

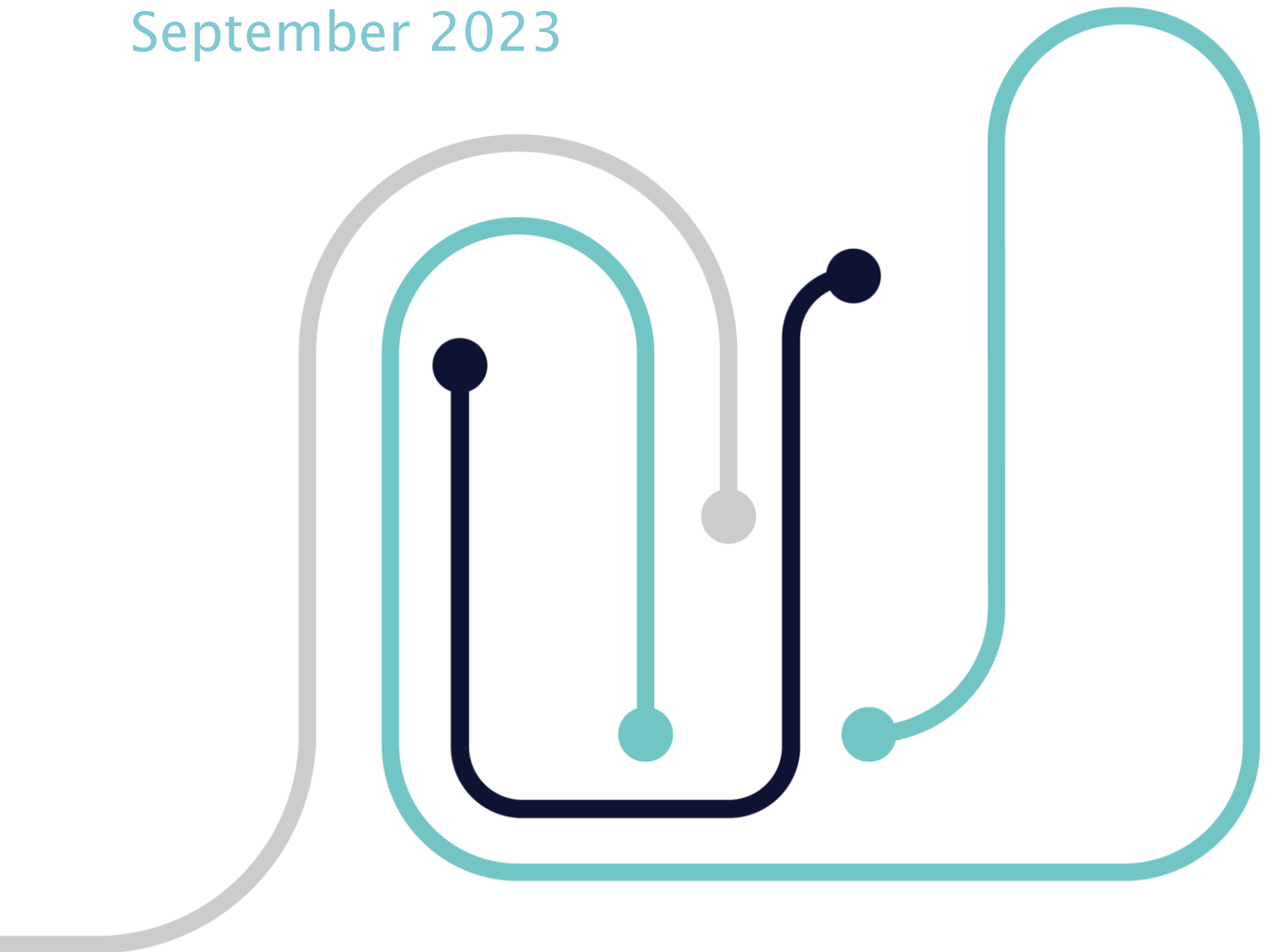


Anglian Water

Affordability & Acceptability Shadow Survey

Peer Review

September 2023



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Executive Summary

ES.1 Background and Objectives

The structure of Affordability & Acceptability Testing (A&AT) research for the PR24 Business Plan is being guided by Ofwat and comprises two parts – qualitative research largely using focus groups, followed by quantitative research via a survey. Anglian Water Services (AWS) completed the qualitative A&AT research in spring 2023 and are now carrying out the quantitative research phase.

Following the qualitative research, AWS completed an initial phase of quantitative research, known as the A&AT “light” survey, to capture customer views at an early stage to inform development of their business plan. Building on findings from the qualitative and the initial quantitative (‘light’ survey) stages of the research, cognitive testing, and previous AWS research, AWS wish to explore some alternative approaches to testing affordability and acceptability with customers. Therefore, to support and further explore the findings of the mandated A&AT survey, AWS is conducting a secondary shadow survey to run alongside the mandated survey.

AWS have engaged ICS Consulting to conduct a peer review of the shadow survey, including the research design and stimulus materials. The review is specifically focussed on the changes and additions that have been made to Ofwat’s mandated A&AT survey to create the shadow survey with the primary objective to identify any potential areas in which the shadow survey may be challenged and to provide recommendations for improvement.

ES.2 Approach

The review of the shadow survey has been guided by the regulator’s publications for PR24, including Ofwat’s ‘Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans’ and the principles for good customer engagement, set out in Ofwat’s ‘PR24 and beyond: Customer engagement policy – a position paper’.

The review concentrates on the shadow survey only, including the quantitative questionnaire and supporting stimulus. The shadow survey is based on the format of the mandatory survey, which has not been reviewed. It is assumed that the mandatory survey meets Ofwat’s standards for PR24 Affordability & Acceptability Testing.

Given the short timescales available, peer review of the shadow survey ran concurrently with the research design and development stages. The questionnaire and stimuli underwent several iterative stages, with review from ICS Consulting and cognitive interviews in between. Feedback was delivered to AWS and Accent, at a stage during the development period by means of detailed commentary on the materials and a tripartite workshop.

The review of AWS’s A&AT shadow survey primarily considered how it differs from Ofwat’s mandated questionnaire, the reasons behind the changes, and the effectiveness of the survey in the context of best practice for customer engagement. Our review considered what key research questions the shadow survey is testing, why they are being tested and what evidence exists to support those research questions.

ES.3 Key findings

The peer review has found that, overall, the shadow survey remains relatively close to Ofwat’s required survey.

The shadow survey has some structural changes, with the order of some sections or individual questions within a section altered. It also includes more information about AWS’s activities, challenges faced and work to support vulnerable customers to set the context for AWS’s plans and targets.

In our review we considered the suitability of these changes to the survey structure, and the additions to the survey in terms of information and materials, and additional questions. The initial review also highlighted a few key areas that may be open to challenge which have been addressed prior to survey launch.

SURVEY STRUCTURE

Given the research objective to test whether customers' views on the 'proposed changes to your water/sewerage bill' alter if customers understand what the plan will deliver in terms of the proposed performance targets and investment plans, we consider the change in section order to be reasonable.

We do note that, without the bill impacts of the proposed investments, customer views on the relative importance of the six performance targets or the investment areas may vary and recommend this is tested during analysis of the survey.

ADDITIONAL INFORMATION AND QUESTIONS

Following the amendments to the proposed text, we consider that the additional information included in the final version of the shadow survey provides customers with a wider view of AWS and the services provided and so supports AWS's research objective to understand if views change as customers understand the context. As the included materials are factual, we feel it fairly represents the approach taken by AWS in delivering their service.

A section on AWS's plans to extend financial support schemes is included in the shadow survey. We consider this section will aid understanding of customer support for this aspect of AWS's proposed business plan. However, it should be noted that informing customers of financial support schemes prior to sharing the proposed changes to water/sewerage bill for years 2025-2030 may influence customer views but there is no way of determining the specific impact of this aspect of the plan on views.

The additional questions regarding how AWS plan to address the challenges faced are included at the end of the survey prior to the section on longer-term plans to 2050. Given their position towards the end of the survey we do not expect any influence on the affordability and acceptability results.

HOW THE CHANGES ARE IMPLEMENTED

Survey Length

Although the shadow survey remains a lengthy survey, the questionnaire length has been significantly reduced during the review process. This represents a significant improvement that we consider should improve customer engagement and increase the quality of responses given later in the survey compared to the original draft.

Time pressures prevented testing of the revised survey with sufficiently large sample to confirm the average time to complete before fieldwork began, so it was recommended that the time taken to complete the launched survey be monitored and considered in reporting. In field the average survey length has been documented as slightly below the 20-minute estimate, which should preserve high quality engagement throughout.

Presentation of AWS in a favourable light

Overall, following the initial review, the shadow A&AT survey now uses more neutral language. Our recommendations to revise some questionnaire wording and stimuli to focus only on facts and figures to prevent the potential for presenting AWS in an overly favourable light have been implemented in most areas.

Accessibility

The final shadow survey is more accessible to customers in terms of the use of customer friendly language and the design of materials. Some changes have been made to remove technical language and high-level plans that lacked sufficient detail to allow customers to make an informed decision. Some of the materials have been simplified to improve focus.

ES.4 Our view of the shadow A&AT survey

Ofwat's Customer Engagement Policy for PR24 says that research should be useful and contextualised, neutrally designed, fit for purpose, inclusive, continual and ethical.

Our peer review of the shadow A&AT survey, taking into account the research objective to assess any difference in customer views when customers have a greater understanding of AWS's operations, customer support, and future plans has found the shadow survey to be:

Useful and contextualised

The survey remains close to the mandated survey but includes some additional information that informs customers of AWS's activities and support for vulnerable customers to provide wider context for their acceptability decision. We consider this is useful and in context.

The survey structure has been altered so that customers are aware of the performance targets and investment plans prior to making decisions regarding the acceptability of bill changes. We consider this structural change to the survey offers a useful opportunity to understand if customer views alter when they are aware of what the plan will deliver.

Neutrally designed

Most recommendations have been acted upon and we consider the changes to the survey compared to the mandated survey are largely neutral in design.

Fit for purpose

AWS's objective for the research is to explore how alternative approaches to testing affordability and acceptability with customers may influence customers' views. We consider the approach taken has minimised the number of changes and so is fit for purpose. It should allow AWS to identify if additional information and context impact customers' views and choices.

Inclusive

AWS has worked to ensure that the materials and survey are accessible using customer-friendly language and clear, simple design. This supports inclusivity.

Continual and ethical

The shadow survey forms part of AWS's overall A&AT research, part of their wider programme of customer research. It aligns with the mandated survey as far as possible and uses the same sampling and customer engagement approaches. As such it is considered consistent with their wider A&AT research programme and aligned to the Ofwat methodology and the MRS Code of Conduct.

1 Introduction

1.1 Background to the project

The structure of Affordability & Acceptability Testing (A&AT) research is being guided by Ofwat for PR24 and comprises two parts – qualitative research largely using focus groups, followed by quantitative research via a survey completed either online or by paper. Anglian Water Services (AWS) completed the qualitative A&AT research in spring 2023 and are now carrying out the quantitative research phase.

Following the qualitative research, AWS completed an initial phase of quantitative research, known as the A&AT “light” survey, to capture customer views at an early stage to inform development of their business plan. This additional research was based on the mandated Ofwat A&AT survey but only completed online.

Building on findings from the qualitative and the initial quantitative (‘light’ survey) stages of the research, cognitive testing, and previous AWS research, AWS wish to explore some alternative approaches to testing affordability and acceptability with customers. Therefore, to support and further explore the findings of the mandated A&AT survey, AWS is conducting a secondary shadow survey to run alongside the mandated survey.

The shadow survey is based on the mandated survey with some sections re-ordered, additional information about AWS’s purpose and role, plus a few additional questions to build understanding of customer views.

AWS have engaged ICS Consulting to conduct a peer review of the shadow survey, including the research design and stimulus materials. In the review, ICS has considered Ofwat’s principles for good customer engagement, alongside challenges from the ICG and feedback from cognitive interviews.

1.2 Project objectives

The peer review forms part of a wider A&AT assurance process to ensure AWS’s research programme is in keeping with the spirit of Ofwat’s guidance, and to ensure the delivery of high-quality, robust customer engagement.

This review is specifically focussed on the changes and additions that have been made to Ofwat’s mandated A&AT survey to create the shadow survey. ICS Consulting has therefore not commented on the mandated strategy or the sampling strategy and approach.

The primary objective of the review is to identify any potential areas in which the shadow survey may be challenged and to provide recommendations for improvement.

1.3 Report structure

This report presents the findings from the peer review of AWS’s shadow Affordability & Acceptability survey.

The report is structured as follows:

- Introduction (Section 1)
- Assurance Review Process (Section 2)
- Review Outcomes (Section 3)
- Conclusions (Section 4)

The report is supported by the following appendices:

- Appendix A: Shadow Survey Questionnaire
 - The version of the questionnaire (v3) and stimulus (v5) used for the initial review
- Appendix B: Key summary findings from the initial review

2 Peer Review Process

AWS has engaged ICS Consulting to conduct a peer review of its shadow Affordability & Acceptability Testing (A&AT) survey and stimulus.

