

IAP Bill Profile AT

Final Quantitative Data



Research Background, Methodology & Sample

Background

- Anglian Water, the largest geographical water and water recycling company in England and Wales, has commissioned Accent to undertake research on the acceptability of their plans to customers
- Three previous waves have already been undertaken to assess the acceptability of:
 - The draft SDS
 - ODIs
 - The proposal 2020-2025 Business Plan



- Phase 4 of Acceptability Testing sought customers' views on the revised bill profile following Ofwat's IAP
- This document outlines the findings from this Wave 4 research.

Research method and sample

15 minute questionnaire

Fieldwork conducted between 18th – 24th March 2019



1,122 household customers. All dual supply
1,022 via Dynata & Critical Mix panels/100 via
telephone

HH data was weighted to reflect AW customer profile
by age, gender and social grade

Data analysis based on 90% confidence level



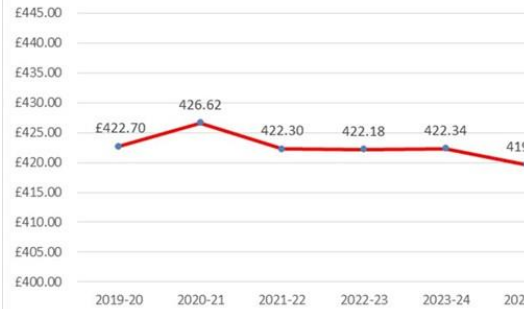
73 non household customers. All dual supply
All conducted via telephone

Data unweighted

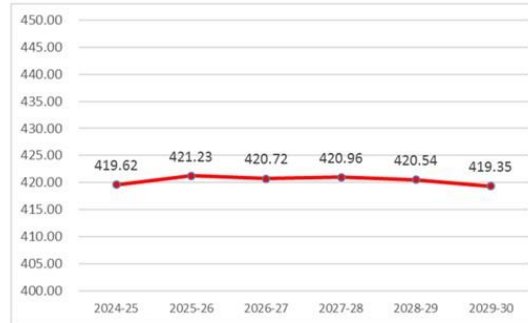
Sample sizes is small and should be used as indicative
views of the NHH population

Three different bill profiles were tested with customers:

The proposed AMP7 bill
Impact of inflation also shown



The proposed AMP8 bill
Impact of inflation also shown



The proposed new bill profile (March 2019)
Impact of inflation also shown

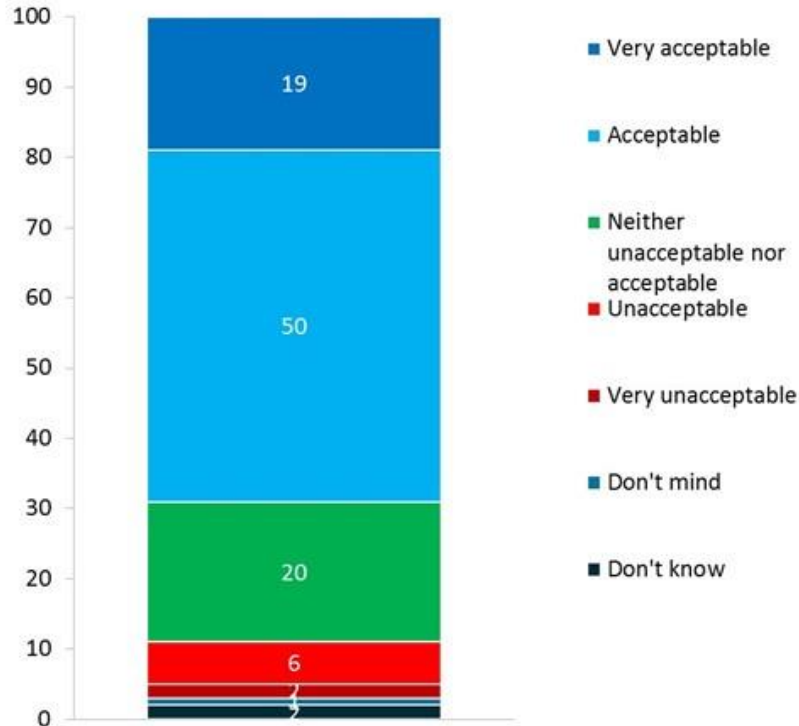
bill profile
Impact of inflation also shown





Findings

Overall HH acceptability of the proposed AMP7 bill stands at 70%
 This includes 'don't mind' responses but excludes the 20% who scored neutral



