



Social Tariff research 2022

Final results

September 2022

Conducted by Verve



Background, objectives and methodology

Background

Thames Water recognise that the current cost of living crisis will have a serious impact on the affordability of household bills, causing concern for many customers.

In 2018 research conducted found that customers were happy to pay an additional £11 a year (before inflation) to cross-subsidise up to 300,000 customers on the discounted tariff.

This agreed level and take-up of cross subsidy was meant to take Thames Water to the end of the current planning cycle – 2025. However with the current cost of living crisis it's estimated that the tariff will be taken by all 300,000 customers by 2023, and a further 175,000 customers are estimated to need to take the tariff by 2025. This means that support for an increase to the cross-subsidy needs to be re-assessed amongst both eligible customers and those who will subsidise the tariff.

Project objectives

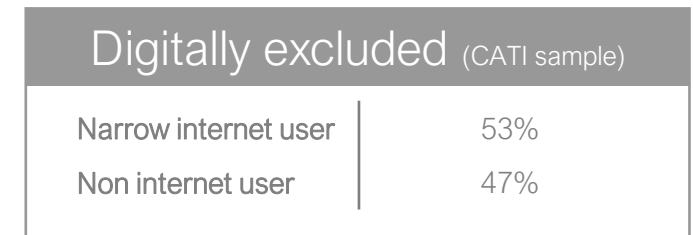
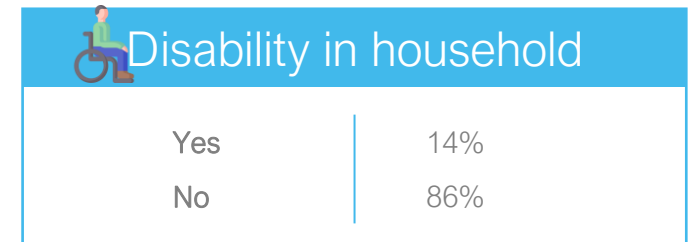
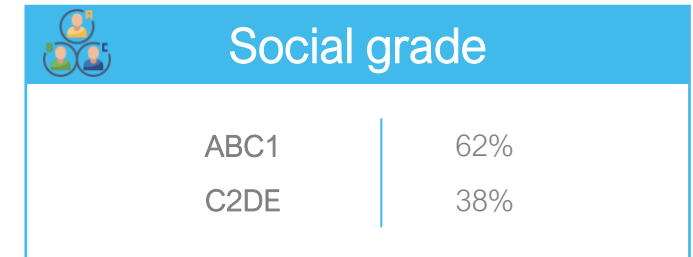
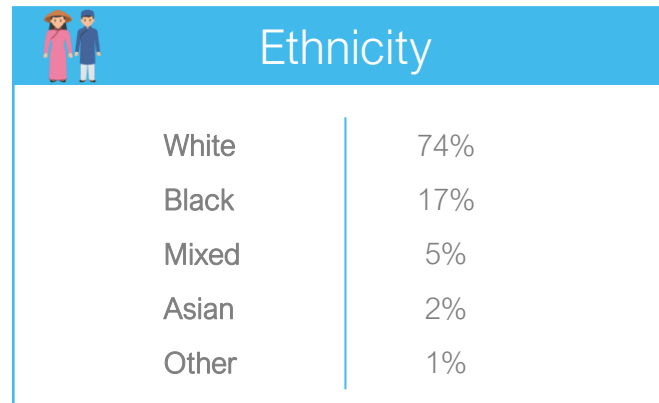
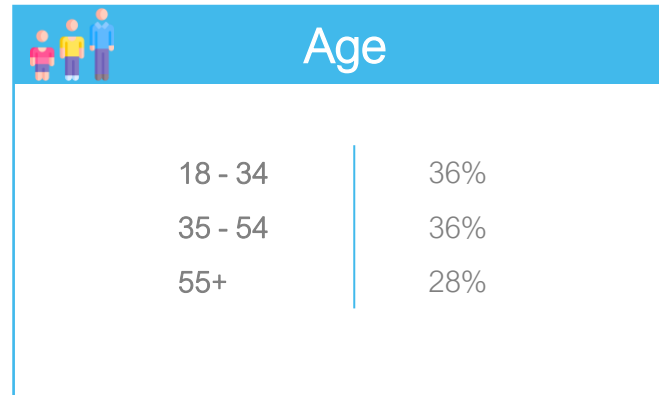
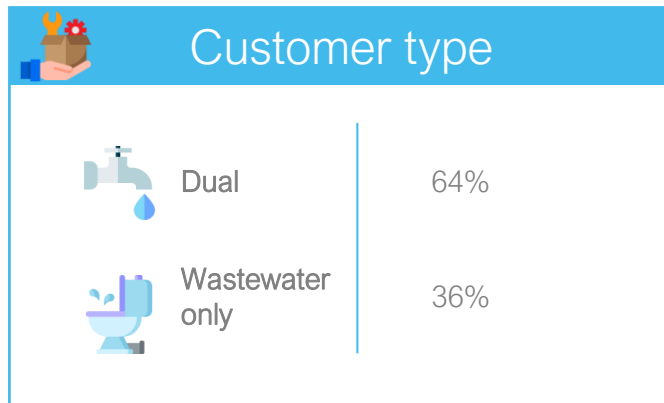
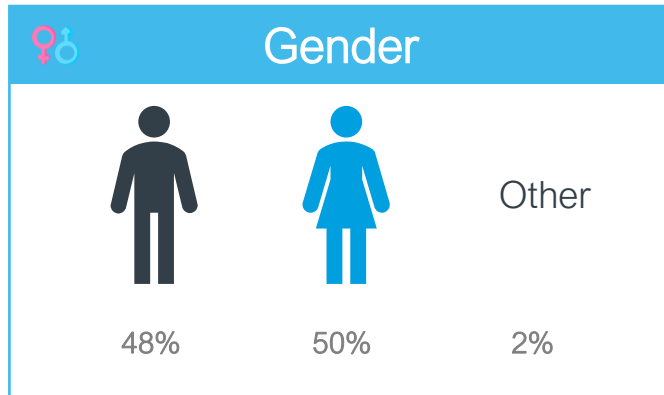
- The business objective is to gather evidence of customer support for extending the social tariff for more customers to 2025.
- The research objective is to determine the level of additional cross-subsidy supported by customers to 2025.

Methodology

Verve conducted a mixed methodology approach of online and telephone interviews to ensure that the views of offline customers were included.

- A total of 1,100 interviews were achieved, recruited through Obsurvant; 1,000 online from 1 to 8 August 2022 and 100 telephone (CATI) from 1 August to 2 September 2022.
- Online survey quotas were placed on gender, age, service type, social group, ethnicity and disability.
- For the offline survey respondents were screened to ensure the sample meet the criteria for 'digital exclusion': non internet users and 'narrow' internet users (defined by Ofcom as those who've only ever undertaken 1 to 4 of 13 key online activities).
- The data from the online and telephone surveys was combined and weighted post-fieldwork to be representative of the overall Thames Water customer base.
- Net acceptance of a cross-subsidy is based on those answering: strongly support, somewhat support and don't mind.

Respondent profile



1,100 completed interviews;
1000 online, 100 telephone

In order to be representative of Thames Water's customer base, the combined online + CATI sample has been weighted at a total level in terms of age, gender, service type, ethnicity, social grade and disability.

Methodology detail

The questionnaire followed a similar structure to the 2018 survey.

Information was provided on:

- Thames Water's current and proposed discounted rate
- Who would be eligible
- How the rate would be funded, and the current cross-subsidy
- Other schemes Thames Water runs to help customers who struggle to pay

Informed if likely or not to qualify for the discounted tariff

Information on the number of low income customers who may need financial support

Willingness to support or oppose the extension to the discounted rate was tested at 4 possible different price points representing a different number of additional customers who will be helped:

Annual cross subsidy (also expressed as monthly)	Helping 175,000 additional customers struggling to pay	Helping 150,000 additional customers struggling to pay	Helping 100,000 additional customers struggling to pay	Helping 50,000 additional customers struggling to pay
Dual customers	£9.97 (83p)	£8.54 (71p)	£5.70 (47p)	£2.85 (24p)
Wastewater only customers	£4.07 (34p)	£3.49 (29p)	£2.33 (19p)	£1.16 (10p)

Information shown to respondents prior to completing the price acceptability questions (1)

Screen 1

Thames Water offer a discounted rate to help its most disadvantaged households by reducing their water bills. All Water Companies in England and Wales offer similar schemes:

The discounted rate is for those who have a gross household income below £16,480 in the Thames Valley and Home Counties, or below £20,111 for those within Greater London.

These low-income customers receive a 50% discount on their bill.

Screen 2

- The discounted rate is funded by adding a small amount to the bills of all customers. This is known as a cross-subsidy.
- Thames Water does not financially profit at all from this cross-subsidy and 100% of the contributions are passed directly on to help customers in financial difficulty.
- Thames Water customers currently pay £1 per month (£12 per year) [dual customers] / 50p per month (£6 per year) [waste only customers] on top of their bills in order to provide a discounted rate for low income customers.
- The discounts have become even more important as a result of the Cost of Living Crisis.

Information shown to respondents prior to completing the price acceptability questions (2)

Screen 3

The discounted rate forms part of a range of support that Thames Water provide to help customers who struggle to pay their water and wastewater bill. Others are:

- A capped rate, so that some metered households won't pay more than the average household if they meet certain criteria of benefits, family size or medical conditions. This capped rate is cross-subsidised by the bills of other customers (around £1 per year).
- Providing and fitting water meters (free of charge) which encourage water saving, leading to lower bills.
- A Customer Assistance Fund, funded by Thames Water, which matches customer debt payments to clear water arrears.
- A charitable Trust Fund, funded by Thames Water's shareholders, which provides one-off grants to customers in extreme poverty for essential household items like bedding and washing machines and is the largest non-governmental provider of grants to debt advice agencies in our region.
- Offering free 'Smarter Home Visits' to advise customers on how to get the above benefits, and providing water saving advice, leading to lower bills.

Screen 4

By 2023 Thames Water will be helping over 300,000 households with the discounted rate. However, taking account of the current Cost of Living Crisis, Thames Water believe that over 475,000 low income customers will be in need of financial support and would qualify for the discounted rate, and it would like to help these additional 175,000 customers by 2025.

Bearing in mind the information you have seen you will now be asked some questions about your willingness to support the discounted rate through your Thames Water bill in 2023-2025 and beyond.

The costs mentioned EXCLUDE inflation and they represent the ADDITION to your bill to help the additional 175,000 households.

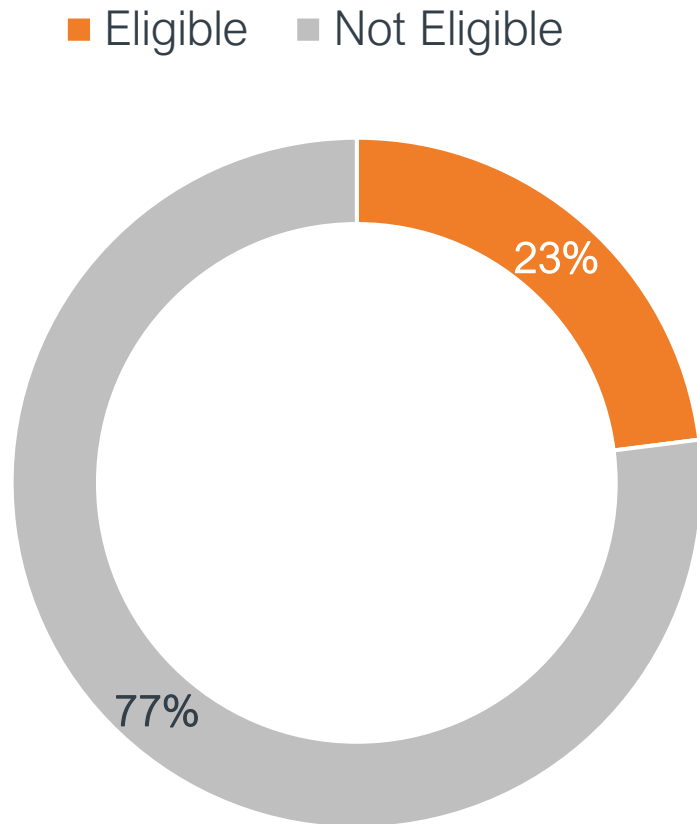
Key findings

- There is strong support for additional cross-subsidisation of the discounted tariff:
 - 75% of dual customers are not opposed to the discounted rate at the highest charge of £9.97 per year
 - 75% of wastewater only customers are not opposed to the highest charge of £4.07 per year
- Awareness of Thames Water giving support to customers has significantly increased from the 2018 study, with 46% aware now compared to 34% previously
 - While most still do not know *a lot* about the program, there are improvements here as well; 18% now know *a lot or quite a lot* about the program, as opposed to the 2018 reading of 7%
- Including the information with the bill statement, emails and leafletting are the most effective ways to communicate the discounted rate, particularly for those eligible

Knowledge and awareness of social tariffs

Likely to qualify for social tariff

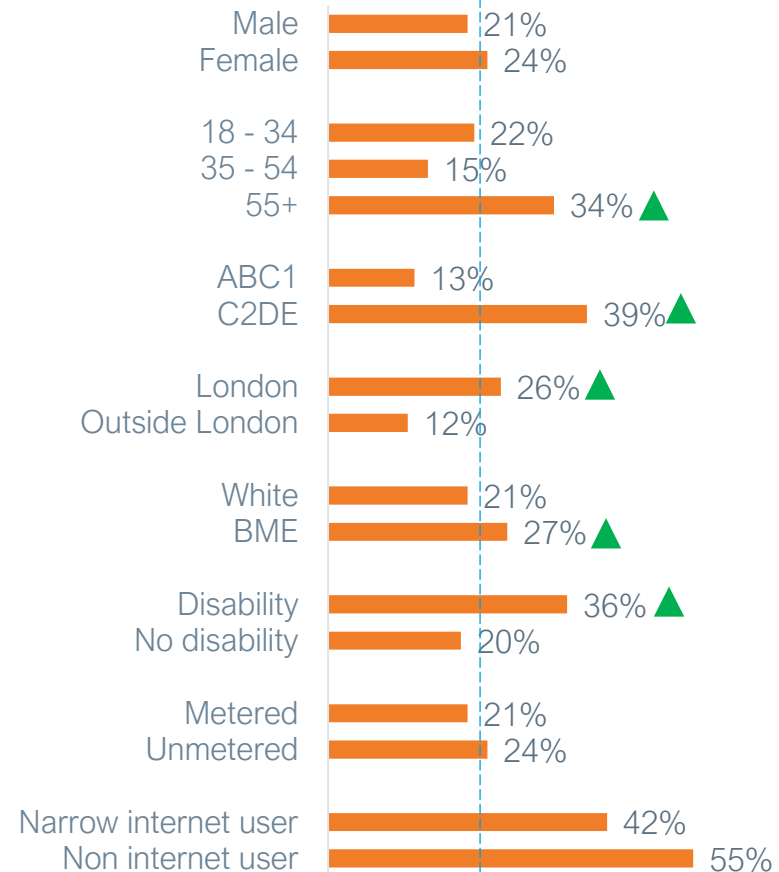
More than 1 in 5 qualify for a social tariff (a significant increase from 11% in 2018). Likelihood to qualify is significantly higher among 55+, C2DEs, BME customers, those in London, those with a disability and narrow/non internet users.



Excludes respondents who preferred not to disclose their income (online: n=10, telephone: n=41)

NET: Eligible by sub-group

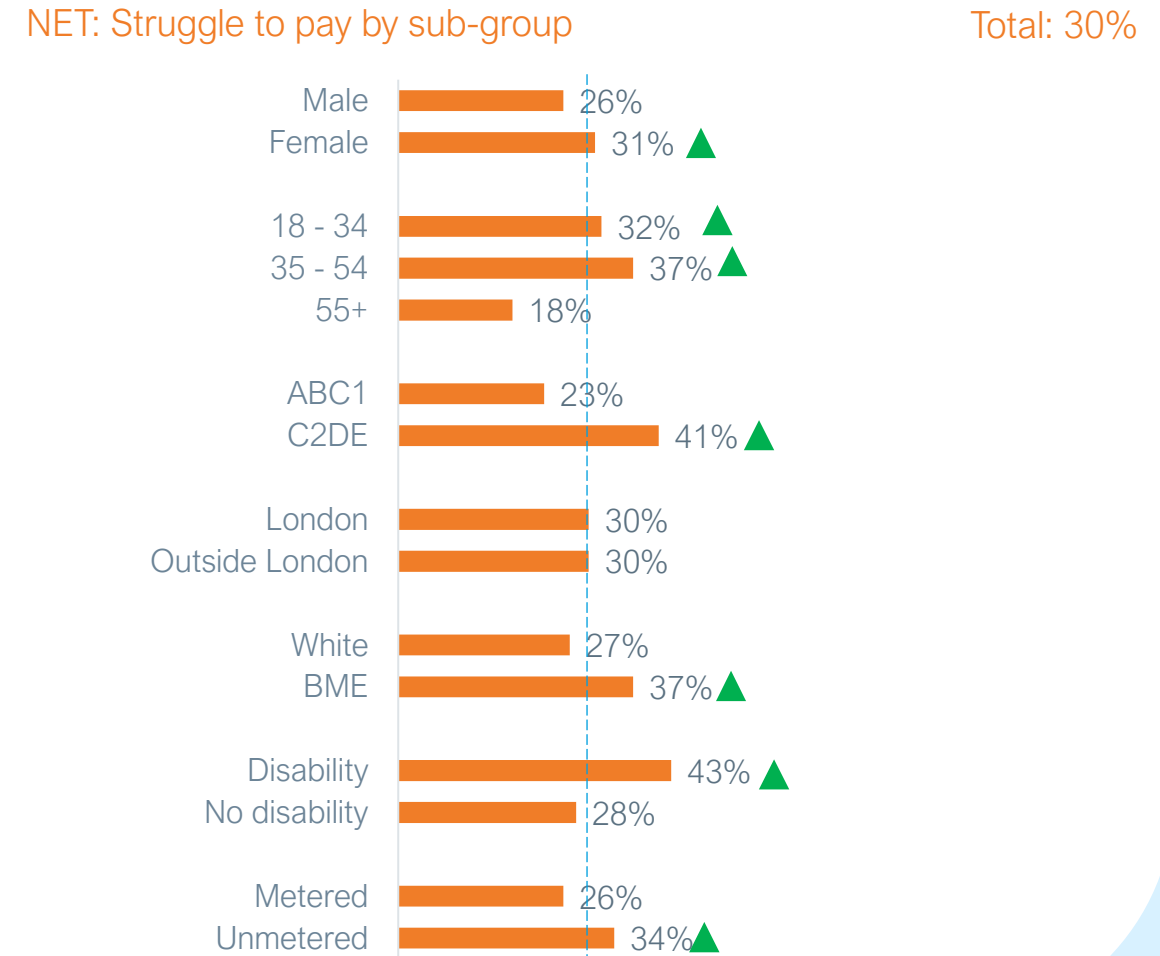
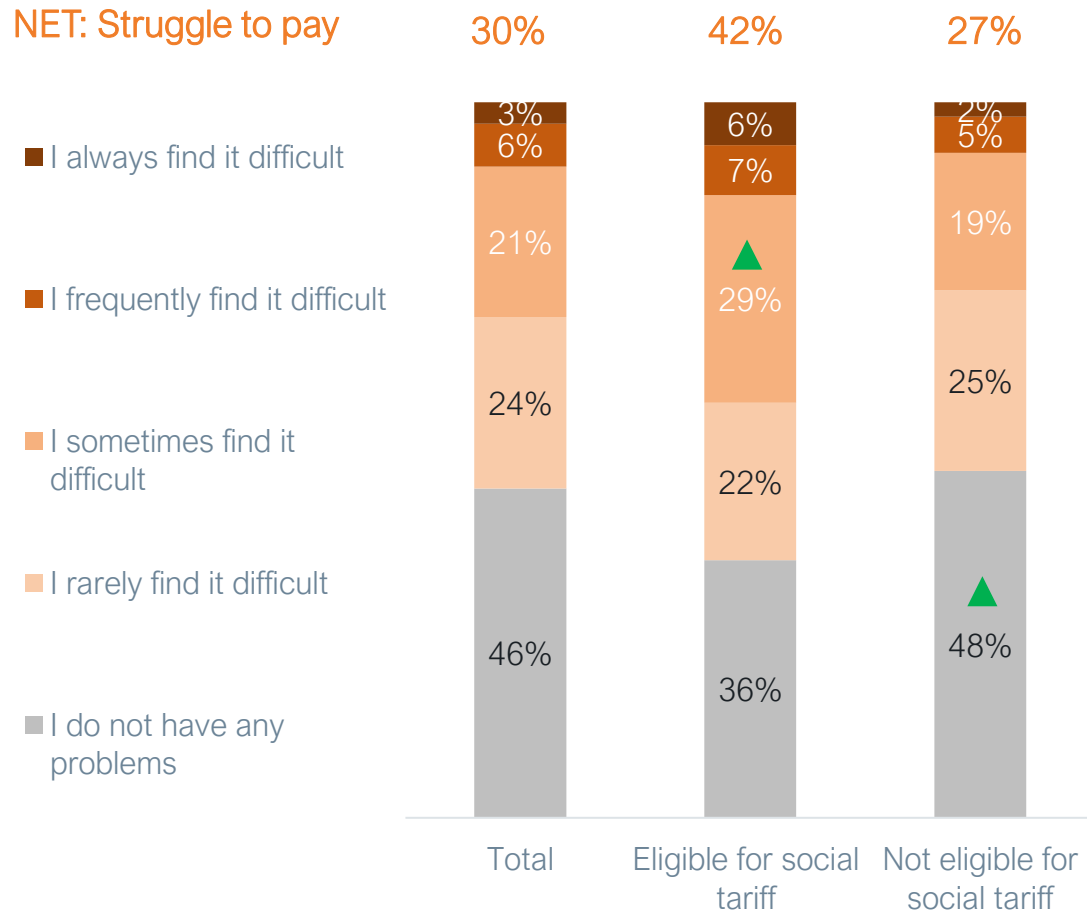
Total: 23%



Triangle: Significant difference at 95% conf. level.

Ability to pay water bill

3 in 10 customers struggle to pay their water bill (up from 21% in 2018). This is significantly higher among women, under 55s, C2DEs, BME, those with a disability and unmetered customers.



Social Tariffs, Quantitative Survey, August-September 2022.

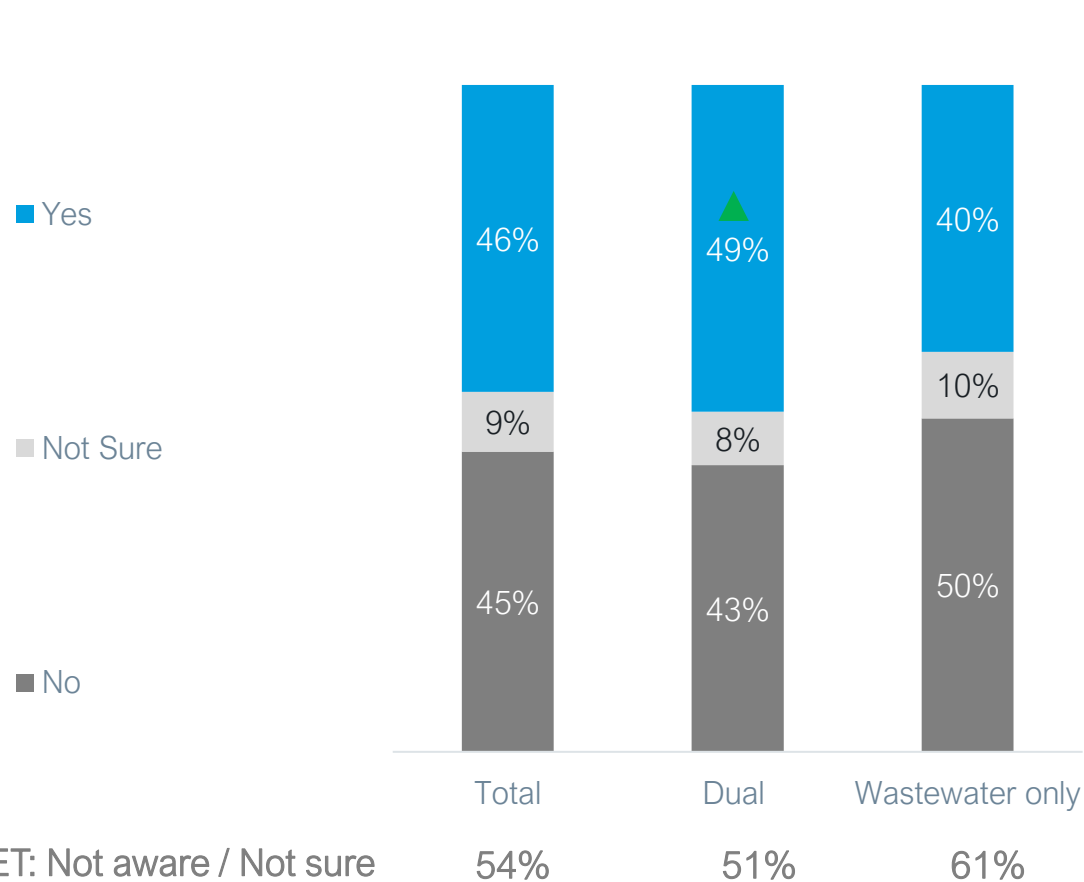
Q21. Which of the following statements best describes how easy or difficult you find it to pay your water and wastewater bill each month?

Base: All respondents (n=1110), Eligible for social tariff (n=254), Not eligible for social tariff (n=795), Prefer not to say at income (n=51)

▲ ▼ Triangle: Significant difference at 95% conf. level.

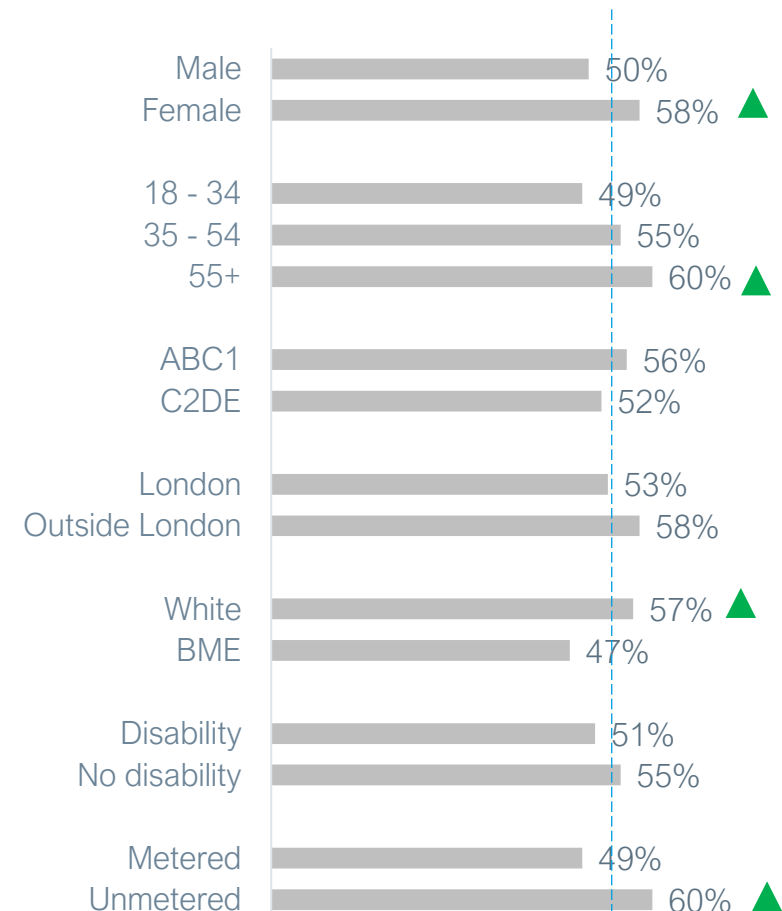
Awareness of Thames Water giving support

Awareness of Thames Water giving support to financially vulnerable customers has risen to 46%, from 34% in 2018. Wastewater only customers remain less aware compared to Dual customers.



NET: Not aware/ Not sure by sub-group

Total: 54%

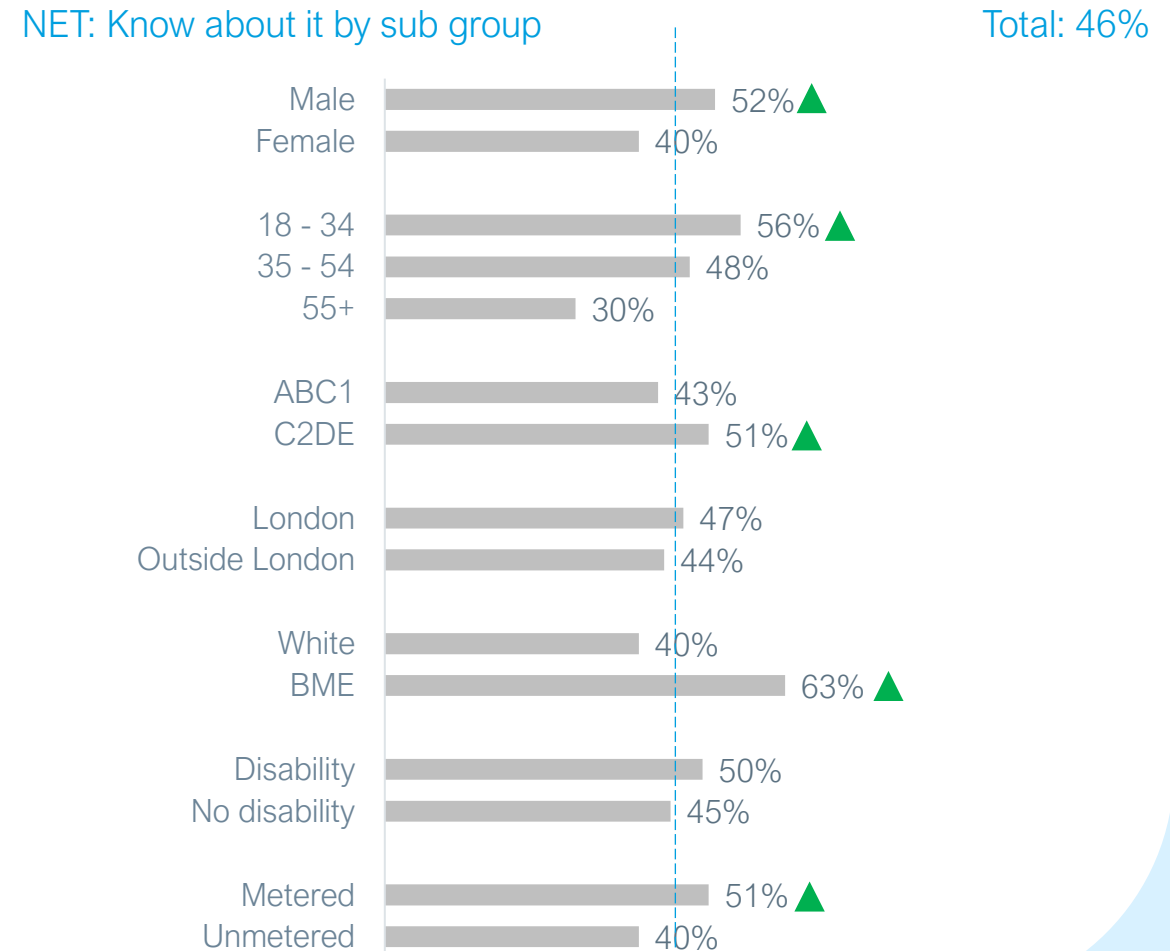
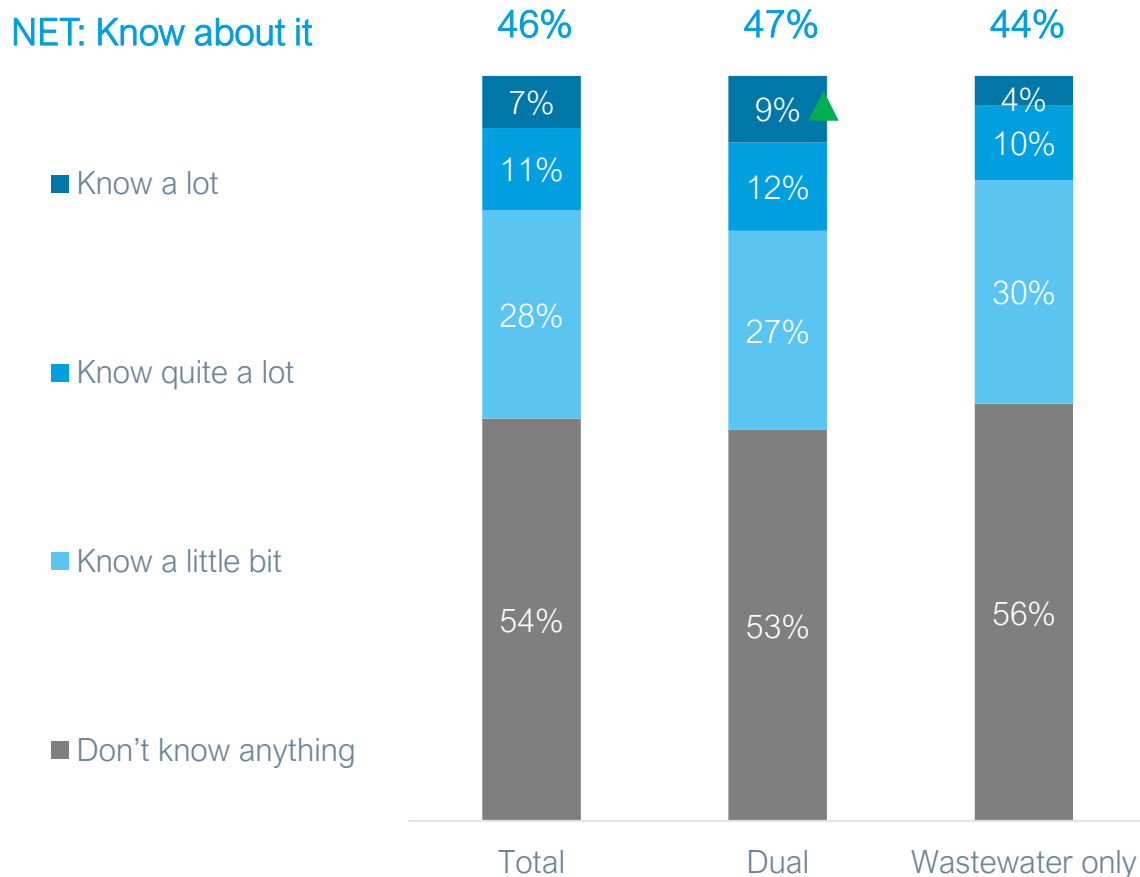


▲ ▼ Triangle: Significant difference at 95% conf. level.