2.1 Objectives

The objectives for the research were reviewed and agreed between ICS Consulting, AWS and their research partners, Accent during the project start-up meeting. It was agreed this review is specifically focussed on the changes and additions that have been made to Ofwat's mandated A&AT survey to create the shadow survey. ICS Consulting has therefore not commented on the:

- Mandated survey: the review assumes that the mandatory survey already adheres to Ofwat's standards. The only exception to this is the wording of some of the performance statements, which appear in both surveys.
- Sampling approach: ICS Consulting understands the shadow survey will use the same customer communication and sampling approach used for the main survey and will be carried out at the same time, removing any potential timing influence on the results.

The primary objective is to identify any areas where the shadow A&AT survey may be challenged. Whilst the shadow survey differs from Ofwat's mandated A&AT survey, its delivery should remain in-keeping with the spirit of Ofwat's guidance, whilst adhering to the regulator's principles for good customer engagement. The focus of the review is on the changes and additions that have been made to Ofwat's mandated A&AT survey.

A secondary objective is to make recommendations for improvement to the shadow survey to make it more robust or accessible to customers.

2.2 Approach

The review of the shadow survey has been guided by the regulator's publications for PR24, including Ofwat's 'Guidance for water companies: testing customers' views of the acceptability and affordability of PR24 business plans' and the principles for good customer engagement, set out in Ofwat's 'PR24 and beyond: Customer engagement policy – a position paper'.



Figure 2.1: Ofwat's guidance documents for PR24

Consideration was also given to Ofwat’s Customer Engagement Policy for PR24 which states research should be:

- Useful and contextualised
- Neutrally designed
- Fit for purpose
- Inclusive
- Continual
- Ethical

These principles have been considered throughout the review. Ofwat also indicates that company boards should provide assurance of quality customer engagement and that customers’ views have been included in business plans and long-term delivery strategies. It states that assurance should be:

- Independent
- Transparent
- Expert
- Comprehensive
- Have board ownership

ICS Consulting is an independent consultancy and Market Research Society (MRS) company partner with expertise in market research, economic regulation and strategic investment planning for utilities. The review draws on ICS’ expertise in customer engagement for regulated industries, as well guidance issued by the MRS.

The review concentrates on the shadow survey only, including the quantitative questionnaire and supporting stimulus. The shadow survey is based on the format of the mandatory survey, which has not been reviewed. It is assumed that the mandatory survey meets Ofwat’s standards for PR24 Affordability & Acceptability Testing, as outlined in the aforementioned Guidance for Water Companies.

Ofwat indicate that the quantitative A&AT research should test the affordability and acceptability of the proposed company plan with a representative sample of household billpayers, with an emphasis on affordability, plus a sample of non-household customers. For the purpose of this review, the sample design was out of scope.

2.3 Implementation

Given the short timescales available, peer review of the shadow survey ran concurrently with the research design and development stages.

The questionnaire and stimuli underwent several iterative stages, with review from ICS Consulting and cognitive interviews in between. Feedback was delivered to AWS and Accent, at a stage during the development period by means of detailed commentary on the materials and a tripartite workshop.

ICS’s initial review of the survey aimed to understand what key research questions the shadow survey is testing, and why they are being tested. Furthermore, the review aimed to understand what evidence exists to support those research questions, such as feedback from the earlier A&AT qualitative research, cognitive testing interviews or other previous research.

Table 1 details each step of the review process.

Table 1: Delivery timings

Date	Event	Details
31 st July 2023	Project start	<ul style="list-style-type: none"> Project start-up meeting (ICS, AWS and Accent) agree scope of review, project plan and approach.
1-8 th August	Survey and Materials development	<ul style="list-style-type: none"> Accent and AWS develop mandated and shadow survey, stimuli and complete COG interviews.
8 th /9 th August 2023	Materials received	<ul style="list-style-type: none"> Questionnaire v3 Stimulus v5 Feedback from ICG
10 th August 2023	Review meeting and written feedback	<ul style="list-style-type: none"> Tripartite review meeting (ICS, AWS and Accent) Verbal feedback (from Accent) on completed COG interviews for shadow survey ICS provide written feedback on questionnaire v3
19 th August 2023	Materials received	<ul style="list-style-type: none"> Questionnaire, launched version
21 st August 2023	Materials received	<ul style="list-style-type: none"> Shadow Survey Cognitive Interview Report Highlights
22 nd August 2023	Materials received	<ul style="list-style-type: none"> Stimulus v7
19 th – 31 st August	Further review of final survey and supporting evidence	<ul style="list-style-type: none"> Final survey, stimulus and Cognitive interview highlights reviewed. Review and assurance report drafted
4 th September	Draft report	<ul style="list-style-type: none"> Report issued by ICS Consulting for comment and review

3 Review Outcomes

3.1 Overview

The review of AWS's A&AT shadow survey primarily considered how it differs from Ofwat's mandated questionnaire, the reasons behind the changes, and the effectiveness of the survey in the context of best practice principles for customer engagement.

Overall, the shadow survey remains relatively close to mandated survey. Ofwat requires that the survey has two sections: affordability and acceptability. The former explores customers' household financial situation and the impact of proposed bills; the latter introduces the draft business plan, including a description of its benefits, ultimately asking customers how acceptable they find the plan to be.

Part of Ofwat's aim with their prescribed questionnaire is to capture how affordable customers find the proposed bill impacts in a way that gives a nuanced view that reaches beyond whether it is affordable or not. The shadow survey preserves the mandated questions to understand the potential impact of bill changes on quality of life.

The shadow survey has some structural changes, with the order of some sections or individual questions within a section altered. It also includes more information about AWS's activities, challenges faced and work to support vulnerable customers. In the mandated A&AT survey, customers are given specific information about performance and asked whether it is acceptable, without considering the wider context of all the services AWS provide and how AWS support customers in vulnerable circumstances. The new survey includes information on the services provided, together with information about vulnerability support in order to measure any difference in customer views when they have a greater understanding of AWS's operations and customer support.

It is understood that the reason for including much of the additional contextual information in the survey is in part due to feedback from the preceding A&AT qualitative research (although qualitative findings were not included in the review). Basing the quantitative survey on findings from the qualitative work is also one of Ofwat's requirements of A&AT work, so the shadow survey is considered a positive reaction to the guidance.

In our review of the adapted A&AT shadow survey we considered the suitability of changes to the survey structure, and the additions to the survey in terms of information and materials, and additional questions. The initial review also highlighted a few key areas that may be open to challenge:

- Survey length
- Presentation of AWS in a favourable light
- Accessibility:
 - Use of customer-friendly language
 - User experience on mobile devices
 - Design of materials

These specific areas were highlighted as part of the review and discussed during the tripartite review meeting. Key summary findings from the initial review are included in Appendix B. Whilst some feedback was resolved during the meeting, other aspects were addressed by further improvements to the survey prior to launch. Each of these areas, and the changes made to address them in the final survey, are explored in more detail in section 3.4.

3.2 Survey Structure

AWS's shadow survey has the structure:

- Affordability
- Additional information (About Anglian Water; Supporting Customers in vulnerable situations; Anglian Water's plans and the challenges faced)
- Anglian Water's proposed performance targets and plans
- Plans to support customers (additional to the shadow survey)
- Proposed changes to your water/sewerage bill for the years 2025-2030
- Acceptability of Anglian Water's Proposed Business Plan
- Long term plans to 2050

In contrast the mandated survey moves straight from 'Affordability' to the 'Proposed changes to your water/sewerage bill for the years 2025-2030' section before moving to 'Anglian Water's proposed performance targets and plans'. The mandated survey ends in the same way with the 'Acceptability of Anglian Water's Proposed Business Plan' section followed by 'Long term plans to 2050'.

We understand that the reasoning behind these structural changes is to test whether customers' views on the 'proposed changes to your water/sewerage bill' alter if customers understand what the plan will deliver in terms of the proposed performance targets and investment plans. On this basis we consider the change in section order to be reasonable.

We do note that, without the bill impacts of the proposed investments, customer views on the relative importance of the six performance targets or the investment areas may vary and recommend this is tested during analysis of the survey.

The cognitive interview highlights report states the researcher considered the survey appeared to flow well with fewer comments on how the questions were ordered. This supports the changes to survey structure.

Some minor re-ordering of questions in the Affordability section has been made. We consider it sensible to explore customer views on their current water bill before considering their views on their financial situation over the longer term to 2030.

3.3 Additional information and questions

The shadow survey includes additional background information setting the context for AWS's plan and targets, a section on AWS's plans to support vulnerable customers through financial support systems and some additional questions.

BACKGROUND INFORMATION

Additional information on Anglian Water in terms of the range of services offered and scale of operations has been included, as well as a summary of the support currently provided to customers who may struggle to pay their bills. There is also information summarising the challenges faced in the long-term such as growth and climate change.

We understand that the intention of these added sections is to set the context for the proposed investment plans and bill impacts. Subject to our specific feedback concerning the content (see section 3.4) we consider that the additional information provides customers with a wider view of AWS and the services provided and so supports AWS's research objective to understand if views change as customers understand the wider context.

We have considered whether the information provides undue influence. Whilst the cognitive interviews report that customers responded very positively to the information on financial support, saying it showed Anglian Water in a good light, as the included materials are factual, we feel it fairly represents the approach taken by AWS in delivering their service.

The additional questions within this section seek to understand the respondents' underlying knowledge which should help inform assessment of the potential influence of the additional background information.

PLANS TO SUPPORT CUSTOMERS

A section on AWS's plans to extend financial support schemes is included in the shadow survey.

We consider this section will aid understanding of customer support for this aspect of AWS's proposed business plan. However, it should be noted that informing customers of financial support schemes prior to sharing the proposed changes to water/sewerage bill for years 2025-2030 may influence customer views but there is no way of determining the specific impact of this aspect of the survey on customer views.

ADDITIONAL QUESTIONS

The additional questions regarding how AWS plan to address the challenges faced are included at the end of the survey prior to the section on longer-term plans to 2050.

We consider these additional questions lead the respondent into the long-term plan section and may provide insight into customers' views to help inform long term planning. Given their position towards the end of the survey we do not expect any influence on the affordability and acceptability results.

3.4 How the changes are implemented

SURVEY LENGTH

Whilst detail is required to convey complex concepts to customers, it is important to keep surveys shorter wherever possible. As survey length increases, engagement is likely to decline and the likelihood of drop-outs midway through the questionnaire increases.

During the feedback meeting (August 10th), Accent considered that the cognitive interviews indicated that the survey would be within 20 minutes, particularly when further changes to the survey were made following the review and feedback.

The original version of the shadow questionnaire (Questionnaire v3) supplied for review included 51 questions over 31 pages. This was reduced down to 47 questions over 26 pages following the initial review. The key changes were:

- Significant removal of additional explanatory wording,
- Removal of the section on high-level plans

Although the shadow survey remains a lengthy survey, this represents a significant improvement that we consider should improve customer engagement and increase the quality of responses given later in the survey compared to the original draft.

As part of the review process, we also appraised the cognitive testing highlights report which indicates that the survey length was found to be between 17-35 minutes. Individual response times were not reported, though it was noted that the customer who took 35 minutes to complete the survey was making notes during the exercise so may not have been an accurate representation. It is also unclear from the report what format the survey was tested in, online, paper or both.

That said, in field the questionnaire length of the shadow survey averages just under 20 minutes for the dual survey (19:02 minutes), within the anticipated survey length. The shadow surveys for Essex & Suffolk Water (16:22 minutes) and Hartlepool Water (16:15 minutes) are even shorter. This demonstrates a positive impact on survey length, also ensuring that the survey length is within the anticipated time for data collection given at the beginning of the survey, which is a requirement of the MRS Code of Conduct¹.

Below are some examples of changes to the questionnaire, where survey length has been reduced after the assurance review.

Example: Reducing Leaks

Original wording (Q15in questionnaire v3)

The next chart shows what Anglian Water's proposed targets for reducing leakage. It also shows Anglian Water's performance since 2018.

Revised wording (Q17 in launched questionnaire)

The next chart shows what Anglian Water's proposed targets for reducing leakage.

Example: Support for vulnerable customers

Original wording (Q13c in questionnaire v3)

Anglian Water offers support to customers who may struggle to pay their bills. Support is primarily targeted through their ExtraCare team to help customers budget for and pay their bills, including helping them to spread the cost of their bills over a manageable period. Anglian Water currently assists approximately 425,000 customers each year with budgeting support. This results in higher levels of bill payment and helps to reduce arrears and bad debt. Providing this support helps keep bills lower than they would otherwise be for all customers.

Direct bill support is provided to approximately 230,000 eligible customers through concessionary tariffs. Anglian Water also helps sign-post customers to additional state benefits and Third Sector organisations that may be able to assist them in accessing additional support.

Beyond affordability support, the Priority Services Register (PSR) helps a wide range of vulnerable people, from those with sight, hearing, or mobility difficulties, to expectant mothers. Anglian Water offer many different types of support through the PSR from sending bills in large print, Braille or audio format, to offering to read the meter for customers who find it challenging. If a customer is reliant on medical equipment at home, is an expectant mother or has a baby under 12 months old, Anglian Water contact these customers as a priority if the water supply is going to be interrupted.

