

Accent

Acceptability and Affordability Testing



Qualitative Research

Rachel Risely/Nancy Curzon
Rachel.Risely@accent-mr.com
3601 Anglian Water

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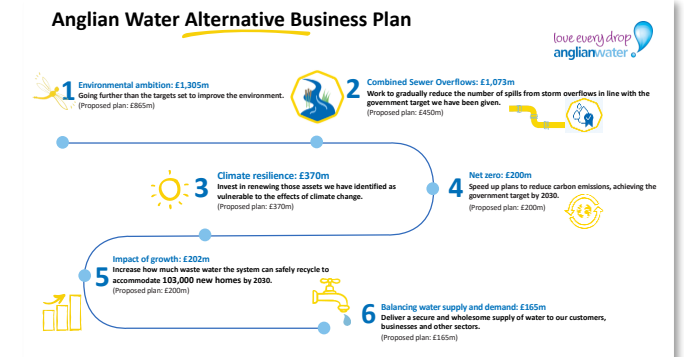
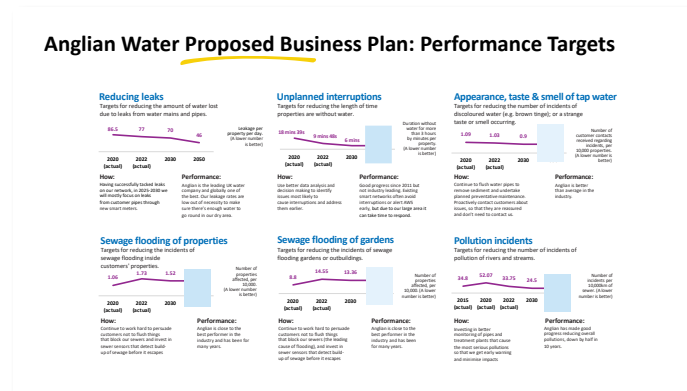
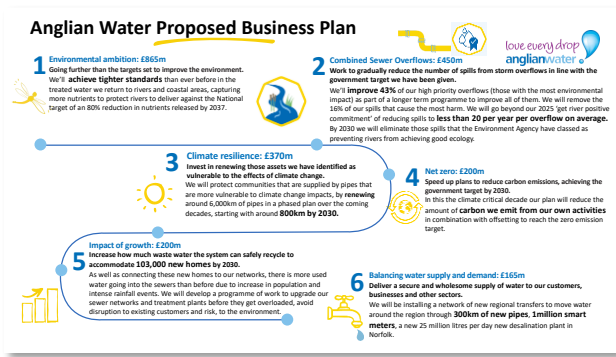
Executive Summary

Executive Summary: Research Background

- Anglian Water commissioned Accent to undertake Acceptability and Affordability Testing research to comply with OFWAT and CCW requirements
- This insight is based on a comprehensive qualitative exercise which tightly followed the regulatory guidance and a quantitative study will follow
- The research exercise comprised extensive and robust deliberation of three potential Business Plans

Proposed Plan
(includes statutory and discretionary service enhancements)

Alternative Plan
(includes only statutory service enhancements)



Meaningful Engagement


- Customers across the Anglian Water region were represented and included households, micro non-households, small-large non-households, customers in vulnerable situations, low-income customers, customers on the Priority Services Register and future customers
- This qualitative research exercise has followed the prescribed methodology and content including building customer knowledge through a pre-task which educated about the industry, the company, Business Plan process, and Proposed Plan investment areas and performance
- Deliberative roundtable discussions, facilitated strong engagement and robust dissection and rich deliberation of the Proposed Plan, and one to one interviews with other key customers groups ensured that insights were meaningful
- Discussion of the Alternative Plan allowed customers to make some trade-offs and judge overall acceptability and affordability of the different options
- There was an opportunity for response via post task which was a useful to anchor to assess final individual affordability and acceptability
- Overall customers accepted there is a trade off in terms of the amount of information that can be shown and understood within the time and appear to make informed decisions with good knowledge
- More context and data was often requested (historical 10-year data trends, previous levels of investment, other elements of the Business Plan or Business as Usual activity e.g. customer satisfaction metrics or Priority Services Register/support for the most vulnerable). There were also some challenges around the choice of Performance Commitments and specific metrics.

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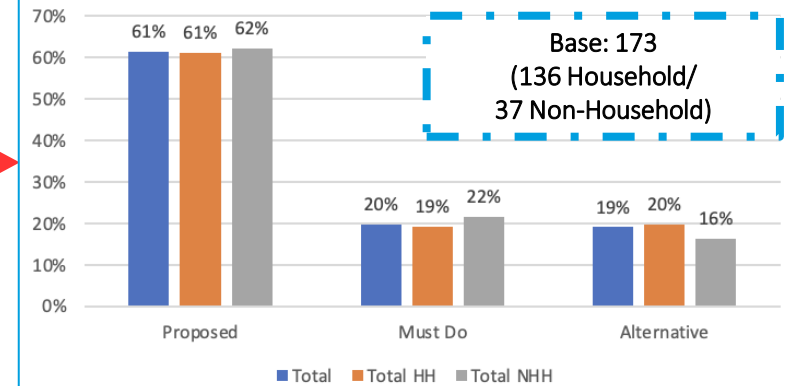
Executive summary: Key insights – Overall Preference

Comparison of all three plans

	Proposed plan	Must do plan	Alternative plan
Performance Commitments			
Enhancements (£ per year by 2030)	<ul style="list-style-type: none"> National Environment Programme for Water (£1.77) Water Resources Management (£11.39) National Environment Programme for Wastewater (£31.54) Making the Water Supply More Reliable (£5.92) Reducing Sewage Flooding from Rare Heavy Rainfall Storms (£2.36) Reducing Basement Flooding from Trunk Mains Bursts (£2.32) 	<ul style="list-style-type: none"> National Environment Programme for Water (£1.77) Water Resources Management (£11.39) National Environment Programme for Wastewater (£31.54) Making the Water Supply More Reliable (£5.92) Reducing Sewage Flooding from Rare Heavy Rainfall Storms (£2.36) Reducing Basement Flooding from Trunk Mains Bursts (£2.32) 	<ul style="list-style-type: none"> National Environment Programme for Water (£1.77) Water Resources Management (£11.39) National Environment Programme for Wastewater (£20.81) Making the Water Supply More Reliable (£5.92) Reducing Sewage Flooding from Rare Heavy Rainfall Storms (£2.36) Reducing Basement Flooding from Trunk Mains Bursts (£2.32)
What is the bill impact? Average annual bill now = £417	<p>£659 by 2030 (up £242)</p> <p>£1,290 by 2050 (up £873)</p>	<p>£642 by 2030 (up £225)</p> <p>£1,047 by 2050 (up £630)</p>	<p>£646 by 2030 (up £229)</p> <p>£1,292 by 2050 (up £875)</p>

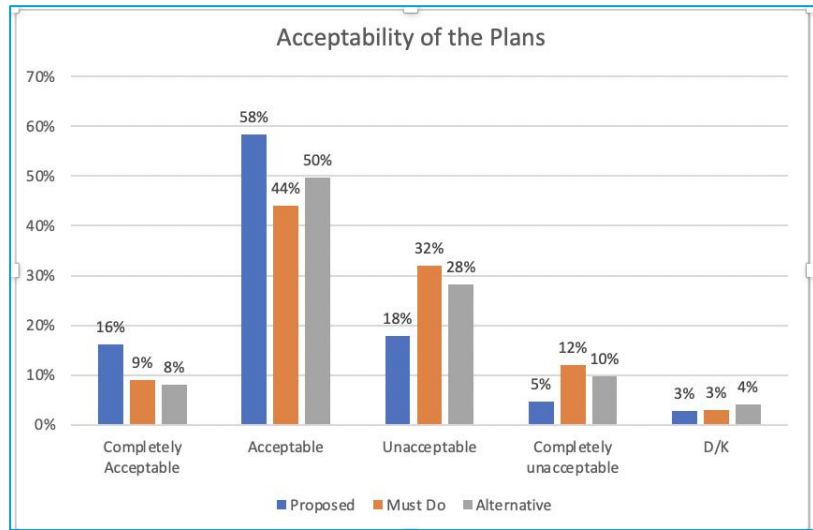
Designed to provide some 'numbers' to understand weights of opinion but is indicative and not representative of Thames Water customer base

Overall which plan do you prefer?



