



Accent

# Acceptability and Affordability Testing Quantitative Fieldwork

Final Report

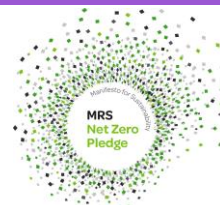
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Prepared Accent, 3 Orchard Place, London SW1H 0BF

Contact: Julian Hollo-Tas

E-mail: [Julian.Hollo-Tas@accent-mr.com](mailto:Julian.Hollo-Tas@accent-mr.com)

Telephone: 020 8742 2211



Registered in London No. 2231083, Accent Marketing & Research Limited, Registered Address: 30 City Road, London, EC1Y 2AB

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# 1 Executive Summary

## 1.1 Methodology and Fieldwork

Fieldwork for the research was carried out between 18<sup>th</sup> August and 19<sup>th</sup> September 2023. A total of 1,511 interviews were achieved overall.

1,318<sup>1</sup> Household (HH) interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). Of these 908 were in the Anglian dual supply area, 214 in the ESW Anglian area and 196 in the Hartlepool area. 785 interviews were generated by an email approach (596 in the Anglian dual supply area, 118 in the ESW Anglian area and 71 in the Hartlepool area) 533 by post (312 in the Anglian dual supply area, 96 in the ESW Anglian area and 125 in the Hartlepool area).

193<sup>2</sup> Non-Household (NHH) interviews were conducted - 190 via a specialist panel, 3 by CATI. They were split 97 in the Anglian dual supply, 44 in the ESW Anglian area, and 52 in the Hartlepool area.

## 1.2 Summary of Results

### Economic Outlook

The economic situation for households in particular was found to be tough – with 34% of households reporting having had at least some difficulty with paying household bills (with 12% of households stating that it was very or fairly difficult to manage financially). 36% expect their financial situation to worsen in the next few years.

The economic situation for businesses seemed almost as pressured – with 36% of non-household participants reporting at least some difficulty paying bills and 45% finding it difficult to manage financially now. However, the outlook was better, with 46% of businesses expecting the situation to improve and just 27% expecting it to worsen.

### Familiarity with Anglian Water’s offerings

Close to two thirds (63%) of household participants were familiar with Anglian Water’s service offerings and 2 in 5 (39%) were familiar with the support Anglian Water offer their customers.

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<sup>1</sup> Against an Ofwat/CCW mandated minimum of 500

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

## Top Priorities for investment

- “Reducing leakage” was the top water related performance commitment investment priority for both household participants (51%) and non-household participants (47%). “Preventing issues with the quality of water” was second with similar proportion of household (35%) and non-household (29%) customers choosing it. “Reducing the duration of interruptions” was rated third for both household (10%) and non-household (23%) participants.
- “Reducing the number of pollution incidents” was the top wastewater related performance commitment priority overall, chosen by 62% of household participants and 42% of non-household participants. “Reducing sewer flooding inside properties” was second for both household (23%) and non-household customers (39% - significantly higher for non-households than households). “Reducing sewer flooding outside properties” was rated third for both household (10%) and non-household (18% - again significantly higher for non-households than households).
- “Managing droughts and ensuring sufficient water for all” was chosen by 60% of household participants and 54% of non-household participants, making it the highest ranked of the first bank of service enhancements. This was followed by “improving the quality of drinking water” (21% of households and 25% of non-households) and “climate resilience and net zero” (18% of households and 20% of non-households)
- “Environmental ambition” was the most chosen of the second bank of enhancements for non-household participants at 49% (accompanied by 42% of households). “reducing spills” was the priority for households with 45% of responses (accompanied by 32% of non-households). “Managing growth” was third most chosen (by 13% of households and 20% of non-household participants).

## Acceptability of plan including bill (shadow question type)

When asked the hybrid acceptability/ affordability question, it was found that overall, 71% of customers found the high-level plan (including associated bill increase, acceptable). This derives down to 68% of households and 76% of non-household customers finding the proposed plan/increase acceptable.

## Affordability (mandated question type)

Overall, almost 1 in 4 participants (23%) said it would be fairly or very easy to afford the proposed bill (17% of households and 39 of non-households). By contrast, 36% said that stated the bill increases would be fairly or very difficult to afford (39% of households, 30% of non-households). 38% stated that it would be neither easy nor difficult (41% and 32% respectively).

Lower income households found the bills particularly difficult to afford, with over half of households with an income under £15,999 finding the increases very or fairly difficult to afford. The number of those saying the bill was fairly or very easy to afford was significantly higher amongst metered users (19%) than unmetered users (12%), and amongst males vs female participants (20% vs 14%).

A significantly higher volume of metered non-households 42% also found the proposed increased fairly or very easy for afford, then unmetered (27%)

## Acceptability (mandated question type)

The proportion of participants that found the proposed plan acceptable or completely acceptable was 69% overall (65% of households, 79% of non-households); 71% in the dual supply area, 64% in both ESW and Hartlepool areas.

65% of household participants found the plan acceptable (either fairly or very), with 23% finding the plan unacceptable and 12% unable to say. Customers that found the plan acceptable support what Anglian Water is trying to do long term (53%), feel like their plans are focusing on the right services (39%), and trust Anglian to do what is best for their customers (21%). The main reasons for household participants finding the plan unacceptable were mainly financially driven; with company profits being too high (51%), the bill increase being too expensive (37%); and that companies should pay for the improvements (30%), being the top three responses.

The number of non-household participants that found the plan acceptable or completely acceptable was significantly higher than households at 79% (and correspondingly a lower percentage of non-households stating that the plan was unacceptable (19%)). Significantly fewer non-households (2%) than households were unable to say. Like household customers, businesses find the plan acceptable because they support what Anglian Water are trying to do long term (56%), feel Anglian Water plans focus on the right services (39%) and they trust them to do what is best for their customers (22%). Again, the main reasons for non-household unacceptability were similar to those of household customers, with the top 3 reasons being: The bill increase being too expensive (40%), company profits being too high (30%), and not being able to afford the bill increase (25%) being the top three responses.

## Support and Challenges

There has been a large positive response with over half (52%) of households supporting and only 10% opposing the plan.

The support was even higher among non-household customers with 70% saying they somewhat or strongly support Anglian opposed to only 16% that said they oppose them.

A majority of participants (64% of households and 68% of non-households) did not object to plans to tackle any of the 6 items identified to participants as being Anglian Water's main challenges (environmental improvement, housing and population growth, climate change, significant flood risk, driest region of the UK, and long coast

lines). All challenges did attract *some* objections, the most objected to being “environmental improvements” (22% of households and 20% of non-households), and the least “long coastlines” (7% of households and 6% of non-households

## Intergenerational Fairness

Both household and non-household audiences would prefer increases to start sooner and be better spread across different generations of bill payers (41% and 62% of responses respectively).

A remarkably large proportion of household customers (41%) said they didn’t know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.

Just 18% of household participants, and 23% of non-household participants, chose to delay increases and pass more of them on to younger and future bill payers.

## 2 INTRODUCTION

### 2.1 Background

Ofwat's customer engagement policy paper sets out its expectations of what companies engagement with customers should look like as they develop their PR24 Business plan and Long-Term Delivery Strategy (LTDS). As part of this, all water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting in October 2023 their plans for the upcoming Price Review (PR24). To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken.

Anglian Water commissioned Accent to conduct that research, and the outputs of that research are available separately.

In addition, Anglian Water perceived that there would be benefit in commissioning Accent to carry out supplementary quantitative research that in many ways mirrored and followed the guidance, but deviated from it in a number of key ways – primarily the order and content of the questionnaire. It was felt that an alternative perspective on questions such as acceptability and affordability would add context to the wider PR24 engagement picture.

This report represents the findings from this additional quantitative “Shadow” research project.

### 2.2 Objectives

The overarching objective of this research is to measure customer support for the PR24 Business Plan from an alternative perspective to the mandated research.

More specifically, the research aims to:

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

## 2.3 Report Structure

This document is the report on the shadow quantitative version of the affordability and acceptability testing for Anglian Water. This report describes survey design and methodologies alongside customers' view on the affordability and acceptability of Anglian Water' AMP8 business plan (using alternative questions and question ordering).

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

## 2.4 Economic/media backdrop

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

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

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

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

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



# 3 METHODOLOGY

## 3.1 Introduction

Generally speaking the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”) was followed as far as possible.

Fieldwork and sampling in particular were essentially guidance compliant (other than a slight (<5%) quota shortfall in some areas, caused by prioritising available sample for the mandated Acceptability and Affordability Testing research).

## 3.2 Cognitive testing

Comprehensive cognitive testing was carried out. 6 cognitive interviews with household customers were carried out using Zoom with the participant filling in the online survey and an Accent moderator observing and probing.

The full report can be found in Appendix G.

## 3.3 Sampling and approach

### Household (HH) sampling

The Anglian Water area was treated as three locations – the first location is the area supplied both clean water and wastewater services by Anglian Water (“Anglian Dual”), the second where the wastewater services are provided by Anglian Water but the clean water by Essex & Suffolk Water (“ESW Anglian”), and the third where the area is supplied clean water only by Hartlepool Water (“Hartlepool”). This is as on the A&AT survey.

The target number of interviews was 1200<sup>3</sup> (800 Dual, 200 each for ESW and Hartlepool). Recruitment was conducted using Anglian Water customer lists with flags for priority service register (PSR) and social tariff. This mirrors the A&AT survey.

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation.

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

Primarily, the recruitment used a push-to-web approach with online survey links and QR codes provided in the letter and email invitations. Participants were also offered the opportunity to make any accessibility requests (including requesting a paper version of the questionnaire to fill in and post back) – 74 such requests were received and honoured (49 in Anglian Dual, 10 in ESW Anglian, 15 in Hartlepool). This mirrors the A&AT survey.

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

#### Dual Anglian area

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

## ESW Anglian

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

## Hartlepool

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

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

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

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

## Household (HH) Fieldwork

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

Responses to these mailings follow:

### Anglian Dual

Interviews wanted	800				
Assumed %	4.50%				
n=	17778				
IMD Decile	Total	email	Post	Total	
1	1248	743	493	1236	
2	1681	984	690	1674	
3	1725	1047	669	1716	
4	1896	1169	719	1888	
5	1761	1114	643	1757	
6	2372	1501	865	2366	
7	1959	1181	770	1951	
8	2102	1332	759	2091	
9	1723	1061	657	1718	
10	1199	766	427	1193	
Unknown	111	98	11	109	
<b>TOTAL</b>	<b>17778</b>	<b>10996</b>	<b>6703</b>	<b>17699</b>	
Interviews after initial mailing		596	312	908	
Conversion rate after initial mailing		5.42%	4.65%	5.13%	

### Anglian ESW

Interviews wanted	200				
Assumed %	4.50%				
n=	4444				
IMD Decile	Total	email	Post	Total	
1	350	184	166	350	
2	385	185	200	385	
3	499	266	233	499	
4	562	294	268	562	
5	609	308	301	609	
6	420	184	236	420	
7	390	194	196	390	
8	438	228	210	438	
9	404	179	225	404	
10	365	161	204	365	
Unknown	21	17	4	21	
<b>TOTAL</b>	<b>4444</b>	<b>2200</b>	<b>2243</b>	<b>4443</b>	
Interviews after initial mailing		118	96	214	
Conversion rate after initial mailing		5.36%	4.28%	4.82%	

## Hartlepool

Interviews wanted	200				
Assumed %	4.50%				
n=	4444				
IMD Decile	Total		email	Post	Total
1	1930		793	1137	1930
2	788		303	485	788
3	374		136	238	374
4	206		95	111	206
5	252		90	162	252
6	62		21	41	62
7	313		126	187	313
8	252		93	159	252
9	207		65	142	207
10	49		12	37	49
Unknown	11		8	3	11
TOTAL	4444		1742	2702	4444
		Interviews after initial mailing	71	125	196
		Conversion rate after initial mailing	4.08%	4.63%	4.41%

We exceeded the full target of interviews in each area (other than Hartlepool, where it was judged that the total number of interviews achieved was acceptable) and hence did not send any reminders.

## Non Household (NHH) sampling and fieldwork

A target of 200 Non-household interviews was set<sup>4</sup>.

A total of 193 interviews were obtained (97 in the Anglian dual supply, 44 in the ESW Anglian area, and 52 in the Hartlepool area). NHH bill-payers were recruited mainly via Quest Mindshare (a specialist NHH panel, 203 interviews) with a handful of CATI surveys (3).

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

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

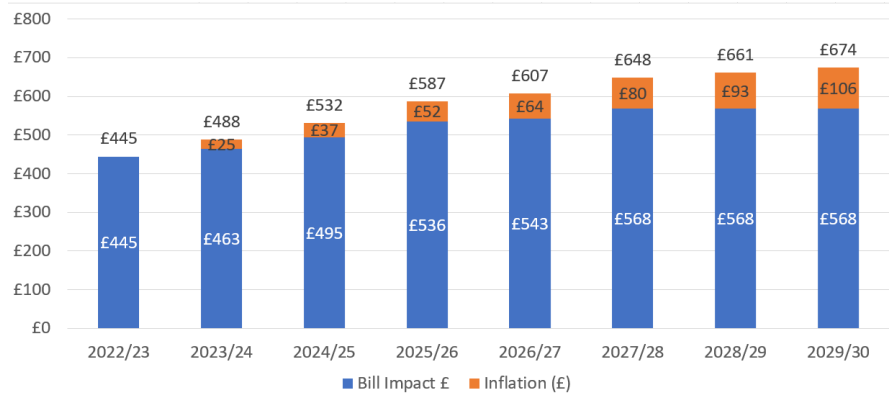
<sup>4</sup> The minimum NHH sample size listed in the guidance is 200.

## Survey

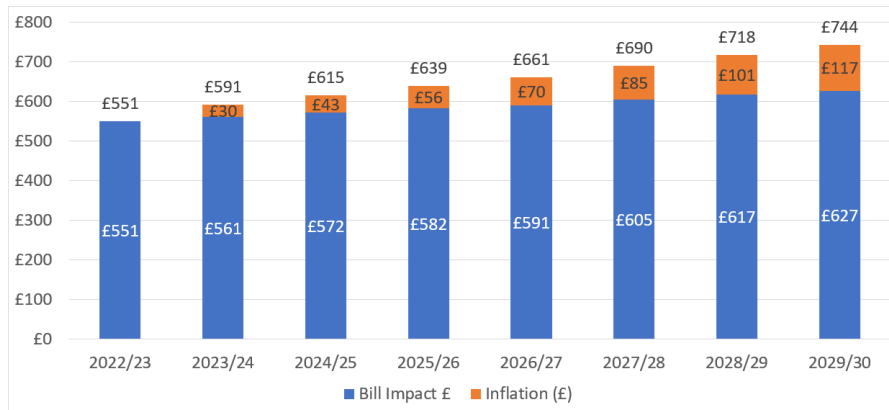
The questionnaire itself retained where possible components of the Acceptability and Affordability testing research.

The same bill increases (and method of displaying them) was used.

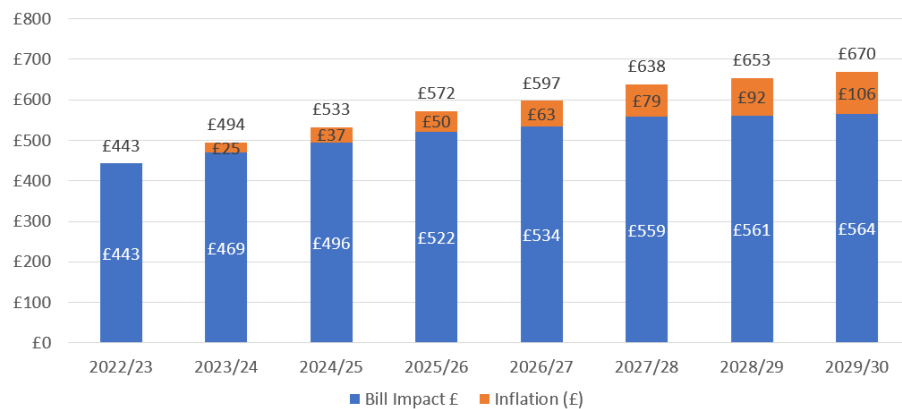
### Dual Anglian:



### ESW Anglian



### Hartlepool



The same materials were used to impart the details of the same business plan improvements (performance commitments and enhancements), in the same way as in the Acceptability and Affordability research.

The main departures from the Guidance mandated questionnaire script include conducting the financial temperate check as mandated, then showing all business plan components, *then* looking at affordability, in the form of a hybrid affordability/acceptability question:

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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

At this point, the survey asked the A&AT guidance mandated affordability question (out of place in the survey order but otherwise unaltered).

The survey then picked up the mandated A&AT strand of acceptability questioning before asking a pair of additional unmandated questions:

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 tydal 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)

Before finishing with the standard mandated intergenerational fairness and demographic questions from the mandated survey.

The full survey can be found in appendices D, E, and F.

### 3.4 Fieldwork dates

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

### 3.5 Data processing

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

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

#### Weighting

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

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



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

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

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

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

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

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

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

This is all identical to the analysis employed on the Acceptability and Affordability research.

### 3.6 Note on data merging

Anglian Water initially separately commissioned Accent to test affordability and acceptability of the joint bill/plan in the Anglian dual supply and Hartlepool Water

areas, and acceptability only of the wastewater only plan in the ESW Anglian area (in line with the guidance). However, affordability of the joint bill in the ESW area was tested – and following confirmation from ESW that they had tested the ‘Water only’ bill in the ESW Anglian area, the decision was taken to include the results of the combined bill affordability testing done in all three areas, in the company’s Acceptability and Affordability report. An identical approach has been taken in this research.

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

# 4 FINDINGS

## 4.1 Introduction

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

## 4.2 Demographics

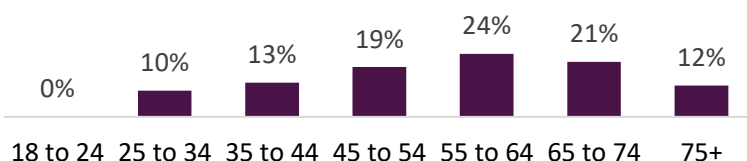
### HH Demographics

1,318 Anglian Water household customers took part in the Affordability and Acceptability Testing research (908 in the Anglian dual supply area, 214 in the ESW Anglian area and 193 in the Hartlepool area). 785 responded to our email invitation (596 in the Anglian dual supply area, 118 in the ESW Anglian area and 71 in the Hartlepool area) and 533 to our postal invitations (312 in the Anglian dual supply area, 96 in the ESW Anglian area and 125 in the Hartlepool area). This is how their profiles fell out (pre weighting). Percentages may not add up to 100 due to rounding

#### Gender



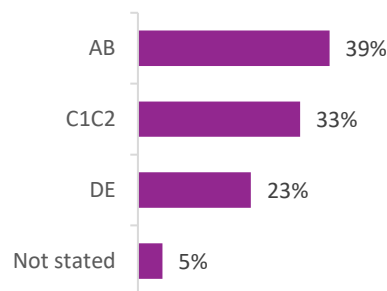
#### Age



#### IMD decile

1	8%
2	8%
3	8%
4	9%
5	9%
6	10%
7	9%
8	10%
9	10%
10	7%
Unknown	1%

#### Social Grade



#### Ethnicity

English, Welsh, Scottish, Northern Irish or British	92%
Any other White background	2%
Indian	1%
Prefer not to say	2%

#### Vulnerability

... is disabled or suffer(s) from a debilitating illness	20%
... have/has a learning difficulty	5%
... relies on water for medical reasons	6%
... is visually impaired	2%
... am/is over the age of 75 years old	13%
... speaks English as a second language	3%
... is deaf or hard of hearing	8%
... is a new parent	4%
None of these apply to me	54%
Prefer not to say	4%

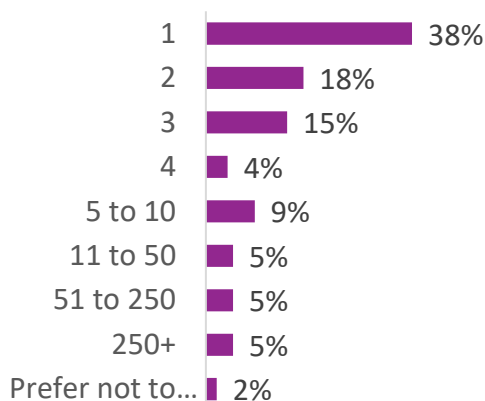
## NHH Demographics

193 Anglian Water business customers took part in the Affordability and Acceptability Testing research (97 in the Anglian dual supply area, 44 in the ESW Anglian area and 52 in the Hartlepool area). 190 interviews were achieved through specialist panel, 3 via CATI. This is how the profiles fell out. Percentages may not add up to 100 due to rounding.

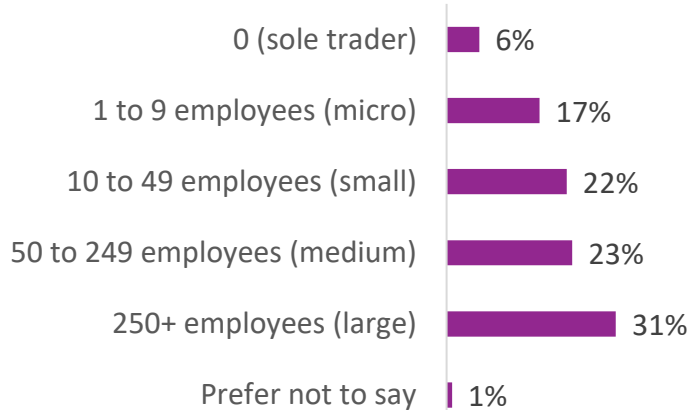
### Main use of water on premises

For normal domestic use for your organisation`s customers and employees	<b>78%</b>
For the supply of services your organisation provides	<b>43%</b>
For an ingredient or part of the product or service your organisation provides	<b>28%</b>
For the manufacturing process which is essential to the running of your organisation	<b>23%</b>
None of the above	<b>1%</b>
Don't know	<b>1%</b>

### Number of business sites



### Number of employees



### Industry

Construction	<b>11%</b>	Finance and insurance activities	<b>4%</b>
Wholesale and retail trade	<b>11%</b>	Other service activities	<b>3%</b>
Manufacturing	<b>10%</b>	Energy or water service & supply	<b>2%</b>
Hotels & catering	<b>9%</b>	Public administration and defence	<b>2%</b>
Human health and social work activities	<b>9%</b>	Arts, entertainment and recreation	<b>2%</b>
Education	<b>7%</b>	Agriculture, forestry and fishing	<b>1%</b>
IT and Communication	<b>6%</b>	Real estate activities	<b>1%</b>
Professional, scientific and technical activities	<b>6%</b>	Other	<b>7%</b>
Administrative and Support Service Activities	<b>5%</b>	Prefer not to say	<b>1%</b>
Transport and storage	<b>4%</b>		

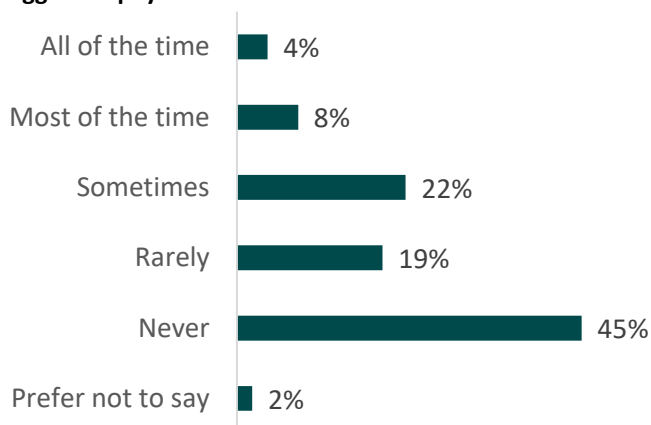
## 4.3 Financial Temperature Check

### Household Financial Temperature Check

Over to 2 in 5 (45%) of those we spoke to say they never struggle to pay their bill, however a third do (34%), at least sometimes.