Social Tariffs, Quantitative Survey, August-September 2022.
 Q14. Are you aware that Thames Water give support to customers who are financially vulnerable? (i.e. on a low income, or in financial difficulties and struggling to afford their water bill)
 Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

Knowledge of current discounted rate

Close to half know about the current discounted rate, however only a few know *a lot* about it. Knowledge of the discounted rate has improved from 2018 when 68% *Didn't know anything* at all, decreasing to 54% in 2022.

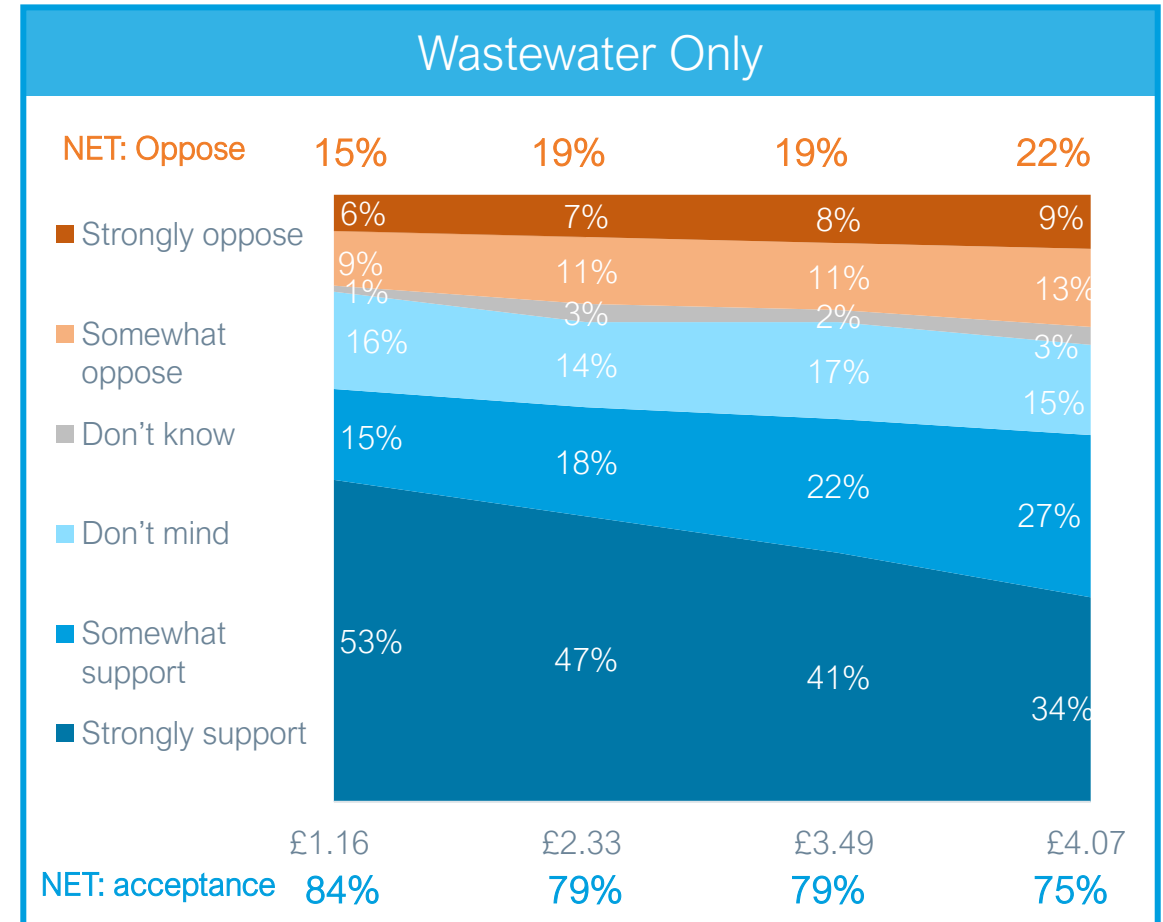
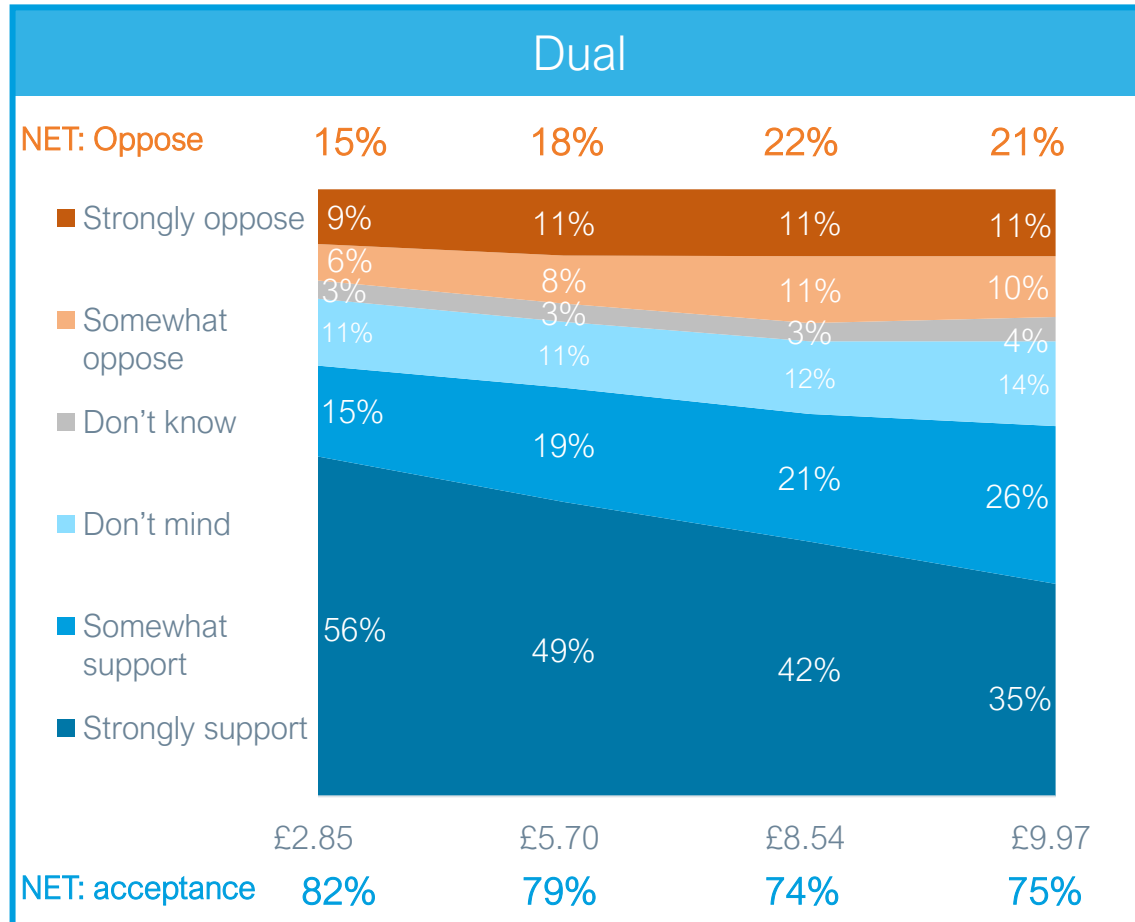


Social Tariffs, Quantitative Survey, August-September 2022.
 Q15a. Thames Water has a discounted rate to help customers in financial difficulties. How much do you know about this?
 Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

Acceptance of cross
subsidy for social
tariffs

Acceptance of cross subsidy: Dual vs. Wastewater Only

75% of dual customers do not oppose the highest charge of £9.97. Similarly, 75% of wastewater only customers do not oppose paying the highest charge of £4.07 extra per year.



Social Tariffs, Quantitative Survey, August-September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

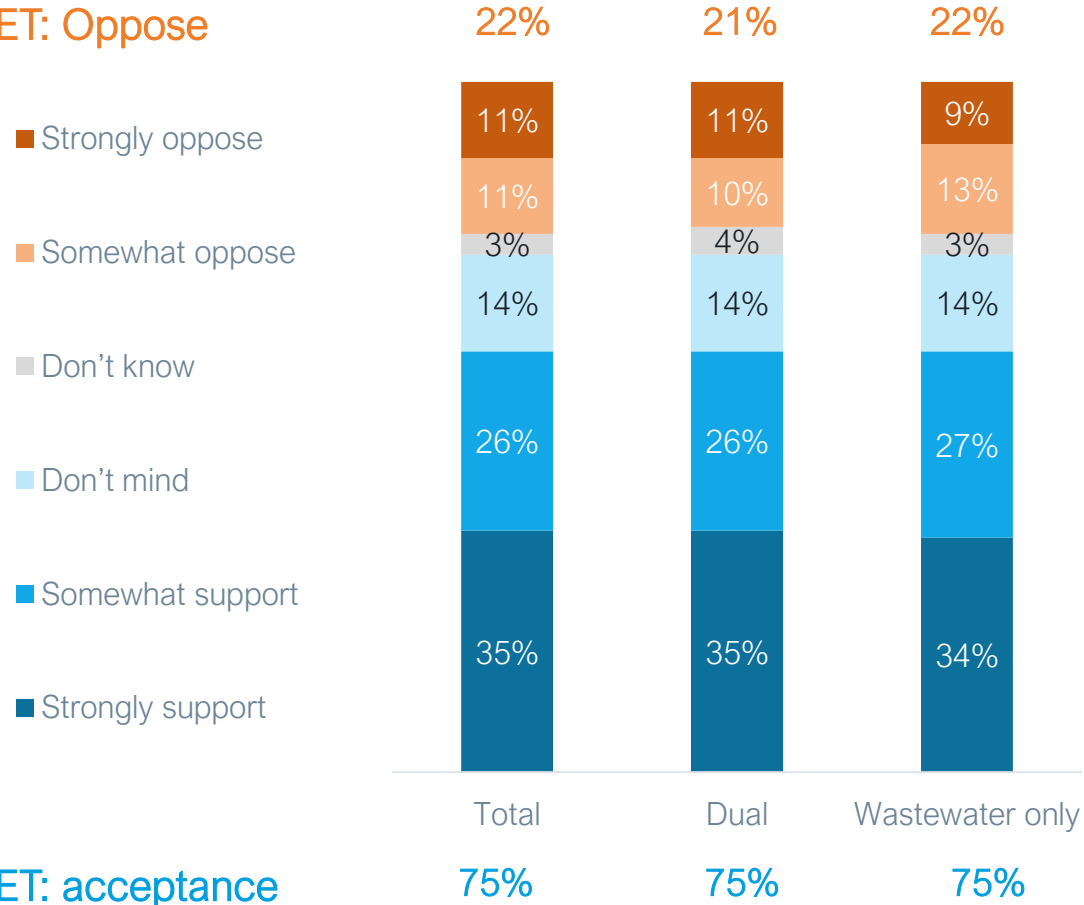
*Acceptance is the NET of strongly support, somewhat support and don't mind

In principle support for the concept of a discounted rate

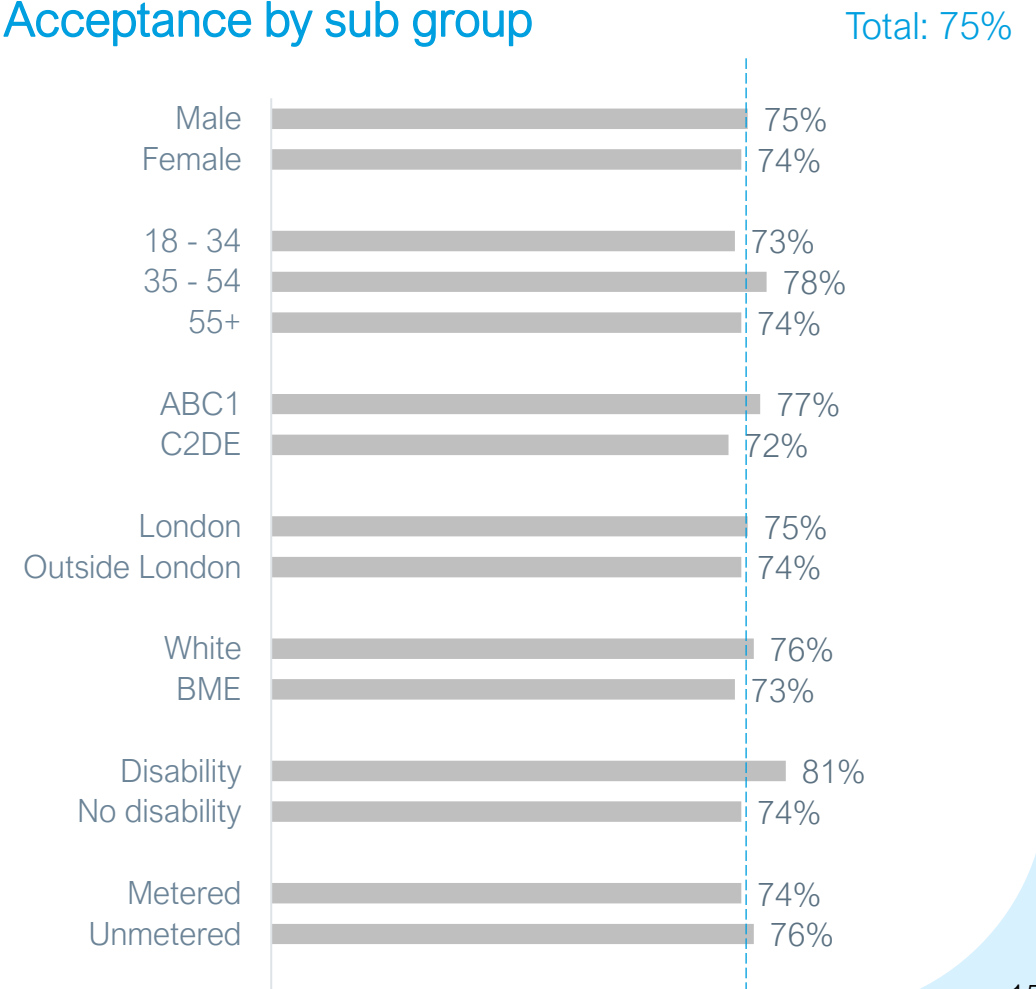
Dual: £9.97 per year, Wastewater only: £4.07 per year

Dual customers: 83p per month (£9.97 per year) / Wastewater only customers: 34p per month (£4.07 per year)

NET: Oppose



NET: Acceptance by sub group



Social Tariffs, Quantitative Survey, August-September 2022.

Q15 - How far would you support or oppose a discounted rate which would help 175,000 additional households who are struggling to pay water & wastewater bills.

All customers would pay up to an additional 83p per month (£9.97 per year) / 34p per month (£4.07 per year) towards helping these low-income customers

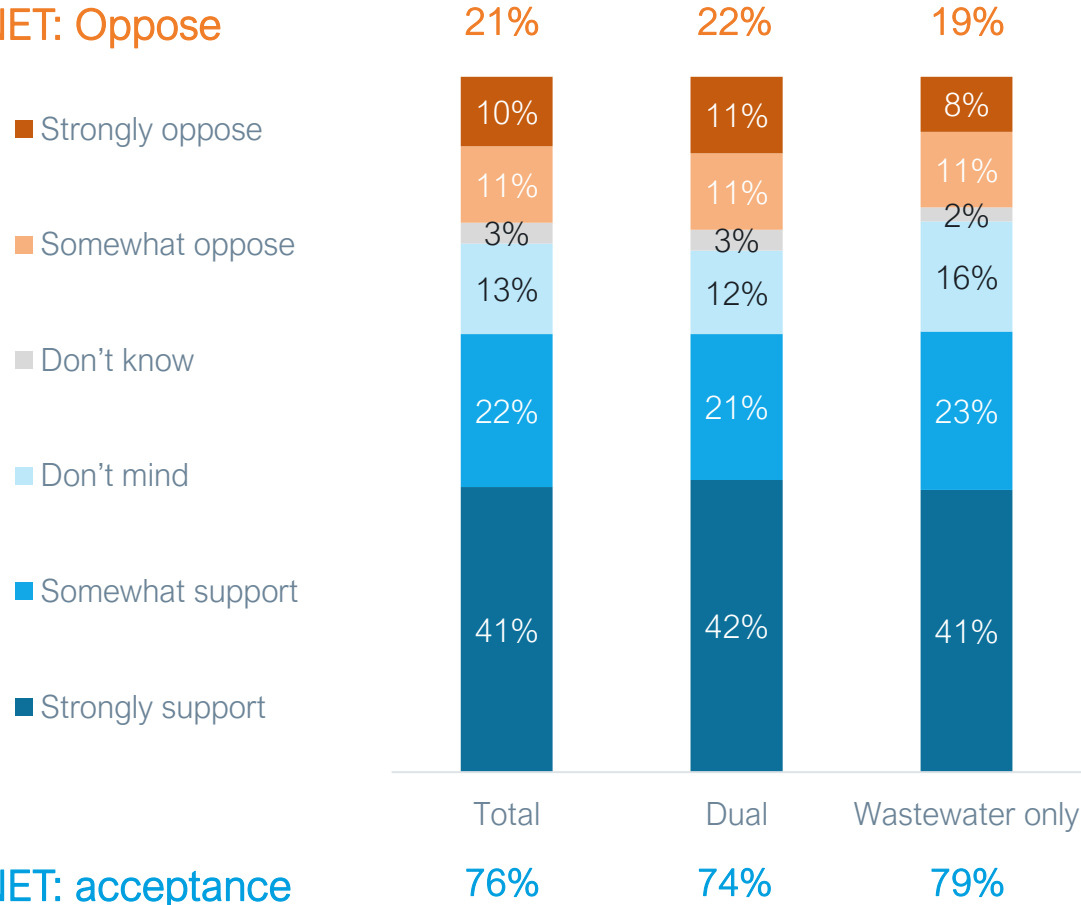
Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

In principle support for the concept of a discounted rate

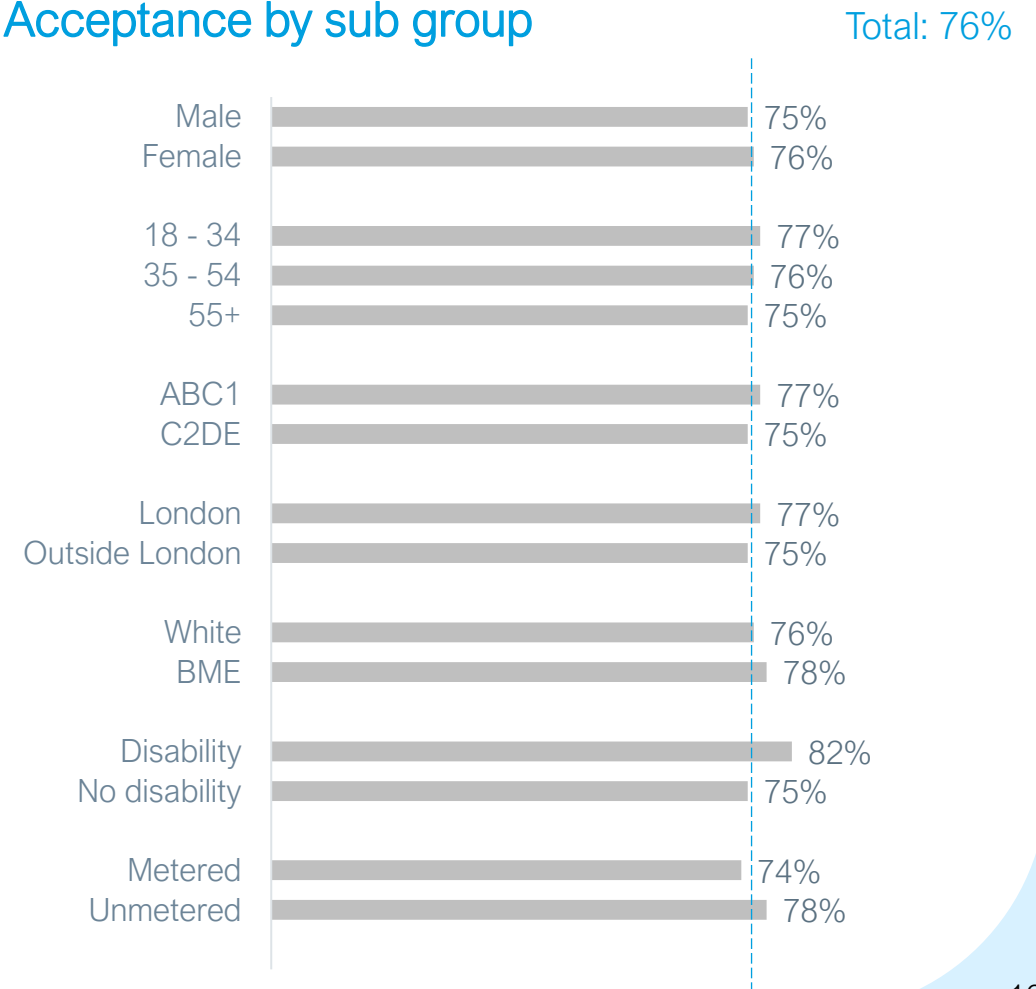
Dual: £8.54 per year, Wastewater only: £3.49 per year

Dual customers: 71p per month (£8.54 per year) / Wastewater only customers: 29p per month (£3.49 per year)

NET: Oppose



NET: Acceptance by sub group



Social Tariffs, Quantitative Survey, August-September 2022.

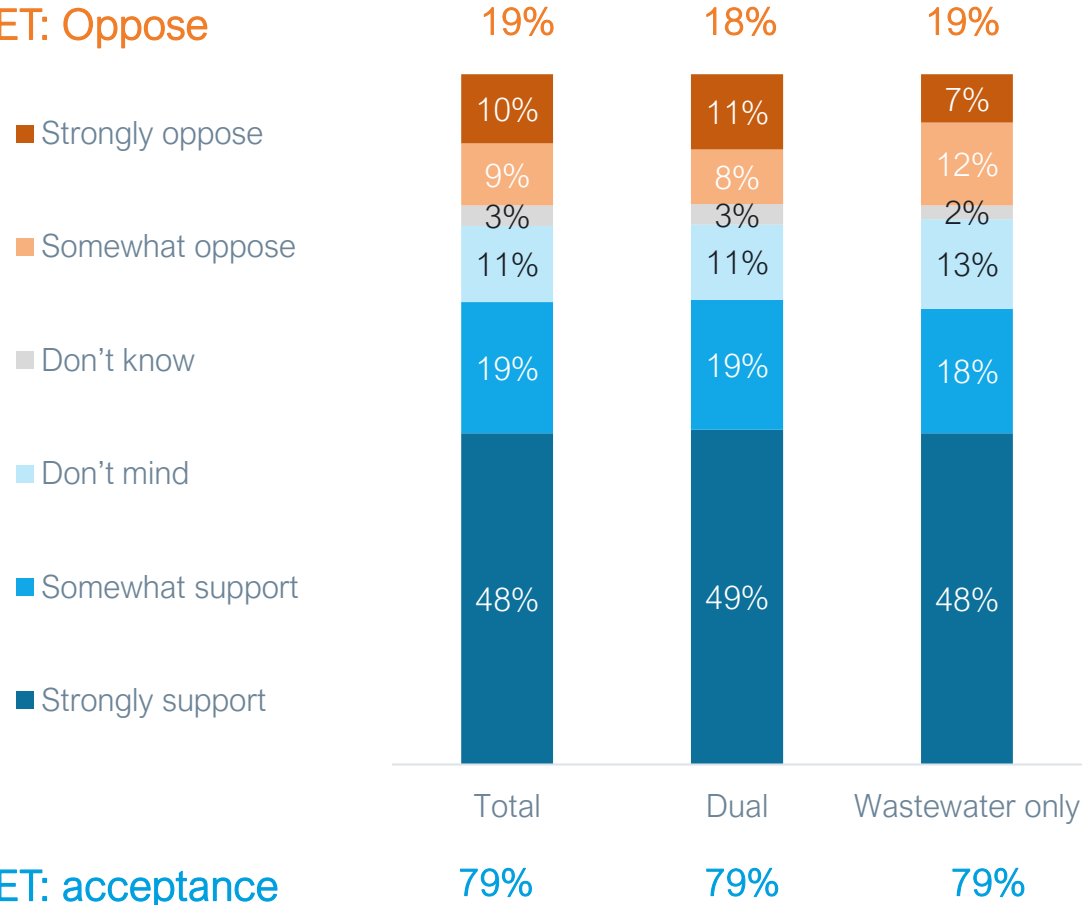
Q16 - How far would you support or oppose a discounted rate which would help 150,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 71p per month (£8.54 per year) / 29p per month (£3.49 per year) towards helping these low-income customers
 Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

In principle support for the concept of a discounted rate

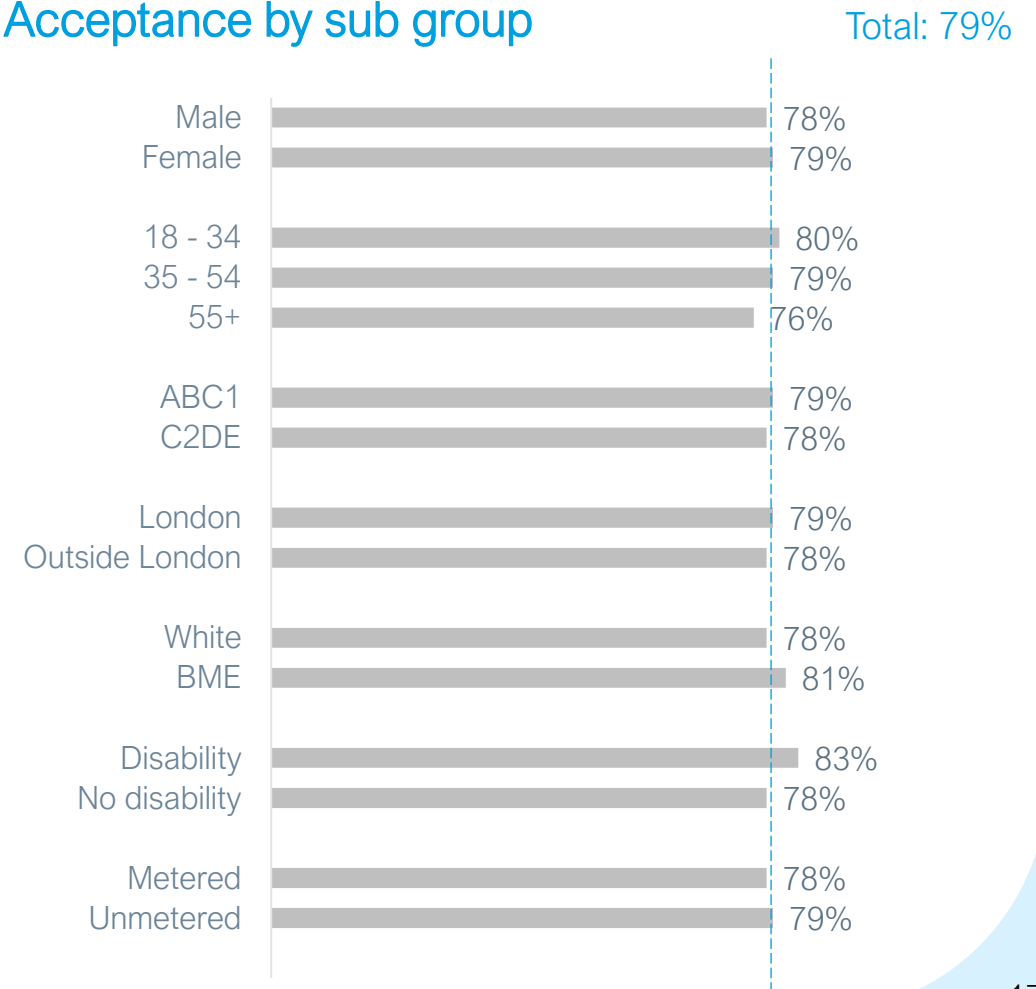
Dual: £5.70 per year, Wastewater only: £2.33 per year

Dual customers: 47p per month (£5.70 per year) / Wastewater only customers: 19p per month (£2.33 per year)

NET: Oppose



NET: Acceptance by sub group



Social Tariffs, Quantitative Survey, August to September 2022.

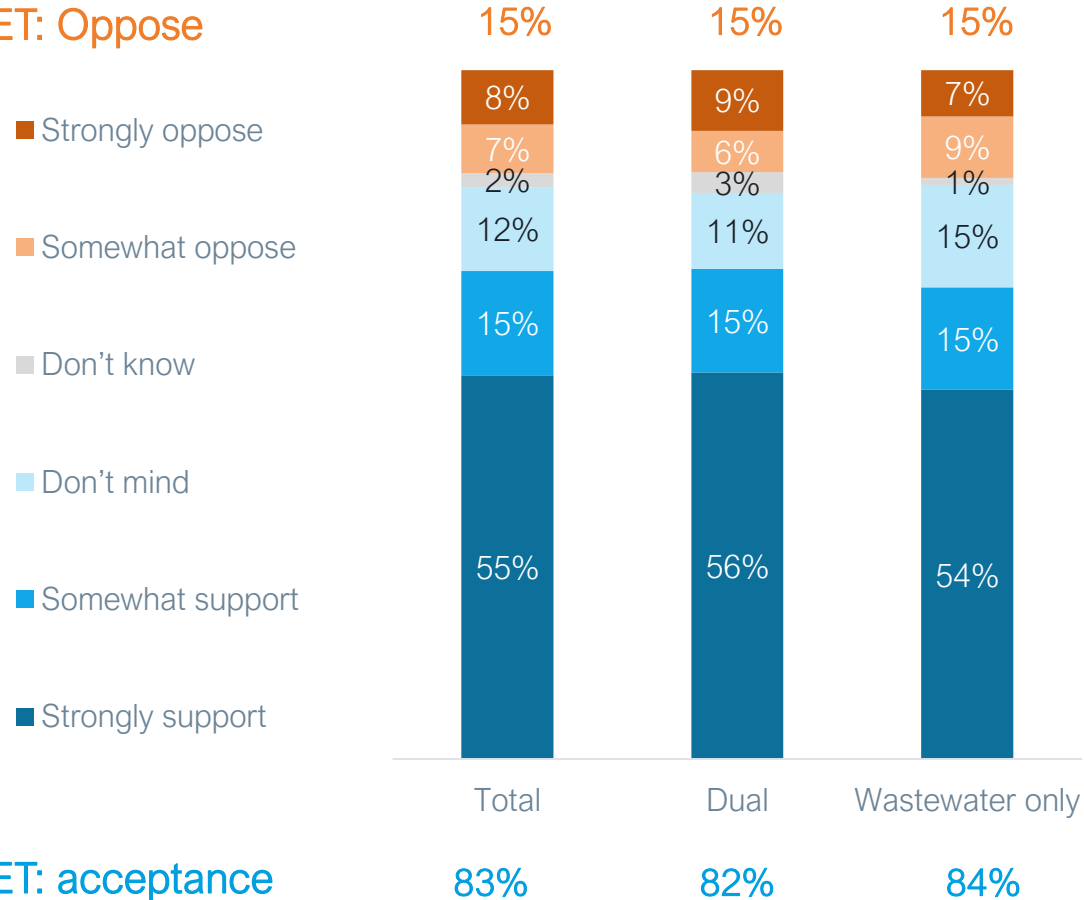
Q17 - How far would you support or oppose a discounted rate which would help 100,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 47p per month (£5.70 per year) / 19p per month (£2.33 per year) towards helping these low-income customers
Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

In principle support for the concept of a discounted rate

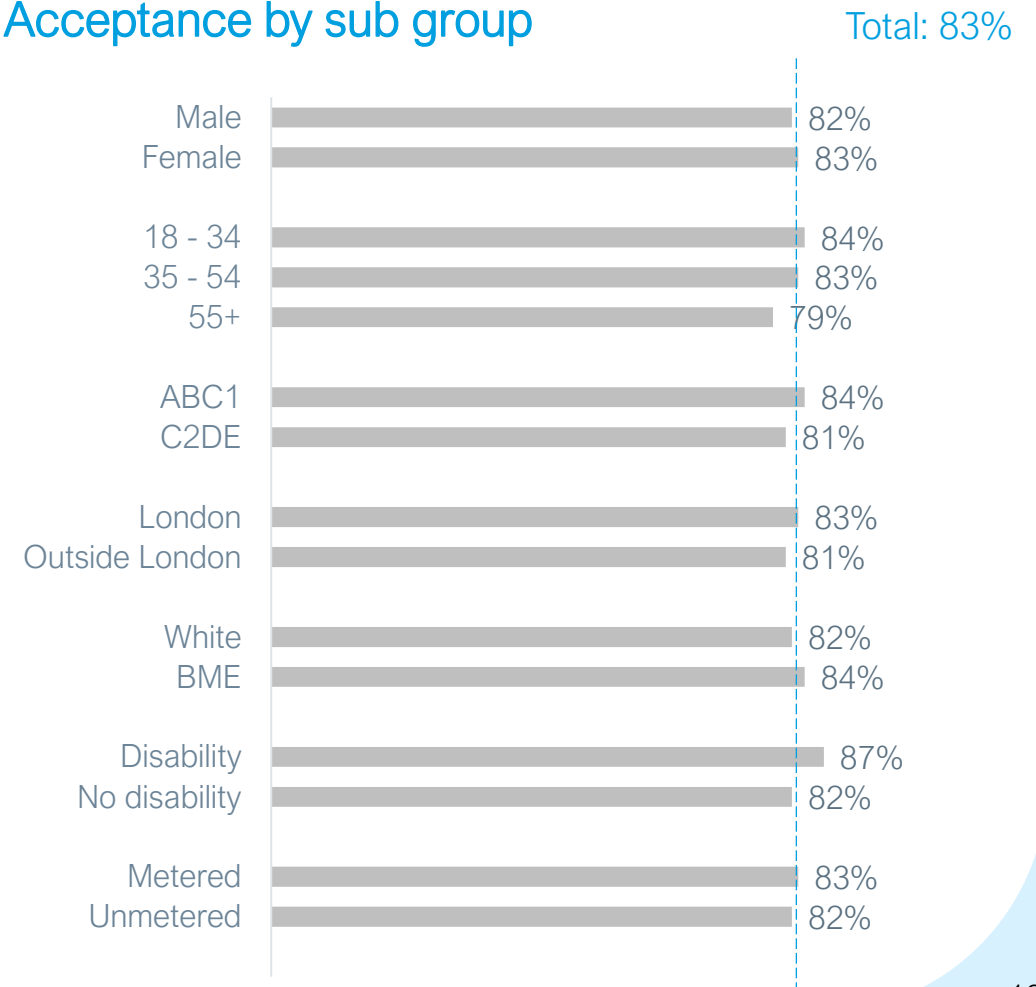
Dual: £2.85 per year, Wastewater only: £1.16 per year

Dual customers: 24p per month (£2.85 per year) / Wastewater only customers: 10p per month (£1.16 per year)

NET: Oppose



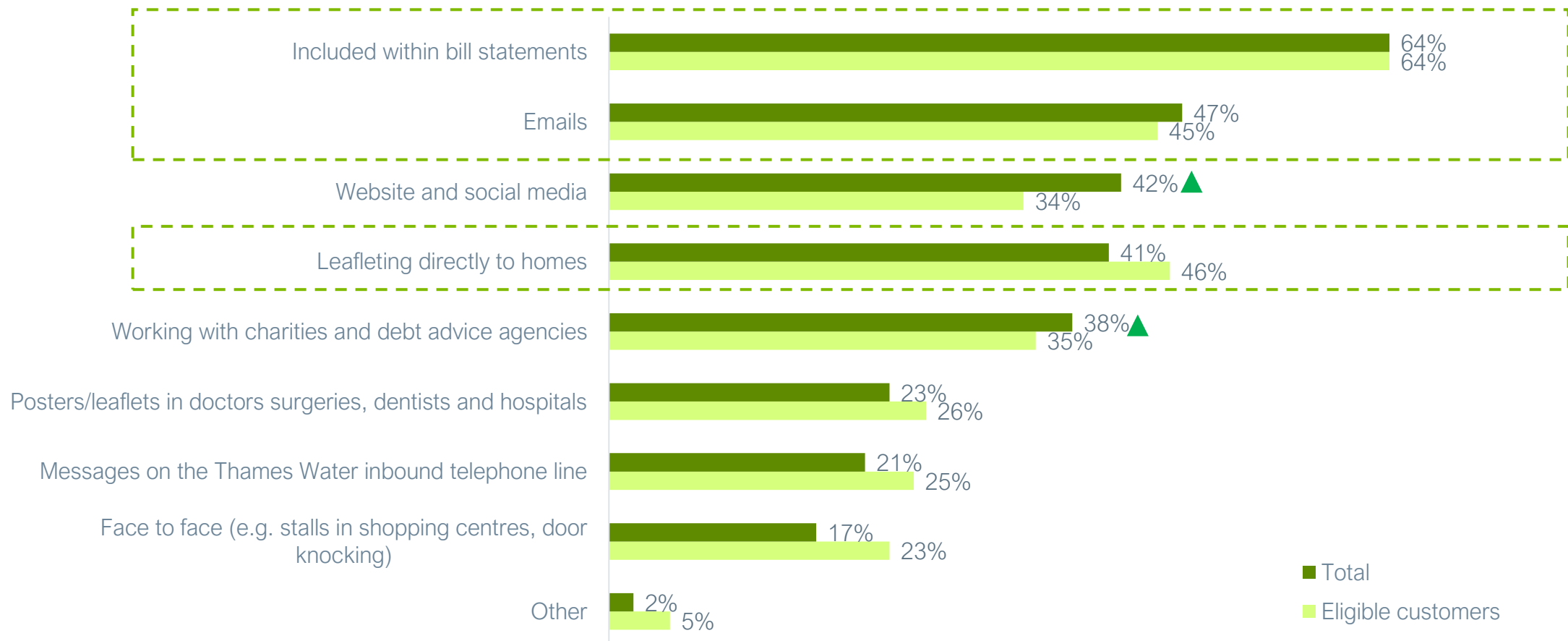
NET: Acceptance by sub group



Social Tariffs, Quantitative Survey, August to September 2022.
 Q18 - How far would you support or oppose a discounted rate which would help 50,000 additional households who are struggling to pay water & wastewater bills.
 All customers would pay up to an additional 24p per month (£2.85 per year) / 10p per month (£1.16 per year) towards helping these low-income customers
 Base: All respondents (n=1100), Wastewater only (n=379), Dual customers (n=721)

Effective ways to communicate discounted rate

Including the information within bill statements, emails and leafletting are felt to be the most effective ways to communicate the discounted rate, particularly for those eligible



Social Tariffs, Quantitative Survey, August to September 2022.