- After long, interactive discussions, customers individually voted and the majority chose the Proposed Plan as their Preferred Plan
- Preference for the Proposed Plan is driven by strong support for a range of service enhancements that address spontaneous concerns around key environmental wastewater issues relating to combined sewer overflows and river pollution, as well as investment to address longer term water security challenges and leakage
- The Proposed Plan provides some reassurance that Thames Water will proactively invest to future proof core infrastructure and ensure longer term network resilience
- This narrative fits with the intergenerational discussion where the majority of customers preferred short term investment proposals that recognise the urgency and need to invest now

Executive summary: Key Insights – Acceptability

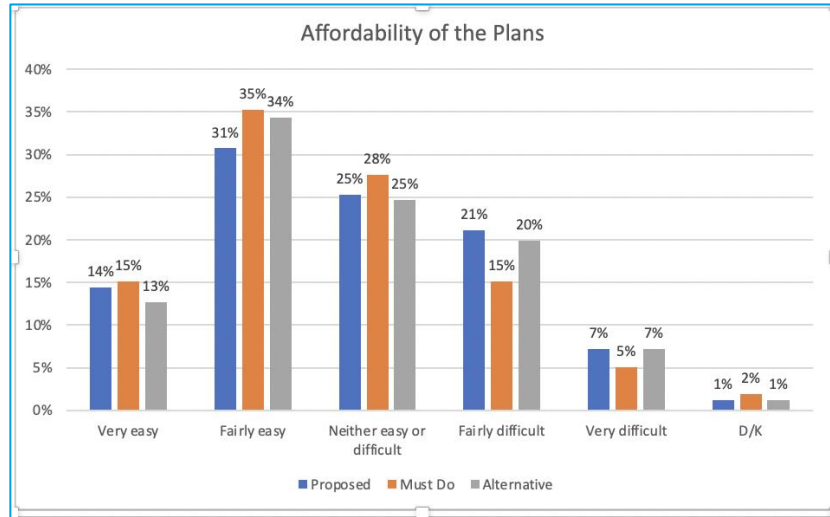


Base: 173
(136 Household/37 Non-Household)

Designed to provide some 'numbers' to understand weights of opinion but is indicative and not representative of Thames Water customer base

- Each plan was reviewed and discussed independently for acceptability and affordability before overall comparisons and preferences were made
- Three quarters of Thames Water customers found the Proposed Plan acceptable which was significantly higher than the Must Do Plan or the Alternative Plan
 - All the plans address the spontaneous environmental priorities (addressing combined sewer overflows, river pollution, protecting wildlife and improving leakage) which was good
 - However, the Proposed Plan felt more proactive, ambitious and was seen to deliver MORE THAN just what's required
 - It was environmentally friendly, good for future generations and focused on the right things
 - It shows Thames Water voluntarily improving the sewer network and focusing on nature-based solutions that are seen as innovative
 - The proactivity provided some reassurance that Thames Water is focused on the long term and fits with the two thirds of customers who favour quicker bill increases to spread investment costs across generations

Executive summary: Key Insights – Affordability



Base: 166
(129 Household/37 Non-Household)

Designed to provide some 'numbers' to understand weights of opinion but is indicative and not representative of Thames Water customer base

- The proportion and distribution of affordability levels is similar across the different plans which is driven by the limited cost differential between the plans by 2030 (£17 difference between Proposed Plan and Must Do Plan)
- Just under half of all customers found the Proposed Plan, which would see the average Household bill rise by £242 by 2030, affordable partly because the water bills are relatively low, it's a vital service and because investment to future proof the network is felt to be crucial
- Around 1 in 3 would find the Proposed Plan bill increase difficult to afford due to the general cost of living crisis, concerns over rising inflation or high water usage. This is especially true of the lower income and financially vulnerable customers
- Compared with the baseline pre-task, more stated this Proposed Plan bill would be fairly or very difficult to afford and want to know whether there will be bill caps to protect low income and 'just about managing' customers who would be adversely affected by the proposed bill increases
- Approximately one quarter of all customers state they would find the bill change neither easy or difficult to afford. This is not a simple measure of affordability and some customers claimed they could afford it but felt that investment should come out of Thames Water profits or cost efficiencies. Others found it too difficult to predict future income levels

Executive Summary: Considerations for the Proposed Plan

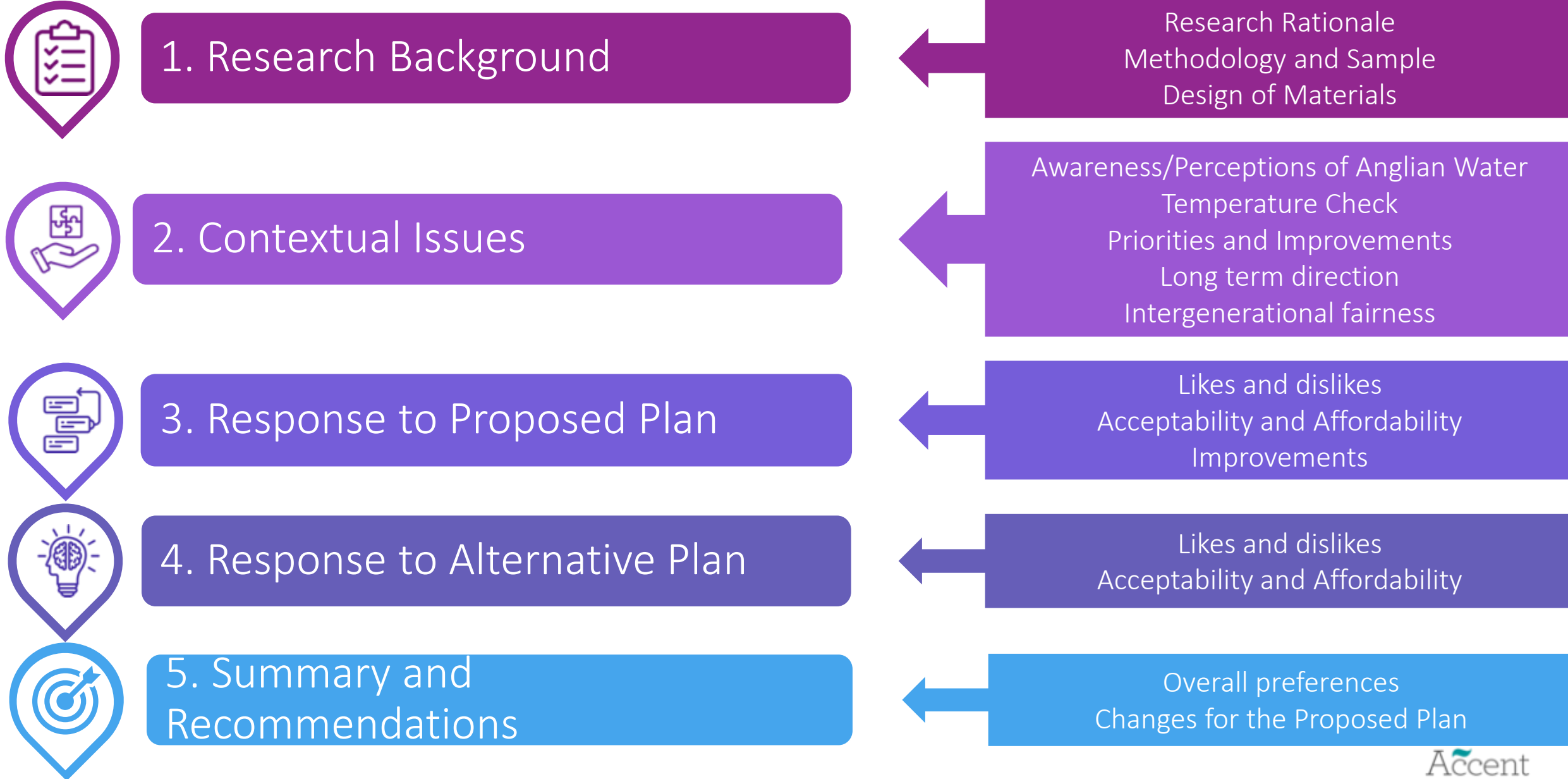
- Although the majority favour the Proposed Plan and three quarters feel it is acceptable, there are areas for consideration including where it was felt the Performance Commitments were not ambitious enough. For example, leakage and river pollution targets. However, no associated bill impact was discussed

PERFORMANCE COMMITMENTS					
	Leakage	Supply Interruptions	Water Quality	Sewage In and Sewage Out	Pollution
Importance	High importance	Medium importance	Medium importance	High importance	High importance
Response to Target	More ambition wanted	Okay/about right	Okay/about right	Targets going in the right direction	More ambition wanted

- In terms of the service enhancements, there were questions over the validity of the basement flooding service enhancement given that the benefit was seen as quite niche. It was felt that the investment could be moved elsewhere for universal benefit

SERVICE ENHANCEMENTS						
	National Environment Programme Water c. £2 pa	Water Resources Management c. £12 pa	National Environment Programme Wastewater c. £32 pa	Reliable Supply c. £6 pa	Rare heavy storms c. £2.50 pa	Basement Flooding c.£2.50 pa
Importance	High	High	High	Medium	High	Low
Support Spend	Support	Support	Support even though high spend	Medium support	Support	Low support – move investment elsewhere

Agenda



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**Research
Background**

Background

- All water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting their plans for the upcoming Price Review (PR24) in October 2023
- To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken
- This guidance has been designed to facilitate consistency and comparability between companies (eg question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme)



This is the first stage of qualitative work to provide core insight across customer segments and inform what Business Plan goes forward to be 'acceptability and affordability' tested in the subsequent Quantitative stage

