



Accent

Acceptability and Affordability Testing Quantitative Fieldwork

Final Report

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1 Executive Summary

1.1 Assurance Statement

This fieldwork was conducted in accordance with the requirements of the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

1.2 Methodology and Fieldwork

Fieldwork for the research was carried out between 18th August and 19th September 2023. A total of 1,580 interviews were achieved overall.

1,374¹ Household (HH) interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). Of these 939 were in the Anglian dual supply area, 204 in the ESW Anglian area and 231 in the Hartlepool area. 799 interviews were generated by an email approach (620 in the Anglian dual supply area, 107 in the ESW Anglian area and 72 in the Hartlepool area), 575 by post (319 in the Anglian dual supply area, 97 in the ESW Anglian area and 159 in the Hartlepool area).

206² Non-Household (NHH) interviews were conducted - 203 via a specialist panel, 3 by CATI. They were split 101 in the Anglian dual supply, 51 in the ESW Anglian area, and 54 in the Hartlepool area.

1.3 Summary of Results

Economic Outlook

The economic situation for households in particular was found to be tough – with 33% of households reporting having had at least some difficulty with paying household bills (with 12% of households stating that it was very or fairly difficult to manage financially). 36% expect their financial situation to worsen in the next few years.

The economic situation for businesses seemed almost as pressured – with 34% of non-household participants reporting at least some difficulty paying bills and 44% finding it difficult to manage financially now. However, the outlook was better, with 62% of businesses expecting the situation to improve and just 22% expecting it to worsen.

¹ Against an Ofwat/CCW mandated minimum of 500

² Against an Ofwat/CCW mandated minimum of 200 for WASCs

Affordability

Overall, over 1 in 5 participants (22%) said it would be fairly or very easy to afford the proposed bill (19% of households and 29% of non-households). 33% of participants (36% of households and 26% of non-households) stated that the bill increase would be neither easy nor difficult to afford. 42% of participants (42% of households and 43% of non-households) said the bill increases would be either fairly or very difficult to afford.

Lower income households found the bills particularly difficult to afford, with over half of households with an income under £25,999 finding the increases very or fairly difficult to afford. The number of those saying the bill was fairly or very easy to afford was significantly higher amongst metered users (21%) than unmetered users (13%).

Acceptability

The proportion of participants that found the proposed bill acceptable or completely acceptable was 73% overall, with 16% labelling the plan unacceptable or completely unacceptable, and 11% not knowing/unable to say.

69% of household participants found the plan acceptable (either fairly or very), with 17% finding the plan unacceptable and 14% unable to say. Customers that found the plan acceptable support what Anglian Water is trying to do long term (54%), feel like their plans are focusing on the right services (44%) and trust Anglian to do what is best for their customers (25%). The main reasons for household participants finding the plan unacceptable were mainly financially driven; with the bill increase being too expensive (42%); companies should pay for the improvements (33%); and company profits are too high (30%), being the top three responses.

The number of non-household participants that found the plan acceptable or completely acceptable was significantly higher than households at 84% (and correspondingly a lower percentage of non-households stating that the plan was unacceptable (13%)). Significantly fewer non-households (2%) than households were unable to say. Like household customers, businesses find the plan acceptable because they support what Anglian Water are trying to do long term (61%), feel Anglian Water plans focus on the right services (44%) and they trust them to do what is best for their customers (27%). Again, the main reasons for non-household unacceptability were similar to those of household customers, with the top 3 reasons being: The bill increase being too expensive (59%); companies should pay for the improvements (26%); company profits were too high (23%), being the top three responses.

Top Priorities for investment

Reducing leakage was the top water related investment priority for both household participants (49%) and non-household participants (40%). Preventing issues with the quality of water was second with similar proportion of household (34%) and non-household (31%) customers choosing it. Reducing the duration of interruptions was rated third for both household (12%) and non-household (29%) participants.

Reducing the number of pollution incidents was the top wastewater related priority overall, and it was chosen by 60% of household participants and 56% of non-household

participants. Reducing internal sewer flooding was second for both household (25%) and non-household customers (28%). Sewage flooding gardens and outbuildings was rated third for both household (9%) and non-household (15%).

The six enhancement cases were presented in two banks of three cases each. The first 3 cases were:

- Improving drinking water quality
- Climate resilience and net zero
- Managing droughts and ensuring sufficient water for all

Managing droughts and ensuring sufficient water for all was chosen by 58% of household participants and 45% of non-household participants as being most important. This was followed by improving the quality of drinking water (24% of households and 34% of non-households) and climate resilience and net zero (18% of households and 21% of non-households)

The first 3 cases were:

- Reducing spills
- Environmental ambition
- Managing growth

Environmental ambitions (45% of participants; 44% of households and 46% of non-households) and reducing spills (44% of participants; 45% of households and 43% of non-households) were chosen as almost equal top overall. Managing growth was third most chosen (by 11% of households and non-household participants).

Intergenerational Fairness

Both household and non-household audiences would prefer increases to start sooner and be better spread across different generations of bill payers (47% and 50% of responses respectively).

A remarkably large proportion of household customers (36%) said they didn't know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.

Just 17% of household participants, and 27% of non-household participants, chose to delay increases and pass more of them on to younger and future bill payers.

Additional questions

Alongside the mandated questions, Anglian Water also asked an additional question at the end of the survey to dive deeper into the reason behind the participants' answer. It was found that 75% of household participants and 68% of non-household participants answered the question based solely on their household or business' financial situation (as opposed to

Additional Survey

Anglian also ran a complementary “shadow” survey, mirroring the Acceptability and Affordability survey in terms of methodology, sampling, quotas and weighting.

In this survey, participants were shown the plan components, then asked a single acceptability question that included the bill increase. It was found that by giving participants more information, 68% of households and 76% of non-household customers found the proposed plan (including associated bill increase) acceptable.

2 INTRODUCTION

2.1 Background

Ofwat's customer engagement policy paper sets out its expectations of what companies engagement with customers should look like as they develop their PR24 Business plan and Long-Term Delivery Strategy (LTDS). As part of this, all water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting in October 2023 their plans for the upcoming Price Review (PR24).

To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken. This guidance has been designed to facilitate consistency and comparability between companies (e.g. question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme).

Anglian Water have commissioned Accent to carry out the quantitative component of affordability and acceptability testing (AAT) with their customers. This report represents the findings from the quantitative stage.

2.2 Objectives

The overarching objective of this research is to measure customer support for the PR24 Business Plan.

More specifically, the research aims to:

- Ensure that customers' priorities and preferences are driving Anglian Water PR24 investment plan decisions where appropriate.
- Provide evidence to demonstrate that customers consider the forecast bill impacts to be acceptable, including on affordability, levels of service and operational risk in the short and long term.
- Demonstrate that the engagement with customers reflects the potential affordability impacts.
- Measure intergenerational fairness attitudes when it comes to bill increases and investment.
- Follow the prescribed Ofwat/CCW guidance.

2.3 Report Structure

This document is the report on the quantitative stage of the affordability and acceptability testing for Anglian Water. This report describes survey design and

methodologies alongside customers' view on the affordability and acceptability of Anglian Water' AMP8 business plan.

Accent conforms to the requirements of the quality management system ISO 20252:2019.

2.4 Economic/media backdrop

This research was conducted against a backdrop of difficult circumstances for the economy, and with the water industry repeatedly making headline news for negative reasons.

Since late 2021, a large proportion of the UK population has been feeling the effects of the cost-of-living crisis. This has meant that households typically have less disposable income and Anglian Water customers may be feeling more financially squeezed than normal.

Throughout the year of 2023, media coverage has been focussed on stories of water companies releasing raw sewage into the UK waterways.

In reaction to this, a number of actions were taken within the industry:

- A number of water service provider CEOs declined to accept their contracted bonuses (water company exec bonuses having been subject to much media scrutiny and public discontent)
- A joint apology was offered to the public for not acting quickly enough to prevent sewage spills, with a promise to increase investment to prevent spills in future to £10bn by 2030. However, some criticism was received due to this increased investment being funded by customers' bills
- In June 2023, the ASA banned an Anglian Water advertisement regarding making positive environmental claims as it omitted to mention the company's history of sewage spills
- At the end of June 2023, the CEO of Anglian Water resigned and it was revealed that the company was in £14bn of debt and there were fears it was on the verge of collapse
- On August 9th the news headlines featured 6 water companies which could be facing £800m in lawsuits over allegations of underreporting pollution incidents and overcharging customers.

3 METHODOLOGY

3.1 Introduction

Generally speaking the methodology was heavily prescribed, by the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

Having said that, the guidance changed and was clarified frequently throughout the research period. In all respects (unless documented within this report) the guidance in effect at the time was consistently followed.

Anglian Water’s Independent Challenge Group (ICG) was informed and consulted throughout the research process, including inception, design, and fieldwork.

3.2 Cognitive testing

Comprehensive cognitive testing was carried out. 8 cognitive interviews with household customers were carried out using Zoom with the participant filling in the online survey and an Accent moderator observing and probing.

Findings were presented to Anglian Water’s ICG, and all changes resulting from the cognitive testing process were implemented with ICG approval. Full report can be found in Appendix G.

3.3 Sampling and approach

Household (HH) sampling

The Anglian Water area was treated as three locations – the first location is the area supplied both clean water and wastewater services by Anglian Water (“Anglian Dual”), the second where the wastewater services are provided by Anglian Water but the clean water by Essex & Suffolk Water (“ESW Anglian”), and the third where the area is supplied clean water only by Hartlepool Water (“Hartlepool”). The first two are the only supply areas that meet the criteria for mandatory inclusion under Ofwat/CCW’s guidance (namely that they make up over 10% of Anglian Water’s customer base). The third, Hartlepool, was included voluntarily, to ensure the views of this very different supply area were represented.

The target number of interviews was 1200³ (800 Dual, 200 each for ESW and Hartlepool). Recruitment was conducted using Anglian Water customer lists with flags for priority service register (PSR) and social tariff.

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation. Primarily, the recruitment used a push-to-web approach with online survey links and QR codes provided in the letter and email invitations. Participants were also offered the opportunity to make any accessibility requests (including requesting a paper version of the questionnaire to fill in and post back) – 59 such requests were received and honoured (41 in Anglian Dual, 6 in ESW Anglian, 12 in Hartlepool).

The guidance mandates that areas of differing deprivation (as defined by the Index of Multiple Deprivation (IMD)) be boosted or suppressed by certain percentages, to account for lower response rates amongst more deprived areas and their importance in the research. The process by which this component of the guidance was followed, was to effectively convert the percentage given in the guidance to an “adjustment factor”, to sample by IMD decile naturally (using a consistent assumed response rate) and then adjust the number of selections by the boost factor. Where the IMD decile was not known, no boost was applied. The calculations used to define the universe for the research (and from which all sub-sampling was conducted), follows:

Dual Anglian area

IMD Decile	Domestic Properties Supplied	Percentage:	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Ofwat adjustment factor	Sample to be drawn (adjusted)
1	83906	5.46%	44	3%	1456	1.25	1820
2	113027	7.35%	59	3%	1961	1.25	2452
3	131757	8.57%	69	3%	2286	1.1	2515
4	144812	9.42%	75	3%	2513	1.1	2764
5	147969	9.63%	77	3%	2568	1	2568
6	199294	12.97%	104	3%	3458	1	3458
7	182926	11.90%	95	3%	3174	0.9	2857
8	196241	12.77%	102	3%	3405	0.9	3065
9	193087	12.56%	101	3%	3351	0.75	2513
10	134380	8.74%	70	3%	2332	0.75	1749
Unknown	9367	0.61%	5	3%	163	1	163
TOTAL	1536766		800		26667		25922

³ The minimum sample size listed in the guidance issued by Ofwat and CCW was 500.

ESW Anglian

IMD Decile	Domestic Properties Supplied	Percentage:	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Ofwat adjustment factor	Sample to be drawn (adjusted)
1	25599	6.16%	12	3%	411	1.25	513
2	28114	6.76%	14	3%	451	1.25	564
3	41457	9.97%	20	3%	665	1.1	731
4	46719	11.24%	22	3%	749	1.1	824
5	55647	13.39%	27	3%	892	1	892
6	38369	9.23%	18	3%	615	1	615
7	39616	9.53%	19	3%	635	0.9	572
8	44515	10.71%	21	3%	714	0.9	642
9	49252	11.85%	24	3%	790	0.75	592
10	44513	10.71%	21	3%	714	0.75	535
Unknown	1915	0.46%	1	3%	31	1	31
TOTAL	415716		200		6667		6513

Hartlepool

IMD Decile	Domestic Properties Supplied	Percentage:	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Ofwat adjustment factor	Sample to be drawn (adjusted)
1	13636	38.64%	77	3%	2576	1.25	3220
2	5569	15.78%	32	3%	1052	1.25	1315
3	2999	8.50%	17	3%	567	1.1	623
4	1652	4.68%	9	3%	312	1.1	343
5	2224	6.30%	13	3%	420	1	420
6	550	1.56%	3	3%	104	1	104
7	3076	8.72%	17	3%	581	0.9	523
8	2473	7.01%	14	3%	467	0.9	420
9	2435	6.90%	14	3%	460	0.75	345
10	577	1.64%	3	3%	109	0.75	82
Unknown	98	0.28%	1	3%	19	1	19
TOTAL	35289		200		6667		7414

This ensured that the selection (a) matched the profile of the Anglian Water area, and (b) boosted each IMD decile appropriately in line with the guidance.

Sample selection was restricted to 'occupied' households billed for more than 2 months, where the customer had been in occupation for more than 1 year. The bills were extrapolated to a full year, and exceptional values excluded. The billing records for the selected customer samples by service were rationalised on a per customer basis to remove premises that exceeded the reasonable maximum extrapolated annual charge, based on the threshold used for the corroboration of the measured income accrual reported in the year end accounts.

No quotas were set (in line with the Ofwat and CCW guidance).

Household (HH) Fieldwork

An initial sample was drawn from the universe, based on a much more optimistic response rate (4.5%, based on previous comparable work), to ensure we did not invite more participants than was necessary. The proportions by IMD decile as defined above, were maintained. Records with an email address were sent a single email, records without, a letter.

Responses to these mailings follow:

Anglian Dual

Interviews wanted	800				
Assumed %	4.50%				
n=	17778				
IMD Decile	Total	email	Post	Total	
1	1248	727	512	1239	
2	1681	979	686	1665	
3	1725	1066	651	1717	
4	1896	1198	689	1887	
5	1761	1075	675	1750	
6	2372	1470	897	2367	
7	1959	1206	745	1951	
8	2102	1289	807	2096	
9	1723	1036	685	1721	
10	1199	748	440	1188	
Unknown	111	99	9	108	
TOTAL	17778	10893	6796	17689	
Interviews after initial mailing		620	319	939	
Conversion rate after initial mailing		5.69%	4.69%	5.31%	

Anglian ESW

Interviews wanted	200				
Assumed %	4.50%				
n=	4444				
IMD Decile	Total	email	Post	Total	
1	350	181	169	350	
2	385	202	183	385	
3	499	246	253	499	
4	562	295	267	562	
5	609	308	301	609	
6	420	197	223	420	
7	390	181	209	390	
8	438	208	230	438	
9	404	192	212	404	
10	365	173	192	365	
Unknown	21	18	3	21	
TOTAL	4444	2201	2242	4443	
Interviews after initial mailing		107	97	204	
Conversion rate after initial mailing		4.86%	4.33%	4.59%	

Hartlepool

Interviews wanted	200				
Assumed %	4.50%				
n=	4444				
IMD Decile					
	Total		email	Post	Total
1	1930		801	1129	1930
2	788		301	487	788
3	374		125	249	374
4	206		92	114	206
5	252		95	157	252
6	62		13	49	62
7	313		107	206	313
8	252		85	167	252
9	207		73	134	207
10	49		14	35	49
Unknown	11		8	3	11
TOTAL	4444		1714	2730	4444
	Interviews after initial mailing		72	159	231
	Conversion rate after initial mailing		4.20%	5.82%	5.20%

We exceeded the full target of interviews in each area and hence did not require, nor therefore send, any reminders.

Non Household (NHH) sampling and fieldwork

A target of 200 Non-household interviews was set⁴.

A total of 206 interviews were obtained (101 in the Anglian dual supply, 51 in the ESW Anglian area, and 54 in the Hartlepool area). NHH bill-payers were recruited mainly via Quest Mindshare (a specialist NHH panel, 203 interviews) with a handful of CATI surveys (3).

CATI was abandoned early on as an approach, due to very poor response rates. Sample statistics follow:

Total records	Dead records	Live records	Recruits	Interviews
701	247	454	3	3

Survey

The questionnaire itself was generally tightly prescribed and in the main was implemented precisely as mandated.

There were two exceptions to this.

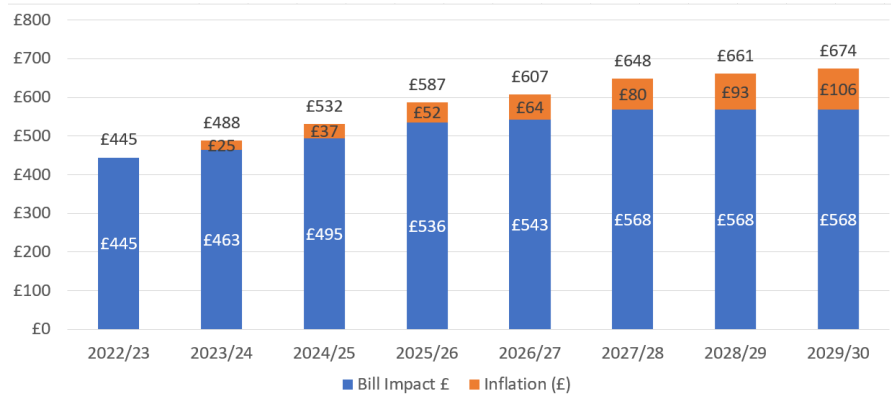
Firstly was the bill chart graph, where following cognitive feedback it was decided that it would benefit comprehension if a total (of bill impact plus inflation) were added

⁴ The minimum NHH sample size listed in the guidance is 200.

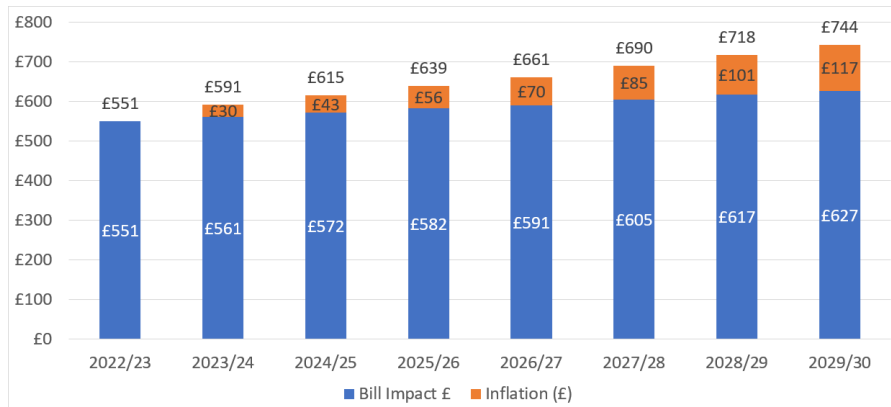
above each bar on the graph showing the impact of the plan on bills. This was added with the approval of Anglian Water’s Independent Challenge Group.

Examples follow (based on the average bill amount, and showing the actual increases tested).

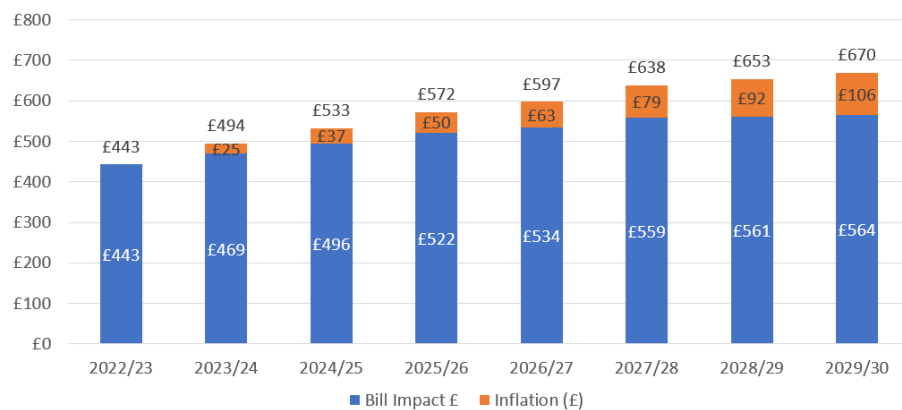
Dual Anglian:



ESW Anglian



Hartlepool



Secondly, immediately after Q5 (to use Guidance appendix F numbering) affordability of proposed bill and the subsequent question on what the participant felt they might need to do to pay for the increase, Anglian Water added a supplementary question: *“Thinking about the previous question, how much did you base your responses on the*

impacts of the proposed bills on your personal household/company/organisation finances and wider society?”, with a 1 to 5 scale running from “Only thinking about personal finances” to “only thinking about wider society”.

An additional question was asked after the main body of the survey. In the ESW and Hartlepool areas participants were shown a bill graph based on the wastewater/water only bill amount (to give Anglian Water some affordability feedback from the single supply areas, that is related only to the Anglian Water component of the bill). The addition of this question is in line with clarifications issued by Ofwat that supplement the guidance. The results of this questions were not used in the SUP14 data table submission.

3.4 Fieldwork dates

Household and Non-Household interviews took place simultaneously. Fieldwork commenced on the 18th of August 2023 and closed on the 19th of September.

3.5 Data processing

Once fieldwork was completed, the resulting dataset was cleaned to remove poor quality responses (including suspiciously low interview durations (speeders), those clearly choosing the first answer code in all questions even when that meant contradictor responses (straight liners), multiple responses from the same IP address etc).

As mandated by Ofwat, data was checked to ensure that no interview was completed in a time of less than 1/3 of the median interview duration.

Weighting

SPSS was used to run RIM weighting (Random Iterative Methods, or “Raking”).

