



# United Utilities: Drainage Wastewater Management Plan acceptability testing 2023

May 2023



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# Background, objectives & methodology

# Context

The following events happened before or during the fieldwork period and may have influenced respondents' answers.



## April 25th 2023

Government announces that the sewage reduction targets set in August 2022, designed to eliminate sewage dumping in rivers by 2050, are to become legally binding



## May 4th 2023

Local elections held across 230 councils in England to elect c.8,000 councillors in all – the biggest round of local elections since May 2019. Concerns over river sewage are a hot topic in some areas. Fieldwork coincided with the pre-elect period.

**March 16th:** the Spring budget saw a three month extension to current Government subsidies, limiting typical household energy bills to £2,500 a year until the end of June

**April -May:** The continuation of a series of strikes in England including Junior Doctors, environmental agency workers, teachers and civil servants

**April 28th 3rd:** BBC chairman Richard Sharp resigns after Boris Johnson loan row

**May 2nd:** NHS pay deal agreed for over one million staff in England



## Background, objectives & methodology

All water companies have a statutory obligation to produce a Drainage Wastewater Management Plan (DWMP) which sets out their strategy for managing wastewater over the next 25 years.

At the end of 2022, United Utilities and DJS Research tested a draft version of the DWMP with customers and future stakeholders. Based on the feedback received, United Utilities reviewed the draft plan and made improvements to it.

This research tests the revised version of the draft plan with household and non-household customers, as well as future bill payers, in order to assess its acceptability. SIMALTO (simultaneous multi-attribute trade off) analysis is not employed this wave like it was in the previous due to the simpler nature of the choice exercise this time around rendering it unnecessary ([see here for more details](#)).



# Methodology

Quotas and weighting were used where appropriate to ensure the samples were representative of United Utilities' customer base.

## Household

Fieldwork was carried out  
April 2023

566  
interviews



Online &  
face-to-face



5 online  
depths



## Future bill payers

Fieldwork was carried out  
April 2023

105  
interviews



Online



## Non-household

Fieldwork was carried out  
April 2023 – May 2023

155  
interviews



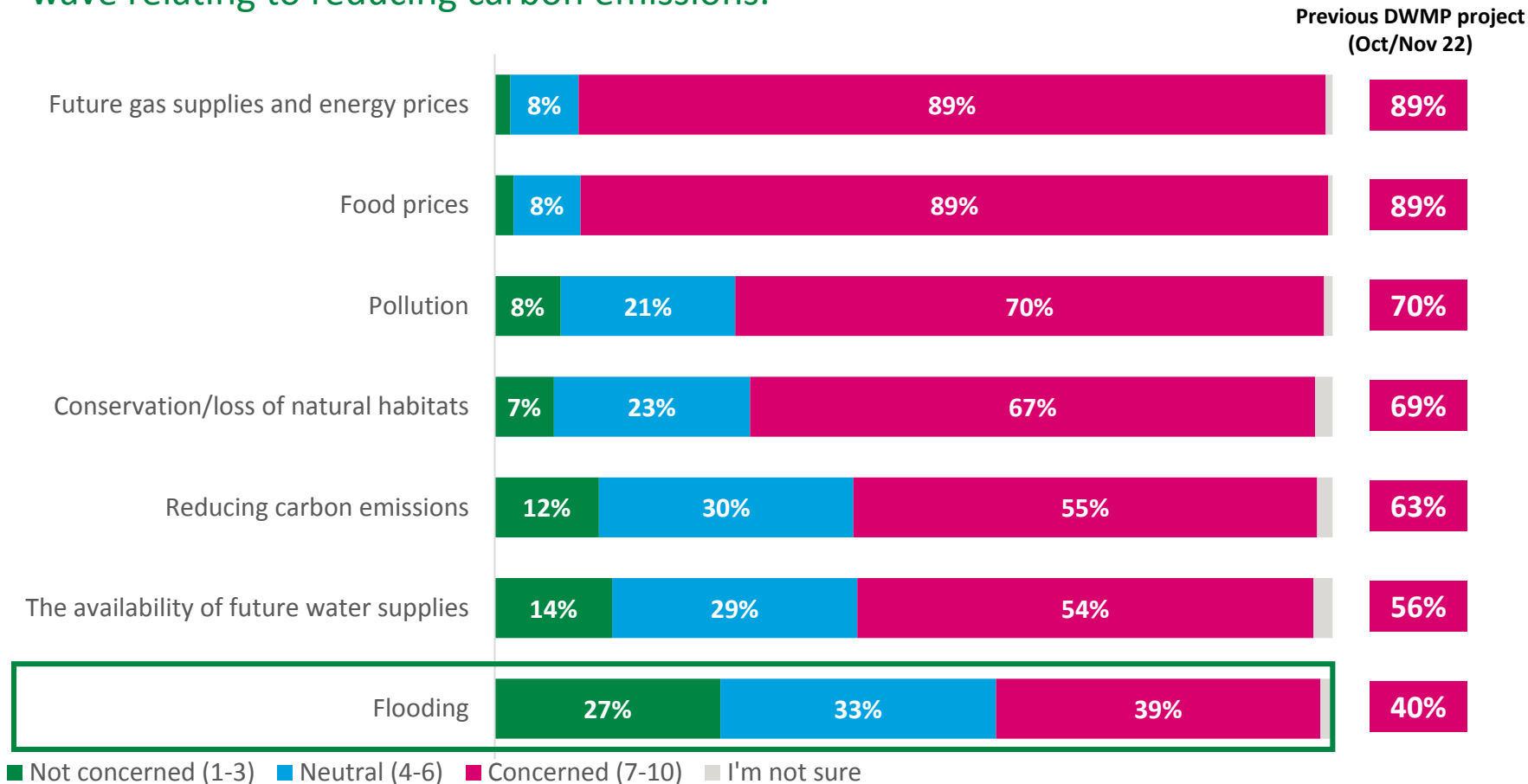
Online &  
face-to-face



# Understanding customer attitudes/experiences

# Customers' concerns

Household customers remain most concerned about the cost of living, with nine in ten concerned by energy and food prices. Results are largely in line with the previous DWMP survey, although there is less concern this wave relating to reducing carbon emissions.



Concern about food prices, and future gas and energy prices is high even among those who report never struggling with their bills (80% & 82% respectively).

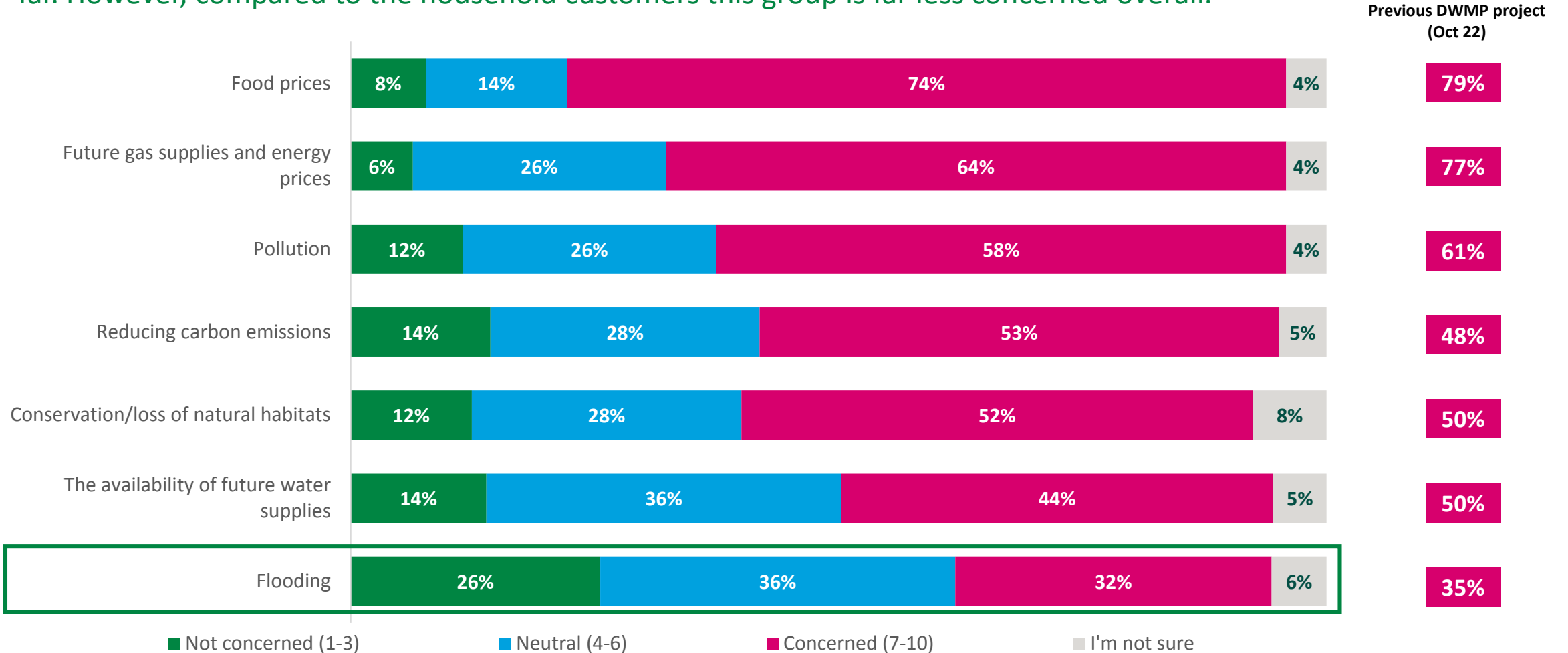
Meanwhile, concerns regarding water matters specifically have reduced slightly since the previous wave, although females (45%) remain more likely than males (32%) to say that they are concerned about flooding.

Q01. On a scale of 1-10, where 1 is not at all concerned and 10 is extremely concerned, how concerned are you about the following? Base: 566. Figures ≤3% suppressed for clarity  
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# Future bill payers concerns

