13G. ACCEPTABILITY TESTING: OUTLINE BUSINESS PLAN
Acceptability Testing: Outline Business Plan

Final Quantitative Data
Background

- Anglian Water, the largest geographical water and water recycling company in England and Wales, has commissioned Accent to undertake research on the acceptability of their plans to customers.

- Phase 3 of Acceptability Testing sought customers’ views on the outline Business Plan which sets out AW’s plans for the next five years. It’s important to ensure that this plan matches the expectations of Anglian Water’s customers.
Acceptability Testing: Outline BP

- **Outline Business Plan tested with HH and NHH customers**
  - 1,619 interviews with HH customers
    - 1,002 in the AW dual supply area
    - 200 in the E&SW waste water supply area
    - 217 in the Cambridge Water waste water supply area
    - 200 in the Hartlepool Water supply area
    - Half conducted by telephone and half online via a commercial panel
  - 500 with NHH customers
    - All telephone from sample provided
  - Average interview length = 35 minutes

- Quotas were set to ensure that the overall dataset was representative of AW/HW customers (age, SEG and gender)

- HH data weighted to latest Census data for age, SEG and gender for the supply areas.
The big questions
Acceptability increases by 6% once informed.

Who finds the plan most acceptable?
- Hartlepool Water customers (significantly more likely to say very acceptable than other regions both uninformed and informed).

Who is most likely to find the plan unacceptable?
- Eco Economisers & Protective Provincials (significantly more likely than all other segments to say very unacceptable both uninformed and informed).

<table>
<thead>
<tr>
<th>Uninformed</th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very acceptable</td>
<td>22</td>
</tr>
<tr>
<td>Acceptable</td>
<td>52</td>
</tr>
<tr>
<td>Neither unacceptable nor acceptable</td>
<td>14</td>
</tr>
<tr>
<td>Unacceptable</td>
<td>6</td>
</tr>
<tr>
<td>Very unacceptable</td>
<td>4</td>
</tr>
<tr>
<td>Don't know</td>
<td>1</td>
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</tbody>
</table>

Q16 vs Q139. Base: Total 1,619
BP acceptability: uninformed vs informed

- Acceptability increases by 7% once informed
  - Businesses with high annual water consumption or large bills significantly more likely to say very unacceptable than those with low consumption or small bills (uninformed)
  - ‘Energy or Water Supply & Service’ sector significantly more likely to say very unacceptable than ‘Wholesale and Retail Trade’ and ‘Government, Health & Education’ sectors (uninformed)
A taste of what drives acceptability

All looks good and setting the bar quite high.

Always trusted them and what they have done to be acceptable.

Although I can’t compare or gauge how stretching these goals are when compared to competitors as I’m not an industry observer, I do believe all the goals identified to be worthwhile and with significant tangible value. I think these plans are honourable and should press ahead.

All good stuff - hope they are attaining to environment needs and that there is no wasting of water. Pleased they are doing work to address this and reach performance targets. I have a problem with the incentive scheme. I think that if a company should be incentivised by improving it should be by efficiency to increase profitable without increasing customer bills. Should reduce cost and improve performance. It’s in customer interest for company to not meet targets so bills are decreased and surely that is ridiculous.

Anglian Water is committed to address the most important issues & provide the best service
And what drives unacceptability

Although I understand the problems facing the company regarding increasing housing and climate change my primary concern is the cost of my water and sewage bills.

Anglian Water are a profit making business so their prime motivator is profit. Can we be sure that bill increases are purely for improvements and investments for things like climate change.

Anglian should have been investing more for years instead of making huge profits.

Anglian Water seems to want to do a lot. Do they have the resources for it all?
BP affordability: uninformed vs informed

- Perceived affordability increases by 7% once informed
- There are some significant differences by region and segment:
  - Hartlepool region more likely to say very affordable than Anglia, Cambridge, Essex & Suffolk water
  - Family First and Tech Savvies most likely to say very affordable

Q16a vs. Q141. Base: Total 1,619

[Diagram showing the comparison between uninformed and informed perceptions of affordability]
BP affordability: uninformed vs informed

- Perceived affordability increases by 8% once informed

- There are some significant differences by sector and spend:
  - ‘IT & Communication’ sector more likely to say not very affordable than ‘Manufacturing’, ‘Wholesale & Retail Trade’ and ‘Finance & Insurance Activities’ sectors (uninformed)
  - Businesses with large bills more likely to say not at all affordable (uninformed) and unaffordable/very unaffordable (informed) compared to those with small and medium sized bills
BP RORE acceptability: uninformed
BP RORE affordability: informed

- Uninformed acceptability of +/- £20 per annum stands at 74%
- A further 14% reported this was neither acceptable nor unacceptable
- Informed affordability stands at 60% with a further 24% stating it is neither affordable nor unaffordable

Q16a vs. Q141. Base: Total 1,619
BP RORE acceptability: uninformed

- Uninformed acceptability of +/- £20 per annum stands at 59%

- A further 20% reported this was neither acceptable nor unacceptable

BP RORE affordability: informed

- Informed affordability stands at 65% with a further 24% stating it is neither acceptable nor unacceptable

Uninformed
- Very acceptable: 10
- Acceptable: 49
- Neither unacceptable nor acceptable: 20
- Unacceptable: 13
- Don't know: 6

Informed
- Very affordable: 18
- Affordable: 47
- Neither affordable nor unaffordable: 24
- Unaffordable: 7
- Very unaffordable: 2
- Don't know: 2

NHH
Customers understand the impact of inflation on bills

More than 95% of customers say that they understand the impact of inflation on bills:

HH

- Cambridge Water: 99%
- Hartlepool Water: 96%
- Anglian Water: 95%
- Essex & Suffolk Water: 95%

NHH

Yes: 97%
No: 3%
Responding to Climate Change
Overall, customers prefer costs to be reflected in bills as work is undertaken. However, there are preferences between regions and segments.

