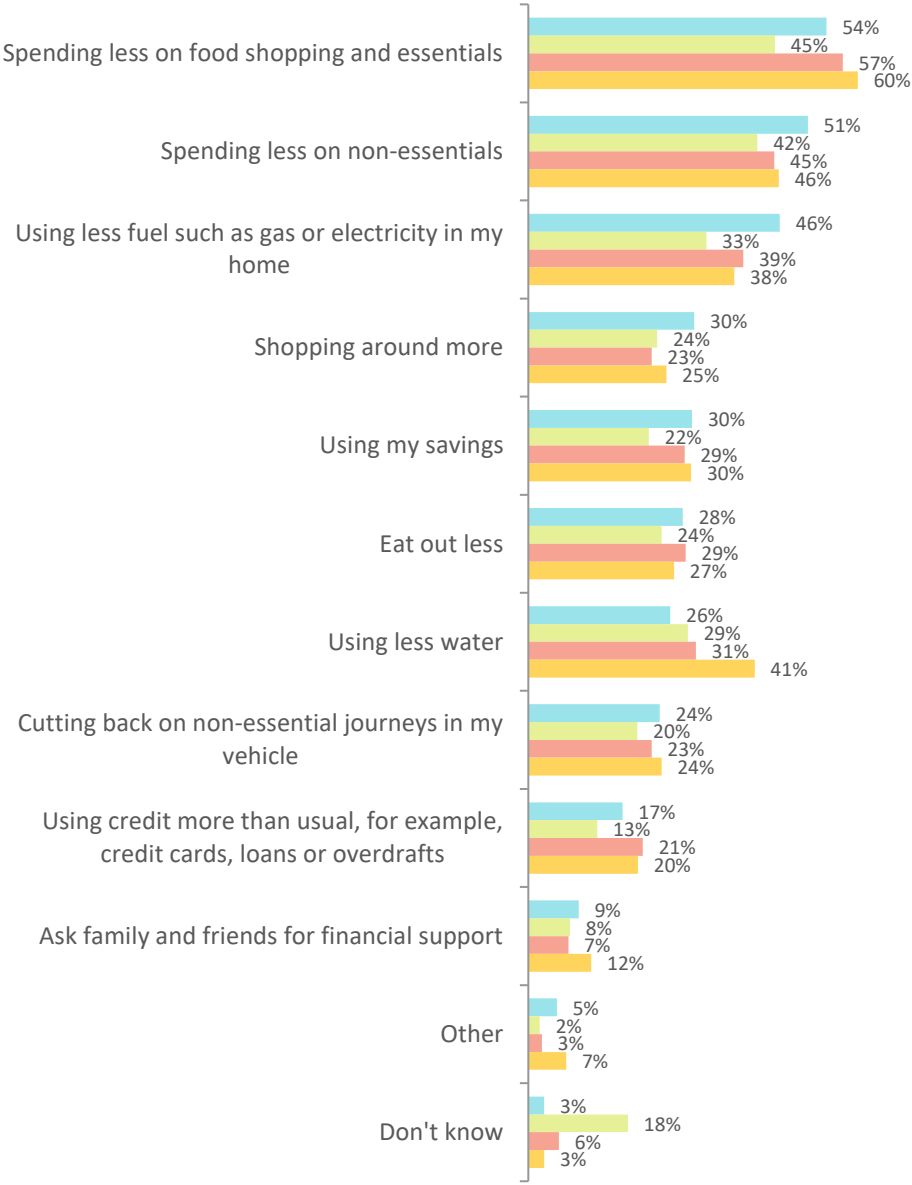
Survey response	2023	2024
Easy	14%	17%
Neither easy nor difficult	31%	46%
Difficult	50%	34%
Don't know	5%	3%