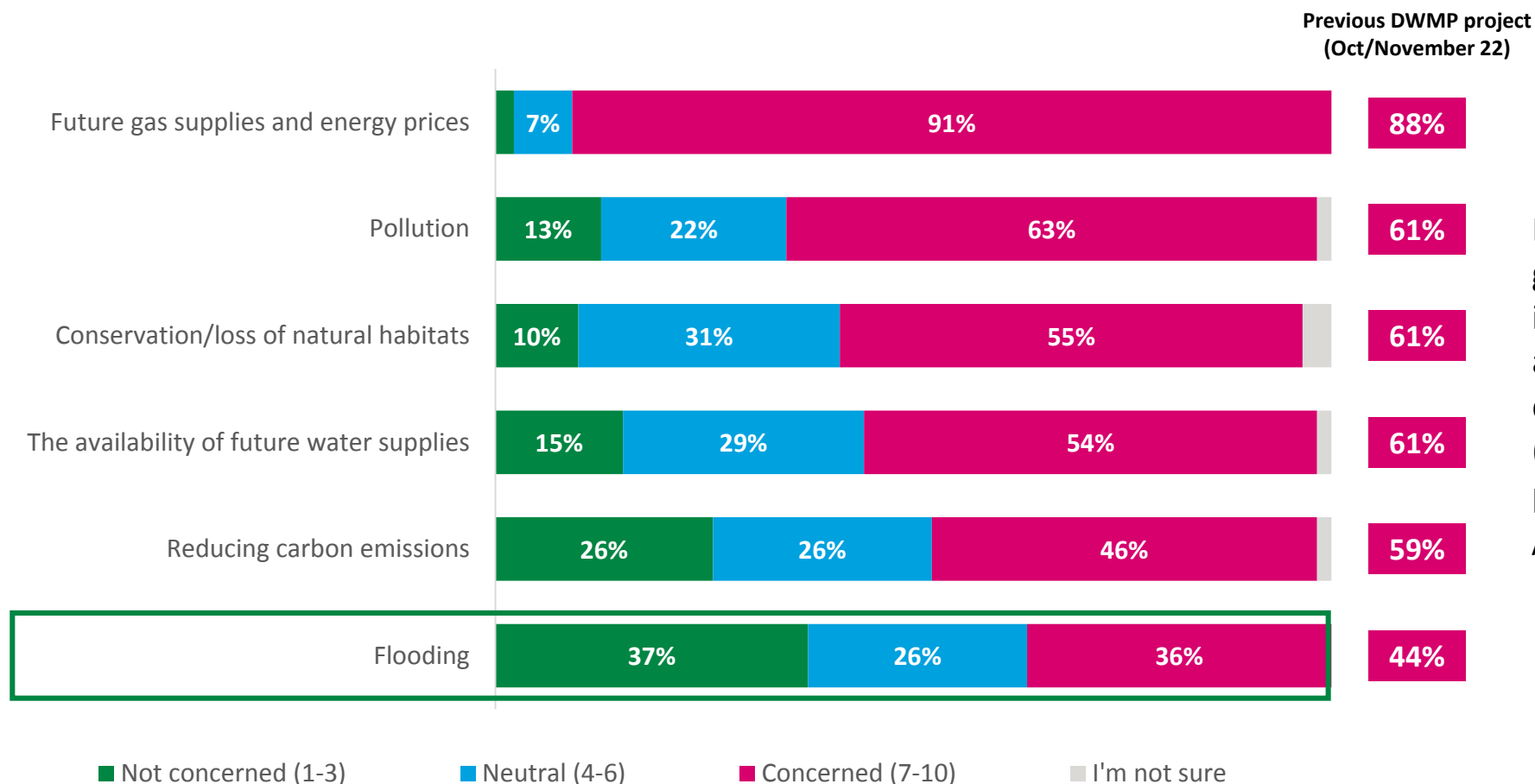
Future bill payers are most concerned about the cost of living, with food prices their main concern by far. However, compared to the household customers this group is far less concerned overall.



Q01. On a scale of 1-10, where 1 is not at all concerned and 10 is extremely concerned, how concerned are you about the following? Base: 105  
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# Businesses' concerns

Businesses remain most concerned about future gas supplies and energy prices. Like with the other segments, non-household customers are least concerned about flooding and are even less concerned than the previous wave.

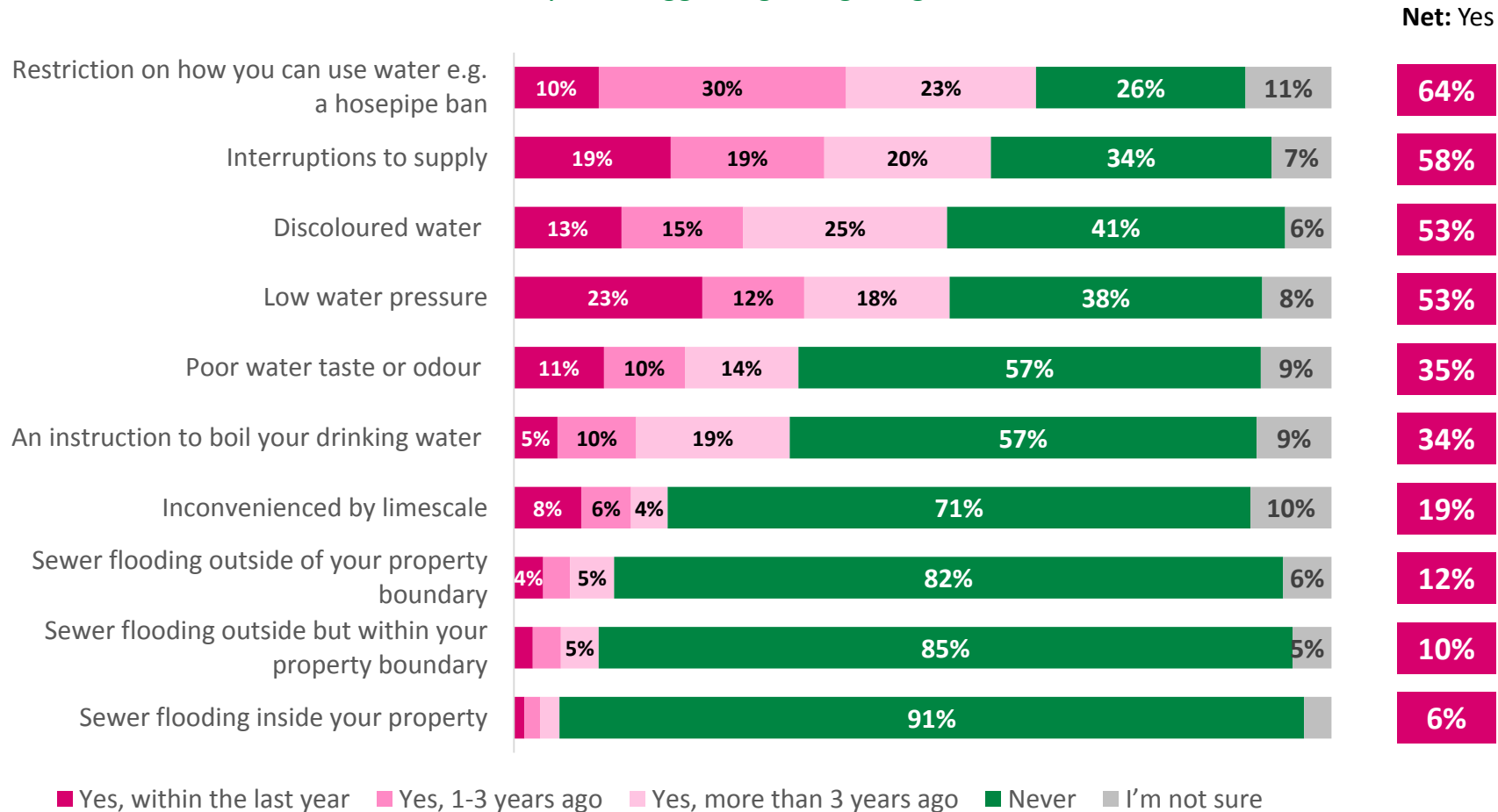


By sector, concern about future gas supplies and energy prices is higher in the services (98%) and wholesale/retail/distribution/hospitality sectors (95%) and lower in the primary/utilities/manufacturing/construction sectors (65%).

Q01. On a scale of 1-10, where 1 is not at all concerned and 10 is extremely concerned, how concerned are you about the following? Base: 156. Figures ≤3% suppressed for clarity  
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# Customers' experiences

Sewer flooding remains quite rare with just over one in twenty having experienced this inside their property. This rises to one in ten for those that have experienced this outside but still within their property boundary. It is, however, worth noting that there has not been a hosepipe ban in the North West for more than 10 years, suggesting a large degree of false recall.

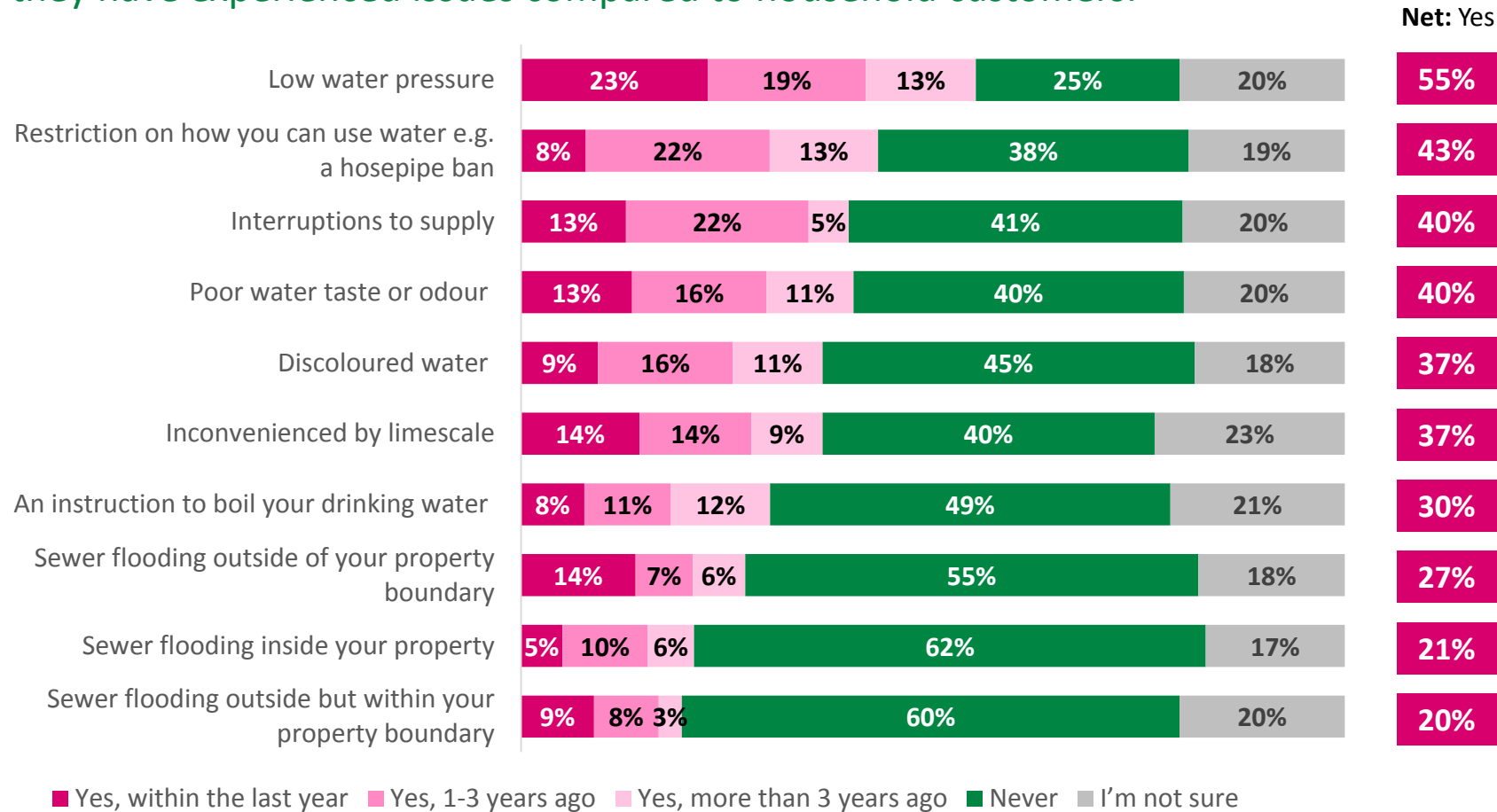


**71%**  
Have experienced at least one of these in the past three years

Q02. I'd now like you to say if you've ever experienced or noticed any of the following situations whilst living in the North West of England? Base: 566. Figures ≤3% suppressed for clarity. \*Due to rounding, totals may not equal 100%

# Future bill payers' experiences

As might be expected, future bill payers are notably less sure about whether they have experienced issues compared to household customers.