- Females in particular struggle to pay their bill at least sometimes, with 42% saying they did compared to 24% of males (a statistically significant difference). In contrast, 58% of males also say they never struggle to pay their bills compared to only 34% of females. This is too, is a significantly different.
- Similar was seen with Socio-economic group (SEG) DE, where 59% say they are struggling to pay at least sometimes (a significantly higher proportion than 20% of AB and 34% of C1C2 participants).

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

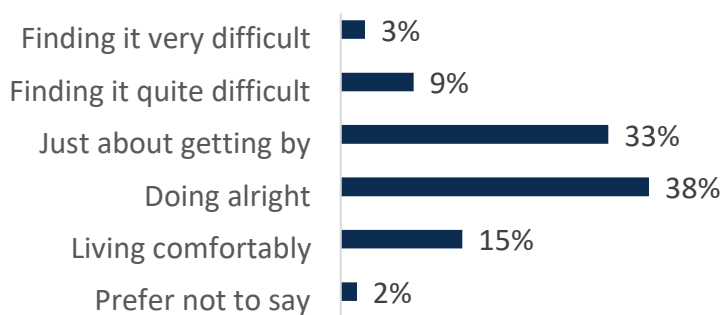


Base: All HH participants weighted base (1,051)

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

- Females again (52%) are significantly more likely to be struggling to manage financially than males (37%).
- 70% of SEG DE also struggle managing their finances – statistically significantly when compared to those in other social grades (AB=31%; C1C2=47%).

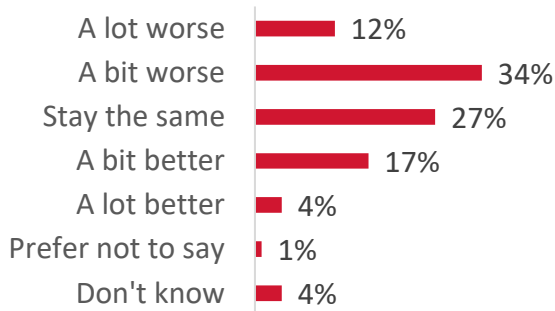
**Figure 2. Q10 Overall, how well would you say you are managing financially now?**



Base: All HH participants weighted base (1,051)

Close to half of households (46%) expect their financial situation to worsen in the next few years and 1 in 5 (21%) expect it to improve.

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

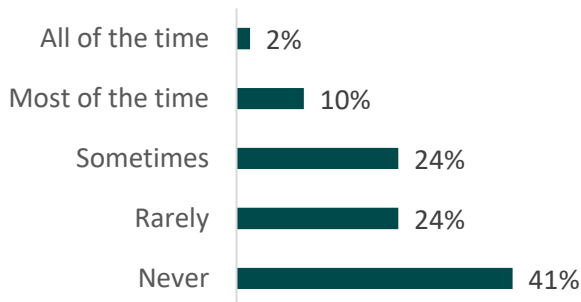


Base: All HH participants weighted base (1,051)

## Non-household Financial Temperature Check

41% of businesses say they never struggle to pay their bills. However, a just over a third do have some difficulty paying their bills (36%).

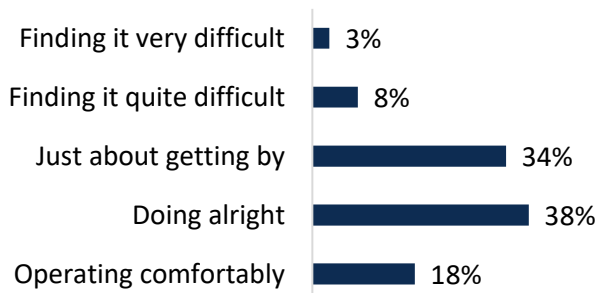
**Figure 4. Q9 Thinking about your finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills?**



Base: All NHH participants weighted base (460)

Over 2 in 5 businesses (45%) are operating with financial difficulty, with less than 1 in 5 (18%) operating comfortably.

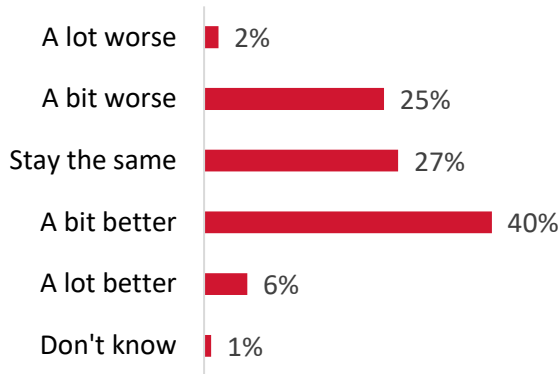
**Figure 5. Q10 Overall, how well would you say your organisation is managing financially now?**



Base: All NHH participants weighted base (460)

Almost half of businesses (45%) expect their financial situation to improve in the years to come, with just over a quarter (27%) expecting it to worsen.

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



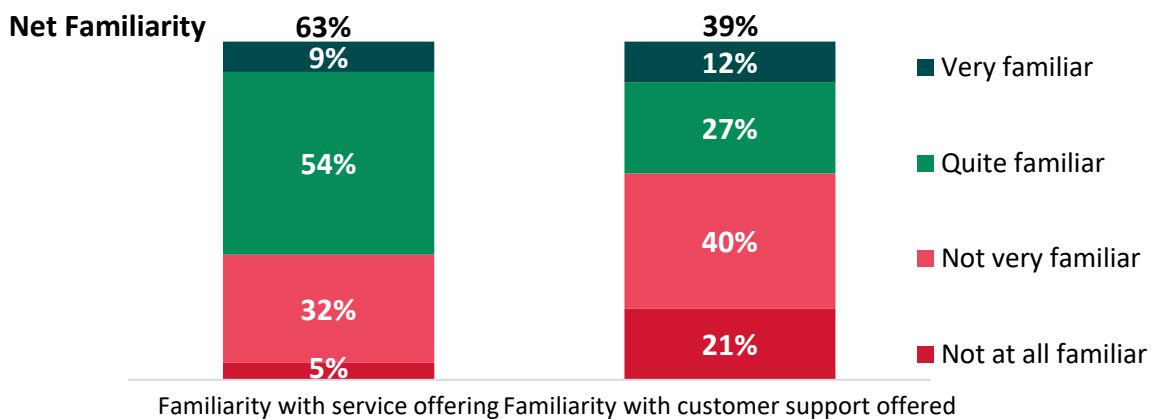
Base: All NHH participants weighted base (460)

## 4.4 Familiarity with Anglian Water's offering

### Household Familiarity with Anglian Water's offering

Close to two thirds (63%) of household participants were familiar with Anglian Water's service offerings and 2 in 5 (39%) were familiar with the support Anglian Water offer their customers.

**Figure 7. Q13b. Please take a look at the following information about Anglian Water. Before this interview how familiar were you with Anglian Water and the services they offer? Q13bb. Anglian Water offers support to customers who may struggle to pay their bills. How familiar are you with the services that Anglian Water provides for customer who might need extra support?**



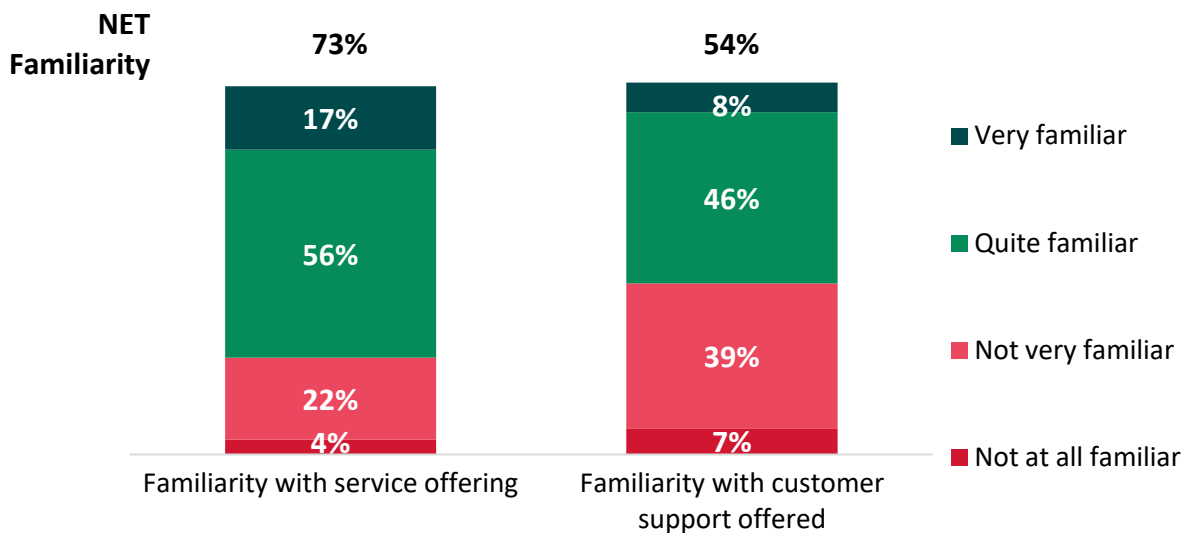
Base: All HH participants weighted base (1,051)



## Non-Household Familiarity with Anglian Water’s offering

Business participants had higher levels of familiarity with Anglian Water’s services and offerings compared to household participants. Almost three quarters of participants (74%) were familiar with Anglian service offerings and over half (54%) were familiar with the support Anglian Water offer their customers.

**Figure 8. Q13b. Please take a look at the following information about Anglian Water. Before this interview how familiar were you with Anglian Water and the services they offer? Q13bb. Anglian Water offers support to customers who may struggle to pay their bills. How familiar are you with the services that Anglian Water provides for customer who might need extra support?**



Base: All NHH participants weighted base (460)

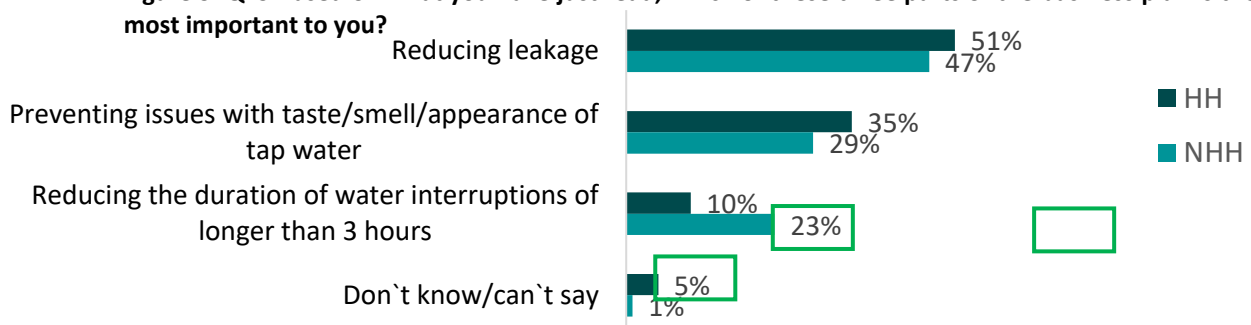
## 4.5 Investment Priorities

### Performance commitments – water related

Reducing leaks was chosen as the most important performance commitment by household customers and non-household customers alike.

■ This was significantly higher among males (59%) compared to females (43%)

**Figure 9. Q19 Based on what you have just read, which of these three parts of the business plan is the most important to you?**



Base: Dual + H’pool HH participants weighted base (794) and Dual + H’pool NHH participants weighted base (401)

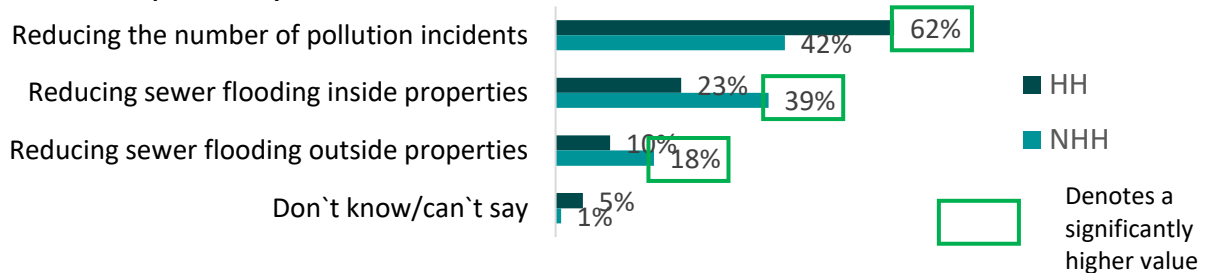
Preventing issues with the quality of water was rated second by both households and non-households. Reducing the duration of interruptions was rated significantly more important for non-household customers (23%) than for household customers (10%).

## Performance commitments – pollution and sewage related

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

- This was significantly higher among males (70%) compared to females (55%).

**Figure 10. Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you?**



Base: Dual + ESW HH participants weighted base (1,035) and Dual + ESW NHH participants weighted base (449)

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

- Significantly more important to females (26%) than males (20%).

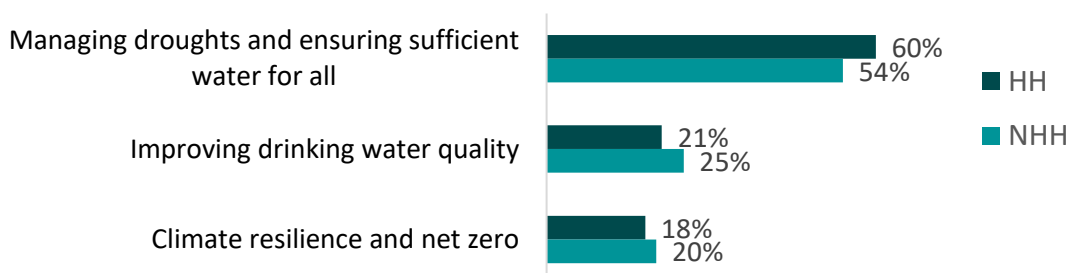
Reducing the number of incidents of sewage polluting outside of properties was the third rated improvement with businesses rating these significantly higher than households.

## Enhancement cases – Bank 1

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

- This was significantly higher among males (64%) compared to females (57%)

**Figure 11. Q24. Based on what you have just read, which of these four parts of the business plan is the most important to you?**



Base: Dual + H'pool HH participants weighted base (794) and Dual + H'pool NHH participants weighted base (401)

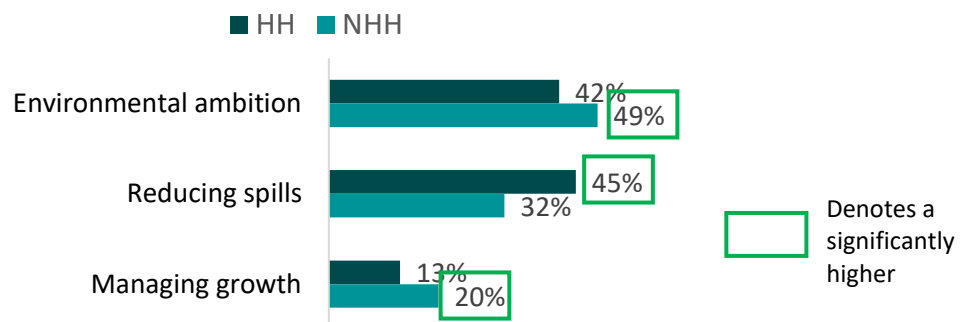
Improving drinking water quality was rated second and Climate change resilience was chosen as most important option least, however this was still chosen by around 1 in 5 businesses and households.

## Enhancement cases – Bank 2

Environmental ambition was the top rated enhancement with overall 44% of participants choosing this.

- A significantly higher number of Non-households have chosen this as their top enhancement than households
- This was significantly more important for females (49%) than males (36%)

**Figure 12. Q25. Based on what you have just read, which of these four parts of the business plan is the most important to you?**



Base: Dual + ESW HH participants weighted base (1,035) and Dual + ESW NHH participants weighted base (449)

Reducing spills was a close second enhancement with 41% of participants choosing this. This was significantly higher among household participants.

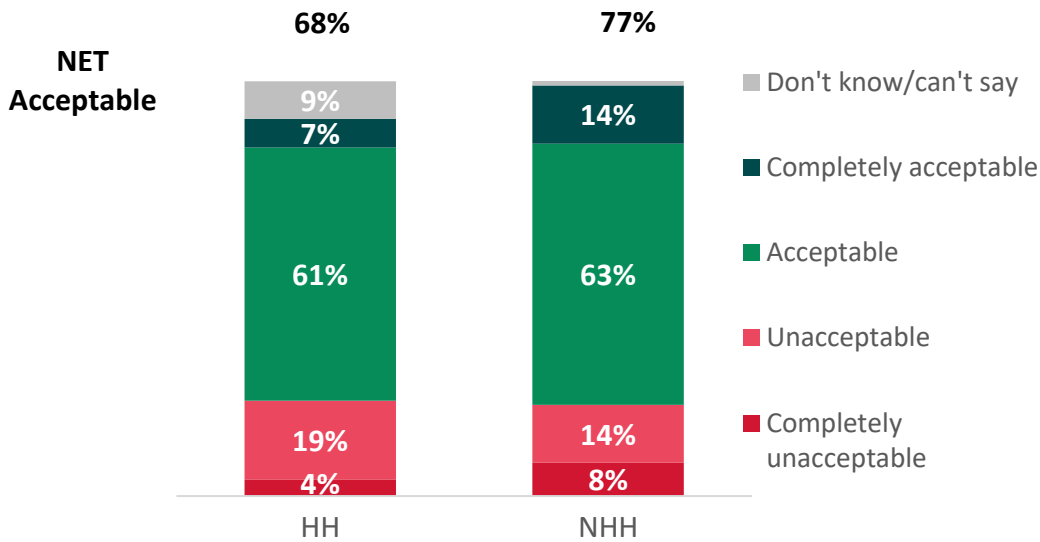
- A significantly higher proportion of males (50%) have chosen this compared to females (39%)

Managing growth came in third with overall 15% of participants choosing this enhancement. A significantly higher proportion of non-household participants selected this option compared to household.

## 4.6 Acceptability of plan including bill (shadow question type)

When asked the hybrid acceptability/ affordability question, it was found that overall, 71% of customers found the high-level plan (including associated bill increase, acceptable). This derives down to 68% of households and 76% of non-household customers finding the proposed plan/increase acceptable.

**Figure 13. Q13c. Every year, water companies review their water and sewerage charges to make sure customers are getting the best value for money. From 1 April 2023 Anglian Water customers, on average, pay £1.35 per day or £493 per year for all water and sewerage services. The total average household bill in the period from 2025-2030 will be or £558 per year (£1.53 per day) water and sewerage services. Based on this high level plan, how acceptable or unacceptable do you find Anglian Water’s focus for 2025-2030?**



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

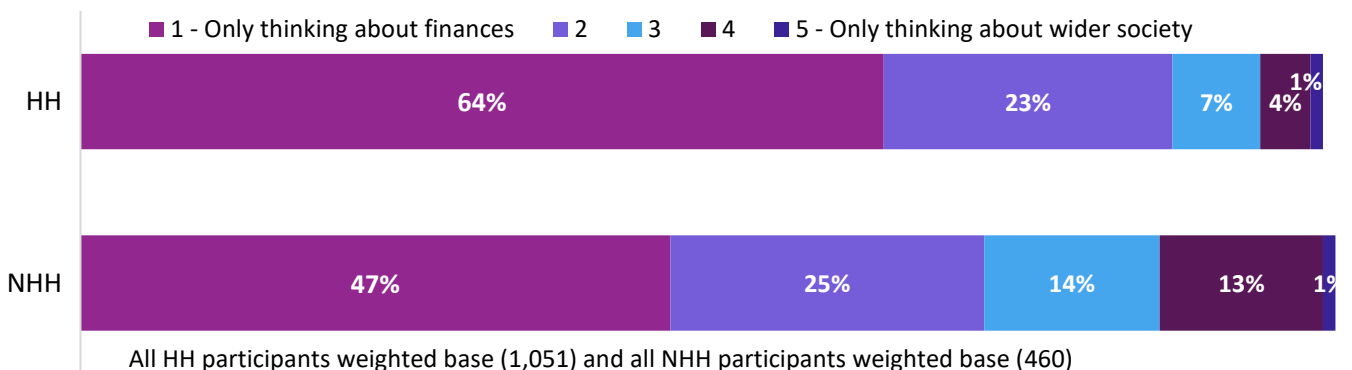
### Reasoning behind answers

Another question that was asked in addition to the guidance related content was a question intended to dive deeper into the reason behind the participants’ answer.

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

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

**Figure 14. Q15c. Thinking about the previous question, how much did you base your responses on the impacts of the proposed bills on your personal household/company/organisation finances and wider society?**



## 4.7 Affordability (mandated question type)

The prevalence of participants stating that the proposed bill increases would be very or fairly easy to afford, was low, at 23% overall. Just 17% of households and 39% of non-households said the increases would be fairly or very easy to afford.

By contrast, 36% said that stated the bill increases would be fairly or very difficult to afford (39% of households, 30% of non-households). 38% stated that it would be neither easy nor difficult (41% and 32% respectively).

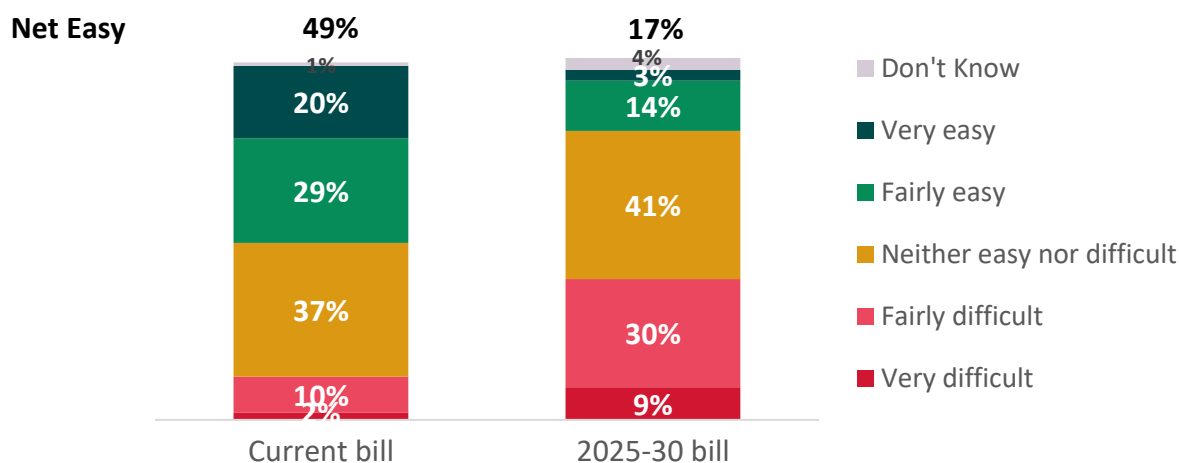
### Household Affordability

Currently, 49% of households can afford their existing water and sewerage bills fairly or very easily.

Only 17% of household customers thought that the proposed bill would be fairly or very easy to afford.