HH acceptability stands at 70%

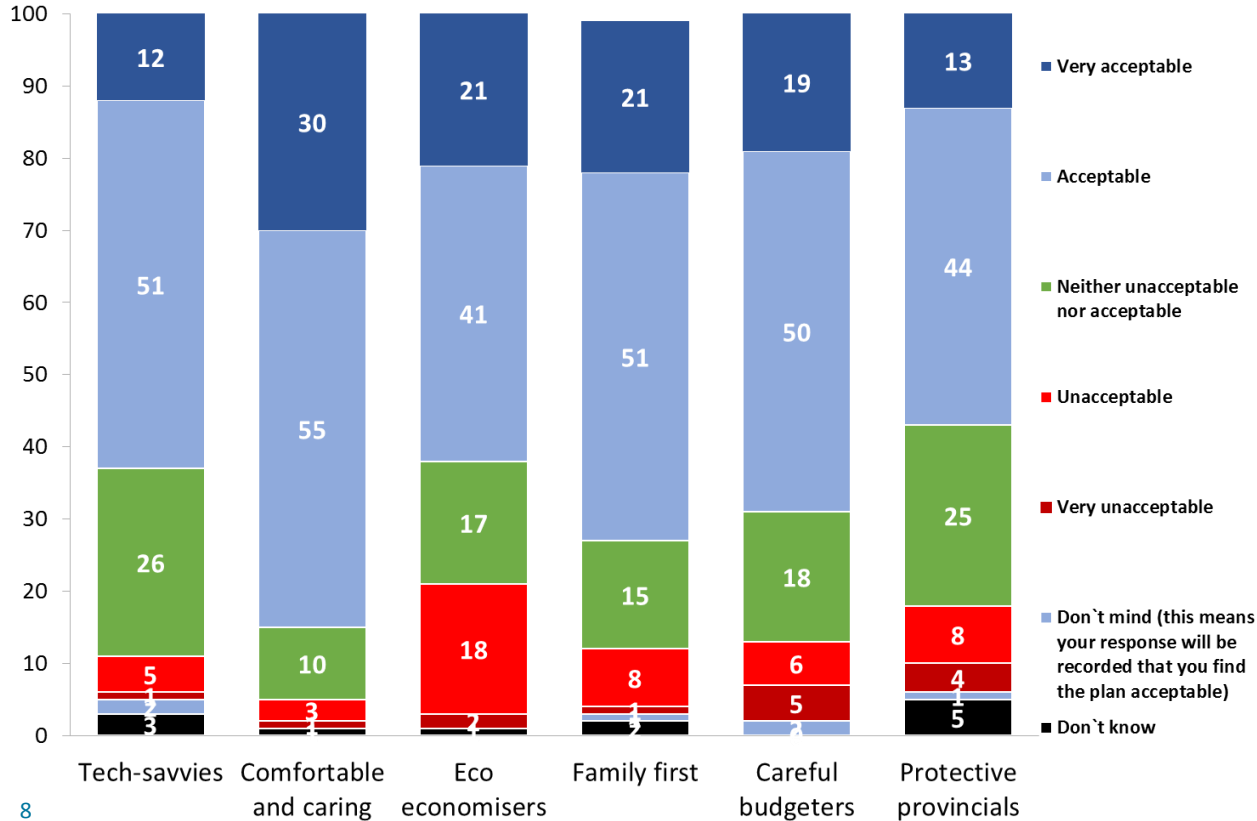
- Acceptability is highest among 75 and overs
- While overall acceptability is similar in other age groups, the proportions stating 'very acceptable' is higher among 35-74s than it is among under 35s