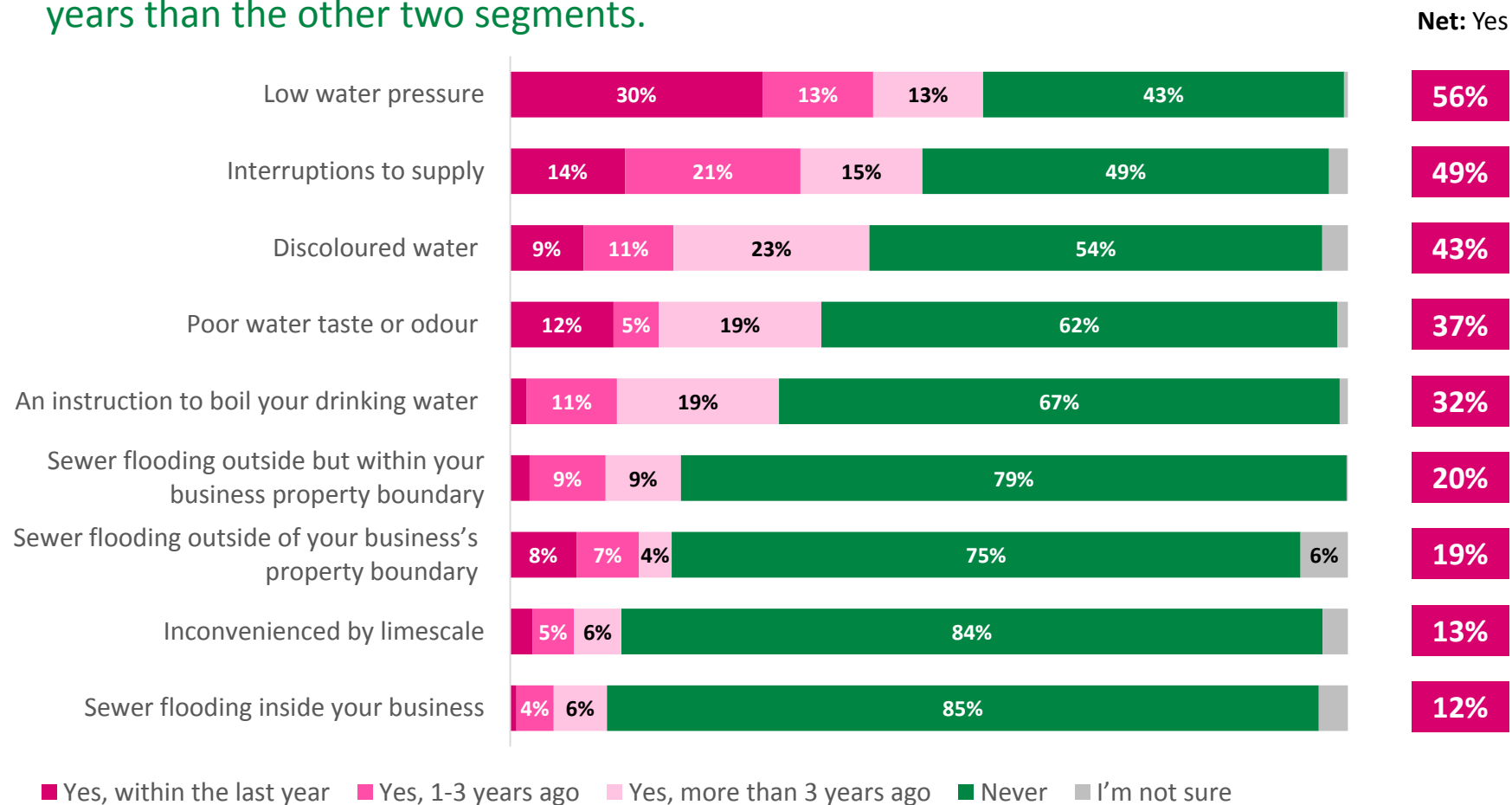


66%  
Have experienced at least one of these in the past three years

Q02. I'd now like you to say if you've ever experienced or noticed any of the following situations whilst living in the North West of England? Base: 105. Figures ≤3% suppressed for clarity. \*Due to rounding, totals may not equal 100%  
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# Businesses' experiences

Businesses are slightly less likely than household customers to have experienced an issue in the past three years than the other two segments.



58%

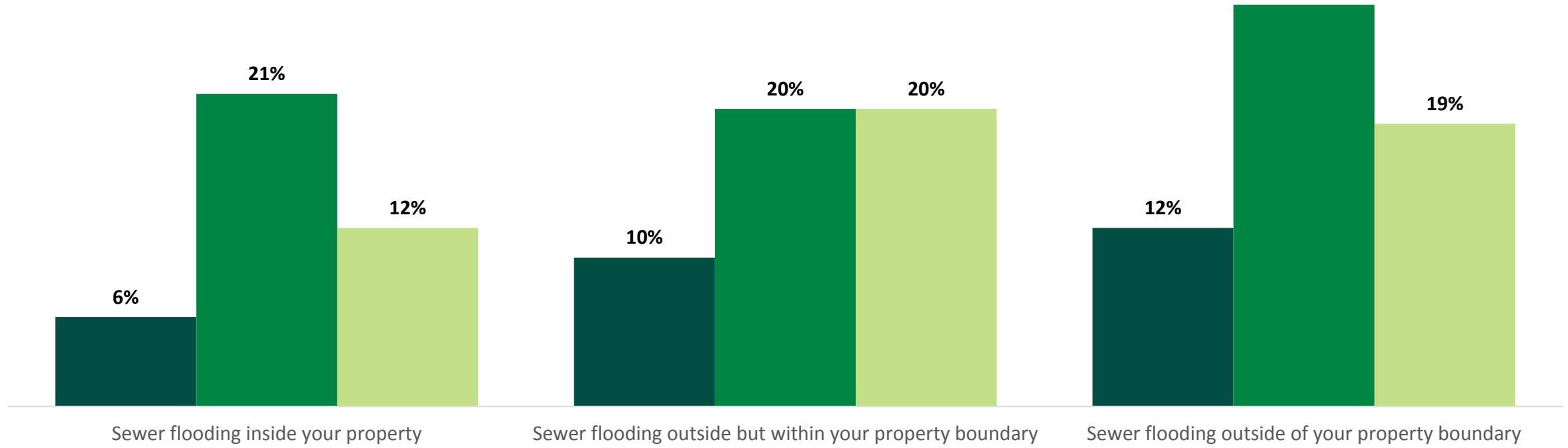
Have experienced at least one of these in the past three years

# Experience of sewer flooding

A large majority of household customers never experienced any form of sewer flooding.

The figures for future bill payers are broadly similar to those seen in the previous wave and are notably higher compared to household customers, suggesting possible confusion as to what constitutes as 'sewer flooding'.

% who have experienced incident



Household

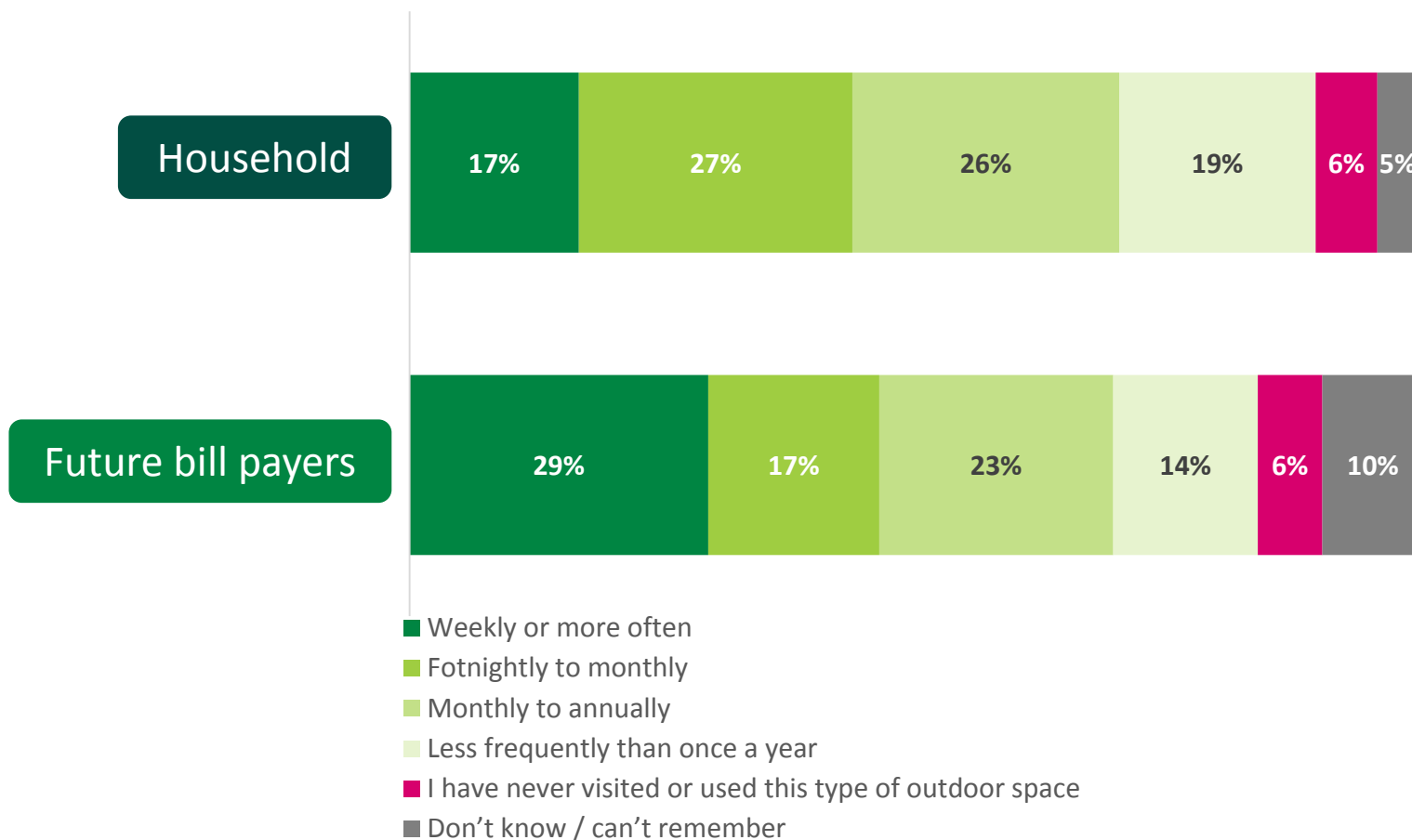
Future bill payers

Non-household



## Use of rivers, lakes, reservoirs, or sea

Just under a fifth of household customers (17%) and almost a third of future bill payers (29%) say they visit rivers, lakes, reservoirs or the sea for recreational purposes once a week or more.



"At least once a fortnight ... In our local area, our river has made a bit of revival so there's been lots of new wildlife and stuff."

**Male, 35-55**

"It gives you an uplift. You're meeting different people and seeing different scenery. It's also important to me to keep active"

**Female, 56-70**

"It's very important for my mental health ... I find running water very soothing."