Revised wording (Q13bb in launched questionnaire)

Anglian Water offers support to customers who may struggle to pay their bills. Support is primarily targeted through their ExtraCare team to help customers budget for and pay their bills, including helping them to spread the cost of their bills over a manageable period.

¹ MRS Code of Conduct 2023, Clause 30 H, p. 17 (<https://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf>)

PRESENTATION OF AWS IN A FAVOURABLE LIGHT

The first version of the shadow survey submitted for review included some additions which presented AWS in a favourable light, examples of which are detailed below.

Following a review of v3 of the questionnaire and v5 of the stimuli, ICS questioned the intention of changes from the mandated wording and the inclusion of additional information which may show AWS in a favourable light. During the tripartite review meeting, it was confirmed that the objective is to determine whether high level acceptability and affordability change if customers better understand the scale of AWS's activities and are aware of the level of support for vulnerable customers. This was highlighted during the preceding A&AT qualitative research.

To support this goal, it was recommended to revise some questionnaire wording and stimuli to focus only on facts and figures rather than any less tangible vision-related statements. This would increase respondent understanding and offer greater context of the wider services offered by Anglian without drifting into marketing-style text. This recommendation has been implemented in some areas of the questionnaire, as demonstrated below.

Overall, following the peer review, the shadow A&AT survey now includes more neutral language.

Performance statements

Throughout the review, the focus has been on how the shadow survey differs to the mandatory survey, on the assumption that the mandatory survey meets Ofwat's standards. The performance statements were adapted in the shadow survey to include some additional text regarding AWS's relative industry performance. Our initial review identified the new text as potentially introducing a positive bias, increasing the likelihood of the survey being challenged.

An example of a performance statement showcard prior to the review (Figure 3.1) includes the statement "Anglian is close to the best performer in the industry and has been for many years". This shows AWS in a positive light. However, respondents are also given AWS's performance in the comparative chart above, which in this case we considered did not align with the statement.

In the cognitive interviews, customers indicated that the comparative data and target charts were clear and easy to follow. They demonstrated a good understanding of the data. Two participants also mentioned that the statement about 'being close to the best' was not suitable and did not align with the performance data they were shown.

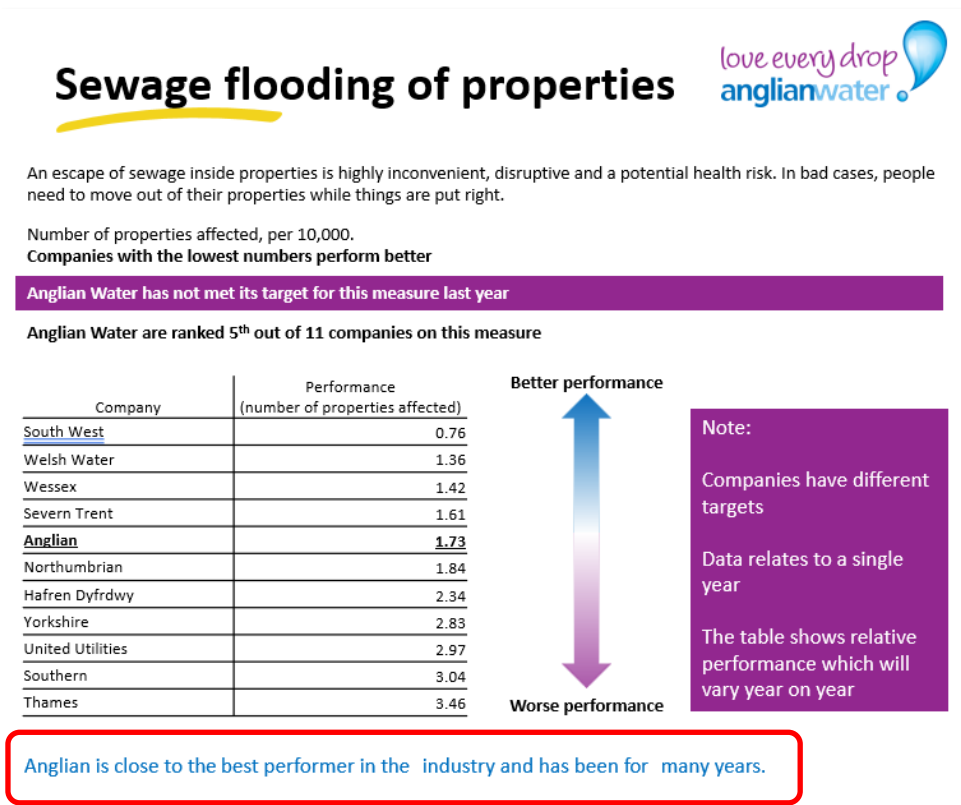


Figure 3.1: Sewage flooding of properties showcard - before review

Figure 3.2 shows the final post-review version of the performance statement showcard, which no longer includes this statement.

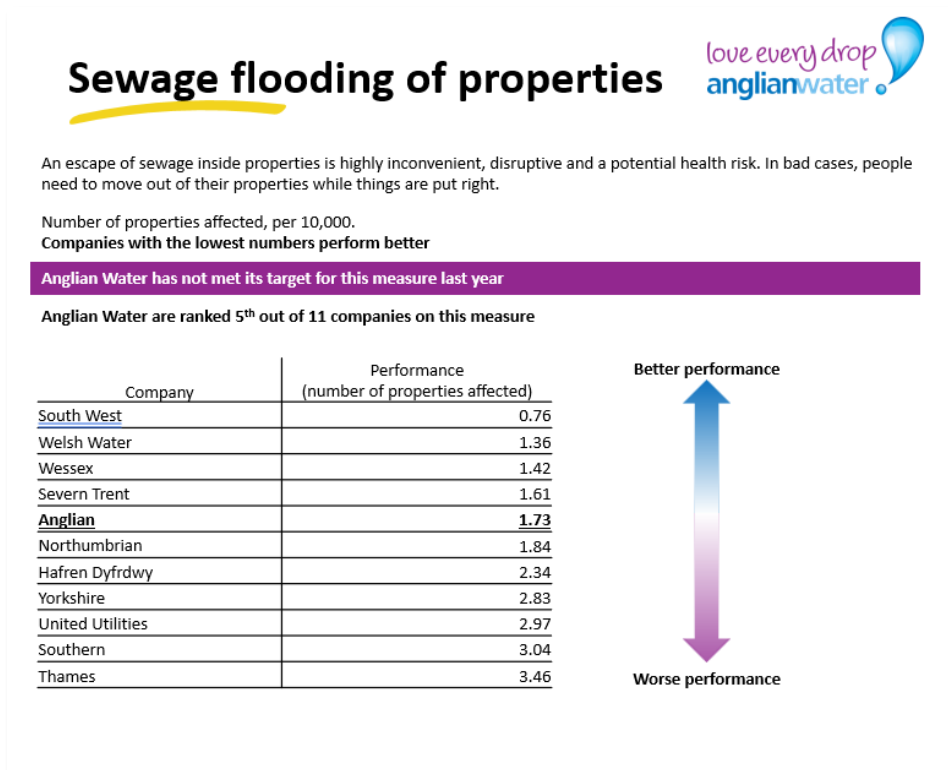


Figure 3.2: Sewage flooding of properties showcard - after review

AWS Awareness

The shadow survey introduced a new visual stimulus introducing AWS, explaining its role and activities to give participants a more tangible understanding of the scale of its work.

Figure 3.3 shows the original 'About Anglian Water' slide included in the stimulus prior to the review. It was recommended that the slide be updated to focus only on factual information, giving a more neutral representation of AWS. Specifically, the blue text box on the left may be at risk of challenge for being leading. The slide also contains a lot of information, so streamlining to improve ease-of-reading was recommended.

Figure 3.4 shows the version of this stimulus included in the final version of the survey, which is easier to read and presents a more neutral view of AWS.

About Anglian Water

Our purpose is to bring environmental and social prosperity to the region we serve through our commitment to **love every drop.**

We are geographically the **largest water and sewerage company** in England and Wales

Breadbasket of England – **highly agricultural area**

Serving **7 million** customers across the East of England and Hartlepool

We operate and maintain **38,006km** of water mains. Laid end to end, this is further than a trip to Sydney and back!

And we operate and maintain **76,355km** of sewers. Laid end to end this is almost twice around the earth's circumference

88% have a meter fitted

A household with a meter saves on average over £100 a year on their bill and uses up to **15% less water** than non-metered houses

We pump less water into supply every day now than we did in 1989, despite supplying **26% more properties**

Since privatisation in 1989, Anglian Water has invested **£20.6 billion** improving services in our region.

Figure 3.3: About Anglian Water - before review

About Anglian Water

We are geographically the **largest water and sewerage company** in England and Wales

Breadbasket of England – **highly agricultural area**

Serving **7 million** customers across the East of England and Hartlepool

We operate and maintain **38,006km** of water mains. Laid end to end, this is further than a trip to Sydney and back!

And we operate and maintain **76,355km** of sewers. Laid end to end this is almost twice around the earth's circumference

88% have a meter fitted

A household with a meter saves on average over £100 a year on their bill and uses up to **15% less water** than non-metered houses

We pump less water into supply every day now than we did in 1989, despite supplying **26% more properties**

Since privatisation in 1989, Anglian Water has invested **£20.6 billion** improving services in our region.

Figure 3.4: About Anglian Water - After Review

In addition, the wording on Q13b, around the About AWS slide has been shortened to enhance neutrality.

Example: About Anglian Water

Original wording (Q13b)

Anglian Water had the lowest increase in bills of any company since privatisation: its average bills have gone up just 4%, against an industry average of 20%.

Before this interview how familiar were you with Anglian Water and the services they offer?

Very familiar

Quite familiar

Not very familiar

Not at all familiar

Revised wording (Q13b)

Before this interview how familiar were you with Anglian Water and the services they offer?

Very familiar

Quite familiar

Not very familiar

Not at all familiar

ACCESSIBILITY

Use of customer-friendly language and concepts

One of Ofwat's requirements is ensuring that customer-appropriate language is used in research materials, to ensure regulatory concepts are not too complex to understand.

The shadow survey initially included new explanatory text to give customers more context, particularly more background regarding AWS's support of vulnerable customers.

During the cognitive interviews of the survey, some interviewees commented that the survey included clear wording and lacked jargon. Although there was a general consensus that the survey was 'wordy' it was also agreed that the level of detail was appropriate for the subject.

A new section and slide detailing AWS's high-level plans for 2025-2030 was included in the original version of the shadow survey (Figure 3.5). This was highlighted in the peer review as being potentially challenging for customers, as it introduces technical language which had not previously been introduced to customers, e.g., nutrients, water poverty and assets. Whilst bullet points achieve the simplicity needed for a short survey, statements such as "working with retailers and developers" may elicit further questions from customers about what is actually involved.

This section was also raised in the cognitive interviews. Although customers found the materials to be interesting and engaging, most participants felt the section was too high-level, making it difficult for customers to give an informed assessment of the acceptability of the plan. Concerned that customers unable to give a strong response might give an inaccurate picture of acceptability, this section was subsequently removed from the final survey.

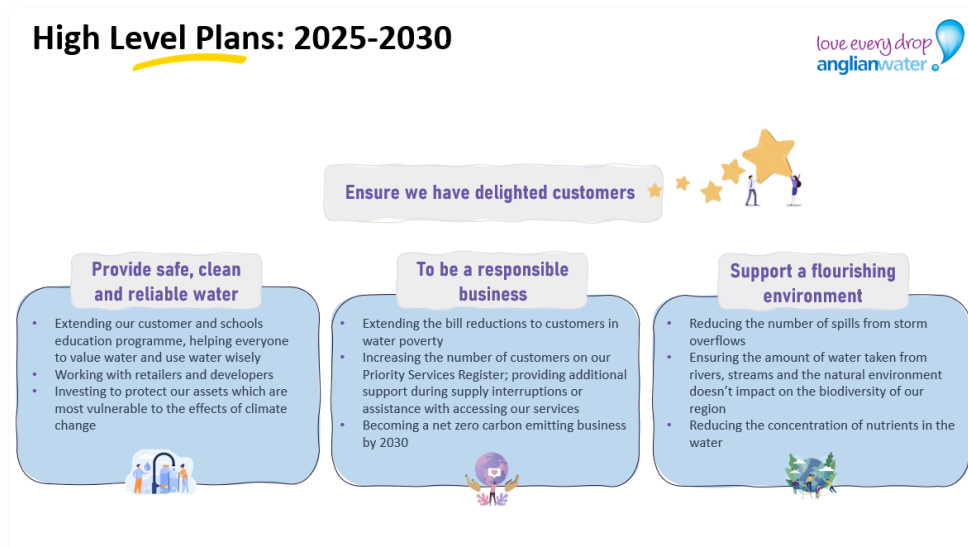


Figure 3.5: High Level Plans: 2025-2030

The long-term picture stimuli (Figure 3.6) was also challenged for including wording which may be confusing to customers. The slide includes terms such as abstracting, tidal surges, and fluvial flooding, which our research has indicated that customers may not be familiar with. No changes were made to this in the launched version of the survey.