NHH acceptability stands at 81%



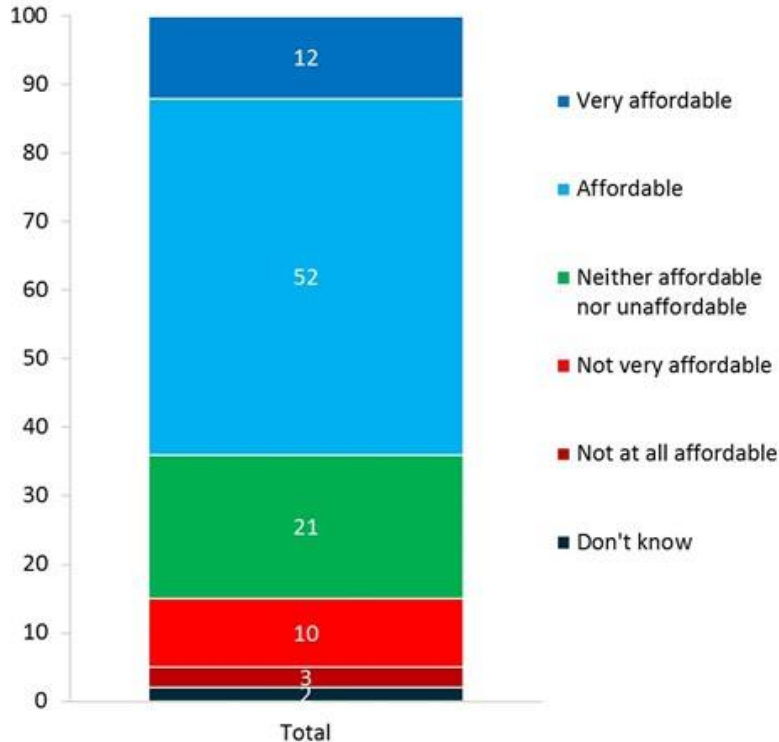
HH segment acceptability of proposed AMP7 bill

Comfortable and Caring gave the highest acceptability score at 85%



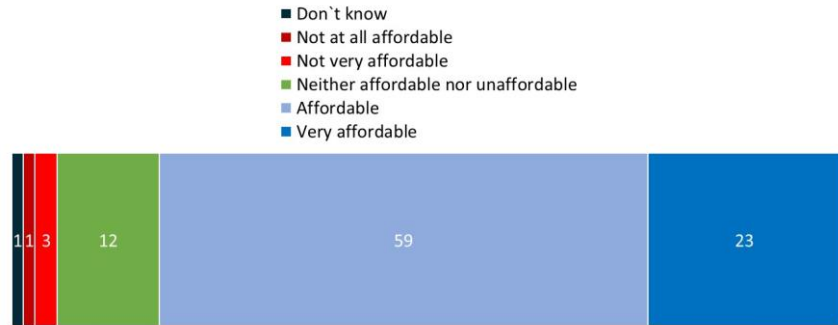
- Family First (72%) and Careful Budgeters (69%) also provide fairly high acceptability scores
- Lowest acceptability score provided by Protective Provincials (57%)

Overall HH affordability of the proposed AMP7 bill stands at 64% 21% scored neutral



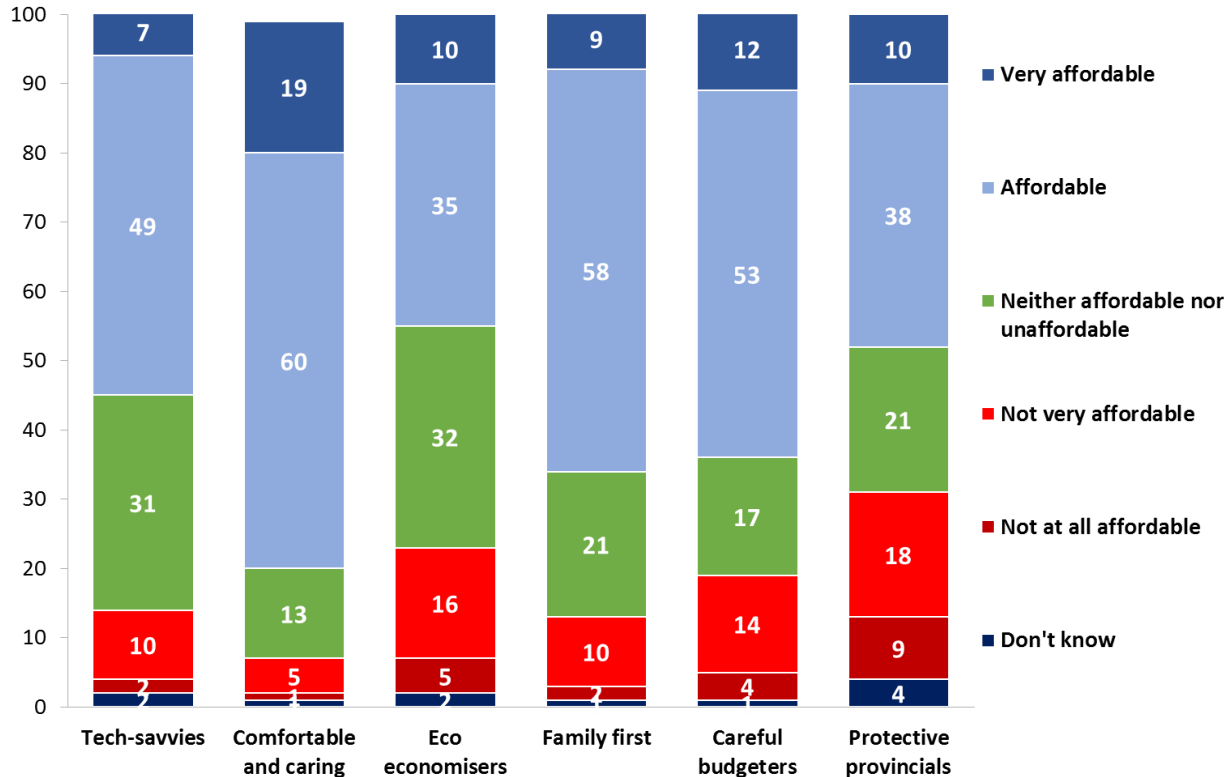
- HH affordability stands at 64%
 - 55-74s significantly more likely to give a score of very affordable (16%) than younger age groups
 - Under 35s significantly more likely (than 35-74s) to give neutral score