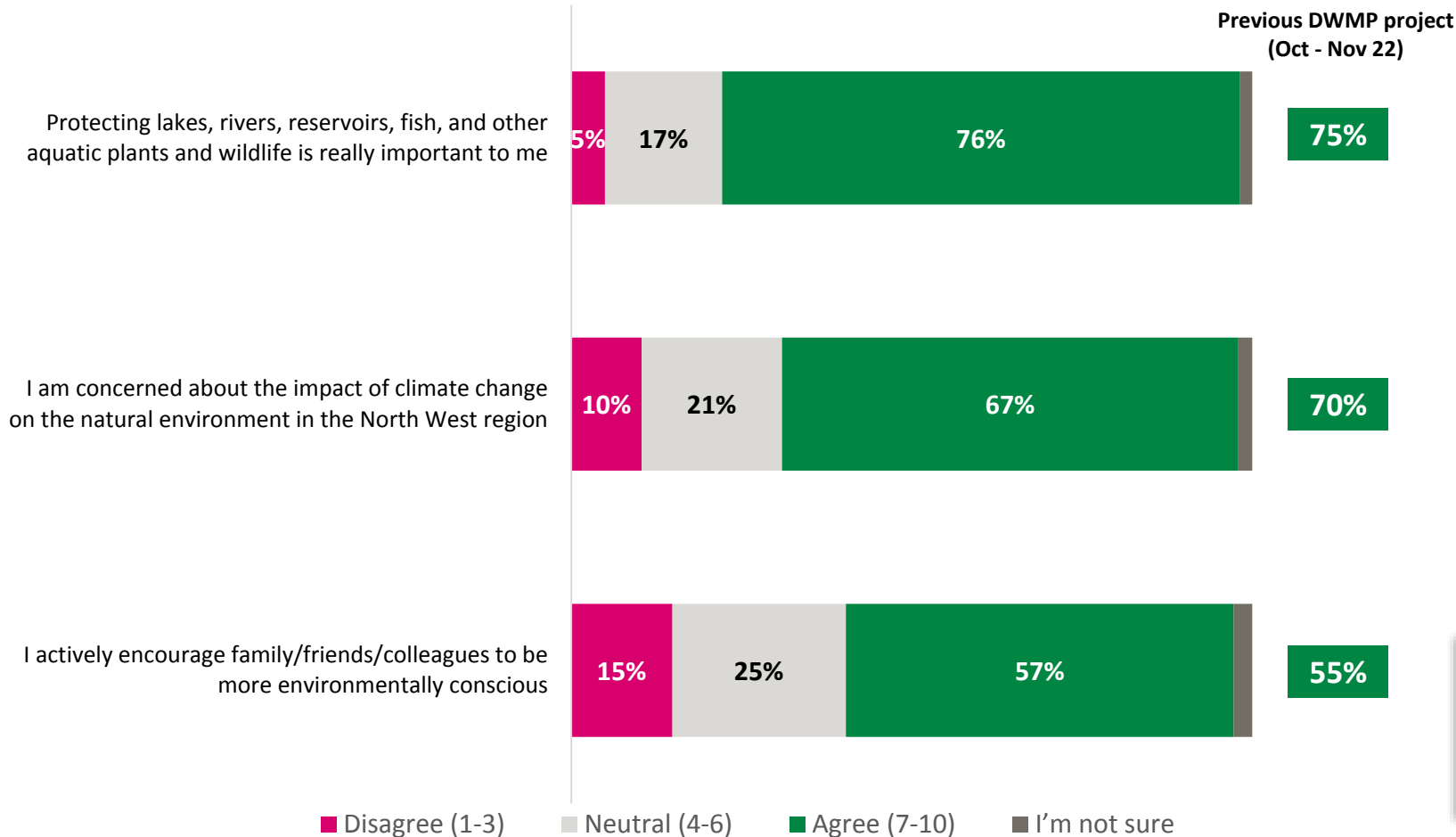
**Male, 35-55**

"Over lockdown it was a daily thing and it was something we wanted to continue, but once I got pregnant I confined myself to the house, to be honest. But it's something I want to get back into again..."

**Female, 18-34**

# Customers' perceptions

Just over three in four customers feel that protecting wildlife and waterways is important compared to just over two thirds who agree they are concerned about the impact of climate change on the North West region.



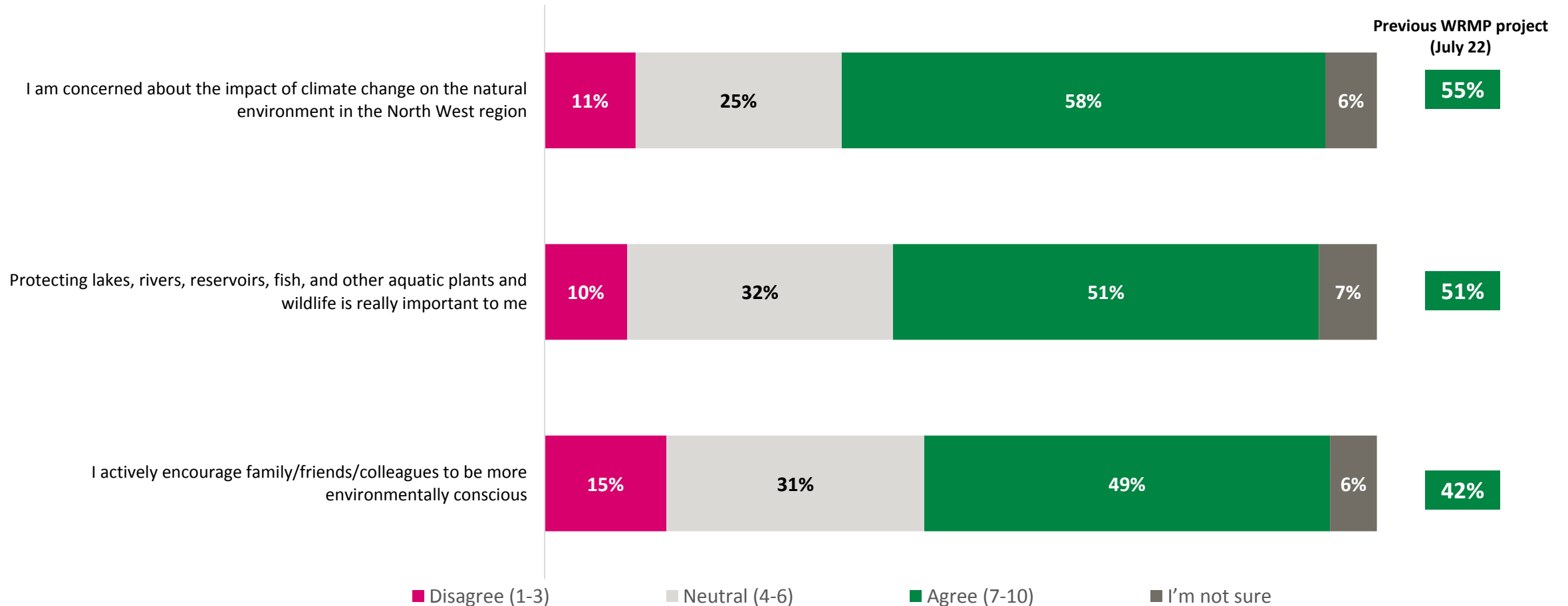
AB is the socio-economic group most likely to actively encourage their friends and family to be more environmentally conscious (68% cf. 58% C1; 55% C2 50% DE).

Those aged 35-44 are significantly more likely to disagree than average that they are concerned about the impacts of climate change on the North West region (21% cf. 10%).

"I think it hits home that even on the other side of the world, your actions can actually affect wildlife"  
**Female, 18-34**

# Customers' perceptions

For future bill payers, concern about the impact of climate change on the North West has nominally increased wave on wave and remains the most agreed with statement. However, the percentage of future bill payers encouraging friends and family to be more environmentally conscious has increased and now sits at just under 50%, although this change is not significant.



# Level of investment choice

# The choice exercise



Customers were shown three different investment levels pertaining to areas of the DWMP which are not fixed by law (listed on the right) and asked to choose their preferred one. Unlike in the previous wave, customers were not given a choice for each individual area and were instead asked to choose their preferred level of overall investment. The simpler nature of the exercise this time around meant it was unnecessary to employ the SIMALTO (simultaneous multi-attribute trade off) analysis used for the previous wave. Instead, acceptability can be gauged directly from responses to the choice exercise and follow-up questions. It should be noted that while customer choice was lessened this time around, the simpler nature of the exercise likely encouraged respondents to engage with the options more deeply.



To inform their choices, customers were shown the impact the levels had on a number of key metrics: customer bills (average monthly 2030 bill for HH/FBP and % change for NHH), inside home flooding risk, pollution to the water environment, United Utilities' carbon footprint and the benefits to environment/society. Other metrics (e.g. external flooding risk) were omitted to avoid overburdening respondents.

Areas
Customer education
Intelligent sewers
Sewer upgrades
Storage tanks
Sustainable drainage solutions

## Bill impact context

The bill increases associated with the various levels of service was a highly important factor for customers to consider when making their choices. As such, every effort was made to illustrate the bill changes in a meaningful and appropriate way. For household customers and future bill payers, this meant displaying the monthly bill change, rather than annual, following learnings from the WRMP draft acceptability cognitive tests. Meanwhile, for non-household customers, this meant presenting bill changes as a percentage because an average bill for this segment would be meaningless given the degree of bill variability.

Moreover, to fully contextualise the bill impacts, the text preceding the exercise grounded respondents as much as possible to encourage them to make realistic choices. It explained that: bill impacts did not account for inflation; that other household bills could increase or decrease in the future; that money spent on service improvements would not be available for them to spend elsewhere; that water bills may also rise due to other factors and service improvements; and that future household expenses would also be affected by rises in costs to goods, services and other bills.





# Developing and testing the choice model

The user interface used in the draft DWMP testing was carried over to this wave. This user interface has already undergone multiple rounds of cognitive testing which meant that no additional testing was deemed necessary prior to this wave.

A Higher level of investment

B UU proposed level of investment

C Lower level of investment

Average monthly bill: £34.75  
Predicted change from average monthly bill: + £1.23

Inside home flooding risk  
Low High

Pollution to water environment  
Low High

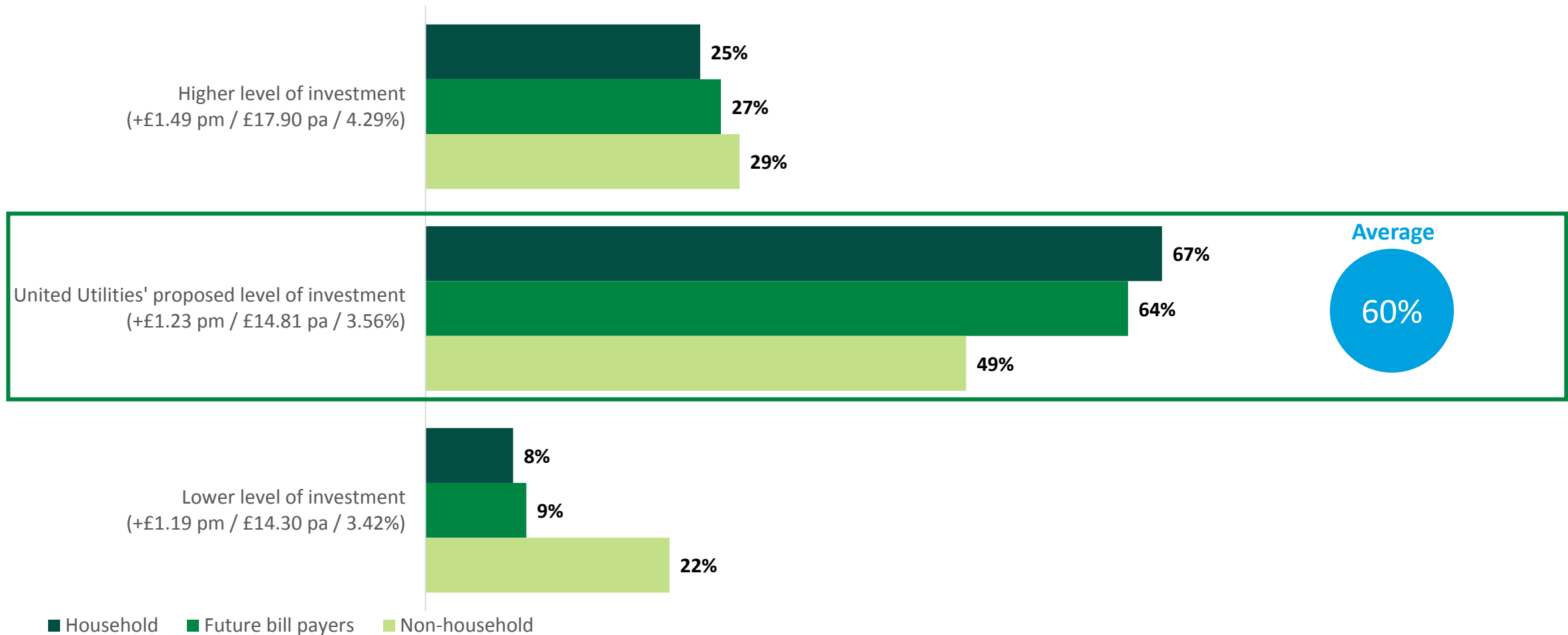
UU's carbon footprint  
Low High

Environmental & social benefits  
Low High

Next

# Investment choices by segment

United Utilities' proposed level of investment is the most popular across all three segments. Around a quarter of all groups opted for a higher investment level and just over a fifth of non-households would prefer a lower level.