- Anglian and Cambridge regions significantly more likely than Essex & Suffolk to prefer costs to be reflected in bills as work is undertaken.
- Hartlepool region significantly more likely than Cambridge to prefer bill increase over a longer period.
- NHH:
  - 46% over next five years
  - 50%: cost reflected over longer period
Majority of customers want the work to be completed over the next five years

- **NHH customers:**
  - 75% want work to be completed over the next five years

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### Percentage of Participants

<table>
<thead>
<tr>
<th>Water Company</th>
<th>Complete work over next five years</th>
<th>Defer some of the work</th>
<th>Don't mind</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anglian Water</td>
<td>65</td>
<td>24</td>
<td>6</td>
<td>5</td>
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<tr>
<td>Hartlepool Water</td>
<td>68</td>
<td>29</td>
<td>3</td>
<td>0</td>
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<tr>
<td>Cambridge Water</td>
<td>73</td>
<td>19</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Essex &amp; Suffolk Water</td>
<td>59</td>
<td>18</td>
<td>15</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Anglian Water 1,002; Hartlepool Water 200; Cambridge Water 217; Essex & Suffolk Water 200

Q19 region
Intergenerational Bill Response
The options presented to customers

- **Green line** – a potential increase of £21 over 5 years from 2020 to 2025 that would allow Anglian Water to implement all of the investments set out in their Business Plan. From 2026 to 2030 customers’ bills would stay at £433 as all the required investments have been made and paid for over the previous 5 years.

- **Red line** – a potential increase of £10 over the period 2020-2025 that would allow some but not all investments to be made or some of the cost of these investments to be applied to customers’ bills at a later date. After 10 years customers bills will have risen from £422 to £433 to pay for the investments needed.

- **Blue line** – no potential bill increases over the period 2020-2025 but investment would be deferred which could make them more costly. After 10 years customers bills will have risen from £412 to £433 to pay for the investments needed to support increase of £10.
On balance HH customers prefer to have all investments made and paid for over AMP7

- Cambridge region significantly more likely than Anglian and Essex & Suffolk to support increase of £21
- Anglian region significantly more likely than Hartlepool to support increase of £10

Q23 region. Base: Anglian Water 1,002; Hartlepool Water 200; Cambridge Water 217; Essex & Suffolk Water 200
And this is reflected in the views of NHH customers

- More than half support an increase of £21; this is unanimous across all business sizes
- Only two sectors support a £10 increase (findings NS):
  - Agriculture, forestry & fishing
  - Transport & storage
- Organisations with higher annual water consumption prefer a £10 increase (findings NS)
Customer priorities
## Service areas

Water mains bursts rated as most important service area; this was unanimous across all segments and regions with some significant differences:

- **Careful Budgeters** more likely than **Family First** to rate this as most important
- **Essex & Suffolk Region** significantly more likely than **Anglian, Hartlepool and Cambridge water** to rate as most important

<table>
<thead>
<tr>
<th>Service Area</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<th>Most Important</th>
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<tbody>
<tr>
<td>Water mains bursts</td>
<td>4</td>
<td>7</td>
<td>9</td>
<td>14</td>
<td>18</td>
<td>48</td>
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<tr>
<td>Sewer collapses</td>
<td>5</td>
<td>8</td>
<td>10</td>
<td>20</td>
<td>39</td>
<td>17</td>
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<tr>
<td>Water Treatment Works and Water Recycling</td>
<td>13</td>
<td>16</td>
<td>21</td>
<td>21</td>
<td>15</td>
<td>14</td>
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<tr>
<td>Centre Compliance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>External sewer flooding</td>
<td>6</td>
<td>15</td>
<td>33</td>
<td>28</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>Unplanned asset outages</td>
<td>37</td>
<td></td>
<td>25</td>
<td>14</td>
<td>11</td>
<td>6</td>
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<tr>
<td>Properties at risk of low pressure</td>
<td>38</td>
<td>34</td>
<td>12</td>
<td>5</td>
<td>8</td>
<td>3</td>
</tr>
</tbody>
</table>

Q24. Base: Total 1,619
Service areas

- **Water mains bursts** rated as most important service area
- This was unanimous across all business sizes and sectors, except for ‘IT & Communication’ sector who prioritised Water Treatment Works and Water Recycling Centre Compliance.
Customers across all regions consider support for customers in vulnerable circumstances to be highest priority.

Family First is the only segment not to judge this measure as most important, and instead prioritise targeted and effective support which is flexible.
Vulnerable customers

- Businesses of all sizes and across all sectors consider support for customers in vulnerable circumstances to be highest priority.
- ‘Production & construction’ business sectors significantly more likely than ‘Services’ to rate this measure as medium importance.
Performance Commitments
The majority of customers understand what each of the measures are:

- Per capita consumption: 98%
- Treatment works compliance: 98%
- Reactive Mains Bursts: 97%
- Mains bursts: 97%
- Leakage: 97%
- Properties at risk of persistent low pressure: 97%
- Percentage of population supplied by a single supply: 97%
- Risk of severe restrictions in a drought: 97%
- Water supply interruptions: 96%
- Unplanned outage: 96%
- Abstraction Incentive Mechanism: 91%
- Compliance risk index: 89%
Understanding of **water recycling** measures