HH survey responses were weighted to the following targets (using figures derived from neighbourhood level Census data (2021)):

IMD Decile	Dual	ESW	H'pool		Age	All regions
1	5.5%	6.2%	38.6%		Age 16 to 24	2.80%
2	7.4%	6.8%	15.8%		Age 25 to 34	13.00%
3	8.6%	10.0%	8.5%		Age 35 to 49	29.40%
4	9.4%	11.2%	4.7%		Age 50 to 64	27.10%
5	9.6%	13.4%	6.3%		Age 65 to 74	13.10%
6	13.0%	9.2%	1.6%		Age 75 and over	14.60%
7	11.9%	9.5%	8.7%			
8	12.8%	10.7%	7.0%		Gender	All regions
9	12.6%	11.9%	6.9%		Male	49.0%
10	8.7%	10.7%	1.6%		Female	51.0%
Unknown	0.6%	0.5%	0.3%		Total	100.0%
Total	100.0%	100.0%	100.0%			

NHH survey responses were weighted to the following targets (using data derived from BEIS (Department for Business, Energy and Industrial Strategy) 2022):

0 (sole trader)	15.00%
1 to 49	28.80%
50 to 249	11.40%
250+	44.80%

Next, the household and non-household datasets were merged to the following proportions based on total water usage of the two customer types, using data from table 6B of the water company's 2022/23 Annual Performance Report):

Water consumption	Hartlepool		Dual		ESW	
HH consumption (Ml/day)	13.65	59.74%	628.96	66.59%	318.13	81.46%
NHH Consumption (Ml/day)	9.2	40.26%	315.56	33.41%	72.41	18.54%
Total	22.85	100.00%	944.52	100.00%	390.54	100.00%

Finally, the three areas were merged together using the number of households served as the weighting factor:

	Domestic Properties	%
Dual	1536766	77.31%
ESW	415716	20.91%
Hpool	35289	1.78%
Total	1987771	100.00%

3.6 Note on data merging

Anglian Water initially commissioned Accent to test affordability and acceptability of the joint bill/plan in the Anglian dual supply and Hartlepool Water areas, and acceptability only of the wastewater only plan in the ESW Anglian area (in line with the guidance). However, affordability of the joint bill in the ESW area was tested – and following confirmation from ESW that they had tested the 'Water only' bill in the ESW Anglian area, the decision was taken to include the results of the combined bill affordability testing done in all three areas, in the company's report and SUP14 data table submission.

Therefore, for the purposes of this report (and the preparation of the SUP14 data for Anglian Water), unless specifically stated otherwise, all figures and analysis are based on the Anglian Dual, Hartlepool, and ESW merged datasets.

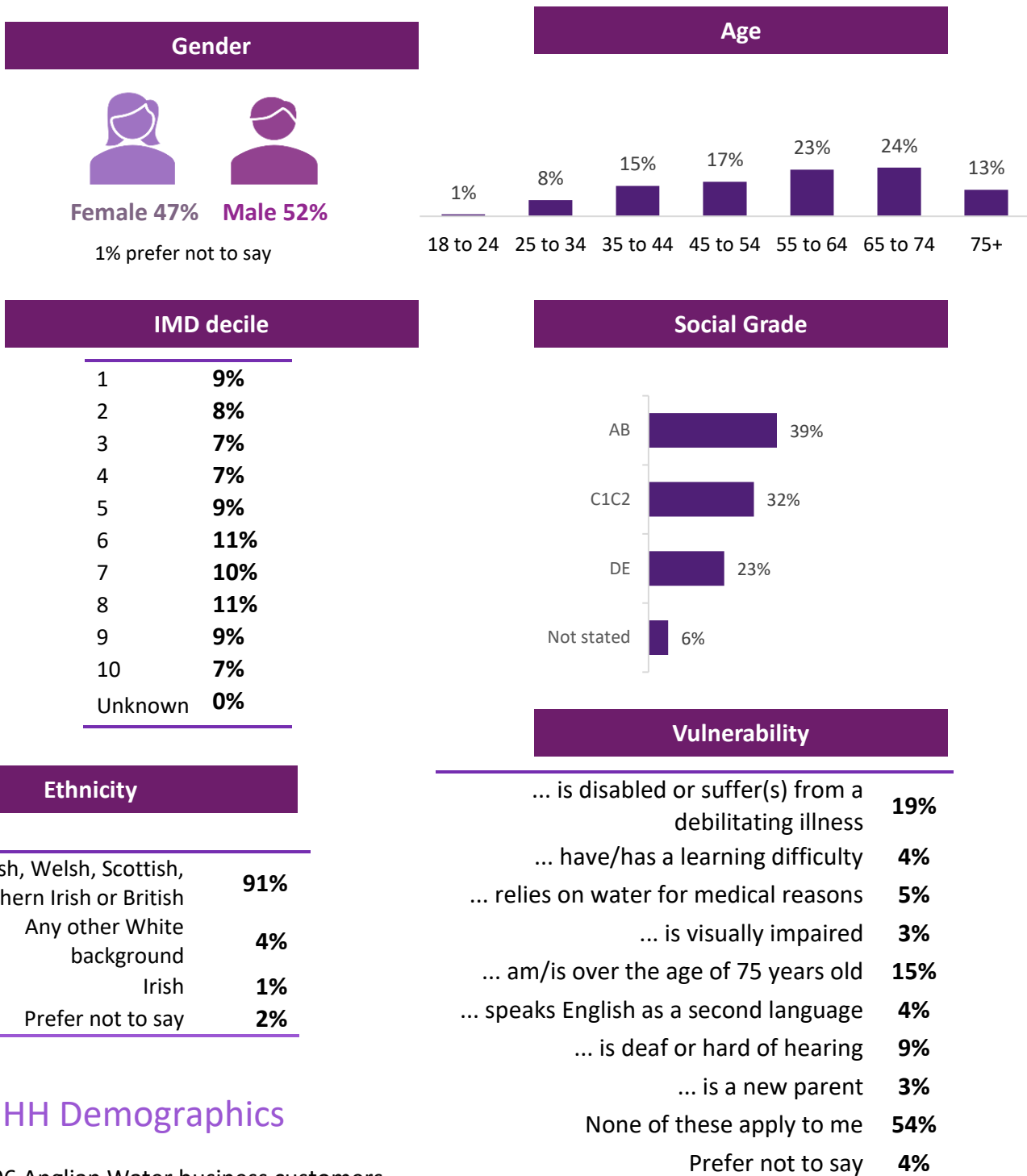
4 FINDINGS

4.1 Introduction

The following section of this report details the findings of the study.

4.2 HH Demographics

1,374 Anglian Water household customers took part in the Affordability and Acceptability Testing research (939 in the Anglian dual supply area, 204 in the ESW Anglian area and 231 in the Hartlepool area). 799 responded to our email invitation (620 in the Anglian dual supply area, 107 in the ESW Anglian area and 72 in the Hartlepool area) and 575 to our postal invitations (319 in the Anglian dual supply area, 97 in the ESW Anglian area and 159 in the Hartlepool area). This is how their profiles fell out (pre weighting). Percentages may not add up to 100 due to rounding.



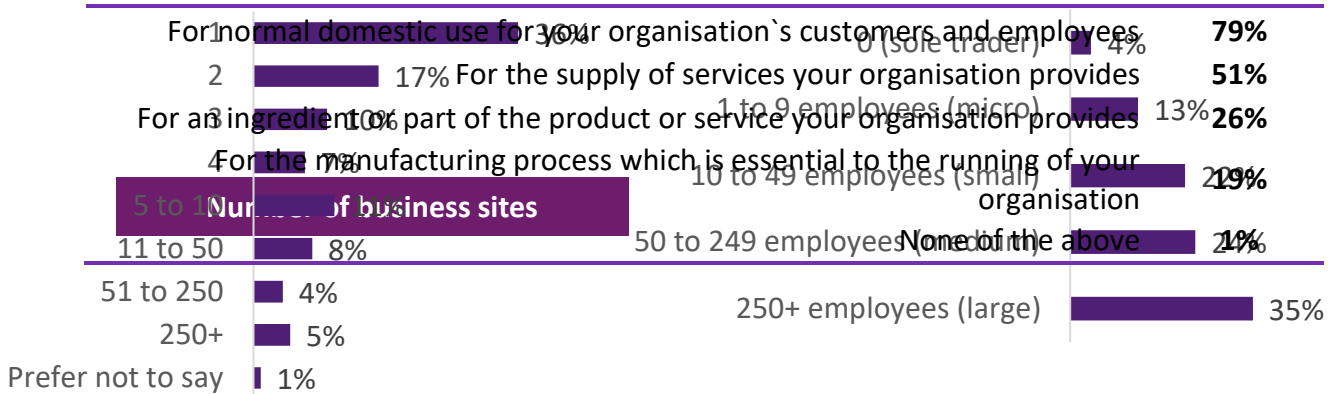
4.3 NHH Demographics

206 Anglian Water business customers took part in the Affordability and Acceptability Testing research (101 in the Anglian

dual supply area, 51 in the ESW Anglian area and 54 in the Hartlepool area). 203 interviews were achieved through specialist panel, 3 via CATI. This is how the profiles fell out. Percentages may not add up to 100 due to rounding.

Main use of water on premises

Number of employees



Industry

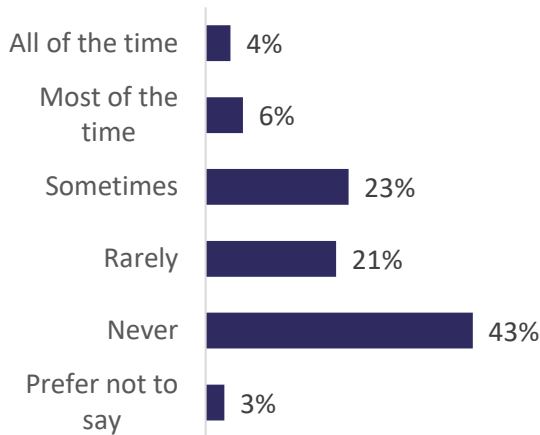
Human health and social work activities	14%	Arts, entertainment and recreation	3%
Manufacturing	13%	Real estate activities	2%
Education	10%	Public administration and defence	2%
Wholesale and retail trade	9%	Other service activities	2%
Construction	8%	Agriculture, forestry and fishing	1%
Hotels & catering	7%	Other service activities	2%
IT and Communication	7%	Other	3%
Transport and storage	6%	Prefer not to say	1%
Professional, scientific and technical activities	4%		
Finance and insurance activities	3%		

4.4 Household Financial Temperature Check

Over to 2 in 5 (43%) of those we spoke to say they never struggle to pay their bill, however a third do (33%), at least sometimes.

- Females in particular struggle to pay their bill at least sometimes, with 41% saying they did compared to 25% of males (a statistically significant difference). In contrast, 53% of males also say they never struggle to pay their bills compared to only 34% of females. This is too, is a significantly different.
- Similar was seen with Socio-economic group (SEG) DE, where 58% say they are struggling to pay at least sometimes (a significantly higher proportion than 18% of AB and 35% of C1C2 participants).

Figure 1. Q9 Thinking about your finances over the last year, how often, if at all, has your household struggled to pay at least one of its bills?

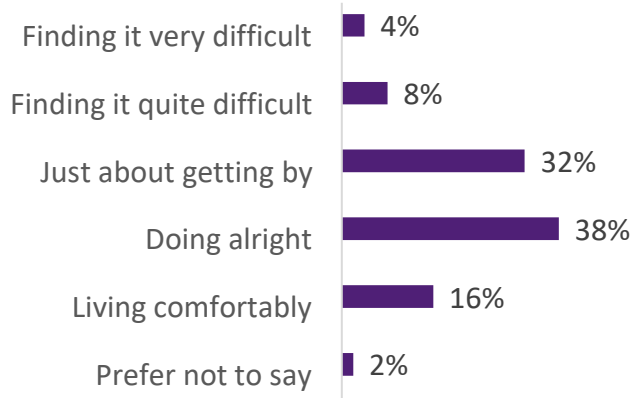


Base: All HH participants weighted base (1,099)

Given the current economic situation it is perhaps unsurprising that 44% of the households we spoke to are finding it difficult to manage financially or are just about getting by.

- Females again (53%) are significantly more likely to be struggling to manage financially than males (35%).
- 67% of SEG DE also struggle managing their finances – statistically significantly when compared to those in other social grades (AB=29%; C1C2=48%).

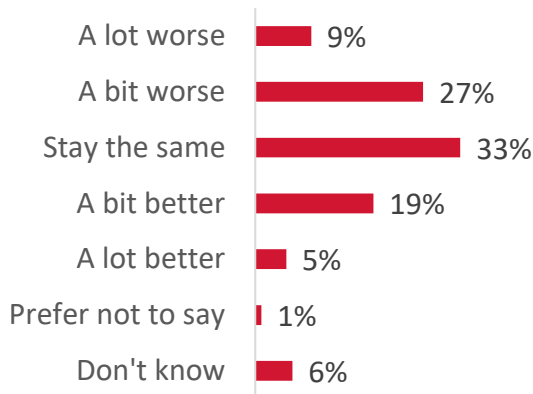
Figure 2. Q10 Overall, how well would you say you are managing financially now?



Base: All HH participants weighted base (1,099)

Over a third of households (36%) expect their financial situation to worsen in the next few years and a quarter (24%) expect it to improve.

Figure 3 Q11 Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get?

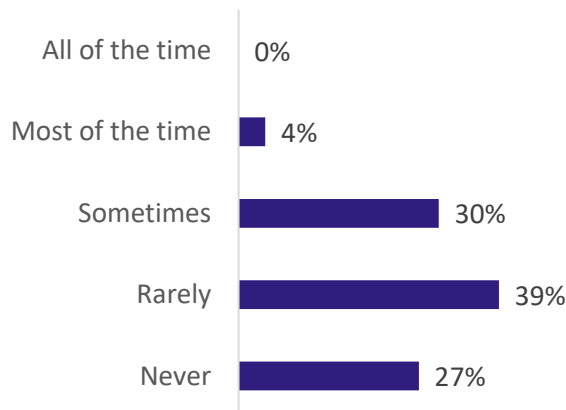


Base: All HH participants weighted base (1,099)

4.5 Non-household Financial Temperature Check

27% of businesses say they never struggle to pay their bills. However, a just over a third do have some difficulty paying their bills (34%).

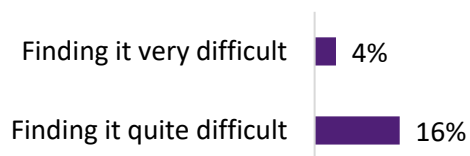
Figure 4. Q9 Thinking about your finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills?



Base: All NHH participants weighted base (481)

Over 2 in 5 businesses (44%) are operating with financial difficulty, with less than 1 in 5 (17%) operating comfortably.

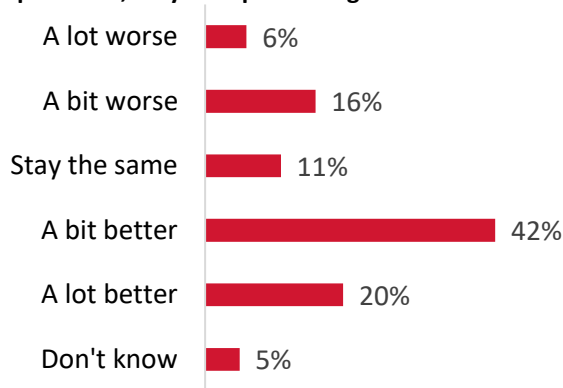
Figure 5. Q10 Overall, how well would you say your organisation is managing financially now?



Base: All NHH participants weighted base (481)

Over 3 in 5 businesses (62%) expect their financial situation to improve in the years to come, only 1 in 5 (22%) are expect it to worsen.

Figure 6. Q11 Thinking about your household/organisation`s financial situation over the next few years up to 2030, do you expect it to get:



Base: All NHH participants weighted base (481)

4.6 Affordability

The prevalence of participants stating that the proposed bill increases would be very or fairly easy to afford, was low, at 22% overall. Just 19% of households and 29% of non-households said the increases would be fairly or very easy to afford.

By contrast, 42% said that stated the bill increases would be fairly or very difficult to afford (42% of households, 43% of non-households). 33% stated that it would be neither easy nor difficult (36% and 26% respectively).

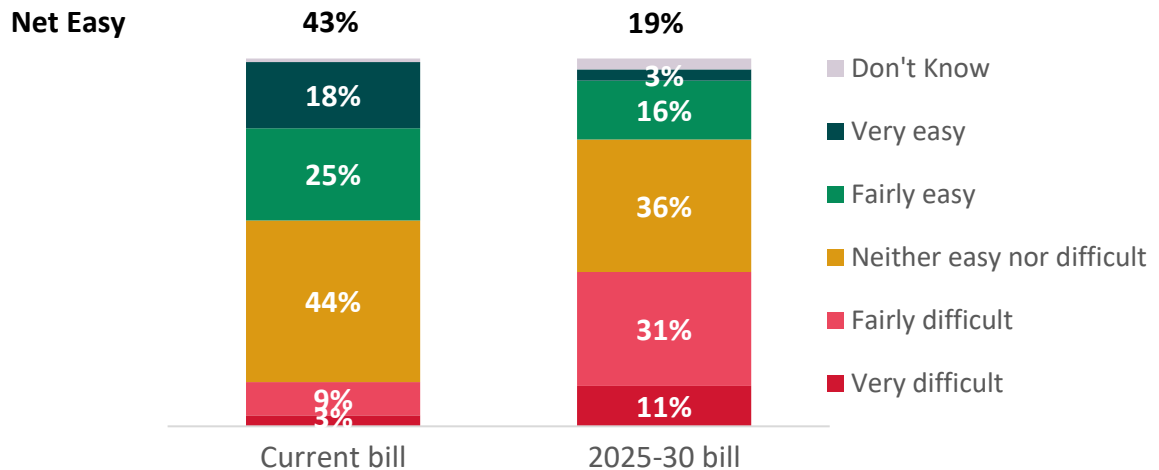
4.7 Household Affordability

Currently, 43% of households can afford their existing water and sewerage bills fairly or very easily.

Only 19% of household customers thought that the proposed bill would be fairly or very easy to afford.

- This figure is identical regardless of the method of invitation to the survey.
- Males are significantly more likely to find the future bill fairly or very easy compared to females (23% vs 15%)
- Females are significantly more likely to find the bill fairly or very difficult (48% vs 34%)

Figure 7. Q13 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?

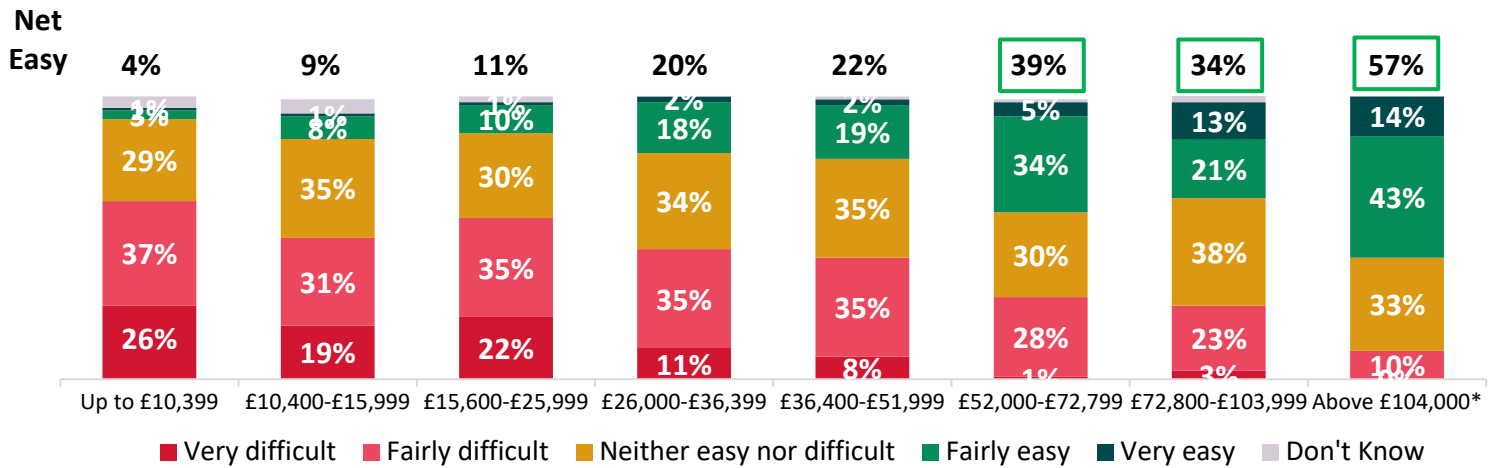


Base: All HH participants weighted base (1,099)

The increase in the water and sewerage bill is likely to become problematic for those that are already struggling financially (finding it very or quite difficult to manage financially). 57% say they are already finding it very or fairly difficult to pay their current water bill, this number increases to 78% when asked about the 2025-30 bill.

As expected, affordability of the future bill is more problematic for those on the lower end of the income scale, especially for those earning under £26,000 (over half of these participants would find this bill fairly or very difficult to afford).

Figure 8. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?

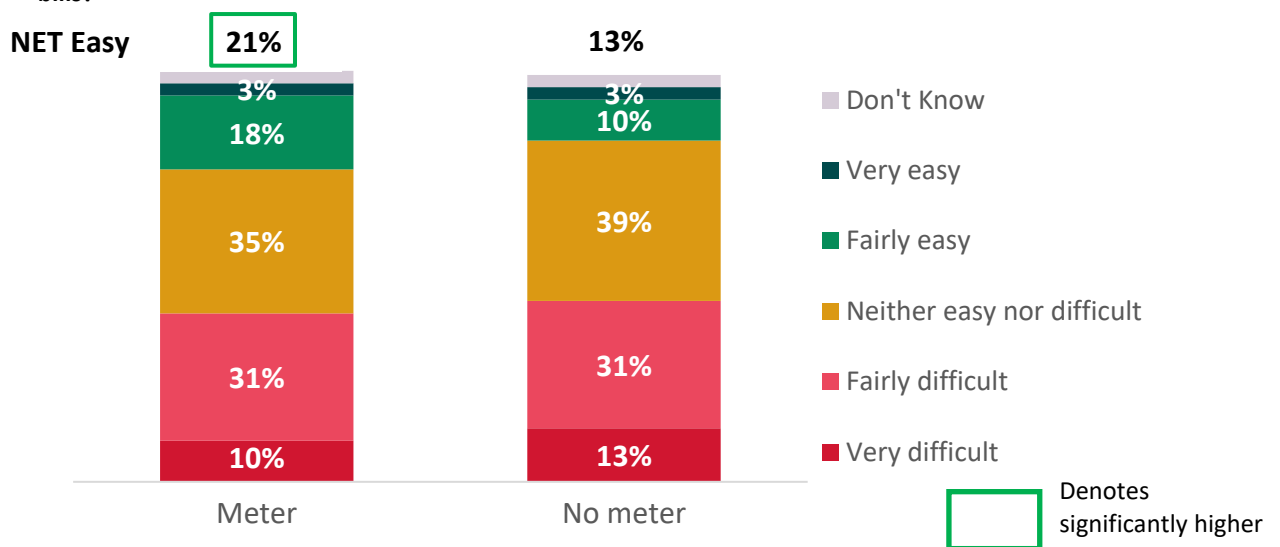


Base: All HH participants weighted base Up to £10,399 (74), £10,400-£15,999 (115), £15,400- 25,999 (154) £26,000-£36,600 (147), £36,400-£51,999 (159), 52,000 -£72,799 (128), £72,800-£103,999 (64) Above £104,000 (33)*Caution low base – results indicative only

 Denotes significantly higher

Perceived affordability of the future bill is higher among those customers that have a water meter compared to those that don't. 21% of those with a water meter say they would find it easy to pay the bill in the future compared to 13% of those that currently don't have a meter (a significant difference).

Figure 9. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?