Q06A. Investment level choice. Base: all respondents. Note: predicted bill increase displayed in brackets. Copyright © United Utilities Water Limited 2019

# Investment choice: subgroup analysis (I)

Plan acceptability is strong across subgroups, although there are some variations...

	Metered (a)	Unmetered (b)	Cumbria (c)	Merseyside (d)	Greater Manchester (e)	Lancashire (f)	Cheshire (g)
Higher level	29%	22%	24%	23%	23%	28%	29%
UU proposed level	65%	69%	70%	69%	68%	68%	59%
Lower level	7%	9%	6%	7%	9%	5%	12%

	Inner-city (a)	Suburban (b)	Town (c)	Village/rural or countryside (d)	No formal qualifications* (e)	GCSEs/A-levels (f)	Degree or higher (g)
Higher level	30%	22%	27%	25%	26%	26%	24%
UU proposed level	57%	<b>74%</b> >ac	62%	70%	67%	67%	66%
Lower level	14%	<b>4%</b> <ac	11%	6%	7%	7%	10%

	AB (a)	C1 (b)	C2 (c)	DE (d)	Never struggle with bills (e)	Sometimes struggle with bills (f)	Struggle and often behind with bills (g)	Always struggle with bills (h)
Higher level	<b>29%</b> >d	24%	28%	<b>19%</b> <a	<b>30%</b> >f	<b>22%</b> <e	18%	33%
UU proposed level	64%	66%	69%	72%	65%	69%	66%	64%
Lower level	7%	<b>11%</b> >c	<b>3%</b> <b	9%	<b>6%</b> <g	9%	<b>16%</b> >e	3%

Significant differences represented by column letters and are highlighted by bold, blue text. \*Caution: low base size (<30)  
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## Investment choice: subgroup analysis (II)

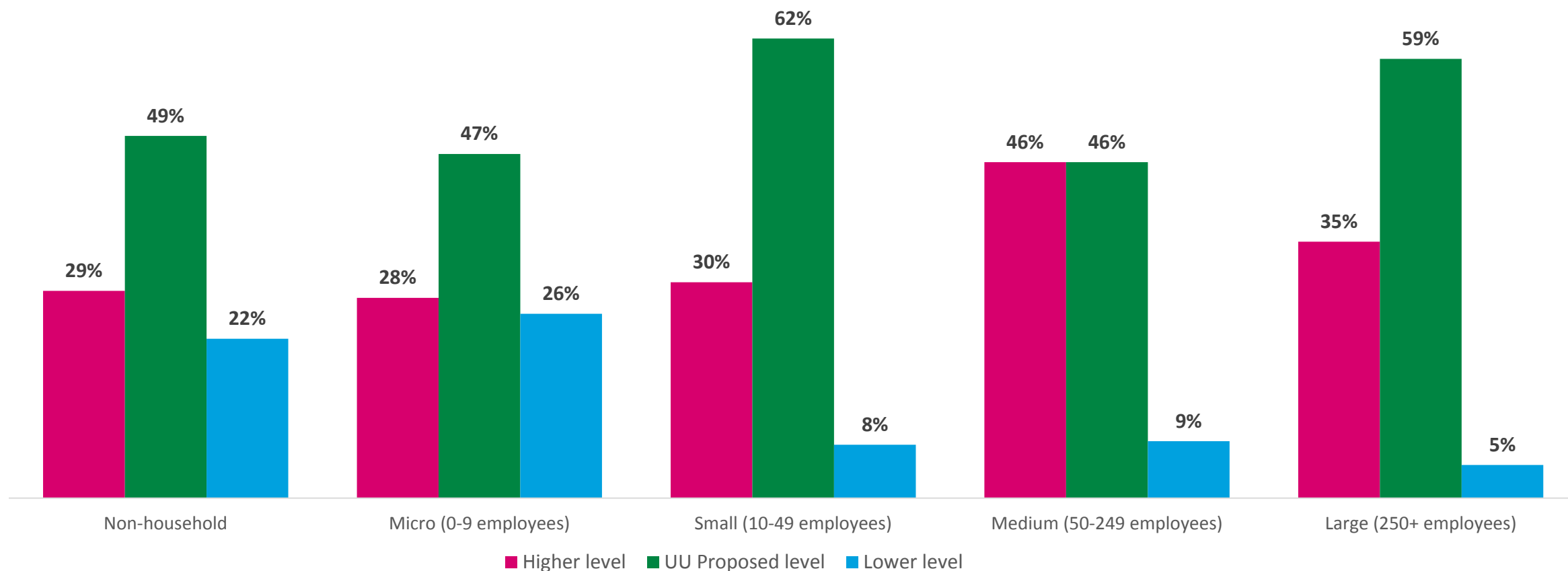
Plan acceptability is strong across subgroups, although there are some variations. It should be noted that breaking down income bands further reveals less support for the higher level of investment (16%) among the lowest paid (<£10.5k).

	HH income <£21k (a)	HH income ≥ £21k (b)	18-34 (c)	35-44 (d)	45-64 (e)	65+ (f)	Male (g)	Female (h)	Disability/ long-term illness in HH (i)	No disability/ long-term illness in HH (j)
Higher level	22%	28%	24%	26%	25%	25%	<b>33%</b> >h	<b>18%</b> <g	27%	24%
UU proposed level	71%	65%	65%	63%	69%	68%	<b>60%</b> <h	<b>74%</b> >g	64%	68%
Lower level	7%	7%	11%	11%	6%	7%	8%	8%	8%	8%

	Not concerned by flooding (a)	Concerned by flooding (b)	Experienced any type of sewer flooding (c)	Not experienced any type of sewer flooding (d)	Visit blue space – at least weekly (e)	Visit blue space – at least fortnightly-monthly (f)	Visit blue space – quarterly (g)	Visit blue space – yearly (h)	Visit blue space – less frequently (i)	Visit blue space – never (j)
Higher level	25%	28%	28%	26%	<b>34%</b> >f	<b>21%</b> <e	20%	25%	28%	19%
UU proposed level	65%	66%	60%	67%	<b>59%</b> <j	70%	65%	68%	64%	<b>81%</b> >e
Lower level	10%	7%	12%	7%	7%	9%	<b>14%</b> >j	7%	7%	0% <g

## Investment choice: subgroup analysis

A plurality of micro businesses and majority of small and large businesses opt for United Utilities' proposed level of investment. However, medium businesses are split evenly between preferring the higher and proposed levels of investment. Support for the lower level of investment is predominantly driven by micro businesses.



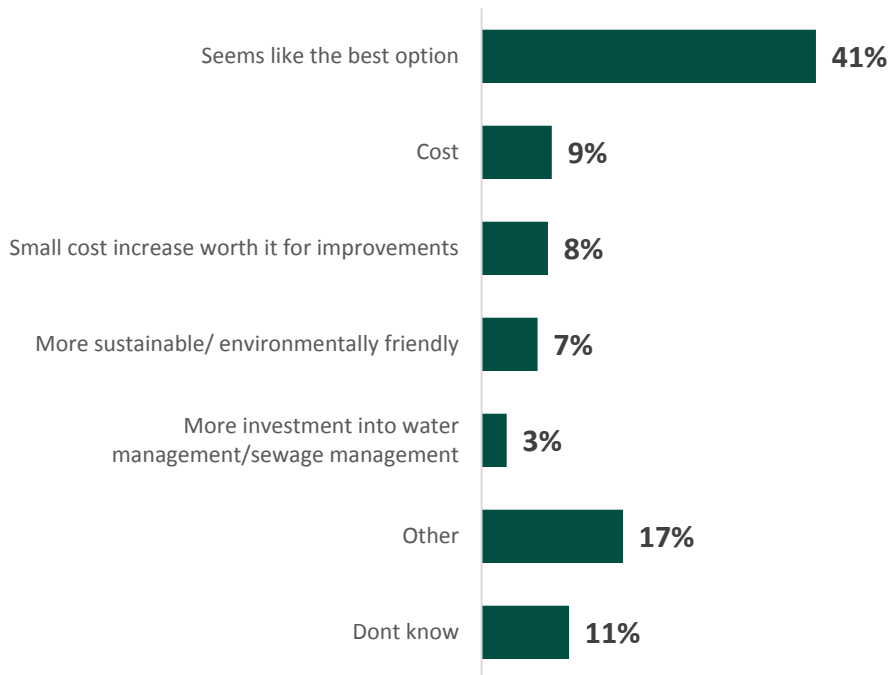
# Adherence with United Utilities' proposed levels of investment

A feeling that the United Utilities' proposed level is the best plan is by far the most popular justification.

67%

Agree with United Utilities' proposed level.

## Top reasons for selecting the UU proposed level of investment



## Qualitative findings

Only one of the five qualitative respondents opted for United Utilities' proposed level of investment...

"The predicted change in the average bill is not a lot really. It's got low water pollution to the environment. The carbon footprint doesn't really worry me... climate change is never going to be sorted in my lifetime so it's not my immediate worry. As long as I've got clean water and a low risk of flooding. I don't want to pay a huge amount for water per month so I don't want to see a large increase."

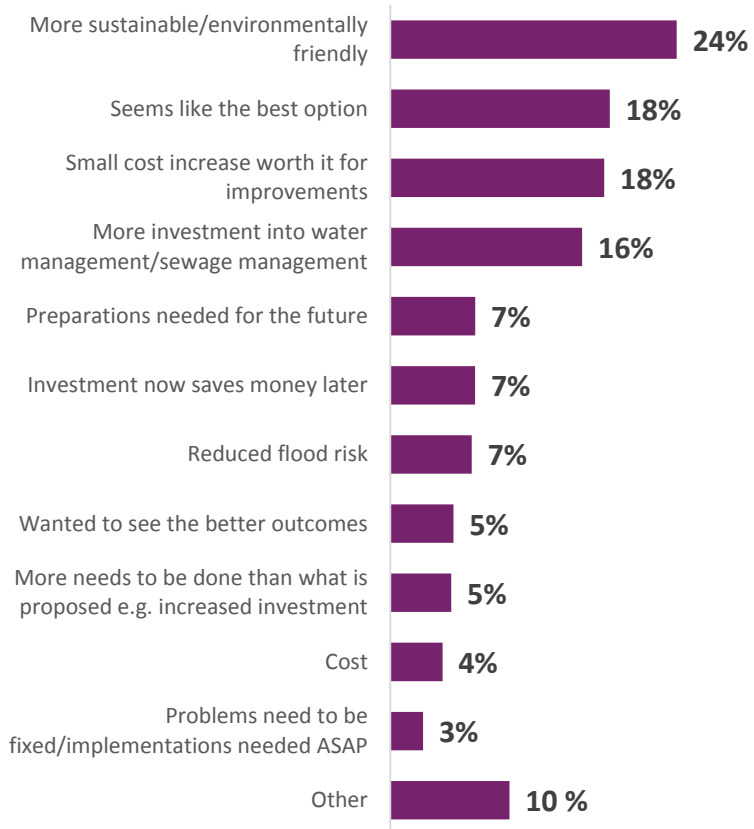
**Male, 35-55, struggling with household bills**



# Adherence with United Utilities' proposed levels of investment

Wanting a more sustainable/environmentally friendly option is the top reason for selecting the higher level of investment, while cost is the main driver of selecting the lower level.