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



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

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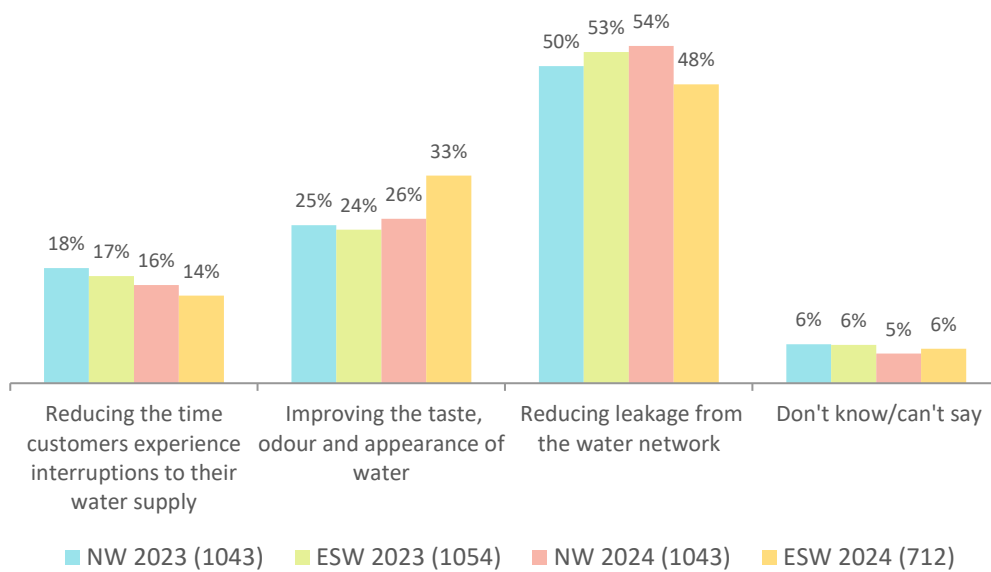
■ NW 2023 (538) ■ ESW 2023 (491) ■ NW 2024 (507) ■ ESW 2024 (309)



Acceptability

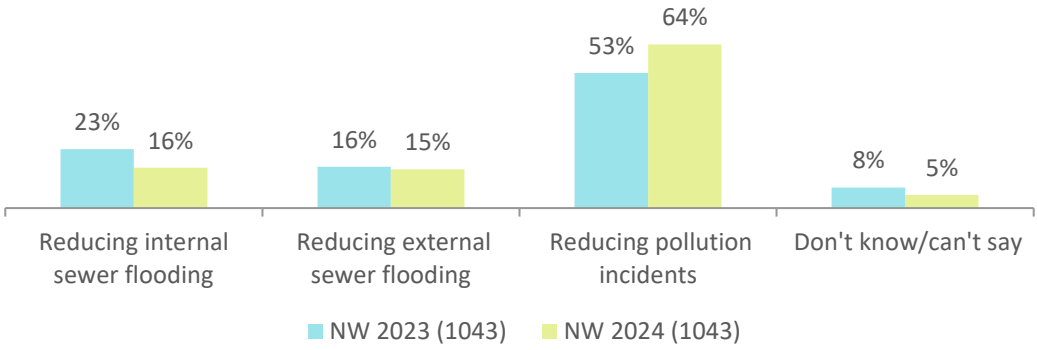
Q7a. Based on what you have just read, which of these three parts of the business plan is the most important to you?