Research objectives

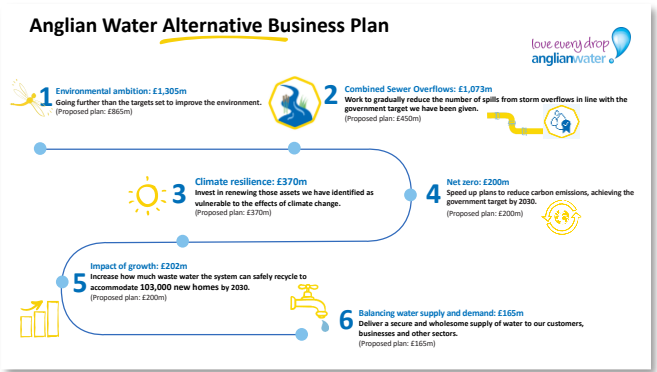
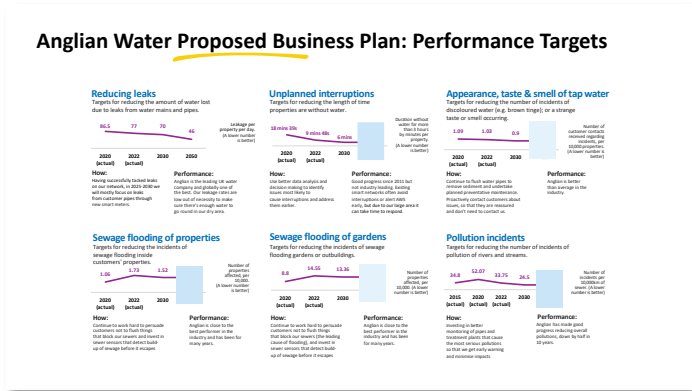
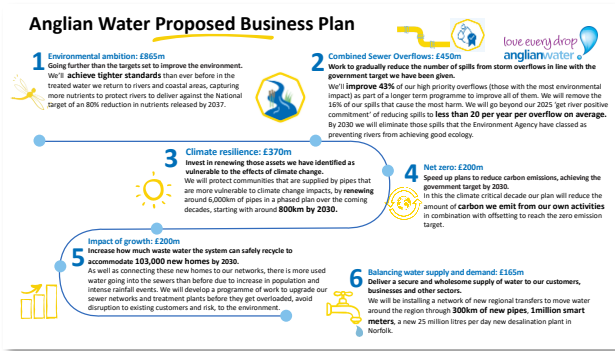
Anglian Water have produced two potential Business Plans for the 2025-2030 Price review period to be tested in line with the Ofwat/CCW guidance

The plans do not include everything that Anglian Water propose to do but, in line with the guidance, they cover proposed targets against six performance commitments and six service enhancements that represent the areas where there will be the most investment and where customers will have a point of view

Plan One is 'The Proposed Plan' that includes 6 Service Enhancements

Both plans include the targets for the six Performance Commitments

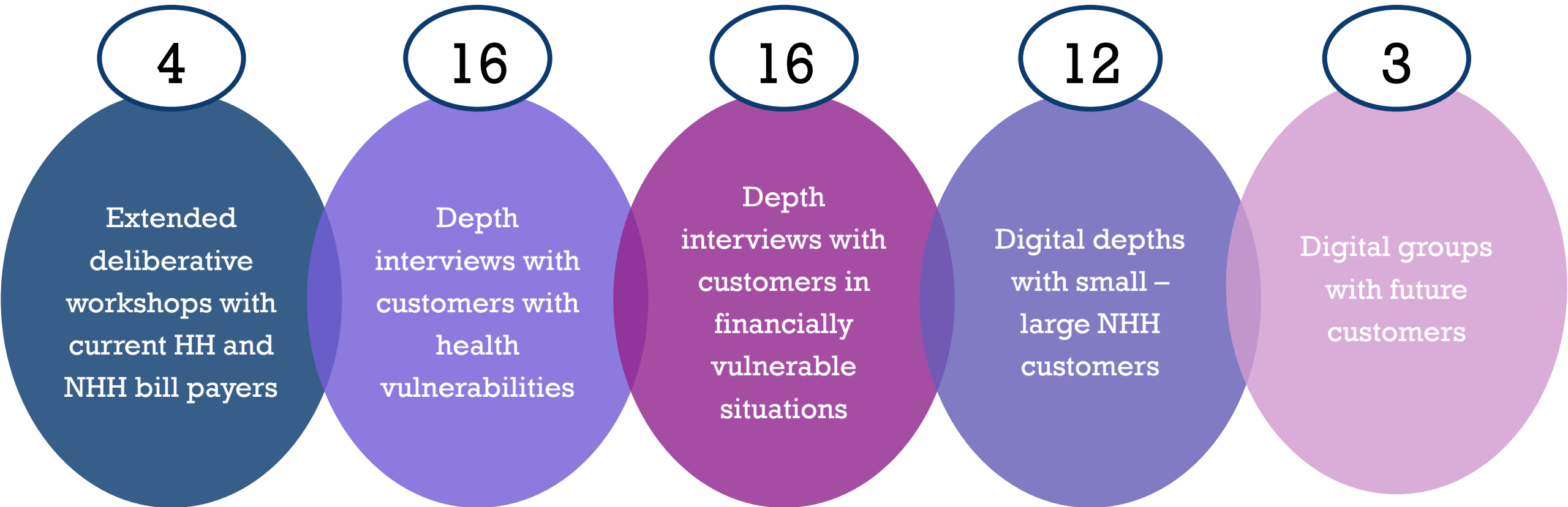
Plan Two is "Alternative Plan" that includes the same Service Enhancements but delivered at a higher price



The research was commissioned to explore customer responses to the Proposed and Alternative Business Plans and decide which plan (or adaptation) will go forward to be tested in the quantitative work
 All research followed the guidelines imposed by OFWAT/CCW and was overseen by the ICG
 Areas where the research deviated from the guidance will be outlined in the final appendix

Qualitative Methodology:

Research method tailored for different audiences



All participants completed the mandated pre-task either via a digital platform or a paper copy depending on participant preference. Majority completed on the digital platform. A total of 144 customers participated in the research (minimum guidance = 96)

Qualitative Sample:

Method Overview

Method	Audience	Location(s)	Number Participated
Deliberative event	Current bill payer	Hartlepool (water only), Chelmsford (waste only), Northampton (dual), Boston (dual)	61
Deliberative event	Micro NHH	Hartlepool (water only), Chelmsford (waste only), Northampton (dual), Boston (dual)	17
Depth interview	Small-large NHH	Various across the different supply areas	12
Depth interview	CIVS (financial and health)	Various across the different supply areas	32
Online groups	Future	Hartlepool, E&SW, Dual	22

144 customers participated across the different methodologies: 93 HH customers, 29 NHH customers and 22 future customers

Depth Interviews:

Sample structure

16 x Depths: Health Vulnerabilities

- 8 customers who are on Anglian Water's PSR due to health vulnerabilities
These were recruited by Roots from lists provided by Anglian Water
- 8 x customers who are eligible for but not currently on, Anglian Water's PSR due to health vulnerabilities
These were free found and recruited by Scout
- 8 interviews with customers in the dual supply area, 4 in the E&SW area and 4 in Hartlepool

16 x Depth Financial Vulnerabilities

- 8 customers who are on Anglian Water's PSR due to health vulnerabilities
These were recruited by Roots from lists provided by Anglian Water
- 8 x customers who are eligible for but not currently on, Anglian Water's PSR due to health vulnerabilities
These were free found and recruited by Roots
- 8 interviews with customers in the dual supply area, 4 in the E&SW area and 4 in Hartlepool

12 x Depths Small-Large NHH

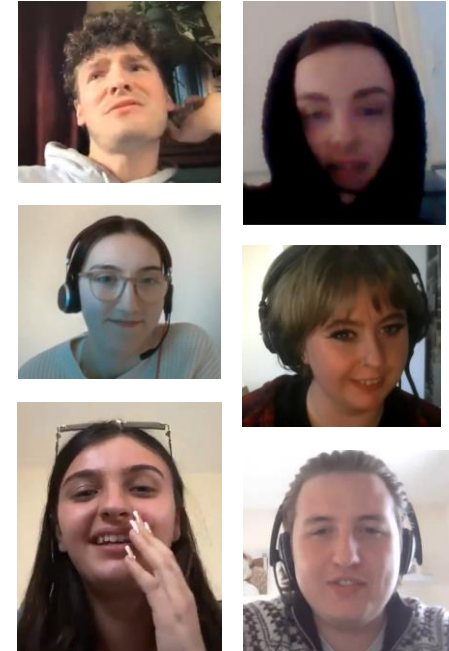
- Mix of sectors represented
- NHH customers from across the different supply areas:
 - 8 x dual
 - 2 x E&SW
 - 2 x Hartlepool
- Recruit by Roots and Scout from a mix of lists and freefound

Digital Groups: Future Customers

3 x Digital Groups

Future	Dual	Hartlepool	E&SW
Age	18-25	18-25	18-25
Working	4	3	4
Studying	4	3	4
Total	8	6	8

- In each group, a mix of ethnicity
- Even mix of genders across the groups
- Mix of living set ups: in the family home, shared student rentals, education accommodation



Fieldwork took place in the last week of April 2023

Four Extended Deliberative Events: Current HH and Micro NHH Customers

Anglian - Future Dual Business Plan Research

On the first slide there is a map of England and Wales that shows Anglian Water's operating area:

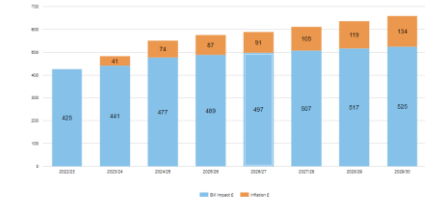
Click the image below to enlarge



If you have any questions then please write in the space below.