## Top reasons for selecting higher level of investment



## Qualitative findings

Four of the five depth respondents opted for the higher level of investment.

"I see that as a short-term pain. Because once the improvements are made, we shouldn't continue to see these massive jumps"

**Male, 35-55**

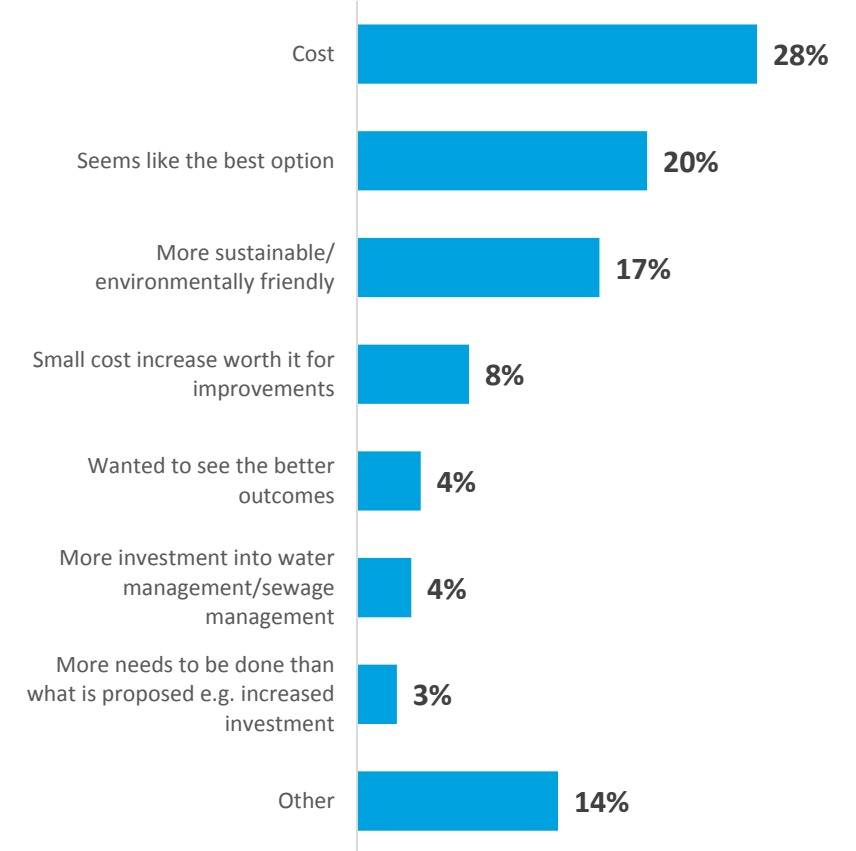
"It's something that's got to be done so why not get the maximum benefits?"

**Transgender, 35-55**

"There is going to be a carbon footprint until we start switching to better ways of generating energy. It's always going to be high. But I would much rather see the environment and social benefits being higher."

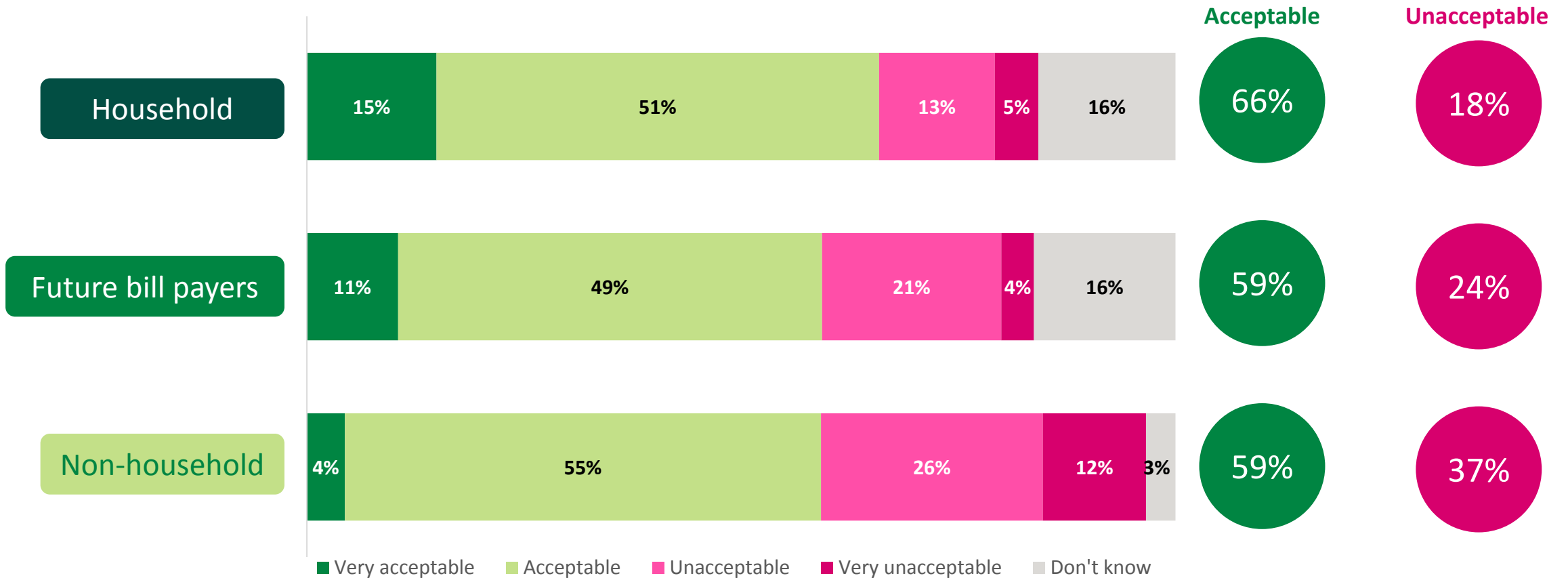
**Male, 35-55**

## Top reasons for selecting lower level of investment



# Plan acceptability

United Utilities' plan has a strong level of acceptability across all three segments, although this is mainly driven by 'acceptable' rather than 'very acceptable' ratings. These three acceptable figures average out at 61%. Meanwhile, non-households are most likely to feel the plan is unacceptable.



## Plan acceptability: subgroup analysis (I)

Plan acceptability is strong across most subgroups, although there are some variations...

	Metered (a)	Unmetered (b)	Cumbria (c)	Merseyside (d)	Greater Manchester (e)	Lancashire (f)	Cheshire (g)
Acceptable	70% >b	62% <a	64%	58% <f	67%	71% >d	66%
Unacceptable	19%	18%	18%	27% >ef	16% <d	14% <d	20%

	Inner-city (a)	Suburban (b)	Town (c)	Village/rural or countryside (d)	No formal qualifications* (e)	GCSEs/A-levels (f)	Degree or higher (g)
Acceptable	65%	61%	69%	70%	49%	66%	67%
Unacceptable	20%	22% >c	14% <b	20%	13%	18%	20%

	AB (a)	C1 (b)	C2 (c)	DE (d)	Never struggle with bills (e)	Sometimes struggle with bills (f)	Struggle and often behind with bills (g)	Always struggle with bills (h)
Acceptable	64%	66%	71%	63%	69% >h	67%	63%	52% <e
Unacceptable	24% >c	19%	11% <a	18%	17%	18%	19%	26%

# Plan acceptability: subgroup analysis (II)

Plan acceptability is strong across most subgroups, although there are some variations...

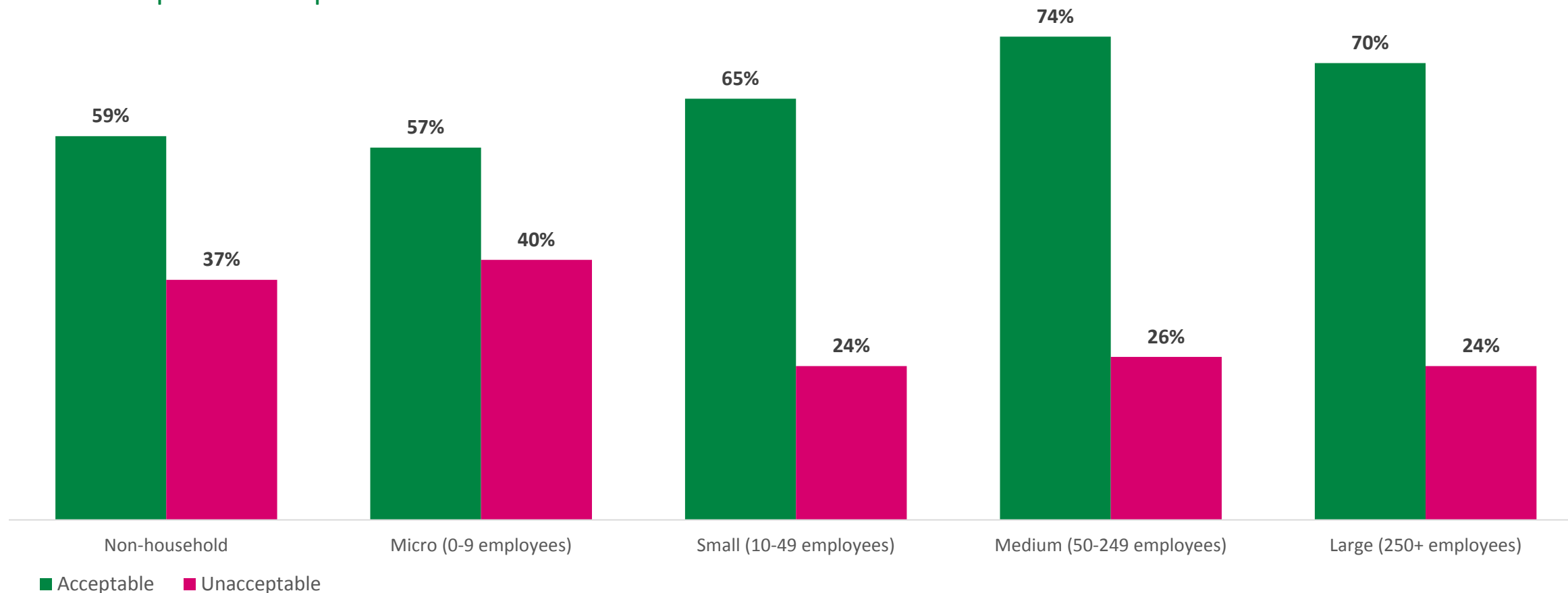
	HH income <£21k (a)	HH income ≥ £21k (b)	18-34 (c)	35-44 (d)	45-64 (e)	65+ (f)	Male (g)	Female (h)	Disability/ long-term illness in HH (i)	No disability/ long-term illness in HH (j)
<b>Acceptable</b>	67%	67%	67%	<b>52%</b> <ef	<b>67%</b> >d	<b>73%</b> >d	67%	65%	65%	67%
<b>Unacceptable</b>	18%	19%	20%	23%	18%	14%	20%	17%	22%	16%

	Not concerned by flooding (a)	Concerned by flooding (b)	Experience any type of sewer flooding (c)	Not experienced any type of sewer flooding (d)	Visit blue space – at least weekly (e)	Visit blue space – at least fortnightly-monthly (f)	Visit blue space – quarterly (g)	Visit blue space – yearly (h)	Visit blue space – less frequently (i)	Visit blue space – never (j)
<b>Acceptable</b>	63%	70%	65%	67%	66%	68%	<b>60%</b> <i	64%	<b>77%</b> >g	65%
<b>Unacceptable</b>	19%	20%	23%	17%	19%	<b>20%</b> >i	<b>28%</b> >ij	<b>25%</b> >ij	<b>10%</b> <fgh	<b>8%</b> <gh

Significant differences represented by column letters and are highlighted by bold, blue text.  
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## Plan acceptability: subgroup analysis

Regardless of business size, the majority find United Utilities' plan acceptable with the highest agreement levels found within medium and large size organisations. It should be noted, however, that two in five micro businesses deem the plan unacceptable.