■ NHH affordability stands at 82%



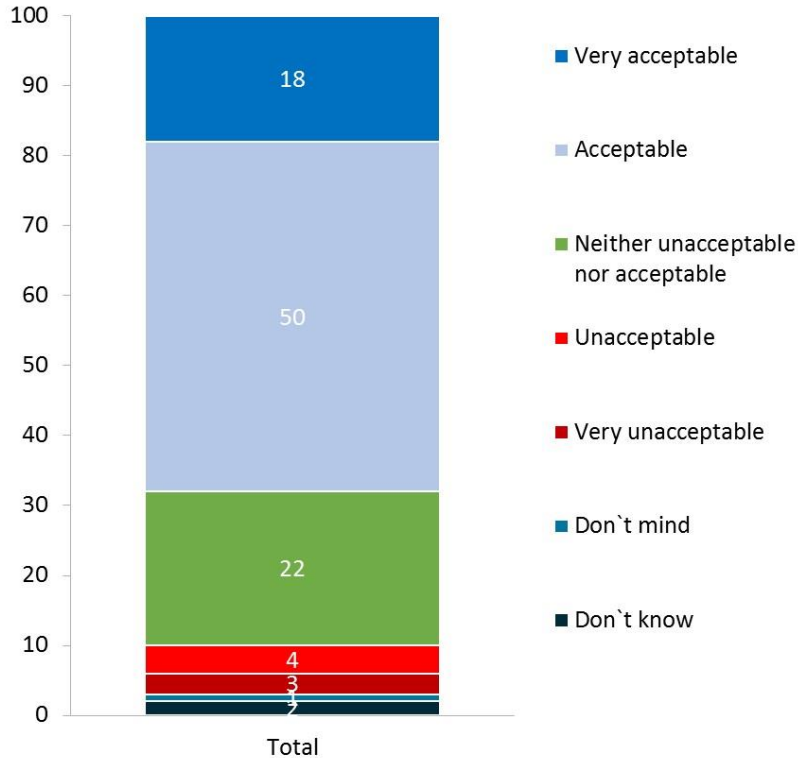
HH segment affordability of the proposed AMP7 bill

Comfortable and Caring gave the highest score at 79%



- Family First (67%) and Careful Budgeters (65%) also provide fairly high affordability scores
- Lowest affordability score provided by Protective Provincials (48%)

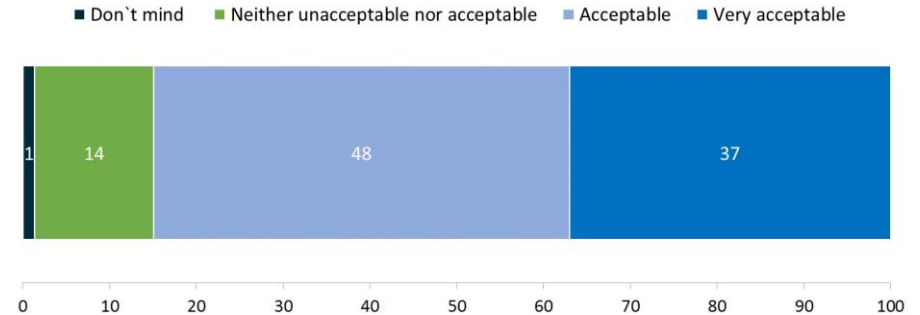
Overall HH **acceptability** of the proposed AMP8 bill stands at 70%
 This includes 'don't mind' responses but excludes the 22% who scored neutral