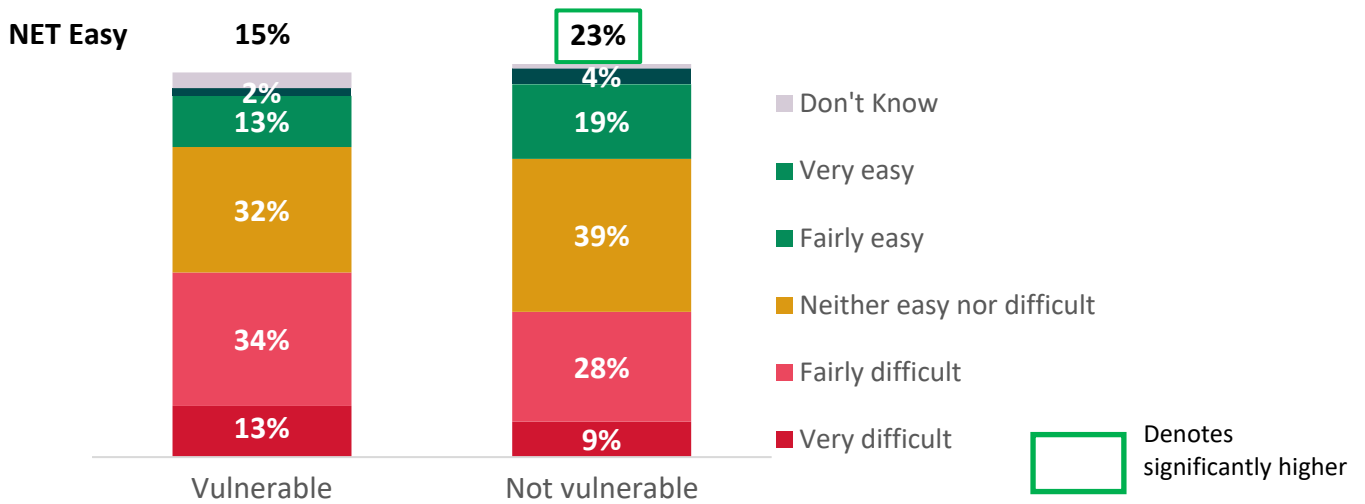
Base: All HH participants weighted base with meters (799) and with no meter (225)

Affordability (net very/fairly easy) is significantly lower among households that have members with any vulnerability (at 15%) compared to households without vulnerable members (23%).

These households are significantly more likely to find the proposed bill fairly or very difficult to pay (47%) compared to those without a vulnerable members (37%)

When looking at vulnerability by type* we see that those that are considered vulnerable for medical reasons are significantly more likely to say they will find these bills fairly or very difficult (56%) compared to those considered vulnerable because of communication (43%) or life stage (37%).

Figure 10. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?



Base: All HH weighted base with vulnerable members (458) and HH with no vulnerable members (596)

*Details of conditions listed under each vulnerability can be found in Appendix E

Those that would find it difficult to pay the bill in the future said most often that they would spend less on essentials (60%), use less water (51%), spend less on food shopping and essentials (42%) as well as use less fuel (42%) to meet the additional increase in the bills.

Figure 11. Q15 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?



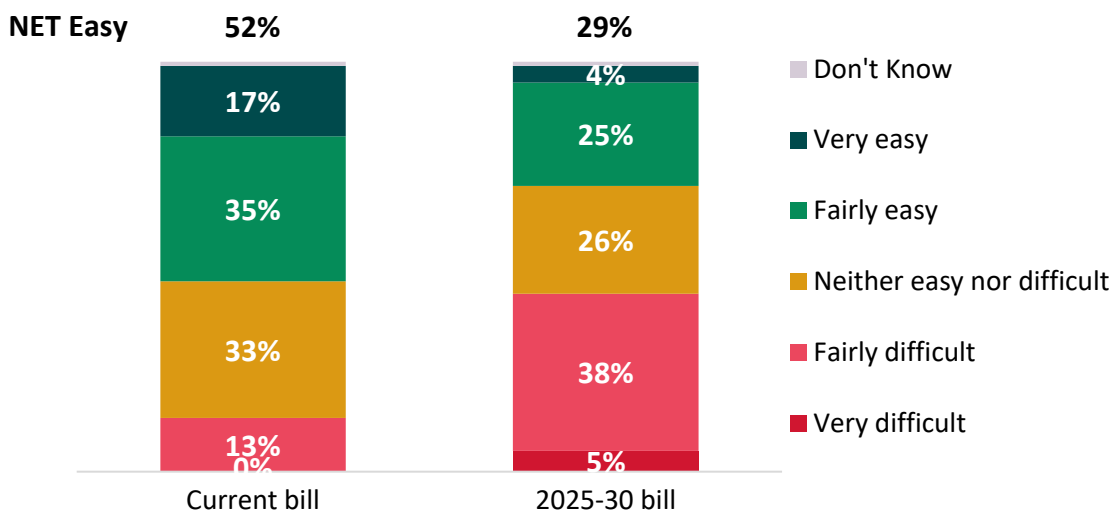
Base: All HH that would find it difficult to pay the future bill weighted base (850)

4.8 Non-household Affordability

Affordability is higher among the non-household population compared to the household population. Over half of businesses (52%) find their bills easy or very easy to afford. This however drops down to 29% when thinking about the future bill.

The affordability of the water and sewerage bill is likely to become problematic for businesses that are already struggling financially (those finding it very or quite difficult to manage financially). 38% say they are finding it very or fairly difficult to pay their current water bill; this number increases to 79% when asked about the 2025-30 bill.

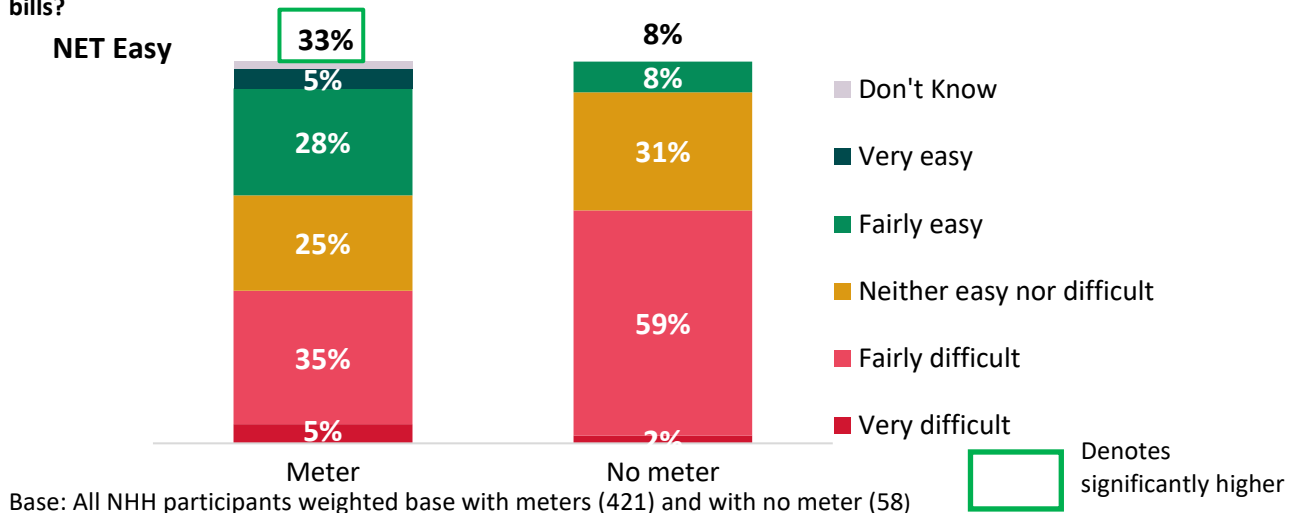
Figure 12. Q13 How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills?



Base: All NHH participants weighted base (481)

Just like with households, perceived affordability of the future bill is higher among non-household customers that have a water meter compared to those that don't. 33% of those with a water meter say they would find it easy to pay the bill in the future compared to 8% of those that currently don't have a meter; a significant difference.

Figure 13. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?



Base: All NHH participants weighted base with meters (421) and with no meter (58)

4.9 Acceptability

Acceptability of the proposed business plan was high at 73% overall. 69% of households and a significantly higher proportion of non-households, 84%, found the plan was acceptable or completely acceptable.

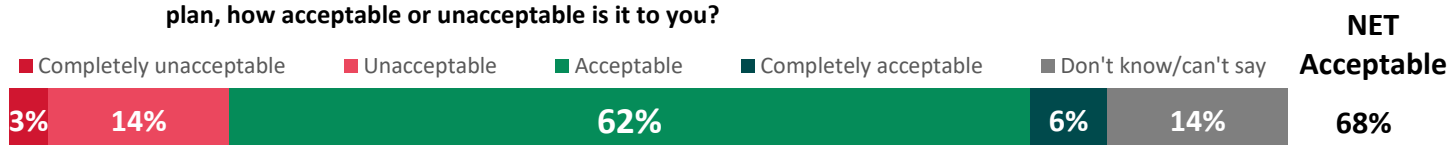
- 75% of customers in the dual supply area found the plan acceptable, 67% in the ESW Anglian area and 75% in the Hartlepool area

4.10 Household Acceptability

Over two thirds (68%) of Anglian Water customers we spoke to, found the proposed plan acceptable. Acceptability of the plan among those that are struggling financially is also fairly high, at 60%.

A higher percentage of females (72%) than males (66%) found the plan acceptable, but the difference was not found to be significant. However, a significantly higher proportion of males (22%) found the plan unacceptable compared to females (11%).

Figure 14. Q32 Based on everything you have seen and read about Anglian Water’ proposed business plan, how acceptable or unacceptable is it to you?

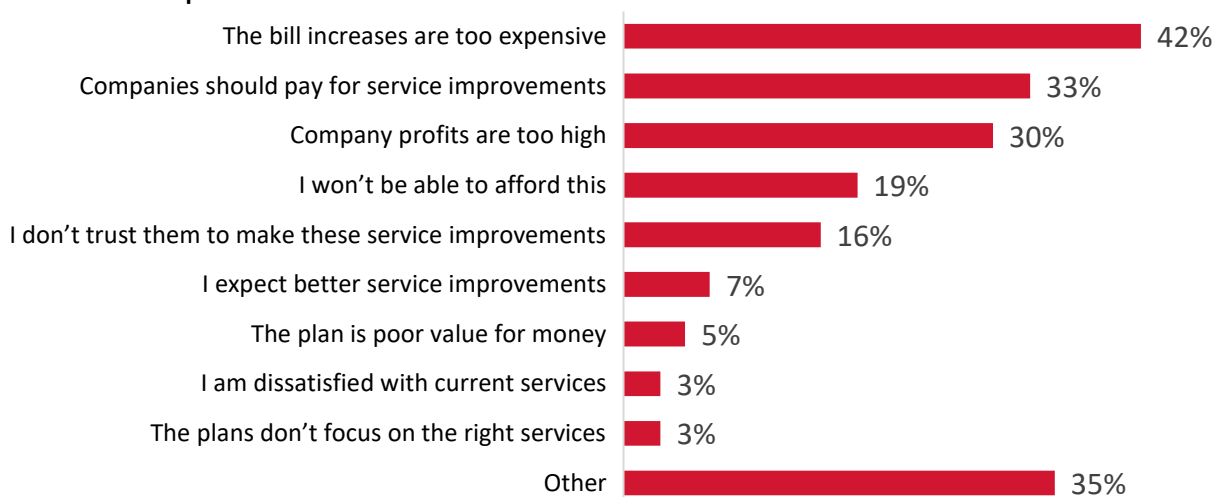


Base: All HH participants weighted base (1,099)

Reasons for unacceptability

17% of household participants found the proposed plan unacceptable. The top 3 reasons are all financially driven. The bill increase being too expensive was top (42%) followed by the belief that companies should pay for the improvements (33%) and that company profits are too high (30%).

Figure 15. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable?

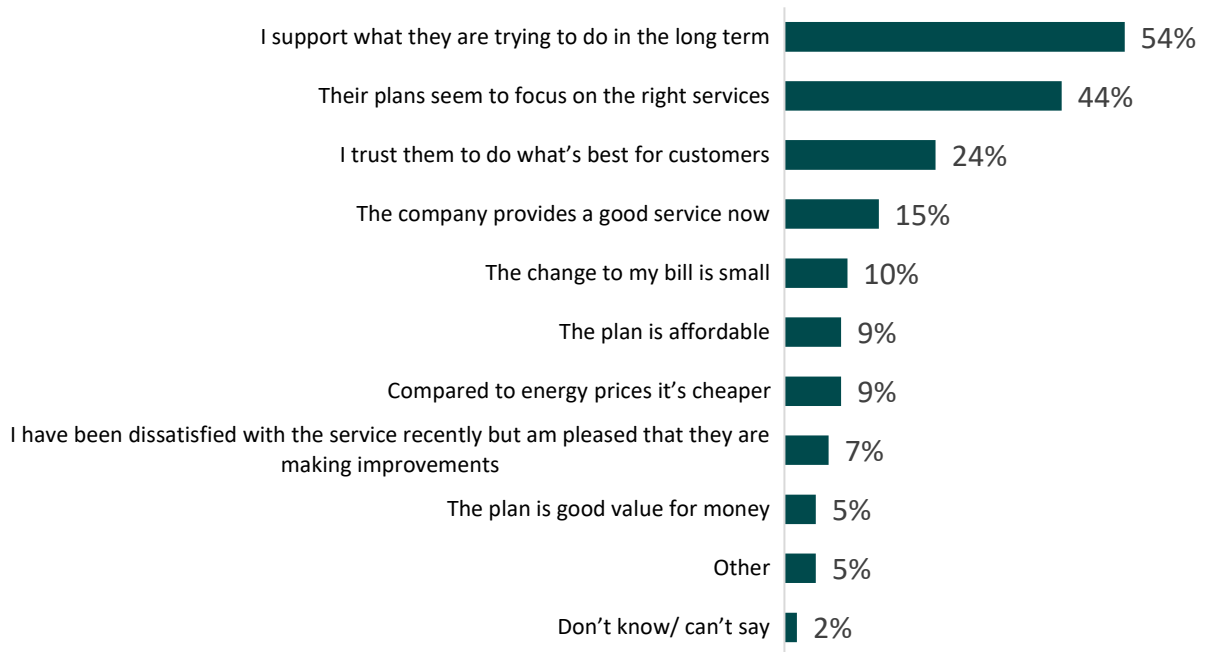


Base: All HH participants weighted base that felt proposals were unacceptable (185)

Reasons for acceptability

68% of household customers found the plan acceptable. The top 3 reasons for finding the plan acceptable were: Customers supporting what Anglian Water are trying to do long term (54%), that Anglian Water’s plans focus on the right services (44%) and trust that Anglian Water are doing what is best for their customers (24%).

Figure 16. Q34 What are the two main reasons that you feel the proposals for your water supply are acceptable?



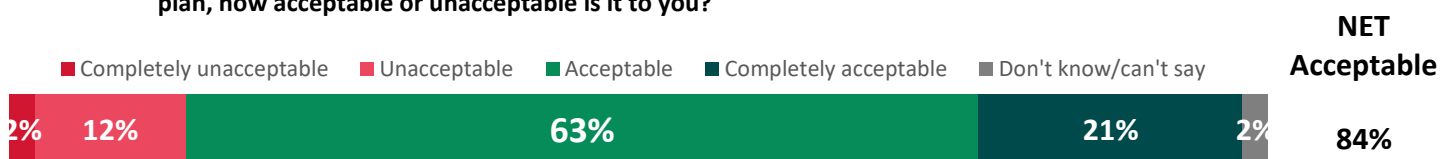
Base: All HH participants that felt proposals were acceptable (755)

4.11 Non-household Acceptability

Acceptability is higher among the non-household population than the household. 84% of the businesses we spoke to, found the proposed business plan to be acceptable.

Acceptability was high (83%) even amongst businesses that are currently struggling to pay their bills.

Figure 17. Q32 Based on everything you have seen and read about Anglian Water’ proposed business plan, how acceptable or unacceptable is it to you?



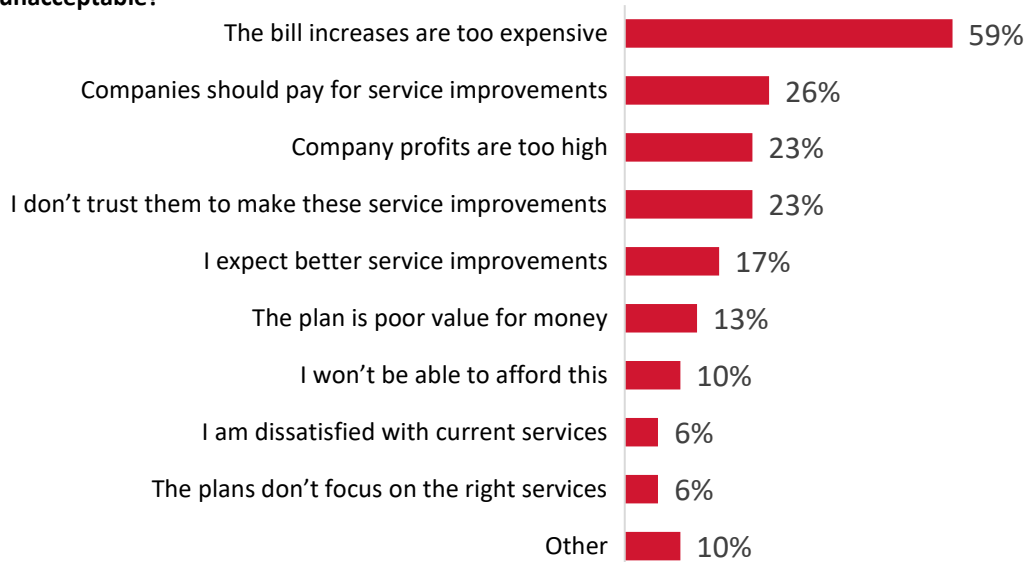
Base: All NHH participants weighted base (481)

Reasons for unacceptability

Only 14% of non-household participants found the proposed plan unacceptable. Just like for the household participants their responses were financially driven.

59% found the bill increase too expensive, 26% felt that companies should pay for them and 23% felt that company profits were too high.

Figure 18. Q33 What are the two main reasons that you feel the proposals for your water services are unacceptable?

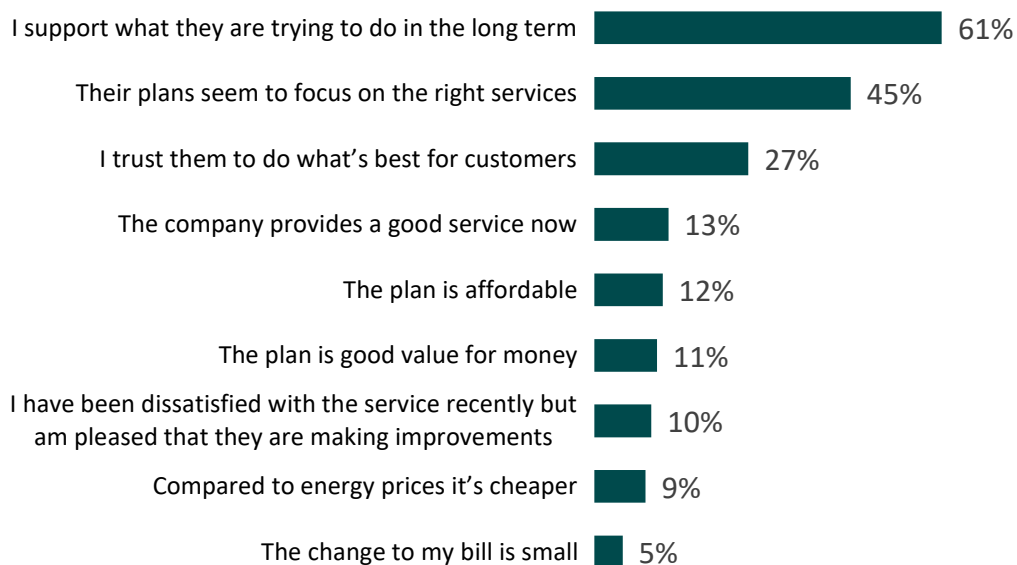


Base: All NHH participants weighted base that felt proposals were unacceptable (65)

Reasons for acceptability

84% of businesses found the plan acceptable because they support what Anglian Water are trying to do long term (61%), feel the plan focuses on the right services (45%) and trust Anglian Water to do what is best for their customers (27%).

Figure 19. Q34 What are the two main reasons that you feel the proposals for your water supply are acceptable?



Base: All NHH participants weighted base that felt proposals were acceptable (405)

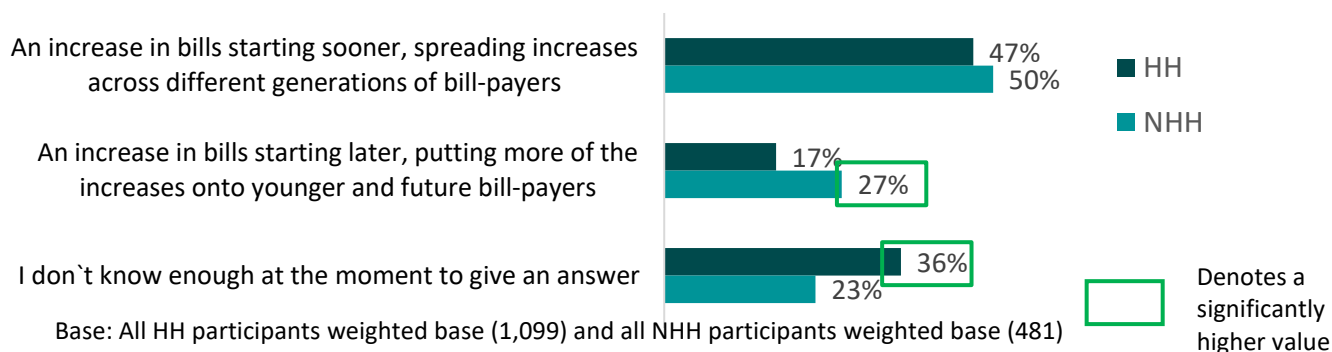
4.12 Intergenerational Phasing

Households seem more reluctant than non-household customers for the price increases to be put onto future customers.

Just over a third (36%) of households were unable or unwilling to answer the question (potentially indicating the difficulty of the choice in the current financial circumstances) compared with only 23% of businesses, a significant difference.

Both business and household customers that were able to make a choice preferred the phasing option with an immediate increase in bills rather than a delay.

Figure 20. Q35 Long term investment by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?