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Operational carbon</td>
<td>98%</td>
</tr>
<tr>
<td>Pollution incidents</td>
<td>97%</td>
</tr>
<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>96%</td>
</tr>
<tr>
<td>WINEP</td>
<td>94%</td>
</tr>
<tr>
<td>Internal sewer flooding</td>
<td>93%</td>
</tr>
<tr>
<td>Sewer collapses</td>
<td>93%</td>
</tr>
<tr>
<td>Natural Capital</td>
<td>92%</td>
</tr>
<tr>
<td>External Sewer Flooding</td>
<td>90%</td>
</tr>
<tr>
<td>Risk of sewer flooding in a storm</td>
<td>89%</td>
</tr>
<tr>
<td>Embodied carbon</td>
<td>88%</td>
</tr>
</tbody>
</table>

- Family First segment significantly more likely than the Economisers to understand internal sewer flooding.
- However, Family First segment least likely to understand external sewer flooding, risk of sewer flooding in a storm and embodied carbon.
- Cambridge region significantly more likely than Anglian to understand external sewer flooding.
- Anglian region significantly more likely than Essex and Suffolk region to understand operational carbon.
Understanding of **customer service** measures

- **Supporting customers in vulnerable circumstances – PSR**: 98%
- **Developer services measure of experience (D-MeX)**: 98%
- **Managing void properties**: 98%
- **Non-household Retailer Satisfaction**: 97%
- **Supporting customers in vulnerable circumstances – Panel Assessment**: 96%
- **Customer measure of experience (CMEX)**: 94%

Tech-savvies more likely to understand measure than Protective Provincial.

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Q118, 122, 126, 126b, 130, 134. Base: Total 424
Whether water targets are sufficiently stretching

- Hartlepool region significantly more likely than Anglian to say that targets are sufficiently stretching for 6 of the measures:
  - Abstraction incentive mechanism
  - Unplanned outage
  - Percentage of population supplied by single supply system
  - Properties at risk of low pressure
  - Compliance risk index
  - Water supply interruptions
Whether **water** targets are sufficiently stretching

<table>
<thead>
<tr>
<th>Measure</th>
<th>HH: Don’t Know</th>
<th>HH: No</th>
<th>HH: Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk of severe restrictions in a drought</td>
<td>8%</td>
<td>9%</td>
<td>82%</td>
</tr>
<tr>
<td>Leakage</td>
<td>11%</td>
<td>7%</td>
<td>82%</td>
</tr>
<tr>
<td>% of population supplied by a single supply system</td>
<td>9%</td>
<td>10%</td>
<td>81%</td>
</tr>
<tr>
<td>Water supply interruptions</td>
<td>11%</td>
<td>12%</td>
<td>77%</td>
</tr>
<tr>
<td>Properties at risk of persistent low pressure</td>
<td>12%</td>
<td>10%</td>
<td>77%</td>
</tr>
<tr>
<td>Treatment works compliance</td>
<td>11%</td>
<td>12%</td>
<td>77%</td>
</tr>
<tr>
<td>Per capita consumption</td>
<td>14%</td>
<td>11%</td>
<td>75%</td>
</tr>
<tr>
<td>Abstraction Incentive Mechanism</td>
<td>20%</td>
<td>10%</td>
<td>70%</td>
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<tr>
<td>Unplanned outage</td>
<td>16%</td>
<td>14%</td>
<td>70%</td>
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<tr>
<td>Compliance risk index</td>
<td>19%</td>
<td>10%</td>
<td>70%</td>
</tr>
<tr>
<td>Reactive Mains Bursts</td>
<td>12%</td>
<td>18%</td>
<td>70%</td>
</tr>
<tr>
<td>Mains bursts</td>
<td>11%</td>
<td>22%</td>
<td>67%</td>
</tr>
</tbody>
</table>

HH customers who understood measures were significantly more likely than NHH to say ‘don’t know’ for 7 of the measures:

- Leakage
- Percentage of population supplied by single supply system
- Water supply interruptions
- Treatment works compliance
- Unplanned outage
- Reactive mains bursts
- Mains bursts

Q32, 36, 40, 44, 48, 52, 56, 60, 64, 68, 72, 76. Base: Risk of severe restrictions in a drought 268; Leakage 243; % of population supplied by a single supply system 267; Water supply interruptions 241; Properties at risk of persistent low pressure 268; Treatment works compliance 245; Per capita consumption 268; Abstraction Incentive Mechanism 250; Unplanned outage 265; Compliance risk index 223; Reactive Mains Bursts 245; Mains bursts 246
Whether **water recycling** targets are sufficiently stretching

Tech-savvies and Comfortable and Caring significantly more likely than Family First and Protective Provincials to say that targets are sufficiently stretching for:

- risk of sewer flooding in a storm
- operational carbon
- embodied carbon
- internal sewer flooding
**Whether water recycling targets are sufficiently stretching**

<table>
<thead>
<tr>
<th>Measure</th>
<th>HH: those who understood the measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>HH customers who understood the measure were significantly more likely than NHH to say target for operational carbon is not sufficiently stretching</td>
<td></td>
</tr>
<tr>
<td>HH customers significantly more likely than NHH to say ‘don’t know’ for 6 of the measures:</td>
<td></td>
</tr>
<tr>
<td>- WINEP</td>
<td></td>
</tr>
<tr>
<td>- Bathing waters attaining excellent status</td>
<td></td>
</tr>
<tr>
<td>- Pollution incidents</td>
<td></td>
</tr>
<tr>
<td>- Embodied carbon</td>
<td></td>
</tr>
<tr>
<td>- Sewer collapses</td>
<td></td>
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<tr>
<td>- External sewer flooding</td>
<td></td>
</tr>
<tr>
<td>- Internal sewer flooding</td>
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</table>