Q19. Which of the following do you think are the most effective ways for Thames Water to communicate its discounted rate to customers that might be eligible?

Base: All respondents (n=1100) all eligible (n=254)

▲ ▼ Triangle: Significant difference at 95% conf. level.

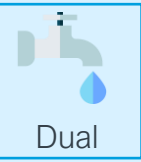
Appendix



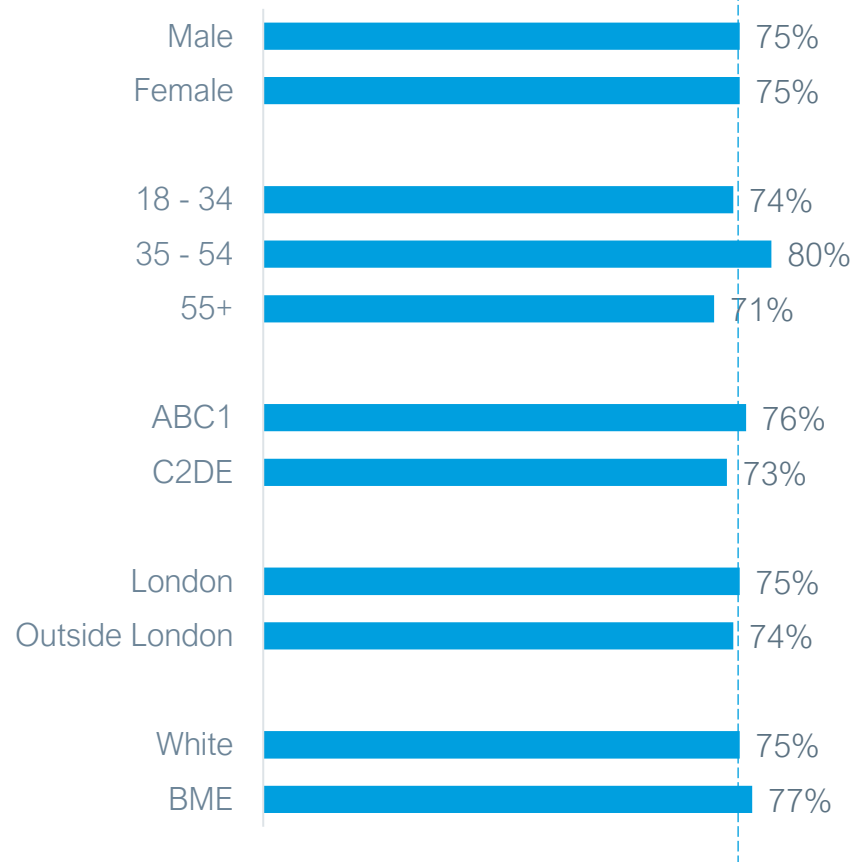
Acceptance* of cross subsidy by price and subgroups

*Acceptance is the NET of strongly support, somewhat support and don't mind

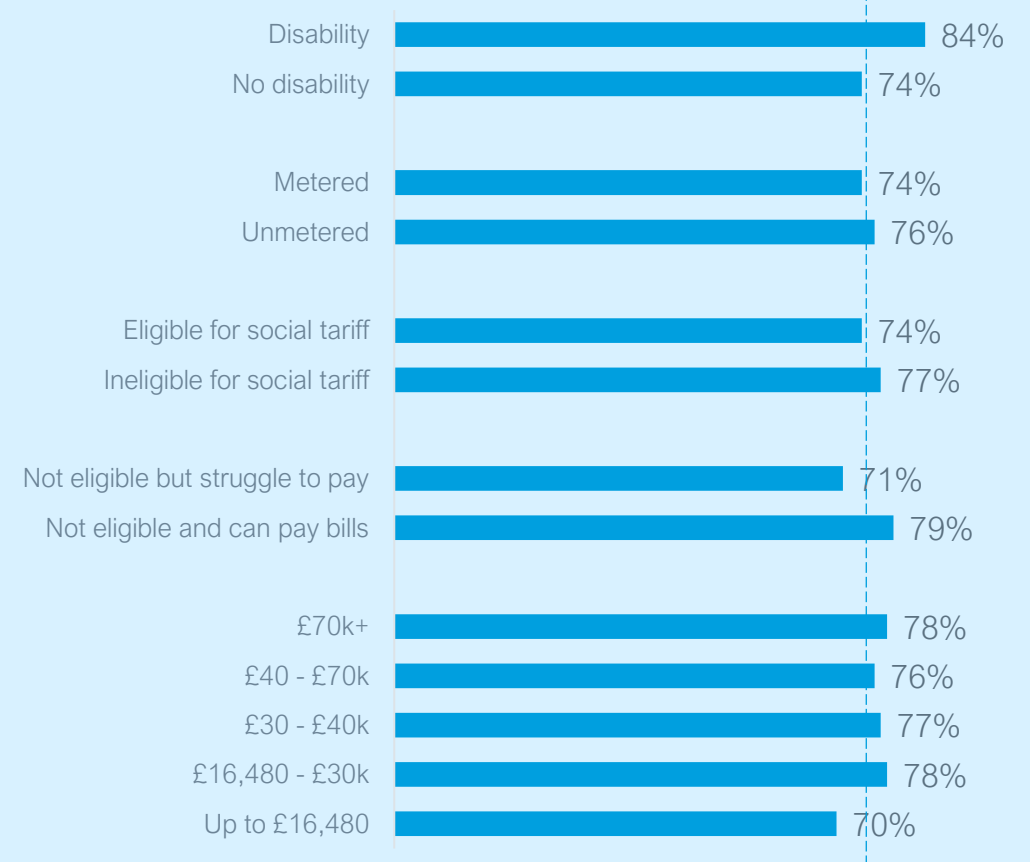
Dual customers accepting cross subsidy of £9.97 per year



Total acceptance = 75%

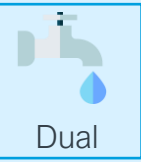


Total acceptance = 75%

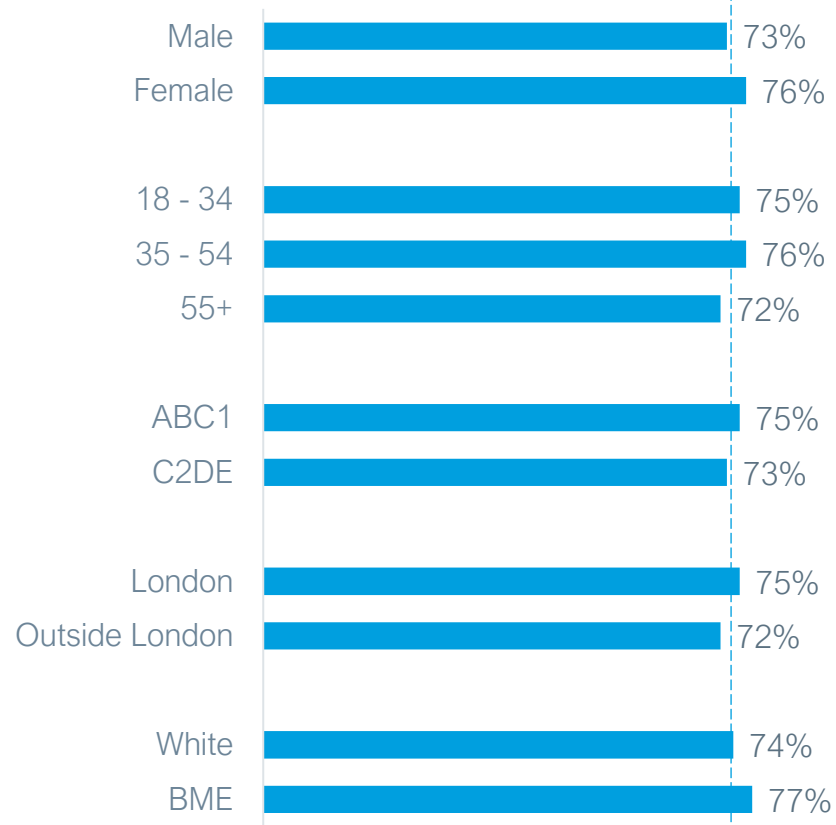


Social Tariffs, Quantitative Survey, August to September 2022
 Q15 - How far would you support or oppose a discounted rate which would help 175,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 83p per month (£9.97 per year) towards helping these low-income customers
 Base: Dual Customers (n=721)

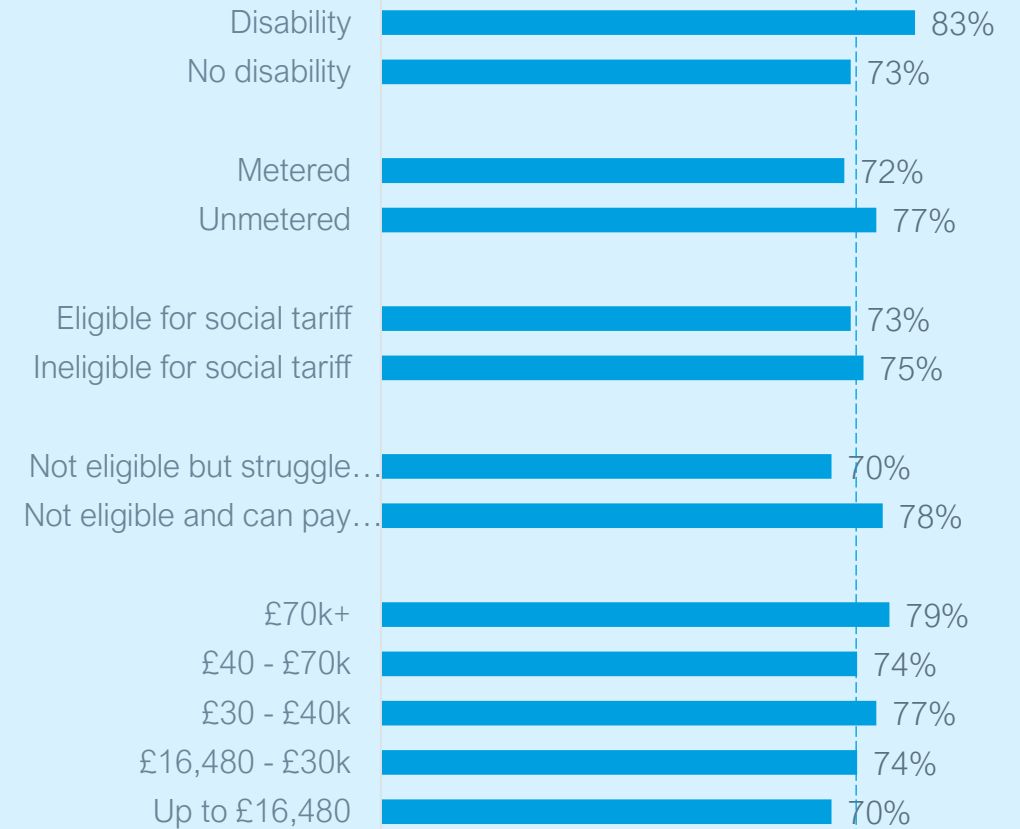
Dual customers accepting cross subsidy of £8.54 per year



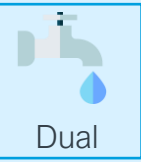
Total acceptance = 74%



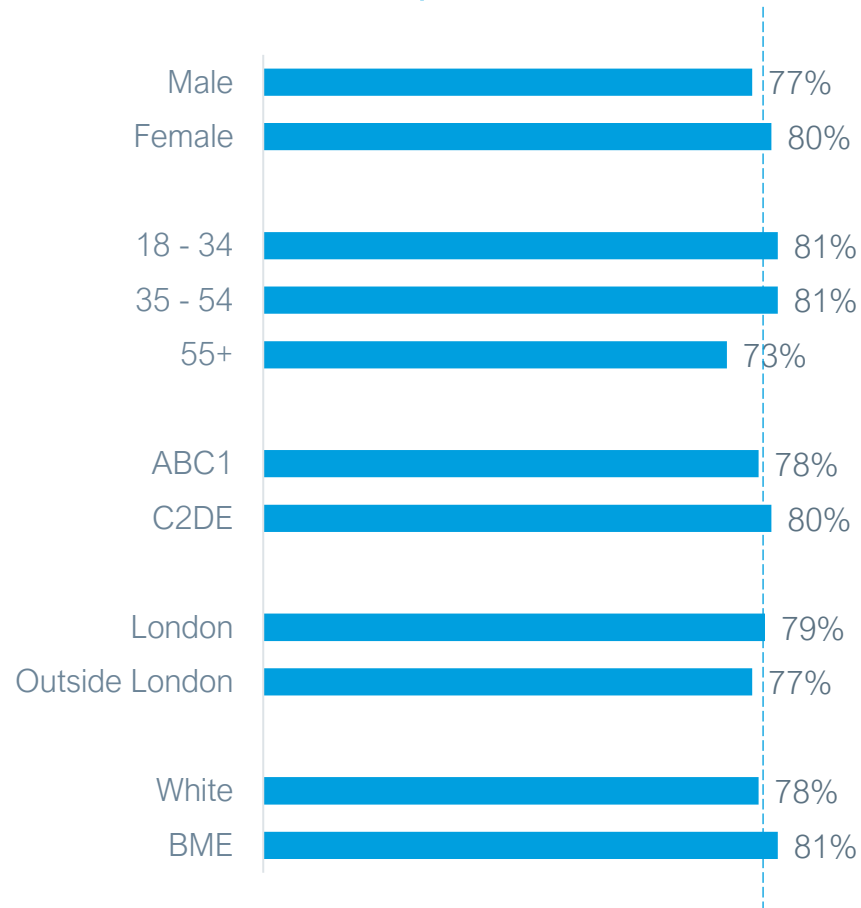
Total acceptance = 74%



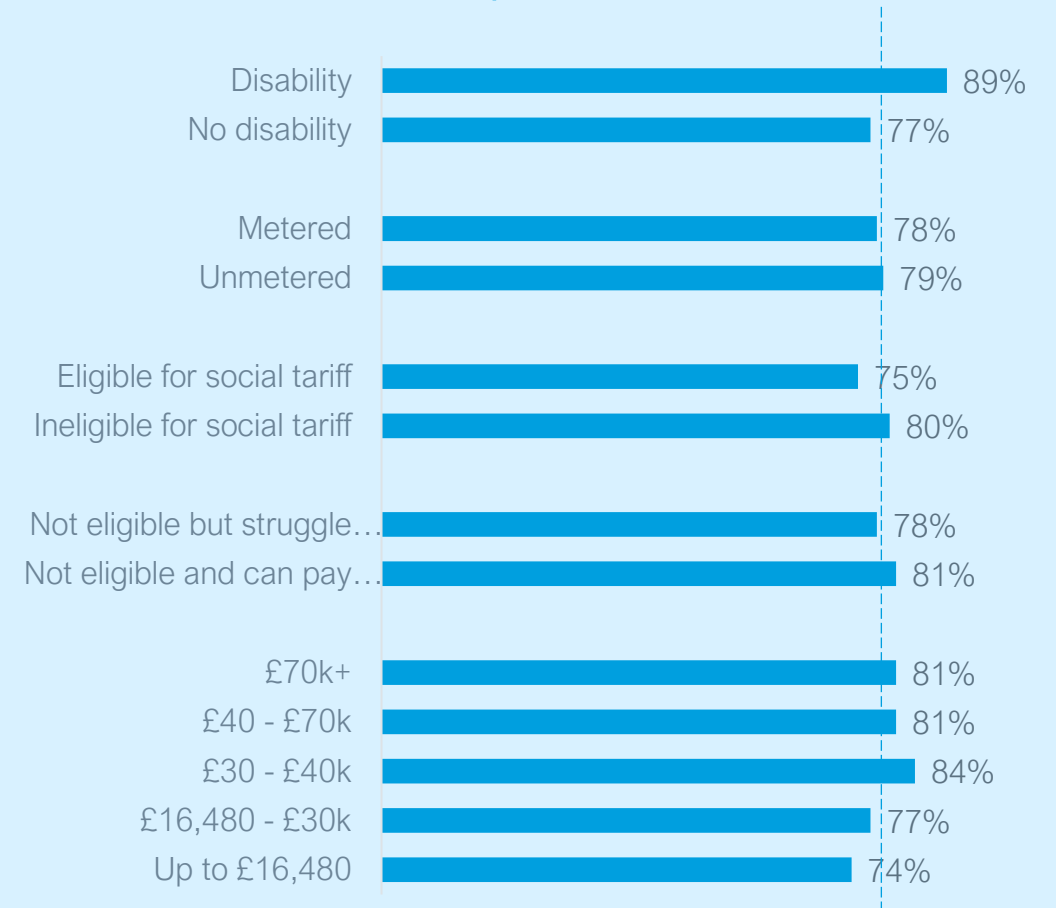
Dual customers accepting cross subsidy of £5.70 per year



Total acceptance = 79%

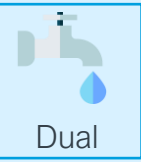


Total acceptance = 79%

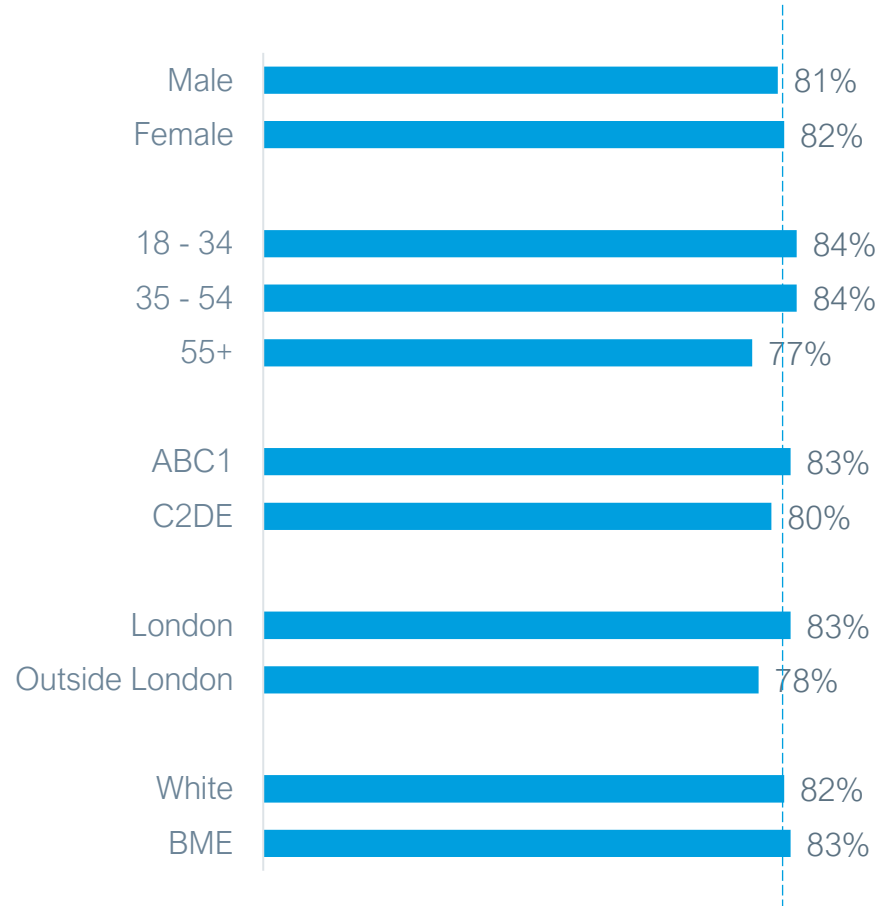


Social Tariffs, Quantitative Survey, August to September 2022
 Q17 - How far would you support or oppose a discounted rate which would help 100,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 47p per month (£5.70 per year) towards helping these low-income customers
 Base: Dual Customers (n=721)

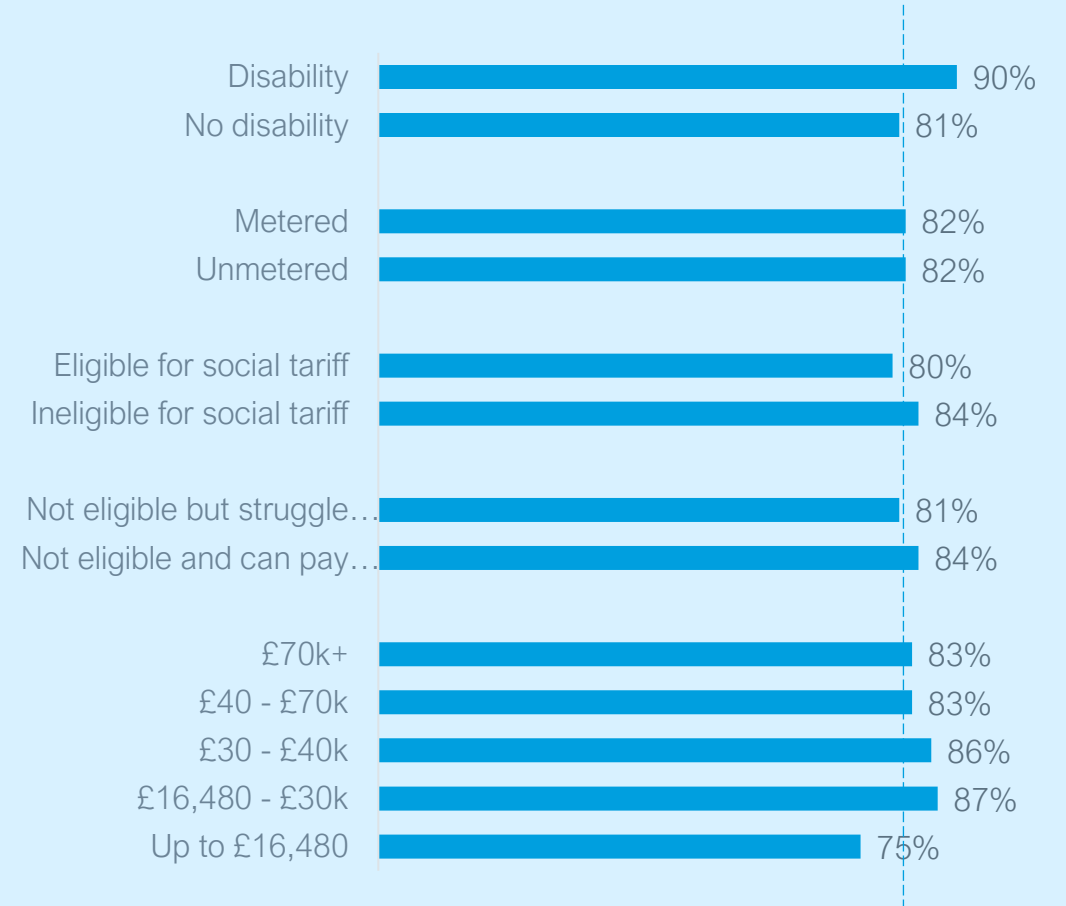
Dual customers accepting cross subsidy of £2.85 per year



Total acceptance = 82%



Total acceptance = 82%

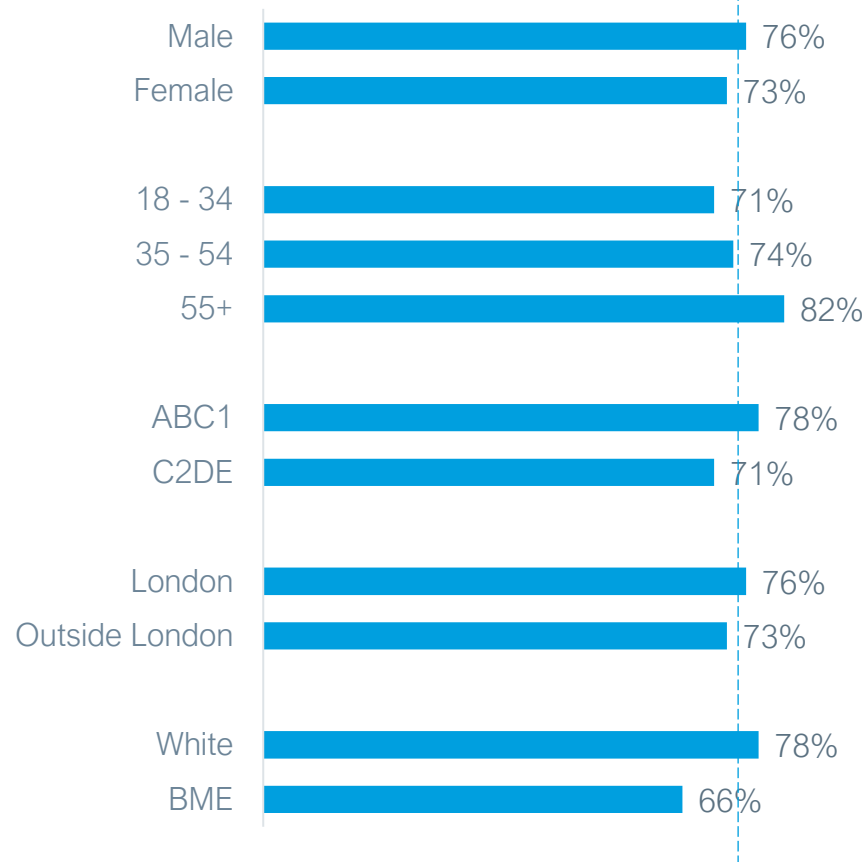


Social Tariffs, Quantitative Survey, August to September 2022.
 Q18 - How far would you support or oppose a discounted rate which would help 50,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 24p per month (£2.85 per year) towards helping these low-income customers
 Base: Dual Customers (n=721)

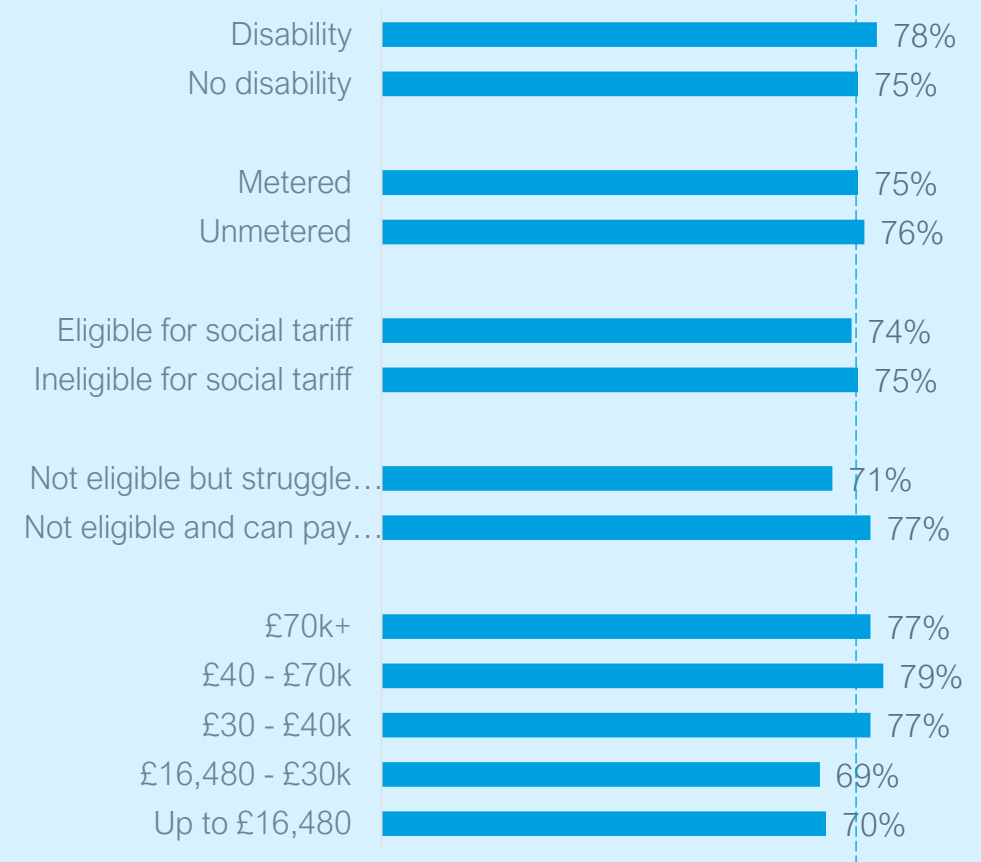
Wastewater customers accepting cross subsidy of £4.07 per year