Affordability - Anglian Water's Proposed Plan



Thinking about how your income may change in the future, how easy or difficult do you think it would be for you to afford these water and sewerage bills?

- Very easy
- Fairly easy
- Neither easy nor difficult
- Very difficult

Homework exercise undertaken
on bespoke digital platform

Affordability of Water Bill
Anything new/interesting/ surprising
from the homework
Overall impressions (Future)

Extended deliberative events (HH and
micro NHH)

Contextual Issues and Baseline Views
Discussion of Proposed Plan
Discussion of Alternative Plan

Post Task exercise
undertaken on bespoke
digital platform

Affordability/Acceptability of Proposed
Plan and Alternative plan
Preferred Plan
Level of Trust to deliver

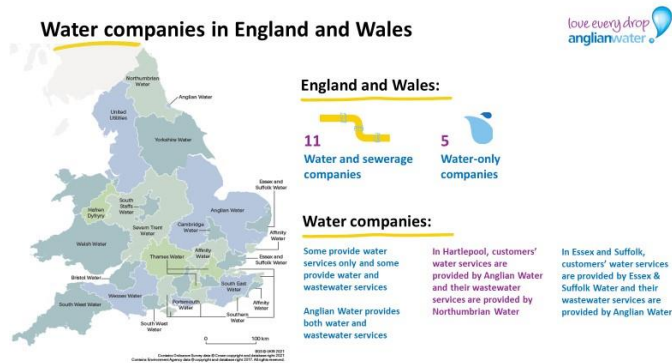
HH customers recruited from lists provided by Anglian Water. Bills in the pre and post tasks based on bill data provided by Anglian Water

NHH customers recruited through a mix of Roots (using lists) and Accent field interviewers (free found)

Events took place on 17th, 18th, 19th and 20th April 2023

Qualitative materials: Materials were developed in line with the guidance, COG tested with all customer groups and shared with the ICG

Background and Regulatory Information



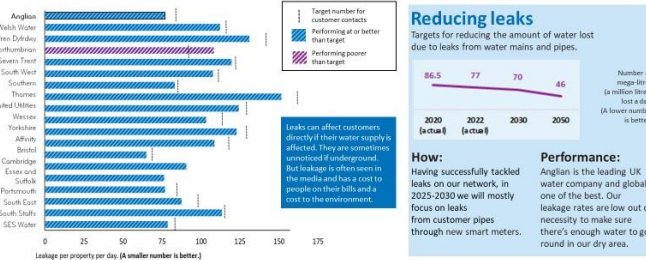
Performance on 6 Key PCs

Reducing leaks

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

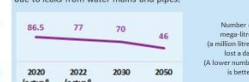
Anglian Water are currently performing at or better than their target

2025-2030 Ambition



Reducing leaks

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



How: Having successfully tackled leaks on our network, in 2025-2030 we will mostly focus on leaks from customer pipes through new smart meters.

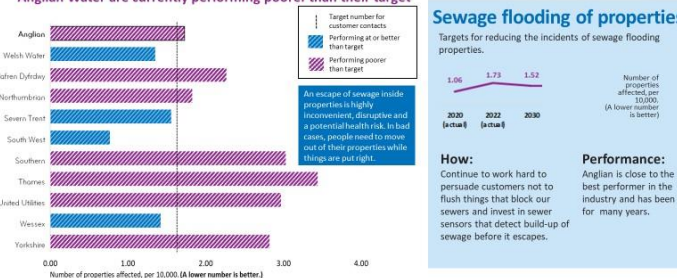
Performance: Anglian is the leading UK water company and globally one of the best. Our leakage rates are low out of necessity to make sure there's enough water to go round in our dry area.

Sewage flooding of properties

Water companies measured on the incidents of sewage flooding properties

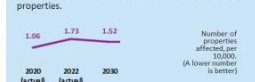
Anglian Water are currently performing poorer than their target

2025-2030 Ambition



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.

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

Why we want to hear from you

Every five years, water companies develop a 'business plan' that sets out how they want to deliver their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do

The business plan and prices are then finalised by Ofwat in a process known as the Price Review. There is more information about this here: <https://www.youtube.com/watch?v=OWMivC93AF8>

Ofwat are a non-ministerial government department that regulate the water sector in England and Wales

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030

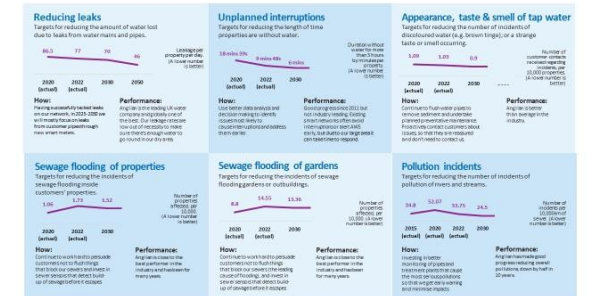
Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them

Proposed Business Plan

Anglian Water Proposed Business Plan



Anglian Water Proposed Business Plan: Performance Targets



Materials were tailored for different audiences e.g. future customers, CIVS, etc
A full set of materials will be in the final appendix

Qualitative structure:

Event topics and deliberative break out discussions covered all mandated topics

- 4pm-4.15pm – Meet, Greet, Seat; Session Introduction
- 4.15pm-5.15pm – Break Out 1 (Warm-up, Recap, Long Term Context, Temperature Check)
- 5.15pm-5.45pm – Comfort/Tea/Coffee/Sandwiches
- 5.45pm-7.00pm – Break out 2 ('Proposed Plan')
- 7.00pm-7.15pm – Tea/coffee break
- 7.15pm-8.15pm – Break Out 3 ('Alternative – Lower Cost')
- 8.15pm-8.30pm – Final plenary session (Post task)



Timings adapted for 3 hour events:
Water only session in Hartlepool
Waste only session in Chelmsford

Final session included a link to the Post Task survey

HH and NHH customers had tailored bill impacts to complete personalised affordability questions that reflected household or business spending

Perspectives:

Everyone was encouraged to think about the Business Plans from different perspectives

Different Perspectives

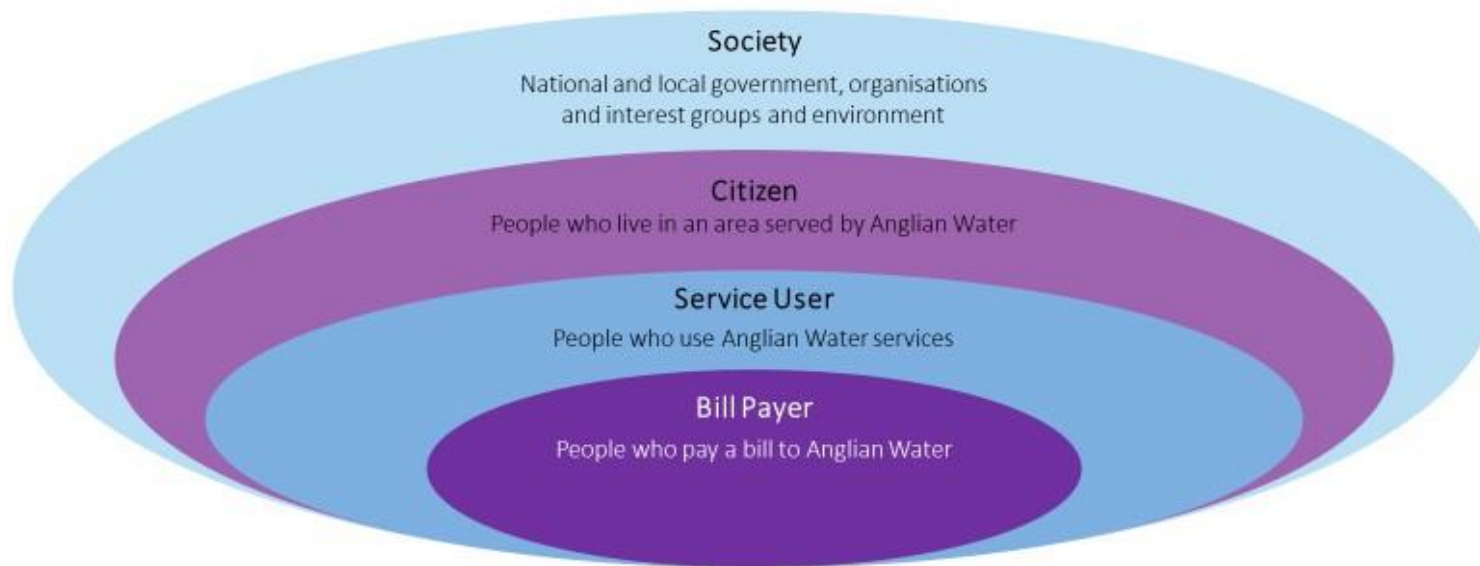


Perspective text was prescribed in the guidance

Examples:

Citizen hats: customers and future customers talked about the impact of the plans on other members of society who might have trouble paying bills

Society hats: customers and future customers talked about the impact of the plan on the natural environment



This process was introduced in the first breakout session when reviewing the long term direction
Customers naturally adopted 'different hats' to think about how the proposals would affect different people/interest groups

The Accent logo features the word "Accent" in a grey serif font. A teal-colored wave-like graphic element is positioned above the letter "c".