<table>
<thead>
<tr>
<th>Measure</th>
<th>Percent分布</th>
</tr>
</thead>
<tbody>
<tr>
<td>WINEP</td>
<td>77%</td>
</tr>
<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>72%</td>
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<tr>
<td>Pollution incidents</td>
<td>70%</td>
</tr>
<tr>
<td>Natural Capital</td>
<td>66%</td>
</tr>
<tr>
<td>Embodied carbon</td>
<td>66%</td>
</tr>
<tr>
<td>Operational carbon</td>
<td>62%</td>
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<tr>
<td>Sewer collapses</td>
<td>61%</td>
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<tr>
<td>Risk of sewer flooding in a storm</td>
<td>61%</td>
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<tr>
<td>External Sewer Flooding</td>
<td>59%</td>
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<tr>
<td>Internal sewer flooding</td>
<td>56%</td>
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</tbody>
</table>

Q80, 84, 88, 92, 96, 100, 104, 108, 112, 116. Base: WINEP 316; Bathing Waters Attaining Excellent Status 321; Pollution incidents 324; Natural Capital 307; Embodied carbon 312; Operational carbon 325; Sewer collapses 306; Risk of sewer flooding in a storm 319; External Sewer Flooding 320; Internal sewer flooding 314.
Whether customer service targets are sufficiently stretching

- Hartlepool region significantly more likely than Anglian, Essex and Suffolk Water to say sufficiently stretching for D-MeX experience and panel assessment.
- Anglian and Hartlepool regions more likely than Essex & Suffolk Water to say stretching for managing void properties and non-household retailer satisfaction.
- Comfortable and Caring significantly more likely than Family First to say stretching for supporting customers in vulnerable circumstances – PSR, and also significantly more likely than Economisers and Family First to say stretching for supporting customers in vulnerable circumstances – panel assessment.

**Managing void properties**
- Yes: 73%
- No: 13%
- Don't Know: 14%

**Non-household Retailer Satisfaction**
- Yes: 72%
- No: 9%
- Don't Know: 19%

**Supporting customers in vulnerable circumstances – PSR**
- Yes: 70%
- No: 12%
- Don't Know: 19%

**Supporting customers in vulnerable circumstances – Panel Assessment**
- Yes: 69%
- No: 9%
- Don't Know: 22%

**Developer services measure of experience (D-MeX)**
- Yes: 67%
- No: 13%
- Don't Know: 20%

**Customer measure of experience (CMEX)**
- Yes: 62%
- No: 10%
- Don't Know: 29%
Whether **customer service** targets are sufficiently stretching

<table>
<thead>
<tr>
<th>Category</th>
<th>HH (%)</th>
<th>NHH (%)</th>
<th>Don't Know (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing void properties</td>
<td>74%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Non-household Retailer Satisfaction</td>
<td>73%</td>
<td>8%</td>
<td>19%</td>
</tr>
<tr>
<td>Supporting customers in vulnerable circumstances – PSR</td>
<td>71%</td>
<td>11%</td>
<td>19%</td>
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<tr>
<td>Supporting customers in vulnerable circumstances – Panel Assessment</td>
<td>70%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Developer services measure of experience (D-MeX)</td>
<td>68%</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Customer measure of experience (CMEX)</td>
<td>64%</td>
<td>10%</td>
<td>27%</td>
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</tbody>
</table>

HH customers significantly more likely than NHH to say that they don’t know whether targets are sufficiently stretching for all measures.

Q120, 124, 128, 128b, 132, 136. Base: Managing void properties 408; Non-household Retailer Satisfaction 405; Supporting customers in vulnerable circumstances – PSR 409; Supporting Customers In Vulnerable Circumstances – Panel Assessment 402; Developer services measure of experience (D-MeX) 409; Customer measure of experience (CMEX) 390.
Importance of water measures

<table>
<thead>
<tr>
<th>Category</th>
<th>Low importance</th>
<th>Medium importance</th>
<th>High importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mains bursts</td>
<td>4</td>
<td>14</td>
<td>82</td>
</tr>
<tr>
<td>Leakage</td>
<td>2</td>
<td>29</td>
<td>68</td>
</tr>
<tr>
<td>Reactive Mains Bursts</td>
<td>3</td>
<td>32</td>
<td>65</td>
</tr>
<tr>
<td>Treatment works compliance</td>
<td>9</td>
<td>33</td>
<td>57</td>
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<tr>
<td>Water supply interruptions</td>
<td>6</td>
<td>36</td>
<td>57</td>
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<tr>
<td>Risk of severe restrictions in a drought</td>
<td>13</td>
<td>33</td>
<td>54</td>
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<tr>
<td>Compliance risk index</td>
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<tr>
<td>Properties at risk of persistent low pressure</td>
<td>11</td>
<td>39</td>
<td>50</td>
</tr>
<tr>
<td>Per capita consumption</td>
<td>9</td>
<td>42</td>
<td>48</td>
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<tr>
<td>% of population supplied by a single supply system</td>
<td>9</td>
<td>45</td>
<td>46</td>
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<tr>
<td>Unplanned outage</td>
<td>11</td>
<td>52</td>
<td>37</td>
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<tr>
<td>Abstraction Incentive Mechanism</td>
<td>12</td>
<td>52</td>
<td>36</td>
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</table>

Proactive Provincials significantly more likely than Tech-Savvies to rate as high importance.

Hartlepool significantly more likely than Anglian to rate as high importance.

Anglian region significantly more likely than Hartlepool to rate as high importance.

Family First significantly more likely than Tech-Savvies to rate as high importance.