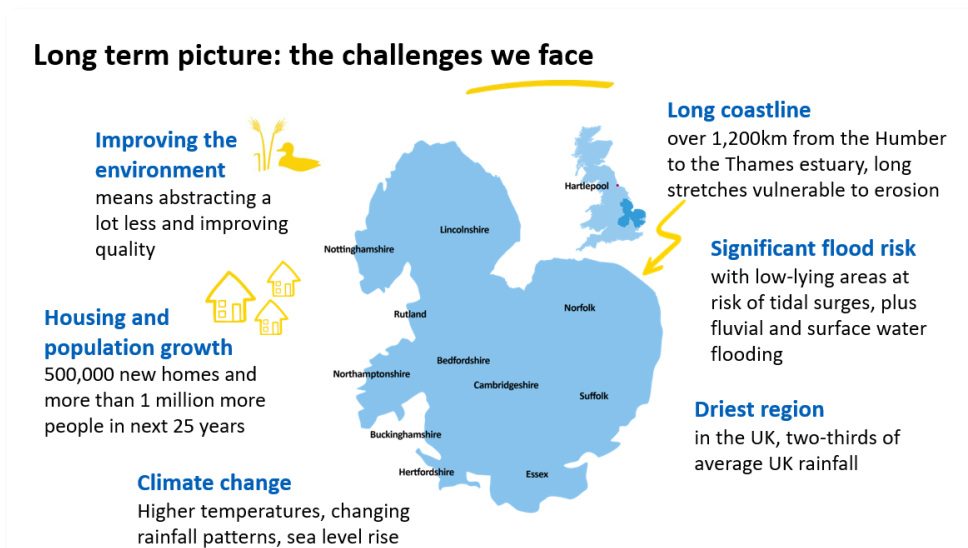


Figure 3.6: Long-term picture stimuli

User experience on mobile devices

The shadow survey is designed for completion in both online and paper formats, with the main emphasis on a push-to-web approach in line with Ofwat guidance. Throughout the survey, visual stimuli are shown in landscape format, e.g., Figure 3.7. The stimuli contain a lot of information to enable respondents to answer questions in an informed manner, as well as charts and imagery to support understanding.

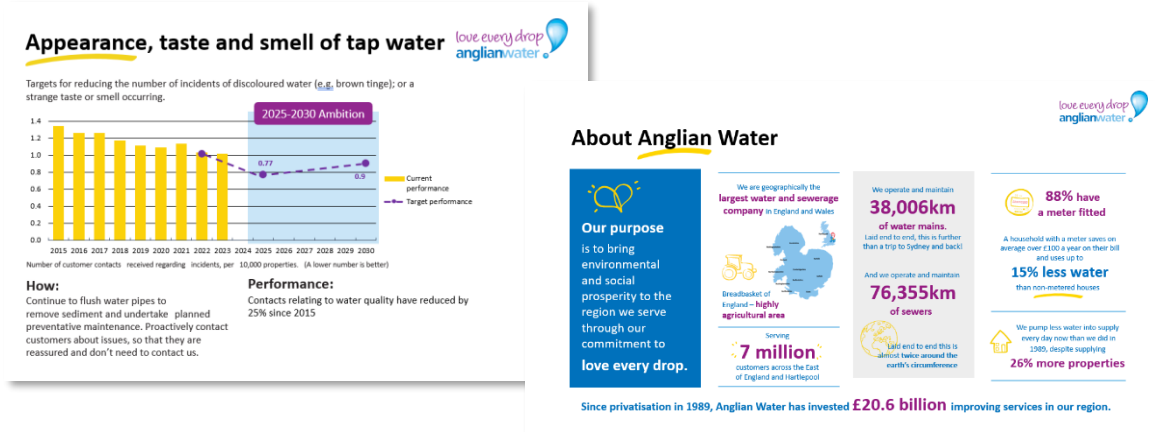


Figure 3.7: Examples of landscape stimuli

The latest annual Mobile Optimisation Research by the Market Research Society² shows that 47% of survey starts and completions are done on mobile devices. This indicates that a survey which is only user-friendly on full-screen laptops or desktops may not be suitable for a large proportion of users. The attrition rate between starts and completes is also worth considering; with users more likely to drop out midway through a survey if they find it challenging to complete on mobile.

The research also shows that females are more likely to use mobiles than males, and younger users are more likely to use mobiles than other users. Thus, if the survey is less accessible on mobile, it may skew the demographic of respondents and bias results.

The Market Research Society's Best Practice Guidance for mobile optimisation says to "ensure text size is easy to read on a mobile screen, including when text is overlaid on images and when delivered in portrait (vertical) and landscape (horizontal) positions"³. It also recommends that research should be adapted for multi-screen sizes.

Although landscape stimuli images are of concern in the format used in Figure 3.7, constraints are recognised in the need to remain consistent with the survey mandated by Ofwat. The presentation of data is consistent with Ofwat's guidance⁴.

Although not detailed within the Shadow Survey Cognitive Interview Report Highlights provided for review, it is understood that the cognitive interviews were conducted across a range of devices. Although these were mostly tablets and laptops, two cognitive interview participants completed the interview on their mobile devices. Feedback from the cognitive interviews indicates that the materials are all 'easy to read' and 'accessible'. In addition, researchers tested the survey on both Android and Apple mobile devices during its design, indicating that it is accessible for a range of users.

Design of materials

One of Ofwat's requirements for good customer engagement is having stimuli and materials that are clear and engaging. The comparable data presented aligns with Ofwat's guidance. It received positive feedback in the cognitive interviews, customers finding the charts clear and easy to follow.

² Market Research Society, *Mobile Optimisation Research 2022: Results* (<https://www.mrs.org.uk/resources/mobile-optimisation-research>)

³ MRS Report, *Mobile Adoption & Optimisation Best Practice Guidance*, February 2023 (https://www.mrs.org.uk/pdf/MRS_Report_mobileOP_o323v5.pdf)

⁴ Ofwat Guidance for water companies: Principles for setting out comparative company performance data, Nov 2022

The draft shadow survey included the addition of a note on the comparative data slides (Figure 3.8).

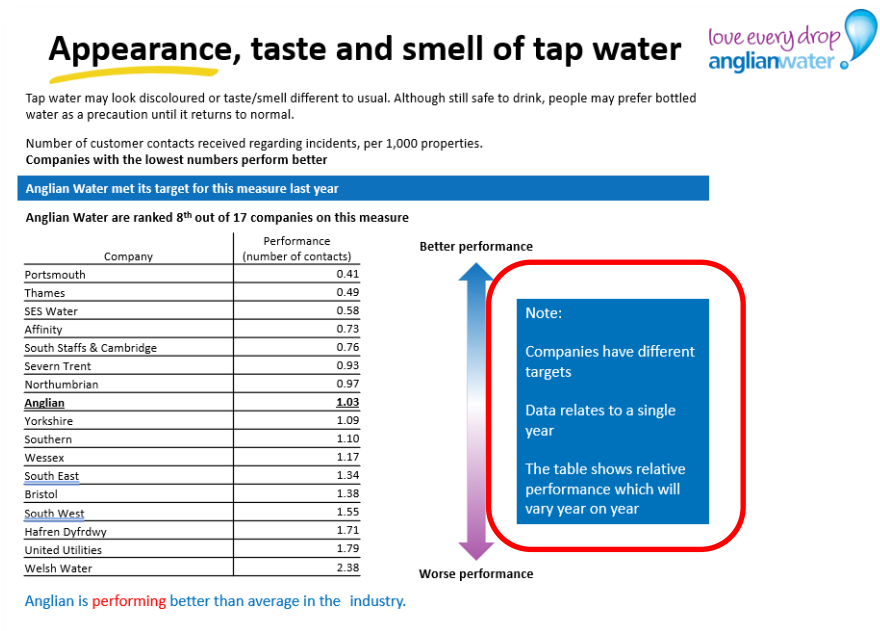


Figure 3.8: Appearance, taste and smell of tap water – prior to review

The review highlighted that, whilst information contained in the note may be useful, it would be better presented as footnote. The larger text and coloured text box dominates the view of the slide, and the wording regarding relative performance and targets may confuse less data-savvy customers. This is a potential area where the shadow survey could be challenged for accessibility.

The note was removed from the final survey (Figure 3.9).

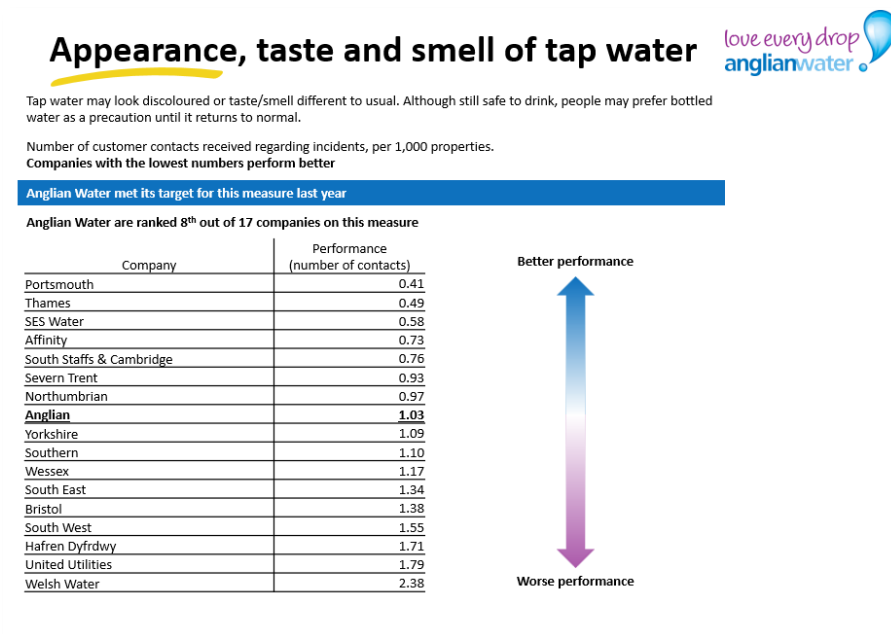


Figure 3.9: Appearance, taste and smell of tap water - after review

ICS and the ICG also questioned the accessibility of the map (Figure 3.10) early in the review process, however this was not updated in the final version of the survey.

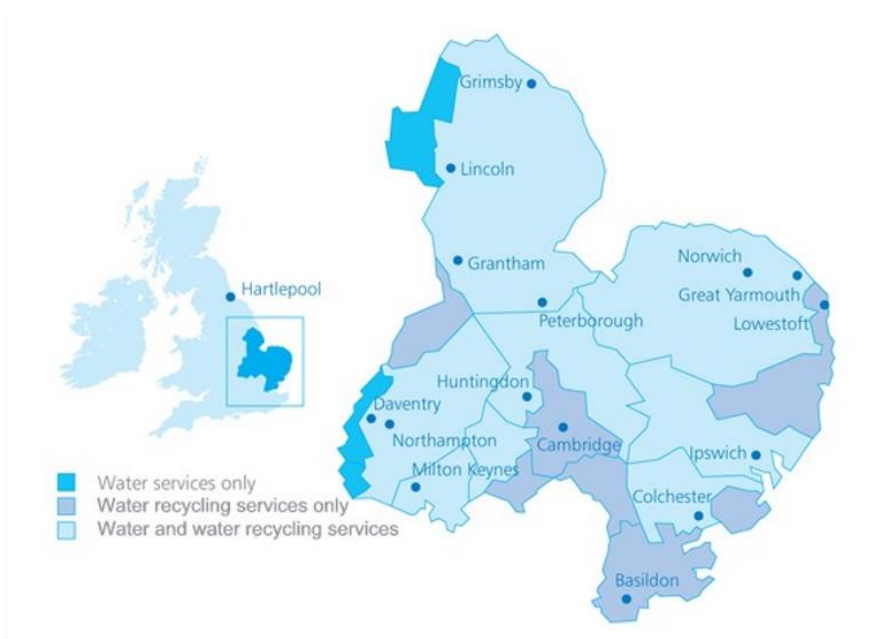


Figure 3.10: AWS map

4 Conclusions and recommendations

The review of AWS's A&AT shadow survey primarily considered how it differs from Ofwat's mandated questionnaire, the reasons behind the changes, and the effectiveness of the survey in the context of best practice for customer engagement. In the review, ICS has considered Ofwat's principles for good customer engagement, alongside challenges from the ICG and feedback from cognitive interviews.

The peer review has found that, overall, the shadow survey remains relatively close to Ofwat's required survey. The shadow survey has some structural changes, with the order of some sections or individual questions within a section altered. It also includes more information about AWS's activities, challenges faced and work to support vulnerable customers to set the context for AWS's plans and targets.

- It is understood that the reason for including much of the additional contextual information in the survey is in part due to feedback from the preceding A&AT qualitative research. Basing the quantitative survey on findings from the qualitative work is also one of Ofwat's requirements of A&AT work, so the shadow survey is considered a positive reaction to the guidance.
- In the mandated A&AT survey, customers are given specific information about performance and asked whether it is acceptable, without considering the context of wider services and how AWS already support customers in vulnerable circumstances. The new survey includes information on the wider services that AWS provide, which we consider reasonable to include provided it is factual and unlikely to have undue influence. This will allow AWS to assess any difference in customer views when they have a greater understanding of AWS's operations and customer support.