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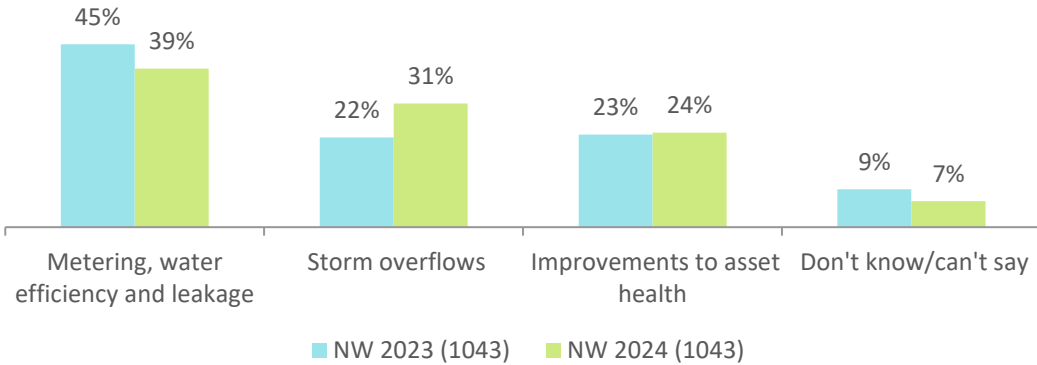
Q7b. Based on what you have just read, which of these three parts of the business plan is the most important to you?

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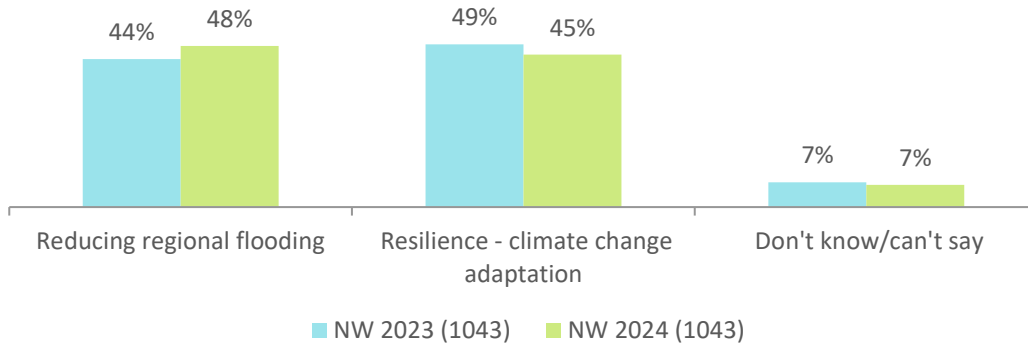
Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?

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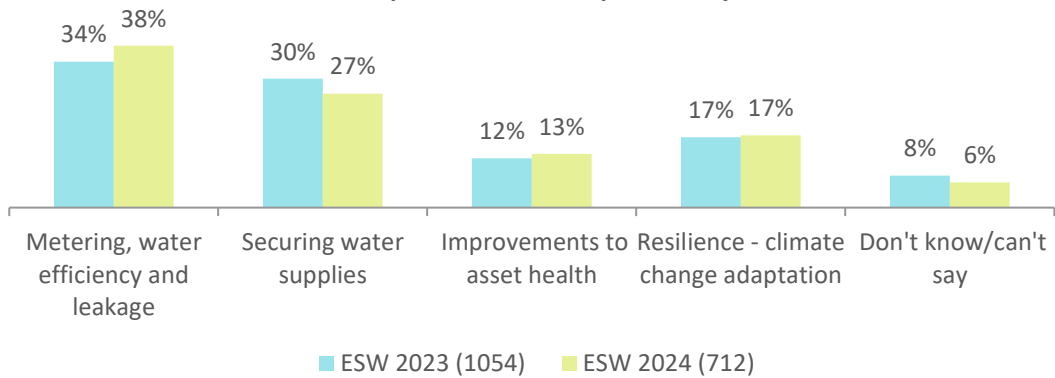
Q7d. Based on what you have just read, which of these two parts of the business plan is the most important to you?