Hartlepool region significantly more likely than Anglian to rate as high importance.
### Importance of Recycling Measures

<table>
<thead>
<tr>
<th>Issue</th>
<th>Low importance</th>
<th>Medium importance</th>
<th>High importance</th>
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<tbody>
<tr>
<td>Sewer collapses</td>
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<td>Pollution incidents</td>
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<td>Internal sewer flooding</td>
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<tr>
<td>External Sewer Flooding</td>
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</tr>
<tr>
<td>Risk of sewer flooding in a storm</td>
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<td>54</td>
</tr>
<tr>
<td>WINEP</td>
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<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>11</td>
<td>51</td>
<td>39</td>
</tr>
<tr>
<td>Natural Capital</td>
<td>9</td>
<td>56</td>
<td>35</td>
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<tr>
<td>Embodied carbon</td>
<td>22</td>
<td>46</td>
<td>31</td>
</tr>
<tr>
<td>Operational carbon</td>
<td>19</td>
<td>55</td>
<td>25</td>
</tr>
</tbody>
</table>

- Comfortable and Caring significantly more likely than Careful Budgeters to rate as **high** importance.
- Protective Provincials significantly more likely than Tech-savvies & Family First to rate as **high** importance.
- Family First significantly more likely than other segments to rate as **high** importance. Essex & Suffolk region also more likely than Anglian.
Importance of retail measures

- **Supporting customers in vulnerable circumstances**
  - Low importance: 3
  - Medium importance: 18
  - High importance: 79

- **Customer measure of experience (CMEX)**
  - Low importance: 5
  - Medium importance: 30
  - High importance: 66

- **Managing void properties**
  - Low importance: 18
  - Medium importance: 39
  - High importance: 43

- **Developer services measure of experience (D-MeX)**
  - Low importance: 9
  - Medium importance: 48
  - High importance: 42

- **Non-household Retailer Satisfaction**
  - Low importance: 27
  - Medium importance: 45
  - High importance: 28

Comfortable and Caring significantly more likely than Tech-Savvies and Family First to rate as high importance.

Cambridge Water significantly more likely than Essex & Suffolk Water to rate as high importance.

Hartlepool significantly more likely than Anglian, Essex & Suffolk to rate high importance.

Tech-Savvies significantly more likely than Careful Budgeters to rate as high importance.

Anglian & Cambridge Water significantly more likely than Hartlepool, Essex & Suffolk Water to rate as high importance.
The majority of customers understand what each of the measures are:

- Abstraction Incentive Mechanism: 94%
- Risk of severe restrictions in a drought: 98%
- Per capita consumption: 99%
- Unplanned outage: 99%
- % of population supplied by a single supply system: 100%
- Properties at risk of persistent low pressure: 100%
- Compliance risk index: 96%
- Water supply interruptions: 99%
- Leakage: 100%
- Mains bursts: 98%
- Reactive Mains Bursts: 98%
- Treatment works compliance: 100%

Businesses with low annual water consumption significantly more likely than those with high consumption to understand measure.

Q24, 28, 32, 36, 40, 44, 48, 52, 56, 60, 64, 68, 70. Base: Total 96
Understanding of **water recycling** measures

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Internal sewer flooding</td>
<td>98%</td>
</tr>
<tr>
<td>External Sewer Flooding</td>
<td>99%</td>
</tr>
<tr>
<td>Risk of sewer flooding in a storm</td>
<td>98%</td>
</tr>
<tr>
<td>Operational carbon</td>
<td>99%</td>
</tr>
<tr>
<td>Embodied carbon</td>
<td>96%</td>
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<tr>
<td>Sewer collapses</td>
<td>100%</td>
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<tr>
<td>Pollution incidents</td>
<td>100%</td>
</tr>
<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>99%</td>
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<tr>
<td>Natural Capital</td>
<td>99%</td>
</tr>
<tr>
<td>WINEP</td>
<td>97%</td>
</tr>
</tbody>
</table>

Businesses with low annual water consumption significantly more likely than those with high consumption to understand measures.

---

41 Q72, 74, 76, 78, 80, 82, 84, 86, 88, 90, 92, 94, 96, 98, 100, 102, 104, 106, 108, 110. Base: Total 103
Understanding of customer service measures

- Customer measure of experience (CMEX): 96%
- Developer services measure of experience (D-MeX): 99%
- Supporting customers in vulnerable circumstances – PSR: 100%
- Supporting customers in vulnerable circumstances – Panel Assessment: 98%
- Managing void properties: 99%
- Non-household Retailer Satisfaction: 99%

Q112, 114, 116, 118, 120, 122, 120b, 122b, 124, 126, 128, 130. Base: Total 99
Whether **water measure** targets are sufficiently stretching

- **Abstraction Incentive Mechanism**: 78% Yes, 6% No, 16% Don't Know
- **Risk of severe restrictions in a drought**: 90% Yes, 6% No, 4% Don't Know
- **Per capita consumption**: 82% Yes, 14% No, 4% Don't Know
- **Unplanned outage**: 71% Yes, 22% No, 7% Don't Know
- **% of population supplied by a single supply system**: 95% Yes, 3% No, 2% Don't Know
- **Properties at risk of persistent low pressure**: 92% Yes, 6% No, 2% Don't Know
- **Compliance risk index**: 83% Yes, 9% No, 9% Don't Know
- **Water supply interruptions**: 93% Yes, 4% No, 3% Don't Know
- **Leakage**: 83% Yes, 13% No, 4% Don't Know
- **Mains bursts**: 69% Yes, 29% No, 2% Don't Know
- **Reactive Mains Bursts**: 76% Yes, 20% No, 4% Don't Know
- **Treatment works compliance**: 88% Yes, 11% No, 1% Don't Know

- **Businesses with small bills** more likely than those with medium sized bills to say targets stretching for properties at risk of persistent low pressure.
- **Those with large bills** significantly more likely than those with small and medium bills to say targets are **not** stretching for leakage and treatment works compliance.
- **Businesses with less than 4 employees** significantly more likely than those with 50-249 employees to say targets are stretching for reactive mains bursts.