Accent

Contextual Issues

Fieldwork undertaken in April 2023 against a backdrop of: economic uncertainty (rising interest rates, soaring inflation, biggest drop of living standards on record, etc) and a water sector under scrutiny in the news particularly around storm overflows and river pollution

EUROPE ECONOMY

UK inflation hits 41-year high of 11.1% as food and energy prices continue to soar

News > UK > UK Politics

UK inflation: Rate makes surprise leap as outlook for government finances 'still grim'

Ofwat seeks new powers to force water companies to clean up rivers by blocking billions in investors payouts

EXCLUSIVE

The regulator is seeking powers to block the payment of dividends if water companies fail to tackle sewage and other issues requiring investment



Failures of regulators, water companies and Government leaving public and environment in the mire

22 March 2023



Under investment, insufficient government strategy, and inadequate co-ordination has resulted in a failure to "treat water with the care and importance it deserves", warns committee.

Press release

Anglian Water fined £2.65m after sewage discharged into North Sea

Largest ever fine imposed for environmental offences in the East region.

From: Environment Agency
Published 28 April 2023



Anglian Water pleaded guilty and was hit with a fine of £2.65m after allowing untreated sewage to overflow into the North Sea following a prosecution brought by the Environment Agency.

A catalogue of failures by the company to manage and monitor effluent at the Joywick Water Recycling Centre in Essex led to sewage being discharged into the sea.

Baseline awareness/perceptions:

Day to day, Anglian Water are not top of mind – no switching permitted, uninterrupted service and relatively affordable bill

What did people know/think about Anglian Water before the pre-task exercise?



Service user perspective:

- Starting points for most = neutral-positive
- Biggest 'service user' issue relates to 'hard water' and impact on appliances/taste/shampoo
- Leakage was an area of concern but those who experienced a problem had found Anglian Water to be responsive (within 24 hours to fix a village leak)
- Problem solving/moment of truth is really strong
- Strong communications and campaigns e.g. Love Every Drop

Bill payer perspective:

- Universally considered to be better/cheaper than gas/electric/broadband
- Customers on support scheme welcome the support

Citizen/societal perspective:

- Many have picked up industry storm overflow issues in media – sewerage in rivers/seas is unacceptable

Service user starting point is positive

Knowledge gained from the pre-task work (performance target performance) makes customers adopt a more critical eye over the Business Plans

Pre-Task Themes:

During the pre-task work, customers learned new things about the industry and about Anglian Water

Industry Specific

Breakdown of Water/Waste companies and how the splits are decided



Involved process of water and wastewater operations



Regulatory process of Business Planning, targeting and penalties/rewards



Common targets for vastly different Water Companies (topography, demography)

Company Specific

Company Size

Largest water and waste water company

Significant geographical coverage (and why Hartlepool)



Performance Targets

Unexpected leakage performance

Pollution of rivers and sewerage incidents is poor



Bill breakdown

Proportion of bill allocated to different areas

Why there is no shareholder dividend/pay out



Investment Plans

Significant investments e.g. Desalination plant in Norfolk and Lincs/Fens reservoirs

Pre-task material provides customers with industry and company information

Observation = it provided an overview of selective elements rather than perfect information (some customers wanted more but others felt there was a lot to get through)

Example of pre-task engagement and responses

Anglian Water Are geographically the largest Water and sewage company in England and Wales, with 1,257 sewage treatment works, more than any other company
Chelmsford, HH

It is surprising to know that when water companies are rewarded the customer faces a small increase on their bills.
Hartlepool, HH

Disappointing that it failed the pollution metric quite significantly
Chelmsford, HH

While there is a goal of river pollution reduction I feel it should be a much quicker time to solve this
Northampton, HH

I was surprised to hear that water comes from such a vast array of boreholes and rivers, and goes through such an extensive testing process
Future

It is commendable that Anglian Water has prioritised the areas where it is currently having a poor performance with regards to its own target
Northampton, HH

That the performance of AW is the 4th worse compared to other water companies for pollution incidents.
Chelmsford, HH

It is disappointing that Anglian Water is performing so poorly against the target set for pollution reduction. It is also disappointing to see their poor performance regarding the sewage flooding of domestic premises
Boston, HH

The breakdown of how my money on the bill is spent was very interesting as this was something I had never known before
Hartlepool, HH

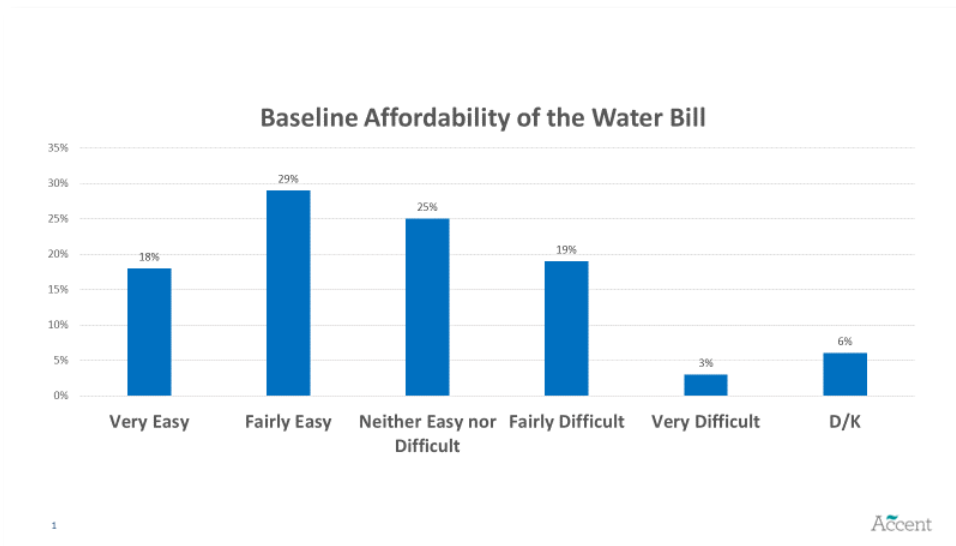
There is no figure in the costings to cover dividend payments to shareholders. Who pays these if not the customer?
Boston, HH

I believe that the net zero targets set by government are unrealistic and much too expensive for companies and consumers to stomach. I would much prefer a more realistic target be set to mitigate against the economic pressures on everyone. The money saved by doing so could go towards further reductions in sewage overflow, floods and pollution.
Boston, HH

Why is Hartlepool covered by Anglian Water? When you look at the map, it's a tiny area surrounded by Northumbrian Water, then Yorkshire, then finally the huge area of Anglian Water?
Hartlepool, HH

Baseline temperature check:

All customers are aware of the challenging economic backdrop but at a household/business level, the water bill is less noticeable than others



- General consensus = the country is in an 'economic crisis'
- Customers are aware of this even if not personally affected:
 - Escalation in food prices affects everyone
 - Energy bills rise without any service related justification
- Range of experiences from:
 - Financially squeezed/struggling = Need help to pay bills, Sought support from companies/families, In touch with agencies
 - JAM/Comfortable = Conscious about spending, Less disposable income but no real lifestyle changes
- Most financially squeezed were getting/seeking support from Anglian Water:
 - About a quarter had some degree of difficulty paying the water bill
 - Of these, most feel that the water bill is 'fairly difficult' to afford
 - Water meters to control/reduce £
 - Water sure or LITE or Extra LITE

Customers were told about 1) Price Review process and 2) Anglian Water use part of any profit to invest back into the infrastructure

Early discussions about the water bill show that investment in the water industry is largely supported – there was a real sense that longer term resilience and infrastructure funding is needed and numerous comments about historic lack of investment which has begun to create a sense of nervousness about future resilience

*I think things are tough but the water bill is a fraction of what makes me scared
Northampton, HH*

*I think it's okay value for money but I can't help but think we are paying for East Anglia up here
Hartlepool, HH*

*I Inflation is imposing on everyone and there needs to be more hope for customers on low incomes
Hartlepool, NHH*

*It's not that expensive but I'm mindful of all the bills for the business at the moment
Northampton, NHH*

*I'm on an airforce and state pension and I've done a detailed analysis of my spending and I'm okay with the water bill
Boston, HH*

*I recognise the challenges and support compulsory metering and that should help bills as well as supply and demand
Boston, NHH*

*We are on universal credit but I've now gone back to work and that's helped with all bills
Northampton, HH*

*I now keep my eyes on the bills but the water bill is considerably smaller than everything else
Boston, HH*

*I'm pretty ignorant about the costs – it comes in and I pay it and my costs have halved since I had a meter installed
Chelmsford, HH*