In our review of the adapted A&AT shadow survey we considered the suitability of changes to the survey structure, and the additions to the survey in terms of information and materials, and additional questions. The initial review also highlighted a few key areas that may be open to challenge which have been addressed prior to survey launch.

SURVEY STRUCTURE

Given the research objective to test whether customers' views on the 'proposed changes to your water/sewerage bill' alter if customers understand what the plan will deliver in terms of the proposed performance targets and investment plans, we consider the change in section order to be reasonable.

We do note that, without the bill impacts of the proposed investments, customer views on the relative importance of the six performance targets or the investment areas may vary and recommend this is tested during analysis of the survey.

ADDITIONAL INFORMATION AND QUESTIONS

Following the amendments to the proposed text, we consider that the additional information included in the final version of the shadow survey provides customers with a wider view of AWS and the services provided and so supports AWS's research objective to understand if views change as customers understand the context. As the included materials are factual, we feel it fairly represents the approach taken by AWS in delivering their service.

A section on AWS's plans to extend financial support schemes is included in the shadow survey. We consider this section will aid understanding of customer support for this aspect of AWS's proposed business plan. However, it should be noted that informing customers of financial support schemes prior to sharing the proposed changes to water/sewerage bill for years 2025-2030 may influence

customer views but there is no way of determining the specific impact of this aspect of the plan on views.

The additional questions regarding how AWS plan to address the challenges faced are included at the end of the survey prior to the section on longer-term plans to 2050. Given their position towards the end of the survey we do not expect any influence on the affordability and acceptability results.

HOW THE CHANGES ARE IMPLEMENTED

Survey Length

Although the shadow survey remains a lengthy survey, the questionnaire length has been significantly reduced during the review process. This represents a significant improvement that we consider should improve customer engagement and increase the quality of responses given later in the survey compared to the original draft.

Time pressures prevented testing of the revised survey with sufficiently large sample to confirm the average time to complete before fieldwork began, so it was recommended that the time taken to complete the launched survey be monitored and considered in reporting. In field the average survey length has been documented as slightly below the 20-minute estimate, which should preserve high quality engagement throughout.

Presentation of AWS in a favourable light

Overall, following the initial review, the shadow A&AT survey now uses more neutral language.

Our recommendations to revise some questionnaire wording and stimuli to focus only on facts and figures to prevent the potential for presenting AWS in an overly favourable light has been implemented in most areas of the questionnaire:

- The relative industry performance statements have been removed
- The 'About Anglian Water' stimulus no longer includes the purpose and has a clearer form, which is easier to read and presents a more neutral view of AWS.
- Wording on Q13b, around the 'About Anglian Water' slide has been shortened to enhance neutrality.

Accessibility

The final shadow survey is more accessible to customers in terms of the use of customer friendly language and the design of materials. Some changes have been made to remove technical language and high-level plans that lacked sufficient detail to allow customers to make an informed decision. Some of the materials have been simplified to improve focus.

OUR OVERALL VIEW OF THE SHADOW A&AT SURVEY

Ofwat's Customer Engagement Policy for PR24 say that research should be useful and contextualised, neutrally designed, fit for purpose, inclusive, continual and ethical.

Our peer review of the shadow A&AT survey, taking into account the research objective to assess any difference in customer views when customers have a greater understanding of AWS's operations, customer support, and future plans has found the shadow survey to be:

Useful and contextualised

The survey remains close to the mandated survey but includes some additional information that informs customers of AWS's activities and support for vulnerable customers to provide wider context for their acceptability decision. We consider this is useful and in context.

The survey structure has been altered so that customers are aware of the performance targets and investment plans prior to making decisions regarding the acceptability of bill changes. We consider this structural change to the survey offers a useful opportunity to understand if customer views alter when they are aware of what the plan will deliver.

Neutrally designed

Most recommendations have been acted upon and we consider the changes to the survey compared to the mandated survey are largely neutral in design.

Fit for purpose

AWS's objective for the research is to explore how alternative approaches to testing affordability and acceptability with customers may influence customers' views. We consider the approach taken has minimised the number of changes and so is fit for purpose. It should allow AWS to identify if additional information and context impact customers' views and choices.

Inclusive

AWS has worked to ensure that the materials and survey are accessible using customer-friendly language and clear, simple design. This supports inclusivity.

Continual and ethical

The shadow survey forms part of AWS's overall A&AT research, part of their wider programme of customer research. It aligns with the mandated survey as far as possible and uses the same sampling and customer engagement approaches. As such it is considered consistent with their wider A&AT research programme and aligned to the Ofwat methodology and the MRS Code of Conduct.

Appendix A: Shadow Survey Questionnaire & Stimuli

Below is the original shadow survey and stimulus provided for review on 9 September 2023. This includes v5 of the stimulus integrated into v3 of the questionnaire. This was supplied alongside the mandated survey (questionnaire v4 and stimulus v2) for comparison.

3601
AWS A&AT Quant Script: SHADOW Version - Dual

PROJECT MANAGER: [Click here for guidance on what to put in this section](#)

Pls tick methodology, and where applicable nominate “back checking questions” (AKA “BCQs”). These must include the demographic questions.

Online only	<input checked="" type="checkbox"/>		
CATI only	<input checked="" type="checkbox"/>	(DP: add QAX)	
CAPI/Tablet	<input type="checkbox"/>	(If yes PM Nominate 3*Backchecking Questions:)QAZ2 Paper showcard? Y <input type="checkbox"/> N <input type="checkbox"/>
CATI recruit for online/field	<input type="checkbox"/>	(PM pls. Nominate BCQs:)QAZ3
Field recruit for online/CATI	<input type="checkbox"/>	(PM pls. Nominate BCQs:)QAZ1
Recruit only (ie for qual)	<input type="checkbox"/>		



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?

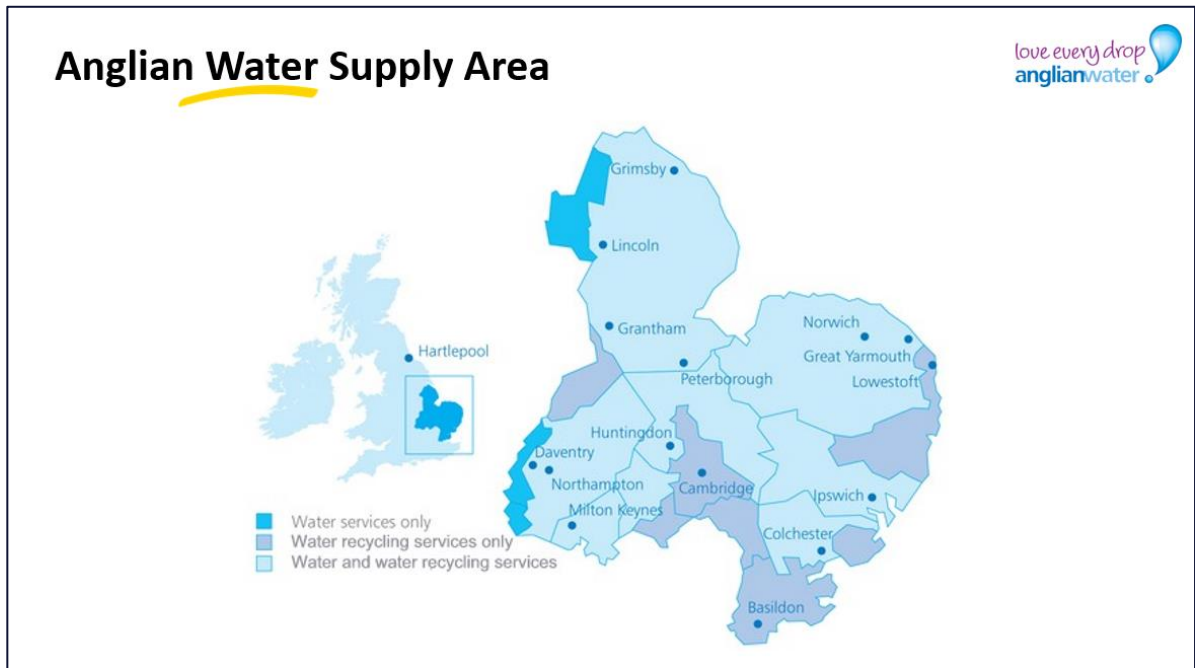
Yes **GO TO MAIN QUESTIONNAIRE**

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**

Q1. **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.



0 **THANK AND CLOSE**
 1
 2 or more
 Don't know **THANK AND CLOSE**

Q8A **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**

CATILINK . **IF NHH:** During the interview we'll show you 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 sewage 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**

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 are now going to ask you some questions 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

Q12. **IF NHH:** How much are you currently paying Anglian Water for your water and/or sewerage services bill, **each year?**

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

- Don't know
- A

Q13. How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and/or 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

Q11. 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

About Anglian Water

Q13b. Please take a look at the following information about Anglian Water.

DP – USE SLIDE 2

About Anglian Water

We are geographically the **largest water and sewerage company** in England and Wales

Breadbasket of England – **highly agricultural area**

Serving **7 million** customers across the East of England and Hartlepool

We operate and maintain **38,006km** of water mains. Laid end to end, this is further than a trip to Sydney and back!

And we operate and maintain **76,355km** of sewers. Laid end to end this is almost **twice around the earth's circumference**

88% have a meter fitted

A household with a meter saves on average over £100 a year on their bill and uses up to **15% less water** than non-metered houses

We pump less water into supply every day now than we did in 1989, despite supplying **26% more properties**

Since privatisation in 1989, Anglian Water has invested £20.6 billion improving services in our region.

Before this interview how familiar were you with Anglian Water and the services they offer?

- Very familiar
- Quite familiar
- Not very familiar
- Not at all familiar

DP PROGRAMME MINIMUM TIME LIMIT OF 5 SECONDS

Supporting Customers in Vulnerable Situations

Q13bb Anglian Water offers support to customers who may struggle to pay their bills. Support is primarily targeted through their ExtraCare team to help customers budget for and pay their bills, including helping them to spread the cost of their bills over a manageable period.

DP – USE SLIDE 3

Supporting customers

love every drop
anglianwater

Range of tariffs	Temporary instalment plans	Payment breaks	Back on track schemes	Assistance fund
------------------	----------------------------	----------------	-----------------------	-----------------

LITE
Extra LITE

WaterSure
AquaCare Plus

£135 million of direct support provided this year with plans to go further in the future.

bsi Inclusive Service KITEMARK™
Make Today Great

The Anglian Water Extra Care team help customers who may struggle to pay their bills. In 2023 we aim to help over 390,000 directly billed customers access support they're eligible for. The team also sign-post customers to additional state benefits and Third Sector organisations that may be able to assist them.

DP PROGRAMME MINIMUM TIME LIMIT OF 3 SECONDS

How familiar are you with the services that Anglian Water provides for customer who might need extra support?

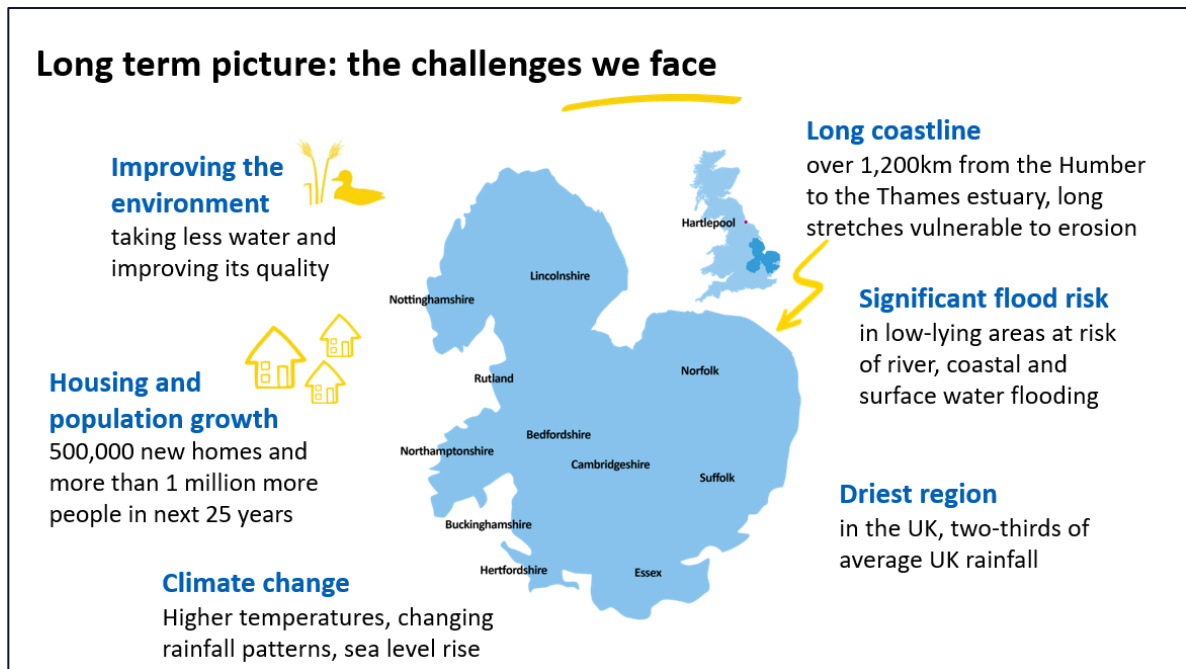
- Very familiar
- Quite familiar
- Not very familiar
- Not at all familiar

Anglian Water’s Plans

Q13c. Every five years water companies are required to put together a business plan which sets out their proposals for the investments they are planning to make. Today we’d like to understand your views on the plan Anglian Water is proposing for the five years from 2025 to 2030. We can’t show you all of the plan (it’s hundreds of pages!) but we will show you the areas that others customers have said are important to them.