---

Q26, 30, 34, 38, 42, 46, 50, 54, 58, 62, 66, 68, 70. Base: Total 96
Whether water measure targets are sufficiently stretching

<table>
<thead>
<tr>
<th>Measure</th>
<th>NHH customers who understood measures were significantly more likely than HH to say that targets are sufficiently stretching for 5 of the measures:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstraction Incentive Mechanism</td>
<td>% of population supplied by a single supply system</td>
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<tr>
<td>Risk of severe restrictions in a drought</td>
<td>Properties at risk of persistent low pressure</td>
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<tr>
<td>Per capita consumption</td>
<td>Compliance risk index</td>
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<tr>
<td>Unplanned outage</td>
<td>Water supply interruptions</td>
</tr>
<tr>
<td>% of population supplied by a single supply system</td>
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<tr>
<td>Properties at risk of persistent low pressure</td>
<td></td>
</tr>
<tr>
<td>Compliance risk index</td>
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<tr>
<td>Water supply interruptions</td>
<td></td>
</tr>
<tr>
<td>Leakage</td>
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<tr>
<td>Mains bursts</td>
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</tr>
<tr>
<td>Reactive Mains Bursts</td>
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<tr>
<td>Treatment works compliance</td>
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</table>

Q26, 30, 34, 38, 42, 46, 50, 54, 58, 62, 66, 68, 70. Base: Abstraction Incentive Mechanism 90; Risk of severe restrictions in a drought 94; Per capita consumption 95; Unplanned outage 95; Percentage of population supplied by a single supply system 96; Properties at risk of persistent low pressure 96; Compliance risk index 99; Water supply interruptions 102; Leakage 103; Mains bursts 101; Reactive Mains Bursts 101; Treatment works compliance 103
Whether **water recycling** targets are sufficiently stretching

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<th>Category</th>
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<th>Don't Know</th>
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<tr>
<td>External Sewer Flooding</td>
<td>61</td>
<td>34</td>
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</tr>
<tr>
<td>Risk of sewer flooding in a storm</td>
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<td>22</td>
<td>9</td>
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<tr>
<td>Operational carbon</td>
<td>79</td>
<td>16</td>
<td>6</td>
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<tr>
<td>Embodied carbon</td>
<td>75</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>Sewer collapses</td>
<td>67</td>
<td>27</td>
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<tr>
<td>Pollution incidents</td>
<td>76</td>
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<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>67</td>
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<td>Natural Capital</td>
<td>73</td>
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<td>WINEP</td>
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</table>

- Businesses with low water consumption significantly more likely than those with high consumption to say targets are sufficiently stretching for embodied carbon.
- ‘Services’ sector significantly more likely than ‘Production & Construction’ to say targets for bathing water attaining excellent status are stretching.

Q74, 78, 82, 86, 90, 94, 98, 102, 106, 110. Base: Total 104
Whether **water recycling** targets are sufficiently stretching

<table>
<thead>
<tr>
<th>Measure</th>
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<th>Don't Know</th>
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<tbody>
<tr>
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<tr>
<td>External Sewer Flooding</td>
<td>62</td>
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<tr>
<td>Risk of sewer flooding in a storm</td>
<td>69</td>
<td>22</td>
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<tr>
<td>Operational carbon</td>
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<td>16</td>
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<td>Embodied carbon</td>
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<tr>
<td>Sewer collapses</td>
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<tr>
<td>Pollution incidents</td>
<td>76</td>
<td>22</td>
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<tr>
<td>Bathing Waters Attaining Excellent Status</td>
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<td>WINEP</td>
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<table>
<thead>
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<th>Don’t Know</th>
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<td></td>
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</tbody>
</table>

NHH customers significantly more likely than HH to say that targets are sufficiently stretching for 4 of the measures:

- Operational carbon
- Embodied carbon
- Bathing waters attaining excellent status
- WINEP

Q80, 84, 88, 92, 96, 100, 104, 108, 112, 116. Base: Internal sewer flooding 101; External Sewer Flooding 102; Risk of sewer flooding in a storm 101; Operational carbon 102; Embodied carbon 99; Sewer collapses 99; Pollution incidents 99; Bathing Waters Attaining Excellent Status 98; Natural Capital 98; WINEP 96
Whether **customer service** targets are sufficiently stretching

<table>
<thead>
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<th>Area</th>
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<tr>
<td>Customer measure of experience (CMEX)</td>
<td>79</td>
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<td>6</td>
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<tr>
<td>Developer services measure of experience (D-MeX)</td>
<td>77</td>
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<tr>
<td>Supporting customers in vulnerable circumstances – PSR</td>
<td>90</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Supporting customers in vulnerable circumstances – Panel Assessment</td>
<td>90</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Managing void properties</td>
<td>80</td>
<td>18</td>
<td>2</td>
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<tr>
<td>Non-household Retailer Satisfaction</td>
<td>81</td>
<td>10</td>
<td>9</td>
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</tbody>
</table>
Whether **customer service** targets are sufficiently stretching