Total acceptance = 75%



Total acceptance = 75%

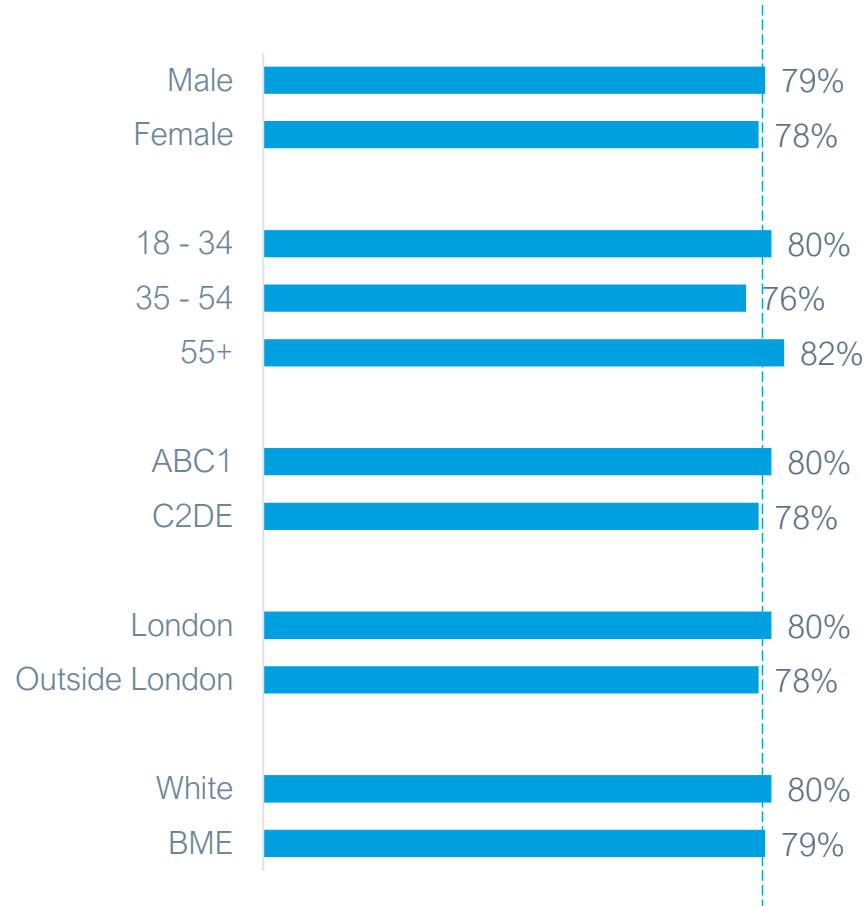


Social Tariffs, Quantitative Survey, August to September 2022
 Q15 - How far would you support or oppose a discounted rate which would help 175,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 34p per month (£4.07 per year) towards helping these low-income customers
 Base: Wastewater Customers (n=379)

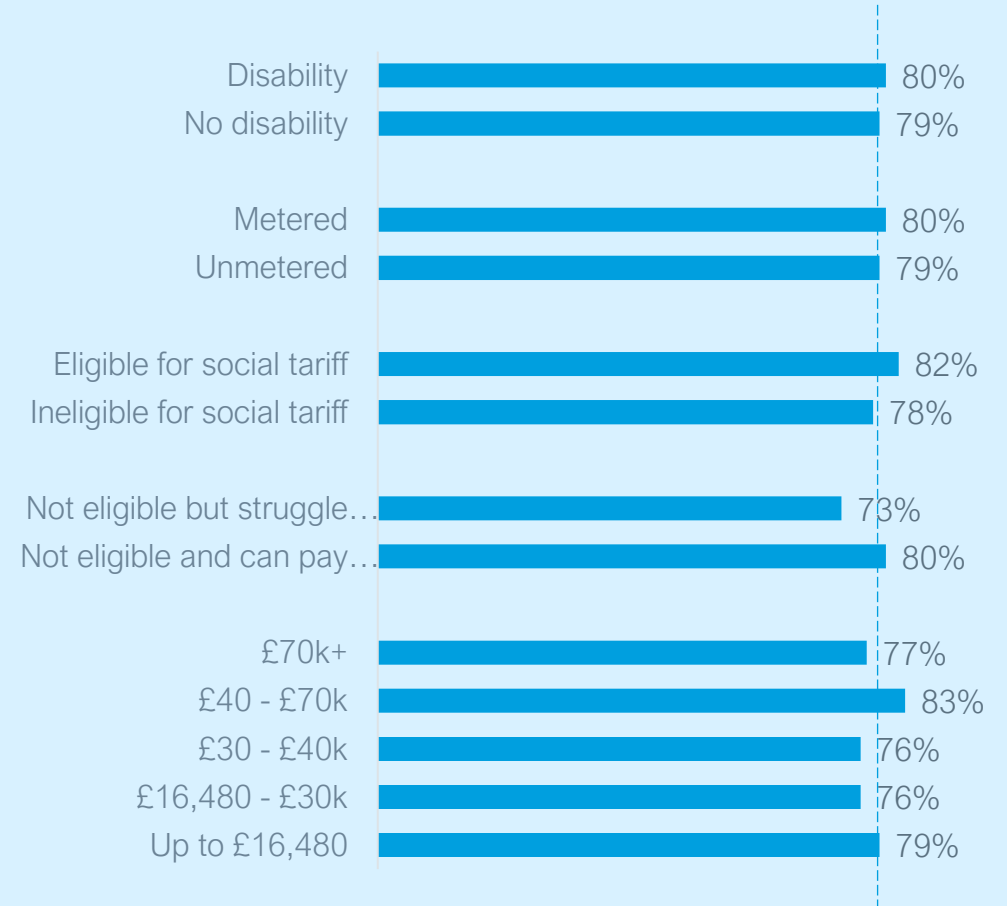
Wastewater customers accepting cross subsidy of £3.49 per year



Total acceptance = 79%



Total acceptance = 79%

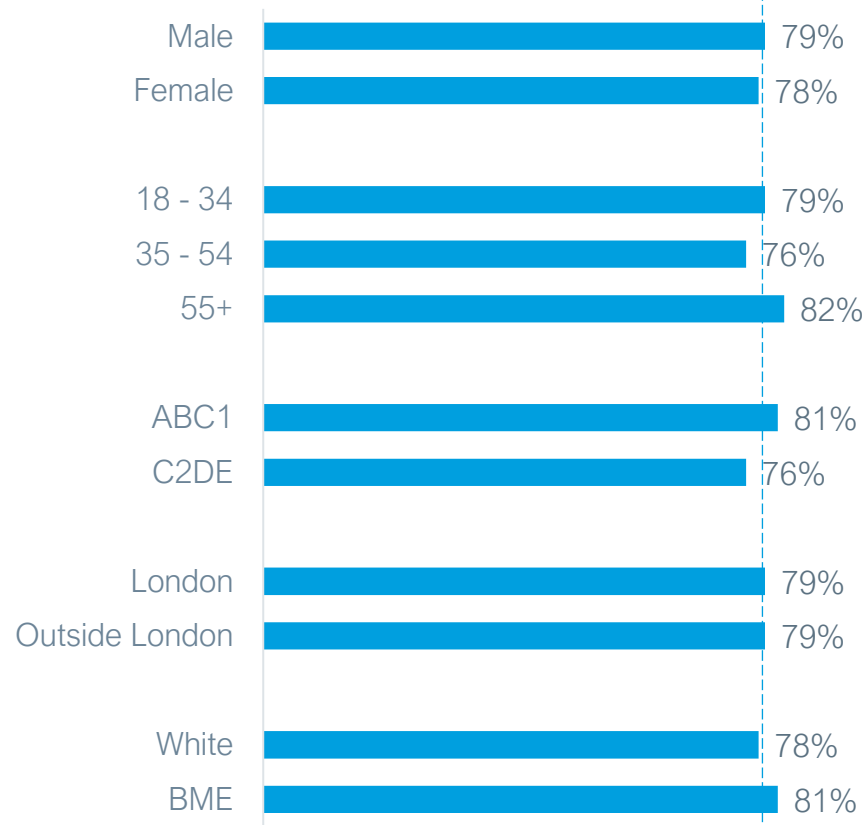


Social Tariffs, Quantitative Survey, August to September 2022
 Q16 - How far would you support or oppose a discounted rate which would help 150,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 29p per month (£3.49 per year) towards helping these low-income customers
 Base: Wastewater Customers (n=379)

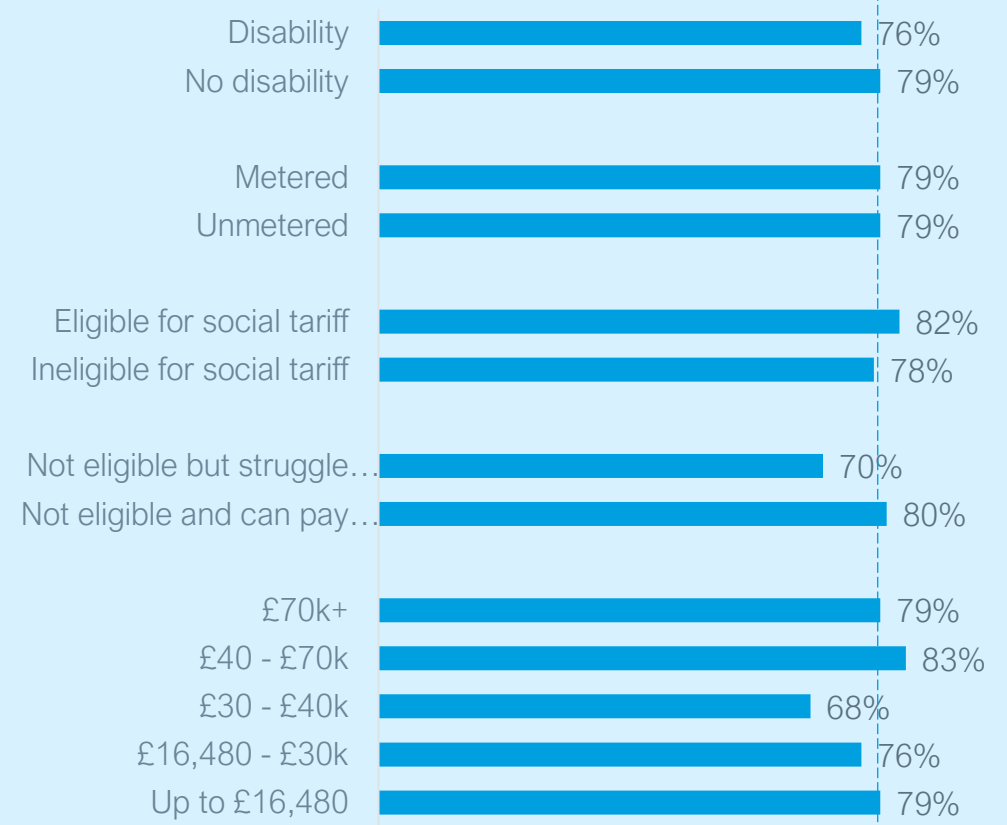
Wastewater customers accepting cross subsidy of £2.33 per year



Total acceptance = 79%



Total acceptance = 79%

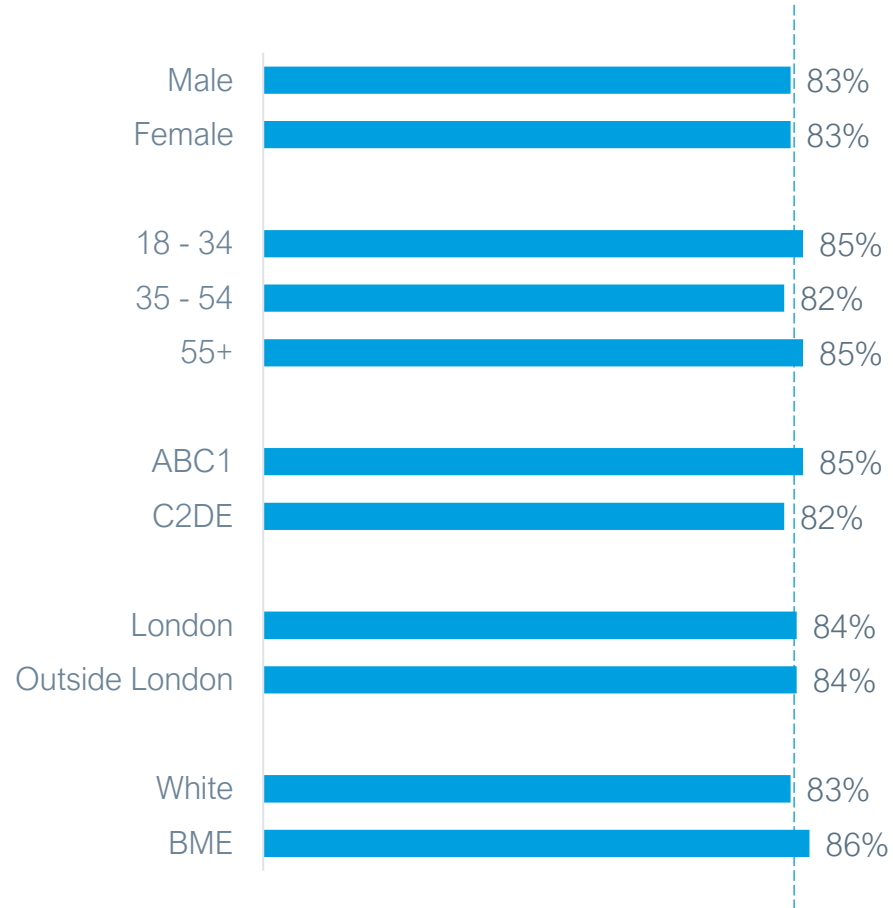


Social Tariffs, Quantitative Survey, August to September 2022
 Q17 - How far would you support or oppose a discounted rate which would help 100,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 19p per month (£2.33 per year) towards helping these low-income customers
 Base: Wastewater Customers (n=379)

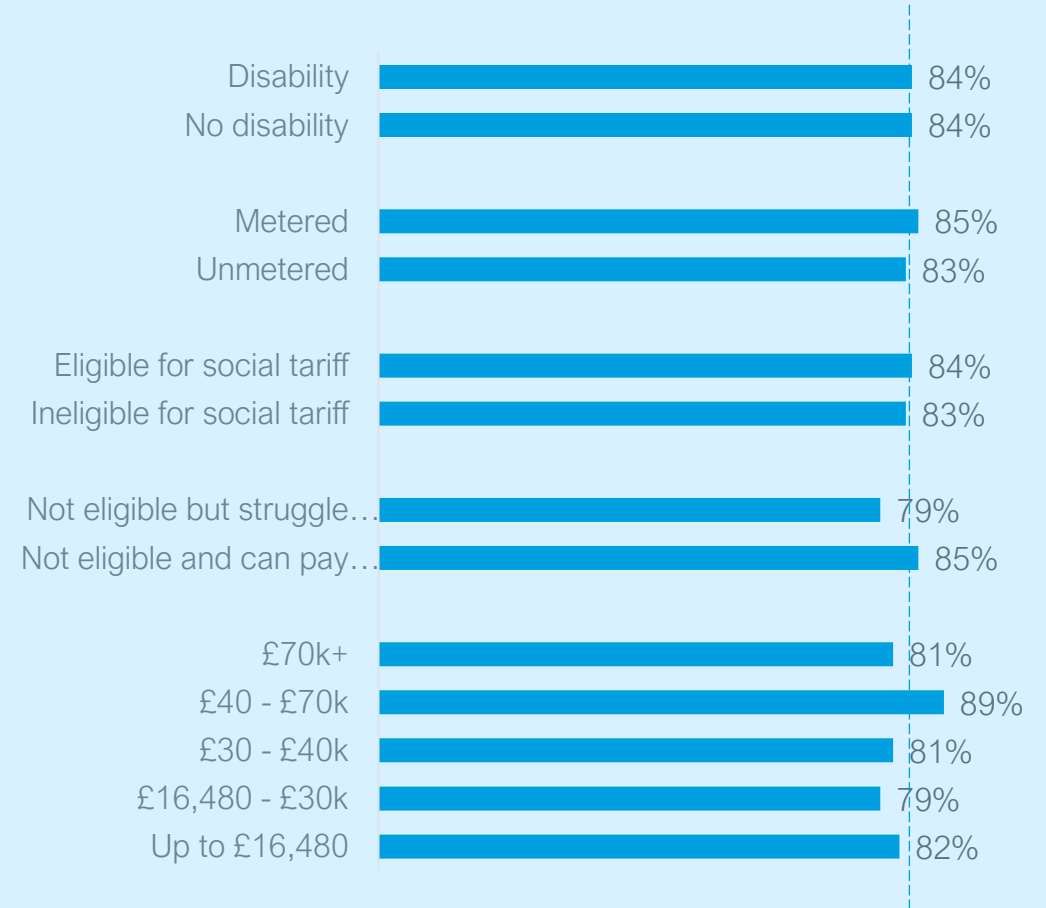
Wastewater customers accepting cross subsidy of £1.16 per year



Total acceptance = 84%



Total acceptance = 84%

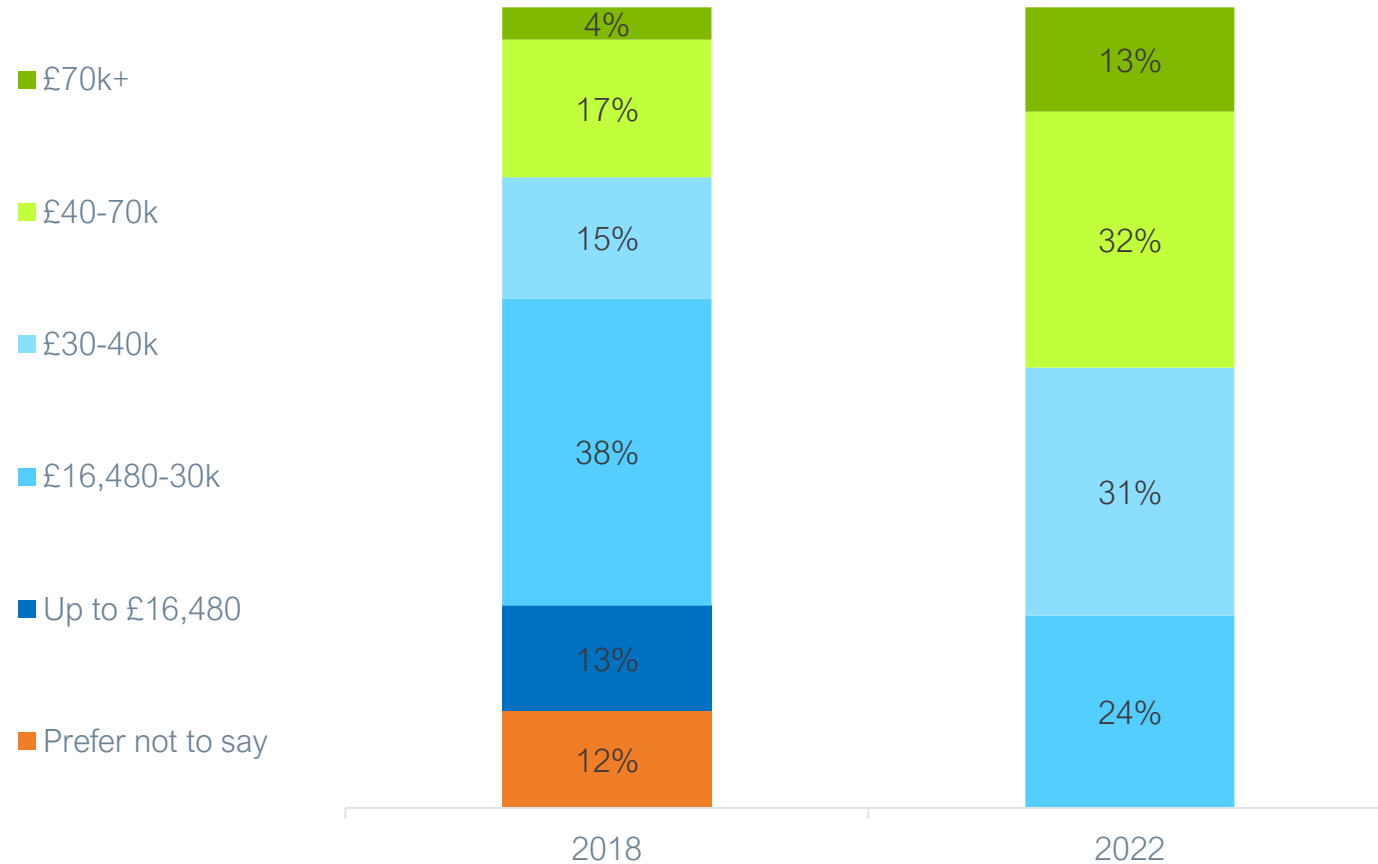


Social Tariffs, Quantitative Survey, August to September 2022

Q18 - How far would you support or oppose a discounted rate which would help 50,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 10p per month (£1.16 per year) towards helping these low-income customers

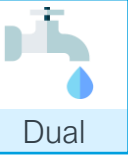
Base: Wastewater Customers (n=379)

Annual gross household income among those ineligible for tariff, but struggle to pay

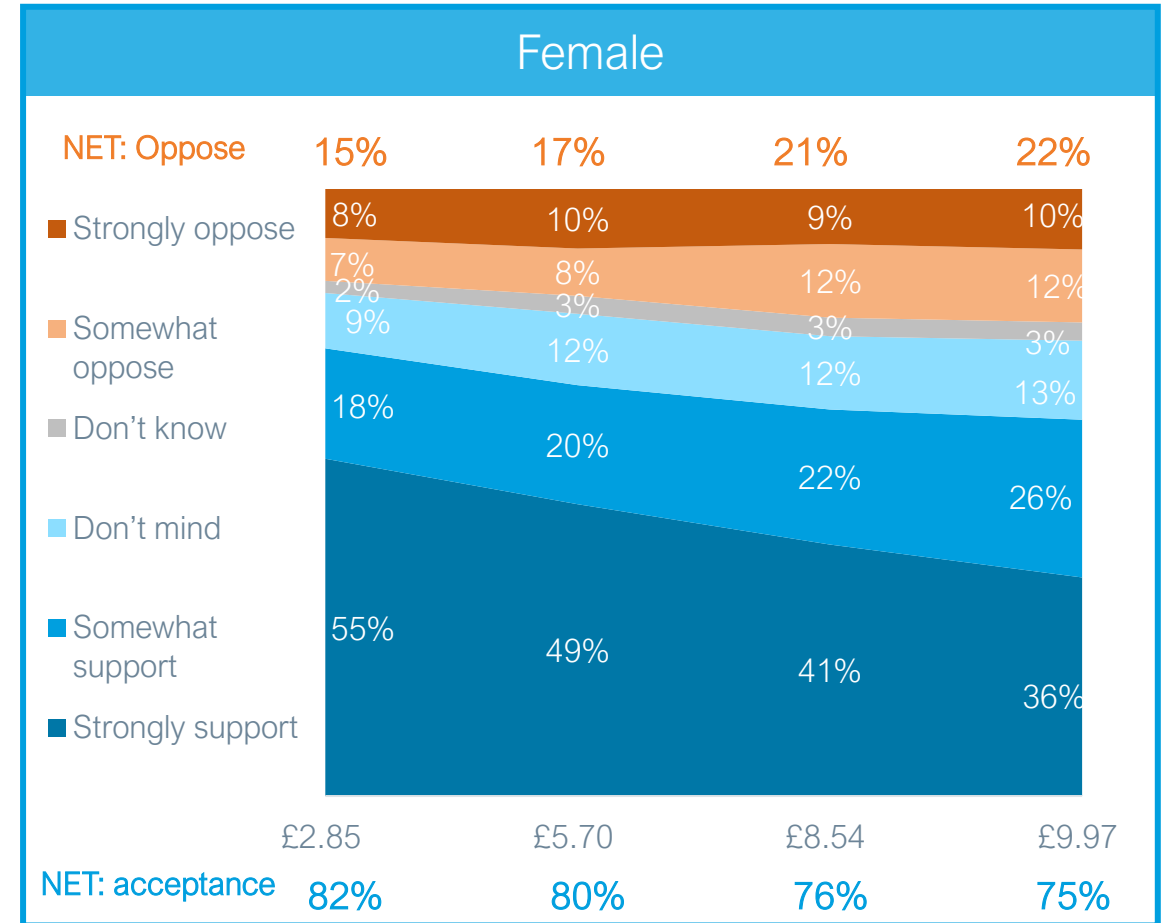
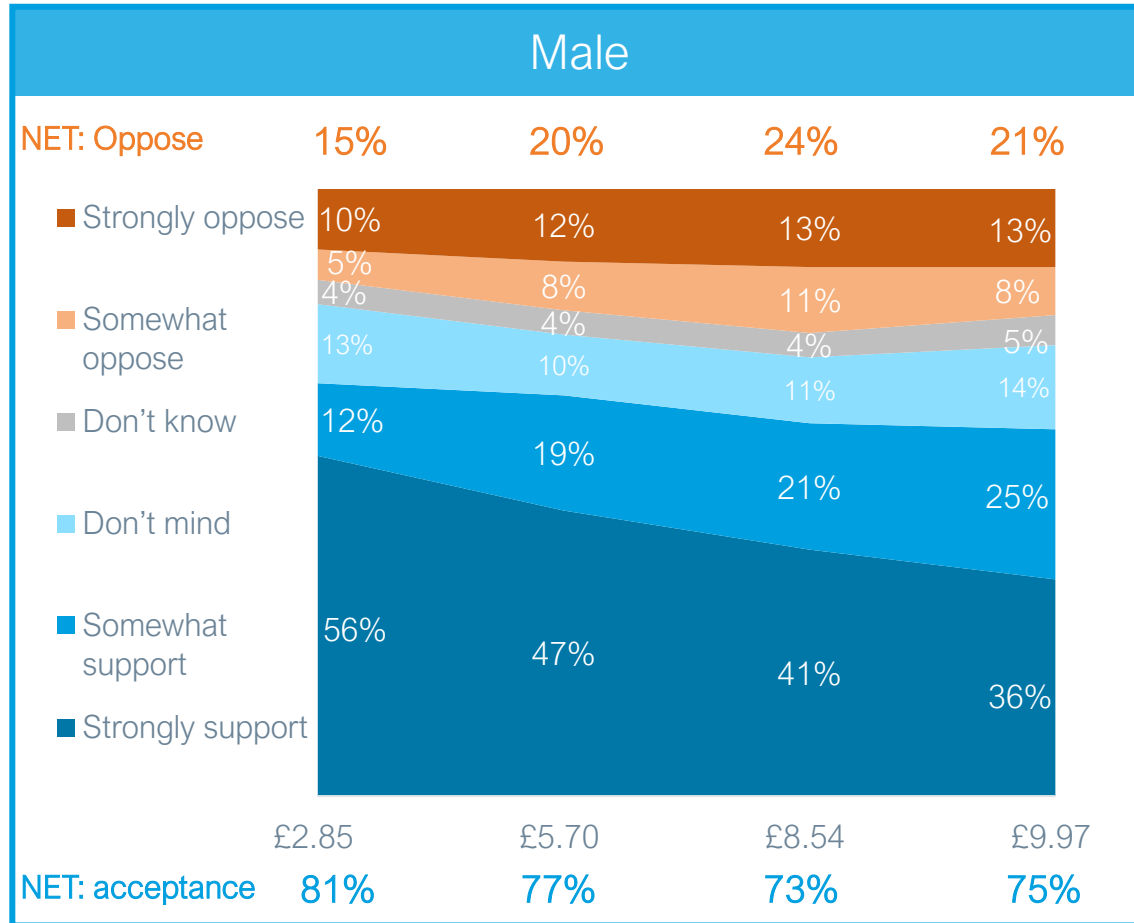


Social Tariffs, Quantitative Survey, August to September 2022

Q8a - What is the combined gross income of your household? By this we mean how much money do all the people in your household have coming in, before Tax and National Insurance deductions. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit). Base: All not eligible but struggle to pay (n=208)



Acceptance of cross subsidy: Male vs. Female customers

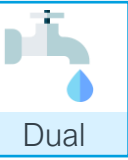


Social Tariffs, Quantitative Survey, August to September 2022.

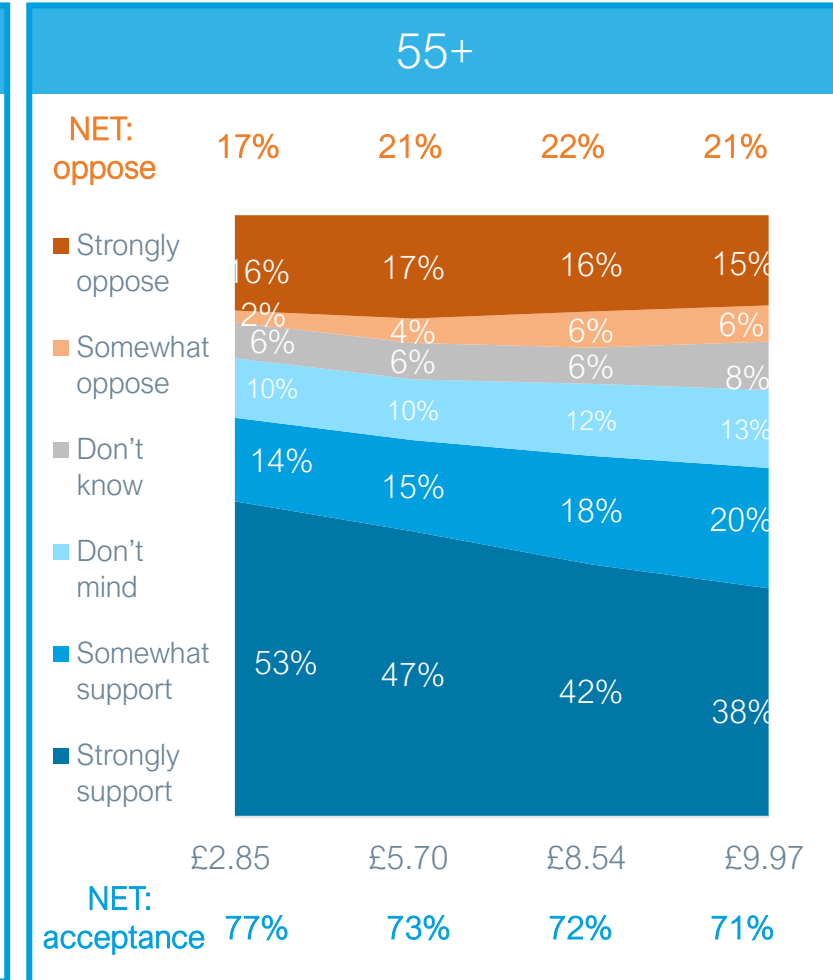
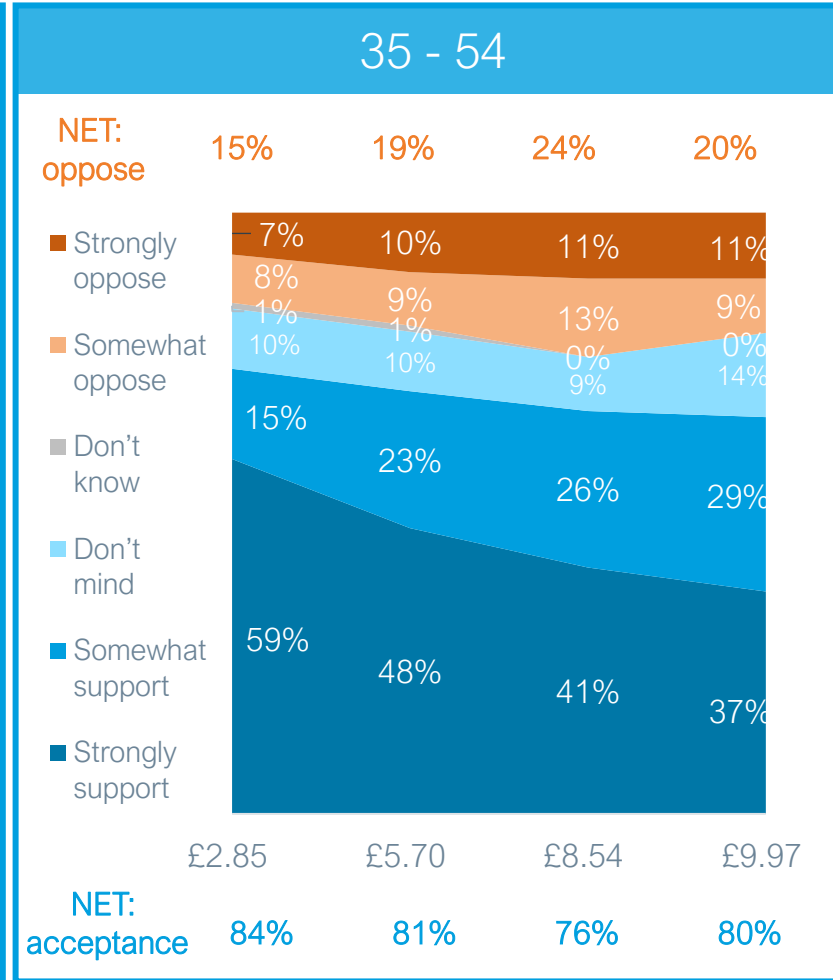
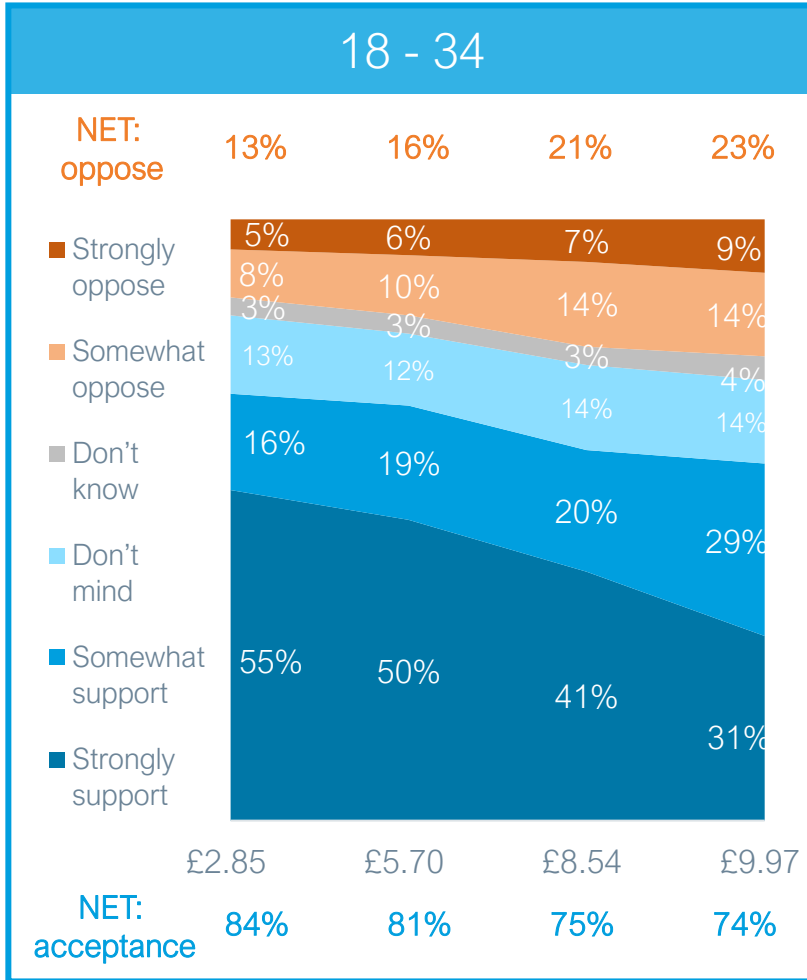
Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.