In putting together their plan Anglian Water have considered the challenges faced in the areas they supply:

DP USE SLIDE 4



DP PROGRAMME MINIMUM TIME LIMIT OF 4 SECONDSA

Anglian Water's Proposed Performance Targets

We are now going to ask your views on some specific elements of Anglian Water's business plan.

Water company performance is monitored across a number of areas to ensure they deliver against their agreed targets. We are now going to show you Anglian Water's plans in six areas, starting with three that relate to 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

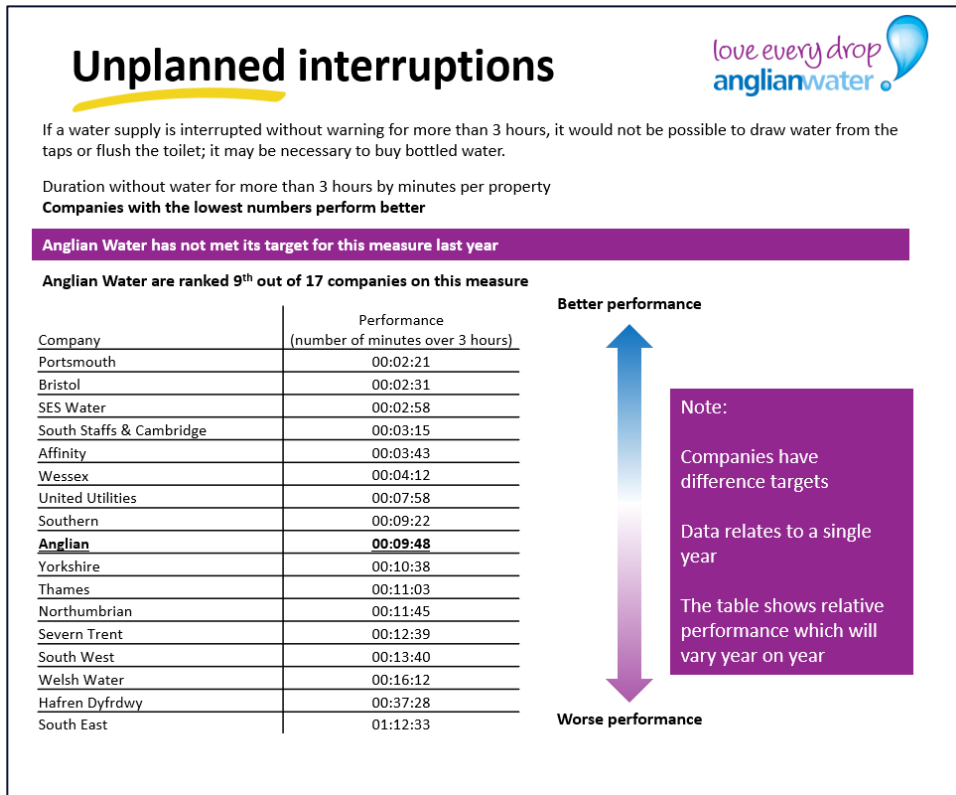
For each performance commitment we will show you 2 slides:

- The first shows Anglian Water's current performance against other water and waste water companies in England and Wales. This will also indicate whether Anglian Water met their target for that year. Note that water companies can have different targets, the data relates to a single year, and relative performance will change year on year.
- The second sets out Anglian Water's proposed target for their performance by 2030. To give you some context this chart also shows Anglian Water's historic performance, against their targets.

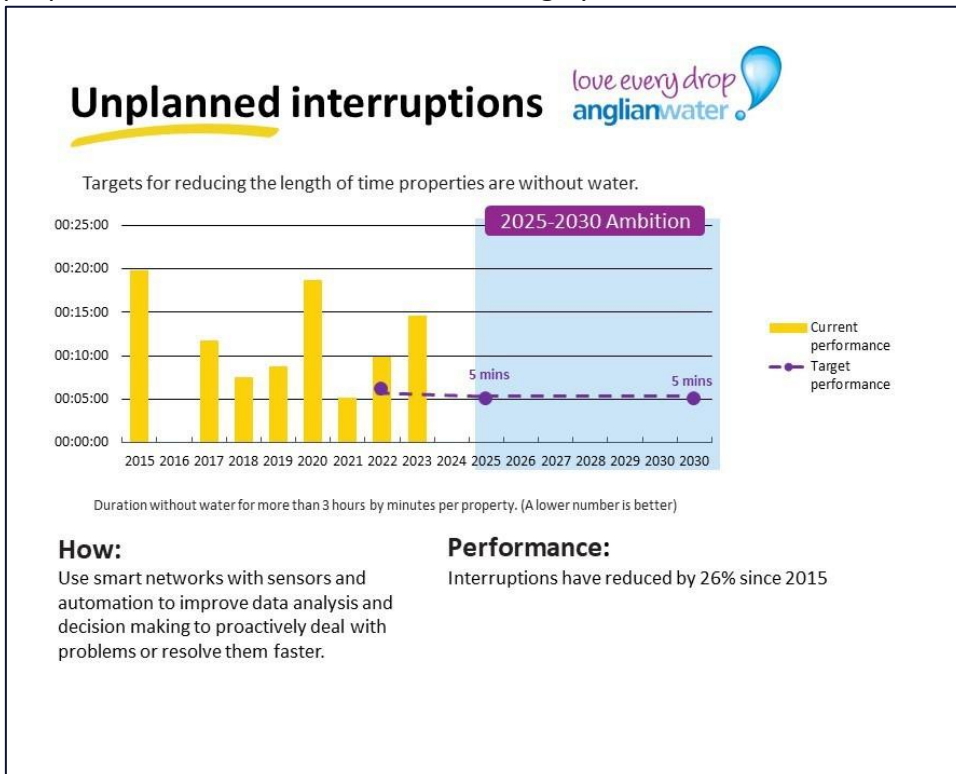
Q16. Unplanned Water Supply Interruptions.

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 & 7



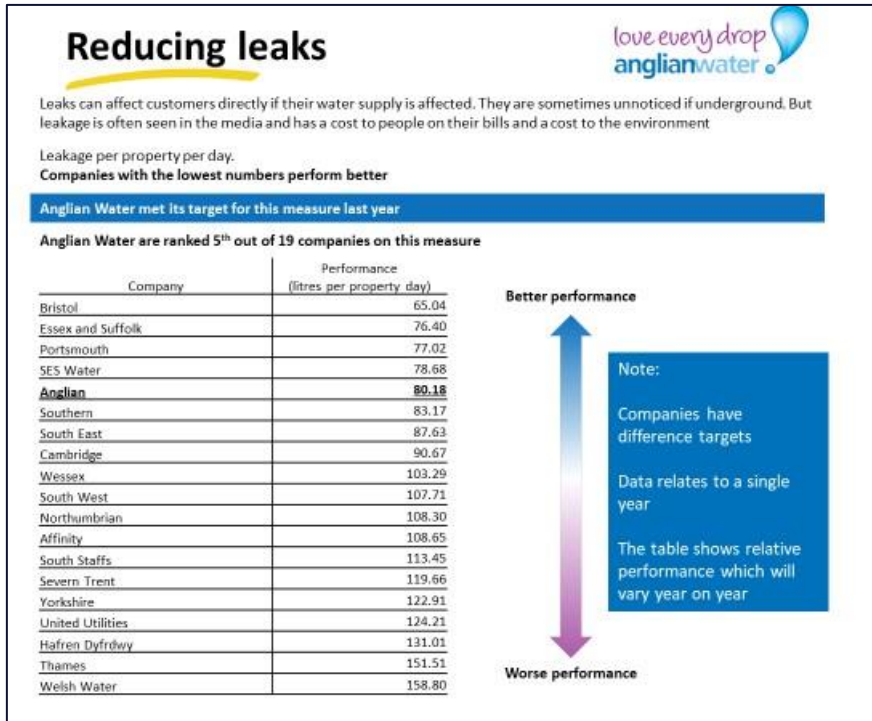
The next chart shows Anglian Water's proposed targets for reducing the length of time properties are without water on an average year.



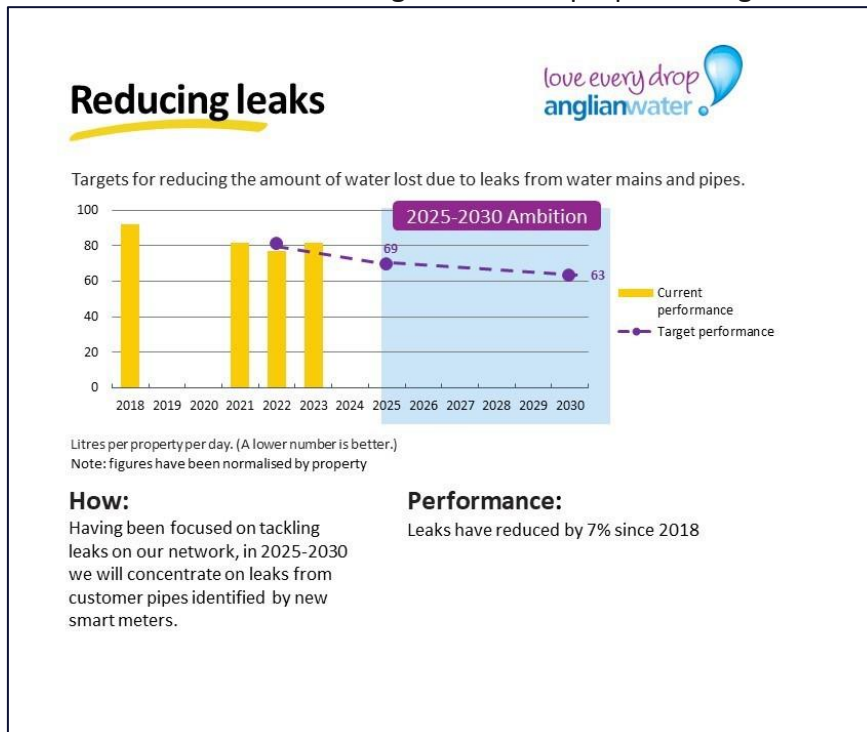
Q17. Reducing Leaks

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 & 9



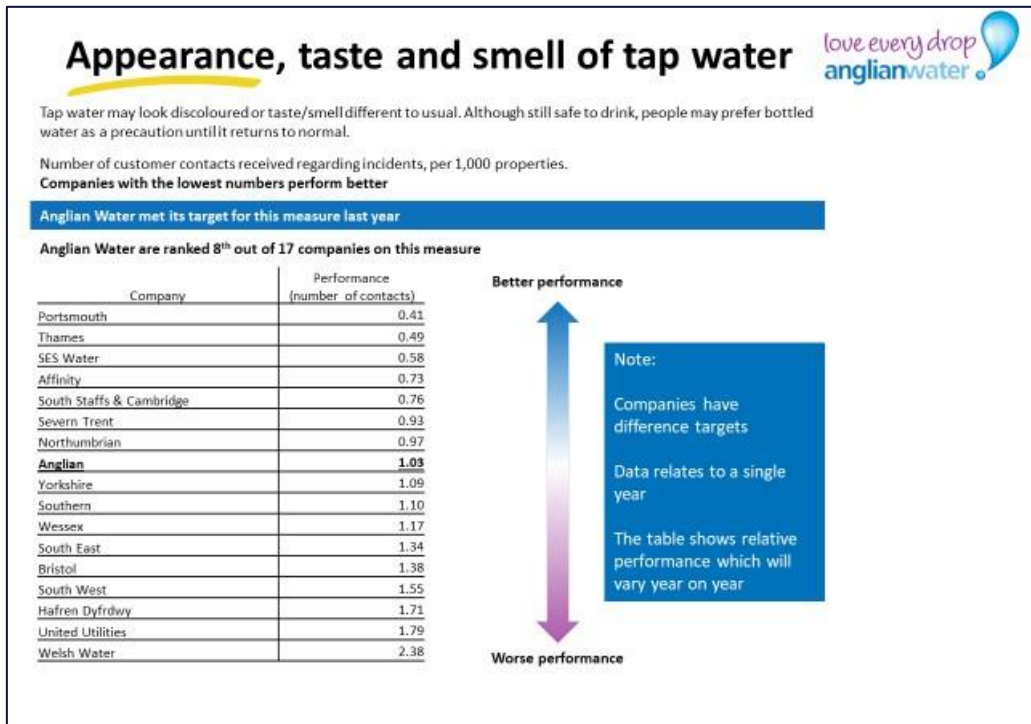
The next chart shows what Anglian Water’s proposed targets for reducing leakage.