- The number of households that say that the proposed bill would be fairly or very easy to afford is marginally higher among those that have been invited to take part in the survey by email (18%) than those that have invited to take part by post (15%).
- Males are significantly more likely to find the future bill fairly or very easy compared to females (20% vs 14%).
- Females are significantly more likely to find the bill fairly or very difficult (45% vs 33%).

Figure 15. Q13 How easy or difficult is it for you to afford to pay your current water and sewerage bill?  
Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?



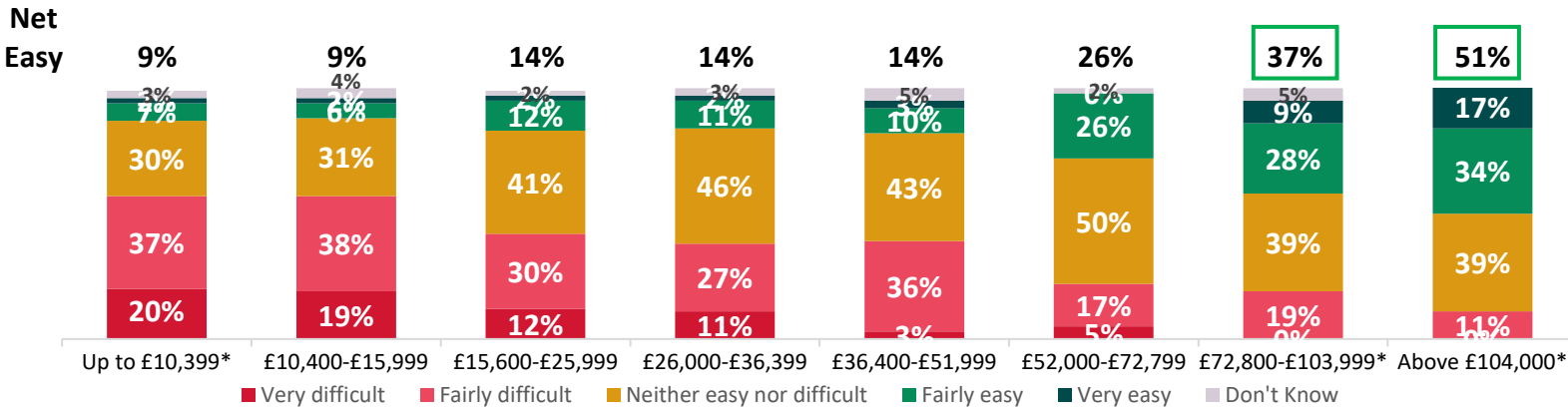
Base: All HH participants weighted base (1,051)

The increase in the water and sewage bill is likely to become problematic for those that are already struggling financially (finding it very or quite difficult to manage

financially). 56% say they are already finding it very or fairly difficult to pay their current water bill, this number increases to 78% when asked about the 2025-30 bill.

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

**Figure 16. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**

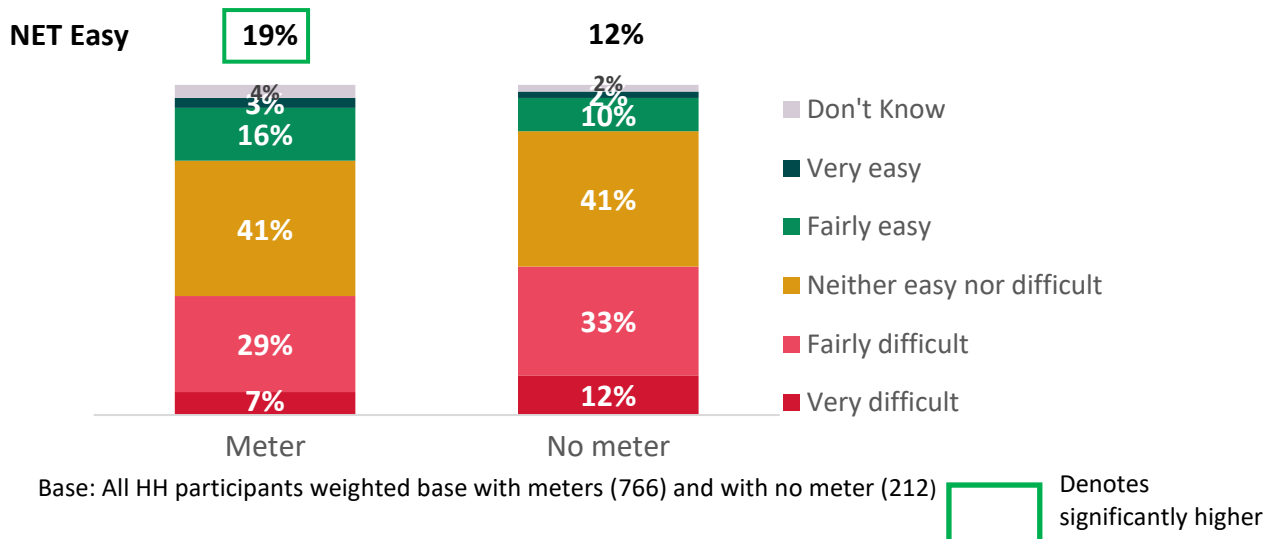


Base: All HH participants weighted base Up to £10,399 (68), £10,400-£15,999 (101), £15,400- 25,999 (153) £26,000-£36,600 (114), £36,400-£51,999 (177), 52,000 -£72,799 (103), £72,800-£103,999 (68) Above £104,000 (37)\*Caution low base – results indicative only

   Denotes significantly higher

Perceived affordability of the future bill is higher among those customers that have a water meter compared to those that don't. 19% of those with a water meter say they would find it easy to pay the bill in the future compared to 12% of those that currently don't have a meter (a significant difference).

**Figure 17. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**



Base: All HH participants weighted base with meters (766) and with no meter (212)

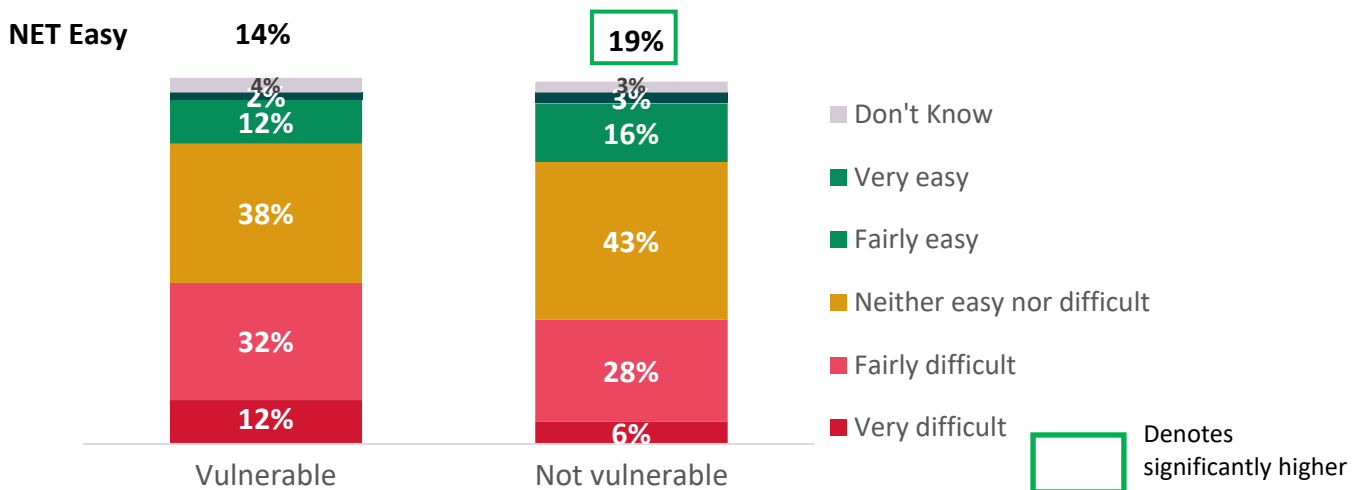
   Denotes significantly higher

Affordability (net very/fairly easy) is significantly lower among households that have members with any vulnerability (at 14%) compared to households without vulnerable members (19%).

These households are significantly more likely to find the proposed bill fairly or very difficult to pay (44%) compared to those without a vulnerable members (34%).

When looking at vulnerability by type\* we see that those that are considered vulnerable for medical reasons are significantly more likely to say they will find these bills fairly or very difficult (48%) compared to those considered vulnerable because of life stage (36%). They are also more likely to find it fairly/very difficult than those with a communication vulnerability (45%).

**Figure 18. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**



Base: All HH weighted base with vulnerable members (459) and HH with no vulnerable members (562)

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

Those that would not find their bill fairly or very easy to pay the bill in the future said they would do the following changes to be able to pay it:

- most often that they would spend less on essentials (55%),
- use less water (46%),
- spend less on food shopping and essentials (40%)

**Figure 19. Q15 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?**



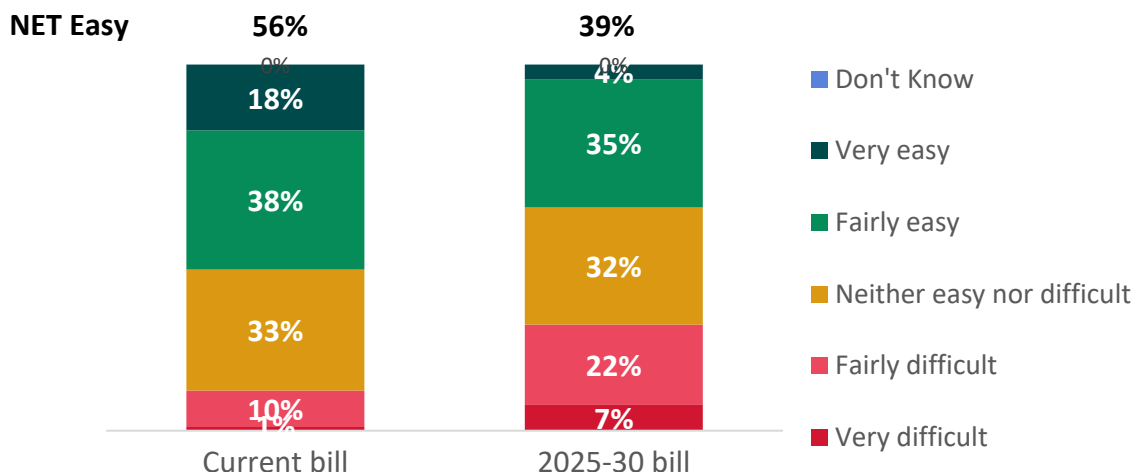
Base: All HH that would find it difficult to pay the future bill weighted base (837)

### Non-household Affordability

Affordability is higher among the non-household population compared to the household population. Over half of businesses (56%) find their bills easy or very easy to afford. This however drops down to 39% when thinking about the future bill.

The affordability of the water and sewerage bill is likely to become problematic for businesses that are already struggling financially (those finding it very or quite difficult to manage financially). 42% say they are finding it very or fairly difficult to pay their current water bill; this number increases to 54% when asked about the 2025-30 bill.

**Figure 20. Q13 How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills?**

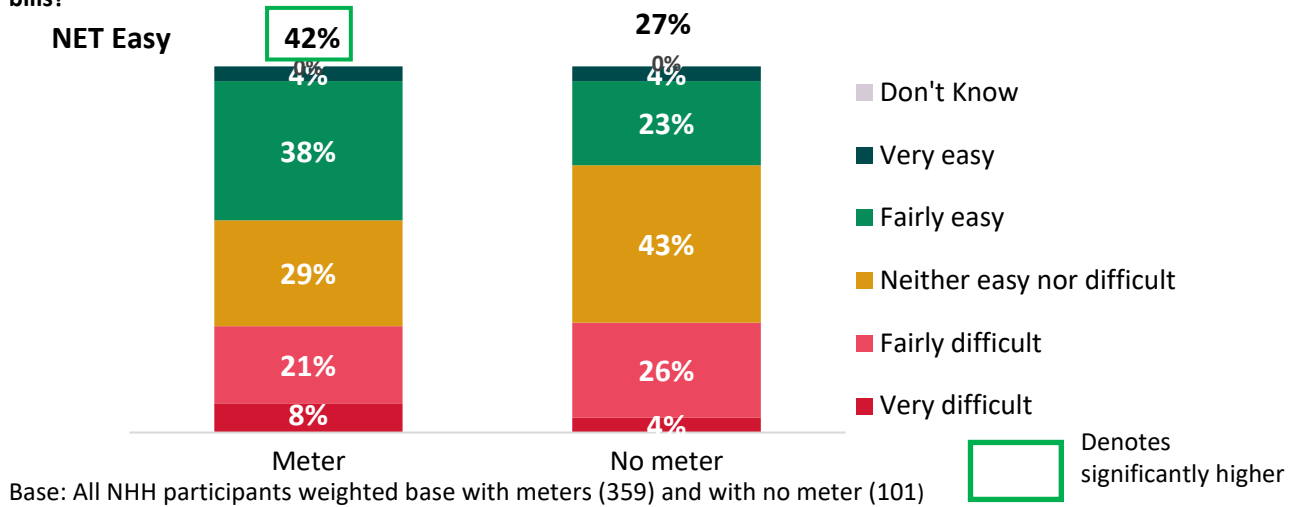


Base: All NHH participants weighted base (460)



Just like with households, perceived affordability of the future bill is higher among non-household customers that have a water meter compared to those that don't. 42% of those with a water meter say they would find it easy to pay the bill in the future compared to 27% of those that currently don't have a meter; a significant difference.

**Figure 21. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills?**



## 4.8 Acceptability (mandated question type)

Acceptability of the proposed business plan was high at 69% overall. 65% of households and a significantly higher proportion of non-households, 79%, found the plan was acceptable or completely acceptable.

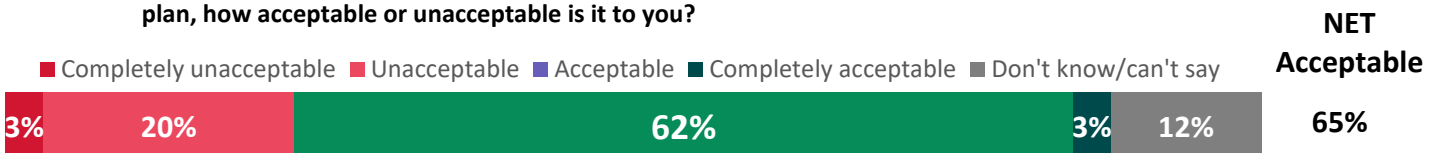
- 71% of customers in the dual supply area found the plan acceptable, 64% in the ESW Anglian and Hartlepool areas.

### Household Acceptability

Two thirds (65%) of Anglian Water customers we spoke to, found the proposed plan acceptable.

There are no significant difference by age, gender or social grade when looking at acceptability.

**Figure 22. Q32 Based on everything you have seen and read about Anglian Water' proposed business plan, how acceptable or unacceptable is it to you?**



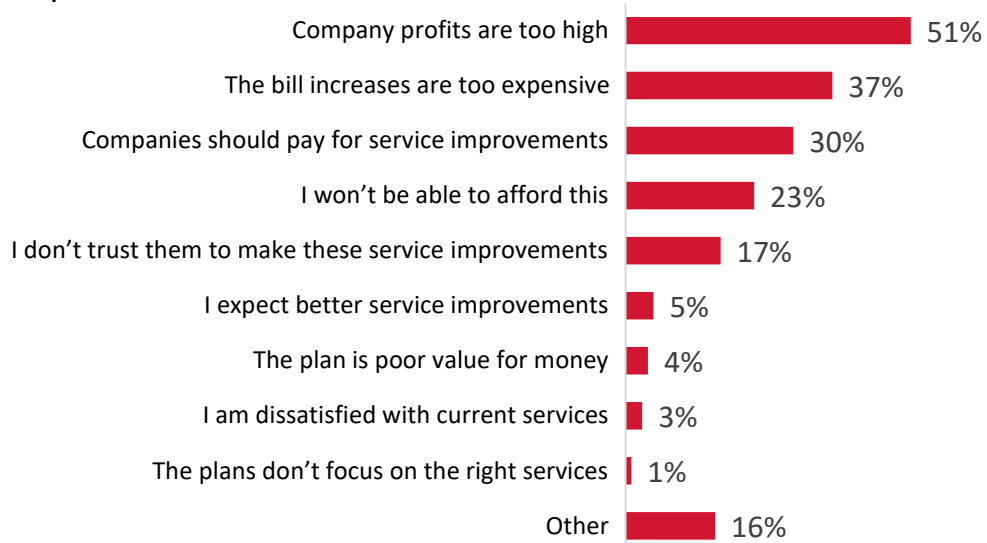
Base: All HH participants weighted base (1,051)

### Reasons for unacceptability

23% of household participants found the proposed plan unacceptable. The top 3 reasons are all financially driven. Company profits are too high (51%), the bill increase

being too expensive was top (37%) followed by the belief that companies should pay for the improvements (30%).

**Figure 23. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable?**

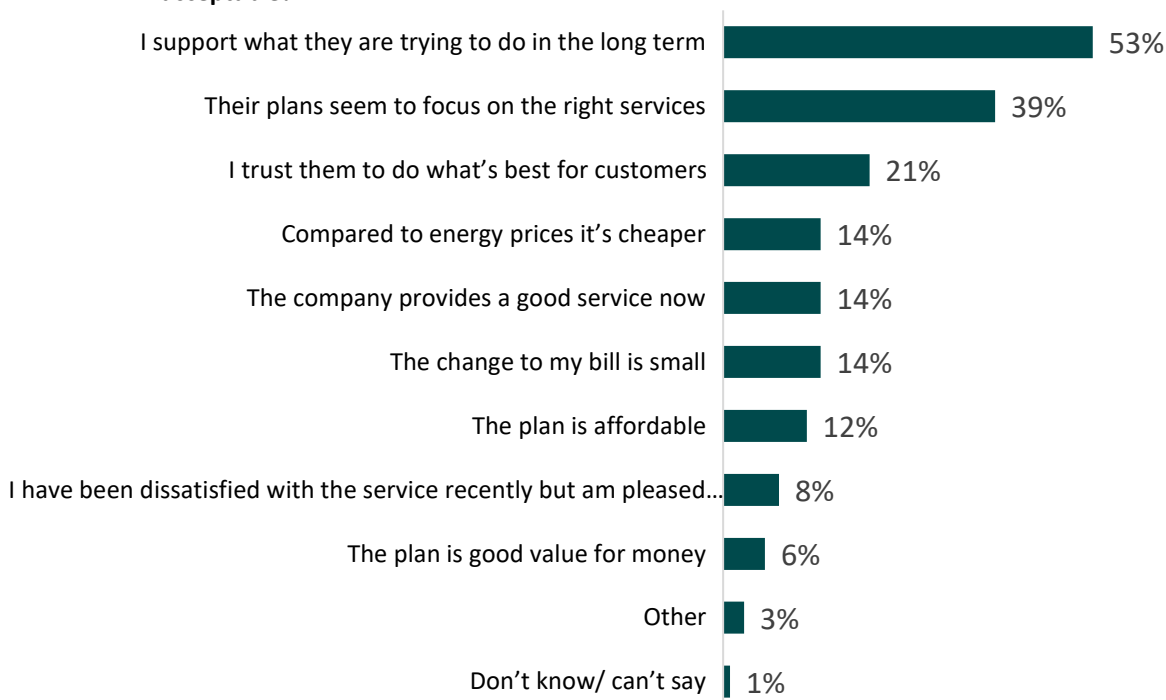


Base: All HH participants weighted base that felt proposals were unacceptable (236)

### Reasons for acceptability

65% of household customers found the plan acceptable. The top 3 reasons for finding the plan acceptable were: Customers supporting what Anglian Water are trying to do long term (53%), that Anglian Water's plans focus on the right services (39%) and trust that Anglian Water are doing what is best for their customers (21%).

**Figure 24. Q34 What are the two main reasons that you feel the proposals for your water supply are acceptable?**

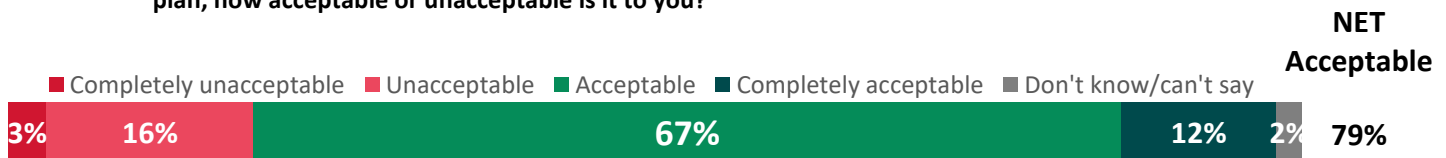


Base: All HH participants that felt proposals were acceptable (685)

## Non-household Acceptability

Acceptability is higher among the non-household population than the household. 79% of the businesses we spoke to, found the proposed business plan to be acceptable.

**Figure 25. Q32 Based on everything you have seen and read about Anglian Water' proposed business plan, how acceptable or unacceptable is it to you?**



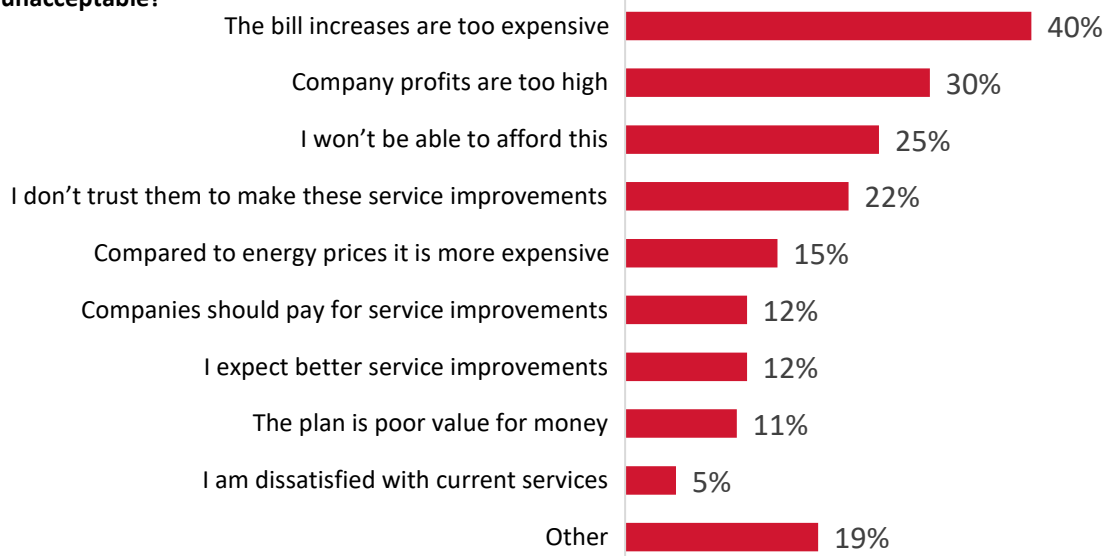
Base: All NHH participants weighted base (460)

## Reasons for unacceptability

19% of non-household participants found the proposed plan unacceptable. Just like for the household participants their responses were financially driven.

40% found the bill increase too expensive, 30% felt that company profits were too high and 25% felt won't be able to afford it.