*They should have increased prices 10 years ago
Northampton, HH*

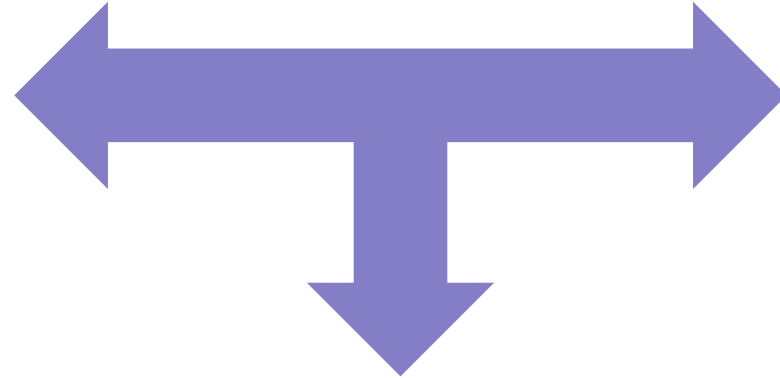
*I expect bills to go up every year to cover the cost of investment in the equipment but you want to see some cost efficiencies through innovation
Chelmsford, HH*

Customers in vulnerable circumstances

Overlap between health circumstances and financial challenges, with participants' health conditions impacting their ability to work at all (or limiting the type/amount of work). HH members' health also impacted work situation and finances

Physical health issues

- Spinal and mobility issues
- Hearing loss
- Asthma and COPD
- Diabetes



Mental health, cognitive and other characteristics

- Depression
- Anxiety
- Learning disabilities and difficulties
- Dementia
- Neurodiverse conditions like autism

Financial challenges

- Cost of Living pressures – *'everything's gone up'*
- - energy bills, broadband, insurances
- Loss of benefits, or only income is benefits
- Transition from full-time to part-time work
- Caring responsibilities mean working less
- No longer working because of ill health
- Relationship breakdown reducing HH income

They need to get the information [on the PSR and support for financially vulnerable customers] out there. They need more literature and more information to let people know about the support on offer.
Health vulnerable customer

It's a struggle to afford things. I was a postman for twenty years but now I'm long-term disabled, the money doesn't cover everything.
Financially vulnerable customer

Not all those with health conditions are struggling financially. Older participants with health conditions may have retired in favourable financial circumstances

Financially vulnerable customer case study

Tracy / 38 / recently single mum with children and a young baby / Norfolk

Living situation

Recently single and now a single parent, Tracy lives in Norfolk with her 8-month-old baby and other children

Working status

Not currently working, having recently had a baby
Prior to having the baby, Tracy worked in retail and plans to return after maternity leave

Financial situation

Tracy's former partner was the chief income earner for the household, but he no longer lives with her
In addition, having recently had a baby means she is not currently working herself
Tracy currently receives Universal Credit and says, *"things are tight"*
She has recently struggled to pay her water bills on time, but feels that Anglian Water are understanding of customers in her circumstances

"Anglian Water are considerate to my situation, compared to energy companies. They're flexible and care about their customers. If I've had to pay my bill late, I've never had any issues with Anglian."

Social tariff status

Tracy is not currently on a social tariff with Anglian

Response to PSR support offered in Business Plan

She was very supportive of the additional level of support offered to elderly customers in, e.g., reading water meters

Response to financial support offered in Business Plan

Tracy was concerned that others struggling financially might be worried about the bill impacts of the proposed business plan, but welcomed the financial support available to those who need it and qualify

"The PSR is brilliant. Really, really good. I'm not sure what they could do anymore than what they're doing already. I think that they are one of the companies that other companies could learn from. I think they've got it right"

NHH Customers:

Range of NHH (industry, size and number of sites) with varying reliance on water

Everyday reliance

Trades – kitchen fitter, bathroom fitter
Property development
Social care
Psychological support services
Accountant

Water usage =

Office use, tea/coffee, flushing toilets, washing hands, cleaning, washing vans

Medium/heavy reliance

Architecture
Graphic design
Manufacturing and industrial
Local Authority
Hairdresser
Hospitality (café, deli, bar)

Water usage =

Office use, tea/coffee/canteen, irrigation, manufacturing process, cooling, product testing (water equipment), supplying commercial and domestic properties (LA), food and drink preparation

In line with the OFWAT and CCW guidance, a range of non-household customers were included – micros (Under 10 staff) were included in the deliberative events and small-large (10 staff and over) who were covered in the depth interviews. Across the sample there were varying reliance on water

NHH challenges

NHH customers outline a number of key challenges; cost is overriding concern (esp. for micro businesses) and focus on survival and short-term business plans

Costs

- Rising staff costs
- Rising material costs
- Rising bills/utilities
- Rising inflation
- Increased rent

People

- Recruitment and retention of staff (particularly in the hospitality sector)
- Client retention
- Low customer footfall (Covid hangover/WAH and cost of living crisis)

Legislation/Regulation

- Health and safety regulation
- Increased insurance
- Environmental regulation and policies

Consistently feel that water is cheaper than gas/electric although there is a concern about potential increases against the backdrop of energy price increases. Looking for reassurance that no price shocks are coming down the line – particularly for high water dependent businesses

Spontaneous Priorities:

Number of areas that customers want to be included in the Business Plan



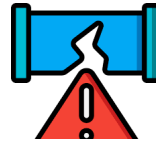
Environment Issues

- CSO related pollution
- Protecting seas and rivers
- Smells from treatment works
- Recognise that this might not be all AW responsibility
- Work with third parties e.g. farmers, manufacturers



Addressing Population Growth

- Address significant increase in housing developments across the region
- Negative impact on all services
- Keen to see AW work with third parties e.g. developers to introduce radical building changes



Leakage

- Address leakage
- Long term pipework investment



Protecting customers in need of help

- Service outages
- Priority services
- Support tariffs



Education

- Smart Meters to educate and change behaviour
- Reduce usage
- Address blockages
- Better connections



Water Quality Problems

- Address limescale issues
- Address hard water content
- Professional recommendation/discounted water softeners or partner with manufacturer



Innovation

- 'Smarter' meters/apps
- Rainwater/grey water
- Catchment systems
- Embracing technology

Unacceptable performance related to CSOs and leakage drives the need for more urgent investment but more generally customers are keen to see brave plans for long term water security and infrastructure

*My dog is a water snob and
won't drink it but neither will
my wife and daughter
Hartlepool, HH*

*Where is the education in water
efficiency and provision of water
efficiency devices
Northampton, NHH*

*Surely this is about investing in the
core infrastructure and stopping
water going down the drains in the
first place
Chelmsford, HH*

*It has to be about addressing the
sewerage floods – it's outrageous
how they water companies can do
this
Boston, HH*

*I wanted to see more innovation –
working with scientists and
environmentalists and farmers and
builders
Northampton, HH*

*Is there anything on grey water
harvesting – that's what I wrote
down
Northampton, HH*

*I think they need to be addressing
the impact of agriculture on the
water quality and the chemicals
Boston, HH*

*It feels like there is a need to educate
customers to help save money by
reducing usage
Hartlepool, HH*

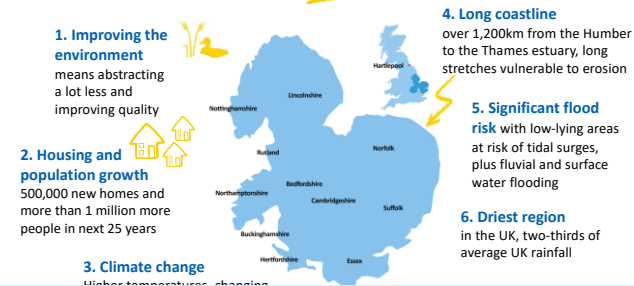
*Focusing on the pipework and the
infrastructure – as a business I can't see how
you can let this kind of thing (leakage) just
happen
Chelmsford, NHH*

*They need to be addressing leakage and
investing in R&D to come out with new
ways to do this
Hartlepool, NHH*

Long term direction:

Customers concur with interlinked challenges esp. climate change which is seen as a significant risk that could impact on service user experience

Long term picture: the challenges we face



1. Helping the environment is positive and customers show greater support for this than seen before (media coverage, David Attenborough affect)
2. Housing growth is noticed everywhere but population figures are significant – concerns over wider infrastructure and water supply
3. Recognise the need to plan and mitigate any drought impact caused by climate change
4. No-one had really thoughts about coastline erosion – seen as a positive opportunity for desalination and something to protect (CSOs)
5. Flooding in some villages plus wider media coverage makes this issue salient
6. Real concerns over being the driest region and reinforce that security of supply is critical

The industry drive to move to longer term planning

The Long Term Delivery Strategy sets the focus and ambition for PR24 and beyond



By 2030, be a net zero carbon business and reduce the carbon in building and maintaining our assets by 70%.

Work with others to achieve significant improvement in ecological quality across our catchments.

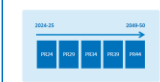


Make the East of England resilient to the risks of drought and flooding.



Enable sustainable economic and housing growth in the UK's fastest growing region.