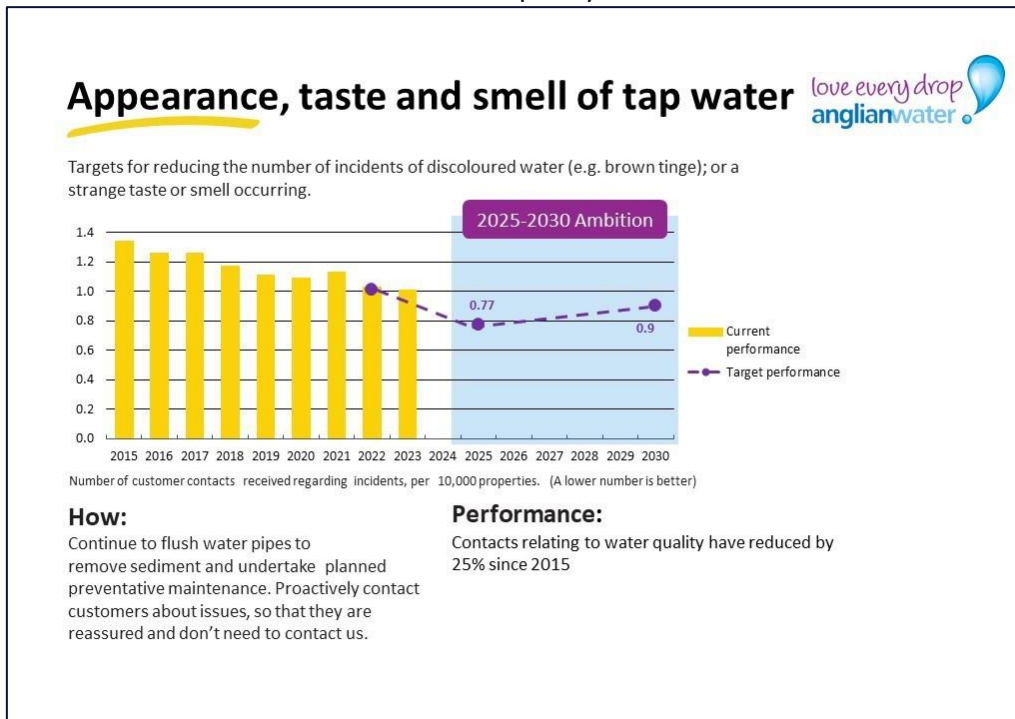
Q18. Water Quality Contacts

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 & 11



The next chart shows Anglian Water's proposed targets for reducing the number of customer contacts in relation to water quality.



Q19. 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**

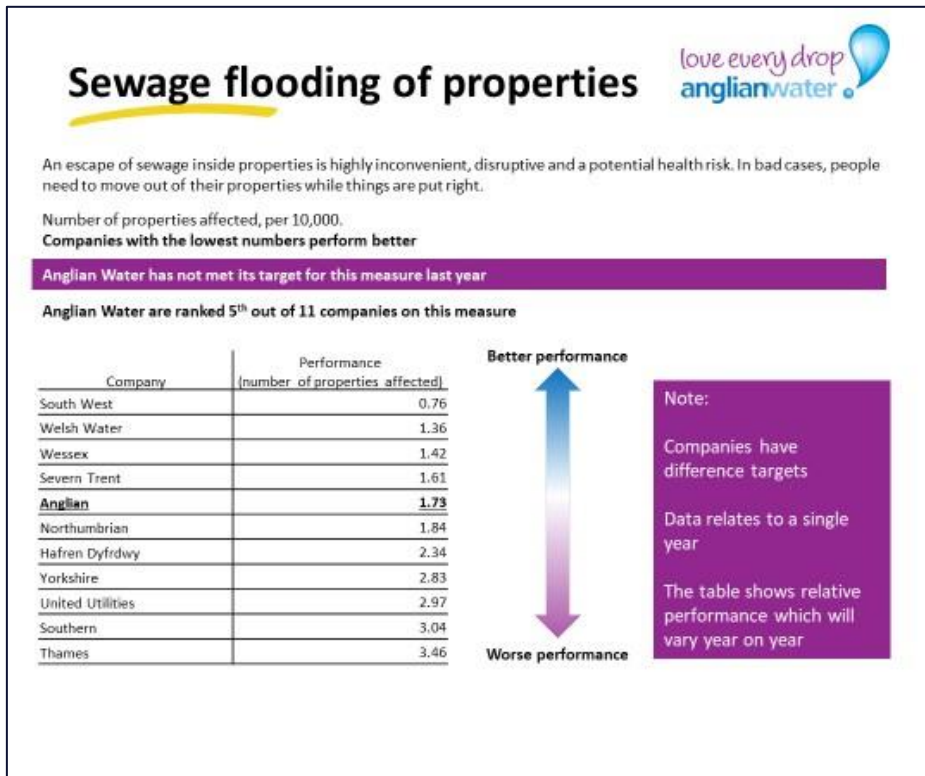
Please select one answer only

- 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

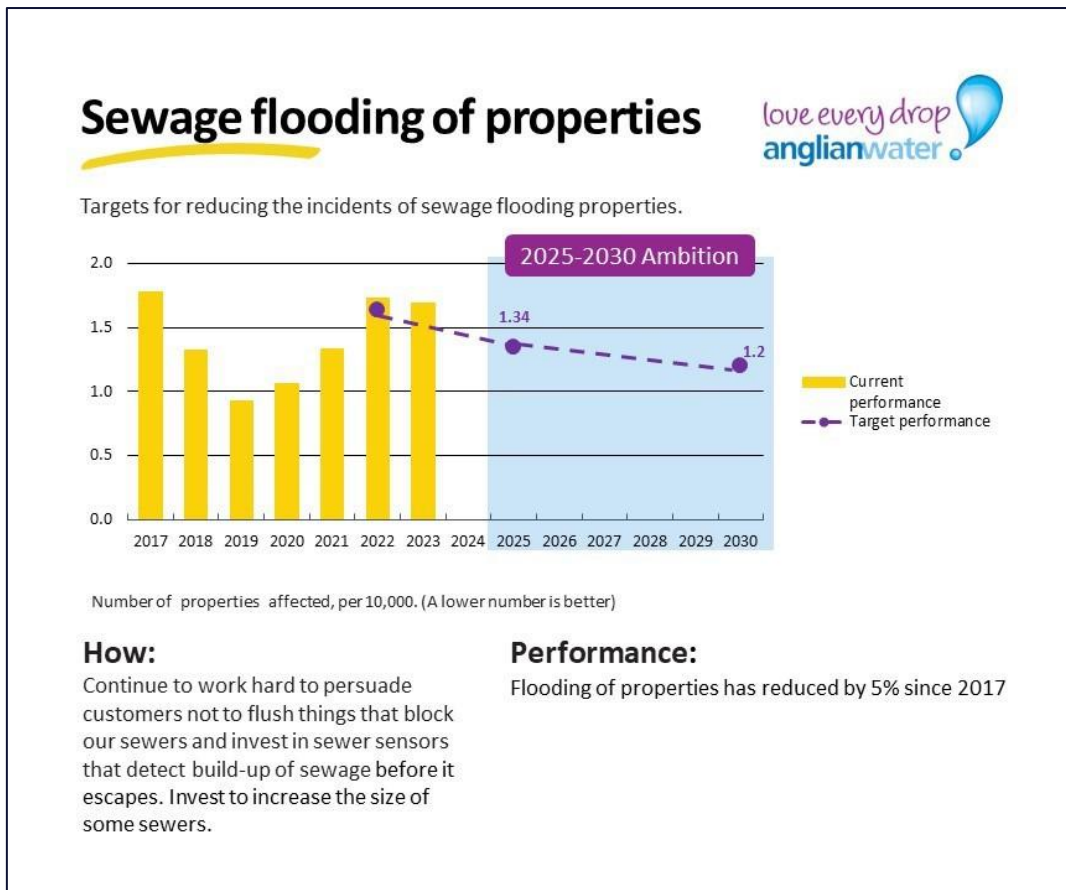
Q20. Internal Sewer Flooding

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.

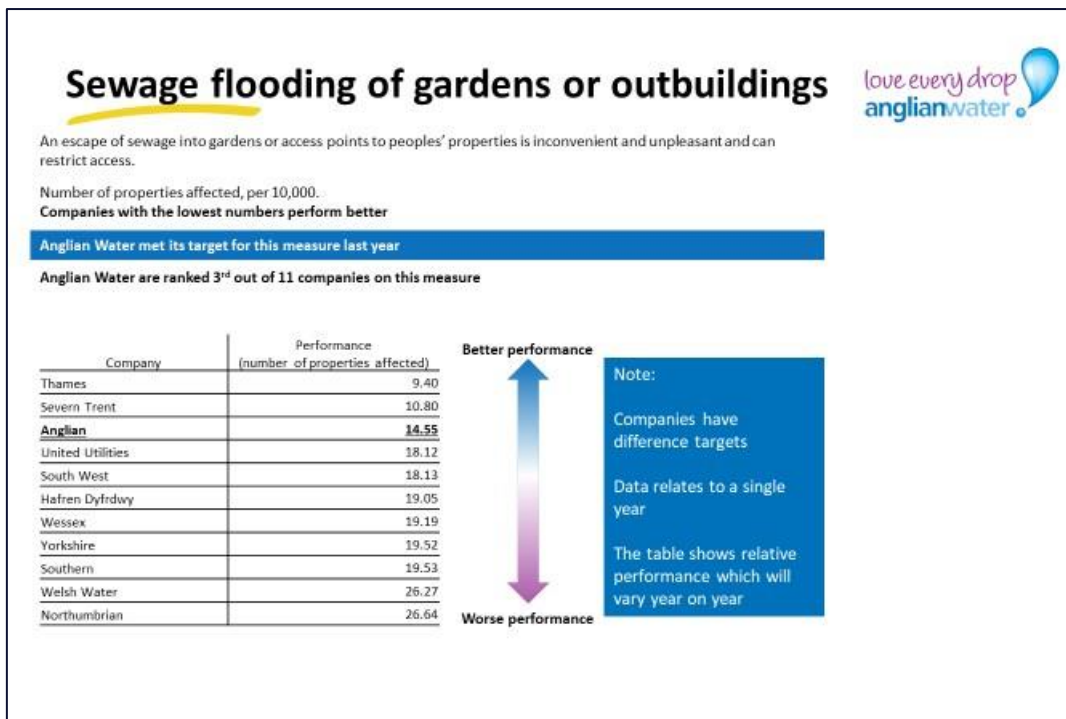
DP – USE SLIDES 12&13



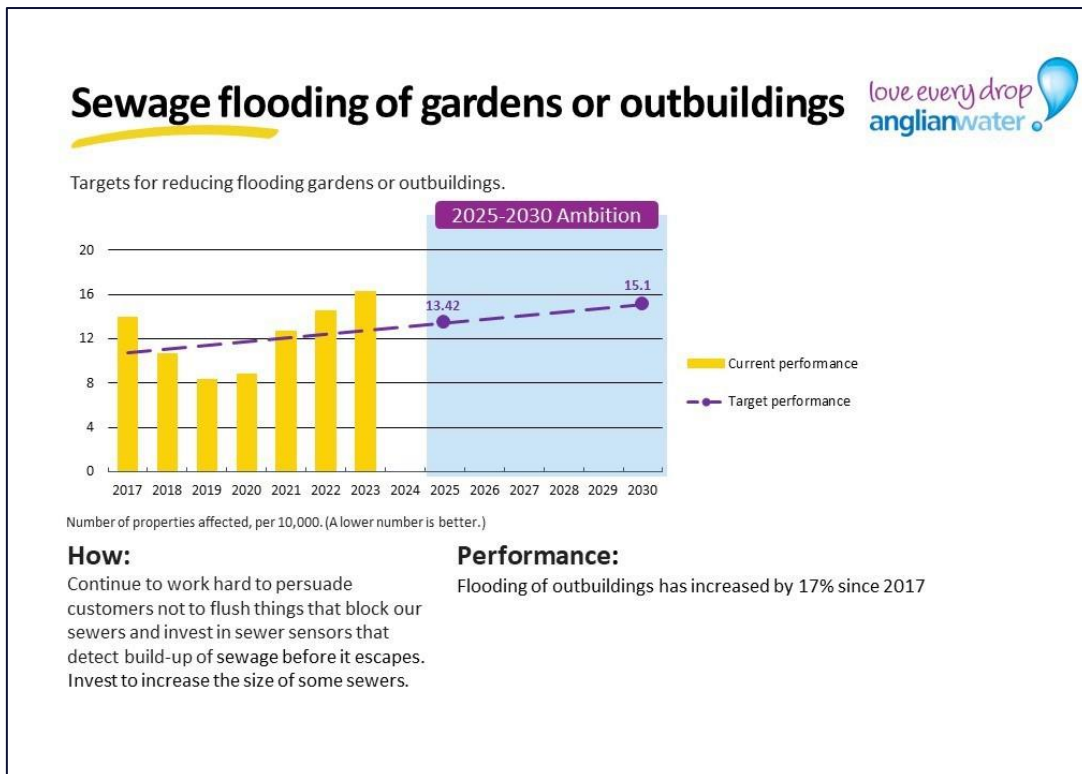
The next chart shows Anglian Water's proposed targets for reducing the number of incidents of sewage flooding of properties.