**Figure 26. Q33 What are the two main reasons that you feel the proposals for your water services are unacceptable?**

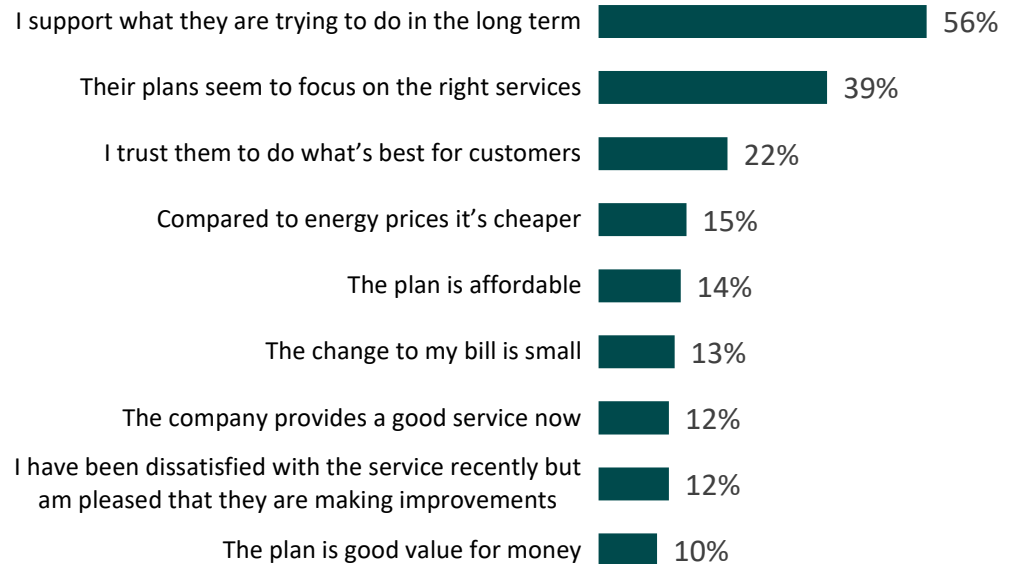


Base: All NHH participants weighted base that felt proposals were unacceptable (86)

## Reasons for acceptability

79% of businesses found the plan acceptable because they support what Anglian Water are trying to do long term (56%), feel the plan focuses on the right services (39%) and trust Anglian Water to do what is best for their customers (22%).

**Figure 27. Q34 What are the two main reasons that you feel the proposals for your water supply are acceptable?**



Base: All NHH participants weighted base that felt proposals were acceptable (363)

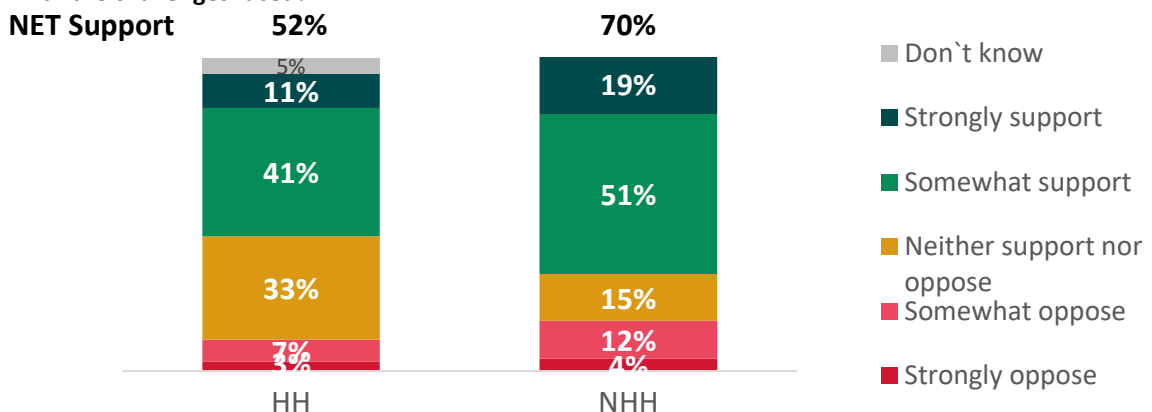
## 4.9 Support and Challenges

As part of the questions sitting outside the Guidance, customers were asked about support or opposition for Anglian Water's plans and challenges it is facing.

There has been a large positive response with over half (52%) of households supporting and only 10% opposing the plan.

The support was even higher among non-household customers with 70% saying they somewhat or strongly support Anglian opposed to only 16% that said they oppose them.

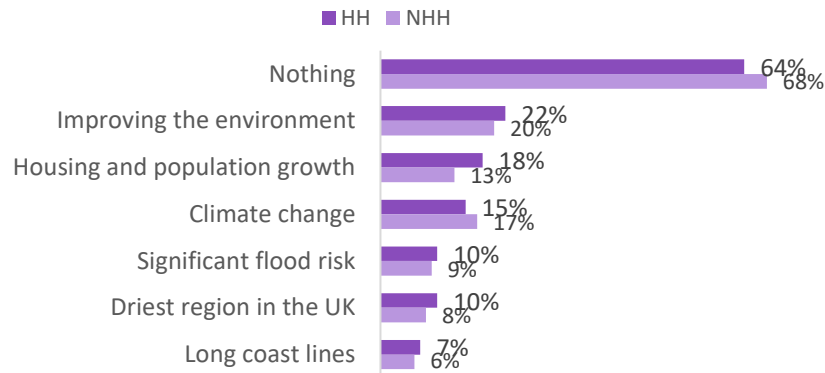
**Figure 28. Q34b How strongly do you support or oppose Anglian Water's plans and actions to deal with the challenges faced?**



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

Overall two thirds of Anglian Water customers did not oppose the plans, and the ones that did were split in the following way.

**Figure 29. 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**



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

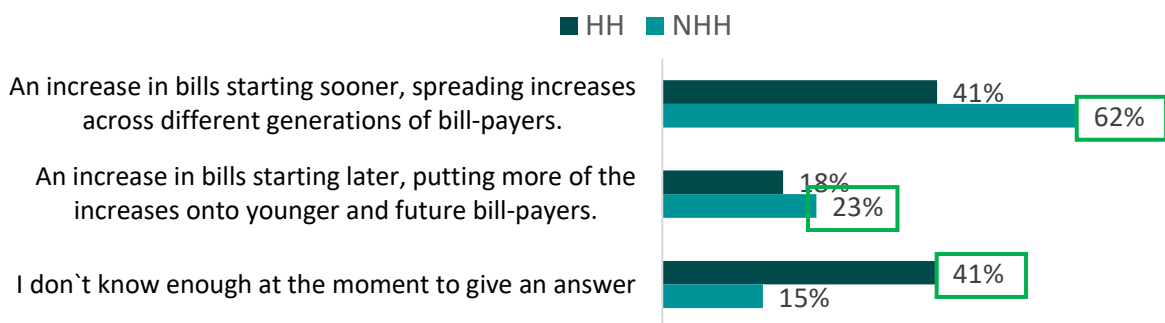
## 4.10 Intergenerational Phasing

Non households seem more reluctant than household customers for the price increases to be put onto future customers.


Just over 2 in 5 (41%) of households were unable or unwilling to answer the question (potentially indicating the difficulty of the choice in the current financial circumstances) compared with only 15% of businesses, a significant difference.

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

**Figure 30. Q35 Long term investment by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?**



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

 Denotes a significantly higher value

# APPENDIX A

Adherence to Ofwat's standards for high quality customer research

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

# APPENDIX B

Additional Information



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

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

# APPENDIX C

Limitations

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

# APPENDIX D

Fieldwork Materials

## Invitation letter – E&SW



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

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

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

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

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

**How to take part**

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



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

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

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

Yours faithfully

Rachel Risely on behalf of the study team

# Invitation letter – Hartlepool



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

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

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

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

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

### How to take part

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



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

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

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

Yours faithfully

Rachel Risely on behalf of the study team

# Invitation letter – DUAL supply area



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

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

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

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

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

**How to take part**

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



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

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

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

Yours faithfully

Rachel Risely on behalf of the study team

# Email invite

Dear <NAME>

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

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

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

## How to get involved

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

The survey closes on 4th of September 2023.

[Click here to check eligibility, and to take part.](#)

If you can't see or click the button above, please copy and paste this link into your browser:

[LINK](#)

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [LINK](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

## Any questions?

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

Kind regards,  
Rachel Risely and the Anglian Water team

This research is conducted under the terms of the Market Research Society code of conduct and is completely confidential. If you would like to confirm Accent's credentials please call the MRS free on 0800 975 9596.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society

Registered in London No. 2231083  
Accent Marketing & Research Limited  
Registered Address: 30 City Road, London, EC1Y 2AB

Accent is registered to the market, opinion and social research International Standard ISO 20252

If you do not want to receive further communication on this survey, please click here

[LINK](#)

If the above link(s) do not work please copy and paste to your address bar



# Reminder letter

Hello,

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

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

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

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

### **How to get involved**

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

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

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

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

Best wishes,

Rachel Risely on behalf of the study team

## **About this survey**

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

### **Q. What information will be shown in the survey?**

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

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

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

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

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

**Q. Why have I received this email?**

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

## Paper version cover - E&SW



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

### **Water services research: your requested survey**

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

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

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

### **How to take part**

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



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

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

Yours faithfully

Rachel Risely on behalf of the study team

## Paper version cover - Hartlepool



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

### **Water services research: your requested survey**

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

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

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

### **How to take part**

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



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

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

Yours faithfully

Rachel Risely on behalf of the study team

## Paper version cover – DUAL supply area



<Customer name>  
<Address>

3 Orchard Place  
London  
SW1H 0BF

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

Dear Sir/Madam

### **Water services research: your requested survey**

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

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

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

### **How to take part**

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



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

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

Yours faithfully

Rachel Risely on behalf of the study team

# APPENDIX E

Questionnaire (Online version)

## DUAL Supply area



### Affordability and Acceptability Testing

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

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

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

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

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

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

#### Q1. 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?

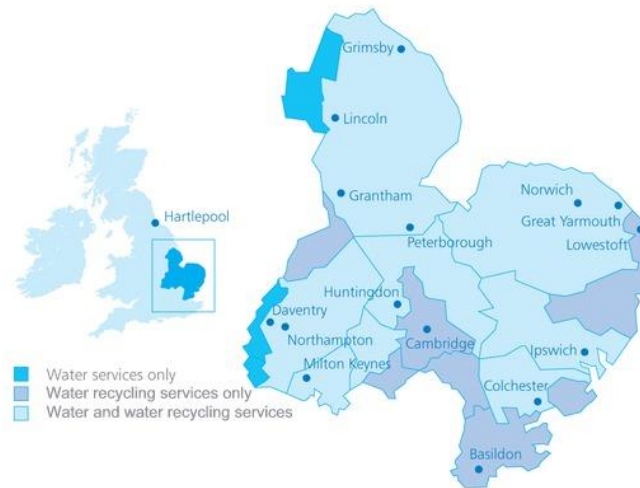
Yes

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**

## Q2. 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.

## Q3. 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

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


---

#### Q4. About Anglian Water

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


**DP – USE SLIDE 2**

## 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.

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

### Q5. 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

Range of tariffs	Temporary instalment plans	Payment breaks	Back on track schemes	Assistance fund
LITE	WaterSure		<b>£135 million</b> of direct support provided this year with plans to go further in the future.	 
Extra LITE	AquaCare Plus			

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

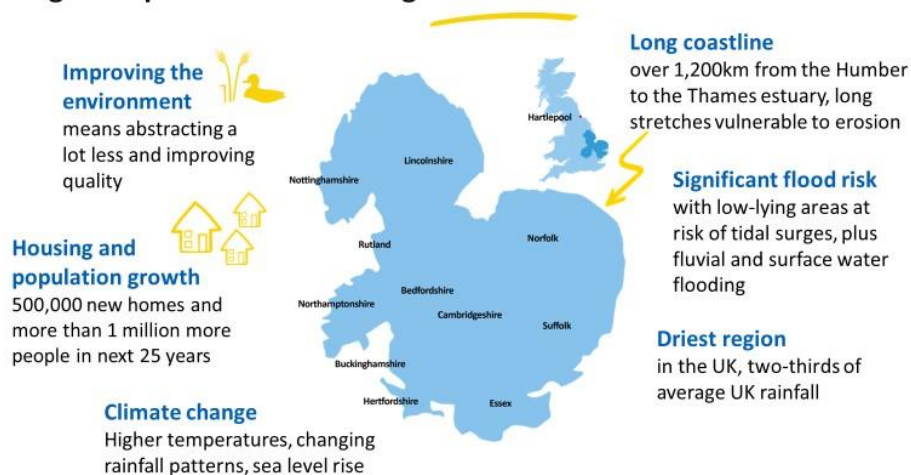
## Q6. Anglian Water's Plans

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

#### Long term picture: the challenges we face



DP PROGRAMME MINIMUM TIME LIMIT OF 4 SECONDS

## Q7. 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

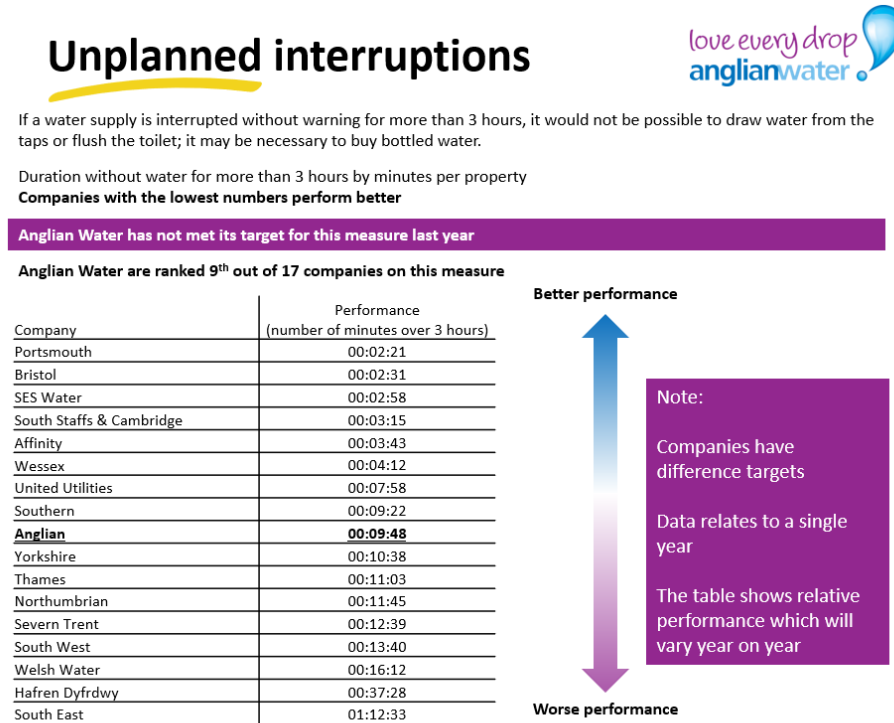
for that year. Note that water companies can have different targets, the data relates to a single year, and relative performance will change year on year.

- 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

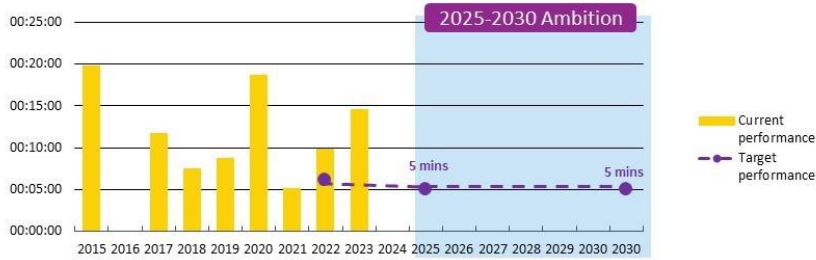


The next chart shows Anglian Water's proposed targets for reducing the length of time properties are without water on an average year.

# Unplanned interruptions



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



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

### How:

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

### Performance:

Interruptions have reduced by 26% since 2015

## 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

# Reducing leaks



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

Leakage per property per day.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5<sup>th</sup> out of 19 companies on this measure

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

Better performance

Worse performance

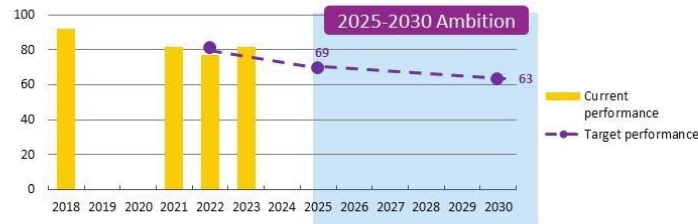
Note:  
Companies have difference targets  
Data relates to a single year  
The table shows relative performance which will vary year on year

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

## Reducing leaks



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



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

### How:

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

### Performance:

Leaks have reduced by 7% since 2018

## 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

## Appearance, taste and smell of tap water



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

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

Anglian Water met its target for this measure last year

Anglian Water are ranked 8<sup>th</sup> out of 17 companies on this measure

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

Better performance



Worse performance

Note:

Companies have different targets

Data relates to a single year

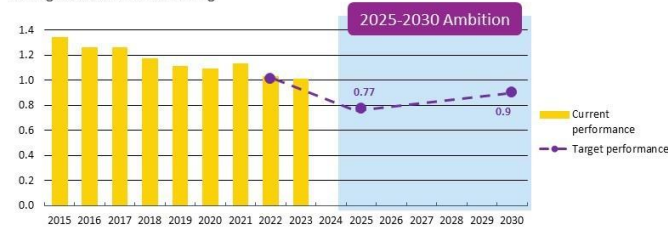
The table shows relative performance which will vary year on year

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

## Appearance, taste and smell of tap water



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



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

### How:

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

### Performance:

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

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

## Sewage flooding of properties



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

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

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

Anglian Water are ranked 5<sup>th</sup> out of 11 companies on this measure

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

Better performance



Worse performance

Note:

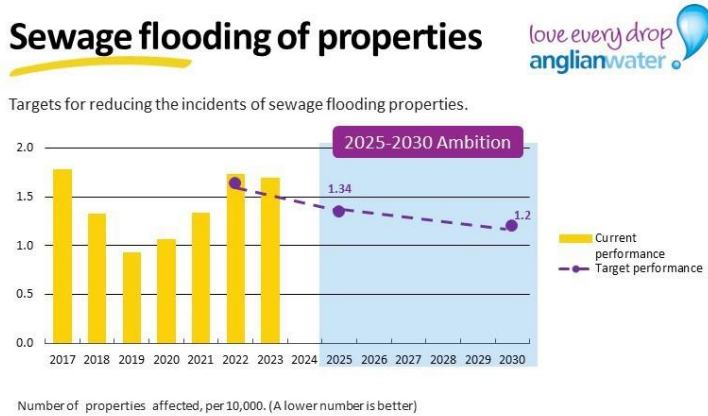
Companies have difference targets

Data relates to a single year

The table shows relative performance which will vary year on year



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



**How:**

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

**Performance:**

Flooding of properties has reduced by 5% since 2017

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

### Sewage flooding of gardens or outbuildings

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

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3<sup>rd</sup> out of 11 companies on this measure

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

Better performance

Worse performance

Note:

Companies have difference targets

Data relates to a single year

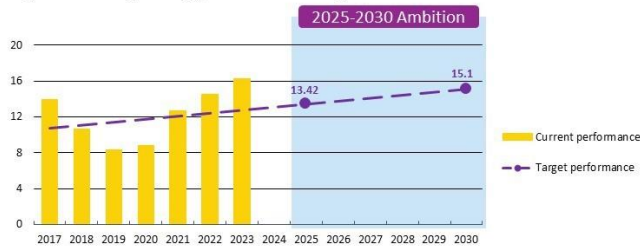
The table shows relative performance which will vary year on year

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

## Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



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

### How:

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

### Performance:

Flooding of outbuildings has increased by 17% since 2017

## 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

## Pollution incidents



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

Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

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

Anglian Water are ranked 8<sup>th</sup> out of 11 companies on this measure

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

Better performance



Worse performance

Note:

Companies have difference targets

Data relates to a single year

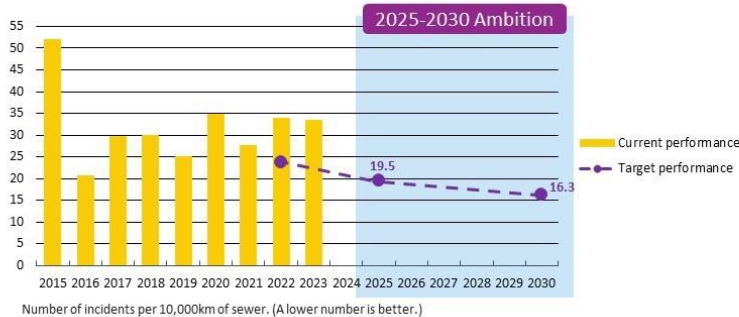
The table shows relative performance which will vary year on year

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

## Pollution incidents



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



### How:

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

### Performance:

Pollution has reduced by 36% since 2015

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 20<sup>th</sup> 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**

## Q8. 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.

**DP USE SLIDE 24**

## Financial Support Schemes



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

## Q9. 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.

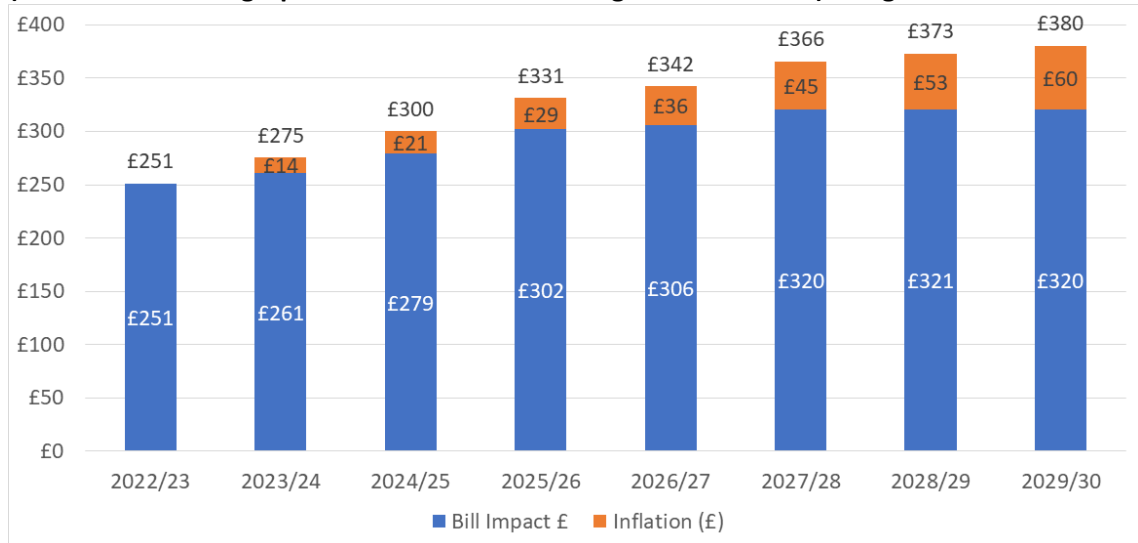
The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.



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:



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

#### Q10. 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 Q9=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 Q9=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)

## Q11. 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

## Q12. **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 \(anglianwater.co.uk\)](#)

---

**Q13. 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

#### Q14. 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

E&SW version



## Affordability and Acceptability Testing

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

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

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

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

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

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

### Q15. 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

---

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

Yes **GO TO MAIN QUESTIONNAIRE**  
No **THANK AND CLOSE**  
Don't know **GO TO MAIN QUESTIONNAIRE**

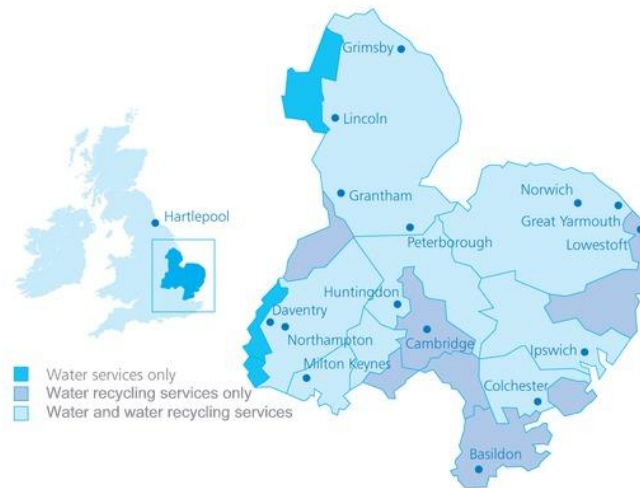
---

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

Yes  
No **THANK AND CLOSE**

---

Q33. **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**

## Q16. 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.

## Q17. 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 sewerage services bill, each year?

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

Q13. How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

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

---

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

---

## Q18. 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


### Q19. 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



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.