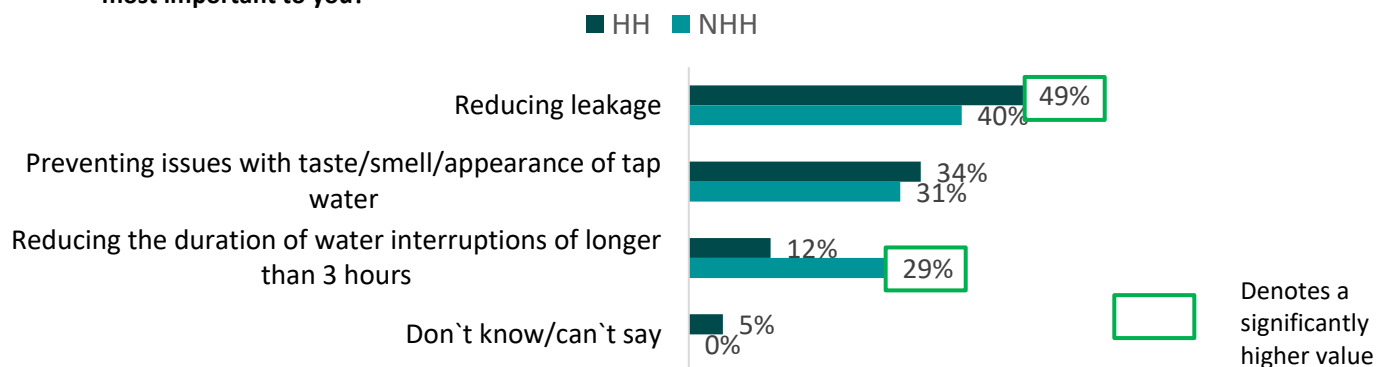


4.13 Performance commitments – water related

Reducing leaks was chosen as the most important performance commitment by household customers and non-household customers alike, although a significantly higher proportion of household customers chose this as their top priority.

■ This was significantly higher among males (56%) compared to females (44%)

Figure 21. Q19 Based on what you have just read, which of these three parts of the business plan is the most important to you?



Preventing issues with the quality of water was rated second by both households and non-households.

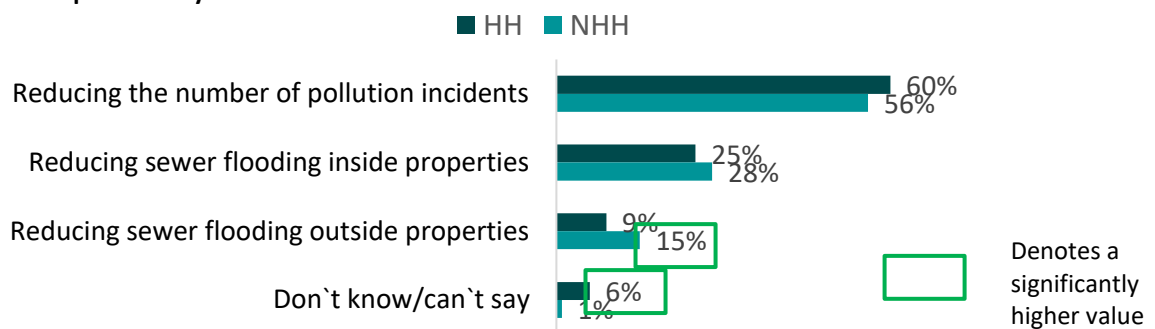
Reducing the duration of interruptions was rated significantly more important for non-household customers (29%) than for household customers (12%).

4.14 Performance commitments – pollution and sewage related

Reducing the number of pollution incidents was rated most important improvement for both household and non-household customers.

- This was significantly higher for (61%) for customers in the Anglian dual supply area than those in the ESW Anglian area (53%).
- Additionally, this was significantly higher among males (66%) compared to females (55%).

Figure 22. Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you?



Base: Dual + ESW HH participants weighted base (1,082) and Dual + ESW NHH participants weighted base (469)

Reducing the number of incidents of sewage flooding inside the properties was the second most important enhancement for both groups of participants.

- Significantly more important to females (29%) than males (21%).

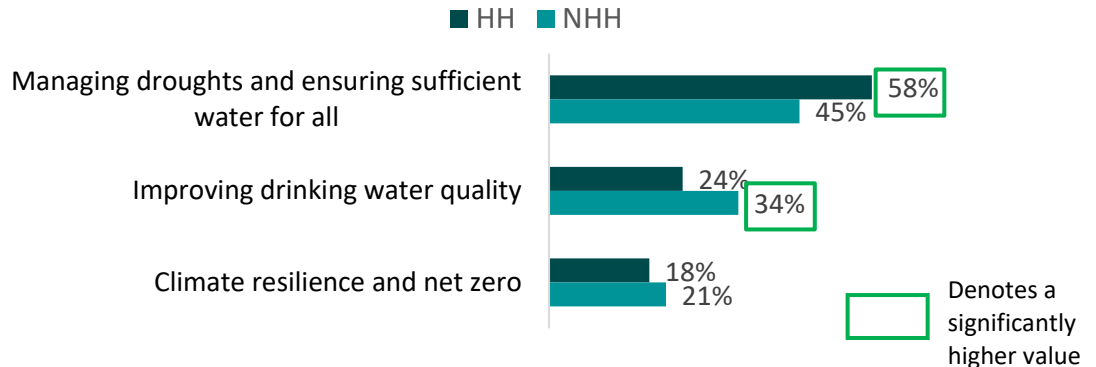
Reducing the number of incidents of sewage polluting outside of properties was the third rated improvement with businesses rating these significantly higher than households.

4.15 Enhancement cases – Bank 1

With the effect of climate change becoming more apparent in recent years perhaps it is unsurprising that managing droughts and ensuring sufficient water for all was rated the most important enhancement. This was rated significantly more frequently among household customers than businesses.

- This was significantly higher among males (66%) compared to females (52%)

Figure 23. Q24. Based on what you have just read, which of these four parts of the business plan is the most important to you?



Base: Dual + H'pool HH participants weighted base (830) and Dual + H'pool NHH participants weighted base (419)

Improving drinking water quality was rated second (with a significantly higher proportion of businesses customers choosing this as their second compared to household customers).

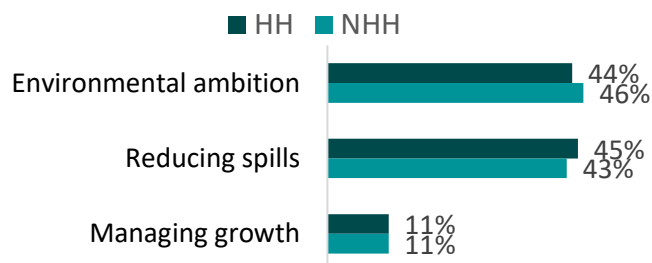
Climate change resilience was chosen as most important option least, however this was still chosen by around 1 in 5 businesses and households.

4.16 Enhancement cases – Bank 2

Environmental ambition and reducing spills were close to being joint first priority from this bank, with 45% of all participants choosing environmental ambition as their first priority and 44% chose reducing spills as theirs.

11% of household and non-household customer chose Managing growth as their third improvement.

Figure 24. Q25. Based on what you have just read, which of these four parts of the business plan is the most important to you?



Base: Dual + ESW HH participants weighted base (1,082) and Dual + ESW NHH participants weighted base (469)

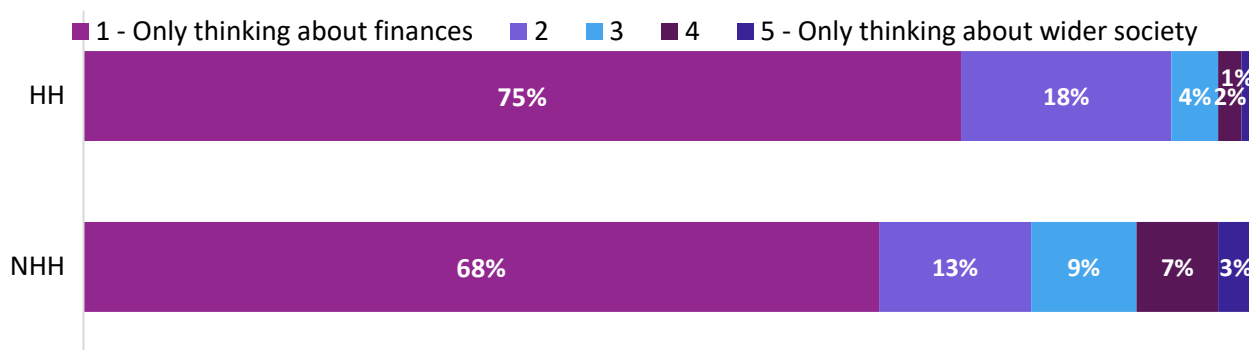
4.17 Additional question

Alongside the mandated questions Anglian Water asked an additional question to dive deeper into the reason behind the participants' answer.

After asking participants about their ability to afford the future bill they were asked what was the driver for their answer.

By asking this question we found that 75% of household participants and 68% of non-household participants answered the question based solely on their household's or business' financial situation.

Figure 25. Q15c. Thinking about the previous question, how much did you base your responses on the impacts of the proposed bills on your personal household/company/organisation finances and wider society?



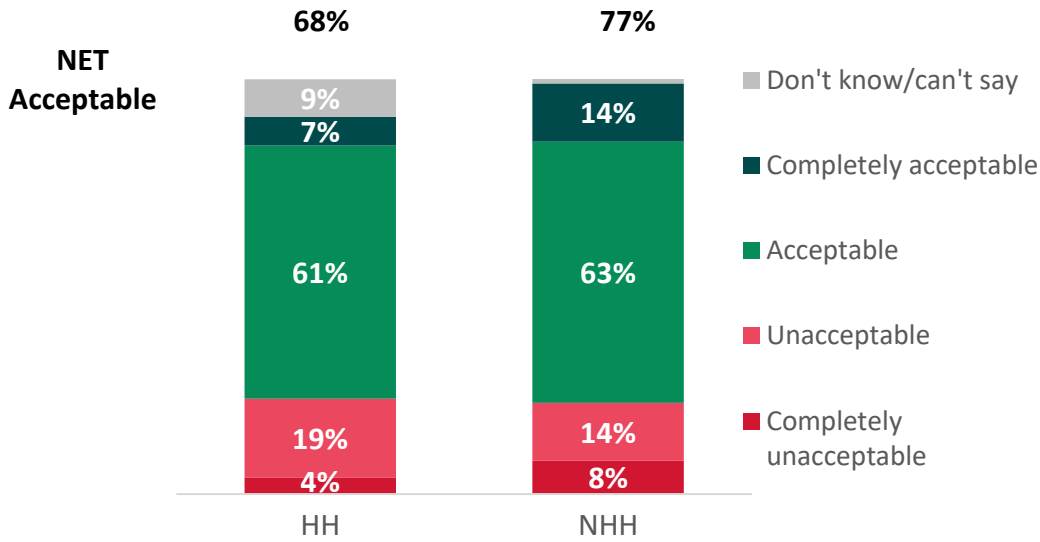
All HH participants weighted base (1,077) and all NHH participants weighted base (481)

4.18 Additional Surveys

Anglian Water also conducted a preliminary "lite" survey based on the AAT quantitative questionnaire. Feedback was that participants were struggled to engage with the question on affordability of the planned bill increase as almost the very first material question in the survey.

The decision was made to run a complementary "shadow" survey, mirroring the Acceptability and Affordability survey in terms of methodology, sampling, quotas and weighting. In this survey, participants were shown the plan components, then asked a single acceptability question that included the bill increase. It was found that 68% of households and 76% of non-household customers found the proposed plan (including associated bill increase) acceptable.

Figure 26. Q13c. Every year, water companies review their water and sewerage charges to make sure customers are getting the best value for money. From 1 April 2023 Anglian Water customers, on average, pay £1.35 per day or £493 per year for all water and sewerage services. The total average household bill in the period from 2025-2030 will be or £558 per year (£1.53 per day) water and sewerage services. Based on this high level plan, how acceptable or unacceptable do you find Anglian Water's focus for 2025-2030?



Base: All HH participants weighted base (1,051) and all NHH participants weighted base (460)

Anglian Water will separately release a full report and set of results from the Shadow Survey.

APPENDIX A

Adherence to Ofwat's standards for high quality customer research

Requirement	How the study has adhered
<ul style="list-style-type: none"> ■ Useful and contextualised 	<p>Research objectives aligned to PR24 and undertaken in accordance with Ofwat & CCW's published guidance.</p>
<ul style="list-style-type: none"> ■ Neutrally designed 	<p>Outside of the prescribed Ofwat guidance, every effort has been made to ensure that the research is neutral and free from bias. All elements of design were checked and challenged by Anglian Water's ICG. Where there is the potential for bias, this has been acknowledged in the report.</p>
<ul style="list-style-type: none"> ■ Fit for purpose 	<p>Research undertaken in accordance with Ofwat & CCW's published guidance. Cognitive testing was carried out to ensure the complex subject matter was presented in the questionnaire in a way which was as understandable and engaging as possible for respondents. Visual stimulus was created in order to aid participant understanding of the proposed plan.</p>
<ul style="list-style-type: none"> ■ Inclusive 	<p>Household and business customers were represented. Lower IMD deciles were over-sampled and higher IMD deciles under-sampled, to compensate for lower response rates. The response rates were monitored across a range of demographics to ensure representation, although the prescribed methodology prevents any interventions in this regard. Accommodation was made for any accessibility requests (including paper/postal versions, large print, high contrast print), via a freephone number.</p>
<ul style="list-style-type: none"> ■ Continual 	<p>This research builds on the foundation of the qualitative work and contributes towards the ongoing development of policy and plans.</p>
<ul style="list-style-type: none"> ■ Independently assured 	<p>All research was conducted by Accent, an independent market research agency. Anglian Water collaborated with their Independent Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings.</p>
<ul style="list-style-type: none"> ■ Shared in full with others 	<p>The research will be published and shared on the Anglian Water website.</p>
<ul style="list-style-type: none"> ■ Ethical 	<p>Research conducted in accordance with the Market Research Society code of conduct and conforming to the requirements of ISO 20252:2019. Accent and Anglian Water were subject to strict data protection protocols.</p>

APPENDIX B

Additional Information

The following information on **Quantitative** work is available upon request:

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews, synchronous or asynchronous),
- The target group and sample selection methods,
- Assessment of sample representation of target population and respective implications,
- The sampling method, including size of planned and achieved sample, reasons for differences in planned and achieved and how any problems in this respect were dealt with,
- Response rate where probability samples were used and its definition and calculation method,
- Participation rate where non-probability samples were used,
- The number of interviewers or moderators, if applicable,
- The fieldworker/moderator validation methods, if applicable,
- The questionnaires, any visual exhibits or show cards, and other relevant data collection documents,
- The weighting procedures, if applicable,
- Any methods statistical analysis used,
- The estimating and imputation procedures, if applicable,
- The results that are based on subgroups and the number of cases used in subgroup analysis,
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used).

APPENDIX C

Limitations

Limitation	Impact
Recruiting NHH participants via CATI proved challenging	Recruitment of participants through CATI was very difficult therefore all but three interviews with non-household participants were achieved through a specialised business panel
Small NHH participants are unlikely to be in scope (either by not having a dedicated business water supply, or by being in serviced offices with inclusive water)	The NHH sample is skewed towards larger organisations.
Some undesirably high weighting values were evident	The HH sample was (as a result of the prescribed methodology) heavily skewed towards older participants therefore analysis at an age subgroup level was included in the tables, but not in the report. Similarly, micro NHH were not represented particularly well in the sample (due to the prevalence of small businesses that do not have a dedicated NHH water supply, which made them ineligible for participation) and were weighted up more than might otherwise have been desirable. Impact to the overall affordability & acceptability figures was minimal.

APPENDIX D

Fieldwork Materials

Invitation letter – E&SW



<Customer name>
<Address>

3 Orchard Place
London
SW1H 0BF

Unique ID number: <XXXX>
PIN: <nnnn>

Dear Sir/Madam

Water services research: complete a 15 minute survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Anglian Water, the organisation which supplies water and sewerage services to customers in the East of England and Hartlepool.

We are collecting feedback on behalf of Anglian Water from their customers to shape their plans for 2025 and beyond, which will affect your services and future bills. As the driest region in the UK, they face challenges caused by a changing climate and a growing population. Anglian Water have to make big decisions to make sure they can continue to supply safe, clean drinking water as well as look after the environment. But they need your help. They want your thoughts and views so they can build their plans around what's important to you.

Anyone who is eligible to take part and completes the full 15-minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take about 15-minutes to complete. You can check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3601eswsurvey> and entering your Unique ID <XXXX> and PIN <nnn>.



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6580. You will be asked to leave your name and the 4 digit unique ID number <XXXX> and PIN <nnnn>. We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **Wednesday 6th September 2023**. Anglian Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at AnglianWaterResearch@accent-mr.com

Yours faithfully



on behalf of the study team

Invitation letter – DUAL supply area



<Customer name>
<Address>

3 Orchard Place
London
SW1H 0BF

Unique ID number: <XXXX>
PIN: <nnnn>

Dear Sir/Madam

Water services research: complete a 15 minute survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Anglian Water, the organisation which supplies water and sewerage services to customers in the East of England and Hartlepool.

We are collecting feedback on behalf of Anglian Water from their customers to shape their plans for 2025 and beyond, which will affect your services and future bills. As the driest region in the UK, they face challenges caused by a changing climate and a growing population. Anglian Water have to make big decisions to make sure they can continue to supply safe, clean drinking water as well as look after the environment. But they need your help. They want your thoughts and views so they can build their plans around what's important to you.

Anyone who is eligible to take part and completes the full 15-minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take about 15-minutes to complete. You can check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3601dualsurvey> and entering your Unique ID <XXXX> and PIN <nnn>.

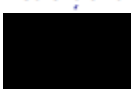


Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6580. You will be asked to leave your name and the 4 digit unique ID number <XXXX> and PIN <nnnn>. We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **Wednesday 6th September 2023**. Anglian Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at AnglianWaterResearch@accent-mr.com

Yours faithfully



on behalf of the study team

Invitation letter – Hartlepool



<Customer name>
<Address>

3 Orchard Place
London
SW1H 0BF

Unique ID number: <XXXX>
PIN: <NNNN>

Dear Sir/Madam

Water services research: complete a 15 minute survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Anglian Water, the organisation which supplies water and sewerage services to customers in the East of England and Hartlepool.

We are collecting feedback on behalf of Anglian Water from their customers to shape their plans for 2025 and beyond, which will affect your services and future bills. As the driest region in the UK, they face challenges caused by a changing climate and a growing population. Anglian Water have to make big decisions to make sure they can continue to supply safe, clean drinking water as well as look after the environment. But they need your help. They want your thoughts and views so they can build their plans around what's important to you.

Anyone who is eligible to take part and completes the full 15-minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take about 15-minutes to complete. You can check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvv.com/3601hpoolsurvey> and entering your Unique ID <XXXX> and PIN <NNNN>.



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6580. You will be asked to leave your name and the 4 digit unique ID number <XXXX> and PIN <NNNN>. We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **Wednesday 6th September 2023**. Anglian Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at AnglianWaterResearch@accent-mr.com.

Yours faithfully



on behalf of the study team

Email invite

Email invite

Hello,

SUBJECT: Help shape the future of your region and get a £10 voucher

We are collecting feedback on behalf of Anglian Water from their customers to shape their plans for 2025 and beyond, which will affect your services and future bills.

As the driest region in the UK, they face challenges caused by a changing climate and a growing population. They have to make big decisions to make sure they can continue to supply safe, clean drinking water as well as look after the environment.

But they need your help. They want your thoughts and views so they can build their plans around what's important to you.

How to get involved

The survey will only take around 15 minutes of your time. To say thank you for taking part, anyone eligible who completes the survey will get a £10 voucher (for Amazon, M&S or an One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

The survey closes on the 4th of September 2023. To get started, simply go to: <URL>.

Any questions?

If you have any questions about this research you can get in touch with our research team by emailing AnglianWaterResearch@accent-mr.com

Regards, TBD

██████████ and the Anglian Water team

Reminder letter

Hello,

Anglian Water research: Still time to complete a 15 minute survey and receive a £10 voucher - REMINDER

We are collecting feedback on behalf of Anglian Water from their customers to shape their plans for 2025 and beyond, which will affect your services and future bills.

As the driest region in the UK, they face challenges caused by a changing climate and a growing population. They have to make big decisions to make sure they can continue to supply safe, clean drinking water as well as look after the environment.

But they need your help. They want your thoughts and views so they can build their plans around what's important to you.

How to get involved

The survey will only take around 15 minutes of your time. To say thank you for taking part, anyone eligible who completes the survey will get a £10 voucher (for Amazon, M&S or an One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

The survey closes on the 4th of September 2023. To get started, simply go to: [URL](mailto:AnglianWaterResearch@accent-mr.com).

(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)

If you have any questions about this research, please don't hesitate to contact the research team by emailing AnglianWaterResearch@accent-mr.com or calling FREEPHONE 0800 099 6580.

Best wishes,

██████████ on behalf of the study team

About this survey

We have detailed below the answers to some frequently asked questions you might have about the survey.

Q. What information will be shown in the survey?

A. You will be shown information about Anglian Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what Anglian Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on Anglian Water's plans.

Q. Will my responses in the survey be attached to me?

A. No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf, and is completely confidential.

Q. Why might I not be eligible to part in the survey?

A. Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

Q. Why have I received this email?

A. Anglian Water is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies.

Paper version cover



<Customer name>
<Address>

3 Orchard Place
London
SW1H 0BF

Unique ID number: <XXXX>
PIN: <nnnn>

Dear Sir/Madam

Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for Anglian Water. Please find it attached. This pack should contain:

- (1) This letter
- (2) A paper version of the survey
- (3) A reply envelope (pre-paid - no stamp required)

Anyone who is eligible to take part and completes the full 20-minute survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid.

How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acs.vv.com/3601dualsurvey> and entering your Unique ID <XXXX> and PIN <nnn>.



Please note: the final date for us to receive paper submissions is 20th September 2023.

If you have any questions, please don't hesitate to contact the research team at AnglianWaterResearch@accent-mr.com.

Yours faithfully



on behalf of the study team

APPENDIX E

Questionnaire (Online version)

DUAL Supply area



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Anglian Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

The survey will only take around 20 minutes of your time. To say thank you for taking part, anyone eligible who completes the survey will get a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Or you can ask to donate the money to WaterAid instead. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions unless asked to do so.

Do you agree to proceed with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Prefer not to say **THANK AND CLOSE**

CODE AS Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

IF HH: Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Anglian Water is your water supplier and is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your site's water and sewerage service at any of its premises?

Yes

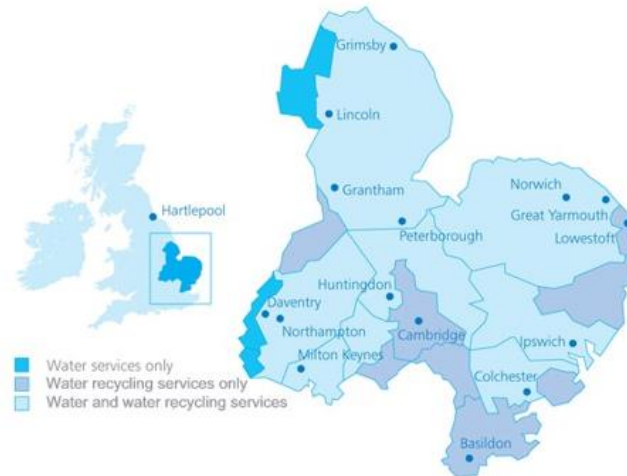
No **THANK AND CLOSE**

IF NHH: How many sites does your organisation have in any of the area below served by Anglian Water? Please use the map below to show the areas served by Anglian Water, including Hartlepool.