HH acceptability of the AMP8 bill stands at 70%

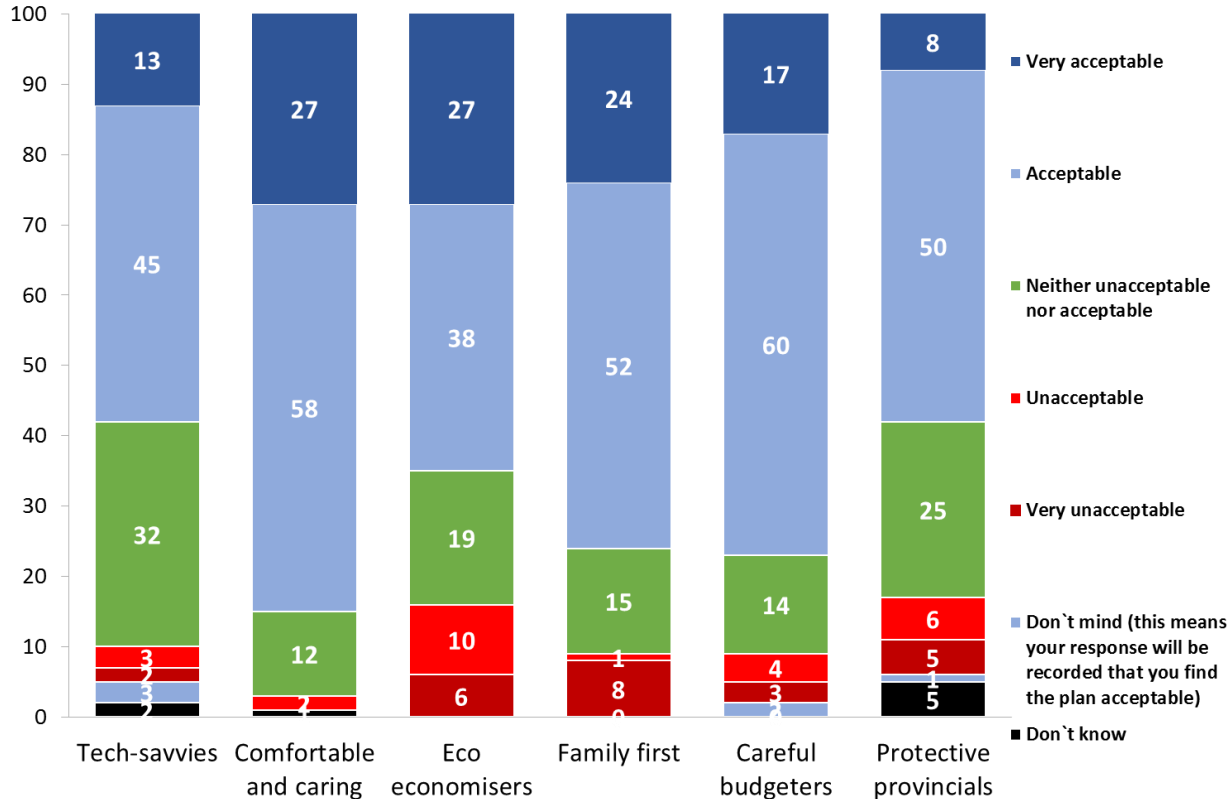
- The highest level of acceptability shows among the oldest age group (75 or over)