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

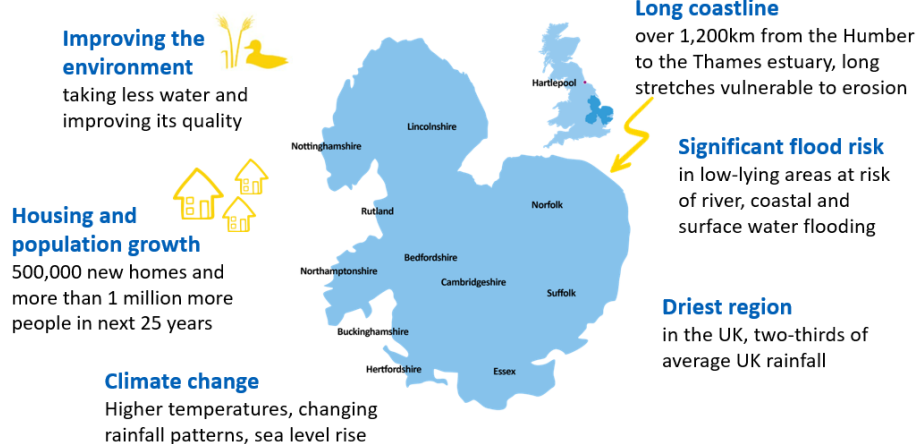
## Q20. Anglian Water's Plans

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

#### Long term picture: the challenges we face



DP PROGRAMME MINIMUM TIME LIMIT OF 4 SECONDS

## Q21. 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 business plan objectives. We are now going to show you Anglian Water's plans in three areas related to sewerage services:

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

For each performance commitment we will show you 2 slides:

- The first shows Anglian Water's current performance against other waste water companies in England and Wales. This will also indicate whether Anglian Water met their target for that year. Note that waste 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.

Q17.

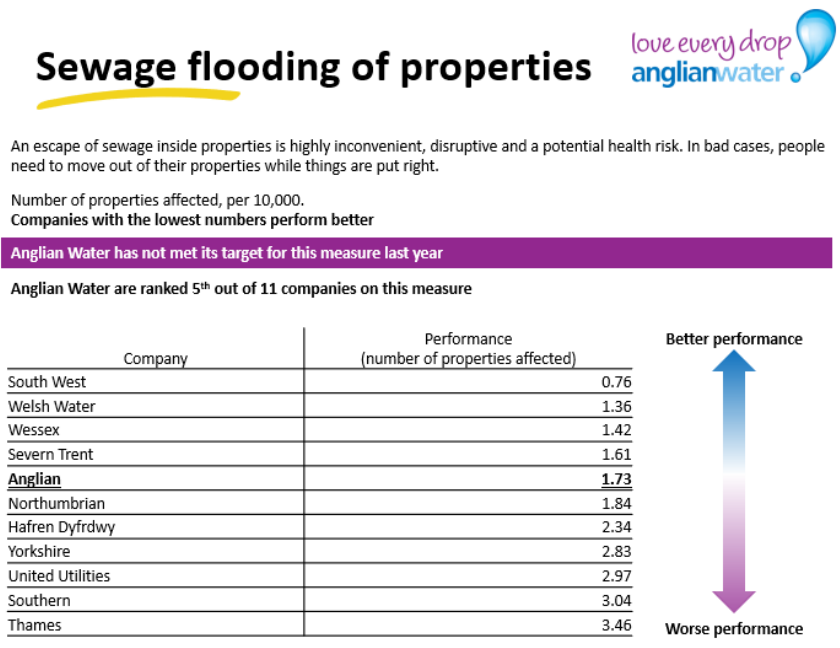
Q18.

Q19.

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

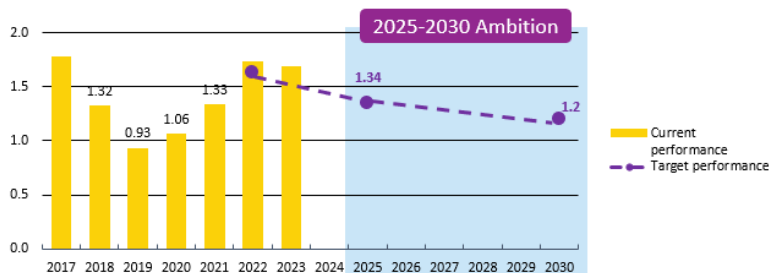


The next chart shows Anglian Water's proposed targets for reducing the number of incidents of sewage flooding of properties.

## Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



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

### How:

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

### Performance:

Flooding of properties has reduced by 5% since 2017

## 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

## Sewage flooding of gardens or outbuildings



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

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

Anglian Water met its target for this measure last year

Anglian Water are ranked 3<sup>rd</sup> out of 11 companies on this measure

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

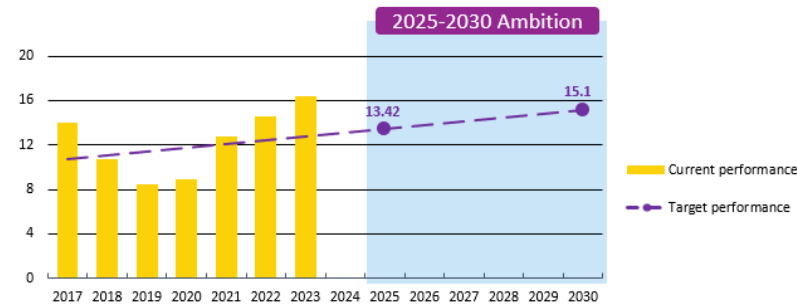


The next chart shows Anglian Water’s proposed targets for reducing the number of incidents of sewage flooding of gardens and outbuildings.

## Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



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

### How:

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

### Performance:

Flooding of outbuildings has increased by 17% since 2017

## 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

## Pollution incidents



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

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

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

Anglian Water are ranked 8<sup>th</sup> out of 11 companies on this measure

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

Better performance



Worse performance

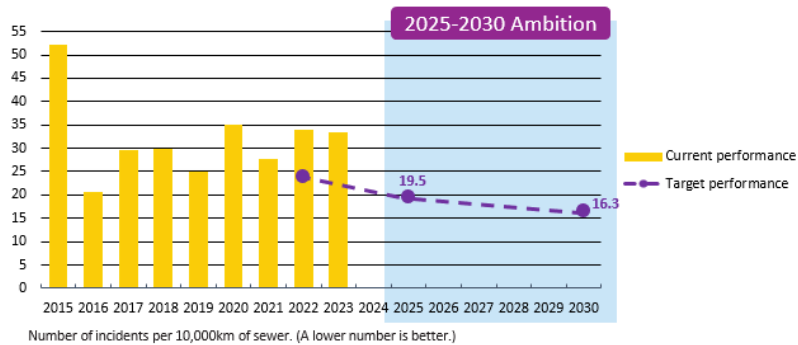
The next chart shows Anglian Water's proposed targets for reducing the number of pollution incidents.



## Pollution incidents



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



### How:

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

### Performance:

Pollution has reduced by 36% since 2015

## DP programme minimum time limit of 15 seconds

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 three of the key areas of investment in Anglian Water's business plan before asking for your views on the plan as a whole.

Anglian Water proposes investing £2,052 billion in these three areas over the five years from 2025 to 2030.

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

**DP – USE**  
**slide 18**

## 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



DP programme minimum time limit of 15 seconds

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

**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**

## Q22. 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.

DP USE SLIDE 24

## Financial Support Schemes



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.**



DP programme minimum time limit of 5 seconds

How acceptable or unacceptable do you find these plans:

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

**Q23. 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 £311 per year (**£0.85 per day**) for waste only services

The total average household bill in the period from 2025-2030 will be or £309 per year (**£0.85 per day**) 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.*

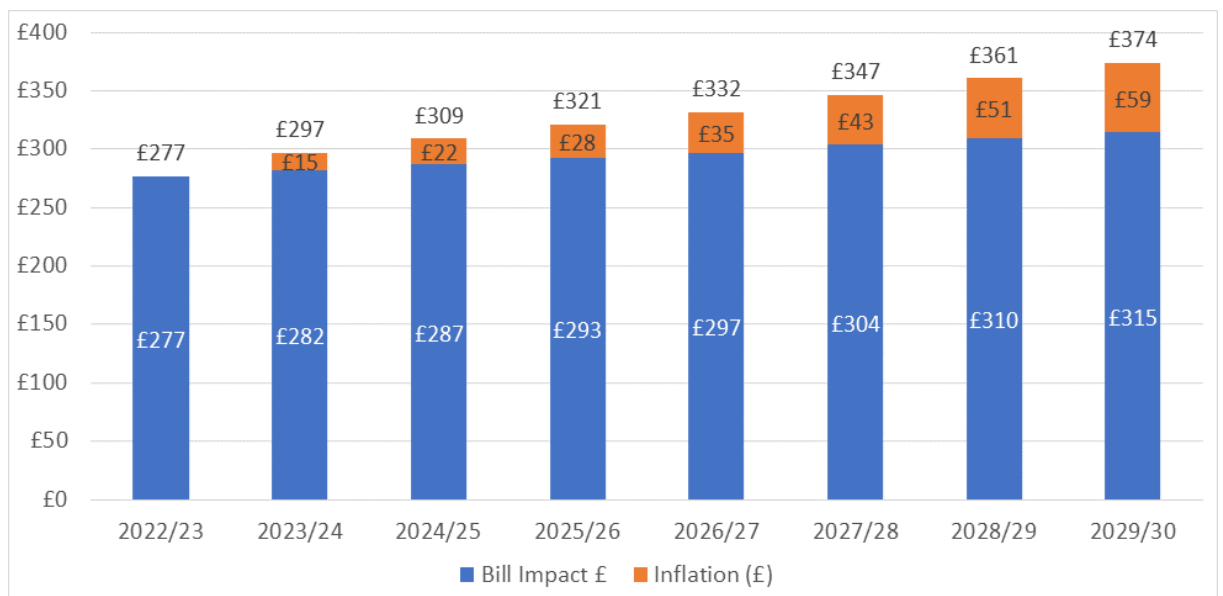
The following chart shows the expected increase in your **water and sewerage** bill over the next few years.

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:**



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

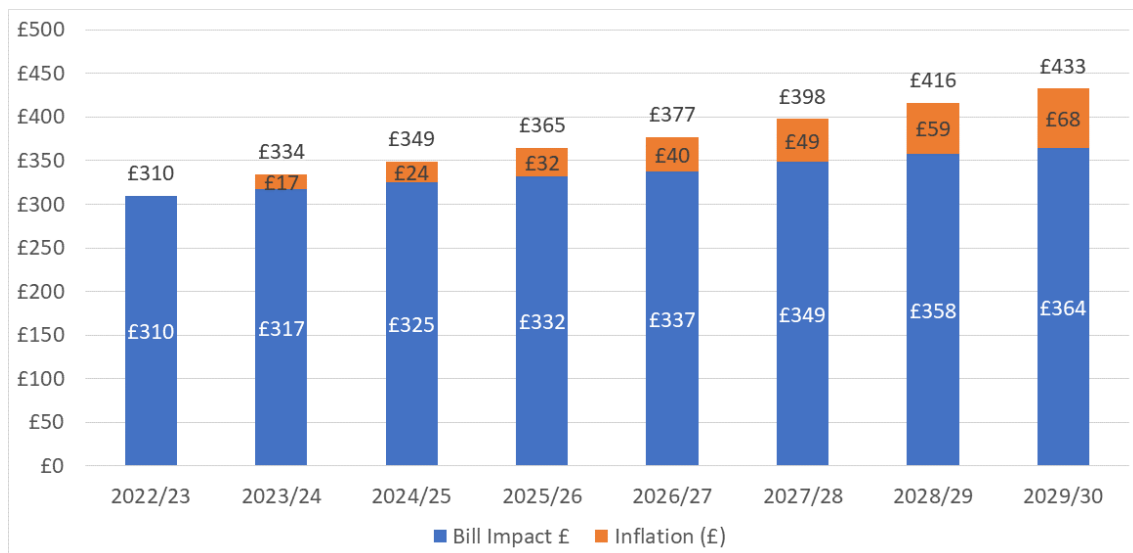
Q15. [IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

- 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'**



Q15b. The next chart shows the expected increase in the **sewerage only component** of your bill over the next few years. This reflects the changes in plan highlights

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

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

INSERT SINGLE SERVICE BILL.

**IF NHH USE 49.88% OF #Q12# AS CURRENT BILL (CELL C14 IN CALCULATOR)**

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

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

**[IF HH]** How easy or difficult do you think it would be for you to afford these sewerage bills?

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

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

**DP PLEASE ADD TIMESTAMP**

#### Q24. Acceptability of the Anglian Water's plans

Q34. 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 Q9=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 Q9=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? **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** Please 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)

## **Q25. 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



**Q26. 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 QINCENTIVE**

---

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 \(anglianwater.co.uk\)](http://Extra Care Support (anglianwater.co.uk))

## Q27. 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

## Q28. 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

## Hartlepool version



# Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Anglian Water, your water 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.**

### Q29. Scoping questions

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

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

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

Yes

No **THANK AND CLOSE**

---

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

Yes **THANK & CLOSE**

No

---

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

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

Prefer not to say **THANK AND CLOSE**

**CODE AS** Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

---

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

Yes

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

Don't know **THANK AND CLOSE**

---

Are you currently charged for water through a water meter?

Yes

No

Don't know

---

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

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

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

---

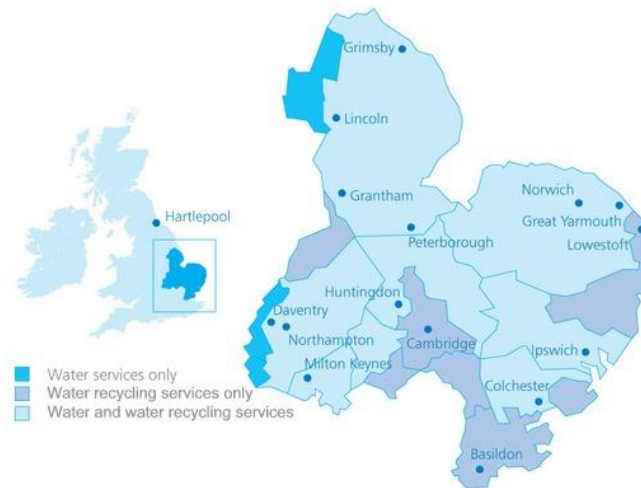
**IF NHH:** Are you solely or jointly responsible as the decision maker for your site's water service at any of its premises?

Yes

No **THANK AND CLOSE**

---

Q35. **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**

### Q30. 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.

## Q31. 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 sewerage services bill, each year?

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

Q13. How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

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

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

## Q32. About Anglian Water

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

DP – USE

SLIDE 2

**About Anglian Water**

love every drop  
anglianwater

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

## Q33. 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 | WaterSure | **£135 million** of direct support provided this year with plans to go further in the future. | bsl | Make Today Great

Extra LITE | AquaCare Plus

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?

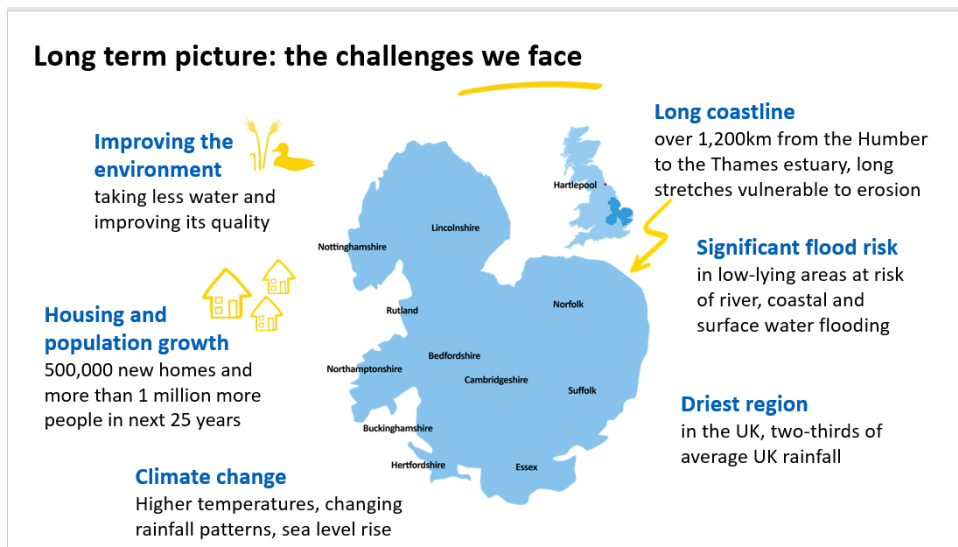
- Very familiar
- Quite familiar
- Not very familiar
- Not at all familiar

**Q34. 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 SECONDS**

### Q35. 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 business plan objectives. We are now going to show you Anglian Water's plans in three areas that relate to clean water services:

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

For each performance commitment we will show you 2 slides:

- The first shows Anglian Water's current performance against other 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**

## Unplanned interruptions



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

Duration without water for more than 3 hours by minutes per property  
Companies with the lowest numbers perform better

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

Anglian Water are ranked 9<sup>th</sup> out of 17 companies on this measure

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

Better performance

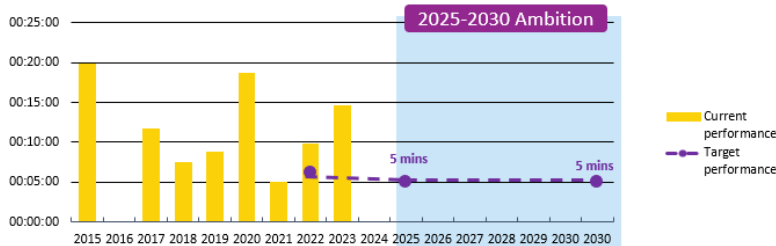
Worse performance

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

## Unplanned interruptions



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



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

### How:

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

### Performance:

Interruptions have reduced by 26% since 2015

## 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

## Reducing leaks



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

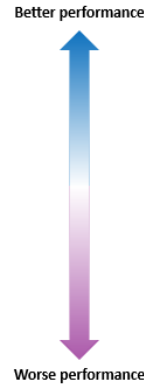
Leakage per property per day.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5<sup>th</sup> out of 19 companies on this measure

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

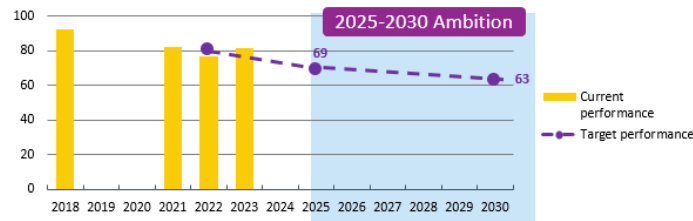


The next chart shows what Anglian Water’s proposed targets for reducing leakage.

## Reducing leaks



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



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

### How:

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

### Performance:

Leaks have reduced by 7% since 2018

## 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

## Appearance, taste and smell of tap water



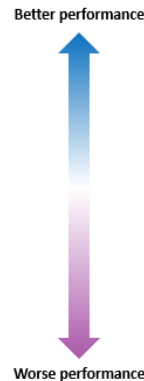
Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

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

Anglian Water met its target for this measure last year

Anglian Water are ranked 8<sup>th</sup> out of 17 companies on this measure

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

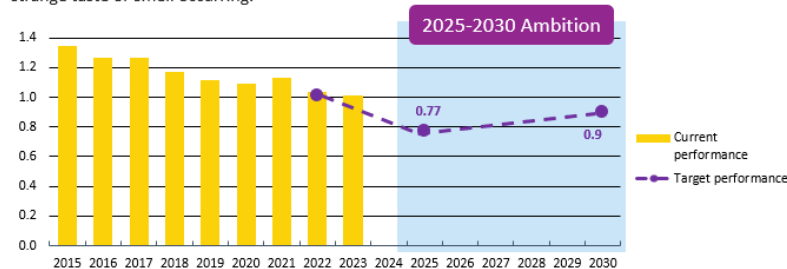


The next chart shows Anglian Water's proposed targets for reducing the number of customer contacts in relation to water quality.

## Appearance, taste and smell of tap water



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



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

### How:

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

### Performance:

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

DP PROGRAMME MINIMUM TIME LIMIT OF 15 SECONDS

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**

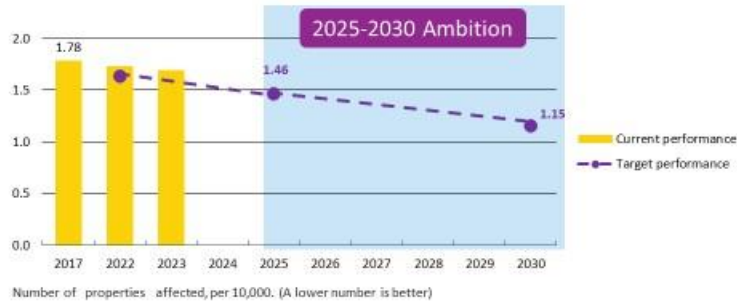
Please select one answer only

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

## Sewage flooding of properties

Targets for reducing the incidents of sewage flooding properties:



### How:

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

### Performance:

Anglian is close to the best performer in the industry and has been for many years.

Q21.

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

Anglian Water proposes investing £1,894 in these three areas over the five years from 2025 to 2030.

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

DP – USE  
 slide 21

### 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 20<sup>th</sup> 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



**£303m over five years to 2030**  
An average customer would pay a total of £323.30 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)

### DP PROGRAMME MINIMUM TIME LIMIT OF 15 SECONDS

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

**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**

## Q36. 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.

**DP USE SLIDE 24**

## Financial Support Schemes



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

**DP PROGRAMME MINIMUM TIME LIMIT OF 5 SECONDS**

### Q37. 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 £286 per year (**£0.78 per day**) for water only services.