DP – USE SLIDE 1

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Anglian Water Supply Area



0 **THANK AND CLOSE**

1

2 or more

Don't know **THANK AND CLOSE**

IF NHH: When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Anglian Water area. Is that OK?

Yes

No **THANK AND CLOSE**

Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 20 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Affordability

We like to start by understanding a little bit about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time

Most of the time

Sometimes

Rarely

Never
Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

[IF HH] Living/**[IF NHH]** Operating comfortably
Doing alright
Just about getting by
Finding it quite difficult
Finding it very difficult
Prefer not to say

Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
A lot worse
A bit worse
Stay the same
A bit better
A lot better
Prefer not to say
Don't know

IF NHH: How much are you currently paying Anglian Water for your water and sewerage services bill, **each year?**

[Open-ended answer] **DP PLEASE ADD TEXT BOX**
Don't know

[all] How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

IF NHH: At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Anglian Water have.

Please could you go to [HTTPS://acsvy.com/3601](https://acsvy.com/3601)

You should see a thank you note, then on the next page somewhere to put your annual water and sewerage bill amount into. Please enter the bill for all sites your company operates in the Anglian Water area. An estimate is absolutely fine.

Interviewer note: do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

Proposed changes to your water/sewerage bill for the years 2025-2030.

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- *If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.*
- *If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.*
- *If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.*

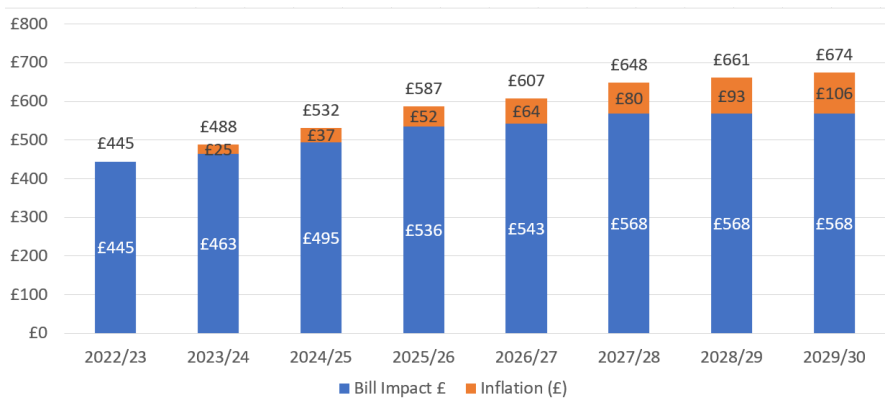
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services Anglian Water think they needed over the next few years.

The following chart shows the expected increase in your **water and sewerage** bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So, your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



IF SOCIAL TARIFF CUSTOMER (FROM SAMPLE TARIFF IS NOT EQUAL TO “STANDARD”): This bill profile is based on the financial support scheme you are currently on.

IF QNEWBILL = D/K: This bill profile is based on the average household bill

IF 0='DON'T KNOW': This bill profile is based on an example bill of £1,000.

[ASK ALL]

[IF HH] How easy or difficult do you think it would be for you to afford these water/sewerage bills? **[IF NHH & 0 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills? **[IF NHH & 0 = D/K]** How easy or difficult do you think it would be for your organisation to afford its water/water and sewerage/sewerage bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO 0**
- Fairly difficult **HH ONLY GO TO 0**
- Very difficult **HH ONLY GO TO 0**
- Don't know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Change employment to earn more
- Take a second (or more) job to increase household income
- Other, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Don't know

DP PLEASE ADD A TIMESTAMP

Thinking about [IF HH] the two previous questions [IF NHH] the previous question, how much did you base your responses on the impacts of the proposed bills on your [IF HH] personal household [IF NHH] company/organisation finances and wider society?

Please place the cursor on the point of the scale that reflects your view

DP PLEASE INSERT A 5-POINT SLIDING SCALE FROM 'Only thinking about my [IF HH] household finances [IF NHH] your company/organisation finances' TO 'Only thinking about wider society'

Anglian Water's Plans

We are now going to ask you some questions about your views on Anglian Water's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

Water company performance is monitored across a number of areas to ensure they deliver against their business plan objectives. We are now going to show you Anglian Water's plans in six areas, starting with three that relate to the provision of clean water services, followed by three that related to sewerage services:

- Appearance, taste and smell of tap water
- Leakage
- Unplanned water supply interruptions
- Sewage flooding of properties
- Sewage flooding of gardens or outbuildings
- Pollution incidents

Unplanned Water Supply Interruptions.

The following chart shows how Anglian Water are performing in the area of "Unplanned Water Supply Interruptions", against both their target and also the other water companies.

DP – USE SLIDES 6 AND 7

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Unplanned interruptions



If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Duration without water for more than 3 hours by minutes per property

Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 9th out of 17 companies on this measure

Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfodwy	00:37:28
South East	01:12:33

Better performance

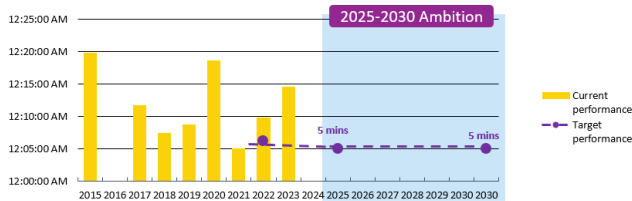
Worse performance

The following chart shows Anglian Water's proposed targets for reducing the length of time properties are without water on an average year:

Unplanned interruptions



Targets for reducing the length of time properties are without water.



Duration without water for more than 3 hours by minutes per property. (A lower number is better)

How:

Use smart networks with sensors and automation to improve data analysis and decision making to proactively deal with problems or resolve them faster.

Performance:

Interruptions have reduced by 26% since 2015

Leakage

The following chart shows how Anglian Water are performing in the area of "Leakage", against both their target and also the other water companies.

DP – USE SLIDES 8 AND 9

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Reducing leaks



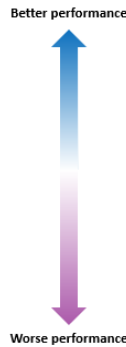
Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment

Leakage per property per day.
Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5th out of 19 companies on this measure

Company	Performance (litres per property day)
Bristol	65.04
Essex and Suffolk	76.40
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.30
Affinity	108.65
South Staffs	113.45
Severn Trent	119.66
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	131.01
Thames	151.51
Welsh Water	158.80

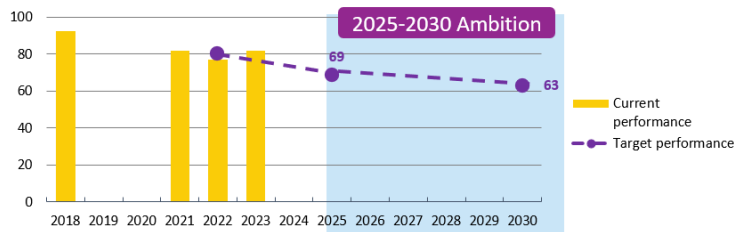


The following chart shows what Anglian Water is proposing to do to improve things:

Reducing leaks



Targets for reducing the amount of water lost due to leaks from water mains and pipes.



Litres per property per day. (A lower number is better.)
Note: figures have been normalised by property

How:

Having been focused on tackling leaks on our network, in 2025-2030 we will concentrate on leaks from customer pipes identified by new smart meters.

Performance:

Leaks have reduced by 7% since 2018

Water Quality Contacts

The following chart shows how Anglian Water are performing in the area of “**Water Quality Contacts**” (where a customer contacts them about the appearance, taste or smell of the water), against both their target and also the other water companies.

DP – USE SLIDES 10 AND 11

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Appearance, taste and smell of tap water



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

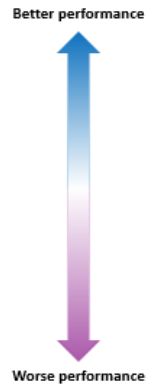
Number of customer contacts received regarding incidents, per 1,000 properties.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 8th out of 17 companies on this measure

Company	Performance (number of contacts)
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.10
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

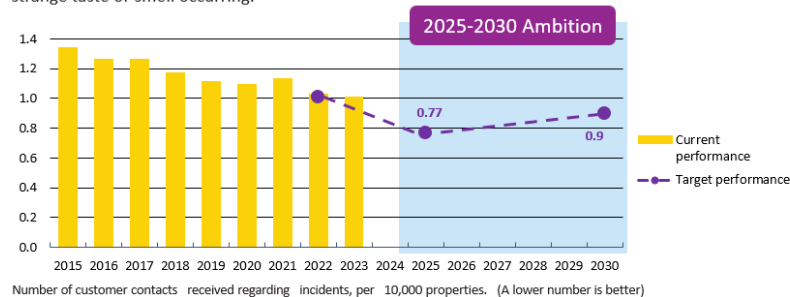


The following chart shows what Anglian Water is proposing to do to improve thing

Appearance, taste and smell of tap water



Targets for reducing the number of incidents of discoloured water (e.g. brown tinge); or a strange taste or smell occurring.



How:

Continue to flush water pipes to remove sediment and undertake planned preventative maintenance. Proactively contact customers about issues, so that they are reassured and don't need to contact us.

Performance:

Contacts relating to water quality have reduced by 25% since 2015

Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

Internal Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “**Internal Sewer Flooding**”, against both their target and also the other water companies. Internal flooding means it enters a property.

DP – USE SLIDES 12 AND 13

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Sewage flooding of properties



An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

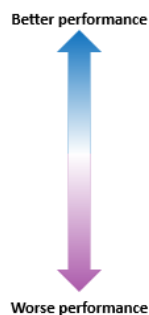
Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 5th out of 11 companies on this measure

Company	Performance (number of properties affected)
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

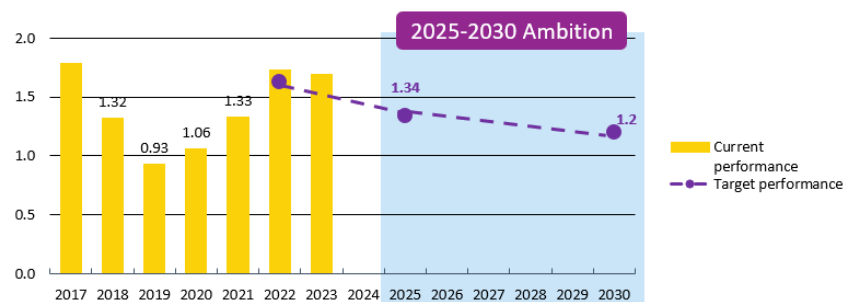


The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



Number of properties affected, per 10,000. (A lower number is better)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of properties has reduced by 5% since 2017

External Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “External Sewer Flooding”, against both their target and also the other water companies.

DP – USE SLIDES 14 AND 15

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Sewage flooding of gardens or outbuildings



An escape of sewage into gardens or access points to peoples’ properties is inconvenient and unpleasant and can restrict access.

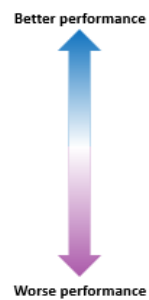
Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3rd out of 11 companies on this measure

Company	Performance (number of properties affected)
Thames	9.40
Severn Trent	10.80
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

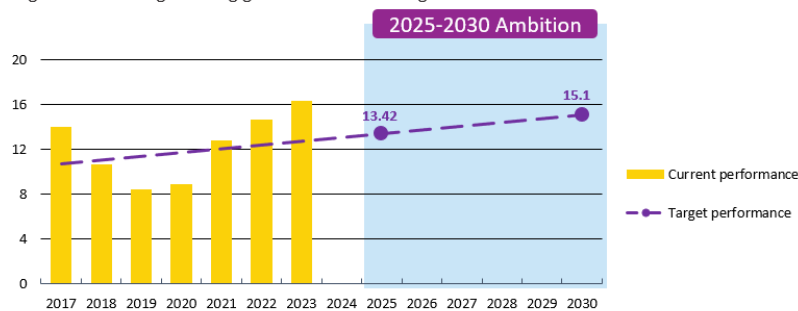


The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



Number of properties affected, per 10,000. (A lower number is better.)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of outbuildings has increased by 17% since 2017

Pollution Incidents

The following chart shows how Anglian Water are performing in the area of “Pollution Incidents”, against both their target and also the other water companies.

DP – USE SLIDES 16 AND 17

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Pollution incidents



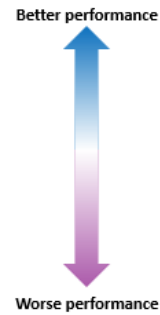
Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale

Number of incidents per 10,000 km of sewer.
Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 8th out of 11 companies on this measure

Company	Performance (number of incidents)
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

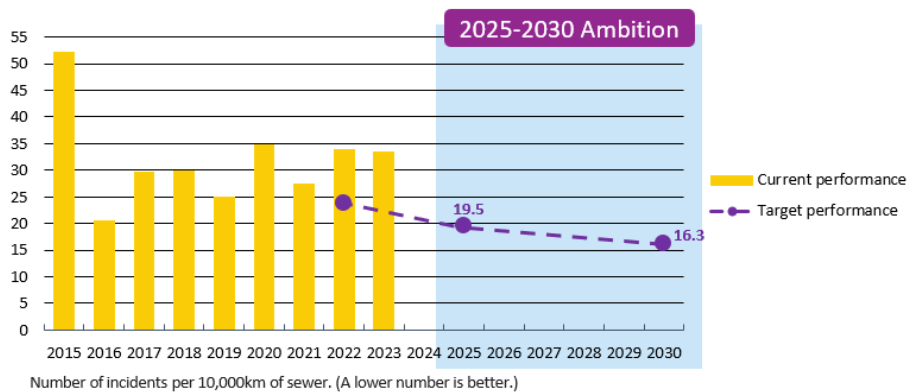


The following chart shows what Anglian Water is proposing to do to improve things:

Pollution incidents



Targets for reducing the number of incidents of pollution of rivers and streams.



How:

Investing in better monitoring of pipes and treatment plants that cause the most serious pollution so that we get early warning and minimise impacts.

Performance:

Pollution has reduced by 36% since 2015

Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Reducing sewer flooding **inside** properties
Reducing sewer flooding **outside** properties
Reducing the number of pollution incidents
Don't know/can't say

The next section will show you six of the key areas of investment in Anglian Water's business plan before asking for your views on the plan as a whole.

Anglian Water proposes investing £3.946 billion in these six areas over the five years from 2025 to 2030.

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will improve drinking water quality.

DP – USE SLIDE 21

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Improving drinking water quality



£210m over five years to 2030
An average customer would pay a total of **£226.73 extra on their bill over five years**

- This investment is to make sure that all of our customers continue to receive high quality drinking water from their taps
- This requires additional development to ensure we can treat:
 - water at sites where nitrate levels are increasing (typically due to use in agriculture in the 20th century)
 - treatment of PFAS (or 'forever chemicals')

The next slide describes another of the additional components of Anglian Water's business plan relating to ensure their network of pipes are resilient to the impacts of climate change and for reaching net zero.

DP – USE SLIDE 22

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Climate resilience and net zero



£459m over five years to 2030

An average customer would pay a total of **£488.91** extra on their bill over five years

- Invest in those assets which are most vulnerable to the effects of climate change
- This mostly relates to pipes which are located in soils which shrink and swell more in extreme weather, placing more pressure on these pipes
- This investment is to improve the ability of these pipes to withstand the impacts of climate change as these effects become more severe in future
- It is part of our longer term plan to protect all of the most vulnerable pipes by 2050 (around 16%) This investment will help to reduce carbon emissions from our operations and support us in doing our bit to help limit global warming
- Our aim is to have net zero emissions by 2030
- Whilst some measures (like improving energy efficiency and changing the source of our electricity to green energy sources) won't require additional investment, we will need to invest to reduce some of the more difficult emissions, like those which result from our water recycling operations

The next slide describes another of the additional components of Anglian Water's business plan relating to how they will ensure there is enough water for all in the future.

DP – USE SLIDE 23

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Balancing water supply and demand



£1.225bn over five years to 2030

An average customer would pay a total of **£1,354.48** extra on their bill over five years

- This investment is to ensure we continue to provide enough water to meet the needs of customers in the Anglian region
- Climate change, population growth and environmental protections mean less water is available for an increasing population
- This includes:
 - investment to reduce the demand for water (e.g. through installing smart meters, reducing leakage and water efficiency measures), and
 - increasing the supply of water available (e.g. by building pipes which transfer water from areas of the Anglian region that have more water to those areas that have less)
- Developing two new reservoirs:
 - to make sure there is enough water available in the long-term as the population increases, and
 - to help ensure water is still available for everyone in the Anglian region even in severe drought periods
- This investment will go towards the early stages of developing these new major reservoirs (which will be built over the next 20 years)

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

Please select one answer only. You can click on the 'i' button to see more information

SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

Improving drinking water quality **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Climate resilience and net zero **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Managing droughts and ensuring sufficient water for all **DP ADD HOVER BUTTON WITH RELEVANT STIM**

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will ensure their waste water network can manage the impact of growth in their supply area.

DP – USE SLIDE 18

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Managing the impact of Growth



£260m over five years to 2030
An average customer would pay a total of £308.17 extra on their bill over five years

- This investment will help us to ensure we can safely recycle waste water from the additional homes we expect to be built in the Anglian region
- This includes:
 - investment to expand our water recycling centres where used water is treated and returned to the environment, and
 - investment to reduce the risk of flooding
- This is part of a longer term plan to ensure services don't get worse in the future as a result of climate change and population growth

The next slide describes another of the additional components of Anglian Water's business plan relating to their environmental ambition.

DP – USE SLIDE 19

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Environmental ambition



£1.199bn over five years to 2030
An average customer would pay a total of £93.32 extra on their bill over five years

- Delivering our environmental obligations to the rivers in our region
- This includes reducing the concentration of nutrients in the water (like phosphates which can contribute to algae growth) to lower levels than ever before
- This is an increase in investment of over 30% compared with 2020-2025
- When used wastewater is treated at our water recycling centres the resulting products are:
 - treated water, which is returned to the environment; and
 - treated sludge, which farmers use in their agricultural practices reducing their demand for artificial fertilisers
- This investment will ensure we continue to have the capacity to manage and treat sludge at our sludge treatment centres as the population grows and to ensure that this sludge is safe to return to the environment

The next slide describes another of the additional components of Anglian Water's business plan relating to how they propose dealing with reducing spills from storm overflows.

DP – USE SLIDE 20

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Reducing spills



£593m over five years to 2030

An average customer would pay a total of £30.30 extra on their bill over five years

- This investment will help to ensure that those spills that prevent rivers achieving good ecological quality are eliminated by 2030
- We will reduce the number of spills from storm overflows at high priority sites (those with the highest environmental impact) by 45% and the overall number of spills from storm overflows by 16%
- We will reduce the average number of spills per overflow from 25 to 20 by 2025, and further reduce this to an average of 10 by 2050

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

Please select one answer only. You can click on the 'i' button to see more information

SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

Reducing spills **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Environmental ambition **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Managing growth **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Acceptability of Anglian Water's Proposed Business Plan

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Completely acceptable **GO TO 0**

Acceptable **GO TO 0**

Unacceptable **GO TO 0**

Completely unacceptable **GO TO 0**

Don't know/can't say

IF 0=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

The bill increases are too expensive

Company profits are too high

Companies should pay for service improvements

I expect better service improvements

The plan is poor value for money

Compared to energy prices it is more expensive

I am dissatisfied with current services

The plans don't focus on the right services
I won't be able to afford this
I don't trust them to make these service improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

DP PLEASE ADD A TIMESTAMP

IF 0=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**
Please choose up to two answers only

The plan is good value for money
The plan is affordable
Compared to energy prices it's cheaper
Their plans seem to focus on the right services
The company provides a good service now
I support what they are trying to do in the long term
The change to my bill is small
I trust them to do what's best for customers
I have been dissatisfied with the service recently but am pleased that they are making improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

DP PLEASE ADD A TIMESTAMP

Long Term Plans

Long term investment (up to 2050) by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Delaying investment helps to keep bill increases affordable in the short term. But if it is delayed for too long, services could get worse in the future. Which one of the following options would you prefer? **SINGLECODE**
Please select one answer only

An increase in bills starting sooner, spreading increases across different generations of bill-payers. This would reduce the risk of services getting worse in the future.
An increase in bills starting later, putting more of the increases onto younger and future bill-payers. This helps to keep bill increases affordable in the short term.
I don't know enough at the moment to give an answer

HH ONLY: Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female

Male
I identify in another way
Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed
Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife/Househusband
Unemployed
Retired **GO TO 0**
Student
Prefer not to say

IF Error! Reference source not found.=RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only
Private only
Both
Prefer not to say

IF Q38=2 or 3 ASK: How would you describe the main income earner's occupation type before retirement?

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed
Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife / househusband
Unemployed
Student
None of these
Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses)

CODED AS COMMUNICATIONS VULNERABILITY

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

Please select one answer only

WHITE

English, Anglian, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

MIXED

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

BLACK OR BLACK BRITISH

Caribbean

African

Any other Black background

OTHER ETHNIC GROUP

Arab

Any other ethnic group

Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year

From £1,000 to £1,399 a week/From £52,000 to £72,799 a year

From £1,400 to £1,999 a week/From £72,800 to £103,999 a year

£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

GO TO 0

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here: [insert link to AWS's social tariff support page](#)

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)

For the supply of services your organisation provides (eg cleaning services etc)

For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)

None of the above

Don't Know

How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250+

Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities

Professional, scientific and technical activities
Administrative and Support Service Activities
Public administration and defence
Education
Human health and social work activities
Arts, entertainment and recreation
Other service activities
Other (please specify)
Prefer not to say

Thank you

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS
M&S Voucher by email COLLECT EMAIL ADDRESS
One4All by email COLLECT EMAIL ADDRESS
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes
No

E&SW version



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Anglian Water, your wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

The survey will only take around 20 minutes of your time. To say thank you for taking part, anyone eligible who completes the survey will get a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Or you can ask to donate the money to WaterAid instead. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions unless asked to do so.

Do you agree to proceed with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Prefer not to say **THANK AND CLOSE**

CODE AS Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

IF HH: Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

IF ERROR! REFERENCE SOURCE NOT FOUND.=2 SHOW: Essex and Suffolk Water is your water supplier and Anglian Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your site's water and sewerage service at any of its premises?

Yes

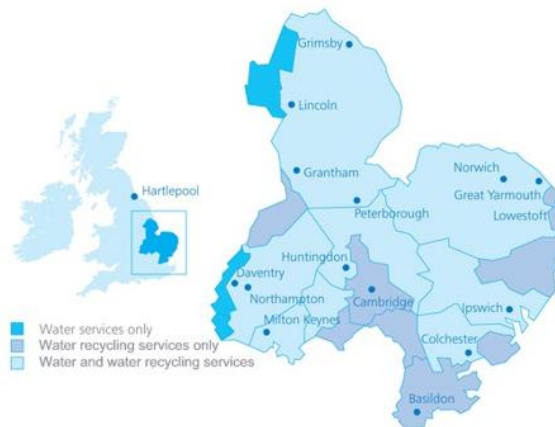
No **THANK AND CLOSE**

IF NHH: How many sites does your organisation have in any of the area below served by Anglian Water? Please use the map below to show the areas served by Anglian Water, including Hartlepool.