NHH acceptability stands at 86%



HH segment acceptability of the proposed AMP8 bill

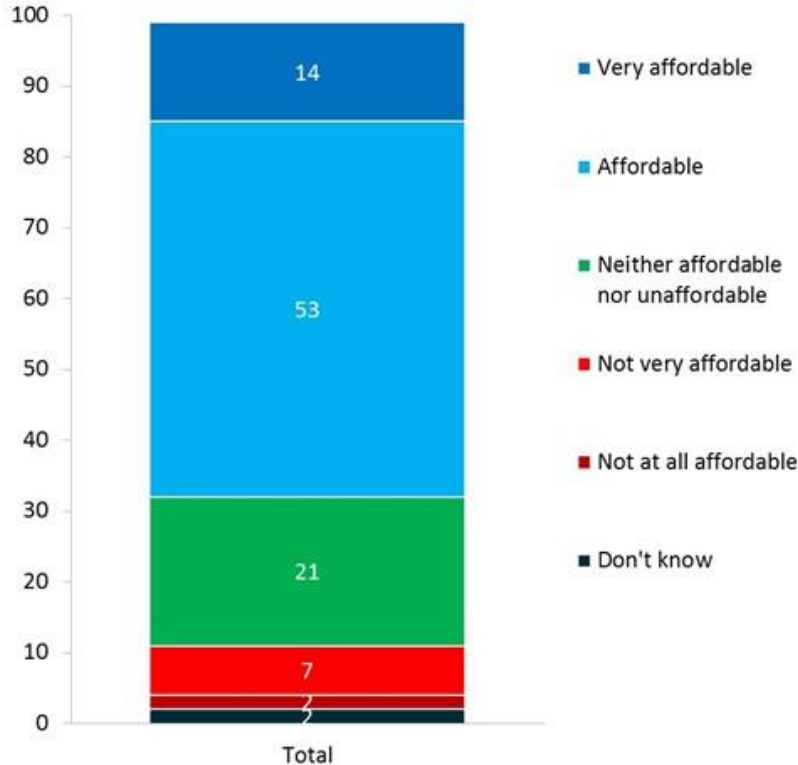
Comfortable and Caring gave the highest score at 85%



- Family First (67%) and Careful Budgeters (65%) also provide fairly high affordability scores
- Lowest acceptability score provided by Protective Provincials(59%)