The total average household bill in the period from 2025-2030 will be or £286 per year (**£0.78 per day**) water 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.*

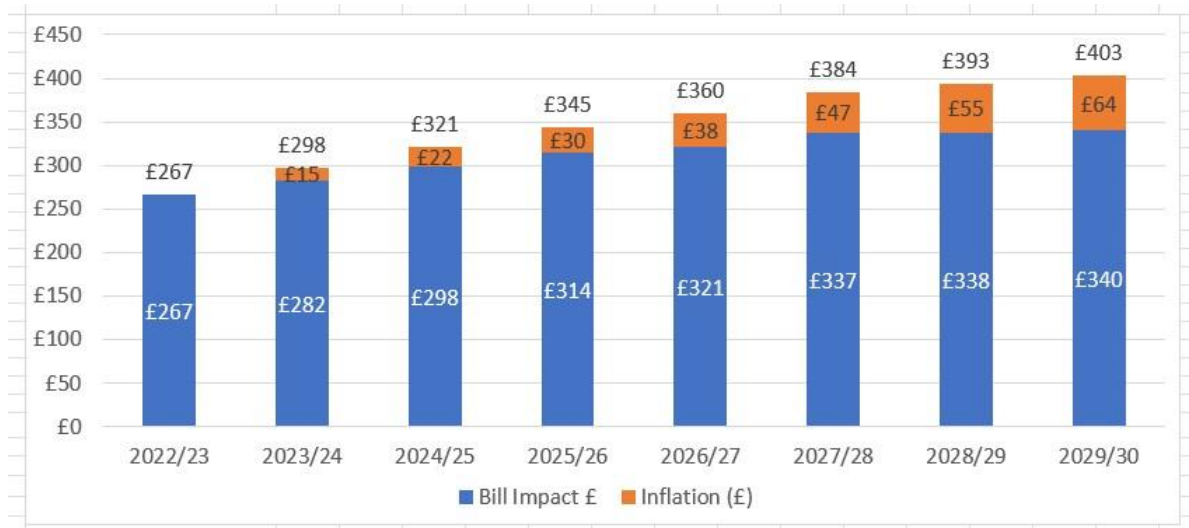
The following chart shows the expected increase in your **water and sewerage** bill over the next few years.

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:**



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 Q12 = ‘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 & Q12 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 & Q12 = 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 Q15**
- Fairly difficult **HH ONLY GO TO Q15**
- Very difficult **HH ONLY GO TO Q15**
- Don’t know

Q15. **[IF HH ONLY]** IF Q14= 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'**

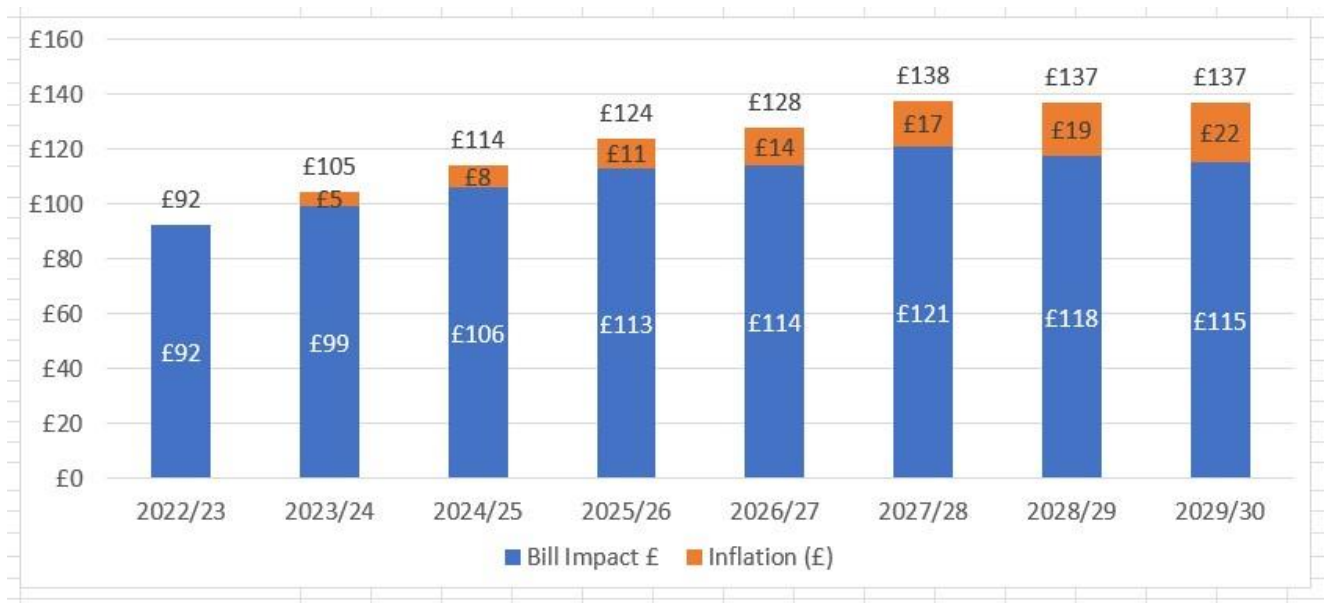
Q15b. The next chart shows the expected increase in the **water only component** of your bill over the next few years. This reflects the changes in plan highlights

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

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

INSERT SINGLE SERVICE BILL.

**(Placeholder – this graph will be tailored according to bill amounts) using:  
using single service table**



**NHH USE 51.22% OF #Q12# (CELL C14 IN CALCULATOR)**

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

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

**[IF HH]** How easy or difficult do you think it would be for you to afford these water bills? **[IF NHH & Q12 IS NOT D/K]** How easy or difficult do you think it would be for your company/organisation to afford these water bills? **[IF NHH & Q12 = D/K]** How easy or difficult do you think it would be for your organisation to afford its water bills if they went up at the same rate? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

**DP PLEASE ADD TIMESTAMP**

**Q38. Acceptability of the Anglian Water's plans**

Q36. 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 Q32=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 Q32=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? **HOVER OVER – USE SLIDE 4 FROM Q13b**  
**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** Please 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)

### Q39. 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

### Q40. **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 \(anglianwater.co.uk\)](#)

## Q41. 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

## Q42. 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

# APPENDIX F

Questionnaire (Paper version – example)

## Dual supply area version



# Affordability and Acceptability Testing

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

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

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

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

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

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

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

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

## Q43. 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 you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q37. Do you or any of your close family work in market research or for a water company?

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

No

---

Q38. How old are you? Please enter your age.

Please enter your age on the line below

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

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

---

Q39. Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

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

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

---

Q40. Are you currently charged for water through a water meter?

Yes

No

Don't know

---

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

Yes

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

Don't know

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

## Q44. Main Questionnaire

## Q45. Affordability

We are now going to ask you some questions about your household's financial situation.

---

Q41. Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

***Please select one answer only***

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

---

Q42. Overall, how well would you say you are managing financially now?

***Please select one answer only***

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

---

Q43. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

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

---

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

***Please select one answer only***

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say




Don't know

## Q46. About Anglian Water




### 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.


Q10b. Please take a look at the following information about Anglian Water.

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



## Q47. Supporting Customers in Vulnerable Situations

Q10c. 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



### Supporting customers

Range of tariffs	Temporary instalment plans	Payment breaks	Back on track schemes	Assistance fund
LITE Extra LITE	WaterSure AquaCare Plus			<b>£135 million</b> of direct support provided this year with plans to go further in the future.



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.

bills over a manageable period.

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

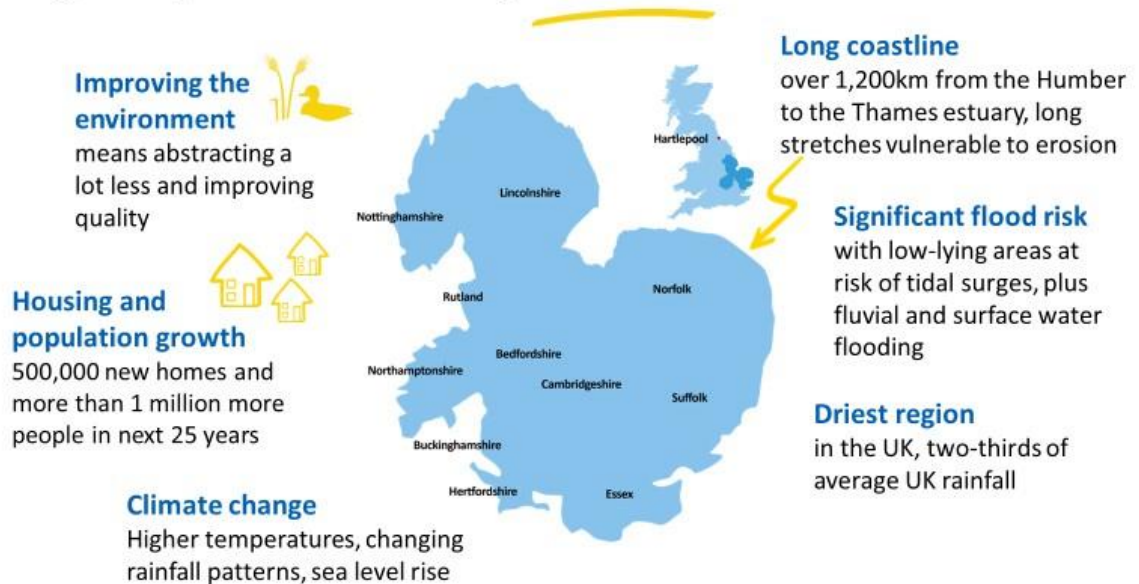
- Very familiar
- Quite familiar
- Not very familiar
- Not at all familiar

## Q48. Anglian Water's Plans

Q10d. 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:

### Long term picture: the challenges we face



## Q49. 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:

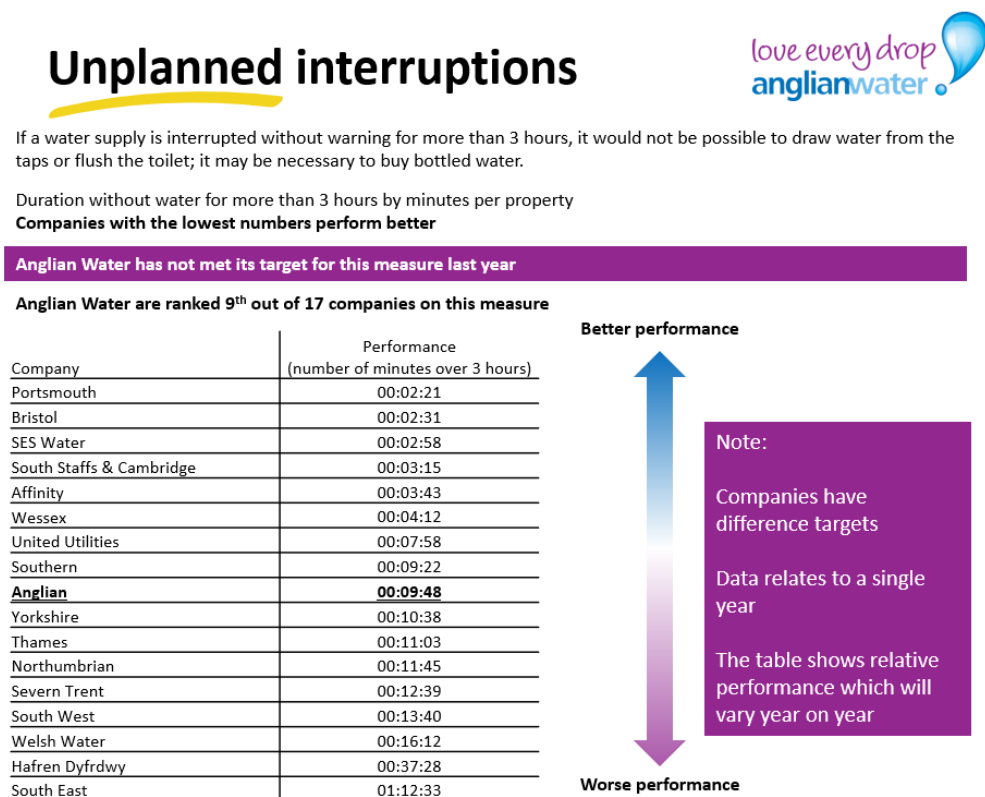
- Appearance, taste and smell of tap water
- Leakage
- Unplanned water supply interruptions
- Sewage flooding of properties
- Sewage flooding of gardens or outbuildings
- Pollution incidents

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.

### 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



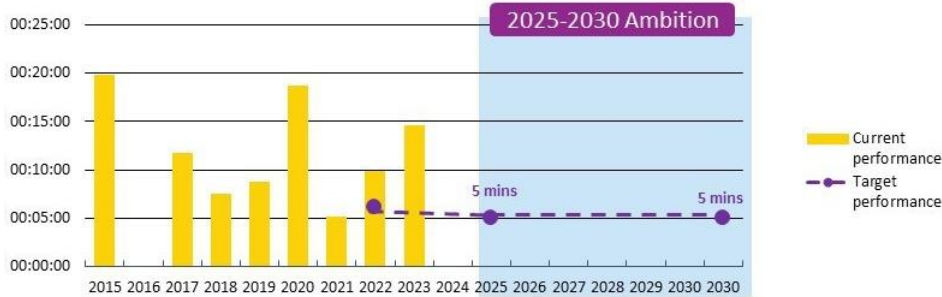
the other water companies.

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

# Unplanned interruptions



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



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

## How:

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

## Performance:

Interruptions have reduced by 26% since 2015

## 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.

# Reducing leaks



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

Leakage per property per day.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 5<sup>th</sup> out of 19 companies on this measure

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

Better performance



Worse performance

Note:

Companies have difference targets

Data relates to a single year

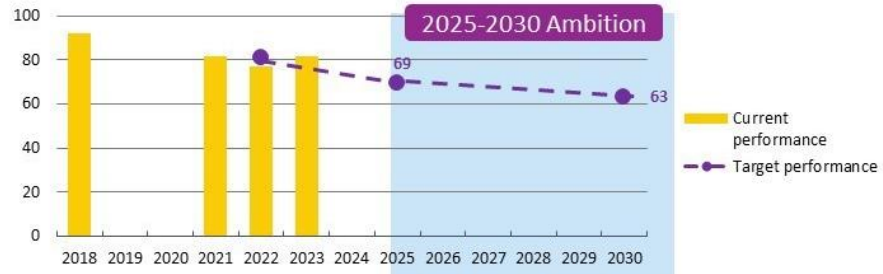
The table shows relative performance which will vary year on year

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

## Reducing leaks



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



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

### How:

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

### Performance:

Leaks have reduced by 7% since 2018

## Water Quality Contacts

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

## Appearance, taste and smell of tap water



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

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

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 8<sup>th</sup> out of 17 companies on this measure

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

Better performance



Worse performance

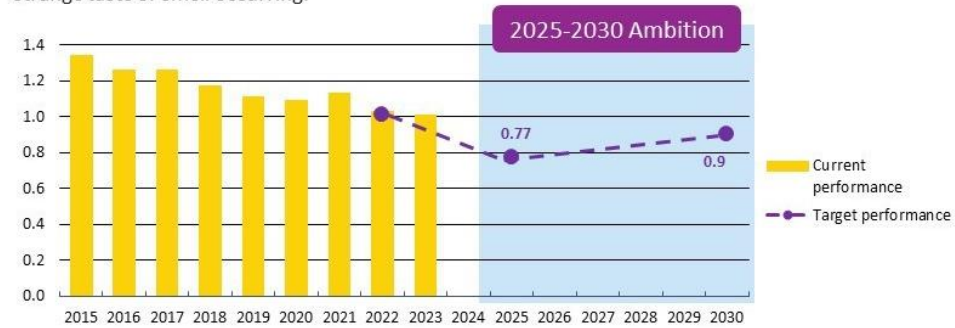
Note:  
Companies have difference targets  
Data relates to a single year  
The table shows relative performance which will vary year on year

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

## Appearance, taste and smell of tap water



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



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

### How:

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

### Performance:

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

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

**Please select one answer only**

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

## Internal Sewer Flooding

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

# Sewage flooding of properties



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

Number of properties affected, per 10,000.

**Companies with the lowest numbers perform better**

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

**Anglian Water are ranked 5<sup>th</sup> out of 11 companies on this measure**

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

Better performance



Worse performance

Note:

Companies have difference targets

Data relates to a single year

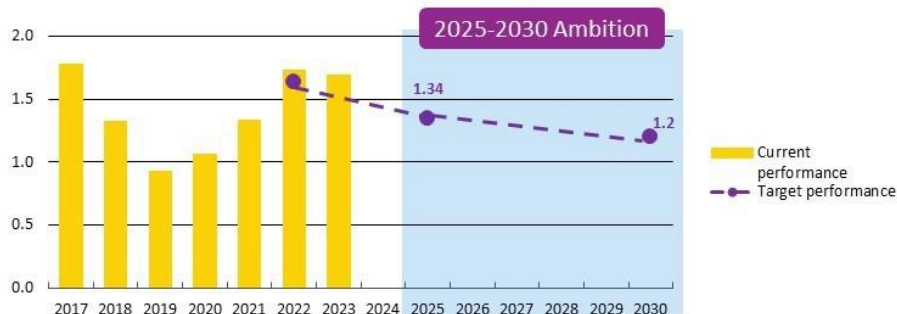
The table shows relative performance which will vary year on year

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

# Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



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

## How:

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

## Performance:

Flooding of properties has reduced by 5% since 2017

## External Sewer Flooding

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

### Sewage flooding of gardens or outbuildings



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

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3<sup>rd</sup> out of 11 companies on this measure

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

Better performance



Worse performance

Note:  
Companies have different targets  
Data relates to a single year  
The table shows relative performance which will vary year on year

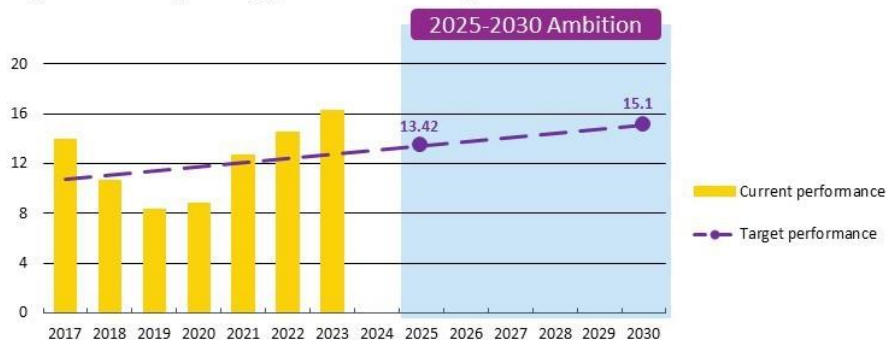
companies.

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

### Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



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

#### How:

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

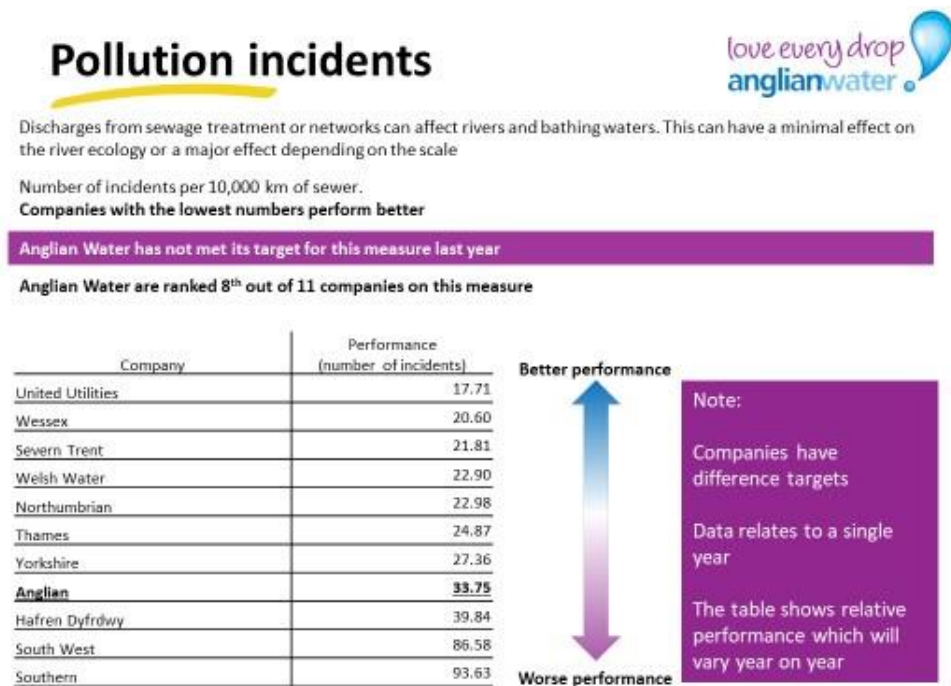
#### Performance:

Flooding of outbuildings has increased by 17% since 2017



## Pollution Incidents

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



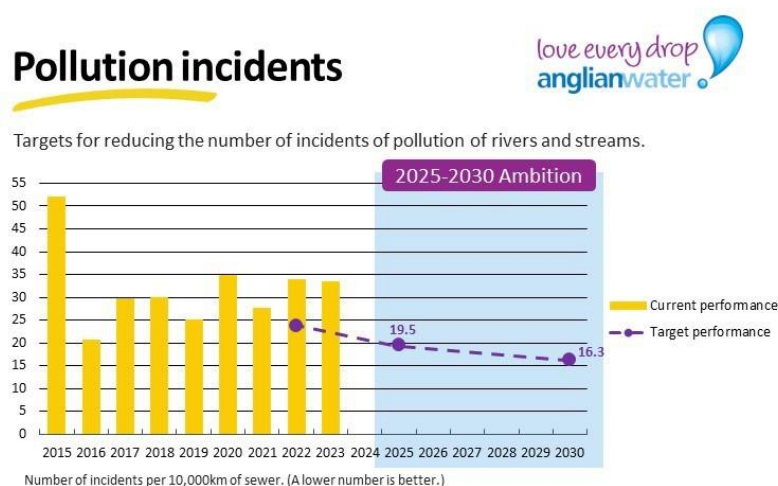
companies.

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

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

**Please select one answer only**

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



#### How:

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

#### Performance:

Pollution has reduced by 36% since 2015

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

Anglian Water proposes investing £3,946 billion in these six areas over the five years from 2025 to 2030.

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

### Improving drinking water quality




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

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

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

### Climate resilience and net zero




**£459m over five years to 2030**  
An average customer would pay a total of £488.91 extra on their bill over five years

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

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

**Balancing water supply and demand**

**£1.225bn over five years to 2030**  
An average customer would pay a total of £1,354.48 extra on their bill over five years



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

---

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

***Please select one answer only***

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

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

## Managing the impact of Growth



**£260m over five years to 2030**

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

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

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

## Environmental ambition



**£1.199bn over five years to 2030**

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

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

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

## Reducing spills

### £593m over five years to 2030

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

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



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

**Please select one answer only**

- Reducing spills
- Environmental ambition
- Managing growth

## Q50. Plans to support customers

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.

## Financial Support Schemes



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

## Q51. Proposed changes to your water/sewerage bill for the years 2025-2030.

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 £558 per year (**£1.53 per day**) for water and sewage services.

Based on this high level plan, how acceptable or unacceptable do you find Anglian Water's focus for 2025-2030?

**Please select one answer only**

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

---

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

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

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

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



---

Q44. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

**Please select one answer only**

- Very easy **Please skip question 25**
- Fairly easy **Please skip question 25**
- Neither easy nor difficult **Please go to Question 25**
- Fairly difficult **Please go to Question 25**
- Very difficult **Please go to Question 25**
- Don't know

---

Q45. **Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 24 (Q24 above)**

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

**Please select all that apply**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify:

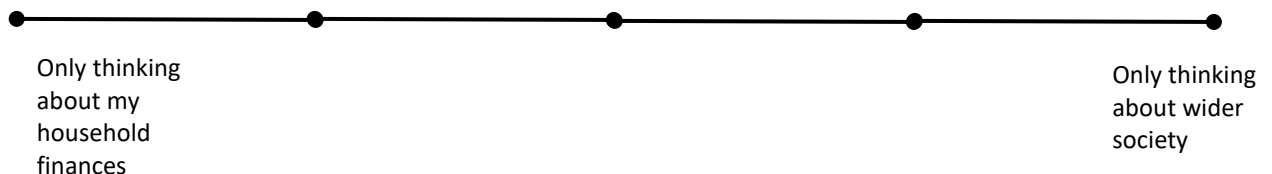
---

Don't know

---

Q25b. Thinking about the two previous questions, how much did you base your responses on the impacts of the proposed bills on your personal household and wider society?