Base: Dual customers (n=721); Male (n=331), Female (n=381)

*Acceptance is the NET of strongly support, somewhat support and don't mind



Acceptance of cross subsidy: Customers of Different Ages



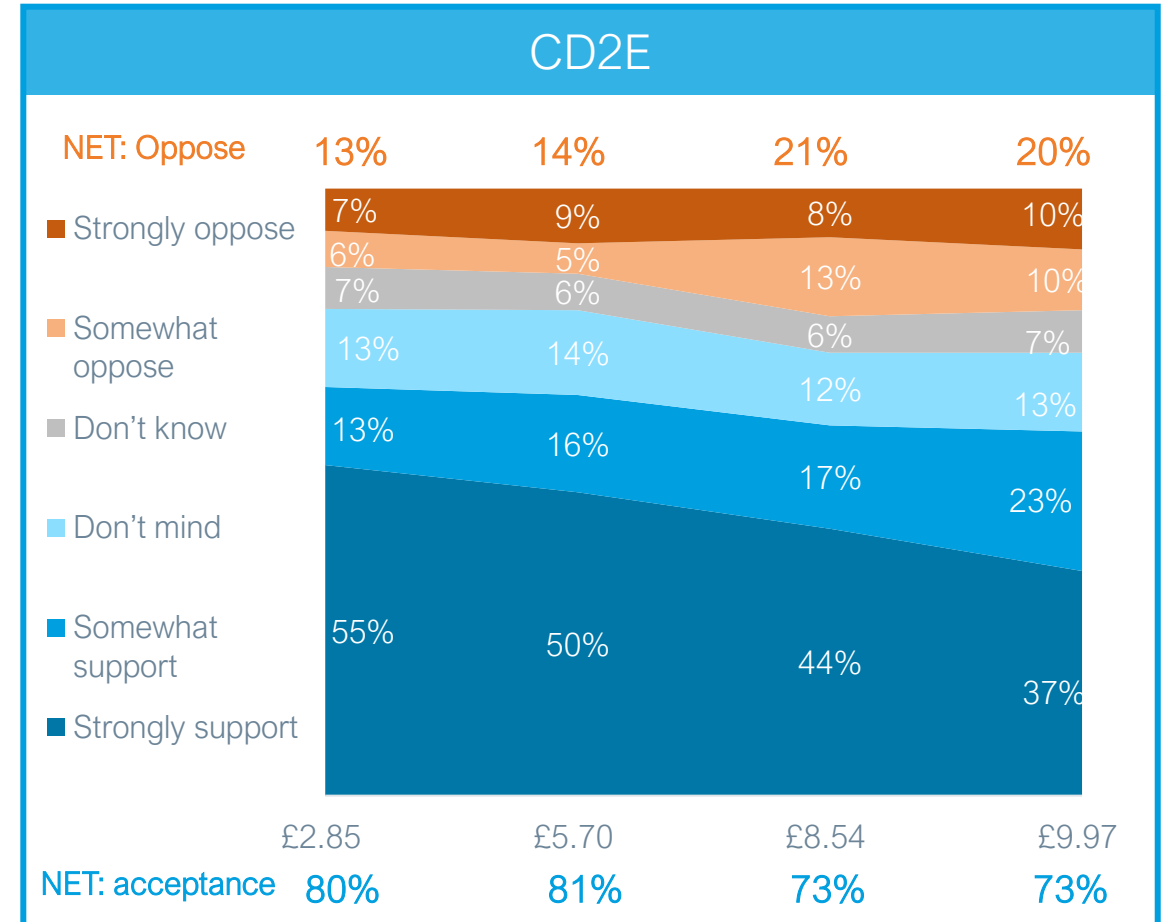
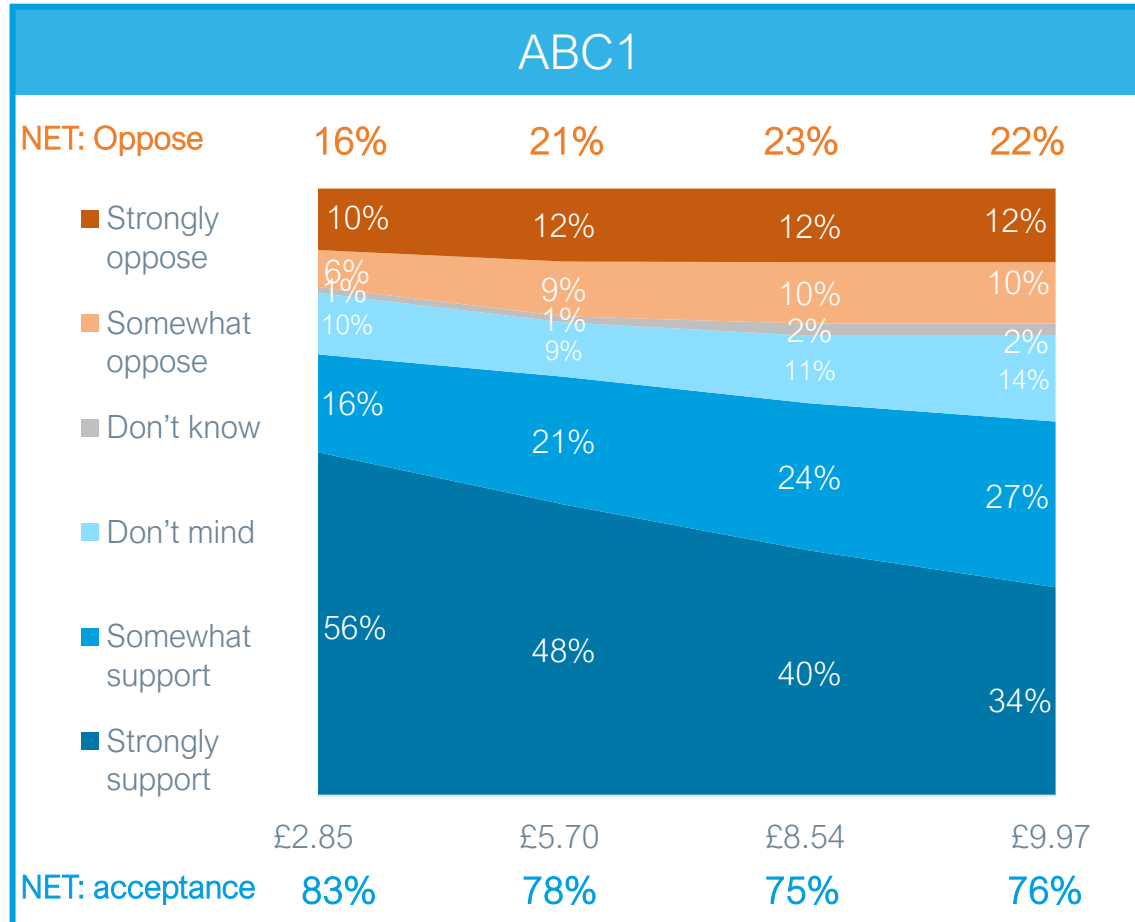
Social Tariffs, Quantitative Survey, August to September 2022.

Q15 - Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.

Base: Dual customers (n=721); 18-34 (n=238), 35 - 54 (n=242), 55+ (n=234)

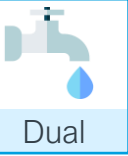
*Acceptance is the NET of strongly support, somewhat support and don't mind

Acceptance of cross subsidy: ABC1 vs. CD2E customers

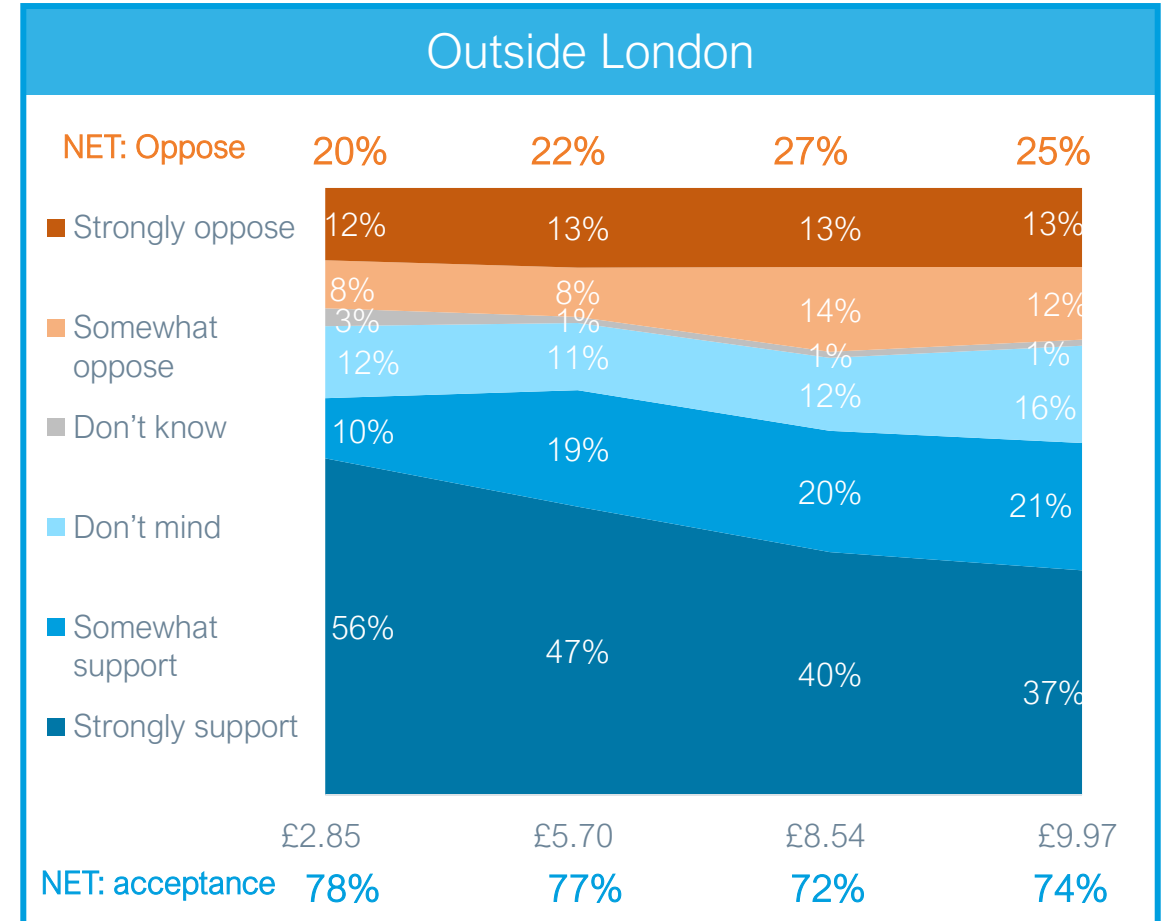
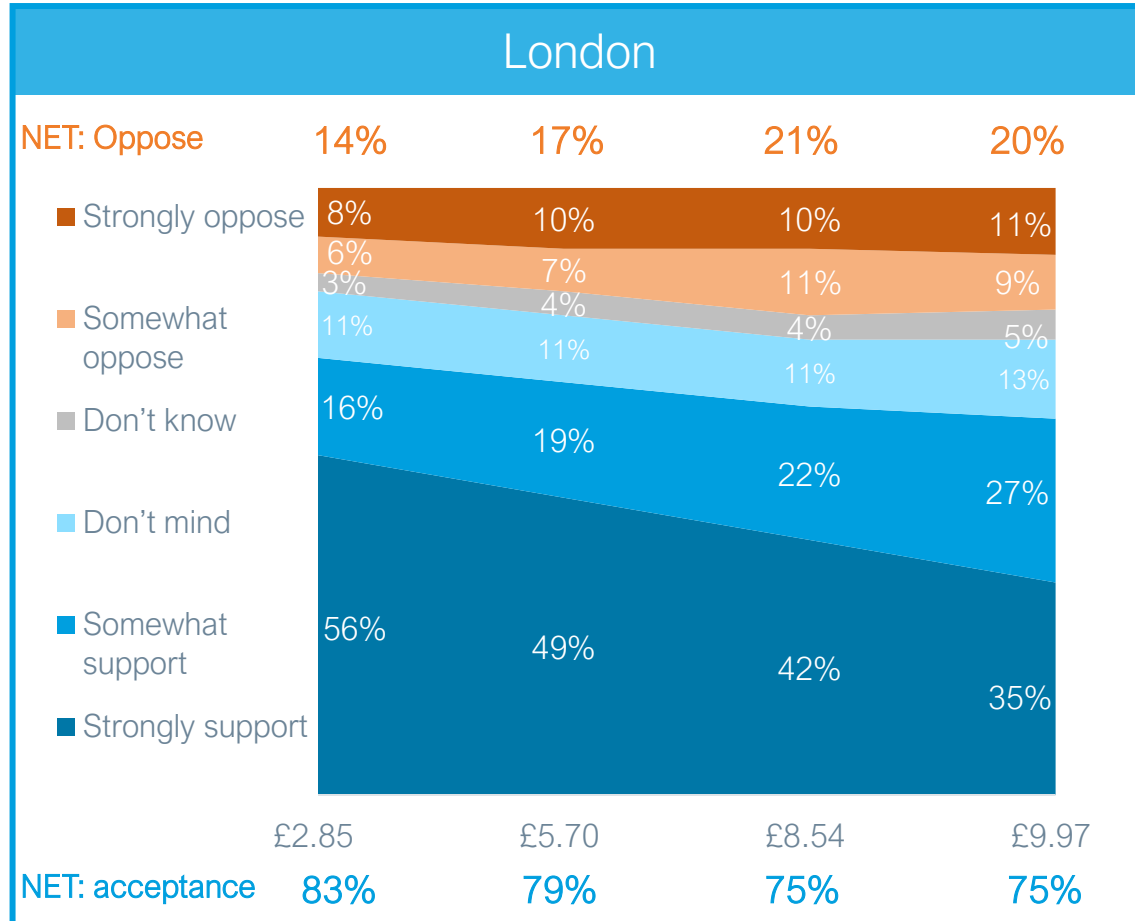


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); ABC1 (n=445), C2DE (n=276)

*Acceptance is the NET of strongly support, somewhat support and don't mind

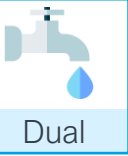


Acceptance of cross subsidy: London vs. Outside London

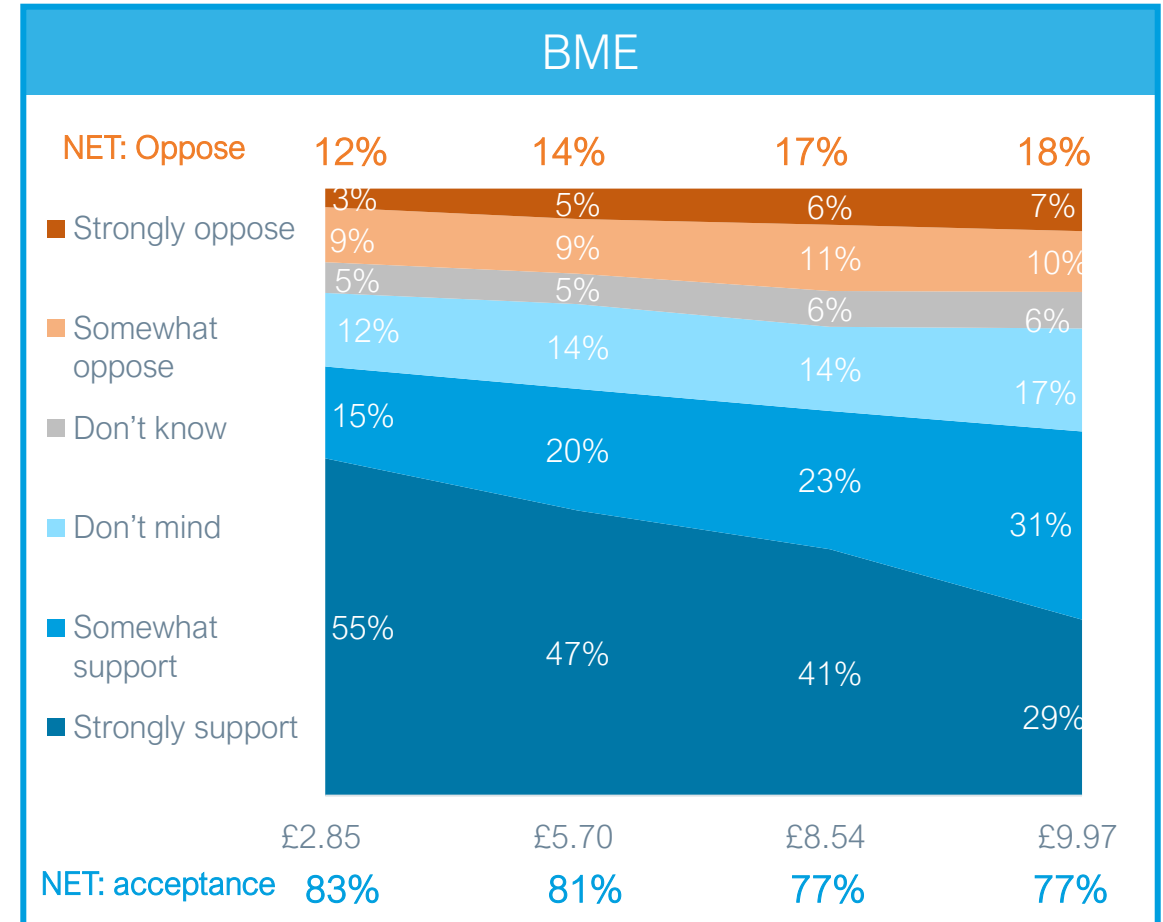
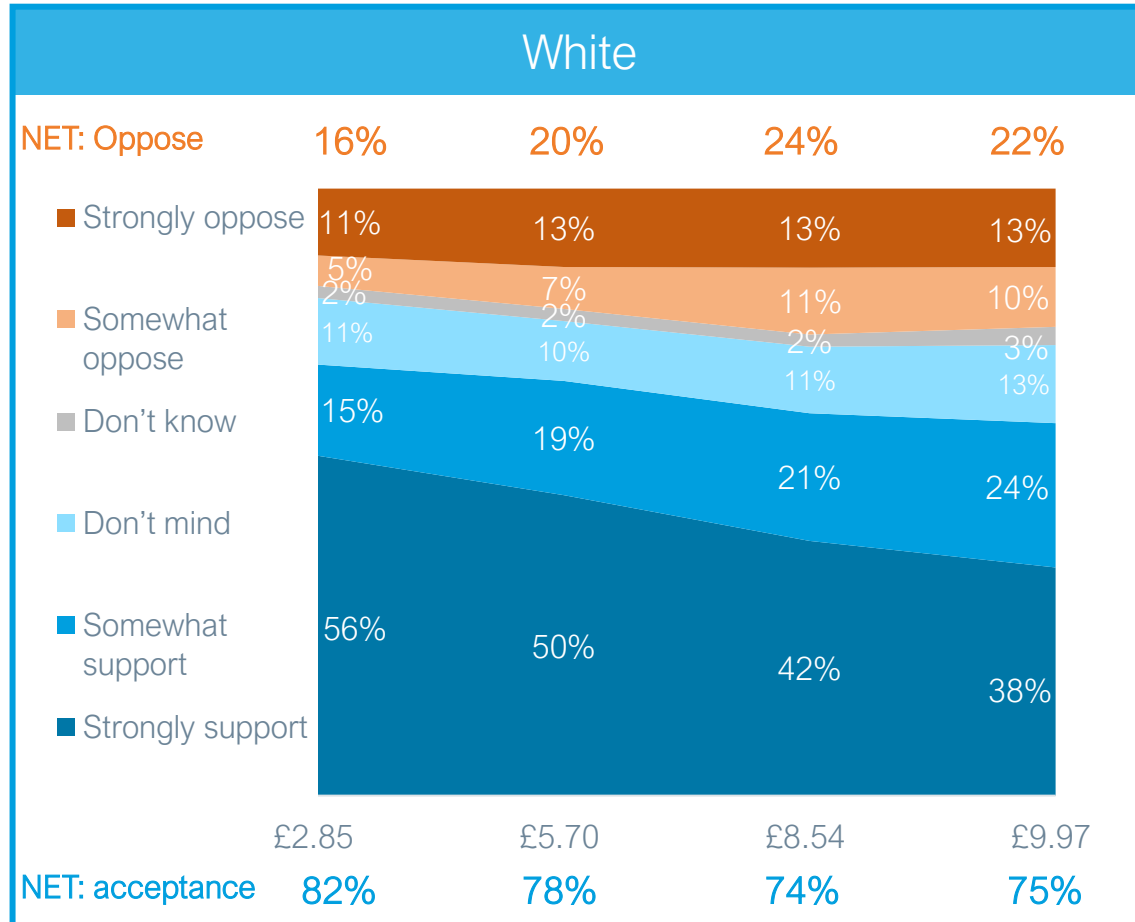


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); London (n=549), Outside London (n=172)

*Acceptance is the NET of strongly support, somewhat support and don't mind



Acceptance of cross subsidy: White vs. BME customers



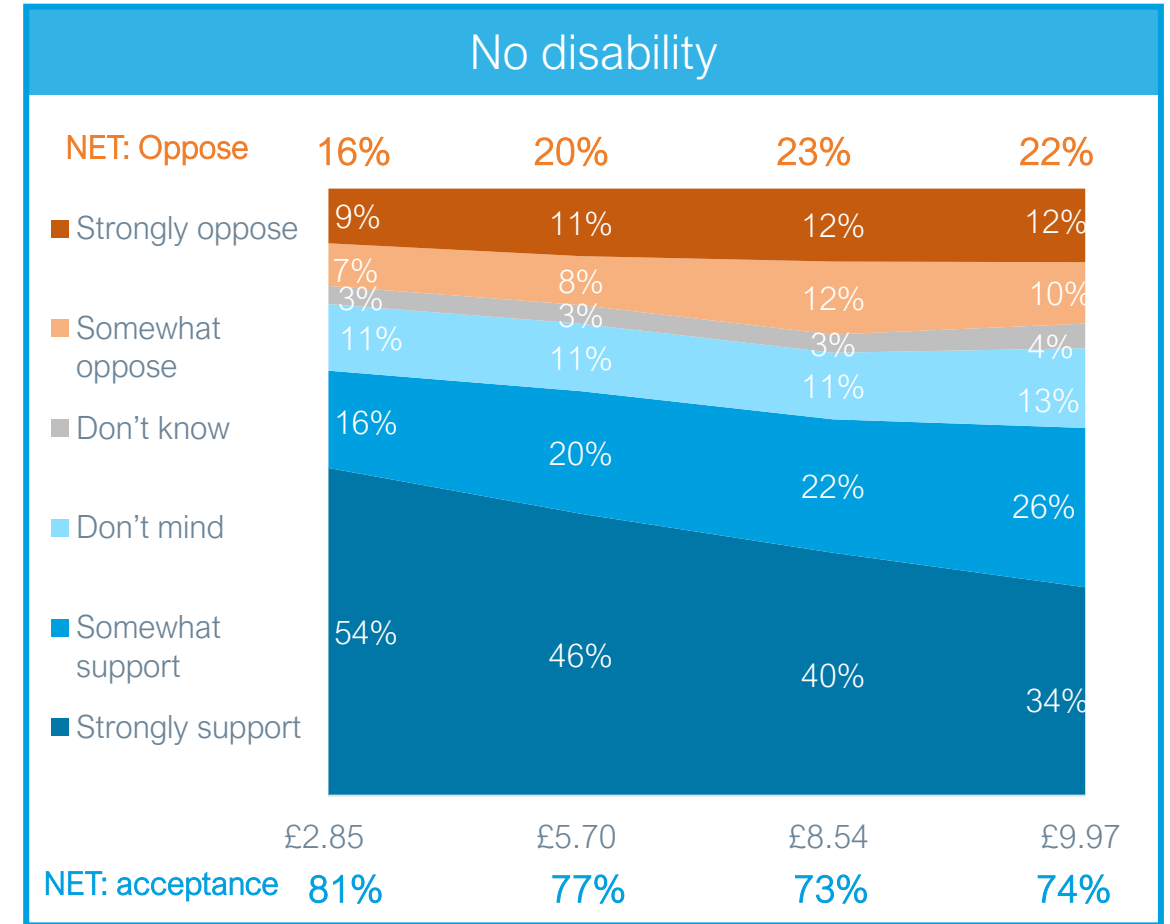
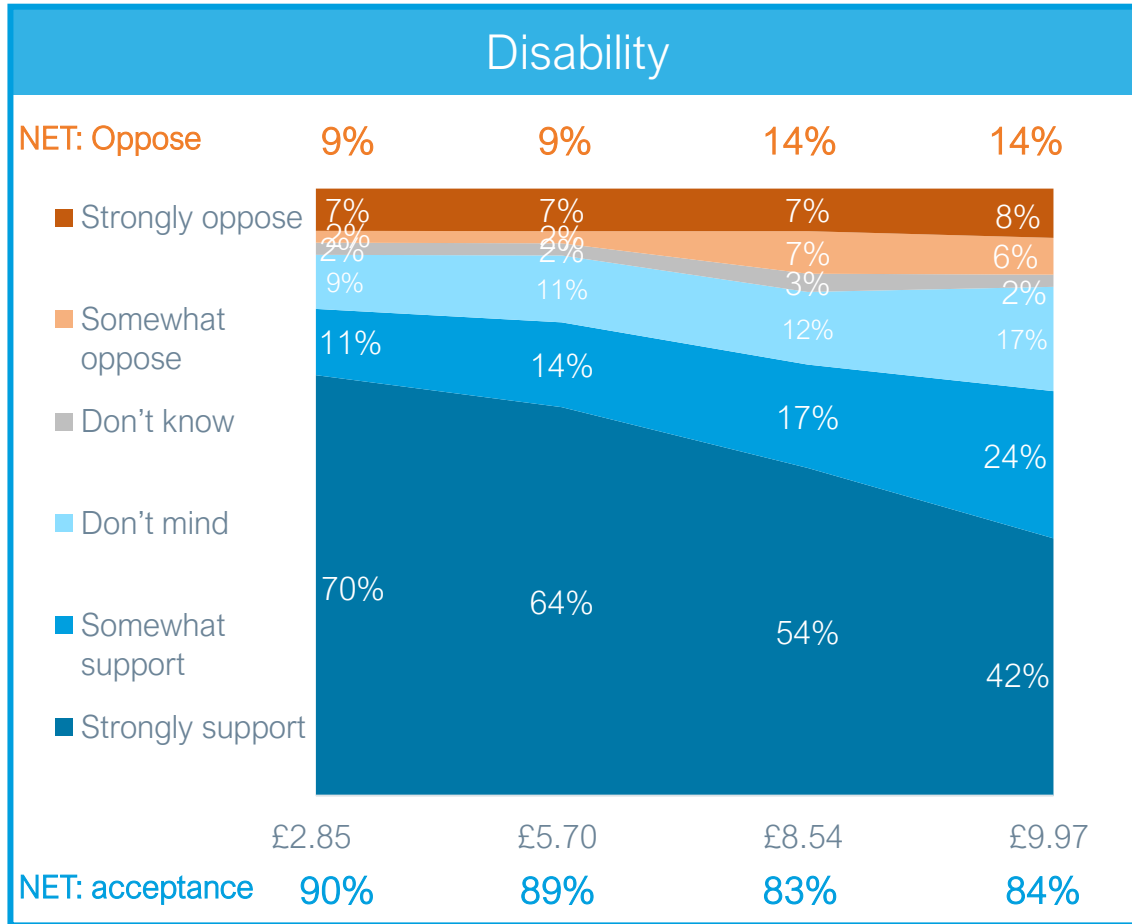
Social Tariffs, Quantitative Survey, August to September 2022.

Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional...towards helping these low-income customers.

Base: Dual customers (n=721); White (n=568), BME (n=139)

*Acceptance is the NET of strongly support, somewhat support and don't mind

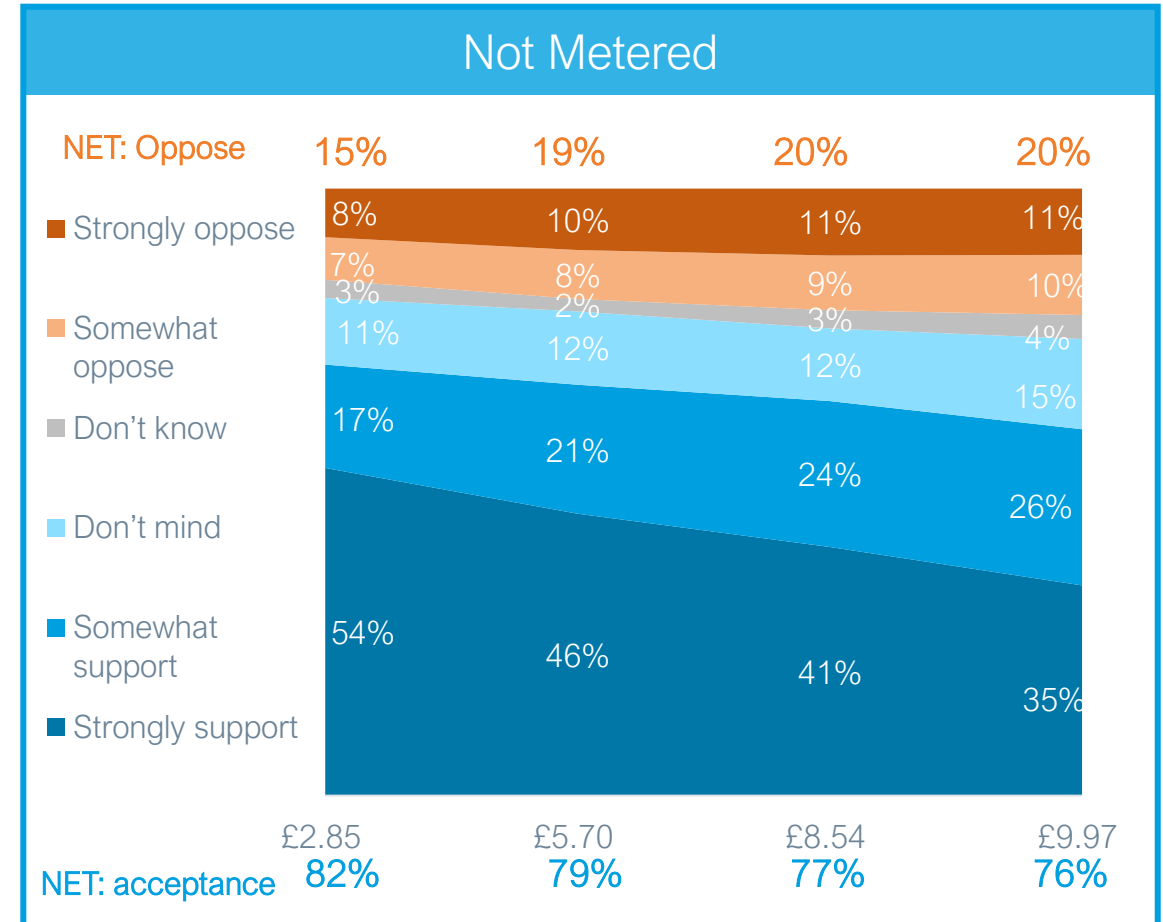
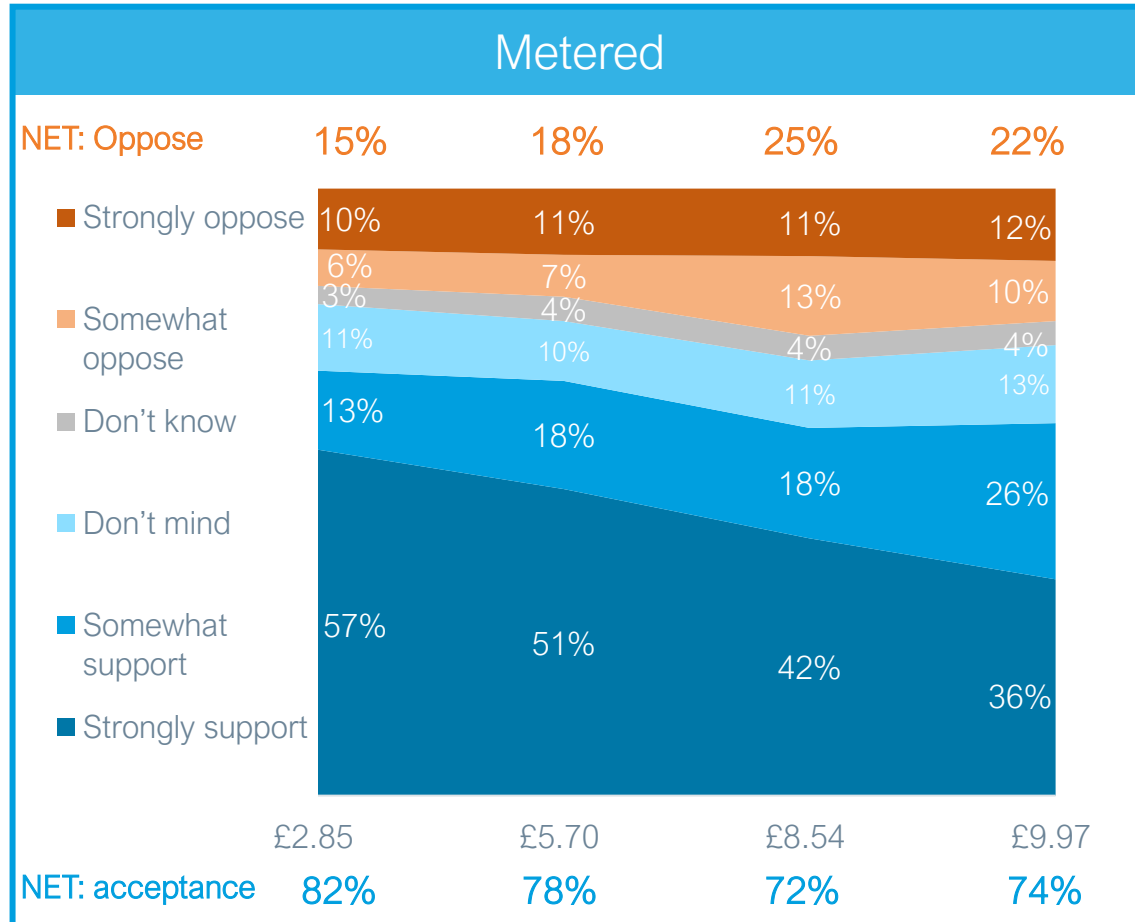
Acceptance of cross subsidy: Disability vs. No disability