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



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

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

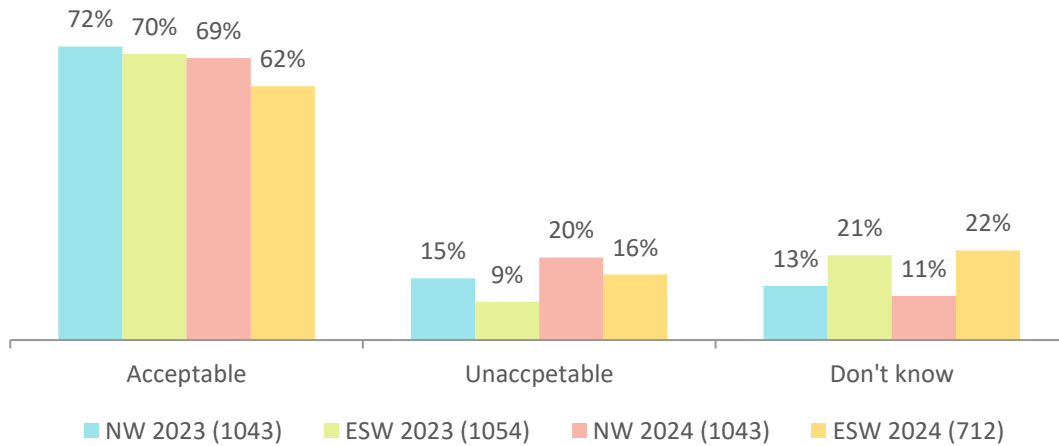


Q8a. Based on everything you have seen and read about Northumbrian Water's/Essex & Suffolk Water's proposed business plan, how acceptable or unacceptable is it to you?

Overall, the following levels of acceptance were achieved combining NW and ESW.

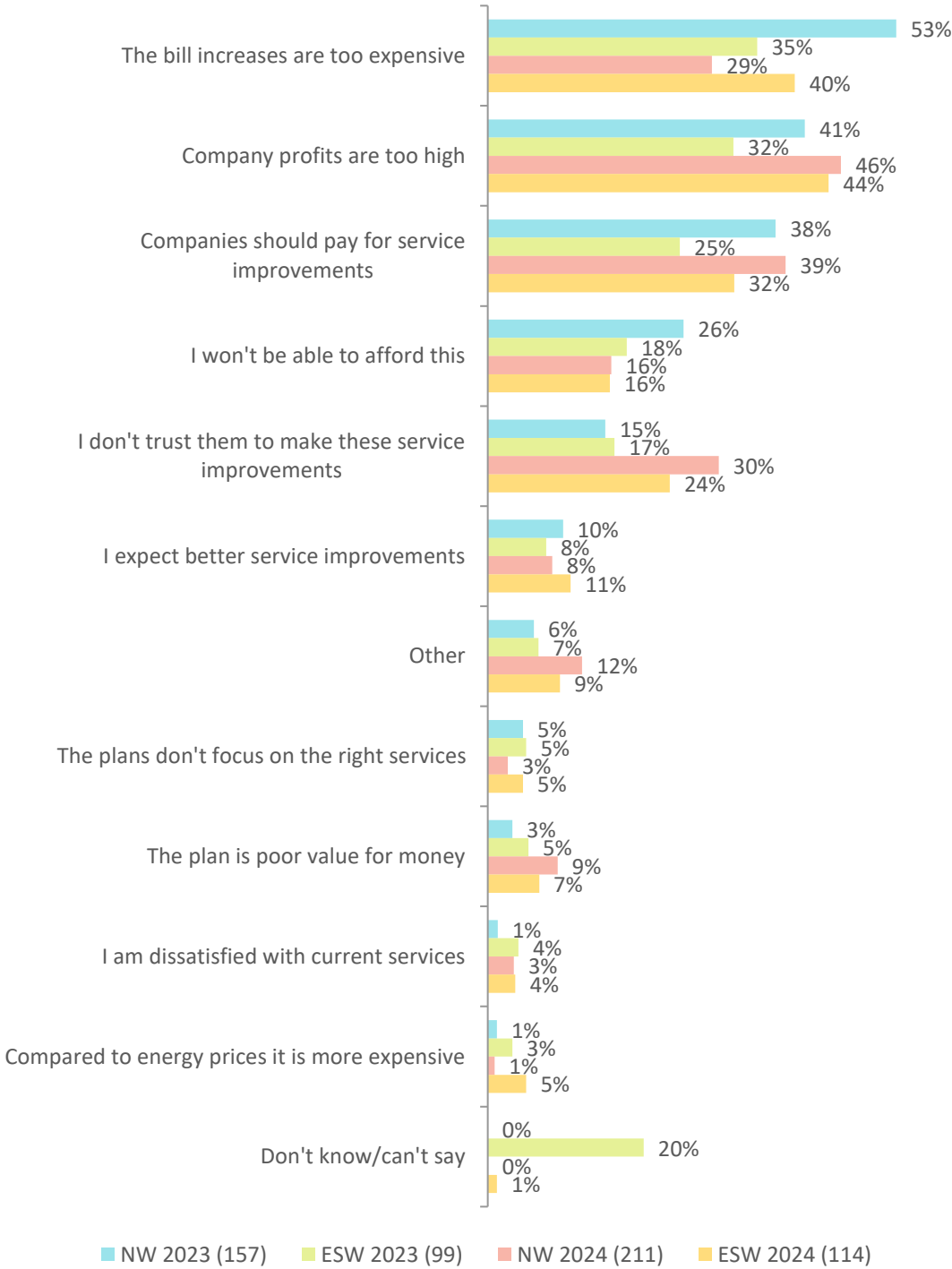
Survey response	2023	2024
Acceptable	71%	66%
Unacceptable	13%	18%
Don't know	16%	15%