**Please indicate the point of the scale below that reflects your view**



## Q52. Acceptability of Anglian Water's plans

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you?

**Please select one answer only**

- Completely acceptable **Please go to Question Q28**
- Acceptable **Please go to Question Q28**



- Unacceptable **Please go to Question Q27**
- Completely unacceptable **Please go to Question Q27**
- Don't know/can't say

---

**Q46. Answer if you selected “Unacceptable” or “Completely unacceptable” at question 26 (Q26 above)**

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

***Please choose up to two answers only***

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q47. Answer if you selected “Acceptable” or “Completely acceptable” at question 26 (Q26 above)**

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

***Please choose up to two answers only***

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q28b How strongly do you support or oppose Anglian Water's plans and actions to deal with the challenges faced?**

***Please select one answer only***

- Strongly support
- Somewhat support
- Neither support nor oppose

- Somewhat oppose
- Strong oppose
- Don't know

---

Q28c 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.

Improving the environment

Long coast lines

Significant flood risk

Driest region in the UK

Climate change

Housing and population growth

## Q53. 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?

***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

## Q54. Household Demographic

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

---

In which of the following ways do you identify?

***Please select one answer only***

- Female
- Male
- I identify in another way
- Prefer not to say

---

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

***Please select one answer only***

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q32**
- Student
- Prefer not to say

---

**Q48. Answer if you have selected “retired” at question 31 (Q31 above)**

Does the main income earner have a state pension, a private pension or both?

***Please select one answer only***

- State only
- Private only **Please go to Question Q33**
- Both **Please go to Question Q33**
- Prefer not to say

---

**Q49. Answer if you have selected “private only” or “both” at question 32 (Q32 above)**

How would you describe the main income earner's occupation type before retirement?

***Please select one answer only***

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed

- Student
- None of these
- Prefer not to say

---

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

***Please select all that apply***

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

---

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

***Please select one answer only***

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**OTHER ETHNIC GROUP**

- Arab
- Any other ethnic group
- Prefer not to say

---

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

***Please select one answer only***

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

---

Q36b. Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here: <https://www.anglianwater.co.uk/help-and-advice/water-care/extra-care-support/>

## Q55. Thank you

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

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

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

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

---

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

- Yes
- No

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

E&SW version



## Affordability and Acceptability Testing

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

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

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

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

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

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

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

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

## Q56. 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 you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q50. Do you or any of your close family work in market research or for a water company?

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

No

---

Q51. How old are you? Please enter your age.

Please enter your age on the line below

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

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

---

Q52. Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

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

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

---

Q53. Are you currently charged for water through a water meter?

Yes

No

Don't know

---

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

Yes

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

Don't know

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

## Q57. Main Questionnaire

## Q58. Affordability

We are now going to ask you some questions about your household's financial situation.

---

Q54. Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

***Please select one answer only***

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

---

Q55. Overall, how well would you say you are managing financially now?

***Please select one answer only***

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

---

Q56. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

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

---

Q57. Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

***Please select one answer only***

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say



Don't know

## Q59. About Anglian Water

### 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.

Q10b. Please take a look at the following information about Anglian Water.

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

## Q60. Supporting Customers in Vulnerable Situations

Q10c. 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

### Supporting customers

Range of tariffs	Temporary instalment plans	Payment breaks	Back on track schemes	Assistance fund
LITE	WaterSure		<b>£135 million</b> of direct support provided this year with plans to go further in the future.	
Extra LITE	AquaCare Plus			

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.

bills over a manageable period.

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

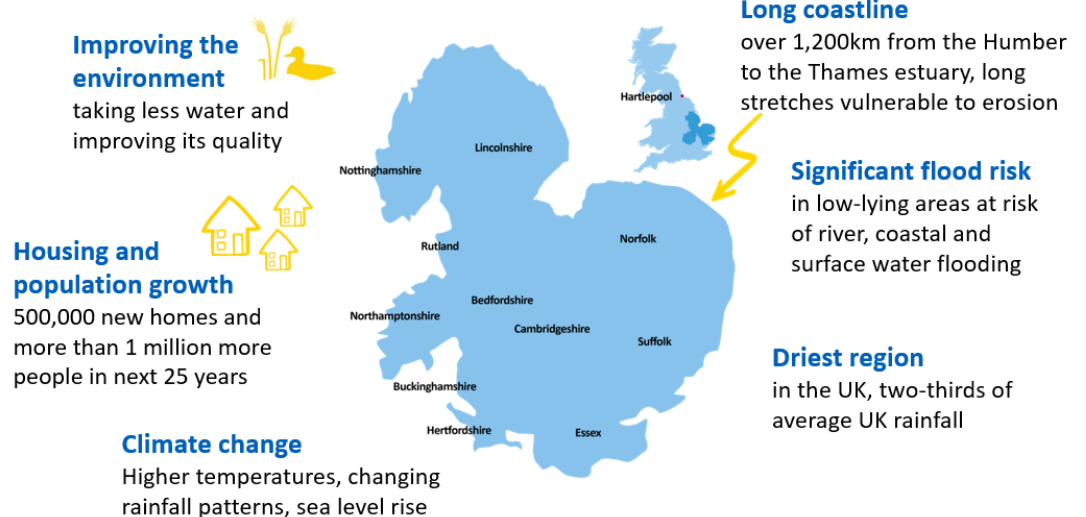
- Very familiar
- Quite familiar
- Not very familiar
- Not at all familiar

## Q61. Anglian Water's Plans

Q10d. 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:

### Long term picture: the challenges we face



## Q62. 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 business plan objectives. We are now going to show you Anglian Water's plans in three areas related to sewerage services:

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

- Pollution incidents

For each performance commitment we will show you 2 slides:

- The first shows Anglian Water’s current performance against other waste water companies in England and Wales. This will also indicate whether Anglian Water met their target for that year. Note that waste 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.

### Internal Sewer Flooding

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

## Sewage flooding of properties



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

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

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

Anglian Water are ranked 5<sup>th</sup> out of 11 companies on this measure

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

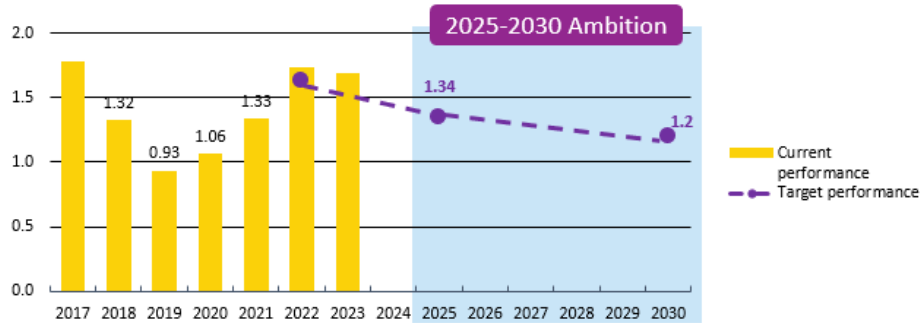


The next chart shows Anglian Water's proposed targets for reducing the number of incidents of sewage flooding of properties.

## Sewage flooding of properties



Targets for reducing the incidents of sewage flooding properties.



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

### How:

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

### Performance:

Flooding of properties has reduced by 5% since 2017

## External Sewer Flooding

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

## Sewage flooding of gardens or outbuildings



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

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Anglian Water met its target for this measure last year

Anglian Water are ranked 3<sup>rd</sup> out of 11 companies on this measure

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

Better performance



Worse performance

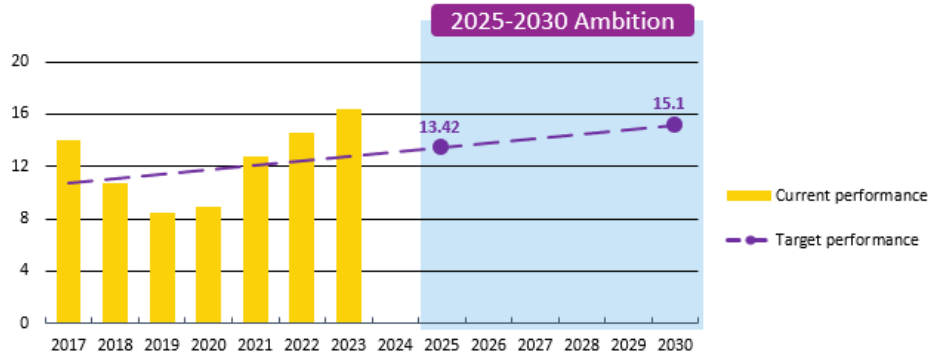
companies.

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

## Sewage flooding of gardens or outbuildings



Targets for reducing flooding gardens or outbuildings.



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

### How:

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

### Performance:

Flooding of outbuildings has increased by 17% since 2017

## Pollution Incidents

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

## Pollution incidents



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

Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

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

Anglian Water are ranked 8<sup>th</sup> out of 11 companies on this measure

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

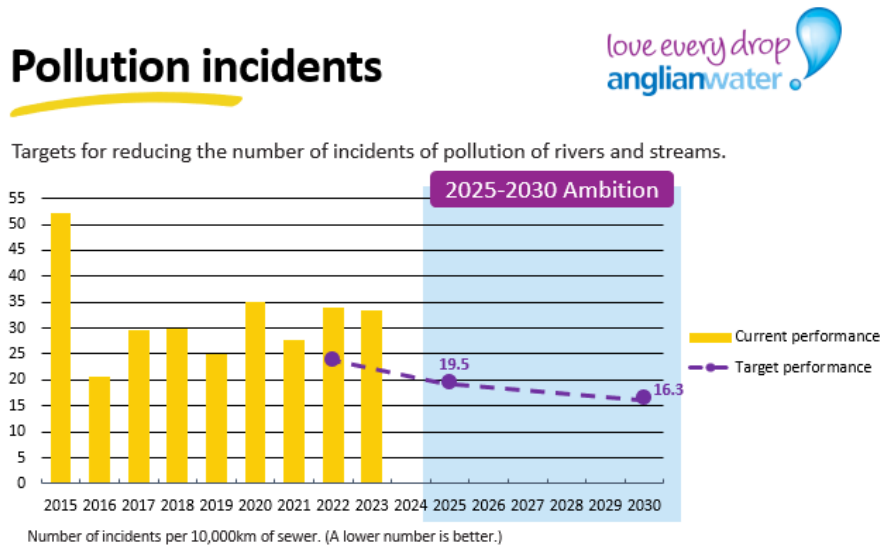
Better performance



Worse performance

companies.

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



#### How:

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

#### Performance:

Pollution has reduced by 36% since 2015

---

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

**Please select one answer only**

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

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

Anglian Water proposes investing £2,052 billion in these three areas over the five years from 2025 to 2030.

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

## Managing the impact of Growth



**£260m over five years to 2030**

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

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

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

## Environmental ambition

**£1.199bn over five years to 2030**

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



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

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

## Reducing spills



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

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

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

**Please select one answer only**

- Reducing spills
- Environmental ambition
- Managing growth

## Q63. Plans to support customers

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.

## Financial Support Schemes



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

## Q64. Proposed changes to your water/sewerage bill for the years 2025-2030.

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 £311 per year (**£0.85 per day**) for waste only services

The total average household bill in the period from 2025-2030 will be £309 per year (**£0.85 per day**) for sewage services.

Based on this high level plan, how acceptable or unacceptable do you find Anglian Water's focus for 2025-2030?

**Please select one answer only**

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

---

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.

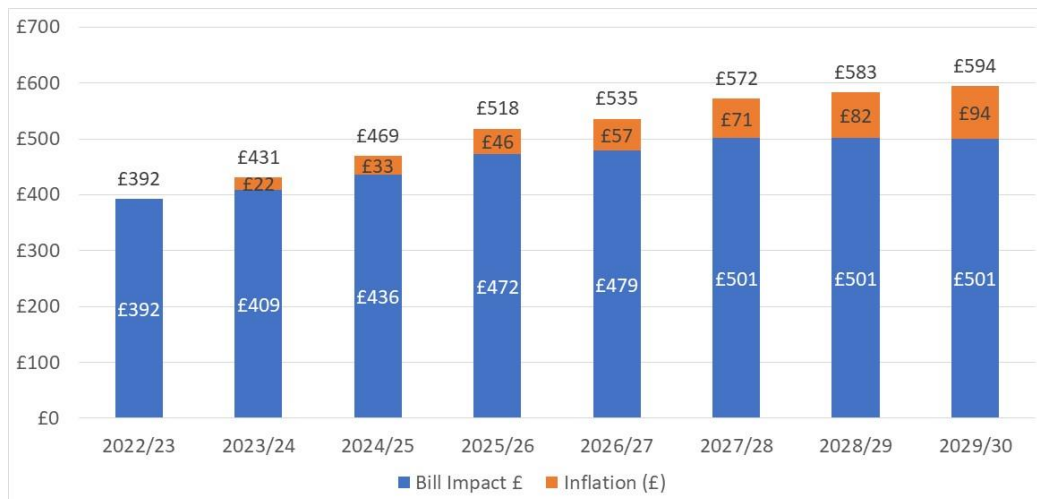
The chart on the next page shows the expected increase in your **water and sewerage** bill over the next few years.

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

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

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



Q58. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

**Please select one answer only**

- Very easy **Please skip question 20**
- Fairly easy **Please skip question 20**
- Neither easy nor difficult **Please go to Question 20**
- Fairly difficult **Please go to Question 20**
- Very difficult **Please go to Question 20**
- Don't know

---

**Q59. Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 19 (Q19 above)**

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

***Please select all that apply***

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify:

---

Don't know

---

**Q60. Thinking about the two previous questions, how much did you base your responses on the impacts of the proposed bills on your personal household and wider society?**

***Please indicate the point of the scale below that reflects your view***

●-----●-----●-----●-----●

Only thinking  
about my  
household  
finances

Only thinking  
about wider  
society

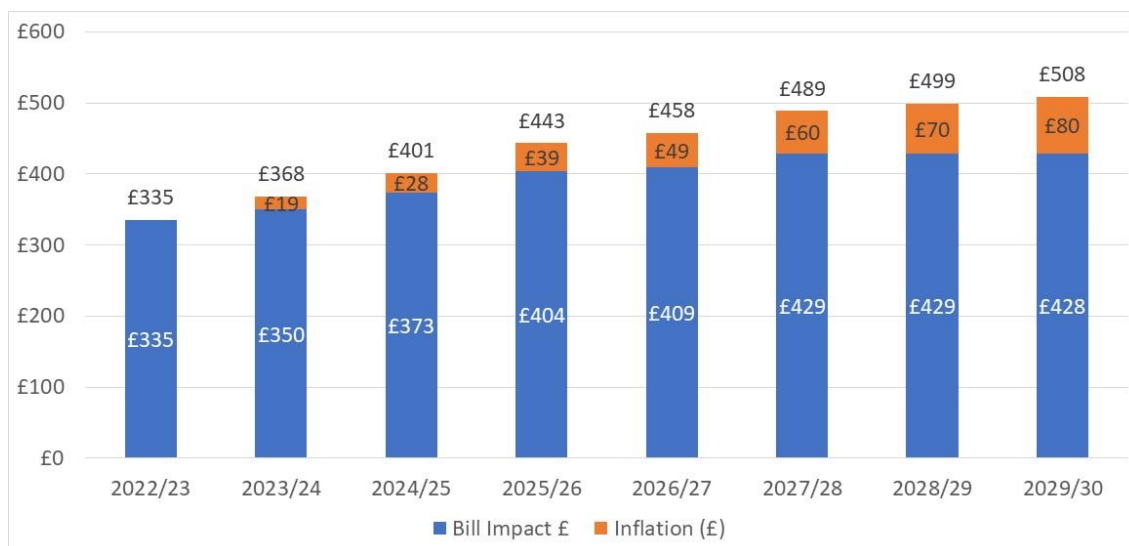
---

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

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

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

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.



How easy or difficult do you think it would be for you to afford these sewerage bills?

**Please select one answer only**

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

## Q65. Acceptability of Anglian Water's plans

**Q61.** Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you?

**Please select one answer only**

- Completely acceptable **Please go to Question Q26**
- Acceptable **Please go to Question Q26**
- Unacceptable **Please go to Question Q25**
- Completely unacceptable **Please go to Question Q25**
- Don't know/can't say

**Q62. Answer if you selected "Unacceptable" or "Completely unacceptable" at question 24 (Q24 above)**

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

**Please choose up to two answers only**

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services

- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q63. Answer if you selected "Acceptable" or "Completely acceptable" at question 24 (Q24 above)**

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

***Please choose up to two answers only***

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q64. How strongly do you support or oppose Anglian Water's plans and actions to deal with the challenges faced?**

***Please select one answer only***

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

Please explain why you gave this response.

- Improving the environment

- Long coast lines

Significant flood risk

Driest region in the UK

Climate change

Housing and population growth

## Q66. Investment Plans to 2050

Q65. Long term investment (up to 2050) by Anglian Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Delaying investment helps to keep bill increases affordable in the short term. But if it is delayed for too long, services could get worse in the future. Which one of the following options would you prefer?

***Please select one answer only***

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

## Q67. Household Demographic

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

Q66. In which of the following ways do you identify?

***Please select one answer only***

- Female
- Male
- I identify in another way
- Prefer not to say

---

Q67. Please indicate which one of the following best describes the profession of the chief income earner in your household

**Please select one answer only**

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q31**
- Student
- Prefer not to say

---

Q68. **Answer if you have selected “retired” at question 30 (Q30 above)**  
Does the main income earner have a state pension, a private pension or both?

**Please select one answer only**

- State only
- Private only **Please go to Question Q32**
- Both **Please go to Question Q32**
- Prefer not to say

---

Q69. **Answer if you have selected “private only” or “both” at question 31 (Q31 above)**

How would you describe the main income earner’s occupation type before retirement?

**Please select one answer only**

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

---

Q70. 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.

**Please select all that apply**

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old

- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

---

Q71. What is your ethnic group? Choose one option that best describes your ethnic group or background

***Please select one answer only***

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**OTHER ETHNIC GROUP**

- Arab
- Any other ethnic group
- Prefer not to say

---

Q72. Which of the following bands does your household income fall into from all sources before tax and other deductions?

***Please select one answer only***

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

---

Q35b. Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:



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

## Q68. Thank you

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

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

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

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

---

Q73. 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.

Hartlepool version



Accent

## Affordability and Acceptability Testing

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

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

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

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

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

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

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

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

## Q69. 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 you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q74. Do you or any of your close family work in market research or for a water company?

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

No

---

Q75. How old are you? Please enter your age.

Please enter your age on the line below

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

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

---

Q76. Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

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

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

---

Q77. Are you currently charged for water through a water meter?

Yes

No

Don't know

---

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

Yes

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

Don't know

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

## Q70. Main Questionnaire

## Q71. Affordability

We are now going to ask you some questions about your household's financial situation.

---

Q78. Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

***Please select one answer only***

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

---

Q79. Overall, how well would you say you are managing financially now?

***Please select one answer only***

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

---

Q80. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

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

---

Q81. Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

***Please select one answer only***

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say

Don't know

## Q72. About Anglian Water

### 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.

Q10b. Please take a look at the following information about Anglian Water.

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

## Q73. Supporting Customers in Vulnerable Situations

Q10c. 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

### Supporting customers

Range of tariffs	Temporary instalment plans	Payment breaks	Back on track schemes	Assistance fund
LITE Extra LITE	WaterSure AquaCare Plus		<b>£135 million</b> of direct support provided this year with plans to go further in the future.	 

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.

bills over a manageable period.

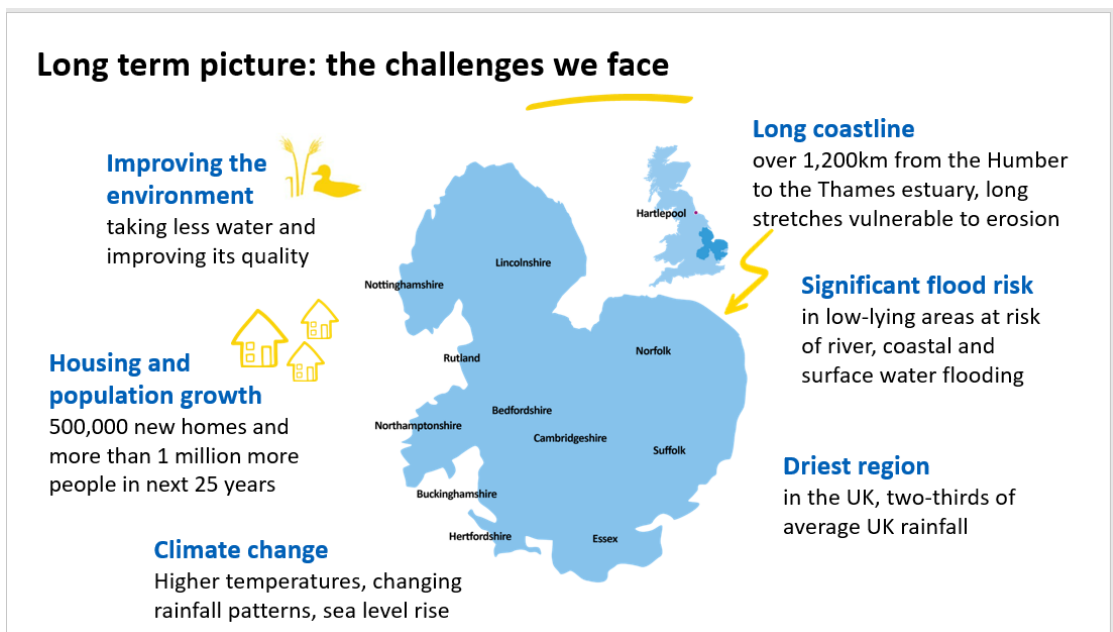
How familiar are you with the services that Anglian Water provides for customer who might need extra support?

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

## Q74. Anglian Water's Plans

Q10d. 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:



## Q75. 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 business plan objectives. We are now going to show you Anglian Water's plans in three areas that relate to clean water services:

- Appearance, taste and smell of tap water

- Leakage
- Unplanned water supply interruptions

For each performance commitment we will show you 2 slides:

- The first shows Anglian Water’s current performance against other 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.

### Unplanned Water Supply Interruptions.

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

## Unplanned interruptions



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

Duration without water for more than 3 hours by minutes per property  
Companies with the lowest numbers perform better

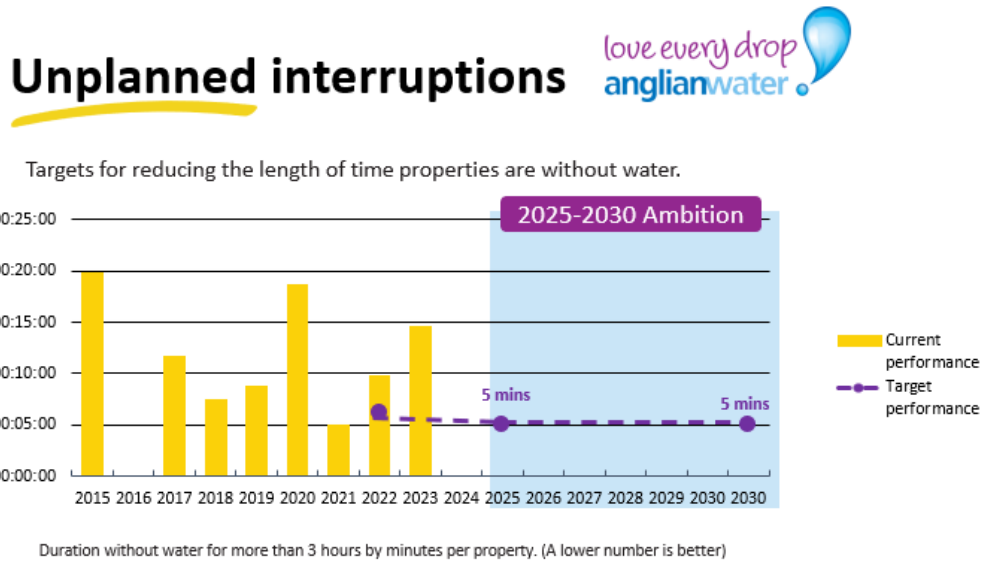
**Anglian Water has not met its target for this measure last year**

Anglian Water are ranked 9<sup>th</sup> out of 17 companies on this measure

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



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



**How:**

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

**Performance:**

Interruptions have reduced by 26% since 2015

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.