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); Disability (n=177), No disability (n=535)

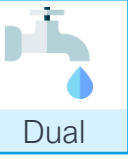
*Acceptance is the NET of strongly support, somewhat support and don't mind

Acceptance of cross subsidy: Metered vs. Not metered

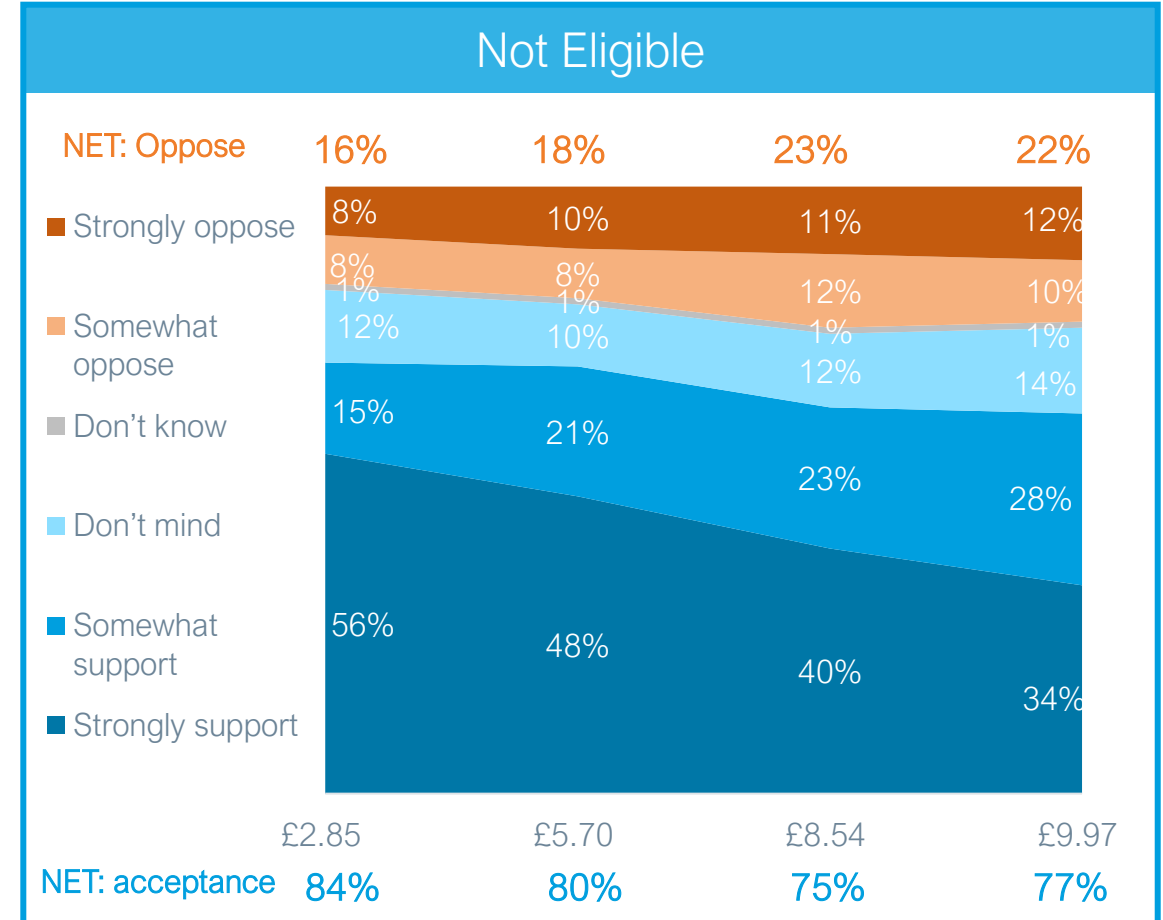
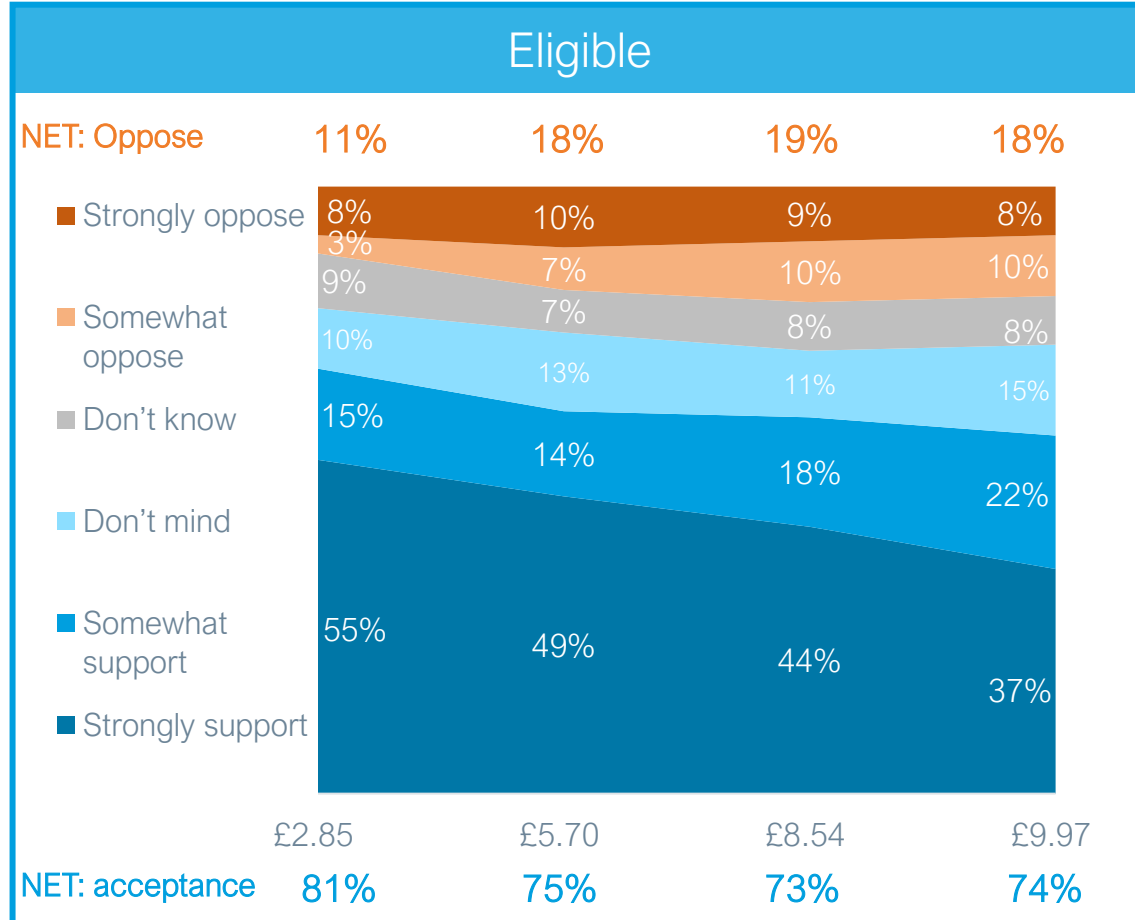


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); Metered (n=366), Not metered (n=355)

*Acceptance is the NET of strongly support, somewhat support and don't mind



Acceptance of cross subsidy: Eligible vs. Not Eligible



Social Tariffs, Quantitative Survey, August to September 2022.

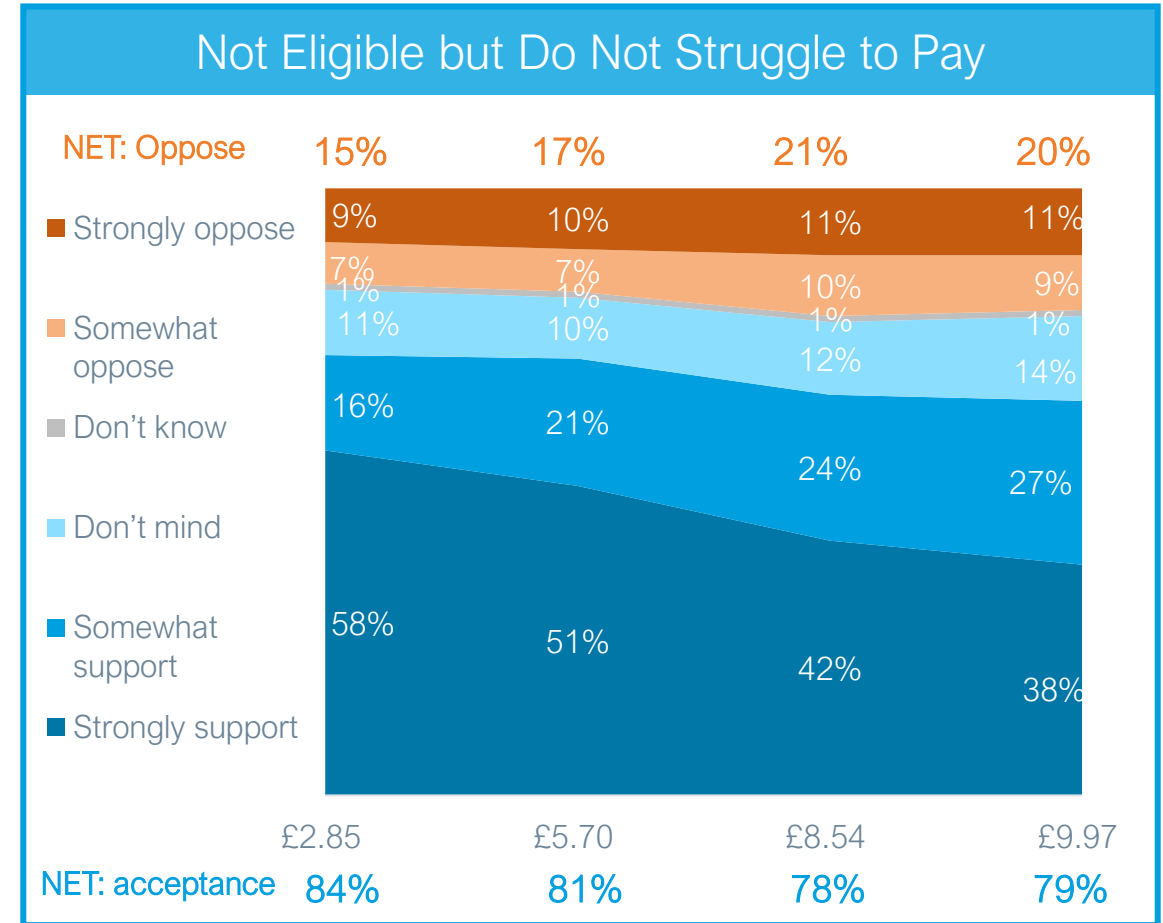
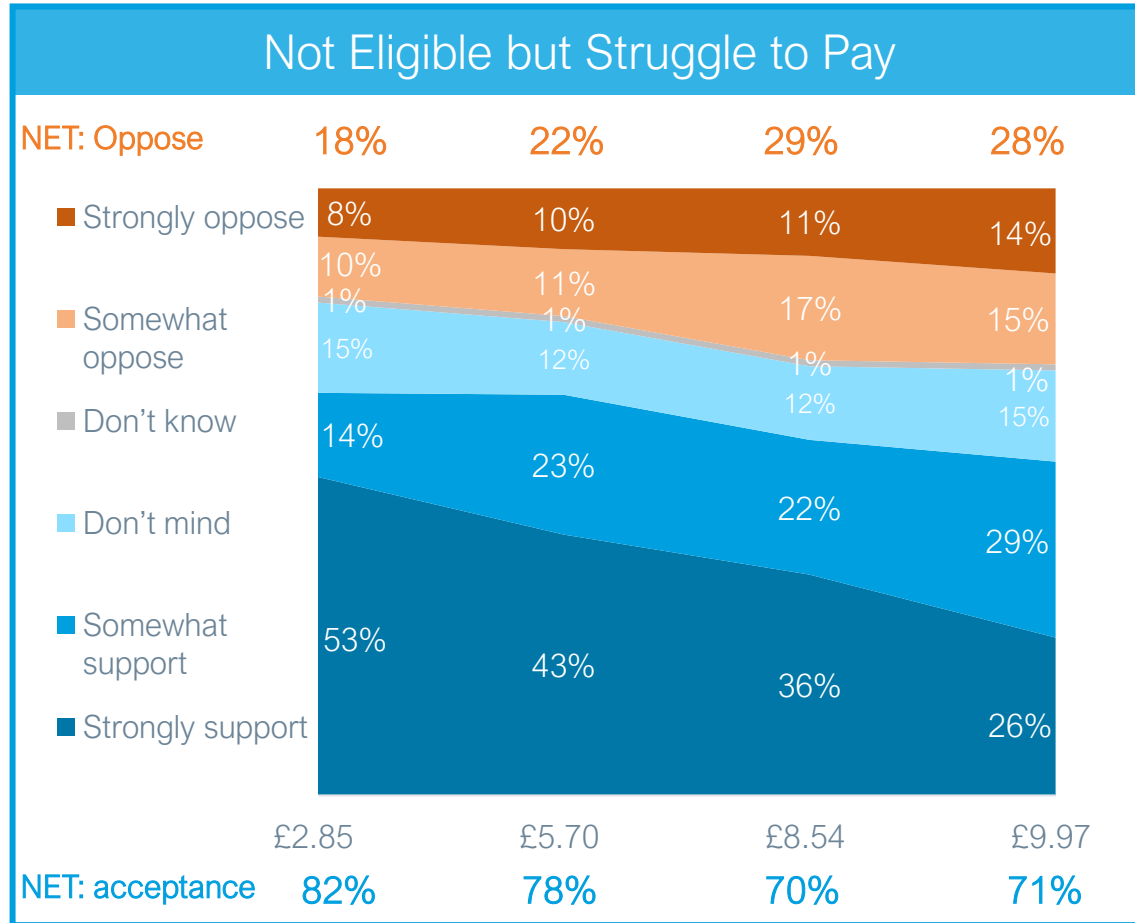
Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional.... towards helping these low-income customers.

Base: Dual customers (n=721); Eligible (n=183), Not eligible (n=492)

*Acceptance is the NET of strongly support, somewhat support and don't mind



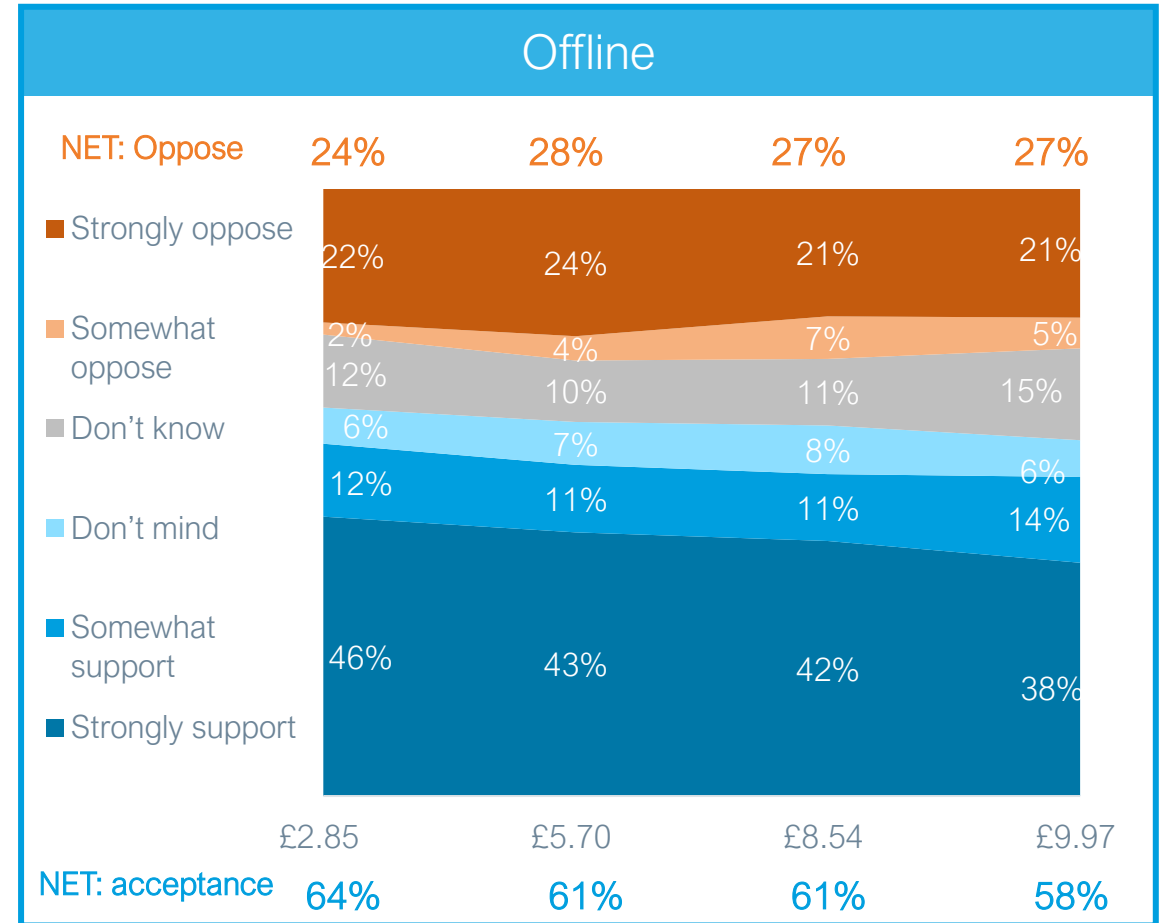
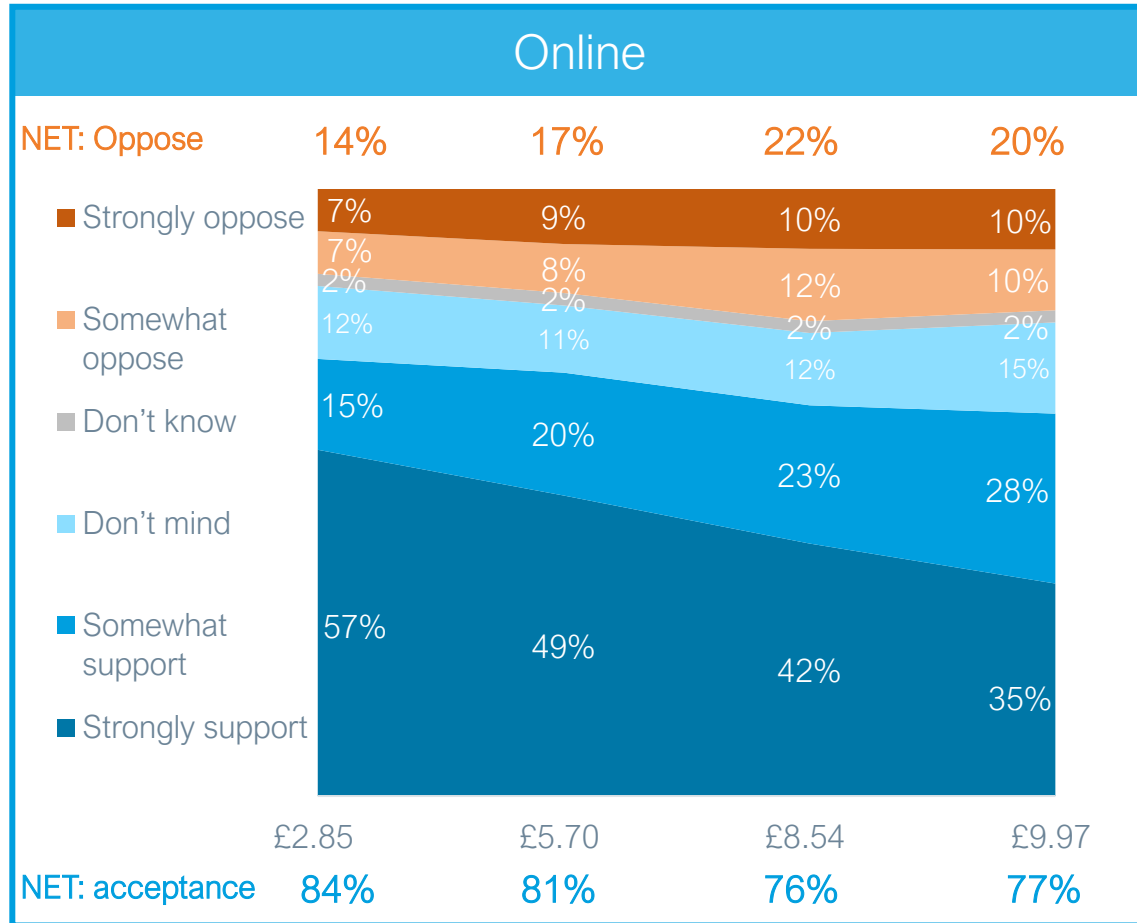
Acceptance of cross subsidy: Not Eligible but Struggle to Pay vs. Not Eligible but Do Not Struggle to Pay



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); Not Eligible but Struggle to pay (n=136), Not Eligible but Do Not Struggle to Pay (n=356)

*Acceptance is the NET of strongly support, somewhat support and don't mind

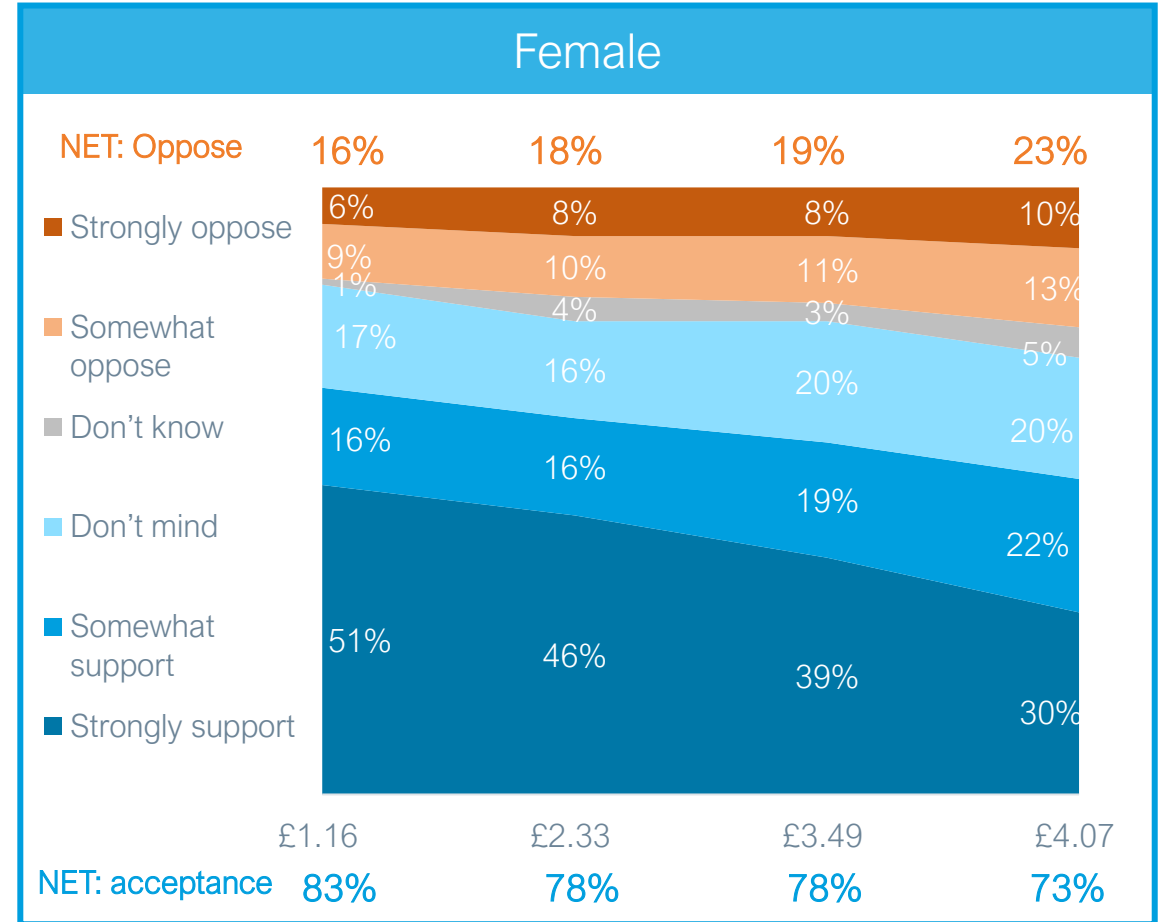
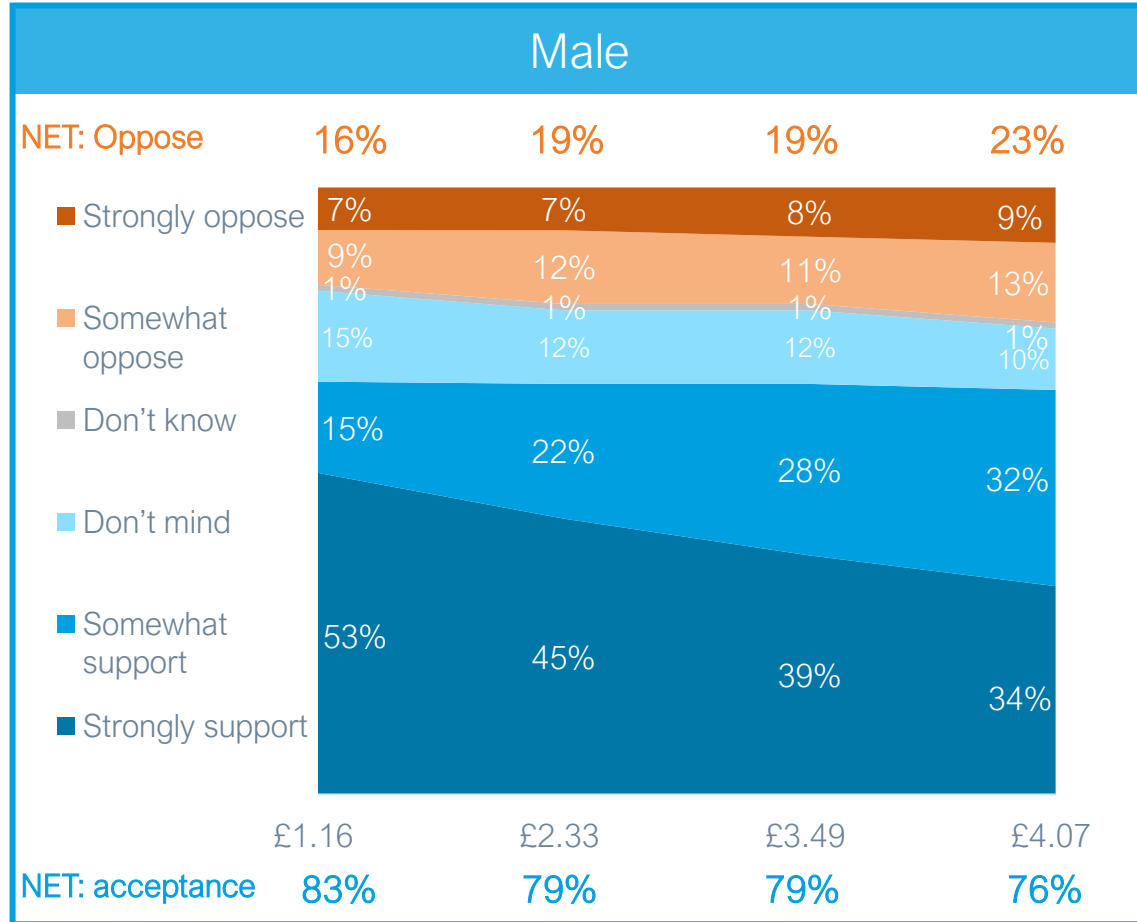
Acceptance of cross subsidy: Online vs. Offline customers



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Dual customers (n=721); Online (n=621), Offline (n=100)

*Acceptance is the NET of strongly support, somewhat support and don't mind

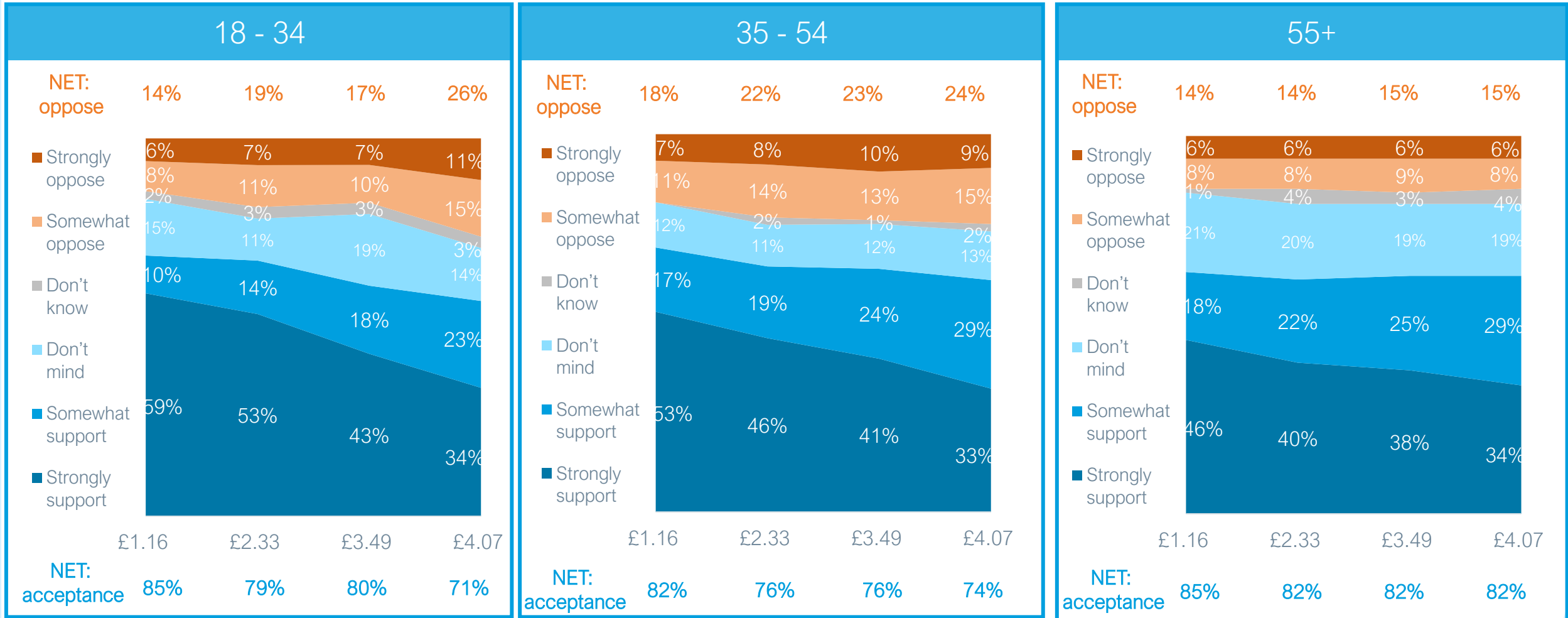
Acceptance of cross subsidy: Male vs. Female customers



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); Male (n=169), Female (n=206)