A genuine focus on the long term



Creation of an adaptive plan

- Net zero by 2030 is expected by many; some feel it's unlikely to make much difference to irreversible climate change (SOME SUPPORT)
- Achieving significant ecological improvements spontaneously requested; concerns about the wildlife and rivers are heard across those who are wildlife hobbyists and those who are more detached (STRONG SUPPORT)
- Resilient to droughts and flooding is critical (STRONG SUPPORT FROM EAST ANGLIA)
- Support CONTROLLED housing – feels like economic growth is outside of Anglian Water's jurisdiction; prefer to see something about partnership and working with Developers

Challenges feel really serious and significant esp in East Anglia

Comments about water shortages 'the next war will be water related, you watch'

Looking for significant policy/cost sharing, incentives for grey water harvesting, surface run off capture, water saving

Long term direction:

Post task response to intergenerational fairness reflects deliberative phasing discussions with the majority preferring to front load the bills and spread increases across generations of bill payers

Option 1 – this really is a 'no brainer' Chelmsford, HH

Phasing of taking water from the environment

love every drop
anglianwater

Option 1

What's the problem?
To supply water their customers, water companies take water from rivers and underground sources known as aquifers. The amount of water they can take is licensed by the Environment Agency. Historically, too much water has been licensed, so water companies are working with the Environment Agency to reduce the amount of water they take. This will help to restore rivers, streams and aquifers.

But water companies still need to supply safe, clean drinking water to their customers. When companies reduce the amount of water they can take from one source, they need to get the water from elsewhere. Sometimes this means they need to build new infrastructure, such as reservoirs, water transfers or desalination plants.

What's already being done?
Anglian Water is committed to looking the environment and has already voluntarily reduced the amount of water it is allowed to take by 85 million litres (enough water to supply two new cities). Between 2025 – 2030, the company will make further reductions that have been agreed with the Environment Agency. It will also look into exactly how and where water should be taken to protect the environment as much as possible.

Choose your future...
After 2030 the company has a choice about how far it goes to protect and improve rivers and streams.

Make further reductions where there is a clear environmental benefit.

Pros:

- Rivers and streams fully restored and improved

Cons:

- More infrastructure needs to be built, including desalination
- Higher emissions (from building new infrastructure)
- Higher costs

Option 2

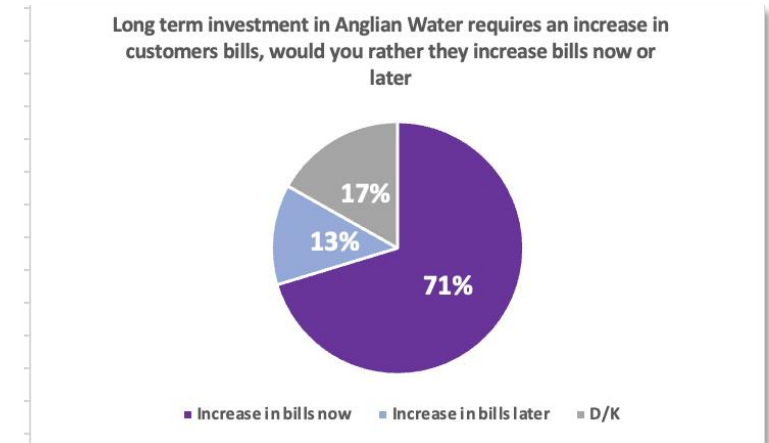
Where it is required by law, work with the Environment Agency to reduce the amount of water Anglian Water is allowed to take from the environment.

Pros:

- Less new infrastructure needs to be built
- Lower emissions (from building less)
- Lower costs

Cons:

- Rivers and streams only partially restored



Reasons for front loading:

- Effects of climate change are more real than ever and starting to be noticed at a HH/NHH level e.g. TUBS, localised flooding
- Water bills are proportionately lower still than others and investment in the water industry has been felt to be prohibitively low
- Older generations want to leave positive legacy for children/grandchildren
- CSOs have heavy coverage in the media and are UNACCEPTABLE

Suggests that there might be an opportunity to go harder and faster and test a bolder Proposed Plan in the quantitative work but there is a risk of lowering acceptance and affordability

Big issue is supply and demand. I mean the growth in the villages mean they are all merging into one Northampton, HH

We have an outdated infrastructure system so we need some longer term investment Chelmsford, NHH

Don't wait for beyond 5 years time – it's difficult enough for the younger generations. £10 doesn't last long now so you can imagine that in the future Northampton, HH

There's nothing new and its all quite generic so I can't argue with it! Northampton, NHH

I don't agree with kicking it down the road for 20 years as that doesn't feel very ambitious Hartlepool, HH

Option 1 sounds great but 500 miles of pipes doesn't seem very much and that's the ambitious version! Hartlepool, HH

It's a good start but its; lacking ambition. It just feels factual e.g. net zero – they have to do this Northampton, NHH

We need to get a good balance of steady investment – not fast now because there has been no investment for the last 10 years Northampton, NHH

Electric and gas is up so much that I'm not working at the moment so it feels that we need to be careful but spreading across generations still works as I have children and grandchildren to think about Boston, HH

The Accent logo features the word "Accent" in a serif font. The letter "A" is a dark grey color, while the "c" is a teal color. A teal wave-like graphic element is positioned above the "c".

Accent

Response to Proposed Plan

Proposed Plan:

Proposed Plan was included in the pre-task for initial consideration and discussed in detail during the second breakout deliberative sessions

Anglian Water Proposed Business Plan



1 Environmental ambition: £865m

Going further than the targets set to improve the environment. We'll **achieve tighter standards** than ever before in the treated water we return to rivers and coastal areas, capturing more nutrients to protect rivers to deliver against the National target of an 80% reduction in nutrients released by 2037.



2 Combined Sewer Overflows: £450m

Work to gradually reduce the number of spills from storm overflows in line with the government target we have been given. We'll **improve 43%** of our high priority overflows (those with the most environmental impact) as part of a longer term programme to improve all of them. We will remove the 16% of our spills that cause the most harm. We will go beyond our 2025 'get river positive commitment' of reducing spills to **less than 20 per year per overflow on average**. By 2030 we will eliminate those spills that the Environment Agency have classed as preventing rivers from achieving good ecology.

3 Climate resilience: £370m

Invest in **renewing those assets we have identified as vulnerable to the effects of climate change**. We will protect communities that are supplied by pipes that are more vulnerable to climate change impacts, by **renewing** around 6,000km of pipes in a phased plan over the coming decades, starting with around **800km by 2030**.



4 Net zero: £200m

Speed up plans to reduce carbon emissions, achieving the government target by 2030. In this the climate critical decade our plan will reduce the amount of **carbon we emit from our own activities** in combination with offsetting to reach the zero emission target.



5 Impact of growth: £200m

Increase how much waste water the system can safely recycle to **accommodate 103,000 new homes by 2030**. As well as connecting these new homes to our networks, there is more used water going into the sewers than before due to increase in population and intense rainfall events. We will develop a programme of work to upgrade our sewer networks and treatment plants before they get overloaded, avoid disruption to existing customers and risk, to the environment.



6 Balancing water supply and demand: £165m

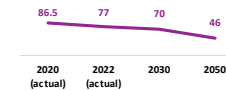
Deliver a secure and wholesome supply of water to our customers, businesses and other sectors. We will be installing a network of new regional transfers to move water around the region through **300km of new pipes, 1million smart meters**, a new 25 million litres per day new desalination plant in Norfolk.



Anglian Water Proposed Business Plan: Performance Targets

Reducing leaks

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

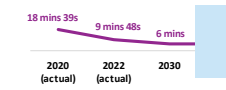


How: Having successfully tackled leaks on our network, in 2025-2030 we will mostly focus on leaks from customer pipes through new smart meters.

Performance: Anglian is the leading UK water company and globally one of the best. Our leakage rates are low out of necessity to make sure there's enough water to go round in our dry area.

Unplanned interruptions

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

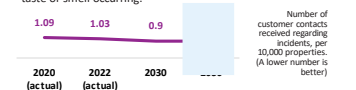


How: Use better data analysis and decision making to identify issues most likely to cause interruptions and address them earlier.

Performance: Good progress since 2011 but not industry leading. Existing smart networks often avoid interruptions or alert AWS early, but due to our large area it can take time to respond.

Appearance, taste & 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.

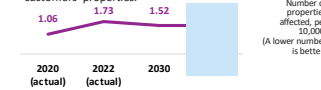


How: Continue to flush water pipes to remove sediment and undertake planned preventative maintenance. Proactively contact customers about issues, so that they are reassured and don't need to contact us.

Performance: Anglian is better than average in the industry.

Sewage flooding of properties

Targets for reducing the incidents of sewage flooding inside customers' properties.

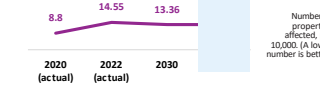


How: Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes

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

Sewage flooding of gardens

Targets for reducing the incidents of sewage flooding gardens or outbuildings.

