

A photograph of a woman and a young girl. The woman, in the background, is holding a clear glass of water to her lips and drinking. The young girl, in the foreground, is also holding the same glass and looking towards the camera with a slight smile. The background is softly blurred, suggesting an indoor setting.

Customer Research in the context of the Green Recovery programme

Key findings

Customer Research demonstrates that customers support the Green Recovery programme.

- 57% of customers support the proposed programme, more than double the 22% that oppose
- Statistically robust sample of over 2,054 responses, covering key customer sub groups.
- Customer commentaries indicate a good understanding of question topics
- Individual proposals gained high levels of support for benefits before bill impacts, consistent with past research
- When bill impacts were presented levels of acceptance for individual proposals changed, but remained generally high, at between 56% and 81%

However some customer sub groups have concerns

- Support lower amongst lower income and vulnerable customer groups, at between 41% and 47%
- Customer reasons for rejecting proposals consistently highlight cost and affordability as points of concern
- 65% of those that oppose final £6.50 bill impacts reference price or affordability as a reason

Changes since conducting research

Since field work began there have been some changes to the Green Recovery programme.

These changes are likely to improve customer acceptance.

- The proposal to accelerate water meter installations has been removed from the programme. This project consistently demonstrated lower levels of acceptance than other elements.
- The emissions regulation and carbon reduction project has had scope modifications to reduce overall bill impacts, and focus on elements that did not attract customer concern.
- Overall bill impacts for the programme have reduced, from £6.50 when tested with customers to below £5.

Next steps

Consider final comments

Results will be presented as part of Green Recovery proposals, alongside research from PR19 and other sources.

Mitigation for customers that have concerns about bill impacts will for part of the final programme proposals.

Questions?