*Acceptance is the NET of strongly support, somewhat support and don't mind

Acceptance of cross subsidy: Customers of Different Ages

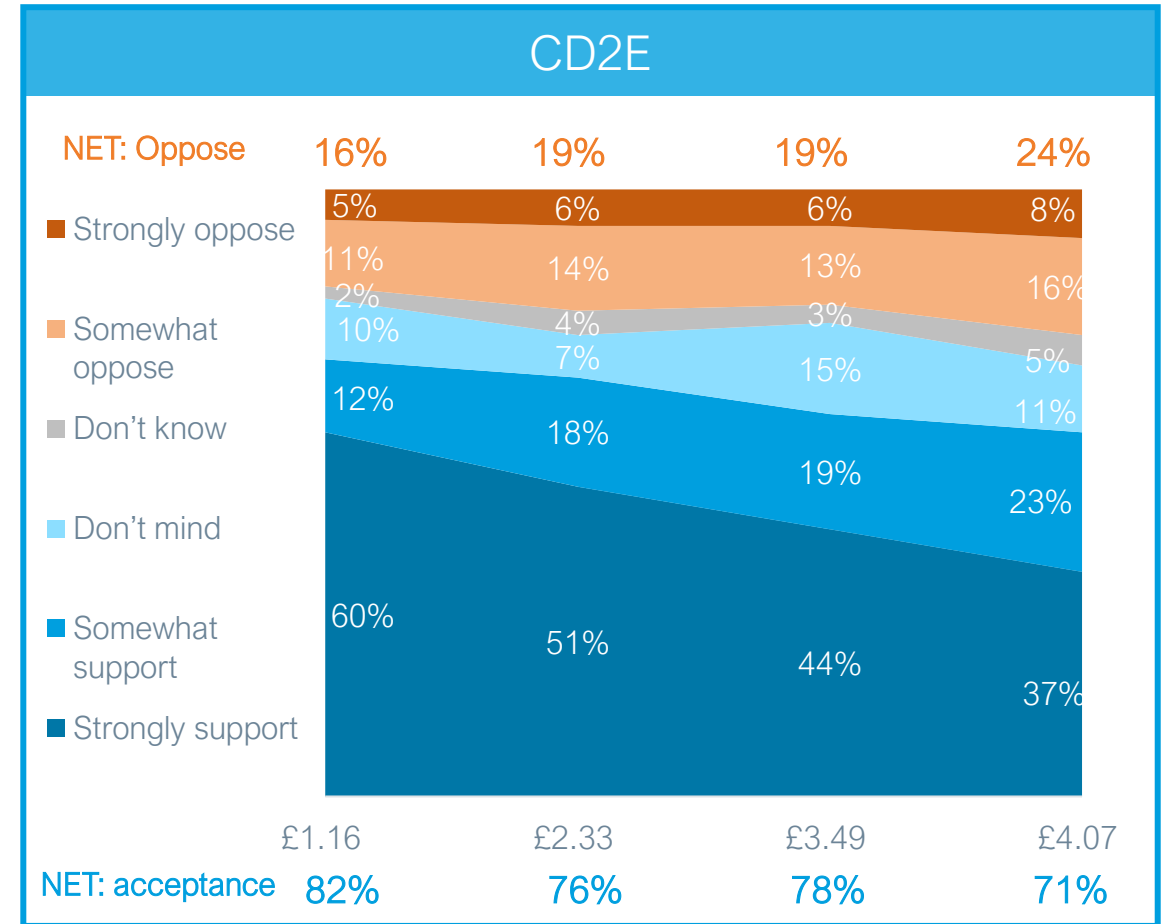
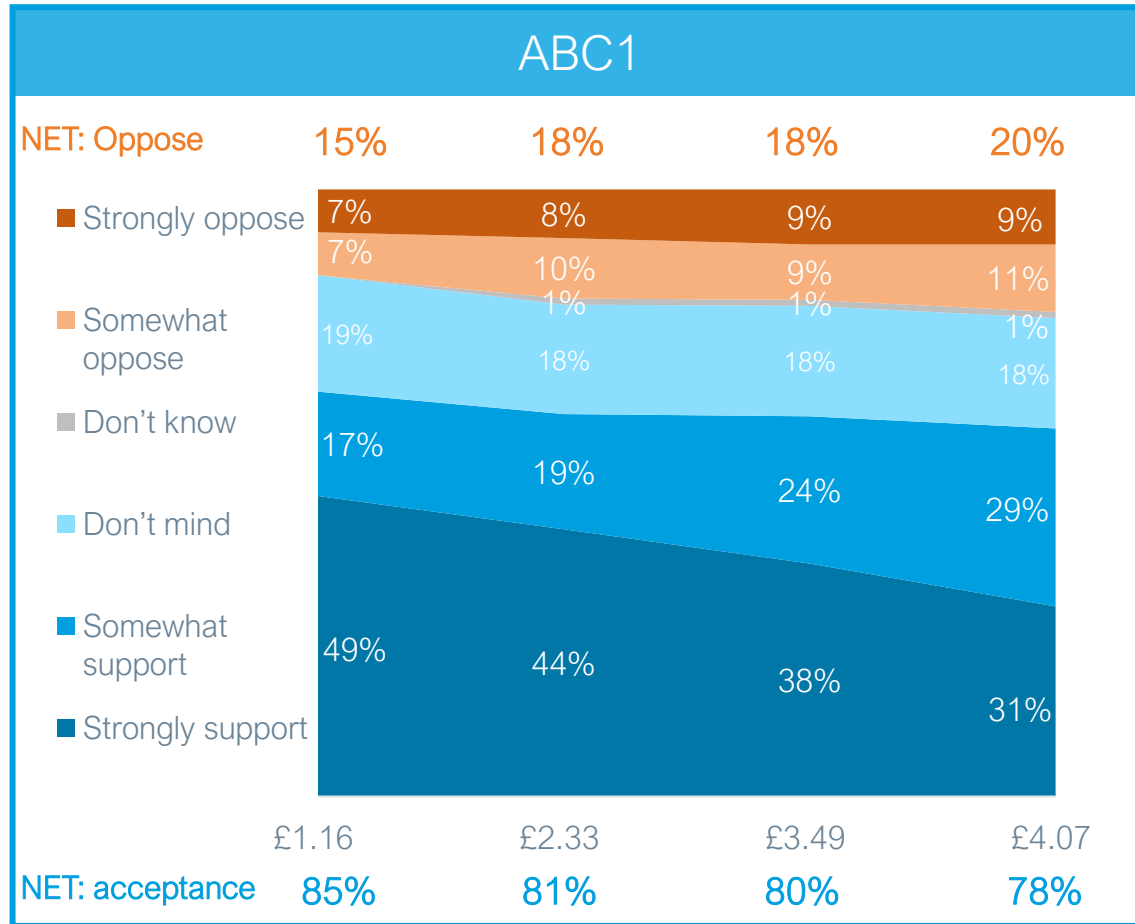


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); 18-34 (n=134), 35 - 54 (n=144), 55+ (n=101)

*Acceptance is the NET of strongly support, somewhat support and don't mind



Acceptance of cross subsidy: ABC1 vs. CD2E customers

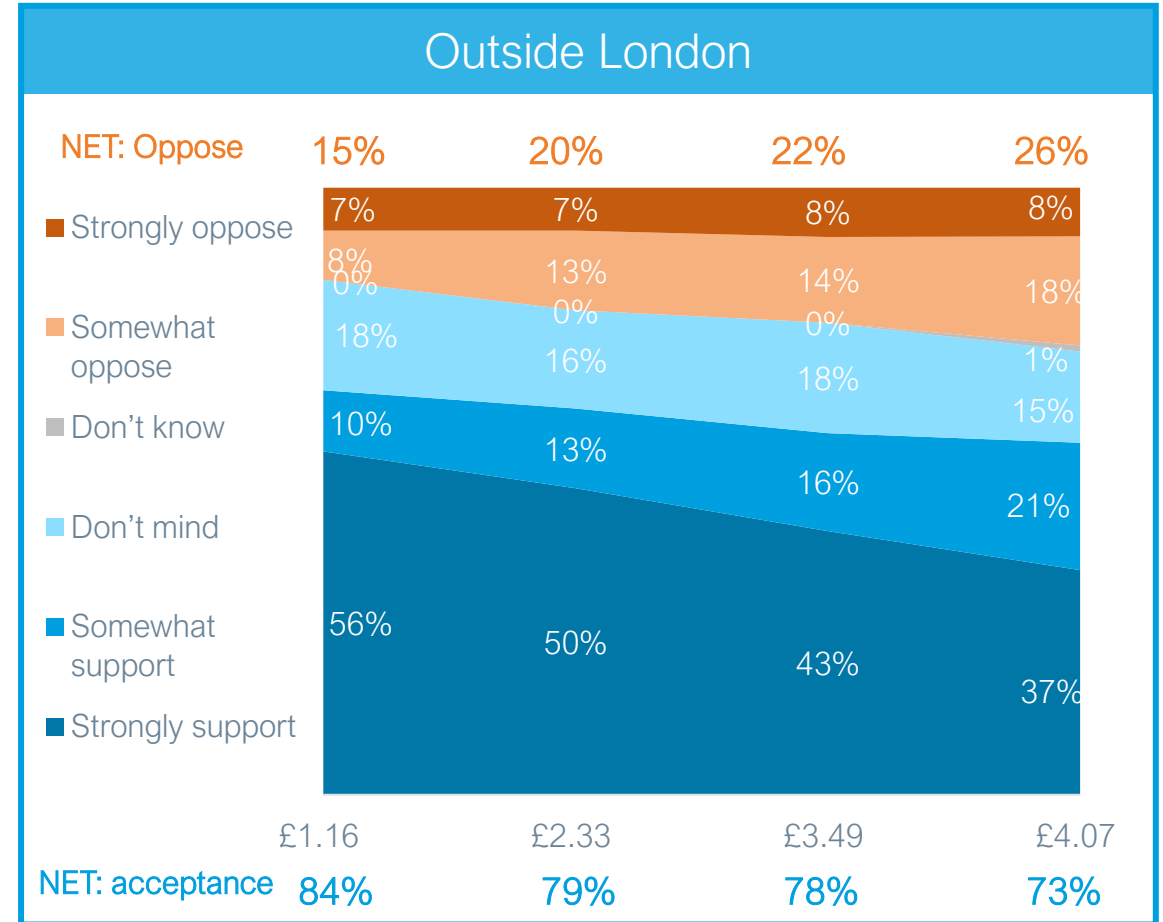
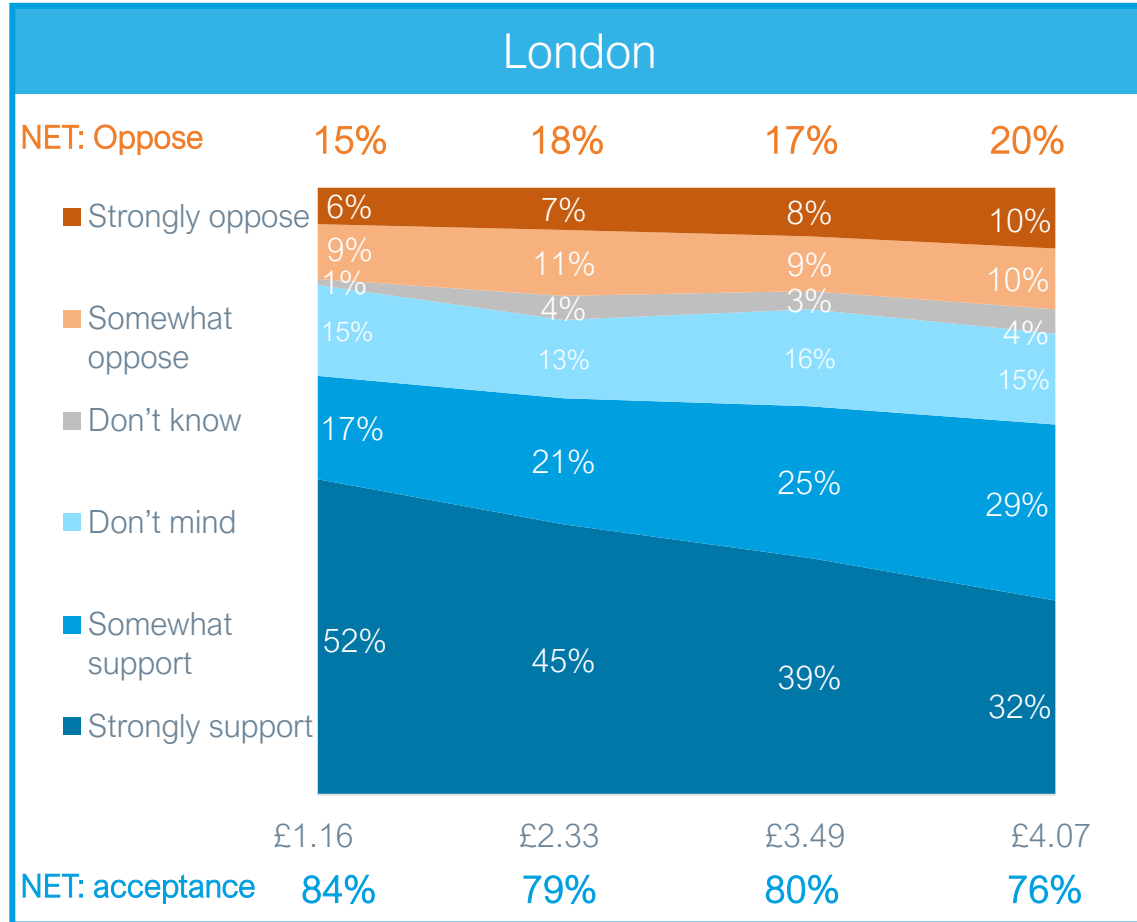


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); Male (n=231), Female (n=148)

*Acceptance is the NET of strongly support, somewhat support and don't mind



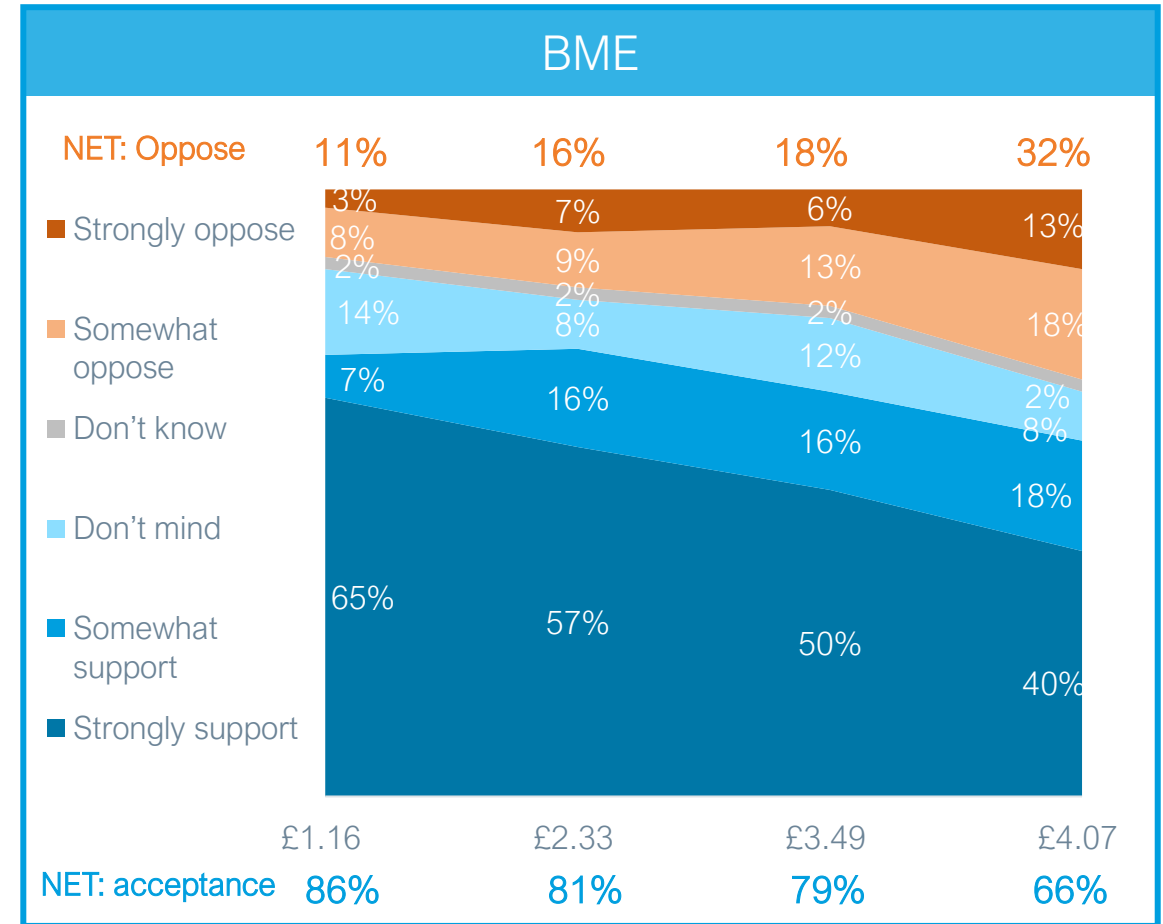
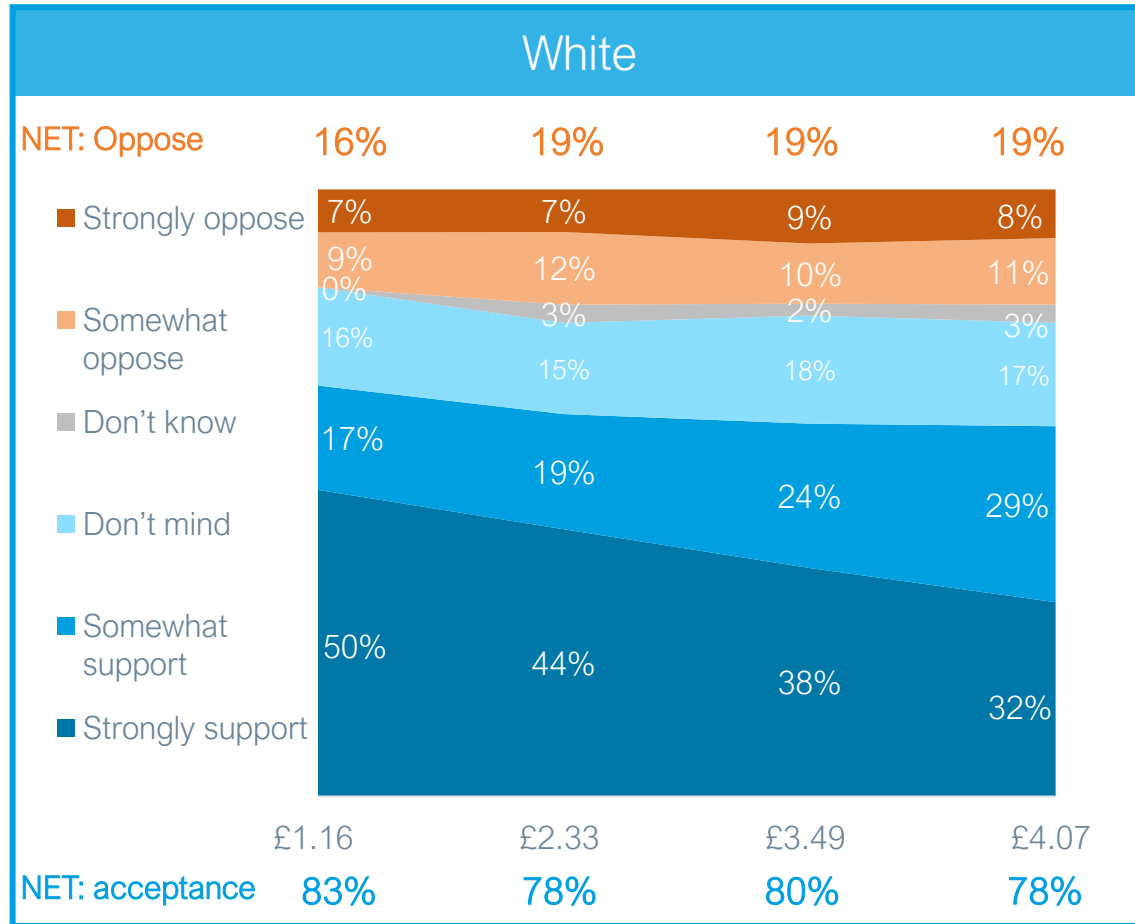
Acceptance of cross subsidy: London vs. Outside London



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional... towards helping these low-income customers.
 Base: Wastewater only (n=379); London (n=257), Outside London (n=122)

*Acceptance is the NET of strongly support, somewhat support and don't mind

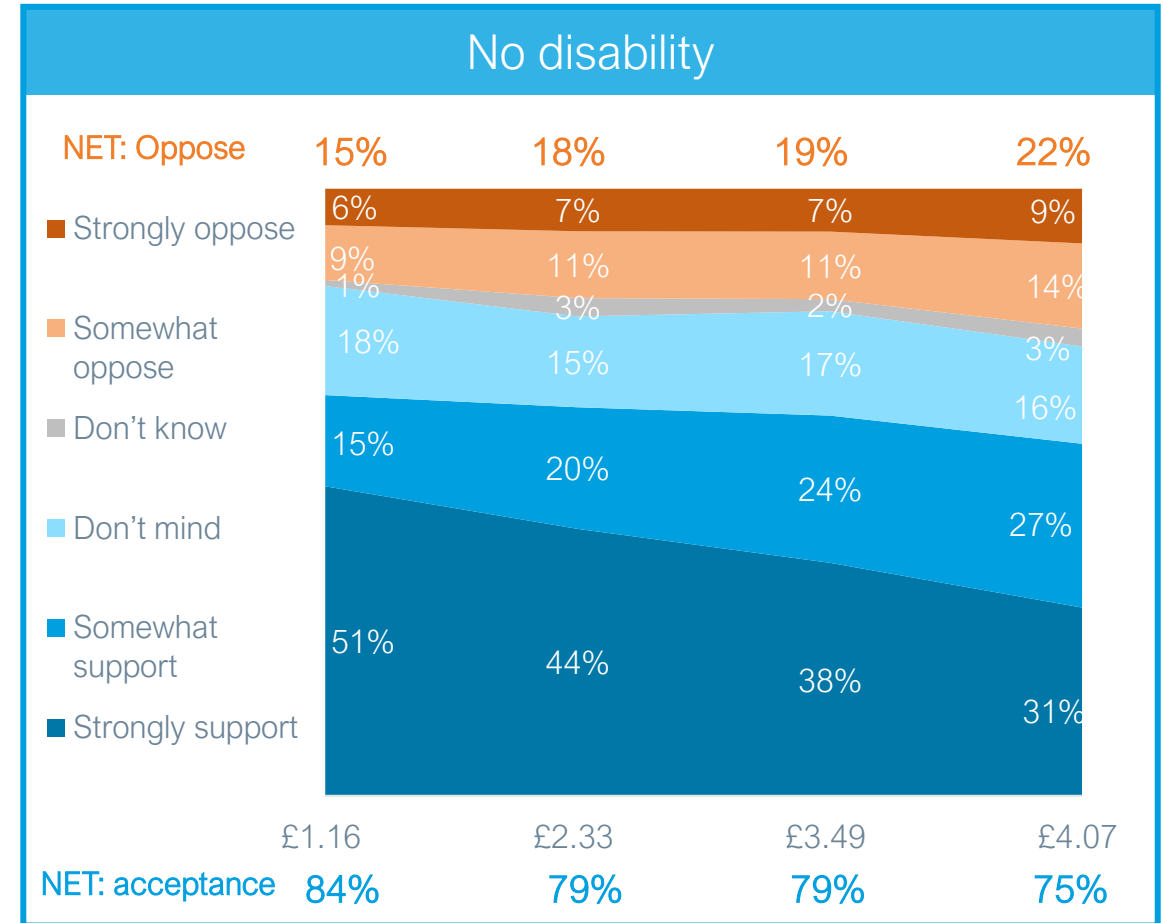
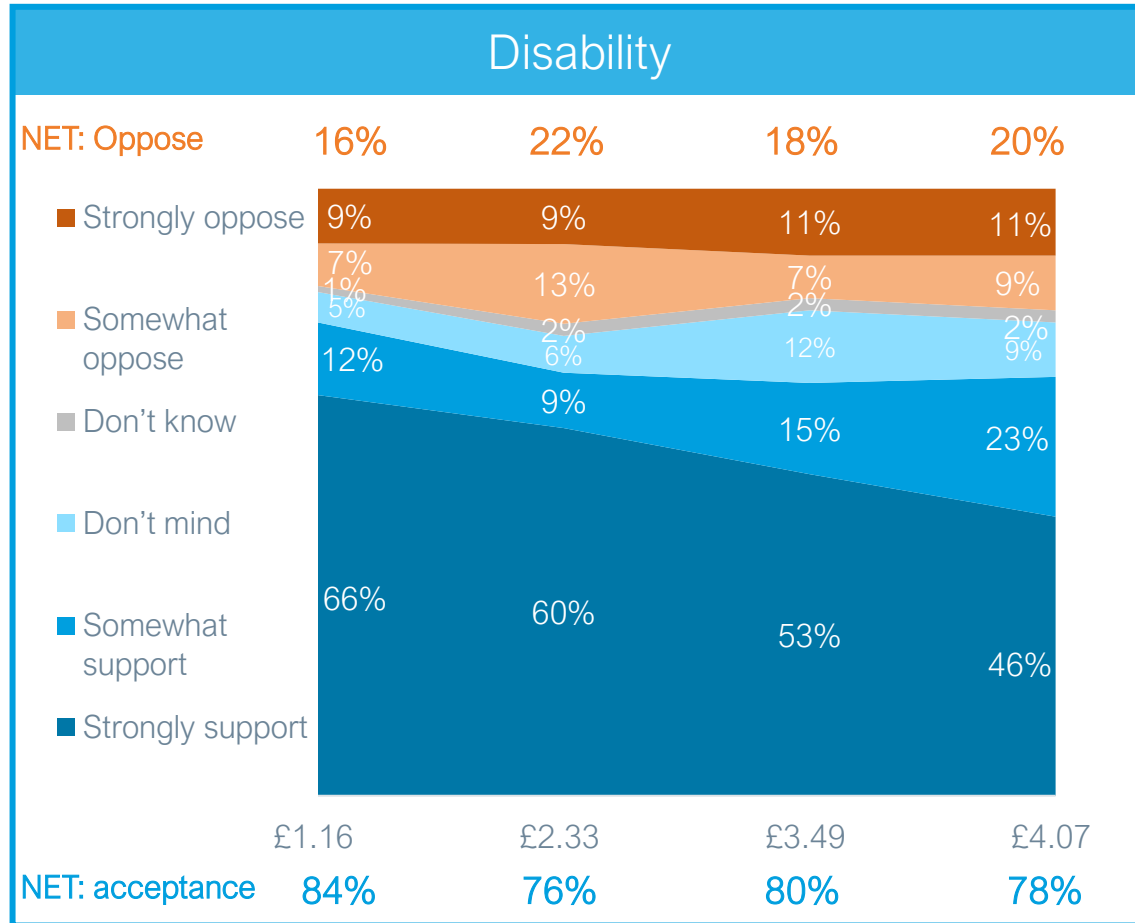
Acceptance of cross subsidy: White vs. BME customers



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); White (n=320), BME (n=58)

*Acceptance is the NET of strongly support, somewhat support and don't mind

Acceptance of cross subsidy: Disability vs. No disability

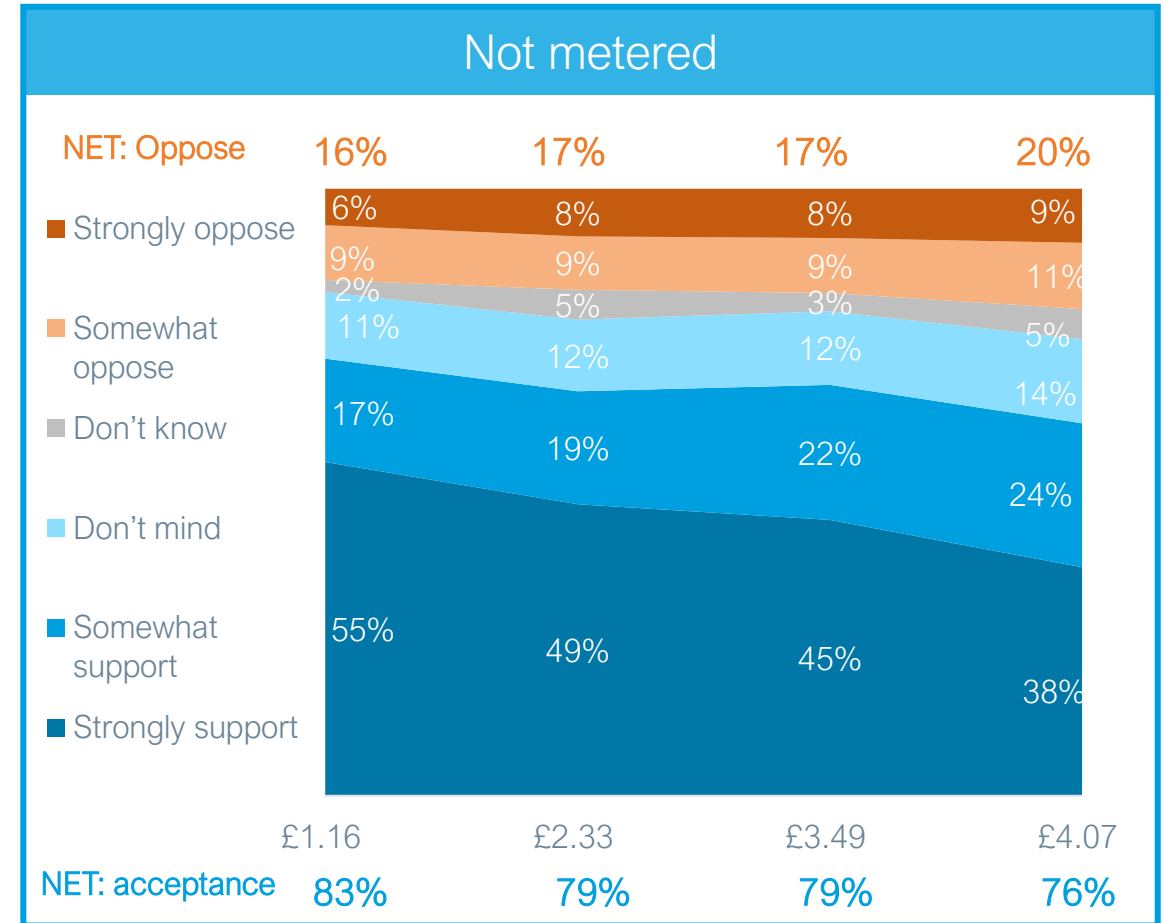
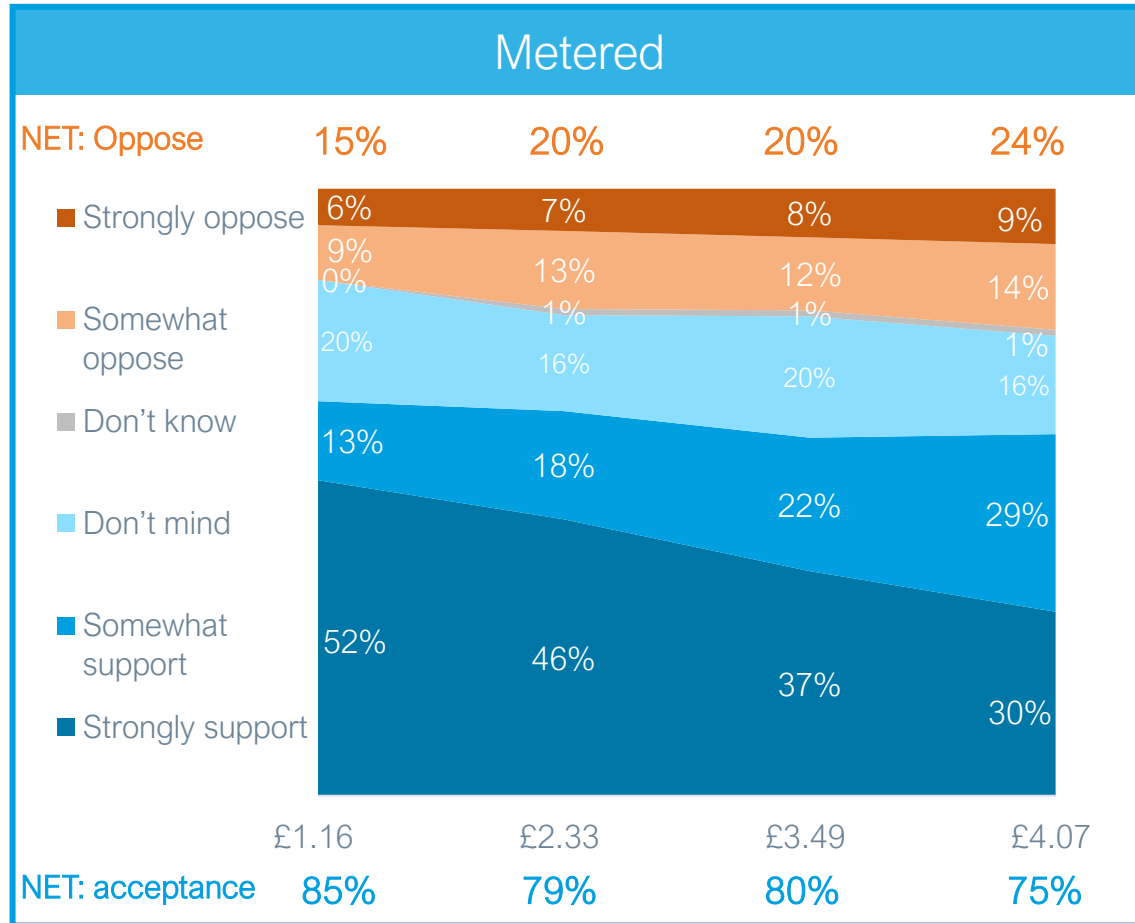


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional... towards helping these low-income customers.
 Base: Wastewater only (n=379); Disability (n=108), No disability (n=271)