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



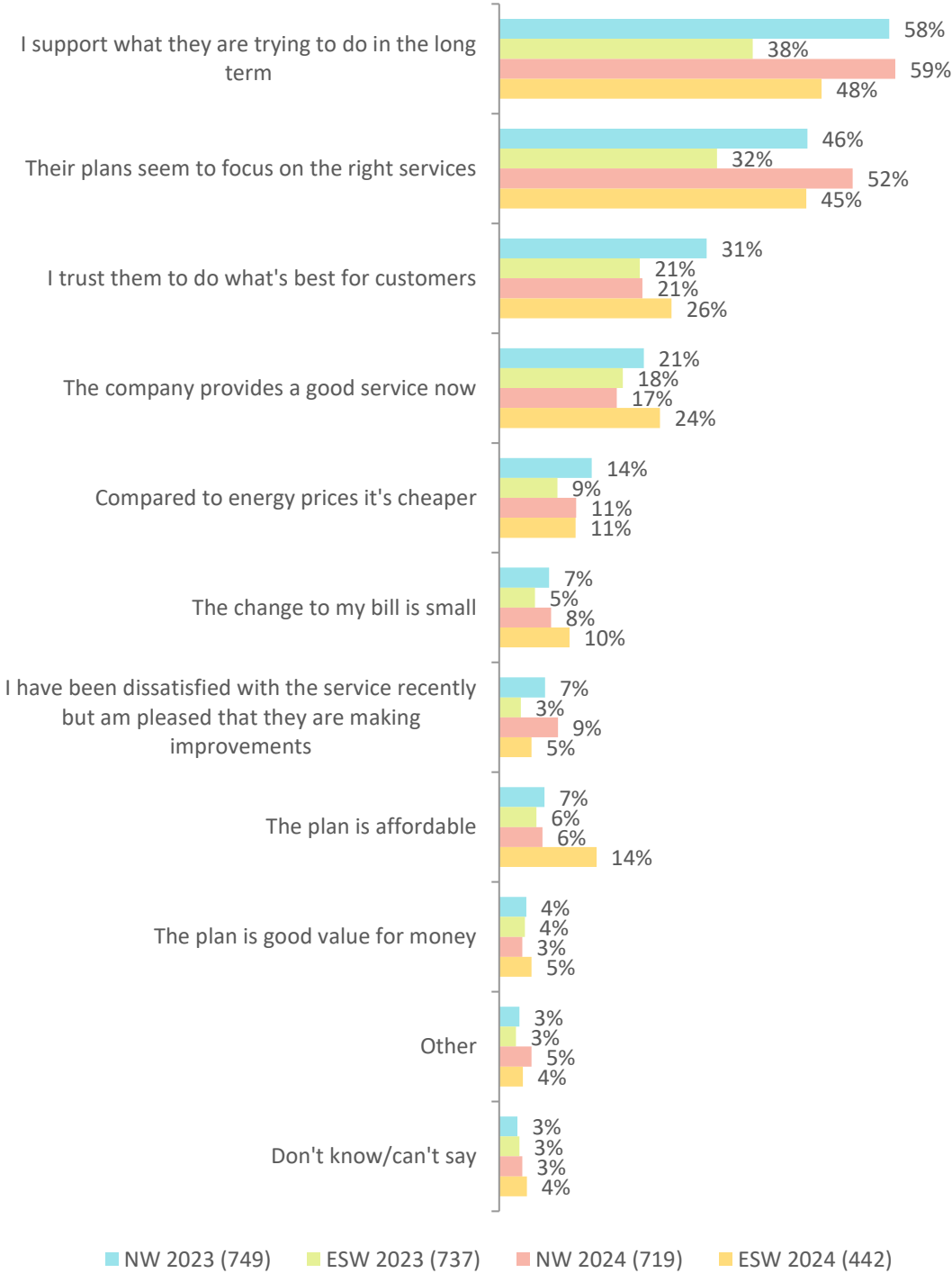
Q8b. What are the two main reasons that you feel the proposals for your water services are unacceptable?