Overall HH affordability of the AMP8 bill stands at 67%

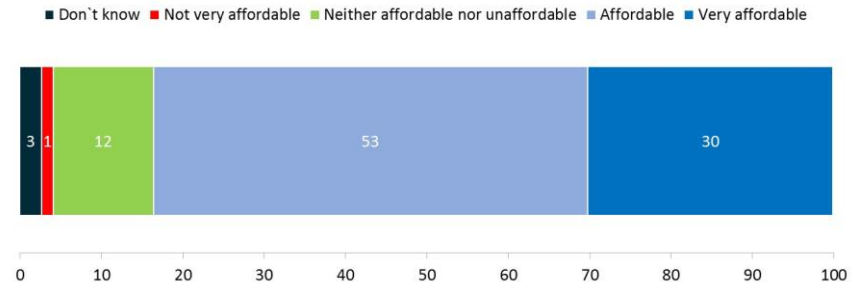
22% scored neutral



HH affordability stands at 67%

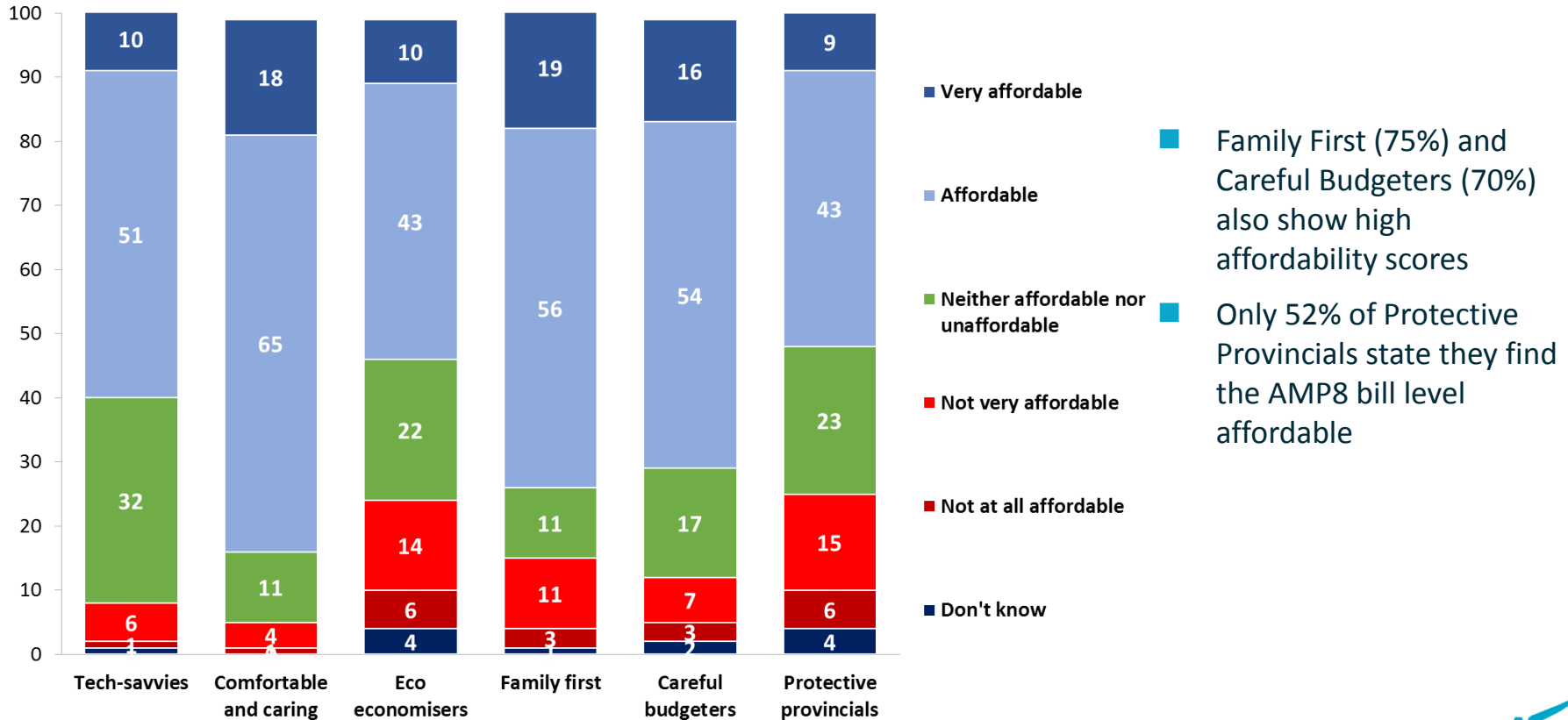
- Few differences by sub groups – highest affordability score among 75 and overs (72%)
- 55-74s, however, most likely to judge AMP8 bill as 'very affordable' (19%)