*Acceptance is the NET of strongly support, somewhat support and don't mind



Acceptance of cross subsidy: Metered vs. Not metered

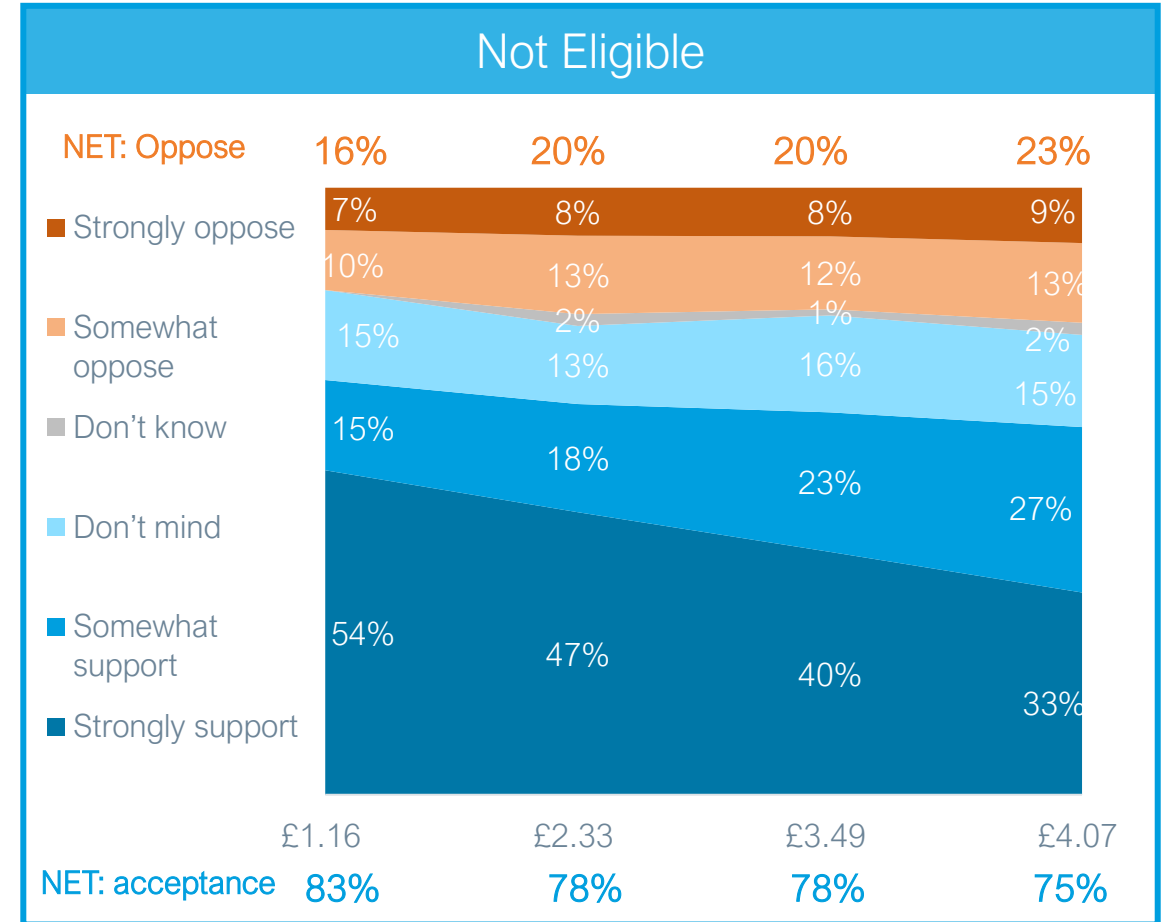
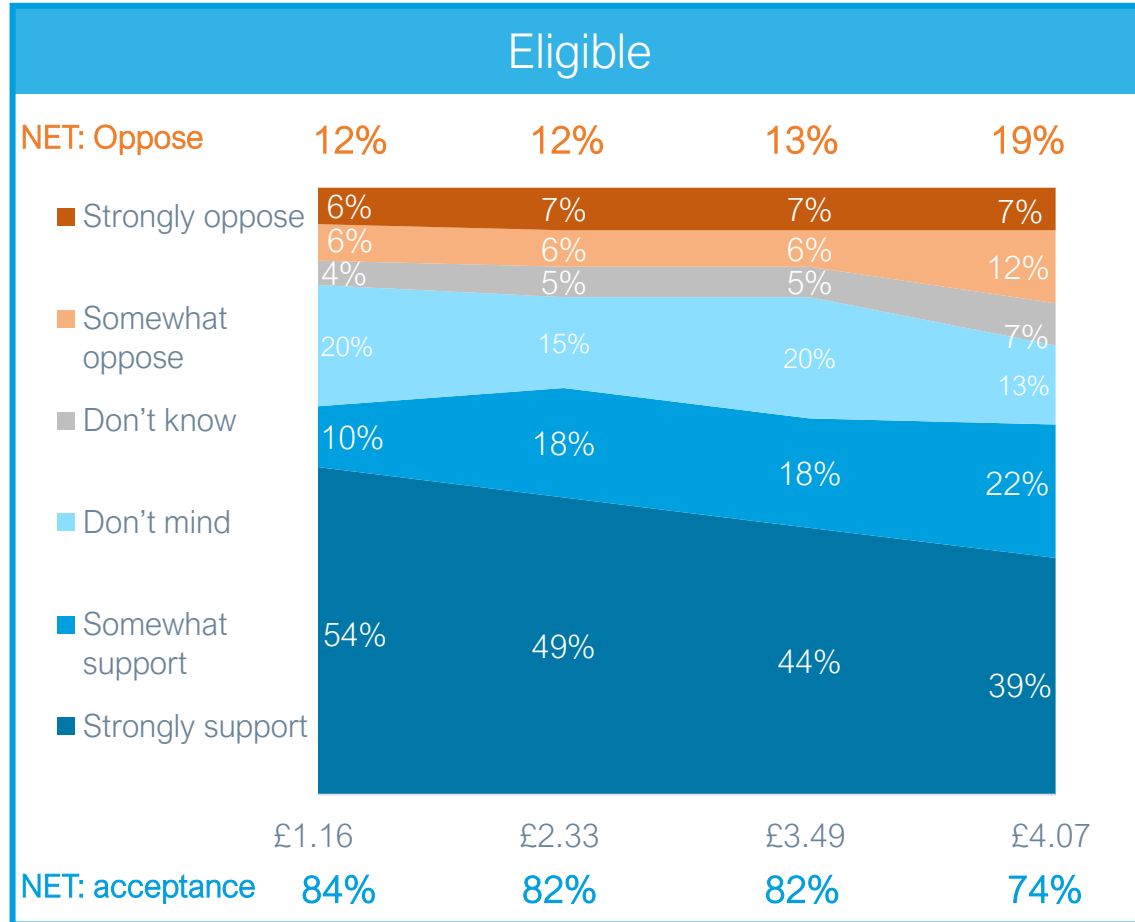


Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); Metered (n=199), Not metered (n=180)

*Acceptance is the NET of strongly support, somewhat support and don't mind



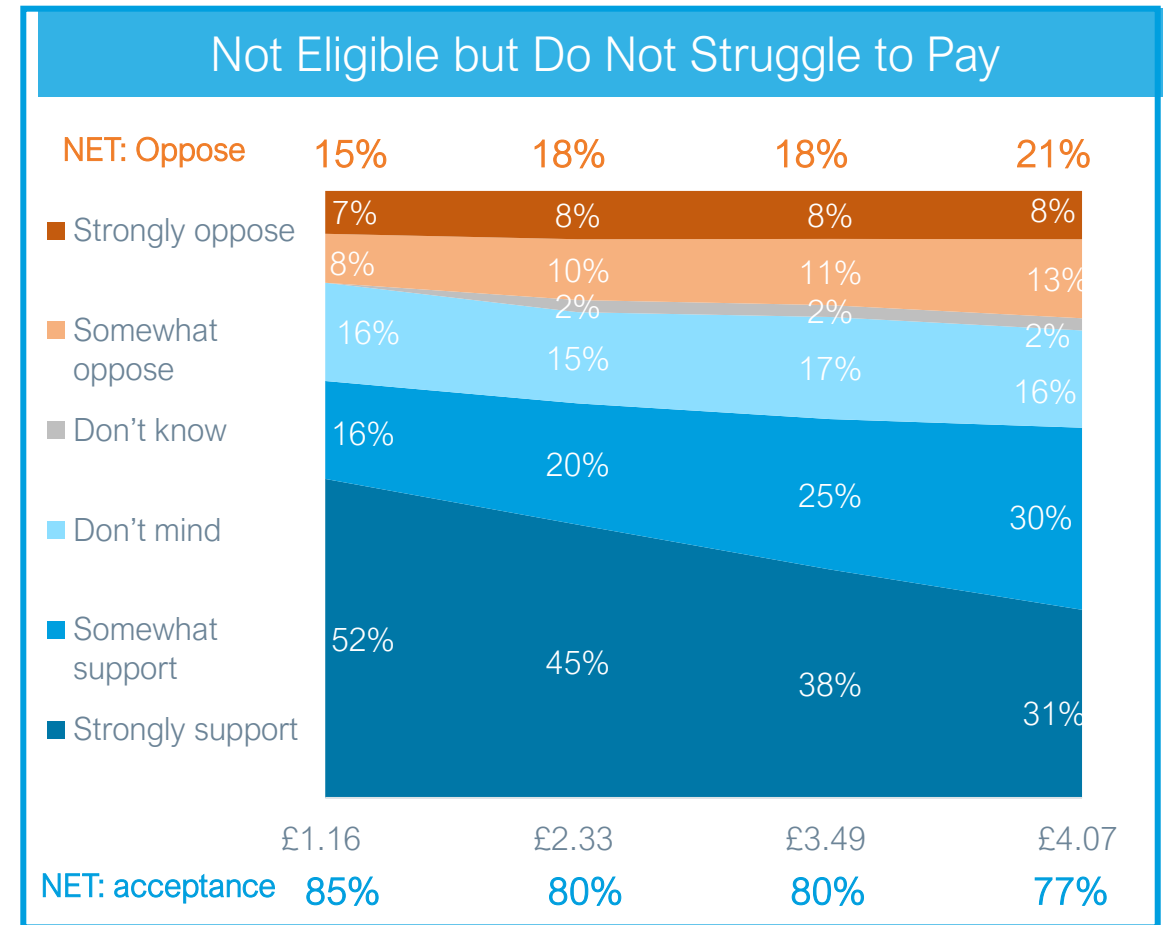
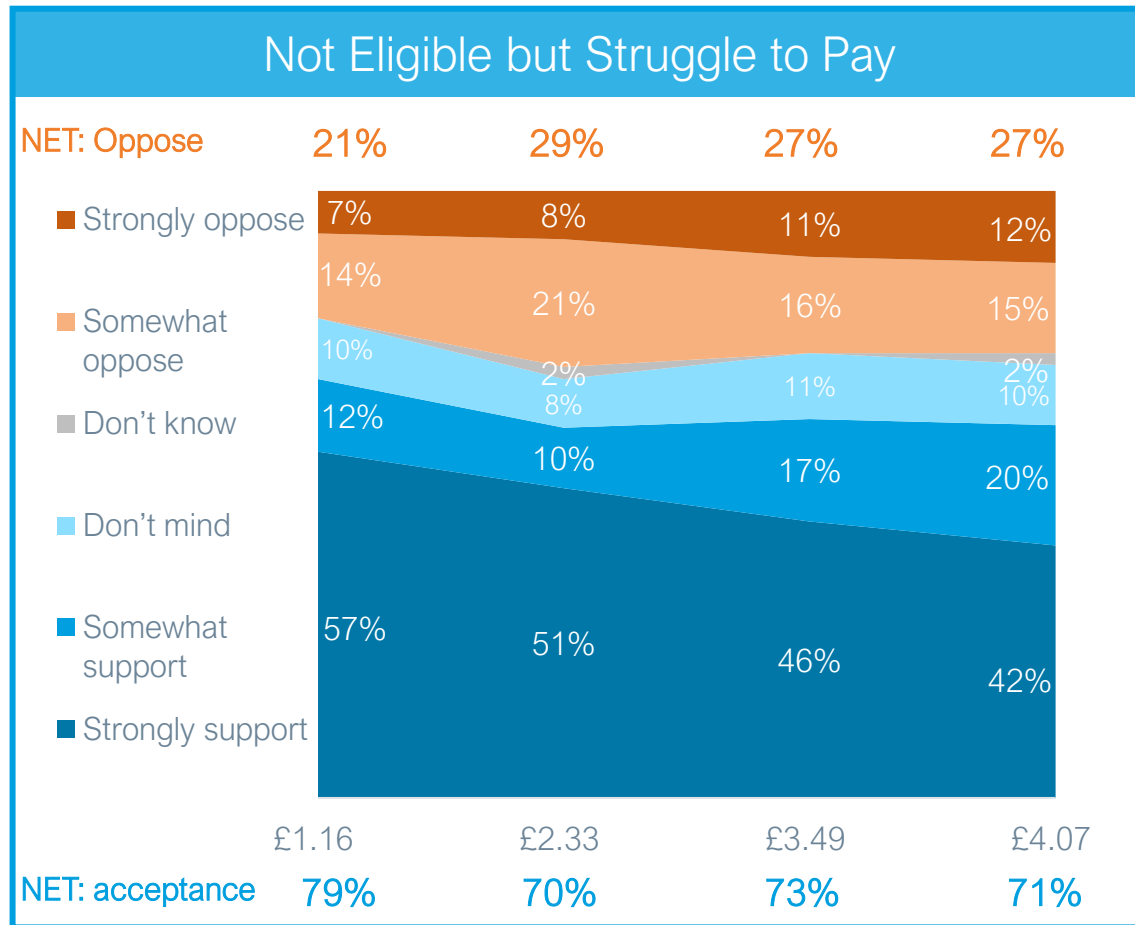
Acceptance of cross subsidy: Eligible vs. Not Eligible



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional....towards helping these low-income customers.
 Base: Wastewater only (n=379); Eligible (n=71), Not Eligible (n=303)

*Acceptance is the NET of strongly support, somewhat support and don't mind

Acceptance of cross subsidy: Not Eligible but Struggle to Pay vs. Not Eligible but Do Not Struggle to Pay



Social Tariffs, Quantitative Survey, August to September 2022.
 Q15 – Q18. How far would you support or oppose a discounted rate which would help 175,000 / 150,000 / 100,000 / 50,000 additional households who are struggling to pay water & wastewater bills? All customers would pay up to an additional... towards helping these low-income customers.
 Base: Wastewater only (n=379); Not Eligible but Struggle to pay (n=72); Not Eligible, but **don't** struggle to pay (n=231)

*Acceptance is the NET of strongly support, somewhat support and don't mind

Questionnaire





ASK ALL CATI RESPONDENTS.

Q0a. Before we begin, we have a couple of questions to check whether this survey is relevant to you. Do you or does anyone in your household have access to the internet at home (via any device, e.g. PC, mobile phone, etc.)?

SINGLE CODE. DO NOT READ OUT

1. I have access to the internet and use it at home
2. I have access to the internet, but don't use it at home
3. I do not have internet access at home
4. Don't know

ASK ALL CATI RESPONDENTS WHO CODE 1 OR 2 AT Q0a.

Q0b. Which, if any, of these activities do you do online?

MULTI CODE. RANDOMISE. READ OUT 1-12

1. Online banking or paying bills online (e.g. transferring money between accounts, managing mortgage or other payments, checking or paying bills)
2. Pay online for your council tax or for another local council service (e.g. parking ticket, congestion charge etc.)
3. Look online for public services information on government sites (e.g. gov.uk/ ni.direct or HMRC)
4. Finding/ downloading information for work/ business/ school/ college/ university
5. Look at job opportunities or apply for a job online
6. Find information for your leisure time including cinema, live music, theatre, museums etc.
7. Complete government processes online (e.g. update Universal Credit, renew a driving licence or passport etc.)
8. Sign an online petition or use a campaigning website (e.g. change.org)
9. Use streamed audio services (e.g. Spotify or Deezer or Apple Music)
10. Listen to live, catch-up or on-demand radio through a website or app (e.g. BBC Sounds, RadioPlayer)
11. Watch TV programmes/ films/ content online (e.g. Netflix, BBC iPlayer, or Sky Go)
12. Watch or post livestream videos (these let you watch or post videos 'live' at exactly the same time as they are being made) on sites or apps like YouTube Live, Instagram Live or Facebook Live
13. None of these **HOLD. EXCLUSIVE**

SCREENOUT IF CODE 1 OR 2 AT Q0A AND SELECT MORE THAN 4 CODES AT Q0B. EVERYONE ELSE ALLOWED THROUGH THE SURVEY.

NOTE TO SCRIPTING – PLEASE CREATE THE FOLLOWING VARIABLES:

- 'NARROW INTERNET USER' = LESS THAN 5 CODES SELECTED AT Q0B
- 'DIGITALLY EXCLUDED' = CODE 3 OR 4 AT Q0A



ASK ALL ONLINE SAMPLE [CATI TO INFER AT THE END OF THE INTERVIEW]

Q1. Are you..?

SINGLE CODE

1. Male
2. Female
3. Other gender category
4. Prefer not to say

ASK ALL

Q2. How old are you?

[NUMERIC BOX]

NOTE TO SCRIPTING – PLEASE CREATE THE FOLLOWING VARIABLES:

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

SCREEN OUT IF YOUNGER THAN 18:

Thanks for your interest in taking part in the survey, however unfortunately we're only looking to speak to people aged 18 or over.

ASK ALL

IF OUTSIDE OF THAMES WATER SUPPLY AREA AND POSTCODE NOT ON LIST screenout

Q3. Please can you share your postcode. We only use this to validate the region you live in to ensure we're speaking to the correct people we need for this survey. Please put a space between the first group and the second group, e.g. AB1 2CD.

[OPEN TEXT BOX. FORCE POSTCODE FORMAT WITH 'PREFER NOT TO SAY' OPTION]

SCREENOUT IF SELECT 'PREFER NOT TO SAY'

V:\1. Client\1. Existing Clients\Thames Water\1. Setup & Management\2. Community Set-Up\5. Recruitment\Postcode databases

[USE MASTER POSTCODES_SERVICE AND WRZ FILE TO CREATE THE FOLLOWING VARIABLES]

SERVICE TYPE

1. CLEAN & WASTE
2. WASTE ONLY

WRZ

VERVE



1. GUILDFORD
2. HENLEY
3. KENNET VALLEY
4. LONDON
5. SLOUGH/WYCOMBE/AYLESBURY
6. SWINDON/OXFORD (IF "SWOX")
7. NO WRZ

NON WRZ AREA

1. AFFINITY WATER
2. ANGLIAN WATER
3. BRISTOL WATER
4. CAMBRIDGE WATER
5. ESSEX & SUFFOLK WATER
6. MID KENT WATER
7. SEVERN TRENT WATER
8. SOUTH EAST WATER
9. SOUTHERN WATER
10. SUTTON & EAST SURREY WATER
11. WESSEX WATER
12. WRZ AREA

SCREENOUT TEXT:

Thanks for your interesting in taking part in this survey. Unfortunately we're only looking to speak to people based in specific geographic locations at this time.

ASK ALL

Q4. Are you the person responsible for paying your water and wastewater (sewerage) bill (this may be included in your rent)? Please select the most relevant option.

SINGLE CODE. DO NOT READ OUT

1. Yes, solely responsible
2. Yes, jointly responsible
3. Not responsible **SCREENOUT**
4. Don't know **SCREENOUT**

SCREENOUT TEXT:

Thanks for your interest in taking part in this survey. However unfortunately we're only looking to speak to those who are responsible for paying for their water and wastewater bill.

VERVE



ASK ALL

Q5. The Chief Income Earner is the person with the largest income, whether from employment, pensions, state benefits, investments or any other source. If two or more related people in the household have equal income, please think of this question with the oldest in mind. The Chief Income Earner can be of either sex, with no preference to either.

Which of the following best describes the occupation of the Chief Income Earner in your household?

SINGLE CODE. READ OUT

1. Semi or unqualified / trainee manual worker (e.g. manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant)
2. Skilled Qualified / professional manual worker (e.g. skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, AA patrolman, pub/bar worker etc.)
3. Supervisory or clerical/junior managerial/professional/administrative (e.g. office worker, student doctor, foreman with 25+ employees, salesperson, etc.)
4. 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)
5. Higher managerial/professional/administrative (e.g. established doctor, solicitor, board director in a large organisation (200+ employees, top level civil servant/public service employee))
6. Student
7. Casual worker – not in permanent employment
8. Homemaker e.g. housewife, househusband etc
9. Retired and living on state pension
10. Retired and living on private pension
11. Unemployed or not working due to long-term sickness
12. Full-time carer of other household member
13. Other

NOTE TO SCRIPTING: CREATE SOCIAL GRADE VARIABLE

SEG1

1. AB - IF A = CODE 5 SELECTED / B = CODE 4 SELECTED
2. C1 – IF C1 CODE 3, 10 OR 6 SELECTED
3. C2 – IF C2 = CODE 2 SELECTED
4. DE – IF D = CODE 1 SELECTED / E = CODE 7 – 9 OR 11 – 13 SELECTED

SEG2

1. ABC1 (A = CODE 5 SELECTED / B = CODE 4 SELECTED / C1 = CODE 3, 10 OR 6 SELECTED)
2. C2DE (C2 = CODE 2 SELECTED / D = CODE 1 SELECTED / E = CODE 7 – 9 OR 11 – 13 SELECTED)



ASK ALL

Q6. Which ethnic group do you consider you belong to?

SINGLE CODE. DO NOT READ OUT, PROBE TO PRE-CODES

Asian or Asian British (TITLE ONLY)

1. Indian
2. Pakistani
3. Bangladeshi
4. Any other Asian background (please specify) **[OPEN]**

Black (TITLE ONLY)

5. Black British
6. Black Caribbean
7. Black African
8. Any other black background (please specify) **[OPEN]**

Chinese (TITLE ONLY)

9. Chinese
10. Any other Chinese background (please specify) **[OPEN]**

Mixed Race (TITLE ONLY)

11. White and Black Caribbean
12. White and Black African
13. White and Asian
14. Any other mixed background (please specify) **[OPEN]**

White (TITLE ONLY)

15. White British
16. White Irish
17. Any other white background (please specify) **[OPEN]**

18. Other (please specify) **[OPEN]**

CREATE ETHNICITY VARIABLE

1. **WHITE: IF Q6 = 15-17**
2. **BME: IF Q6 = 1-14 OR 18**



ASK ALL

Q7. Do you consider yourself to be officially disabled defined by the Equality Act 2010 as 'A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day-to-day activities'? If yes, which of the following disabilities do you consider yourself to have? Please select all that apply.

MULTI CODE. RANDOMISE. READ OUT

1. Visual disability
2. Hearing disability
3. Mobility disability
4. Learning disability
5. Mental health condition
6. Chronic illness
7. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
8. Other, please specify
9. I do not have any of these conditions or disabilities **EXCLUSIVE**

ASK ALL

Q8a. What is the combined gross income of your household? By this we mean how much money do all the people in your household have coming in, before Tax and National insurance deductions. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit)

SINGLE CODE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Up to £8,000 a year / up to £670 a month / up to £155 a week
2. £8,001 - £16,480 a year / £671 - £1,373 a month / £156 - £317 a week
3. £16,481 - £20,111 a year / £1,374 - £1,676 a month / £318 - £387 a week
4. £20,112 - £30,000 a year / £1,676 - £2,500 a month / £387 - £580 a week
5. £30,001 - £40,000 a year / £2,501 - £3,300 a month / £581 - £770 a week
6. £40,001 - £50,000 a year / £3,301 - £4,100 a month / £771 - £960 a week
7. £50,001 - £70,000 a year / £4,101 - £5,800 a month / £961 - £1,345 a week
8. £70,001 - £100,000 a year / £5,801 - £8,300 a month / £1,346 - £1,920 a week
9. More than £100,000 a year / more than £8,300 a month / more than £1,920 a week
10. Prefer not to say

NOTE TO SCRIPTING – PLEASE CREATE THE FOLLOWING VARIABLE BASED ON 'ELIGIBLE FOR TARIFF'

1. **'ELIGIBLE FOR TARIFF' = Q3 WRZ = 4 OR NON WRZ =1,10 AND Q8a = 1-3 OR Q3 WRZ = 1-3,5-6 OR NON WRZ =2-9,11,12 AND Q8a = 1 or 2**
2. **'NOT ELIGIBLE FOR TARIFF' = Q3 WRZ = 4 OR NON WRZ =1,10 AND Q8a = 4-9 OR Q3 WRZ 1-3,5-6 OR NON WRZ =2-9,11,12 AND Q8a = 3-9**



ASK IF CODE 1-3 (Up to £20,111) AT Q8a.

Q8b. You said your household's gross income is less than £20,111 a year. Would you be able to give us a more exact figure for the combined income of your household? Again, by this we mean how much money does your household have coming in before Tax and National Insurance deductions have been made. We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit)

SINGLE CODE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Up to £5,000 a year / up to £415 a month / up to £95 a week
2. £5,001 - £6,000 a year / £416 - £500 a month / £96 - £115 a week
3. £6,001 - £7,000 a year / £501 - £580 a month / £116 - £135 a week
4. £7,001 - £8,000 a year / £581 - £670 a month / £136 - £155 a week
5. £8,001 - £9,000 a year / £671 - £750 a month / £156 - £175 a week
6. £9,001 - £10,000 a year / £751 - £830 a month / £176 - £190 a week
7. £10,001 - £11,000 a year / £831 - £920 a month / £191 - £210 a week
8. £11,001 - £12,000 a year / £921 - £1,000 a month / £211 - £230 a week
9. £12,001 - £13,000 a year / £1,001 - £1,080 a month / £231 - £250 a week
10. £13,001 - £14,000 a year / £1,081 - £1,170 a month / £251 - £270 a week
11. £14,001 - £15,000 a year / £1,171 - £1,250 a month / £271 - £290 a week
12. £15,001 - £16,000 a year / £1,251 - £1,333 a month / £291 - £308 a week
13. £16,001 - £17,000 a year / £1,334 - £1,417 a month / £309 - £327 a week
14. £17,001 - £18,000 a year / £1,418 - £1,500 a month / £328 - £346 a week
15. £18,001 - £19,000 a year / £1,501 - £1,583 a month / £347 - £365 a week
16. £19,001 - £20,111 a year / £1,584 - £1,676 a month / £366 - £387 a week
17. Prefer not to say



ASK ALL

Q9. Which of the following is your main water service provider?

SINGLE CODE. RANDOMISE – SHOW COMPANY NAMES AND LOGOS

READ OUT

1. Affinity Water
2. Anglian Water
3. Cambridge Water
4. Essex and Suffolk Water
5. South East Water
6. Southern Water
7. Sutton and East Surrey Water
8. Thames Water
9. Wessex Water
10. Other (please specify) **HOLD**
11. Don't know **HOLD**

SCREENOUT IF NOT SELECTING THAMES WATER AND SERVICE TYPE = CLEAN & WASTE [Q3 = 'CLEAN & WASTE']

SCREENOUT TEXT:

Thanks for your interest in taking part in this survey. However unfortunately we're only looking to speak to customers from a specific water service provider and you don't fit our profile.

ASK WASTEWATER ONLY CUSTOMERS (Q3 SERVICE TYPE = WASTE ONLY) WHO DID NOT CODE THAMES WATER AT Q9. SHOW NAMES AND LOGOS

Q10. Which of the following companies provides the wastewater services at your home?

SINGLE CODE. RANDOMISE. DO NOT READ OUT

1. Affinity Water
2. Anglian Water
3. Cambridge Water
4. Essex and Suffolk Water
5. South East Water
6. Southern Water
7. Sutton and East Surrey Water
8. Thames Water
9. Wessex Water
10. Other (please specify) **HOLD**
11. Don't know **HOLD**

ONLY SHOW TO THOSE WHO DO NOT CODE THAMES WATER AT Q9 AND WHO DO NOT CODE THAMES WATER AT Q10.

Although **[INSERT ANSWER FROM Q9]** provides your clean water, Thames Water is responsible for the wastewater network for your home and a portion of your bill currently goes to Thames Water.



ASK ALL READ OUT

Q11. How do you pay your water and wastewater bill?

SINGLE CODE.

1. Directly to [INSERT COMPANY FROM Q9]
2. As part of your rent
3. As part of housing association fees
4. Through a service charge
5. Through benefits you may receive
6. Other
7. Don't know

ASK ALL

Q12. Approximately how much do you pay for your water and wastewater bill? Please do not include any arrears or debt repayments you may be making to your water and wastewater company.

Enter either the exact amount you pay per year, or choose from one of the options below.

DO NOT READ OUT, PROBE TO PRE-CODES

Exact amount per year (£) [NUMERIC BOX]

OR

- | | |
|----------------------------|----------------------|
| 1. Up to £12.99 per month | Up to £150 per year |
| 2. £13 - £16.99 per month | £151 - £200 per year |
| 3. £17 - £20.99 per month | £201 - £250 per year |
| 4. £21 - £24.99 per month | £251 - £300 per year |
| 5. £25 - £28.99 per month | £301 - £350 per year |
| 6. £29 - £32.99 per month | £351 - £400 per year |
| 7. £33 - £37.99 per month | £401 - £450 per year |
| 8. £38 - £41.99 per month | £451 - £500 per year |
| 9. £42 - £45.99 per month | £501 - £550 per year |
| 10. £46 - £49.99 per month | £551 - £600 per year |
| 11. Over £50 per month | Over £600 per year |
| 12. Don't know | |

ASK ALL

Q13. Does your household have a water meter where you pay for how much water you use?

SINGLE CODE. DO NOT READ OUT

1. Yes
2. No
3. Don't know



ASK ALL

Q14. Are you aware that Thames Water give support to customers who are financially vulnerable? (i.e. on a low income, or in financial difficulties and struggling to afford their water bill)

SINGLE CODE. DO NOT READ OUT

1. Yes
2. No
3. Not sure

ASK ALL

Q15a. Thames Water has a discounted rate to help customers in financial difficulties. How much do you know about this?

SINGLE CODE. DO NOT READ OUT – PROBE TO PRE-CODES

1. I know a lot
2. I know quite a lot
3. I know a little bit
4. I do not know anything about it

[SHOW TEXT ON NEW SCREEN WITH TIME DELAY [15 SECONDS] TO ENSURE RESPONDENTS FULLY READ THE INFORMATION BEFORE BEING ABLE TO CLICK THROUGH TO THE NEXT SCREEN]

Thames Water offer a discounted rate to help its most disadvantaged households by reducing their water bills. All Water Companies in England and Wales offer similar schemes:

The discounted rate is for those who have a gross household income below £16,480 in the Thames Valley and Home Counties, or below £20,111 for those within Greater London. These low-income customers receive a 50% discount on their bill.

[SHOW TEXT ON NEW SCREEN WITH TIME DELAY TO ENSURE RESPONDENTS FULLY READ THE INFORMATION BEFORE BEING ABLE TO CLICK THROUGH TO THE NEXT SCREEN]

- The discounted rate is funded by adding a small amount to the bills of all customers. This is known as a cross-subsidy.
- Thames Water does not financially profit at all from this cross-subsidy and 100% of the contributions are passed directly on to help customers in financial difficulty.
- **Thames Water customers currently pay SHOW FOR DUAL WATER (Q3 SERVICE TYPE = CLEAN & WASTE) [£1 per month (£12 per year)] SHOW FOR WASTE WATER ONLY (Q3 SERVICE TYPE = WASTE ONLY) [50p per month (£6 per year)] on top of their bills in order to provide a discounted rate for low income customers.**
- The discounts have become even more important as a result of the Cost of Living Crisis.

NEW SCREEN

The discounted rate forms part of a range of support that Thames Water provide to help customers who struggle to pay their water and wastewater bill. Others are:

- A capped rate, so that some metered households won't pay more than the average household if they meet certain criteria of benefits, family size or medical conditions.



This capped rate is cross-subsidised by the bills of other customers (around £1 per year).

- Providing and fitting water meters (free of charge) which encourage water saving, leading to lower bills.
- A Customer Assistance Fund, funded by Thames Water, which matches customer debt payments to clear water arrears.
- A charitable Trust Fund, funded by Thames Water's shareholders, which provides one-off grants to customers in extreme poverty for essential household items like bedding and washing machines and is the largest non-governmental provider of grants to debt advice agencies in our region.
- Offering free 'Smarter Home Visits' to advise customers on how to get the above benefits, and providing water saving advice, leading to lower bills.

SHOW TO THOSE WHOSE ARE CODED "ELIGIBLE FOR TARIFF"

Based on what you have told us about your household income we would like you to keep in mind you would be likely to qualify for the discounted rate – receiving a reduction on your water and wastewater bill.

SHOW TO THOSE WHO ARE CODED "NOT ELIGIBLE FOR TARIFF"

Based on what you have told us about your household income we would like you to keep in mind that it is likely that you would not qualify for the discounted rate.

[SHOW TEXT ON NEW SCREEN WITH TIME DELAY TO ENSURE RESPONDENTS FULLY READ THE INFORMATION BEFORE BEING ABLE TO CLICK THROUGH TO THE NEXT SCREEN]

By 2023 Thames Water will be helping over 300,000 households with the discounted rate. However, taking account of the current Cost of Living Crisis, Thames Water believe that over 475,000 low income customers will be in need of financial support and would qualify for the discounted rate, and it would like to help these additional 175,000 customers by 2025.

Bearing in mind the information you have seen you will now be asked some questions about your willingness to support the discounted rate through your Thames Water bill in 2023-2025 and beyond.

At this stage, we are assessing your willingness to support the discounted rate, your answers do not automatically opt you in or out of the program.

The costs mentioned EXCLUDE inflation and they represent the ADDITION to your bill to help the additional 175,000 households.



SHOW TO WASTEWATER CUSTOMERS (SERVICE TYPE = WASTE ONLY) WITH DIFFERENT PRICES – SEE BELOW

ASK ALL-

Q15. How far would you support or oppose a discounted rate which would help 175,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 83p per month (£9.97 per year) towards helping these low income customers

SINGLE CODE. FLIP SCALE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Strongly support
2. Somewhat support
3. I don't mind either way
4. Somewhat oppose
5. Strongly oppose
6. Don't know

ASK ALL WHO CODE 2-6 AT Q15.

Q16. How far would you support or oppose a discounted rate which would help 150,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 71p per month (£8.54 per year) towards helping these low income customers.

SINGLE CODE. FLIP SCALE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Strongly support
2. Somewhat support
3. I don't mind either way
4. Somewhat oppose
5. Strongly oppose
6. Don't know

ASK ALL WHO CODE 2-6 AT Q16

Q17. How far would you support or oppose a discounted rate which would help 100,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 47p per month (£5.70 per year) towards helping these low income customers.

SINGLE CODE. FLIP SCALE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Strongly support
2. Somewhat support
3. I don't mind either way
4. Somewhat oppose
5. Strongly oppose
6. Don't know

ASK ALL WHO CODE 2-6 AT Q17.

Q18. How far would you support or oppose a discounted rate which would help 50,000 additional households who are struggling to pay water & wastewater bills. All customers would pay up to an additional 24p per month (£2.85 per year) towards helping these low income customers.

SINGLE CODE. FLIP SCALE. DO NOT READ OUT – PROBE TO PRE-CODES.

1. Strongly support
2. Somewhat support
3. I don't mind either way
4. Somewhat oppose
5. Strongly oppose
6. Don't know

Q15-Q18 TO Q3 – SERVICE TYPE 'WASTE ONLY' CUSTOMERS USING THE FOLLOWING PRICING:

- **Q15** 34p per month (£4.07 per year)
- **Q16** 29p per month (£3.49 per year)
- **Q17** 19p per month (£2.33 per year)
- **Q18** 10p per month (£1.16 per year)

Delete reference to water element of bills ie amend to... 'who are struggling to pay wastewater bills'.

ASK ALL.

Q19. Which of the following do you think are the most effective ways for Thames Water to communicate its discounted rate to customers that might be eligible?

MULTI CODE. RANDOMISE. READ OUT.

1. Messages on the Thames Water inbound telephone line
2. Website and social media
3. Emails
4. Working with charities and debt advice agencies
5. Posters/leaflets in doctors surgeries, dentists and hospitals
6. Leafleting directly to homes
7. Face to face (e.g. stalls in shopping centres, door knocking)
8. Included within bill statements
9. Other (please specify) **HOLD**

Further profiling**INTRO:**

Thanks for all your answers so far. In this last section we just have a few more profile questions to ask you, to make sure the views of all of our customers are represented.

Please click NEXT to continue

ASK ALL.

Q21. Which of the following statements best describes how easy or difficult you find it to pay your water and wastewater bill each month?

SINGLE CODE. READ OUT.

1. I do not have any problems paying my bill
2. I rarely find it difficult to pay my bill
3. I sometimes find it difficult to pay my bill
4. I frequently find it difficult to pay my bill
5. I always find it difficult to pay my bill

ASK ALL. SINGLE CODE

Q22. Would you be happy to be re-contacted by Thames Water if they wished to follow up on any of the answers you have given today?

1. Yes
2. No

THANK YOU SCREEN AND CLOSE [ONLINE]

That's all for today! Thank you so much for taking the time to complete this survey, we appreciate your feedback.

END TEXT [CATI]: Thanks for your time today, that's all the questions we have. We really appreciate your feedback.

Your answers and any personal information are handled in line with current data protection laws and treated in the strictest of confidence. For further information on how we handle your data and to find out more about your rights, I could provide you with our privacy policy and that of Verve Partners, would you like to make a note of these?

<https://www.addverve.com/privacy-policy>