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

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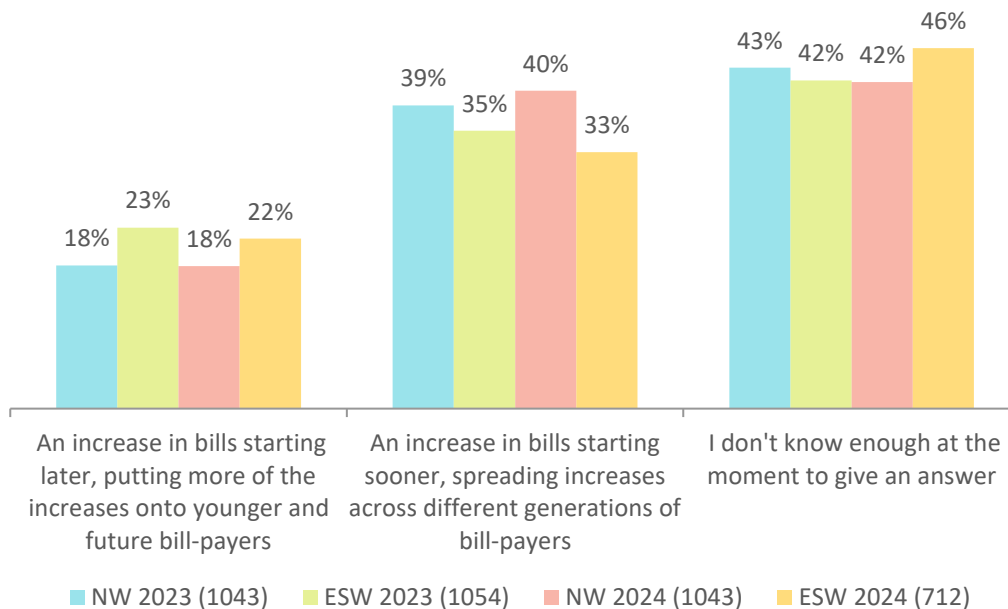


Q9. Long term investment by Northumbrian Water/Essex & Suffolk Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one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

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

Survey response	2023	2024
An increase in bills starting sooner, spreading increases across different generations of bill payers	37%	37%
An increase in bills starting later, putting more of the increases onto younger and future generations	20%	20%
I don't know enough at the moment to give an answer	43%	44%

Q9. Which one of the following options would you prefer?





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Final sign off: Rebecca Crinson