# Reasons for plan acceptability rating

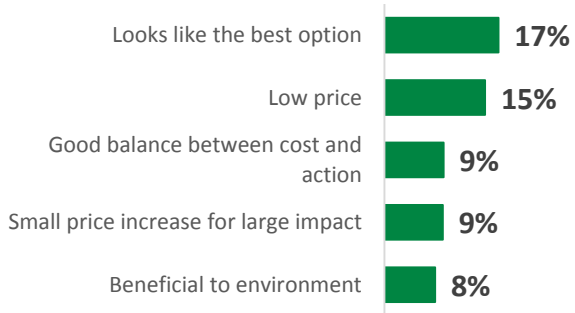
The top reasons for thinking United Utilities’ plan is acceptable is a feeling that it is the best option and that the price increases are worth it for the improvements. The minority who feel it is unacceptable tend to feel more should be done for the environment or do not approve of the cost implications.

## Household

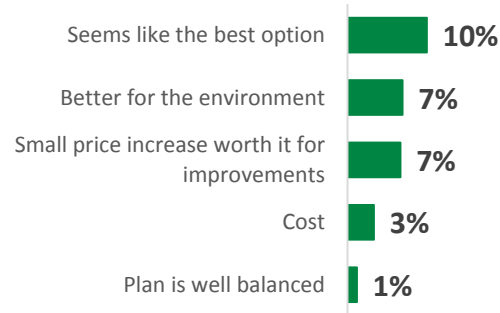
## Future bill payers

## Non-household

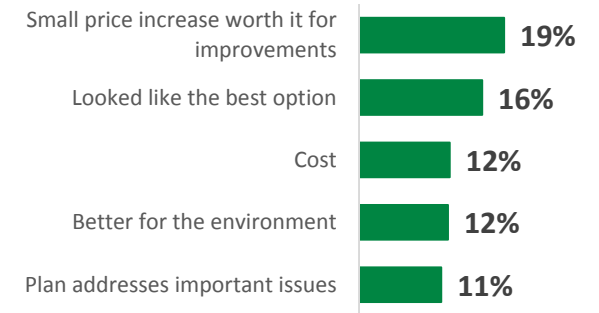
Reason(s) United Utilities’ plan is acceptable (top 5)



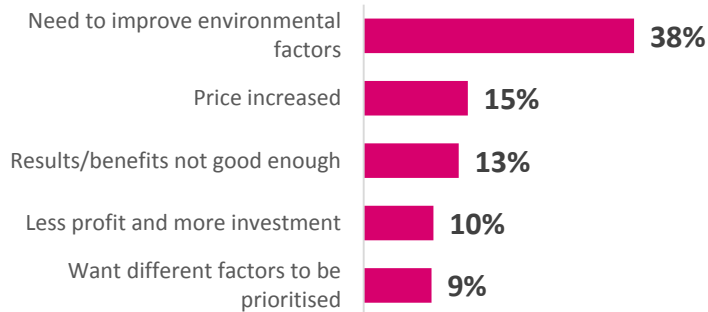
Reason(s) United Utilities’ plan is acceptable (top 5)



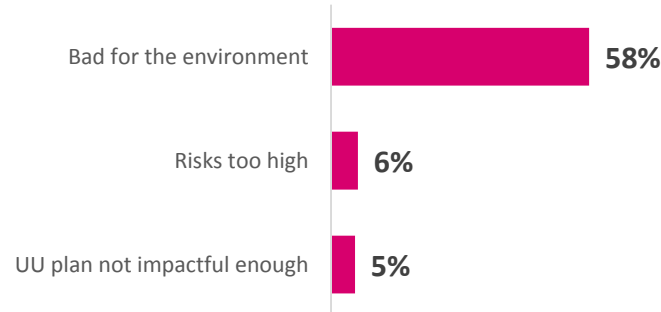
Reason(s) United Utilities’ plan is acceptable (top 5)



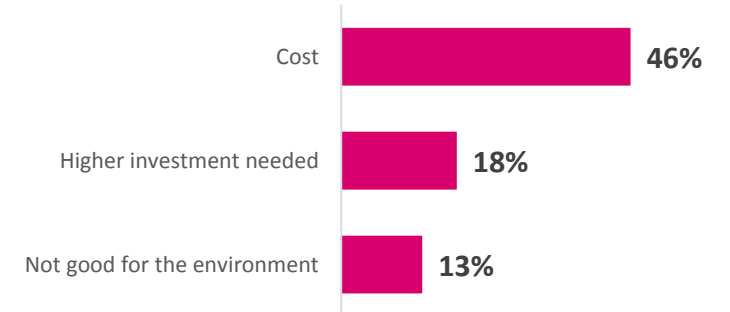
Reason(s) United Utilities’ plan is unacceptable (top 5)



Reason(s) United Utilities’ plan is unacceptable\*



Reason(s) United Utilities’ plan is unacceptable

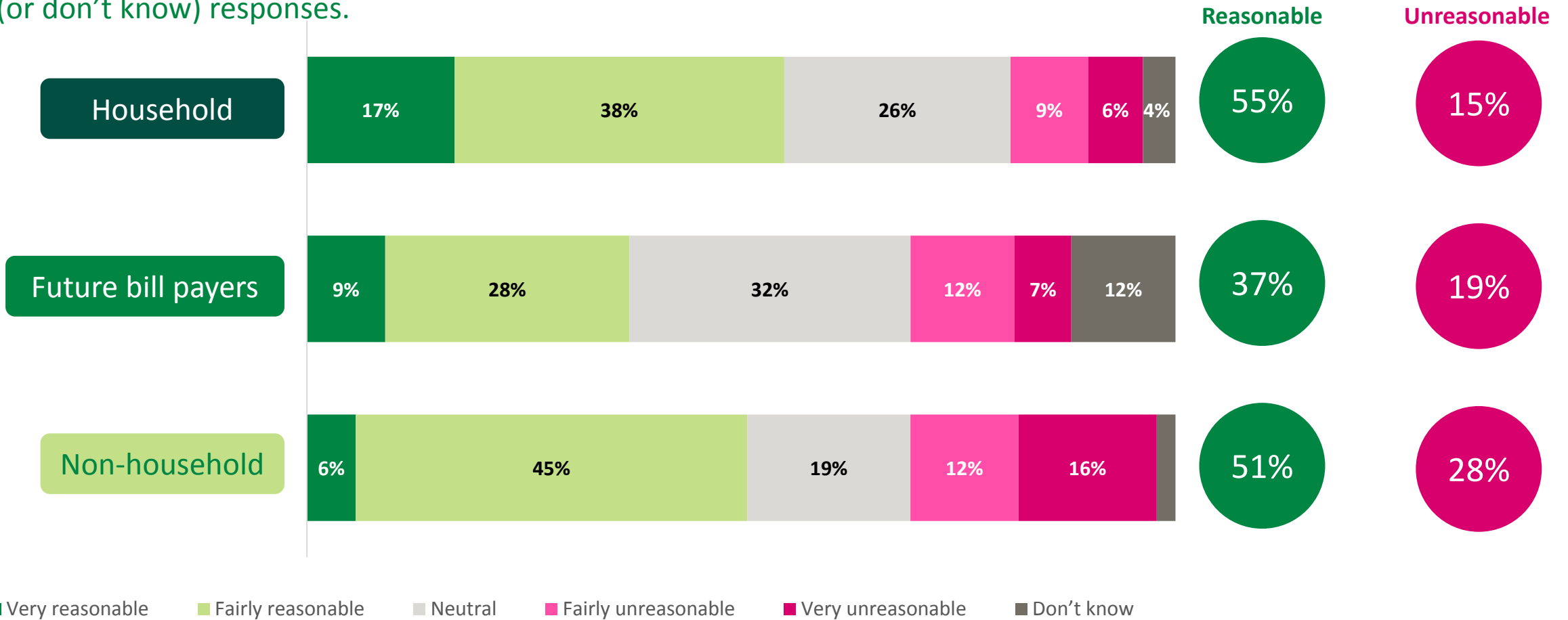


Q13C/D.. What is the main reason you think the proposed plan is acceptable/unacceptable? Base: acceptable 373 / unacceptable 104 (HH), acceptable 61 / unacceptable 26\* (FBP), acceptable 102 / unacceptable 45 (NHH)

\*Caution: low base size <30. Please note that there is a higher base size for ‘acceptable’ charts compared to the ‘unacceptable’ charts because the majority find United Utilities’ plan acceptable.

# How reasonable bill increases mentioned in the exercise are...

More than half of HH and NHH customers feel that the bill increases proposed are reasonable given the other bill increases they have experienced recently. Agreement with this is lower among future bill payers due to more neutral (or don't know) responses.



Q15.. Taking into account other bill increases you may have experienced recently (e.g. energy bills), how reasonable do you feel that the bill increases mentioned in the exercise were?

Base: all respondents

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## Reasonableness of bill increases: subgroup analysis (I)

In most subgroups, a majority feel that the bill increases in the exercise are reasonable.

	Metered (a)	Unmetered (b)	Cumbria (c)	Merseyside (d)	Greater Manchester (e)	Lancashire (f)	Cheshire (g)
Reasonable	59%	51%	57%	58%	56%	54%	49%
Unreasonable	13%	17%	12%	19%	14%	15%	15%

	Inner-city (a)	Suburban (b)	Town (c)	Village/rural or countryside (d)	No formal qualifications (e)	GCSEs/A-levels (f)	Degree or higher (g)
Reasonable	48%	57%	54%	58%	54%	54%	58%
Unreasonable	<b>28%</b> >bcd	<b>14%</b> <a	<b>14%</b> <a	<b>13%</b> <a	13%	16%	14%

	AB (a)	C1 (b)	C2 (c)	DE (d)	Never struggle with bills (e)	Sometimes struggle with bills (f)	Struggle and often behind with bills (g)	Always struggle with bills (h)
Reasonable	61%	52%	55%	53%	<b>62%</b> >gh	<b>57%</b> >gh	<b>41%</b> <ef	<b>30%</b> <ef
Unreasonable	12%	18%	12%	17%	<b>11%</b> <gh	14%	<b>26%</b> >e	<b>25%</b> >e