Q21. 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&15



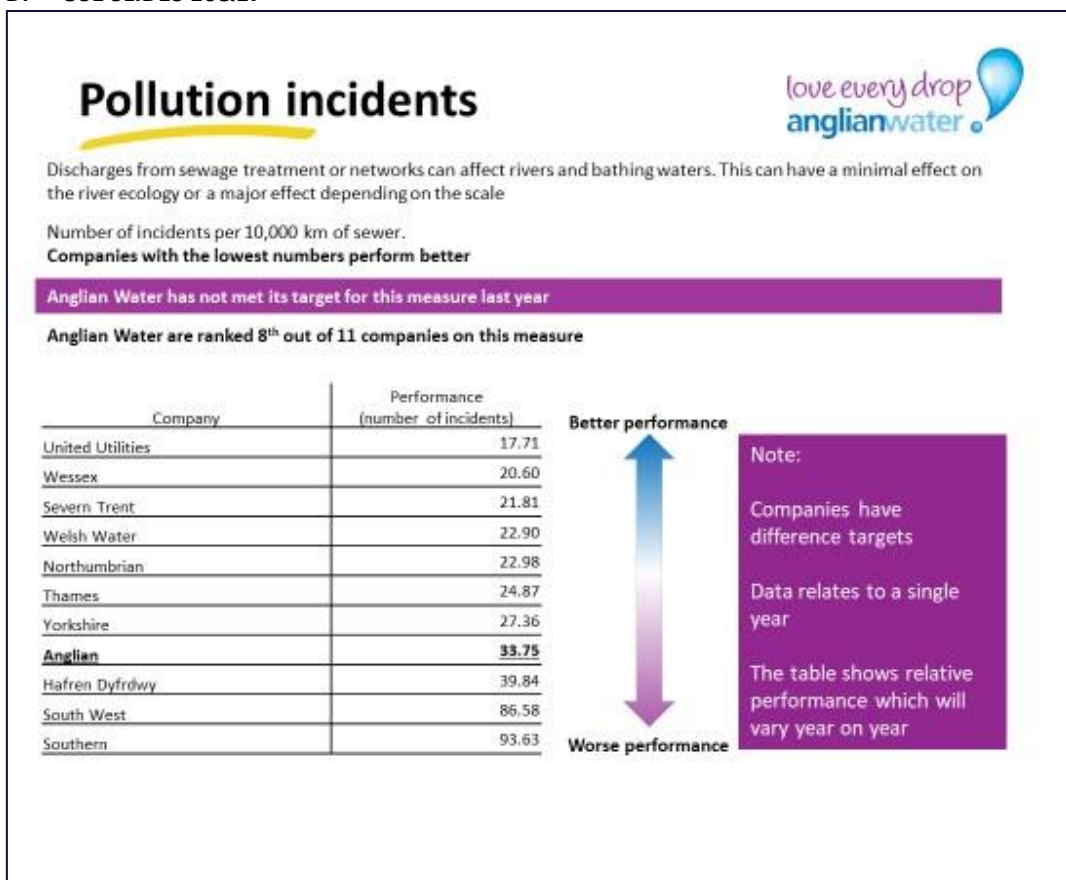
The next chart shows Anglian Water’s proposed targets for reducing the number of incidents of sewage flooding of gardens and outbuildings.



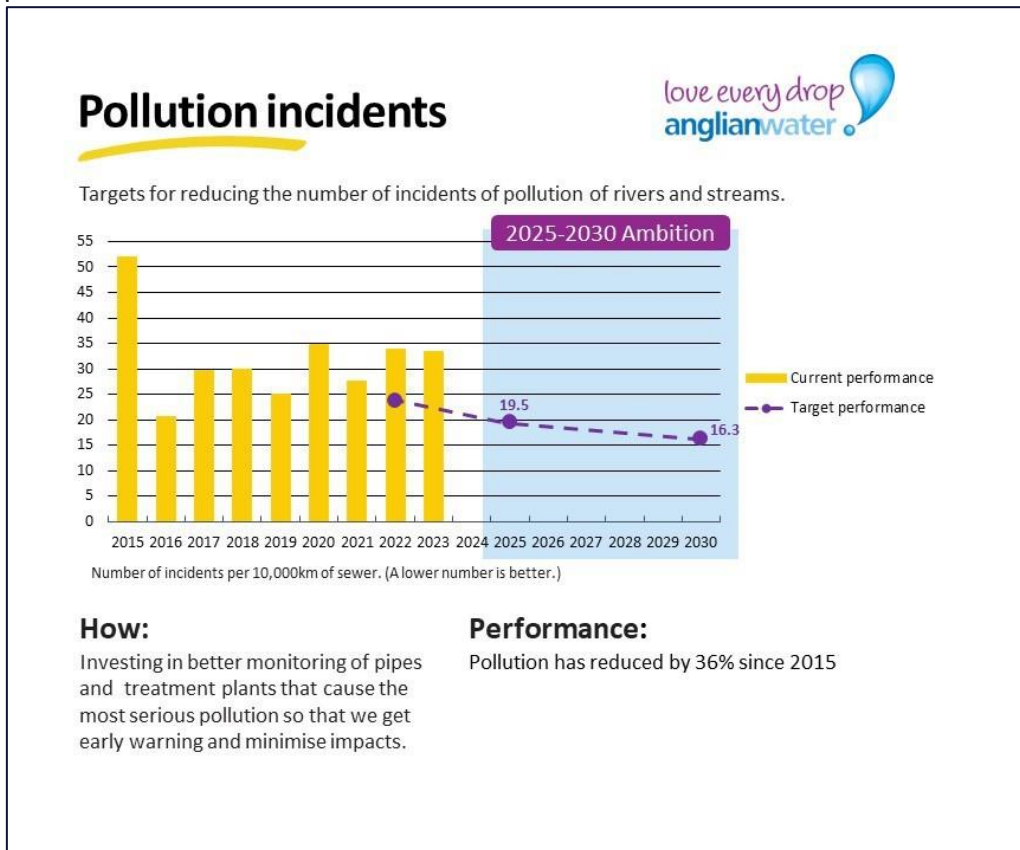
Q22. Pollution Incidents

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&17



The next chart shows Anglian Water's proposed targets for reducing the number of pollution incidents.



Q23. 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 **IF Q0=3** £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

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

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

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)

Q24. 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

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

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**

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

Q25 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**

Plans to support customers

Q26 As part of their plans for 2025-2030, Anglian Water plan to extend their financial support schemes to assist customers who need extra support. This includes schemes such as budgeting support and accessing different tariffs.T

DP USE SLIDE 24

Financial Support Schemes

love every drop
anglianwater 

In 2023, approximately **254,500 households** in the Anglian Water region may be at risk of not being able to afford their water and sewerage bills.


The Extra Care support team will assist approximately **390,000 directly billed** households this year, using a range of services to help them to budget for and pay their bill.

Anglian Water expects that the number of customers coming forward for help with their bills will continue to increase.

Customers have recently agreed to increase the level of support they pay through their bills to support others.

This will allow Anglian Water to continue to support these customers and **fund discounts of up to 50% off bills** for eligible customers over the next five years.

Every penny of the money raised from customers to fund these schemes are used to lower charges for eligible customers.



How acceptable or unacceptable do you find these plans:

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

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

Q13c. Water companies put together business plans for each five year period. The plan you've just seen is for the five years from 2025 to 2030.

From 1 April 2023 Anglian Water customers, on average, pay £493 per year (**£1.35 per day**) 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 sewage services.

Based on this high level plan, how acceptable or unacceptable do you find Anglian Water's focus for 2025-2030? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

Q14. The next set of questions are about proposed changes to your water and 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)

INSERT BILL.

(Placeholder – this graph will be tailored according to bill amounts) using: [HYPERLINK] using MAIN GRAPH HH & NHH on the “Quant” tab, cell L4

- 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

Q15. [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

Q15c. Thinking about the [IF HH] two previous questions/[IF NHH] previous question, how much did you base your responses on the impacts of the proposed bills on your [IF HH] personal household [IF NHH] your 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'
Please place the cursor on the point of the scale that reflects your view

Acceptability of the Anglian Water's plans

Q32. 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

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

Q34b How strongly do you support or oppose Anglian Water's plans and actions to deal with the challenges faced? Please click on the 'i' button to see the challenges we showed you earlier
HOVER OVER – USE SLIDE 4 FROM Q13c
SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

Strongly support
 Somewhat support
 Neither support nor oppose
 Somewhat oppose
 Strong oppose
 Don't know

Q34c Below are the six main challenges. If you oppose Anglian Water's plans to deal with any of these, please tick the box and explain why you gave this response.
DP PLEASE ADD A FREE TEXT BOX FOR EACH CHALLENGE BELOW

Improving the environment (**HOVER OVER TEXT**: Taking less water from the environment and improving quality)
 Long coast lines (**HOVER OVER TEXT**: Long stretches vulnerable to erosion)
 Significant flood risk (**HOVER OVER TEXT**: Low-lying areas at risk of tidal surges and surface area flooding)

Driest region in the UK (**HOVER OVER TEXT**: two thirds of the average UK rainfall)

Climate change (**HOVER OVER TEXT**: Higher temperatures, changing rainfall patterns, sea level rises)

Housing and population growth (**HOVER OVER TEXT**: 500,000 new homes and over 1 million more people in the next 25 years)

Investment Plans to 2050

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

Please indicate which one of the following best describes the profession of the chief income earner in your household

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

Housewife/Househusband

Unemployed

Retired **GO TO 038**

Student

Prefer not to say

IF 0=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=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

Q42b. 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](#) [Extra Care Support \(anglianwater.co.uk\)](https://www.anglianwater.co.uk/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

QINCENTIVE 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.

Q49 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

SYSTEM INFORMATION

Time interview completed:

Grid style for mobiles: [click here for example](#)

- GM 1 to force mobiles to show grid (for small grids)
- GAR 1 to show vertical text for answer headings
- GAR 2 to show vertical text for answer headings on mobile devices only

Questionnaire Style (default is 7): [Click here for details](#)

Choose base format:

- Accis3
- Accis4
- Accis5
- Accis6
- Accis7
- Accis8

Choose variations:

- Question and answer fonts (full list: <https://fonts.google.com/>)
- Header font
- Tick box style (1-6)
- Next/previous button style (1-3)
- Font colour (use HEX code [http://html-color-codes.info/#HTML Color Picker](http://html-color-codes.info/#HTML_Color_Picker))

Other colours: Note that CLR1 and CLR6 change a number of different elements (to easily keep the colours consistent)

- CLR1 # Progress bar border, progress colour, button colour
- CLR2 # Progress bar background colour
- CLR3 # Page background colour
- CLR4 # Header background colour (if different from CLR1)
- CLR5 # Header font colour
- CLR6 # Border colour for selected checkbox and checkbox border colour when hovered over (if different from CLR1)
- CLR7 # Background colour for selected checkbox (if different from CLR1)
- CLR8 Tick/circle colour for selected checkbox

Appendix B: Key summary findings from the initial review

Peer review – initial findings (10th August 2023)

What is the intent of the shadow survey?

- What are the key research questions that the shadow survey is testing and why?
 - Does high level acceptability and affordability change if customers better understand AWS activities including scale?
 - Does acceptability and affordability change once customers know what 'they are getting for their money'?
 - Does customer support change when they are aware of existing and future support for vulnerable customers?
 - Previous feedback indicated that some customers are answering "on behalf of" other more vulnerable customers rather than based on their own personal situation
 - Consider adding an additional question at the end of both mandatory and shadow survey to identify who customers were considering when answering the survey
 - Does customer support vary based on understanding the overall impact on the average bill, rather than their personal bill?
- What evidence exists to support these research questions?
 - COGs, qual feedback, other previous research?
- Focus has been on changes and additions to the shadow survey
 - We have not commented on the mandatory survey and assumes this complies with Ofwat guidance
 - Exception is some of the performance statements, which taken with additional AWS introductory information may increase the likelihood that the survey is challenged as introducing a potential positive bias

Summary of feedback on the survey changes

- Survey Length
 - Has it been tested and confirmed at 20 mins for both paper completion and online
- What is the intention for including the extra information?
 - Is it deliberately to present AWS in the most favourable light (sell/marketing approach) or to ensure customers understand the scale of the activities and services?
- Online engagement – is it mobile friendly?
 - All the materials are landscape and very detailed and may not be possible to complete on mobile.
 - *Mobile usage confirmed as OK by COGs*
 - In the latest MRS research, 47% of survey starts and completions are done on mobile, so by having a laptop/desktop only survey may potentially exclude a large proportion of the audience (particularly younger age groups) and biasing results

- Customer-friendly language
 - Some of the new text and new stimuli include wording around targets or scientific processes which may be less accessible for customers
 - Some of the materials (maps, note boxes, etc.) may not be accessible for everyone

Assurance

Document Assurance

Version	Author	Approval	Proof Read
Draft	Sarah Williams	Sandra Randall	Sandra Randall
Final	Sarah Williams	Amanda Markwardt	Amanda Markwardt

File Name

230928 Anglian Water A&AT Peer Review Report v1.1 FINAL



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