NHH affordability stands at 83%

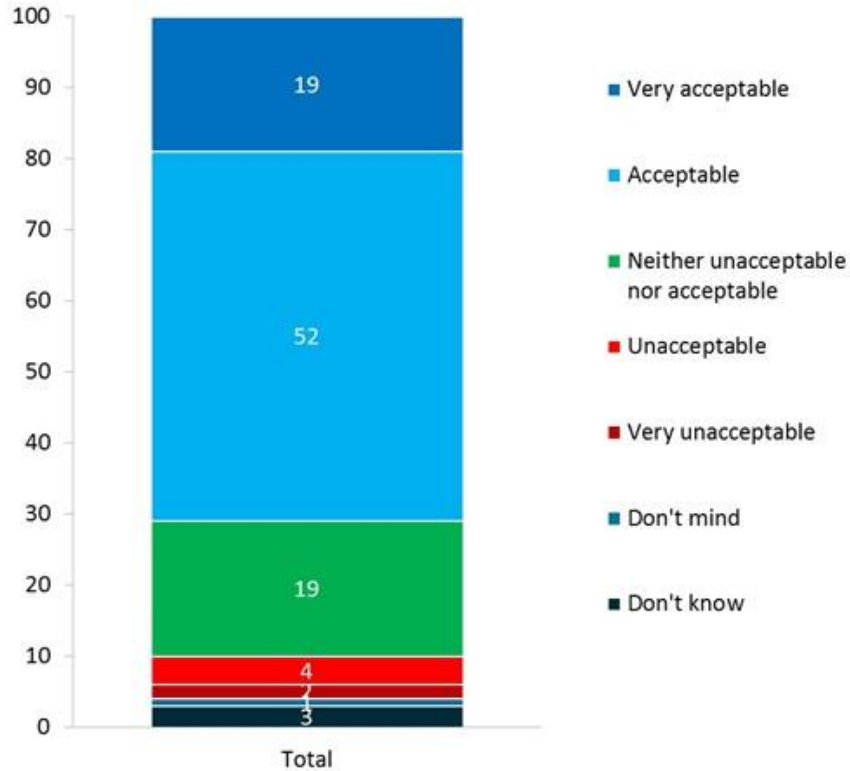


HH segment affordability of the proposed AMP8 bill

Comfortable and Caring gave the highest score at 83%



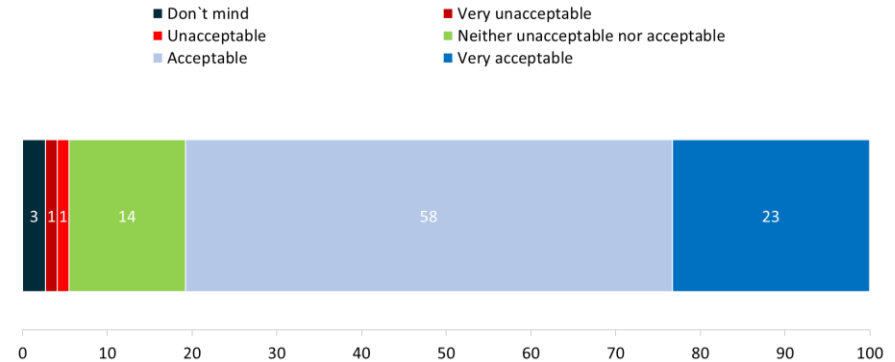
Overall **acceptability** of the revised bill stands at 72% - this includes “don’t mind” but excludes the 19% who scored neutral



■ HH acceptability stands at 72%

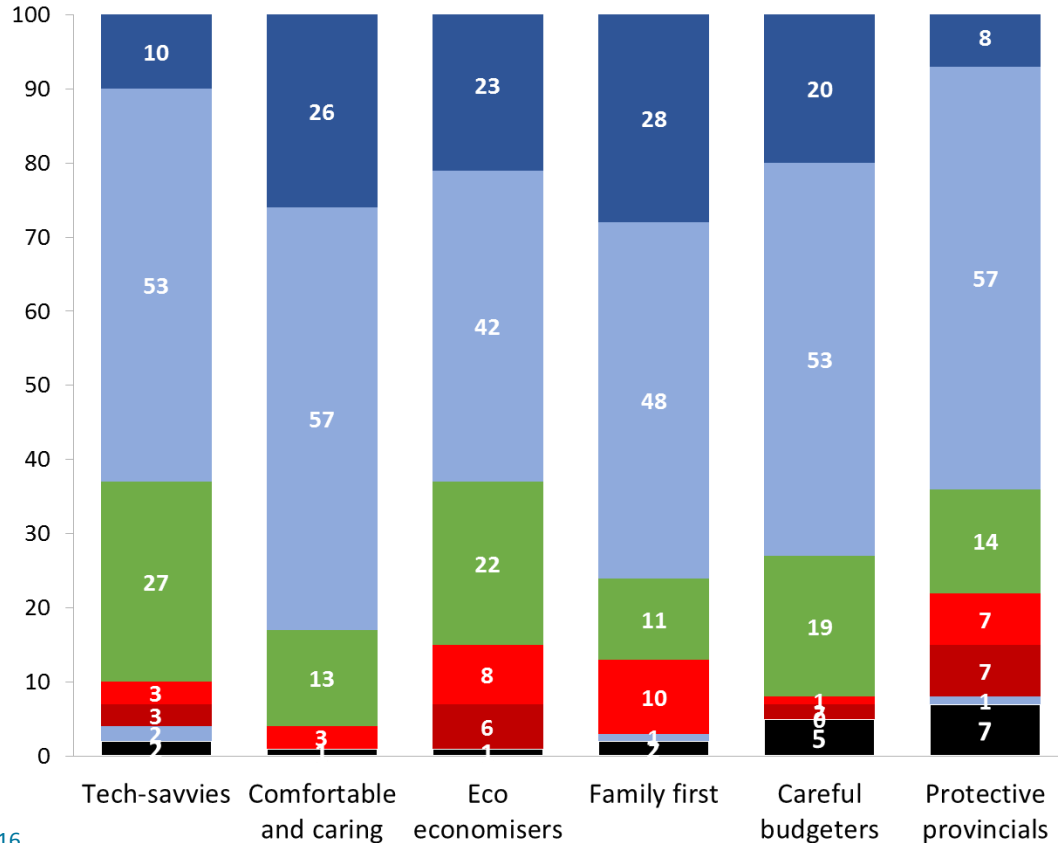
- Few differences by sub groups
- ABs significantly more likely to find the revised bill “very acceptable” and social grade DEs

■ NHH affordability stands at 83%



HH segment **acceptability** of the revised bill

Comfortable and Caring gave the highest score at 83%



- Family First (76%) and Careful Budgeters (73%) also show high acceptability scores
- Only 8% of Protective Provincials and 10% of Tech Savvies state they find the revised bill very acceptable

Accent