DP – USE SLIDE 1

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Anglian Water Supply Area



0 **THANK AND CLOSE**

1

2 or more

Don't know **THANK AND CLOSE**

IF NHH: When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Anglian Water area. Is that OK?

Yes

No **THANK AND CLOSE**

Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 20 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Affordability

We like to start by understanding a little bit about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time

Most of the time

Sometimes

Rarely

Never

Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

[IF HH] Living/**[IF NHH]** Operating comfortably
Doing alright
Just about getting by
Finding it quite difficult
Finding it very difficult
Prefer not to say

Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
A lot worse
A bit worse
Stay the same
A bit better
A lot better
Prefer not to say
Don't know

IF NHH: How much are you currently paying Anglian Water for your water and sewerage services bill, **each year?**

[Open-ended answer] **DP PLEASE ADD TEXT BOX**
Don't know

[all] How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

IF NHH: At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Anglian Water have.

Please could you go to [HTTPS://acsvy.com/3601](https://acsvy.com/3601)

You should see a thank you note, then on the next page somewhere to put your annual water and/or sewerage bill amount into. Please enter the bill for all sites your company operates in the Anglian Water area. An estimate is absolutely fine.

Interviewer note: do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

Proposed changes to your water/sewerage bill for the years 2025-2030.

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- *If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.*
- *If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.*
- *If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.*

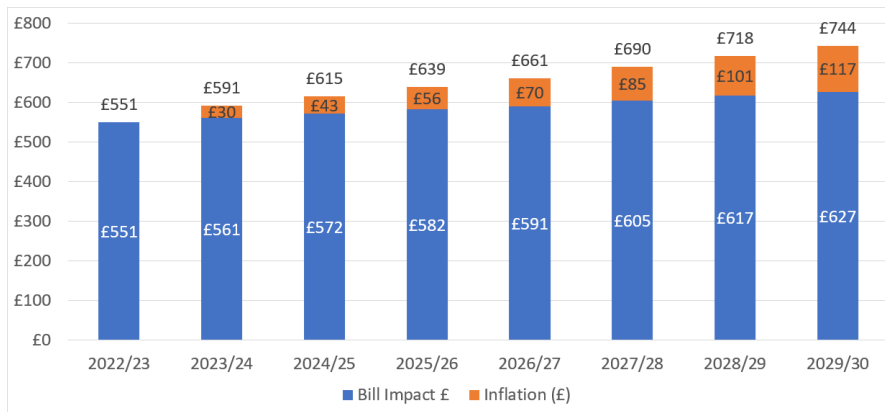
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services Anglian Water think they needed over the next few years.

The following chart shows the expected increase in your **water and sewerage** bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



IF SOCIAL TARIFF CUSTOMER (FROM SAMPLE TARIFF IS NOT EQUAL TO “STANDARD”): This bill profile is based on the financial support scheme you are currently on.

IF QNEWBILL = D/K: This bill profile is based on the average household bill

IF 0=’DON’T KNOW’: This bill profile is based on an example bill of £1,000.

[ASK ALL]

[IF HH] How easy or difficult do you think it would be for you to afford these water and sewerage bills? **[IF NHH & 0 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these water and sewerage bills? **[IF NHH & 0 = D/K]** How easy or difficult do you think it would be for your organisation to afford its water and sewerage bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON’T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO 0**
- Fairly difficult **HH ONLY GO TO 0**
- Very difficult **HH ONLY GO TO 0**
- Don’t know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON’T KNOW**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Change employment to earn more
- Take a second (or more) job to increase household income
- Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**
- Don’t know

DP PLEASE ADD A TIMESTAMP

Thinking about **[IF HH]** the two previous questions **[IF NHH]** the previous question, how much did you base your responses on the impacts of the proposed bills on your **[IF HH]** personal household **[IF NHH]** company/organisation finances and wider society?

DP PLEASE INSERT A 5-POINT SLIDING SCALE FROM ‘Only thinking about my **[IF HH]** household finances **[IF NHH]** your company/organisation finances’ **TO** ‘Only thinking about wider society’

Anglian Water’s Plans

We are now going to ask you some questions about your views on Anglian Water’s business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

Water company performance is monitored across a number of areas to ensure they deliver against their business plan objectives. We are now going to show you Anglian Water’s plans in three areas related to sewerage services:

- Sewage flooding of properties
- Sewage flooding of gardens or outbuildings
- Pollution incidents

Internal Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “**Internal Sewer Flooding**”, against both their target and also the other water companies.

Internal flooding means it enters a property.

DP – USE SLIDES 12 AND 13

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Sewage flooding of properties



An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

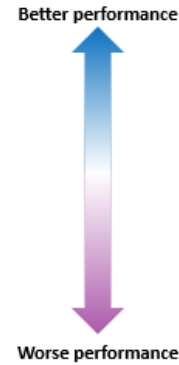
Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 5th out of 11 companies on this measure

Company	Performance (number of properties affected)
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

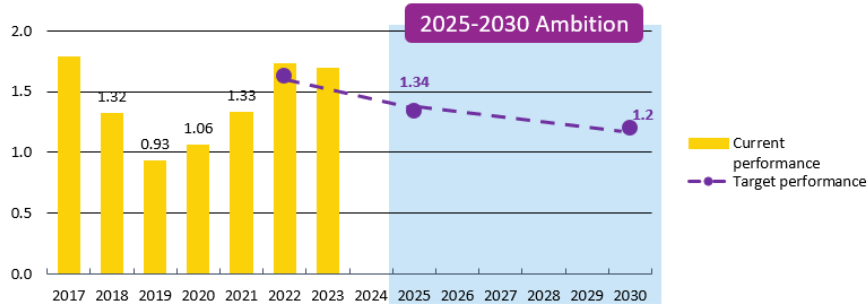


The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



Number of properties affected, per 10,000. (A lower number is better)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of properties has reduced by 5% since 2017

External Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “External Sewer Flooding”, against both their target and also the other water companies.

DP – USE SLIDES 14 AND 15

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Sewage flooding of gardens or outbuildings



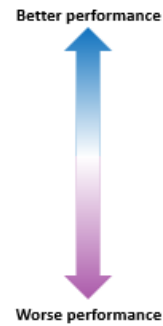
An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.

Number of properties affected, per 10,000.
Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3rd out of 11 companies on this measure

Company	Performance (number of properties affected)
Thames	9.40
Severn Trent	10.80
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

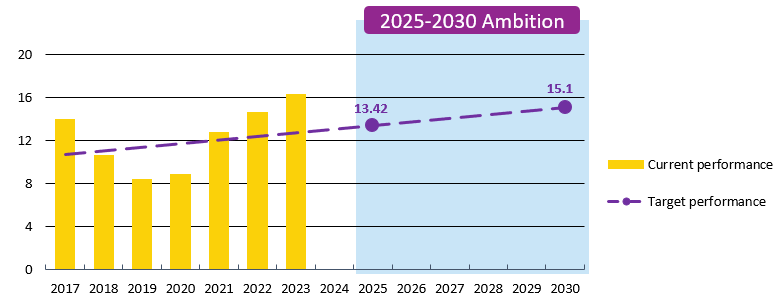


The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



Number of properties affected, per 10,000. (A lower number is better.)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of outbuildings has increased by 17% since 2017

Pollution Incidents

The following chart shows how Anglian Water are performing in the area of "Pollution Incidents", against both their target and also the other water companies.

DP – USE SLIDES 16 AND 17

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Pollution incidents



Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale

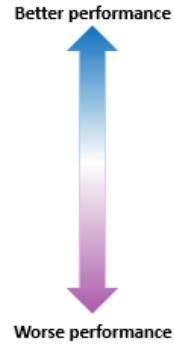
Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 8th out of 11 companies on this measure

Company	Performance (number of incidents)
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

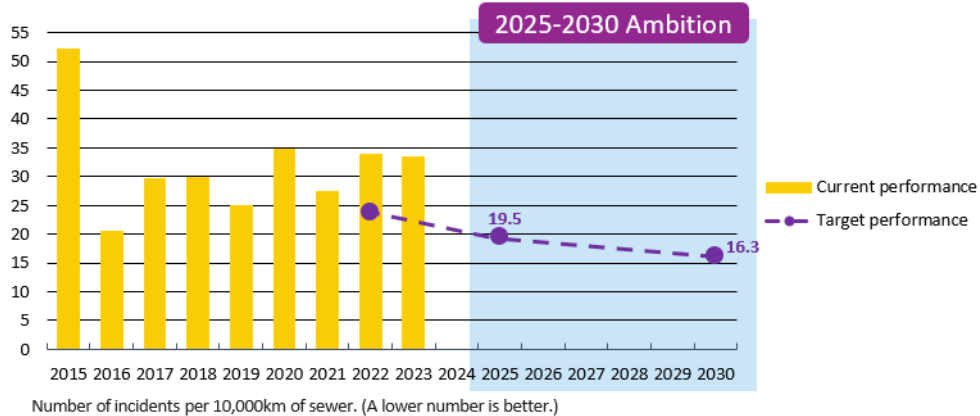


The following chart shows what Anglian Water is proposing to do to improve things:

Pollution incidents



Targets for reducing the number of incidents of pollution of rivers and streams.



How:

Investing in better monitoring of pipes and treatment plants that cause the most serious pollution so that we get early warning and minimise impacts.

Performance:

Pollution has reduced by 36% since 2015

Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing sewer flooding **inside** properties
- Reducing sewer flooding **outside** properties
- Reducing the number of pollution incidents
- Don't know/can't say

The next section will show you three of the key areas of investment in Anglian Water's business plan before asking for your views on the plan as a whole.

Anglian Water proposes investing £2.052 billion in these three areas over the five years from 2025 to 2030.

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will ensure their waste water network can manage the impact of growth in their supply area.

DP – USE SLIDE 18

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Managing the impact of Growth



£260m over five years to 2030

An average customer would pay a total of £308.17 extra on their bill over five years

- This investment will help us to ensure we can safely recycle waste water from the additional homes we expect to be built in the Anglian region
- This includes:
 - investment to expand our water recycling centres where used water is treated and returned to the environment, and
 - investment to reduce the risk of flooding
- This is part of a longer term plan to ensure services don't get worse in the future as a result of climate change and population growth

The next slide describes another of the additional components of Anglian Water's business plan relating to their environmental ambition.

DP – USE SLIDE 19

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Environmental ambition

£1.199bn over five years to 2030
An average customer would pay a total of **£93.32 extra on their bill over five years**



- Delivering our environmental obligations to the rivers in our region
- This includes reducing the concentration of nutrients in the water (like phosphates which can contribute to algae growth) to lower levels than ever before
- This is an increase in investment of over 30% compared with 2020-2025
- When used wastewater is treated at our water recycling centres the resulting products are:
 - treated water, which is returned to the environment; and
 - treated sludge, which farmers use in their agricultural practices reducing their demand for artificial fertilisers
- This investment will ensure we continue to have the capacity to manage and treat sludge at our sludge treatment centres as the population grows and to ensure that this sludge is safe to return to the environment


The next slide describes another of the additional components of Anglian Water's business plan relating to how they propose dealing with reducing spills from storm overflows.

DP – USE SLIDE 20

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Reducing spills

£593m over five years to 2030
An average customer would pay a total of **£30.30 extra on their bill over five years**



- This investment will help to ensure that those spills that prevent rivers achieving good ecological quality are eliminated by 2030
- We will reduce the number of spills from storm overflows at high priority sites (those with the highest environmental impact) by 45% and the overall number of spills from storm overflows by 16%
- We will reduce the average number of spills per overflow from 25 to 20 by 2025, and further reduce this to an average of 10 by 2050

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

Please select one answer only

SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

Reducing spills **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Environmental ambition **DP ADD HOVER BUTTON WITH RELEVANT STIM**
Managing growth **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Acceptability of Anglian Water's Proposed Business Plan

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Completely acceptable **GO TO 05**
Acceptable **GO TO 0**
Unacceptable **GO TO 0**
Completely unacceptable **GO TO 0**
Don't know/can't say

IF 0=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

The bill increases are too expensive
Company profits are too high
Companies should pay for service improvements
I expect better service improvements
The plan is poor value for money
Compared to energy prices it is more expensive
I am dissatisfied with current services
The plans don't focus on the right services
I won't be able to afford this
I don't trust them to make these service improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

DP PLEASE ADD A TIMESTAMPS

IF 0=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

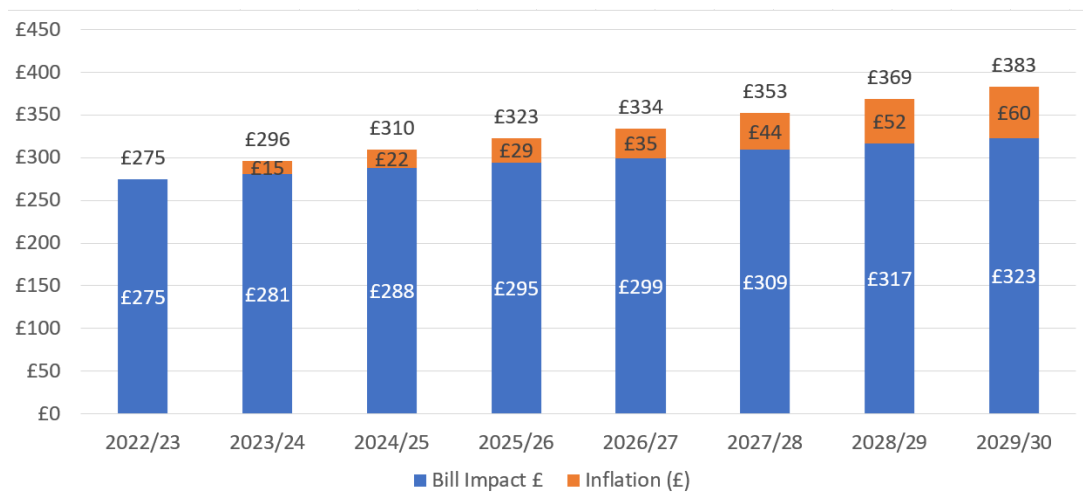
The plan is good value for money
The plan is affordable
Compared to energy prices it's cheaper
Their plans seem to focus on the right services
The company provides a good service now
I support what they are trying to do in the long term
The change to my bill is small
I trust them to do what's best for customers
I have been dissatisfied with the service recently but am pleased that they are making improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

DP PLEASE ADD A TIMESTAMP

The following chart shows the expected increase in the **sewerage only component** of your bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



IF SOCIAL TARIFF CUSTOMER (FROM SAMPLE): This bill profile is based on the financial support scheme you are currently on.

IF 0='DON'T KNOW': This bill profile is based on an example bill of £500.

[IF HH] How easy or difficult do you think it would be for you to afford these sewerage bills? **[IF NHH & 0 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these sewerage bills? **[IF NHH & 0 = D/K]** How easy or difficult do you think it would be for your organisation to afford its sewerage bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

DP PLEASE ADD TIMESTAMP

Long Term Plans

Long term investment (up to 2050) by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Delaying investment helps to keep bill increases affordable in the short term. But if it is delayed for too long, services could get worse in the future. Which one of the following options would you prefer? **SINGLECODE**

Please select one answer only

An increase in bills starting sooner, spreading increases across different generations of bill-payers. This would reduce the risk of services getting worse in the future.

An increase in bills starting later, putting more of the increases onto younger and future bill-payers. This helps to keep bill increases affordable in the short term.

I don't know enough at the moment to give an answer

HH ONLY: Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female

Male

I identify in another way

Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)

Intermediate managerial, administrative or professional e.g. teacher, manager, accountant

Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed

Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver

Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO 0**

Student

Prefer not to say

IF Error! Reference source not found.=RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only

Private only

Both

Prefer not to say

IF 0= PRIVATE OR BOTH ASK: How would you describe the main income earner's occupation type before retirement?

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)

Intermediate managerial, administrative or professional e.g. teacher, manager, accountant

Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed

Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver

Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

Please select one answer only

WHITE

English, Anglian, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

MIXED

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian

Pakistani

Bangladeshi
Chinese
Any other Asian background

BLACK OR BLACK BRITISH

Caribbean
African
Any other Black background

OTHER ETHNIC GROUP

Arab
Any other ethnic group
Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year
From £200 to £299 a week/From £10,400 to £15,599 a year
From £300 to £499 a week/From £15,600 to £25,999 a year
From £500 to £699 a week/From £26,000 to £36,399 a year
From £700 to £999 a week/From £36,400 to £51,999 a year
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
£2,000 and above a week/£104,000 and above a Year
Don't know
Prefer not to say

GO TO 0

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

<https://www.anglianwater.co.uk/help-and-advice/water-care/extra-care-support>

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)
For the supply of services your organisation provides (eg cleaning services etc)
For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)
For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)
None of the above
Don't Know

How many sites in the UK does your organisation operate from?

1
2
3
4
5-10

11-50
51-250
250+
Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)
1 to 9 employees (micro)
10 to 49 employees (small)
50 to 249 employees (medium)
250+ employees (large)
Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing
Mining and quarrying
Energy or water service & supply
Manufacturing
Construction
Wholesale and retail trade (including motor vehicles repair)
Transport and storage
Hotels & catering
IT and Communication
Finance and insurance activities
Real estate activities
Professional, scientific and technical activities
Administrative and Support Service Activities
Public administration and defence
Education
Human health and social work activities
Arts, entertainment and recreation
Other service activities
Other (please specify)
Prefer not to say

Thank you

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS
M&S Voucher by email COLLECT EMAIL ADDRESS
One4All by email COLLECT EMAIL ADDRESS
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes
No

Hartlepool area



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Anglian Water, your water service providers, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

The survey will only take around 20 minutes of your time. To say thank you for taking part, anyone eligible who completes the survey will get a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Or you can ask to donate the money to WaterAid instead. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions unless asked to do so.

Do you agree to proceed with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Prefer not to say **THANK AND CLOSE**

CODE AS Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

IF HH: Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Anglian Water is your water supplier and Northumbrian Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your site's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

IF NHH: How many sites does your organisation have in any of the area below served by Anglian Water? Please use the map below to show the areas served by Anglian Water, including Hartlepool.

DP – USE SLIDE 1

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Anglian Water Supply Area



0 **THANK AND CLOSE**

1

2 or more

Don't know **THANK AND CLOSE**

IF NHH: When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Anglian Water area. Is that OK?

Yes

No **THANK AND CLOSE**

Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 20 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Affordability

We like to start by understanding a little bit about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time

Most of the time

Sometimes

Rarely

Never

Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

[IF HH] Living/**[IF NHH]** Operating comfortably
Doing alright
Just about getting by
Finding it quite difficult
Finding it very difficult
Prefer not to say

Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
A lot worse
A bit worse
Stay the same
A bit better
A lot better
Prefer not to say
Don't know

IF NHH: How much are you currently paying Anglian Water for your water and sewerage services bill, **each year?**

[Open-ended answer] **DP PLEASE ADD TEXT BOX**
Don't know

[all] How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

IF NHH: At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Anglian Water have.

Please could you go to [HTTPS://acsvy.com/3601](https://acsvy.com/3601)

You should see a thank you note, then on the next page somewhere to put your annual water and/or sewerage bill amount into. Please enter the bill for all sites your company operates in the Anglian Water area. An estimate is absolutely fine.

Interviewer note: do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

Proposed changes to your water/sewerage bill for the years 2025-2030.

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- *If your household income keeps up with inflation (i.e. increases at the same rate), then you are likely to notice little difference in what you are paying for things.*
- *If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.*
- *If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.*

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services Anglian Water think they needed over the next few years.

The following chart shows the expected increase in your **water and sewerage** bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

INSERT BILL.

(Placeholder – this graph will be tailored according to bill amounts) using:

IF SOCIAL TARIFF CUSTOMER (FROM SAMPLE TARIFF IS NOT EQUAL TO “STANDARD”): This bill profile is based on the financial support scheme you are currently on.

IF QNEWBILL = D/K: This bill profile is based on the average household bill

IF 0=’DON’T KNOW’: This bill profile is based on an example bill of £1,000.

[ASK ALL]

[IF HH] How easy or difficult do you think it would be for you to afford these water/sewerage bills? **[IF NHH & 0 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills? **[IF NHH & 0 = D/K]** How easy or difficult do you think it would be for your organisation to afford its water/water and sewerage/sewerage bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON’T KNOW**

Very easy

Fairly easy

Neither easy nor difficult **HH ONLY GO TO 0**

Fairly difficult **HH ONLY GO TO 0**

Very difficult **HH ONLY GO TO 0**

Don’t know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON’T KNOW**

Shopping around more

Spending less on food shopping and essentials

Spending less on non-essentials

Cutting back on non-essential journeys in my vehicle

Eat out less

Using less fuel such as gas or electricity in my home

Using less water

Using my savings

Using credit more than usual, for example, credit cards, loans or overdrafts

Ask family and friends for financial support

Change employment to earn more

Take a second (or more) job to increase household income

Other, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Don’t know

DP PLEASE ADD A TIMESTAMP

Thinking about **[IF HH]** the two previous questions **[IF NHH]** the previous question, how much did you base your responses on the impacts of the proposed bills on your **[IF HH]** personal household **[IF NHH]** company/organisation finances and wider society?

DP PLEASE INSERT A 5-POINT SLIDING SCALE FROM ‘Only thinking about my **[IF HH]** household finances **[IF NHH]** your company/organisation finances’ **TO** ‘Only thinking about wider society’

Anglian Water's Plans

We are now going to ask you some questions about your views on Anglian Water's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

IF HW CUSTOMERS Q0=1: Water company performance is monitored across a number of areas to ensure they deliver against their business plan objectives. We are now going to show you Anglian Water's plans in three areas that relate to the provision of clean water services:

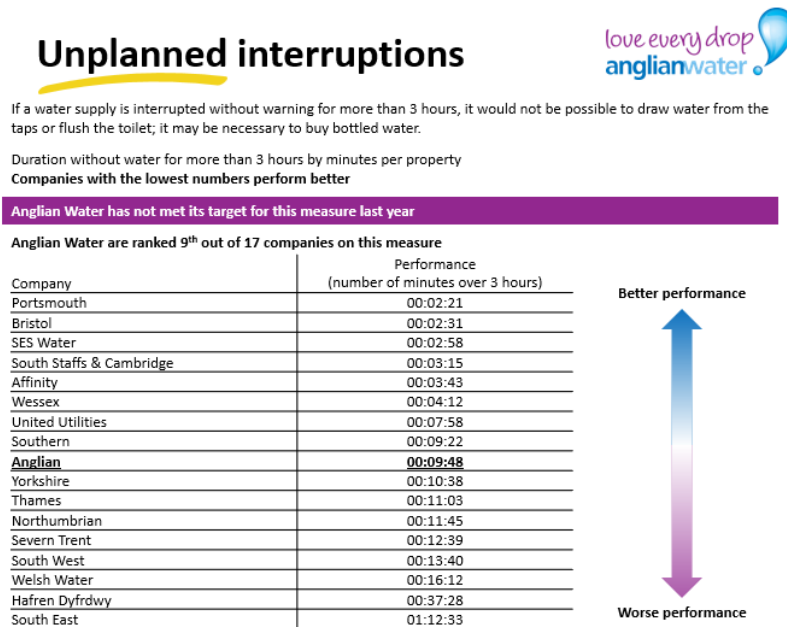
- Appearance, taste and smell of tap water
- Leakage
- Unplanned water supply interruptions

Unplanned Water Supply Interruptions.