## Reducing leaks



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

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

Anglian Water met its target for this measure last year

Anglian Water are ranked 5<sup>th</sup> out of 19 companies on this measure

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

Better performance ↑

↓ Worse performance

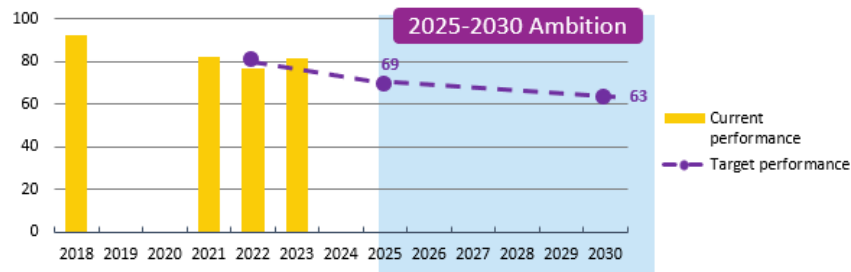


The next chart shows what Anglian Water’s proposed targets for reducing leakage.

## Reducing leaks



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



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

### How:

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

### Performance:

Leaks have reduced by 7% since 2018

## Water Quality Contacts

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

## Appearance, taste and smell of tap water



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

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

Anglian Water met its target for this measure last year

Anglian Water are ranked 8<sup>th</sup> out of 17 companies on this measure

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

Better performance

Worse performance

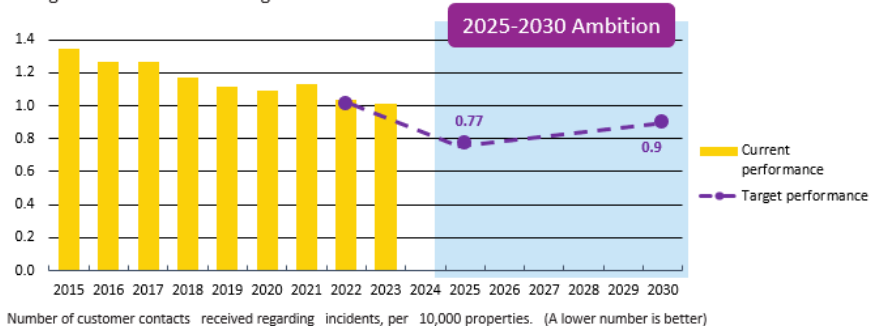
other water companies.

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

## Appearance, taste and smell of tap water



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



### How:

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

### Performance:

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

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

### *Please select one answer only*


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

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

Anglian Water proposes investing £1,894 in these three areas over the five years from 2025 to 2030.

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

## 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 20<sup>th</sup> century)
  - treatment of PFAS (or 'forever chemicals')

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

## Climate resilience and net zero



**£303m over five years to 2030**  
An average customer would pay a total of £323.30 extra on their bill over five years

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

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

## Balancing water supply and demand

**£1.225bn over five years to 2030**

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



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

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

**Please select one answer only**

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

## Q76. Plans to support customers

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

### Financial Support Schemes



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.**



schemes such as budgeting support and accessing different tariffs.

How acceptable or unacceptable do you find these plans:

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

## Q77. Proposed changes to your water/sewerage bill for the years 2025-2030.

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 £286 per year (**£0.78 per day**) for water only services.

The total average household bill in the period from 2025-2030 will be £286 per year (**£0.78 per day**) for water services.

Based on this high level plan, how acceptable or unacceptable do you find Anglian Water's focus for 2025-2030?

**Please select one answer only**

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

---

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.

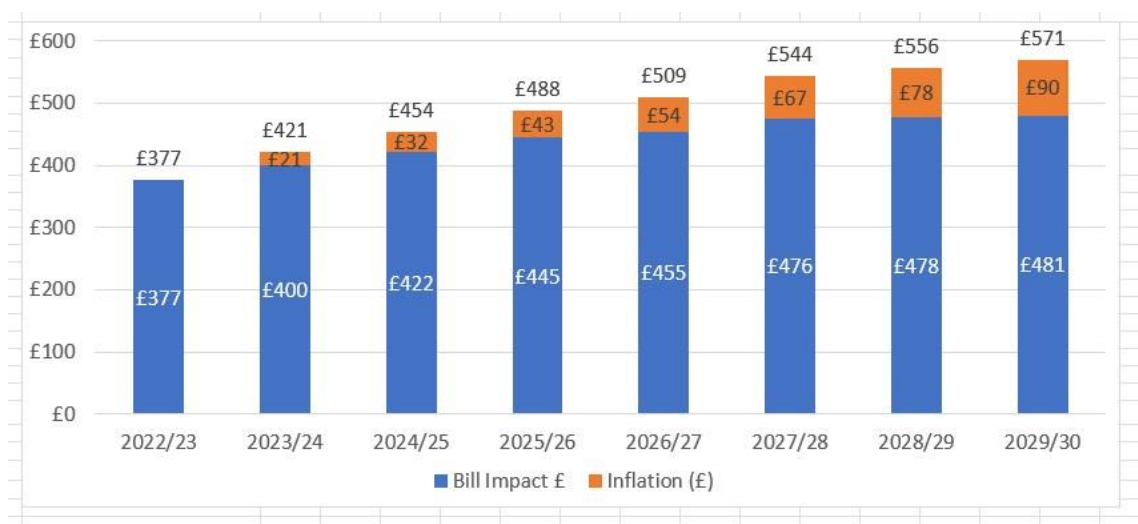
The chart on the next page shows the expected increase in your **water and sewerage** bill over the next few years.

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

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

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



Q82. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

**Please select one answer only**

- Very easy Please **skip** question 20
- Fairly easy Please **skip** question 20
- Neither easy nor difficult Please **go to** Question 20
- Fairly difficult Please **go to** Question 20
- Very difficult Please **go to** Question 20

Don't know

---

**Q83. Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 19 (Q19 above)**

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

***Please select all that apply***

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify:

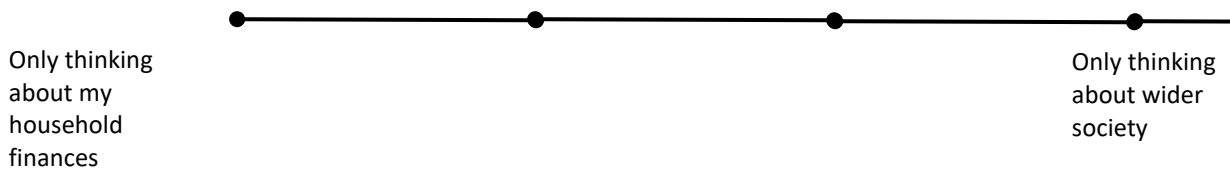
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Don't know

---

Thinking about the two previous questions, how much did you base your responses on the impacts of the proposed bills on your personal household and wider society?

***Please indicate the point of the scale below that reflects your view***



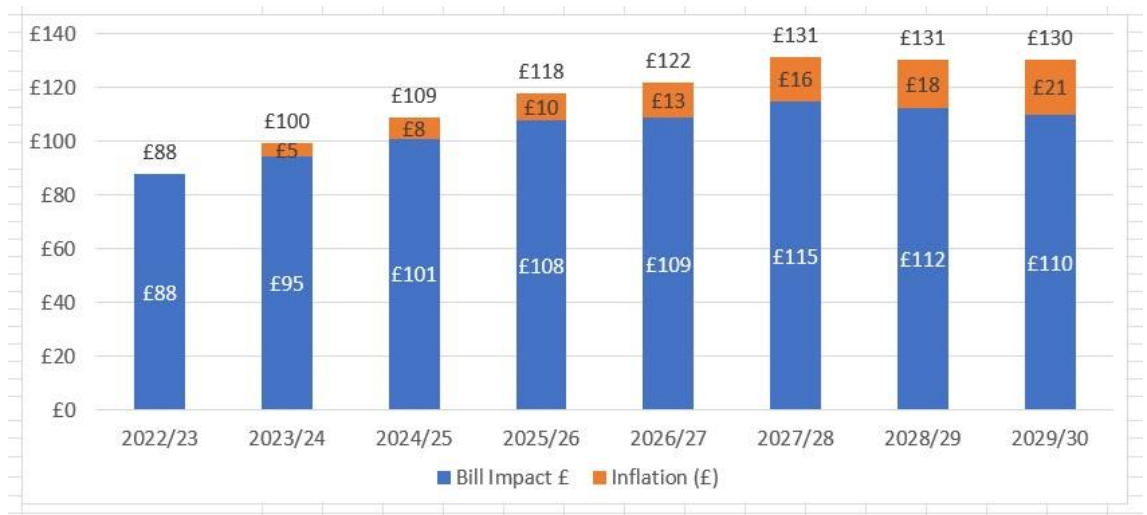
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The chart on the following page shows the expected increase in the **water only component** of your bill over the next few years.

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

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

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.



How easy or difficult do you think it would be for you to afford these water bills?

**Please select one answer only**

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

## Q78. Acceptability of Anglian Water's plans

Based on everything you have seen and read about Anglian Water's proposed business plan, how acceptable or unacceptable is it to you?

**Please select one answer only**

- Completely acceptable **Please go to Question Q26**
- Acceptable **Please go to Question Q26**
- Unacceptable **Please go to Question Q25**
- Completely unacceptable **Please go to Question Q25**
- Don't know/can't say

**Q84. Answer if you selected "Unacceptable" or "Completely unacceptable" at question 24 (Q24 above)**

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

**Please choose up to two answers only**

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements



Other 1, please specify

\_\_\_\_\_

Other 2, please specify

\_\_\_\_\_

Don't know/ can't say

---

**Q85. Answer if you selected "Acceptable" or "Completely acceptable" at question 24 (Q24 above)**

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

***Please choose up to two answers only***

The plan is good value for money

The plan is affordable

Compared to energy prices it's cheaper

Their plans seem to focus on the right services

The company provides a good service now

I support what they are trying to do in the long term

The change to my bill is small

I trust them to do what's best for customers

I have been dissatisfied with the service recently but am pleased that they are making improvements

Other 1, please specify

\_\_\_\_\_

Other 2, please specify

\_\_\_\_\_

Don't know/ can't say

---

How strongly do you support or oppose Anglian Water's plans and actions to deal with the challenges faced?

***Please select one answer only***

Strongly support

Somewhat support

Neither support nor oppose

Somewhat oppose

Strong oppose

Don't know

Please explain why you gave this response.

Improving the environment

Long coast lines

Significant flood risk

Driest region in the UK

Climate change

Housing and population growth

## Q79. 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?

***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

## Q80. Household Demographic

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

---

In which of the following ways do you identify?

***Please select one answer only***

- Female
- Male
- I identify in another way
- Prefer not to say

---

Q86. Please indicate which one of the following best describes the profession of the chief income earner in your household

***Please select one answer only***

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
  - Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
  - Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
  - Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
  - Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
  - Housewife/Househusband
  - Unemployed
  - Retired **Please go to Question Q31**
  - Student
  - Prefer not to say
- 

**Q87. Answer if you have selected “retired” at question 30 (Q30 above)**

Does the main income earner have a state pension, a private pension or both?

**Please select one answer only**

- State only
  - Private only **Please go to Question Q32**
  - Both **Please go to Question Q32**
  - Prefer not to say
- 

**Q88. Answer if you have selected “private only” or “both” at question 31 (Q31 above)**

How would you describe the main income earner’s occupation type before retirement?

**Please select one answer only**

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

**Q89. 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.**

**Please select all that apply**

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me

Prefer not to say

---

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

***Please select one answer only***

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**OTHER ETHNIC GROUP**

- Arab
  - Any other ethnic group
  - Prefer not to say
- 

Q90. Which of the following bands does your household income fall into from all sources before tax and other deductions?

***Please select one answer only***

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

Q35b. Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills. More information about this can be found here:

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

## Q81. Thank you

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

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

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

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

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

- Yes
- No

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

# APPENDIX G

Cognitive Report

# Anglian Water Shadow A&AT Testing: Quantitative Cog Testing Sample

Six cognitive interviews were undertaken with domestic customers.

Participants were recruited through our recruitment partner Roots.

The interviews covered a range of customer types (as shown in table 1 below). All participants were proficient at using Zoom and did not work in Market Research.

Participants were offered a £40 incentive to thank them for their time.

Table 1: Sample breakdown

	Category	Sample size
Household customer type	Male	3
	Female	3
	ABC1	3
	C2DE	3
	Under 45	3
	45+	3

## Method

The interviews took place on Zoom in two parts:

- For the first part, participants were asked to share their screen and complete the survey without any interaction with the interviewer to replicate the research process. Interviewers watched participants complete the survey, whilst noting how long each section took and any facial cues.

- For the second part, interviewers took participants back through their completed survey and asked their thoughts on each section.

Interviewers used cognitive probes to assess areas of the survey that were inaccessible or difficult to understand. The interviews lasted approximately 60 minutes. It is important to note that whilst we tried to replicate the research process, there will still be some form of methodological impact on the results by being observed, compared to completing the survey alone.



## Findings

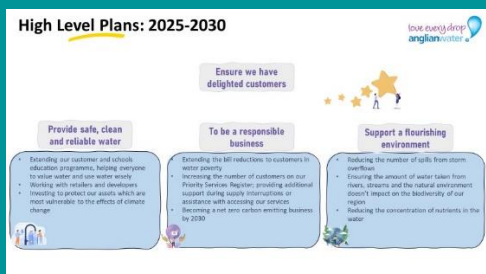
Question	Comments	Action
General	The interview took between 17 and 35 minutes to complete (during the first part of the cognitive process when participants were asked to complete the survey uninterrupted)	None required.
	Overall, participants felt the questionnaire was a very clear and, for some, enjoyable to complete. Participants appreciated comprehensive language and the lack of jargon.	None required.
	Some participants commented that they felt more positively towards Anglian Water as a result of completing the questionnaire.	None required.
	Participants generally found the survey to be 'wordy', however, participants typically thought the level of detail was 'about right'.  <i>"The survey was good – very wordy but I had time to get it. It was thorough and had a lot of information."</i>	None required.
	The survey flowed well with no participants choosing to return and review earlier sections.  <i>"The survey was fine, easy to read and had good flow."</i>	None required.
	Participants engaged thoroughly with the stimulus materials and found them easy to read, accessible, informative, and interesting. Some expressed a desire for accompanying case studies.  <i>"It's good to know how they plan to control climate change and stop leakage, and provide practical examples of how that will happen as opposed to just providing targets. I would have liked to see an element</i>	Consider adding more granular detail to high-level areas especially Anglian Water's high-level plan and the Long-term phasing options.

	<p><i>of a case study.”</i></p>	
	<p>For one participant the questionnaire felt a bit too lengthy.</p> <p><i>“It’s a bit long-winded – it’s a lot to take in.”</i></p>	<p>None – guidance mandated.</p>
	<p>Customers felt uncertain about household finances given the current economic climate. For some this influenced how they approached certain questions and affected their responses.</p> <p><i>“Inflation feels unknown. It’s hard to know about financial situation in a few years’ time. It depends on opportunities and aspects such as mortgage rates etc.”</i></p>	<p>None required.</p>
	<p>Overall customers thought the plan was acceptable however the price increases did cause hesitation for some participants.</p> <p><i>“Plans and general information give a positive view of AW, the bill impacts not so much.”</i></p>	<p>None – guidance mandated.</p>

Current Affordability (Q9-13)	<p>Generally, this section was found to be clear and straight forward by most participants. The questions were easy to answer for most participants.</p> <p><i>“These questions were super easy to answer. They there personal without being too in-depth e.g. what’s my salary?”</i></p>	None required.
	Q9 – Easy to answer.	None required.
	Q10 – Easy to answer.	None required.
	Q13 – Easy to answer.	
	<p><i>“We can afford it comfortably. I did notice a price increase recently, but it’s still good value for money.”</i></p>	None required.
	<p>Q11 – Participants found this question slightly more difficult to answer given the current economic climate and uncertainty about the future.</p> <p><i>“It was difficult because I can’t tell what tomorrow brings. I am retired now so I don’t know how inflation will impact my state pension and private pension – not sure if this will be enough. But water is really important. You can’t do without it.”</i></p>	None – guidance mandated.
Q12 – Easy to answer.	None required.	



## Anglian Water's High-Level Plan (Q13c)



For most participants, this section was too high-level. One participant mentioned that a road-map or a supporting case study would be helpful at this point.

*“Their proposal covers touches on climate change and environment; seeing these examples in their road map might have been a nice reference point. First time we hear about climate change in long term picture. It’s a high-level plan graphic but the text is quite small.”*

Another participant expressed a desire for more granular information particularly on environmental elements.

*“What does net-zero actually mean here?”*

For most participants it was difficult to comment on acceptability at this stage based on the level of information given. This may reduce the acceptability as people are hesitant to give a strong response at this stage.

*“Only reason not completely acceptable is want to know what roadmap actually looks like. Any company could aim to be environmentally friendly so need example could be doing this by x, y, z.”*

One participant found these high level plans acceptable.

*“I felt that these ideas were acceptable; it seemed well thought about. I didn’t know about the concentrations of nutrients in the water etc. but I was happy to see that they were addressing challenges and improving services to tackle them.”*

Consider adding more granular detail here.

Intended to be a high-level snapshot. None required.

None- required.

Anglian Water's Plans - Performance Commitments (Q16-Q23)

All participants said the comparative data and the target charts were easy to follow.

*"Tables were easy to work through. Took around 30 seconds to figure out the first one."*

None.

There was poor engagement with the 'how' and 'performance' text boxes with some participants not engaging with this information at all.

Re-format the 'how' and 'performance' text boxes so they are more eye-catching by using coloured backgrounds.

There were mixed feelings on the level of ambition of Anglian Water's targets with some thinking they were impressive and others maintaining they weren't ambitious enough.

For one participant, the targets were not impressive enough but when considered in relation to the catchment area, they seemed more reasonable.

*"On performance targets, they should do more but they do cover the biggest region in the country."*

For one participant, recognition of poor performance in the past would help.

*"I Would like to see more recognition of the poor performance in the text; 'we've improved but have a long way to go etc.'"*

None – this was a minority opinion.

	<p>One participant thought some of the performance targets were not ambitious enough and felt Anglian Water should be doing a lot more.</p> <p><i>“The target performance looks like it is going in the wrong way e.g. getting back to where they were years ago maybe they should be doing much better – It’s not really progress.”</i></p>	<p>None – guidance mandated.</p>
	<p>Some participants found the wording confusing on two of the performance commitment slides.</p> <p>Participants thought the statement about ‘being close to the best’ regarding indoor sewage floods were not suitable and didn't align with the data.</p> <p>On Pollution Incidents, one participant found the text confusing.</p> <p><i>“The wording of pollution incidents is difficult to understand. It shows Anglian water as one of the worst but then says they have made good progress.”</i></p>	<p>Consider deleting text.</p>

Anglian Water's Plans – Key Investment Areas (Q24-Q34c)

The enhancements were considered easy to digest by all participants. The singular layout of each enhancement area was felt to be clear, allowing participants time to digest the information.

*"The slides were easy to read and digest."*

*"It's clear as the copy is set out in different sections with the detail beneath."*

*"It's easy to read these and pick the most important area."*

None required.

Participants found it helpful to see large investment amounts broken down into smaller figures spent on certain areas. This made Anglian Water's long-term plans clear to customers.

*"It's clear to see what their long-term ambitions are."*

*"This is pretty thorough. The figure is huge but I like how it's broken to consumer footprint and bill impact."*

None required.

Some participants commented on the presentation of costs. One person felt that an annual or monthly figure would be easier for customers to understand and would feel more personable.

Another participant needed clarification about whether the cost of the average bill would apply to them.

*"It's not clear if these costs refer to personal bills. There should be clearer wording on who these costs apply to."*

None – guidance mandated.



For one participant the formatting could be improved, given the small size of the slide.

*“Formatting could be improved as the slide is very small in contrast to the copy above.”*

Slides should fill the width of the page to increase the text size.

**Proposed Bills (13cc-15b)**

For most participants this section was easy to understand.

Most participants engaged with the introductory text about inflation finding it helpful and easy to understand.

*“The text was interesting. I do like the context on inflation which is valid and gives you a real-life summary on what it looks like in my pay packet.”*

The chart mapping bill increases was clear for most participants.

*“It’s easy to decipher the impact of inflation and the bill increases. It’s a steady increase its not going to be a big shock.”*

Two participants suggested alternative presentations of different ways of presenting bill increases.

For one participant rounded numbers would be easier to understand. For another, it would be more helpful to have bill increases expressed in percentages.

*“It’s fine but I did convert the numbers to percentages when reading it. I would have preferred to see the increases presented as percentages. The increases do seem like a lot.”*

None required.

Consider added in bill increases in percentages.

One participant expressed a desire for more information given the specific challenges that Anglian Water are facing with lawsuits.

*“There’s not enough information provided. With big companies, you can give them a carte blanche even when you know they are being careless. Currently, they are facing an 8-million pound lawsuit. The investors will be called up to pay for some but most of this will be footed by the customers.”*

None recommended – this was a minority opinion.

Acceptability (Q32-34b)

Overall participants found it easy to answer on the acceptability of Anglian Water's business plans given the information provided.

Participants expressed varying degrees of acceptability. For some the cost made it unacceptable. For others, the proposals were acceptable given the information provided.

*"I expected to see more ambition for the level of investment on most performance commitments however they are going in the right direction. It all sounds acceptable and reasonable looking at the targets, performance and plans."*

One participant found it challenging to comment on acceptability given the lawsuits that Anglian Water are currently facing. This participant was concerned about use of funds generated from these bill increases.

*"It's hard to comment on acceptability ... lots of lawsuits are coming up so it's hard to say what this money will be spent on."*

None required.

None required – this was a minority opinion.

Long-term Plans (Q35-35c)

Overall participants found it easy to answer on the their preferred option for this question and could articulate their reasoning behind this.

None required.

Two participants found it challenging to give an answer.

One participant was unsure of what to answer and wanted another more moderate option.

*“I found the phrasing Q difficult – though it was all now or all later – wanted a more moderate response option about spreading the cost out evenly.”*

Another participant felt conflicted as there were pros and cons to both options and would like more information on each before making a decision.

*“This is difficult because if I say increase bills sooner, then I’ll be absorbing the fines they have to pay. But if I say later, my 15-year old son will have problems with this in the future – and we don’t know what the economy will be like. So at the moment, I don’t know enough to give an answer.”*

None required – guidance mandated.

One participant suggested the long-term plan should be spread across two pages, one for water and one for waste as done earlier in the survey.

*“There is too much information for one page for the long-term plan. IT would be better broken down ... like the previous slides.”*

Consider separating the plan across two pages.