<table>
<thead>
<tr>
<th>Measure</th>
<th>Yes</th>
<th>No</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer measure of experience (CMEX)</td>
<td>80</td>
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<td>5</td>
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<tr>
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<td>7</td>
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<tr>
<td>Supporting customers in vulnerable circumstances – Panel Assessment</td>
<td>90</td>
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<td>2</td>
</tr>
<tr>
<td>Managing void properties</td>
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<td>17</td>
<td>2</td>
</tr>
<tr>
<td>Non-household Retailer Satisfaction</td>
<td>82</td>
<td>10</td>
<td>8</td>
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</tbody>
</table>

NHH customers significantly more likely than HH to say that targets are sufficiently stretching for 3 of the measures:

- CMEX
- Supporting customers in vulnerable circumstances – PSR
- Supporting customers in vulnerable circumstances – Panel Assessment
Importance of water measures

<table>
<thead>
<tr>
<th>Category</th>
<th>Low importance</th>
<th>Medium importance</th>
<th>High importance</th>
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</thead>
<tbody>
<tr>
<td>Mains bursts</td>
<td>19</td>
<td>81</td>
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<tr>
<td>Leakage</td>
<td>21</td>
<td>79</td>
<td>0</td>
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<tr>
<td>Reactive Mains Bursts</td>
<td>29</td>
<td>71</td>
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<td>Compliance risk index</td>
<td>4</td>
<td>65</td>
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<tr>
<td>Risk of severe restrictions in a drought</td>
<td>5</td>
<td>60</td>
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<tr>
<td>Treatment works compliance</td>
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<td>44</td>
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<tr>
<td>Water supply interruptions</td>
<td>10</td>
<td>50</td>
<td>41</td>
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<tr>
<td>Unplanned outage</td>
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<td>46</td>
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<tr>
<td>Abstraction Incentive Mechanism</td>
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<tr>
<td>Properties at risk of persistent low pressure</td>
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<td>44</td>
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<tr>
<td>Percentage of population supplied by a single...</td>
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</tr>
<tr>
<td>Per capita consumption</td>
<td>6</td>
<td>44</td>
<td>50</td>
</tr>
</tbody>
</table>

‘Wholesale & Retail Trade’ sectors more likely than ‘Finance and Insurance Activities’ to rate as high importance. Also businesses with small bills more likely to rate as high importance compared to those with medium sized bills.

High water consumption companies significantly more likely than low consumption companies to rate as low importance.
## Importance of Recycling Measures

<table>
<thead>
<tr>
<th>Category</th>
<th>Low importance</th>
<th>Medium importance</th>
<th>High importance</th>
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<tbody>
<tr>
<td>Pollution incidents</td>
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<tr>
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<td>7</td>
<td>13</td>
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<tr>
<td>External Sewer Flooding</td>
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<td>79</td>
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<tr>
<td>Risk of sewer flooding in a storm</td>
<td>7</td>
<td>45</td>
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<tr>
<td>Bathing Waters Attaining Excellent Status</td>
<td>9</td>
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<tr>
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<tr>
<td>Natural Capital</td>
<td>6</td>
<td>61</td>
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<tr>
<td>Operational carbon</td>
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<td>56</td>
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<tr>
<td>Embodied carbon</td>
<td>17</td>
<td>52</td>
<td>30</td>
</tr>
</tbody>
</table>

### Analysis

- Businesses with medium sized bills significantly more likely than those with small to rate as **low importance**.
- Businesses with less than 4 employees significantly more likely than those with 4 to 49 to rate as **low importance**.

---

Q132. Base: Total 103
### Importance of Retail Measures

<table>
<thead>
<tr>
<th>Measure</th>
<th>Low Importance</th>
<th>Medium Importance</th>
<th>High Importance</th>
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<tr>
<td>Supporting customers in vulnerable circumstances - PSR</td>
<td>3</td>
<td>30</td>
<td>67</td>
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<tr>
<td>Customer measure of experience (CMEX)</td>
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<td>Developer services measure of experience (D-MeX)</td>
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<td>Supporting Customers In Vulnerable Circumstances – Panel Assessment</td>
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<td>Non-household Retailer Satisfaction</td>
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<tr>
<td>Managing void properties</td>
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UNIFORMED BP acceptability

Segment

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Region

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Q16segment. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182

Q16region. Base: Anglian Water 1,002; Hartlepool Water 200; Cambridge Water 217; Essex & Suffolk Water 200
## INFORMED BP acceptability

### Segment

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<th>+13%</th>
<th>+5%</th>
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<tr>
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<tr>
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<table>
<thead>
<tr>
<th>Change once informed</th>
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<tbody>
<tr>
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</tr>
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<td>Unacceptable</td>
</tr>
<tr>
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<tr>
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### Region

<table>
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<tr>
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<th>+4%</th>
<th>+4%</th>
<th>+15%</th>
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<td>Hartlepool Water</td>
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<td>Cambridge Water</td>
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<tr>
<td>Essex &amp; Suffolk Water</td>
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</table>

Q139 segment. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182

Q139 region. Base: Anglian Water 1,002; Hartlepool Water 200; Cambridge Water 217; Essex & Suffolk Water 200
### UNINFORMED BP affordability

#### Segment

<table>
<thead>
<tr>
<th>Segment</th>
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<th>No very affordable</th>
<th>Not at all affordable</th>
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<td>Tech-savvies</td>
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<td>Comfortable and caring</td>
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#### Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Very affordable</th>
<th>Affordable</th>
<th>Neither</th>
<th>No very affordable</th>
<th>Not at all affordable</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anglian Water</td>
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<tr>
<td>Hartlepool Water</td>
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<td>Cambridge Water</td>
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<tr>
<td>Essex &amp; Suffolk Water</td>
<td>13</td>
<td>41</td>
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</tbody>
</table>