The following chart shows how Anglian Water are performing in the area of "Unplanned Water Supply Interruptions", against both their target and also the other water companies.

DP – USE SLIDES 6 AND 7

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

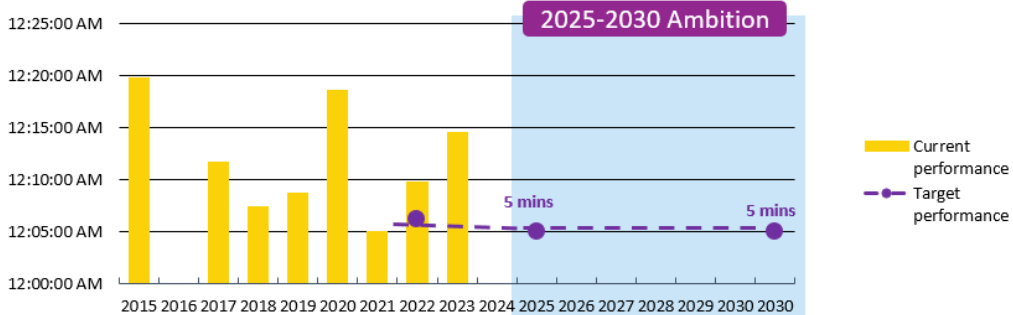


The following chart shows Anglian Water's proposed targets for reducing the length of time properties are without water on an average year:

Unplanned interruptions



Targets for reducing the length of time properties are without water.



Duration without water for more than 3 hours by minutes per property. (A lower number is better)

How:

Use smart networks with sensors and automation to improve data analysis and decision making to proactively deal with problems or resolve them faster.

Performance:

Interruptions have reduced by 26% since 2015

Leakage

The following chart shows how Anglian Water are performing in the area of “Leakage”, against both their target and also the other water companies.

DP – USE SLIDES 8 AND 9

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Reducing leaks



Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment

Leakage per property per day.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5th out of 19 companies on this measure

Company	Performance (litres per property day)
Bristol	65.04
Essex and Suffolk	76.40
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.30
Affinity	108.65
South Staffs	113.45
Severn Trent	119.66
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	131.01
Thames	151.51
Welsh Water	158.80

Better performance

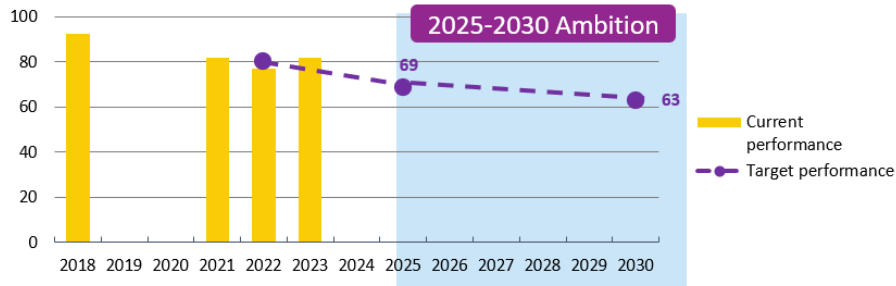
Worse performance

The following chart shows what Anglian Water is proposing to do to improve things:

Reducing leaks



Targets for reducing the amount of water lost due to leaks from water mains and pipes.



Litres per property per day. (A lower number is better.)
Note: figures have been normalised by property

How:

Having been focused on tackling leaks on our network, in 2025-2030 we will concentrate on leaks from customer pipes identified by new smart meters.

Performance:

Leaks have reduced by 7% since 2018

Water Quality Contacts

The following chart shows how Anglian Water are performing in the area of “Water Quality Contacts” (where a customer contacts them about the appearance, taste or smell of the water), against both their target and also the other water companies.

DP – USE SLIDES 10 AND 11

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Appearance, taste and smell of tap water



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Number of customer contacts received regarding incidents, per 1,000 properties.
Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 8th out of 17 companies on this measure

Company	Performance (number of contacts)
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.10
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

Better performance



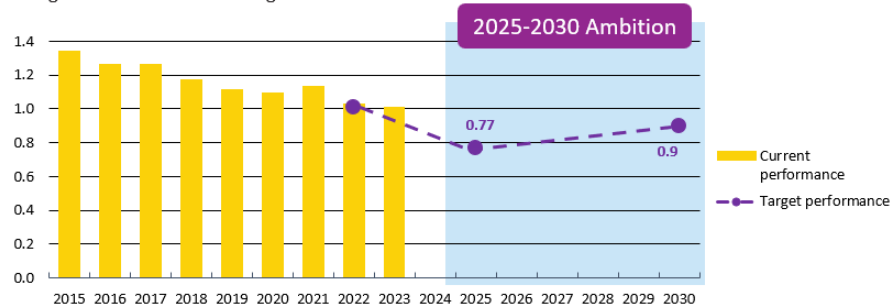
Worse performance

The following chart shows what Anglian Water is proposing to do to improve things:

Appearance, taste and smell of tap water



Targets for reducing the number of incidents of discoloured water (e.g. brown tinge); or a strange taste or smell occurring.



Number of customer contacts received regarding incidents, per 10,000 properties. (A lower number is better)

How:

Continue to flush water pipes to remove sediment and undertake planned preventative maintenance. Proactively contact customers about issues, so that they are reassured and don't need to contact us.

Performance:

Contacts relating to water quality have reduced by 25% since 2015

Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

The next section will show you three of the key areas of investment in Anglian Water's business plan before asking for your views on the plan as a whole.

Anglian Water proposes investing £1.894 billion in these three areas over the five years from 2025 to 2030.

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will improve drinking water quality.

DP – USE SLIDE 21

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Improving drinking water quality



£210m over five years to 2030

An average customer would pay a total of £226.73 extra on their bill over five years

- This investment is to make sure that all of our customers continue to receive high quality drinking water from their taps
- This requires additional development to ensure we can treat:
 - water at sites where nitrate levels are increasing (typically due to use in agriculture in the 20th century)
 - treatment of PFAS (or 'forever chemicals')

The next slide describes another of the additional components of Anglian Water's business plan relating to ensure their network of pipes are resilient to the impacts of climate change and for reaching net zero.

DP – USE SLIDE 22

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Climate resilience and net zero



£459m over five years to 2030

An average customer would pay a total of £488.91 extra on their bill over five years

- Invest in those assets which are most vulnerable to the effects of climate change
- This mostly relates to pipes which are located in soils which shrink and swell more in extreme weather, placing more pressure on these pipes
- This investment is to improve the ability of these pipes to withstand the impacts of climate change as these effects become more severe in future
- It is part of our longer term plan to protect all of the most vulnerable pipes by 2050 (around 16%) This investment will help to reduce carbon emissions from our operations and support us in doing our bit to help limit global warming
- Our aim is to have net zero emissions by 2030
- Whilst some measures (like improving energy efficiency and changing the source of our electricity to green energy sources) won't require additional investment, we will need to invest to reduce some of the more difficult emissions, like those which result from our water recycling operations

The next slide describes another of the additional components of Anglian Water's business plan relating to how they will ensure there is enough water for all in the future.

DP – USE SLIDE 23

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

Balancing water supply and demand

£1.225bn over five years to 2030

An average customer would pay a total of £1,354.48 extra on their bill over five years



- This investment is to ensure we continue to provide enough water to meet the needs of customers in the Anglian region
- Climate change, population growth and environmental protections mean less water is available for an increasing population
- This includes:
 - investment to reduce the demand for water (e.g. through installing smart meters, reducing leakage and water efficiency measures), and
 - increasing the supply of water available (e.g. by building pipes which transfer water from areas of the Anglian region that have more water to those areas that have less)
- Developing two new reservoirs:
 - to make sure there is enough water available in the long-term as the population increases, and
 - to help ensure water is still available for everyone in the Anglian region even in severe drought periods
- This investment will go towards the early stages of developing these new major reservoirs (which will be built over the next 20 years)

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

Please select one answer only

SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

Improving drinking water quality **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Climate resilience and net zero **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Managing droughts and ensuring sufficient water for all **DP ADD HOVER BUTTON WITH RELEVANT STIM**

Acceptability of Anglian Water's Proposed Business Plan

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Completely acceptable **GO TO 0**

Acceptable **GO TO 0**

Unacceptable **GO TO 0**

Completely unacceptable **GO TO 0**

Don't know/can't say

IF 0=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Don't know/ can't say

DP PLEASE ADD A TIMESTAMP

IF 0=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
- Don't know/ can't say

DP PLEASE ADD A TIMESTAMP

The following chart shows the expected increase in the **water only component** of your bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

INSERT SINGLE SERVICE BILL.

(Placeholder – this graph will be tailored according to bill amounts) using:

IF SOCIAL TARIFF CUSTOMER (FROM SAMPLE): This bill profile is based on the financial support scheme you are currently on.

IF 0='DON'T KNOW': This bill profile is based on an example bill of £500.

[IF HH] How easy or difficult do you think it would be for you to afford these water bills? **[IF NHH & 0 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these water bills? **[IF NHH & 0 = D/K]** How easy or difficult do you think it would be for your organisation to afford its water bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

DP PLEASE ADD TIMESTAMP

Long Term Plans

Long term investment (up to 2050) by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Delaying investment helps to keep bill increases affordable in the short term. But if it is delayed for too long, services could get worse in the future. Which one of the following options would you prefer? **SINGLECODE**

Please select one answer only

An increase in bills starting sooner, spreading increases across different generations of bill-payers. This would reduce the risk of services getting worse in the future.

An increase in bills starting later, putting more of the increases onto younger and future bill-payers. This helps to keep bill increases affordable in the short term.

I don't know enough at the moment to give an answer

DP: PLEASE ADD A 7 SECOND DELAY TO THIS SCREEN

HH ONLY: Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female
Male
I identify in another way
Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)

Intermediate managerial, administrative or professional e.g. teacher, manager, accountant

Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed

Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver

Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO 0**

Student

Prefer not to say

IF Error! Reference source not found.=RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only

Private only

Both

Prefer not to say

IF Error! Reference source not found.=RETIRED ASK: How would you describe the main income earner's occupation type before retirement?

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)

Intermediate managerial, administrative or professional e.g. teacher, manager, accountant

Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed

Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver

Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

Please select one answer only

WHITE

English, Anglian, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

MIXED

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

BLACK OR BLACK BRITISH

Caribbean

African

Any other Black background

OTHER ETHNIC GROUP

Arab

Any other ethnic group

Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year

From £1,000 to £1,399 a week/From £52,000 to £72,799 a year

From £1,400 to £1,999 a week/From £72,800 to £103,999 a year

£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

GO TO 0

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here: [insert link to AWS's social tariff support page](https://www.anglianwater.co.uk/help-and-advice/water-care/extra-care-support)
<https://www.anglianwater.co.uk/help-and-advice/water-care/extra-care-support>

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)

For the supply of services your organisation provides (eg cleaning services etc)

For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)

None of the above

Don't Know

How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250+

Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities

Professional, scientific and technical activities

Administrative and Support Service Activities
Public administration and defence
Education
Human health and social work activities
Arts, entertainment and recreation
Other service activities
Other (please specify)
Prefer not to say

Thank you

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS
M&S Voucher by email COLLECT EMAIL ADDRESS
One4All by email COLLECT EMAIL ADDRESS
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes
No

APPENDIX F

Questionnaire (Paper version – example)



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help Anglian Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

The survey will only take around 20 minutes of your time. To say thank you for taking part, **anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Or you can ask to donate the money to WaterAid instead. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **20th September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

When completing the survey please start from Question 1 (Q1) in the 'Scoping questions' section.

If at any point in the 'Scoping questions' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the 'Scoping questions' section without that message appearing next to any of your answers please go to the "Main questionnaire" and follow the questionnaire order.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Do you or any of your close family work in market research or for a water company?

Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

No

How old are you? Please enter your age.

Please enter your age on the line below

Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Anglian Water is your water supplier and is responsible for your sewerage services. Does this sound right?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know

Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 20 minutes to complete.

Main Questionnaire

Affordability

We like to start by understanding a little bit about your household's financial situation.

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

Please select one answer only

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

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

Please select one answer only

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

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

Please select one answer only

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

How easy or difficult is it for you to afford to pay your current water and sewerage bill:

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- *If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.*
- *If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.*
- *If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.*

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services Anglian Water think they needed over the next few years.

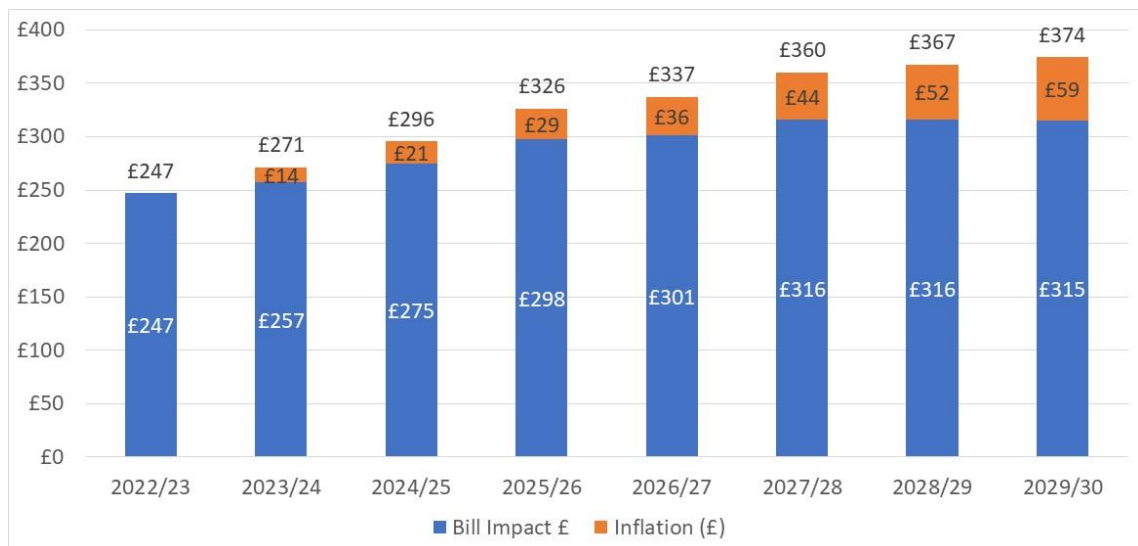
The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So, your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



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

Please select one answer only

- Very easy **Please skip question 12**
- Fairly easy **Please skip question 12**
- Neither easy nor difficult **Please go to Question 12**
- Fairly difficult **Please go to Question 12**
- Very difficult **Please go to Question 12**
- Don't know

Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)

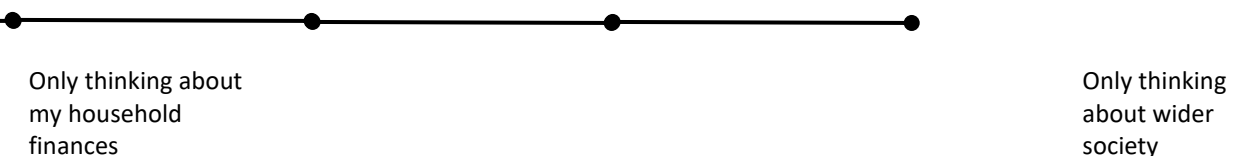
Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

Please select all that apply

- Shopping around more
 - Spending less on food shopping and essentials
 - Spending less on non-essentials
 - Cutting back on non-essential journeys in my vehicle
 - Eat out less
 - Using less fuel such as gas or electricity in my home
 - Using less water
 - Using my savings
 - Using credit more than usual, for example, credit cards, loans or overdrafts
 - Ask family and friends for financial support
 - Other, please specify:
-
- Don't know

Thinking about the two previous questions, how much did you base your responses on the impacts of the proposed bills on your personal household and wider society?

Please indicate the point of the scale below that reflects your view



Anglian Water's Plans

We are now going to ask you some questions about your views on Anglian Water's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

Water company performance is monitored across a number of areas to ensure they deliver against their business plan objectives. We are now going to show you Anglian Water's plans in six areas, starting with three that relate to the provision of clean water services, followed by three that related to sewerage services:

- Appearance, taste and smell of tap water
- Leakage
- Unplanned water supply interruptions
- Sewage flooding of properties
- Sewage flooding of gardens or outbuildings
- Pollution incidents

Unplanned Water Supply Interruptions.

The following chart shows how Anglian Water are performing in the area of “Unplanned Water Supply Interruptions”, against both their target and also the other water companies.

Unplanned interruptions



If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Duration without water for more than 3 hours by minutes per property
Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 9th out of 17 companies on this measure

Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance



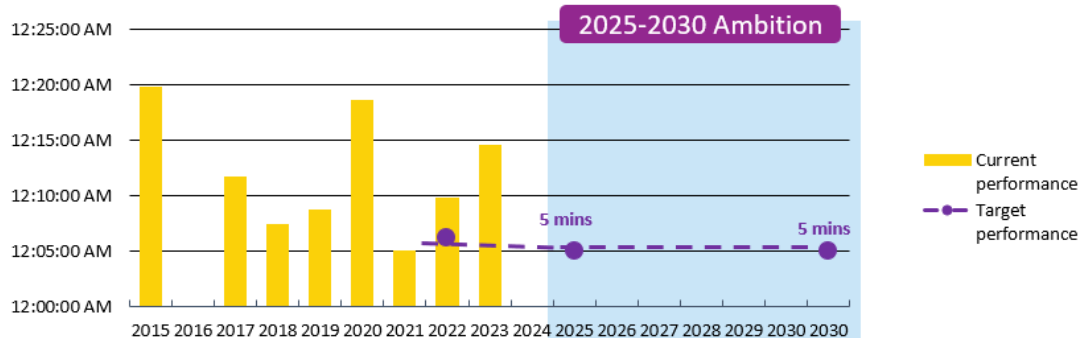
Worse performance

The following chart shows Anglian Water's proposed targets for reducing the length of time properties are without water on an average year:

Unplanned interruptions



Targets for reducing the length of time properties are without water.



Duration without water for more than 3 hours by minutes per property. (A lower number is better)

How:

Use smart networks with sensors and automation to improve data analysis and decision making to proactively deal with problems or resolve them faster.

Performance:

Interruptions have reduced by 26% since 2015

Leakage

The following chart shows how Anglian Water are performing in the area of “Leakage”, against both their target and also the other water companies.

Reducing leaks



Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment

Leakage per property per day.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5th out of 19 companies on this measure

Company	Performance (litres per property day)
Bristol	65.04
Essex and Suffolk	76.40
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.30
Affinity	108.65
South Staffs	113.45
Severn Trent	119.66
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	131.01
Thames	151.51
Welsh Water	158.80



The following chart shows what Anglian Water is proposing to do to improve things:

Water Quality Contacts

The following chart shows how Anglian Water are performing in the area of “**Water Quality Contacts**” (where a customer contacts them about the appearance, taste or smell of the water), against both their target and also the other water companies.

Appearance, taste and smell of tap water



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Number of customer contacts received regarding incidents, per 1,000 properties.
Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 8th out of 17 companies on this measure

Company	Performance (number of contacts)
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.10
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

Better performance

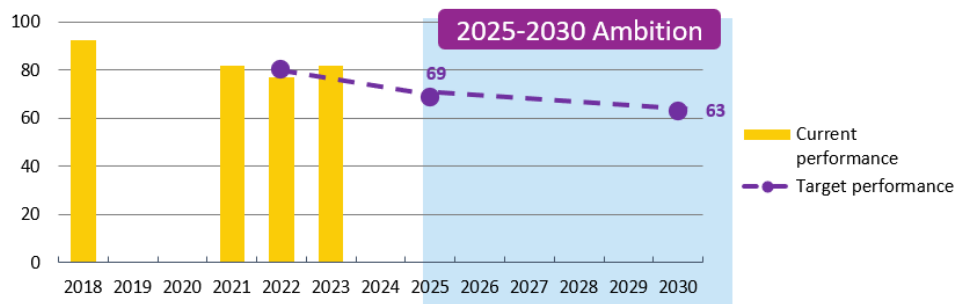


Worse performance

Reducing leaks



Targets for reducing the amount of water lost due to leaks from water mains and pipes.



Litres per property per day. (A lower number is better.)
Note: figures have been normalised by property

How:

Having been focused on tackling leaks on our network, in 2025-2030 we will concentrate on leaks from customer pipes identified by new smart meters.

Performance:

Leaks have reduced by 7% since 2018

The following chart shows what Anglian Water is proposing to do to improve thing

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

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

Internal Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “Internal Sewer Flooding”, against both their target and also the other water companies. Internal flooding means it enters a property.

Sewage flooding of properties



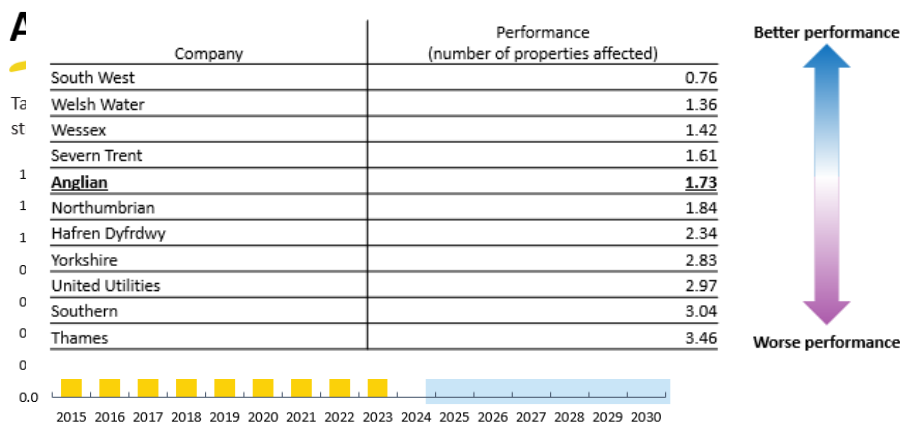
An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water has not met its target for this measure last year

Anglian Water are ranked 5th out of 11 companies on this measure



Number of customer contacts received regarding incidents, per 10,000 properties. (A lower number is better)

How:

Continue to flush water pipes to remove sediment and undertake planned preventative maintenance. Proactively contact customers about issues, so that they are reassured and don't need to contact us.