## Reasonableness of bill increases: subgroup analysis (II)

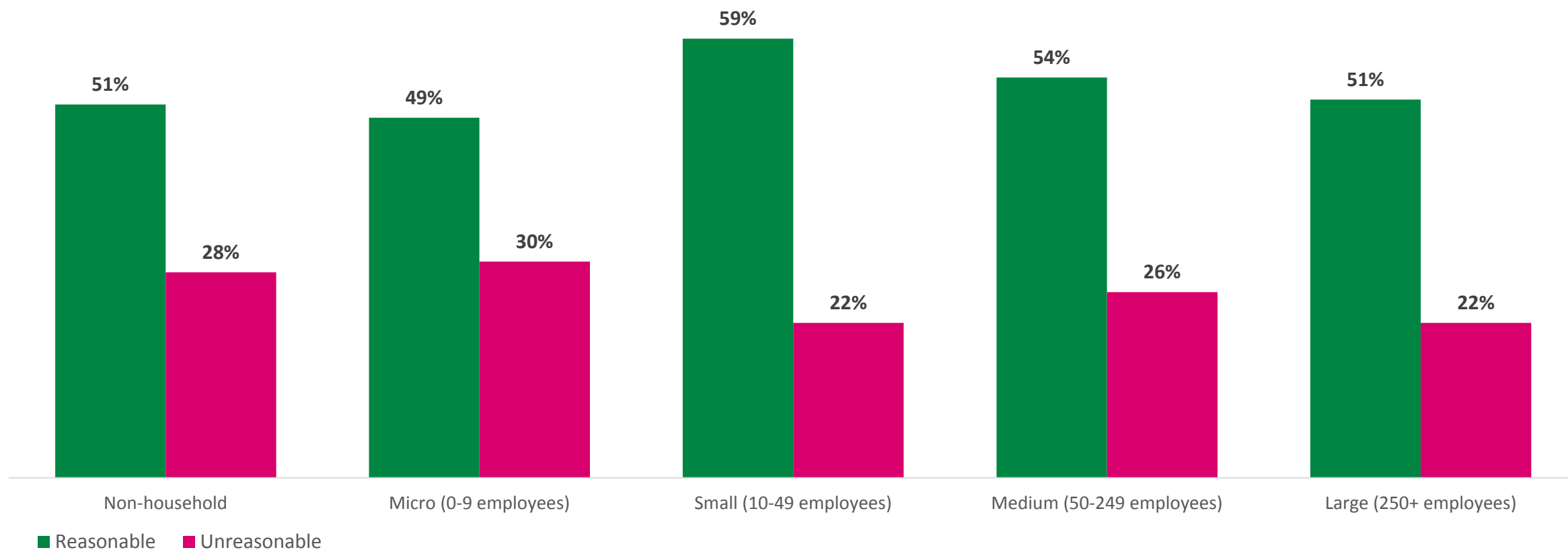
In most subgroups, a majority feel that the bill increases in the exercise are reasonable.

	HH income <£21k (a)	HH income ≥ £21k (b)	18-34 (c)	35-44 (d)	45-64 (e)	65+ (f)	Male (g)	Female (h)	Disability/ long-term illness in HH (i)	No disability/ long-term illness in HH (j)
<b>Reasonable</b>	<b>49%</b> <b	<b>62%</b> >a	<b>59%</b> >d	<b>38%</b> <cef	<b>56%</b> >d	<b>63%</b> >d	54%	56%	56%	56%
<b>Unreasonable</b>	18%	12%	12%	<b>22%</b> >f	15%	<b>13%</b> <d	16%	14%	17%	13%

	Not concerned by flooding (a)	Concerned by flooding (b)	Experienced any type of sewer flooding (c)	Not experienced any type of sewer flooding (d)	Visit blue space – at least weekly (e)	Visit blue space – at least fortnightly-monthly (f)	Visit blue space – quarterly (g)	Visit blue space – yearly (h)	Visit blue space – less frequently (i)	Visit blue space – never (j)
<b>Reasonable</b>	<b>48%</b> <b	<b>60%</b> >a	61%	55%	<b>60%</b> >j	<b>62%</b> >j	51%	56%	54%	<b>40%</b> <ef
<b>Unreasonable</b>	22%	15%	16%	15%	14%	12%	16%	19%	18%	19%

## Reasonableness of bill increases: subgroup analysis (I)

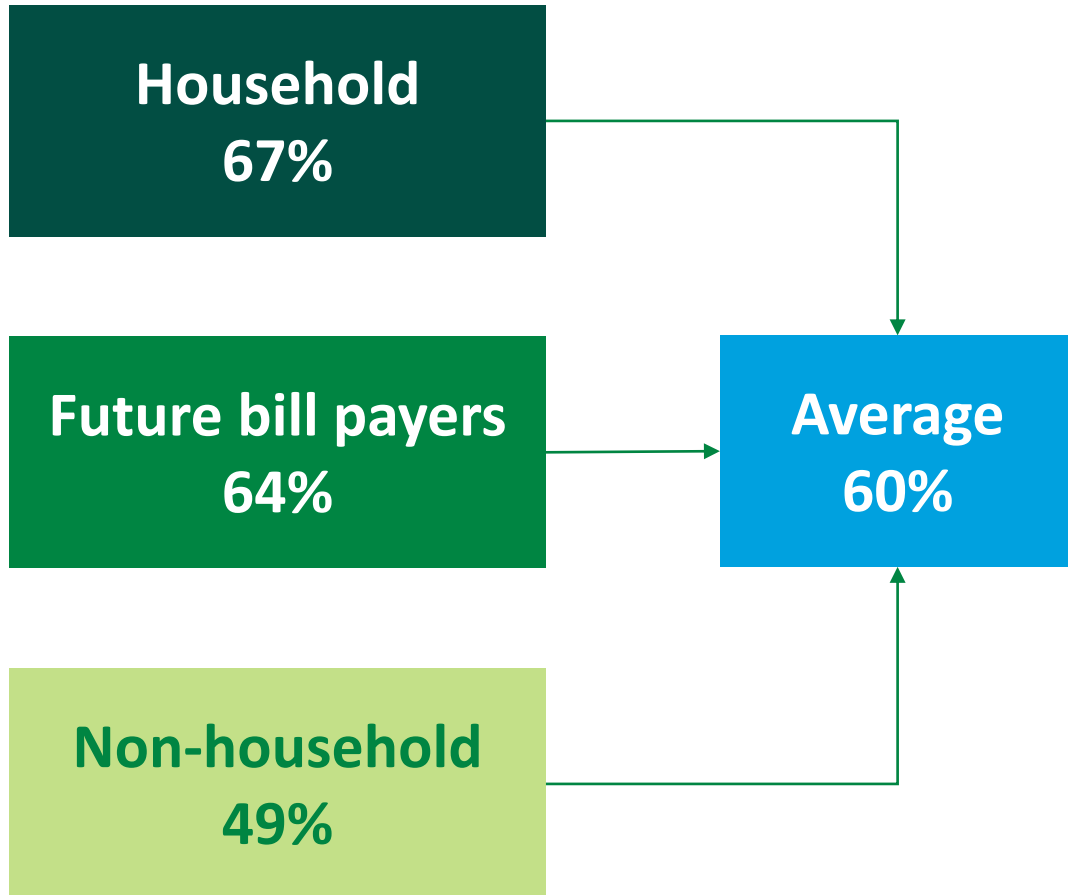
Almost fifty percent of micro businesses, and over half of all other sizes of business, feel that United Utilities' plan is acceptable.



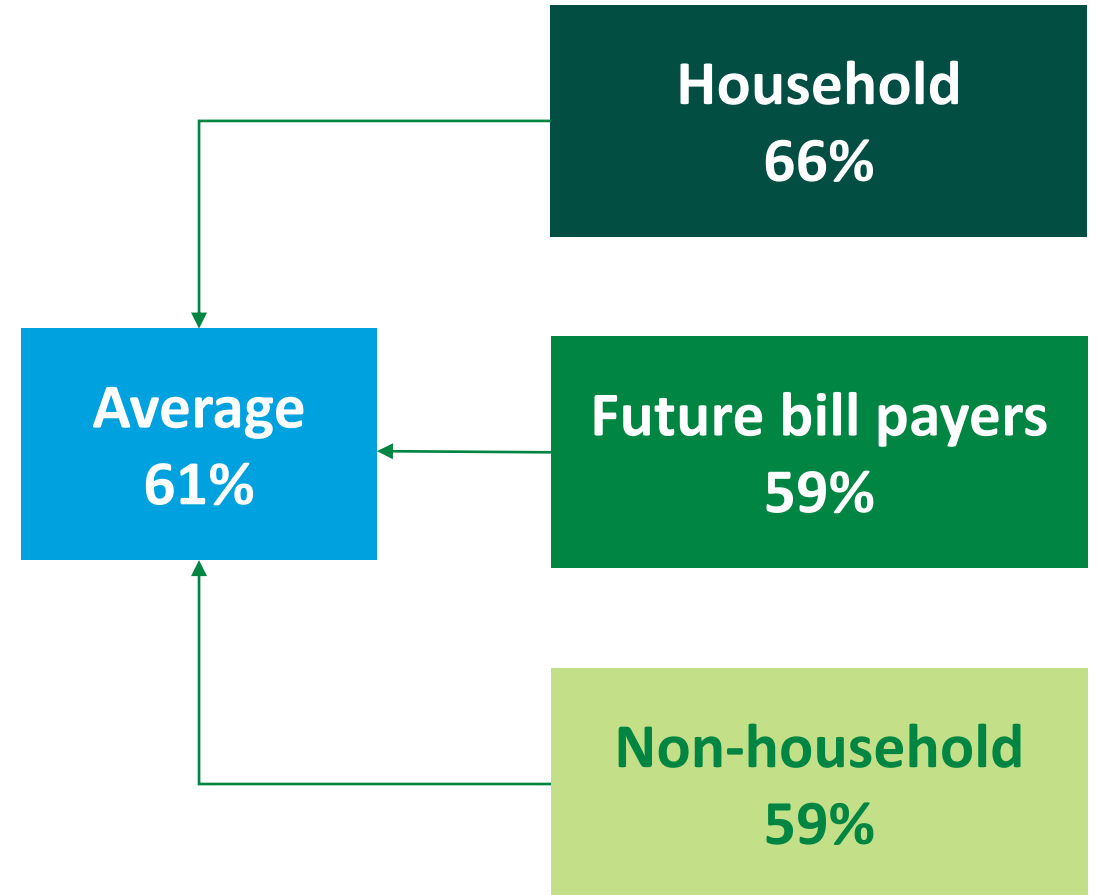
# Summary

# Key findings

**% selecting proposed level of investment**



**% who think proposed level of investment is acceptable**



# Ofwat standards for high-quality research

Ofwat have set out requirements for High Quality Research in their [Customer Engagement Policy](#). Overall, water company research and engagement should follow best practice and lead to a meaningful understanding of what is important to customers and wider stakeholders.

## Useful and contextualised

This research was conducted in order to test United Utilities' DWMP with customers and future bill payers and assess whether tweaks need to be made ahead of the plan's submission.

## Fit for purpose

This research followed a similar methodology employed in the first wave United Utilities' DWMP acceptability testing. During the design phase for wave one, cognitive testing was carried out to ensure the complex subject matter was presented in a way which was as understandable and engaging as possible for respondents. This wave was simplified further by reducing the number of choices available, allowing respondents to engage more deeply with the choice exercise.

## Ethical

This research was conducted by DJS Research who are a member of the Market Research Society. Respondents were reassured that their responses would be anonymous, encouraging them to be as open and honest as possible.

## Independently assured

The research was conducted by DJS Research, an independent market research agency. United Utilities shared the methodology and results with Your Voice, the Independent Challenge Group.

## Neutrally designed

Every effort has been made to ensure that the research is neutral and free from bias. Where there is the potential for bias, this has been acknowledged in the report.

## Inclusive

A mix of online and face-to-face interviews were conducted to ensure that digitally vulnerable and hard-to-reach customers were included in the research. Quotas were set based on the known profile of United Utilities' customers and weighted to mitigate variations in the sample population.

## Continual

This is the second wave of research into DWMP acceptability. The findings from the first wave contributed to the design of choices respondents were presented with in this wave.

## Shared in full with others

The research is published and shared on United Utilities' website and through industry customer insight newsletter, The Source.

# For more information

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