Q16a. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182

Q16ar. Base: Anglian Water 1,002; Hartlepool Water 200; Cambridge Water 217; Essex & Suffolk Water 200
## INFORMED BP affordability

### Segment

<table>
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<tr>
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<th>+2%</th>
<th>+13%</th>
<th>+13%</th>
<th>+7%</th>
<th>+5%</th>
<th>+7%</th>
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</thead>
<tbody>
<tr>
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<tr>
<td><strong>Neither</strong></td>
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<tr>
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<td>13</td>
<td>16</td>
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<td></td>
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<td>22</td>
<td>19</td>
</tr>
<tr>
<td><strong>Don't know</strong></td>
<td></td>
<td></td>
<td>56</td>
<td>54</td>
<td>37</td>
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</tr>
</tbody>
</table>

**Tech-savvies**

**Comfortable and caring**

**Eco economisers**

**Family first**

**Careful budgeters**

**Protective provincials**

### Region

<table>
<thead>
<tr>
<th>Region</th>
<th>+5%</th>
<th>+11%</th>
<th>+6%</th>
<th>+12%</th>
</tr>
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<tbody>
<tr>
<td><strong>Anglian Water</strong></td>
<td>22</td>
<td>45</td>
<td>27</td>
<td>19</td>
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<tr>
<td><strong>Hartlepool Water</strong></td>
<td>10</td>
<td>54</td>
<td></td>
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</tr>
<tr>
<td><strong>Cambridge Water</strong></td>
<td>19</td>
<td>48</td>
<td>14</td>
<td>24</td>
</tr>
<tr>
<td><strong>Essex &amp; Suffolk Water</strong></td>
<td>9</td>
<td>9</td>
<td>6</td>
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</tr>
</tbody>
</table>
## Customer preference for cost impact

Cost is reflected in bills as it's being undertaken over the next five years
- Tech-savvies: 49
- Comfortable and caring: 46
- Eco economisers: 37
- Family first: 39
- Careful budgeters: 39
- Protective provincials: 52

Cost is reflected in bills for a longer period than the work will take to complete
- Tech-savvies: 39
- Comfortable and caring: 39
- Eco economisers: 46
- Family first: 51
- Careful budgeters: 37
- Protective provincials: 34

Don’t mind
- Tech-savvies: 9
- Comfortable and caring: 9
- Eco economisers: 5
- Family first: 7
- Careful budgeters: 16
- Protective provincials: 4

Don’t know
- Tech-savvies: 4
- Comfortable and caring: 5
- Eco economisers: 12
- Family first: 3
- Careful budgeters: 8
- Protective provincials: 10

---

- **Family First segment significantly more likely than Protective Provincials to prefer a bill increase over a longer period**
- **Careful Budgeters significantly more likely than protective provincials to say don’t mind**

---

Q17 segment. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182
## Complete work over next five years vs defer

<table>
<thead>
<tr>
<th>Segment</th>
<th>Complete work over next five years</th>
<th>Defer some of the work</th>
<th>Don’t mind</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech-savvies</td>
<td>65</td>
<td>21</td>
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<td>Comfortable and caring</td>
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<td>Careful budgeters</td>
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<tr>
<td>Protective provincials</td>
<td>62</td>
<td>26</td>
<td>3</td>
<td>9</td>
</tr>
</tbody>
</table>

- Completing work over the next five years is preferred by all segments.
- Although still the minority, Eco Economisers are most likely to say they’d prefer work to be deferred to later years. Differences NS.

Q19 segment. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182.
Customer preference for cost impact

- Overall, NHH customers prefer costs to be reflected in bills for a longer period.
- Businesses with 4 to 49 employees significantly more likely than those with <4 employees to prefer a bill increase over 5 years.
- Businesses with <4 or 250+ employees more likely than those with 4 to 49 employees to say ‘don’t mind’.

<table>
<thead>
<tr>
<th>Cost is reflected in bills as it's being undertaken over the next five years</th>
<th>Cost is reflected in bills for a longer period than the work will take to complete</th>
<th>Don't mind</th>
<th>Don't know</th>
<th>Total % participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>46</td>
<td>50</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
Three in four NHH customers prefer work to be completed over the next five years.

This preference is unanimous across all business sizes and sectors (except ‘Energy or Water Supply & Service’ who had no particular preference).

Although still the minority, ‘Production & Construction’ businesses significantly more likely than ‘Services’ to prefer some work to be deferred.
Customer preference for investment impact

- Family First and Comfortable and Caring segments significantly more likely than other segments to support £21 increase.
- Tech-savvies, Eco Economisers and Protective Provincials significantly more likely than Family First to support £10 increase.

Q23 segment. Base: Tech-Savvies 451; Comfortable & Caring 525; Economisers 116; Family First 193; Careful Budgeters 152; Protective Provincials: 182.
64% agree/strongly agree that AW cares about the communities it serves. A further 25% are neutral. Less than 10% disagree.

‘Energy or Water Service & Supply’ sectors significantly more likely to disagree strongly that Anglian Water cares about the community it serves than those working in ‘Wholesale & Retail Trade’ and ‘Other Service Activities’
Nearly 60% agree/strongly agree that AW cares about communities it serves. A further 31% are neutral. Less than 10% disagree.

- Hartlepool Water & Cambridge Water customers significantly more likely to think Anglian Water cares about the community it serves than customers living in the AW dual supply region.
- Comfortable & Caring, Family First and Careful Budgeters significantly more likely to strongly agree than Protective Provincials.
- Eco Economisers significantly more likely than all other segments to disagree/strongly disagree.