Performance:

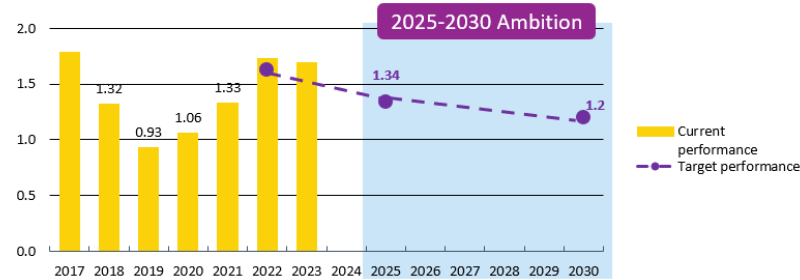
Contacts relating to water quality have reduced by 25% since 2015

The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



Number of properties affected, per 10,000. (A lower number is better)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of properties has reduced by 5% since 2017

External Sewer Flooding

The following chart shows how Anglian Water are performing in the area of “External Sewer Flooding”, against both their target and also the other water companies.

Sewage flooding of gardens or outbuildings



An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.

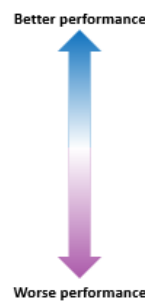
Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3rd out of 11 companies on this measure

Company	Performance (number of properties affected)
Thames	9.40
Severn Trent	10.80
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

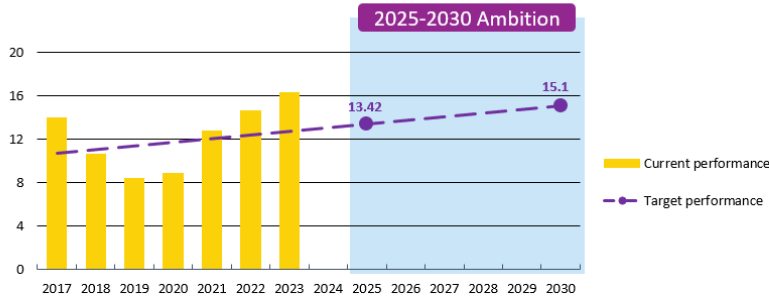


The following chart shows what Anglian Water is proposing to do to improve things:

Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



Number of properties affected, per 10,000. (A lower number is better.)

How:

Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes. Invest to increase the size of some sewers.

Performance:

Flooding of outbuildings has increased by 17% since 2017

Pollution Incidents

The following chart shows how Anglian Water are performing in the area of “Pollution Incidents”, against both their target and also the other water companies.

The following chart shows what Anglian Water is proposing to do to improve things:

Pollution incidents

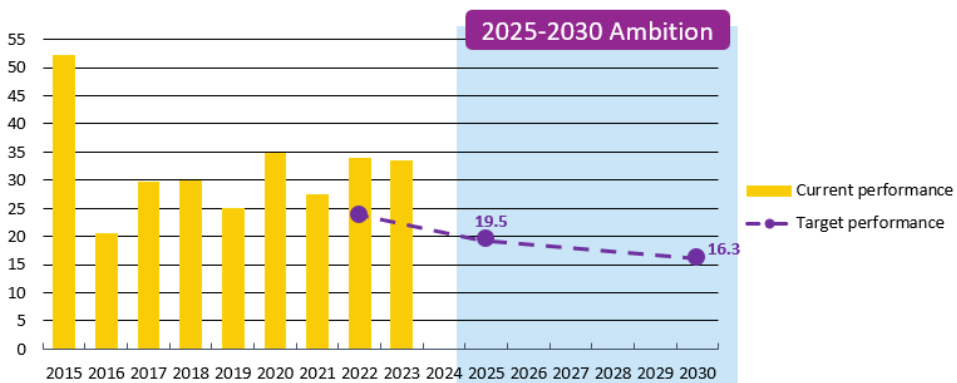


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Pollution incidents



Targets for reducing the number of incidents of pollution of rivers and streams.



Number of incidents per 10,000km of sewer. (A lower number is better.)

How:

Investing in better monitoring of pipes and treatment plants that cause the most serious pollution so that we get early warning and minimise impacts.

Performance:

Pollution has reduced by 36% since 2015

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

Please select one answer only

- Reducing sewer flooding **inside** properties
- Reducing sewer flooding **outside** properties
- Reducing the number of pollution incidents
- Don't know/can't say

The next section will show you six of the key areas of investment in Anglian Water's business plan before asking for your views on the plan as a whole.

Anglian Water proposes investing £3.946 billion in these six areas over the five years from 2025 to 2030.

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will improve drinking water quality.

Improving drinking water quality



£210m over five years to 2030
An average customer would pay a total of £226.73 extra on their bill over five years

- This investment is to make sure that all of our customers continue to receive high quality drinking water from their taps
- This requires additional development to ensure we can treat:
 - water at sites where nitrate levels are increasing (typically due to use in agriculture in the 20th century)
 - treatment of PFAS (or 'forever chemicals')

The next slide describes another of the additional components of Anglian Water's business plan relating to ensure their network of pipes are resilient to the impacts of climate change and for reaching net zero.

Climate resilience and net zero



£459m over five years to 2030

An average customer would pay a total of £488.91 extra on their bill over five years

- Invest in those assets which are most vulnerable to the effects of climate change
- This mostly relates to pipes which are located in soils which shrink and swell more in extreme weather, placing more pressure on these pipes
- This investment is to improve the ability of these pipes to withstand the impacts of climate change as these effects become more severe in future
- It is part of our longer term plan to protect all of the most vulnerable pipes by 2050 (around 16%) This investment will help to reduce carbon emissions from our operations and support us in doing our bit to help limit global warming
- Our aim is to have net zero emissions by 2030
- Whilst some measures (like improving energy efficiency and changing the source of our electricity to green energy sources) won't require additional investment, we will need to invest to reduce some of the more difficult emissions, like those which result from our water recycling operations

The next slide describes another of the additional components of Anglian Water's business plan relating to how they will ensure there is enough water for all in the future.

Balancing water supply and demand



£1.225bn over five years to 2030

An average customer would pay a total of £1,354.48 extra on their bill over five years

- This investment is to ensure we continue to provide enough water to meet the needs of customers in the Anglian region
- Climate change, population growth and environmental protections mean less water is available for an increasing population
- This includes:
 - investment to reduce the demand for water (e.g. through installing smart meters, reducing leakage and water efficiency measures), and
 - increasing the supply of water available (e.g. by building pipes which transfer water from areas of the Anglian region that have more water to those areas that have less)
- Developing two new reservoirs:
 - to make sure there is enough water available in the long-term as the population increases, and
 - to help ensure water is still available for everyone in the Anglian region even in severe drought periods
- This investment will go towards the early stages of developing these new major reservoirs (which will be built over the next 20 years)

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

Please select one answer only

- Improving drinking water quality
- Climate resilience and net zero
- Managing droughts and ensuring sufficient water for all

The following slide describes one of the additional components of Anglian Water's business plan relating to how Anglian Water will ensure their waste water network can manage the impact of growth in their supply area.

Managing the impact of Growth



£260m over five years to 2030

An average customer would pay a total of £308.17 extra on their bill over five years

- This investment will help us to ensure we can safely recycle waste water from the additional homes we expect to be built in the Anglian region
- This includes:
 - investment to expand our water recycling centres where used water is treated and returned to the environment, and
 - investment to reduce the risk of flooding
- This is part of a longer term plan to ensure services don't get worse in the future as a result of climate change and population growth

The next slide describes another of the additional components of Anglian Water's business plan relating to their environmental ambition.

Environmental ambition

£1.199bn over five years to 2030

An average customer would pay a total of £93.32 extra on their bill over five years



- Delivering our environmental obligations to the rivers in our region
- This includes reducing the concentration of nutrients in the water (like phosphates which can contribute to algae growth) to lower levels than ever before
- This is an increase in investment of over 30% compared with 2020-2025
- When used wastewater is treated at our water recycling centres the resulting products are:
 - treated water, which is returned to the environment; and
 - treated sludge, which farmers use in their agricultural practices reducing their demand for artificial fertilisers
- This investment will ensure we continue to have the capacity to manage and treat sludge at our sludge treatment centres as the population grows and to ensure that this sludge is safe to return to the environment

The next slide describes another of the additional components of Anglian Water's business plan relating to how they propose dealing with reducing spills from storm overflows.

Reducing spills

£593m over five years to 2030

An average customer would pay a total of £30.30 extra on their bill over five years



- This investment will help to ensure that those spills that prevent rivers achieving good ecological quality are eliminated by 2030
- We will reduce the number of spills from storm overflows at high priority sites (those with the highest environmental impact) by 45% and the overall number of spills from storm overflows by 16%
- We will reduce the average number of spills per overflow from 25 to 20 by 2025, and further reduce this to an average of 10 by 2050

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

Please select one answer only

- Reducing spills
- Environmental ambition
- Managing growth

Acceptability of Anglian Water's Proposed Business Plan

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you?

Please select one answer only

- Completely acceptable **Please go to Question Q25**
- Acceptable **Please go to Question Q25**
- Unacceptable **Please go to Question Q24**
- Completely unacceptable **Please go to Question Q24**
- Don't know/can't say

Answer if you selected "Unacceptable" or "Completely unacceptable" at question 23 (Q23 above)

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

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

Other 2, please specify

Don't know/ can't say

Answer if you selected "Acceptable" or "Completely acceptable" at question 23 (Q23 above)

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

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small

- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

- Other 2, please specify

- Don't know/ can't say

Long Term Plans

Long term investment (up to 2050) by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Delaying investment helps to keep bill increases affordable in the short term. But if it is delayed for too long, services could get worse in the future. Which one of the following options would you prefer?

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers. This would reduce the risk of services getting worse in the future.
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers. This helps to keep bill increases affordable in the short term.
- I don't know enough at the moment to give an answer

Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Please select one answer only

- Female
- Male
- I identify in another way
- Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

Please select one answer only

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q29**

- Student
- Prefer not to say

Answer if you have selected “retired” at question 28 (Q28 above)

Does the main income earner have a state pension, a private pension or both?

Please select one answer only

- State only
- Private only **Please go to Question Q30**
- Both **Please go to Question Q30**
- Prefer not to say

Answer if you have selected “private only” or “both” at question 29 (Q29 above)

How would you describe the main income earner’s occupation type before retirement?

Please select one answer only

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- None of these
- Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion.

Please select all that apply

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background

Please select one answer only

WHITE

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller

Any other White background

MIXED

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

ASIAN OR ASIAN BRITISH

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other Black background

OTHER ETHNIC GROUP

- Arab
- Any other ethnic group
- Prefer not to say

Which of the following bands does your household income fall into from all sources, before tax and other deductions?

Please select one answer only

- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here: <https://www.anglianwater.co.uk/account-and-bill/help-paying-your-water-bill/>

Thank you

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

APPENDIX G

Cognitive Report

Question	Comments	Action
General	<p>In general the survey was well received with participants stating the following about it:</p> <ul style="list-style-type: none"> • Was not too long • There was nothing that they couldn't understand • Quite interesting especially seeing what UU plan to do in the future • All broken down not just text • Good balance of words with images • Interesting comparing companies • Interesting and straight forward • Had enough multiple-choice options • Was not found to be too repetitive • The information from the business plans was new for many participants as they were unaware of certain elements • It's spot on in terms of length and content • It shows that there is room for improvement at UU, but also shows how they are planning to address these issues 	None required
	<p>A participant that worked with disabled people raised a concern about how accessible this survey is to people with disabilities – suggested having two versions of the survey one with more information and one more accessible</p>	This is not an option due to the nature of this survey
	<p>One participant was confused and didn't understand that not all customers will experience the disruptions and was particularly concerned about the unplanned interruption as they have never experienced an issue</p>	None required

	One participant was concerned that many from the general public will not read all the information and will just want to skip to the end of the survey to receive their reward	None required
Introduction (Questions 1-8a)	The questions in this section were seen as pretty straight forward, clear and most participants did not have any issues completing these sections. One participant remarked about this section that <i>"Sets out what's what and simple clear concise questions like how the data protection and all the items are spelled out"</i>	None required
	One participant clicked on all the links in this section and got confused by the MRS website as they thought it was meant to be the Accent website	
	One participant commented they liked the ability to return at a later stage to complete the survey	
	NHH participants had no issues with these questions	
Affordability (Questions 9-13)	These questions in this section were found to be standard questions, just general how are you doing questions. Participants had no issues answering them and have noted they were easy to understand and they were <i>"is what it is"</i> type of questions.	None required
	One participant suggested that this section intended to <i>"get you to think about the value for money for your water services"</i>	
	One participant liked that this section had enough options, good words used for the options <i>"it's easier to be honest when the options are actually meaningful"</i>	
	Some participants found it hard to thinking so far ahead as there are so many thing that can change in 7 years	None required – the question is asked as per guidance

<p>Q11 Thinking about your household's/ your organisation's financial situation over the next few years up to 2030, do you expect it to get</p>	<p>One participant was felt we may have people answering randomly as people are worried about inflation and that people may not be managing so well. they felt that things will get worse before they get better.</p> <p>One participant said it comes across as guessing how ambitious or pessimistic you are about the future. <i>"There are so many other factors going on e.g. Brexit and Ukraine that it feels very personal so ask how do you see your situation changing in a world filled with growing change"</i></p>	<p>None required</p>
<p>Q13.How easy or difficult is it for you your company/organisation to afford to pay your current water and sewerage bill?</p>	<p>One participant remarked they found this question very easy because they pay by direct debit. Did not consider the actual cost but rather the method of payment.</p>	<p>None required</p>
<p>Bill increase/inflation chart</p>	<p>The majority of participants were able to digest the information in the top half of the page and remarked that:</p> <ul style="list-style-type: none"> • The text was easy to read and they liked the split in bullet points and a short paragraph • The information was clear and understandable 	<p>None required</p>
	<p>Some participants took some time to read the information and remarked it was:</p> <ul style="list-style-type: none"> • More official looking • Being hit with a wall of text 	<p>None required</p>
	<p>One particular participant that had a pretty strong prescription struggled to read the text in italics, however he remarked that the font was big enough</p>	<p>Potentially change the text from Italics to underlined or bold</p>

	<p>The graph was well received and understood by participants.</p> <ul style="list-style-type: none"> The blue orange differentiation was highlighted by a number of participants (<i>“Liked how the use of colours distinguishes between the actual bill and how much in the increase is due to inflation”</i>) 	None required
	One participant questioned why does the bill in blue go down for the next period after and the bill is higher due to inflation – does this mean had we not had inflation the bill would have gone down?	None required
	One participant suggested adding a third colour (purple) to the graph to highlight how much of the new bill is going towards investment	None required- this is out of scope
	One participant mentioned making the combined figure a bit more prominent – perhaps bold it	Bold the combined figure
	One NHH participant mentioned that basically all this information is conjecture, it is an estimation not actual accurate information	None required
	One NHH participant remarked that no one plans bills that far in advance	
Q14 /Q15(affordability of proposed bills)	Participants found these questions clear and easy to understand	None required
	<p>Even though participants understood the questions some had difficulty picturing the future that far ahead.</p> <ul style="list-style-type: none"> “it is difficult to know what you are not doing as much of in order to pay for your bills (e.g. when eating out is the same as your bill)” “it’s hard to answer so far ahead as there are many things that can change “ NHH are worried about impacts to the industry that can affect future 	
	One participant suggested replicating the bill projection graph to the side to help answering the question	
Comparative Data (generally)	Generally the charts were understood. Some participants understood the charts straight away but some took looking through a couple to understand what they were looking at.	None required

	<ul style="list-style-type: none"> • Quite a few participants mentioned there is no need to compare UU to how other companies are doing • Some mentioned UU should just focus on itself 	None required
<p>One participant liked how on the chart UU's position and if they had or not had met their target is also written out in the boxes above</p>		
<ul style="list-style-type: none"> • Two participant mentioned they liked the red and green arrows and how they allowed them to place UU in the ranking • Two participants mentioned liking the leader board style of this chart 		
<p>3 participants mentioned that the performance figures were confusing</p> <ul style="list-style-type: none"> • Six digits in the interruptions slide was very confusing • 17.71 - participant had to look and focus a little to digest all the information in this slide • One participant suggested to use % instead of these figures <p>One participant mentioned that the instances where UU has not met its target are not highlighted enough</p>	<p>These slides are prescribed in terms of format (and the latest, most simple, format of the slides has been used)</p>	
<p>Several participants have mentioned having difficulty reading the data in the chart</p>	<p>Increase font size in final charts</p>	
<ul style="list-style-type: none"> • Two participant mentioned that the actual target is not shown in the chart. • One participant suggested adding a year on year target chart to accompany the images 	<p>None required – these slides are done in accordance with the guidance</p>	
<ul style="list-style-type: none"> • One participant added that when you first look at the list of names it is hard to tell whether it is companies or regions in the list. • One participant suggested to add a map of UU regions • Two participants have suggested to add more detailed regional information as it would add more relevance to the list of planned improvements 	<p>This is outside the scope of research. Something for UU to consider in their comms campaigns</p>	

Unplanned interruptions	The visual was found to be aesthetically pleasing and participants were generally able to understand this element of the business plan	None required
	A participant mentioned <i>"It's not clear how they get the average duration. It's like there are two metrics, one for more than three hours and one in minutes. It should say the average time per property in hours minutes and seconds if that's how it's measured"</i>	Potentially amend the subheading on the chart to make this clearer
	One participant got confused by an interrupted water supply as never experienced one and thought this was going to happen. <i>"Has this happened to other people? I think it should say at the top of lower graphic, 'If this has happened to you'"</i>	None required – this was not found to generally be an issue
	4 participants have mentioned not understanding or being confused by the clock infographic. Some mentioned the text would have been sufficient	Consider replace the clock with a different representation or alter shading in the image to make it clearer how this aligns with % improvement
	This slide was well received and the imagery has been found to be aligned to with the words are saying	None required
Leakage charts/slide	One participant suggested that the wiggly lines depicting the water were confusing and making the text hard to read and suggested having a straight line instead	None required – this is negated by the number of participants that have said the image really works and the wiggly lines represent waves in the water and how it makes it all clear
	Several participants have mentioned how well the image of the water aligns with the text message	
	The infographic was found to be informative <i>"Didn't realise it was leakage per property per day until reading the lower infographic"</i>	
	A number of participants have remarked how poorly UU are performing on this metric compared to other companies	None required

Water quality	This slide was generally well received and participants understood the message	None required
	One participant remarked that they did not know what is meant by innovative technology network	Potentially add an example in brackets if relevant
	One participant struggled to understand this slide, did not understand the figure of 1.79 contacts	None required – figures reported as per guidance
	One participant mentioned that one of the paragraphs is the same as on the previous slide so it makes it harder to understand how this translates to water quality and makes the plans harder to believe – participant mentioned adding more specific information	None required – this has not been found as an issue anywhere else and due to time redesign is not advised
Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants found answering this question straight forward and participants have chosen the answer based on what it is important to them	None required
	Some participants have spoken about actively putting past experiences (like recent water supply interruptions, leaks or text messages about the water supply) at the back of their minds to really think what is important to them	
Internal sewer flooding	The majority of participants found this information clear especially liking the format of the text with the bullet points and no use of jargon	None required
	A couple of participants found the colouring in green of the house on the right to represent the % change did not translate well for this slide	
	Two participant mentioned that the reduction from 2.98 to 2.06 does not seem like a massive improvement but 31% feels like a large amount	
	One participant mentioned adding information on accountability for these accidents	
	One participant was really surprised to see this information as did not realise it was such a widespread problem	

External sewer flooding	One participant mentioned that the image of the green house colouring did not translate well for this slide	None required
	One NHH participant observed that most businesses do not have a garden so this may not be relevant to them and that the two slides about flooding should be mentioned together	
	One participant wanted to have more information on accountability included in the slide	
Pollution	Participants found this slide to be one of the ones most easy to understand	None required
	One participant mentioned that pink may not be the best colour for pollution	
	One participant wanted to include a map of areas where it is safe to swim	
	One participant suggested that the language on this slide waters down the actual impact of pollution e.g. "can affect rivers..." should be replaced with something 'more accurate' like "it does affects rivers..."	UU to consider revising language
	One participant mentioned the text does not say that the pollution affects the sea as well so it should also include that	None required
Q23 Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants have found answering this question a bit harder than Q19 and would have liked to be able to select more than one option.	None required – question asked as per guidance
Smart metering	Participants had no issue with this slide all information was clear	None required
	One participant remarked that grey was a bit boring compared to the previous images so perhaps using a better colour for the background and the same for all the other slides in this section	

	One participant mentioned perhaps adding a picture of a real smart meter to replace the current image	
	One participant mentioned the note at the bottom left could be enlarged as they missed it the first time round	
	One participant mentioned this slide may be irrelevant to renters (as they do not have a choice over the installing of meters) and another one that lived at a property that cannot be metered	
Hosepipe bans	Information of this slide was found to be clear.	None required
	Some participants were surprised to see this as they found this does not really apply to the area they live in	
	One participant wanted a bit more information on what exactly UU are planning to do to reduce this risk	UU to consider adding more information
Carbon reduction	One participant said they found it hard to follow this slide as they don't know much about carbon	UU to consider changes
	One participant found this slide could have its terminology broken down further into more layman terms e.g. what are green gas emissions.	
	One participant mentioned there is too much text and the slide could use a bit more imagery	
	Two participants mentioned the background colour is a bit dull	
	One participant wanted more information on how UU will change their processes to achieve this reduction	
	One participant wanted to know what are UU moving to since they are moving away from fossil fuels?	

	One participant wanted to know more information about the tree planting campaign; they were aware of areas where trees planted under this initiative have caused issues	
Affordability support	This slide was found to be very informative as many were not aware of support offered from UU. Additionally, the slide was found to be clear and well laid out	None required
	One participant wanted more information on how this is going to be spread out among customers	None required- this is outside the scope of this research
	Some participants wanted more information on the qualification criteria for this support	
Q28. Based on what you have just read, which of these four parts of the business plan is the most important to you?	Question was found to clear and easy to answer.	None required
Q29. Based on everything you have seen and read about Anglian Water' proposed business plan, how acceptable or unacceptable is it to you?	One participant commented that at this point it would be good to include a note on the plans that would be put in place with some indication of level of spend to help decide	None required – question asked as per guidance
	One participant was confused if this question refers to all the elements of the business plan or just the last 4	None required – everyone else did not seem to have an issue
	One participant wanted the option to write in their own answer at this point	None required – question asked as per guidance
Q30. What are the two main reasons that you feel the proposals for your water services are unacceptable?	One participant wanted an option to say that shareholders and senior leadership are being paid too much	None required – question asked as per guidance and there is a “please specify” option
Q32 Long term investment by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?	Participants found it hard to answer this question as it poses a moral dilemma. Participants felt it is not fair for the future generations to pay for these improvements but at the same time they worry about their current financial wellbeing	None required
	One participant found this hard to answer as they felt this investment should have been started by now	None required

<p>Q37. Anglian Water offers help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:</p>	<p>This was generally acknowledged to be a great addition as everyone wanted to make sure people in need are supported, one participant even opened the link to review in their own time</p>	<p>None required</p>
<p>Demographics Q38-Q44a</p>	<p>One participant felt that this could be made to stand out a bit more and perhaps turned into an infographic like all the business plan slides</p> <ul style="list-style-type: none"> • Participants had no issues in understanding or completing these questions. • A couple have mentioned they liked the option to say “identify in a different way” at the gender question 	