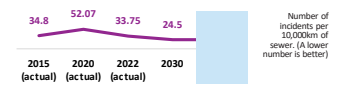


How: Continue to work hard to persuade customers not to flush things that block our sewers (the leading cause of flooding), and invest in sewer sensors that detect build-up of sewage before it escapes

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

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

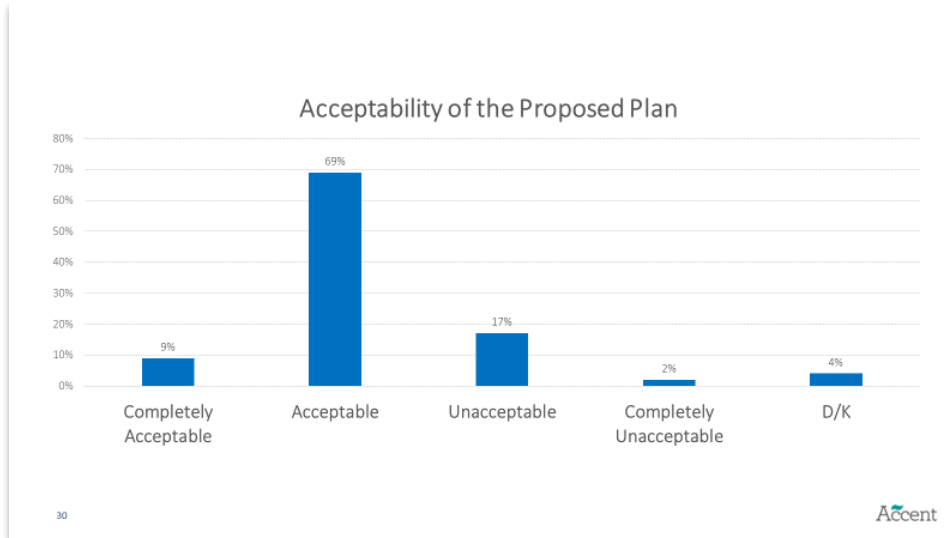
Performance: Anglian has made good progress reducing overall pollution, down by half in 10 years.

Some challenges to the process:

Providing some information to get customers thinking critically but not perfect information e.g. only six performance commitments, lack of long term historical spend data on service enhancements, complete Business Plan, tailoring for Hartlepool

Proposed Plan – Acceptability:

Majority (almost 8 out of 10) across locations found the Proposed Plan acceptable



Dual areas show stronger support which makes sense as they are shown more investment/targets

Top Five – Acceptability Reasons

- 1) Good for future generations
- 2) Focuses on the right things
- 3) Environmentally friendly
- 4) Plan will make big improvements
- 5) Good VFM/Doing a lot for the £

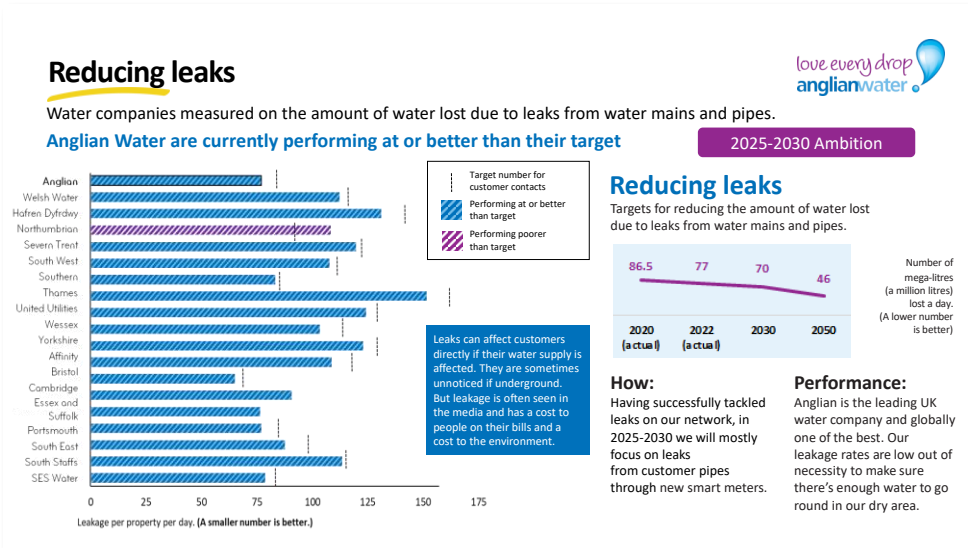
Top Five – Unacceptability Reasons

- 1) Plan won't improve key things
- 2) Not environmentally friendly enough
- 2) Should come out of profits
- 4) Inadequate for future generations
- 4) Too expensive

Strong indications that the Proposed Plan and investment areas are supported by customers – addressing the spontaneous areas that customers had highlighted around environmental protection, CSO spills, infrastructure reinforcement and development to meet increased demand

Proposed Plan Performance Targets - Leakage:

Leakage is an emotive issue but welcome Anglian's positive performance
2025-2030 target could be more ambitious



'Doing really well but could do better. Don't be complacent now'
 Northampton, HH

Overall response to Leakage

- Viewed mostly from a citizen/society perspective
- Leakage is a spontaneous priority area
- Water is a precious resource
- Eliminating wastage and preserving water is critical
- Visible leaks undermine any demand management communications

Performance against Target/Other Companies

- Company performance is really encouraging
- Strong commitment to reduce leaks shown through target and comparisons
- Some challenge the setting of the targets e.g. companies allowed to choose

2025-2030 Target and Long term ambition

- Historic performance looks strong and reassuring – 86-77 in 2 years
- 2025-2030 disappointing in comparison
- Long term ambition (halving leakage) is good and most recognise that there will always be some leakage
- Strong support for the smart meter rollout and helping customers address leakage on their property

Leakage is highly contentious issue but Anglian Water performance and strategy are well received

Explicit language around 'reducing water waste strategic pipe work replacement using new materials plus innovation of smarter network and smart meters' need stronger telegraphing in the quant Business Plan summary

*They are doing well compared to 'competitors'
Northampton, HH*

*This doesn't affect me as a service user and at a wider level Anglian Water seem to be doing really well
Hartlepool, HH*

*Does this include smart pipework as well - on their network
Northampton, NHH*

*It is a big jump when you look at how they have performed over the past few years
Boston, NHH*

*I couldn't let that much of my product just go down the drain
Hartlepool, NHH*

*After I had a smart meter fitted they were in touch with me because my bill was unusually high – I thought that was really good
Northampton, HH*

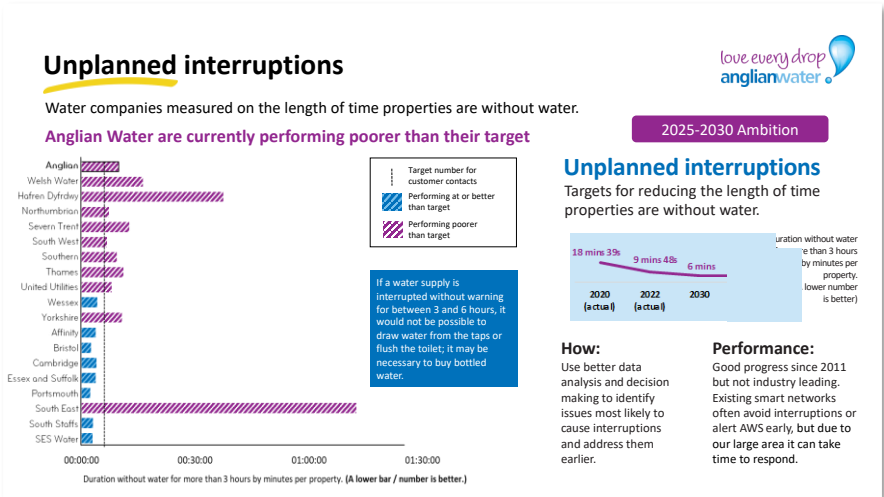
*It's always going to be harder moving forward but still want progress
Boston, HH*

*There needs to be more education around usage and monitoring of water – I want to know more about smart meters
Hartlepool, HH*

Proposed Plan Performance Targets – Interruptions:

Current interruptions performance seems okay despite missing target (past context helpful)

Happy with 2025-2030 target of 6 minutes



Overall response to Supply Interruptions

- Interruptions NOT a spontaneous priority area
- No/limited experience from a service user perspective
- 6 mins good enough from a Citizen perspective

Performance against target/other companies

- Current performance doesn't seem too bad
- Historical context useful to see how performance has improved
- Is the target fair vs. other water companies who have smaller patches
- 'Average' target is confusing, frustrating and creates suspicion

2025-2030 target and long term ambition

- Short term target of 6 minutes is acceptable
- Really encouraging to see the investment in smart networks and proactive strategy

'Recent improvements seem very impressive – if they can keep it at these levels then that good enough'
Boston, NHH

Happy with proposed 2025-2030 targets

Refining language – explaining investment in smart networks, proactivity and protecting those on PSR will be useful for the quant plan PLUS better explanation of the target and rationale for this measure

*They are looking to reduce
by 2/3rd so I support this
Boston, HH*

*Being out of water for 3 hours is
high if you are a business
Hartlepool, NHH*

*Is it really worth investing in this
area – after 2030 they need to stop
and just maintain that position
Northampton, NHH*

*This is unnecessarily
ambitious – it's not an
issue
Boston, HH*

*I don't think this is even an issue up
here
Hartlepool, HH*

*I like the sound of the smart networks
stopping this happening – that's what I
was talking about in the leakage bit
Northampton, HH*

*When you take into account the size
of their patch and the distance they
need to travel, this feels pretty good
Northampton, HH*

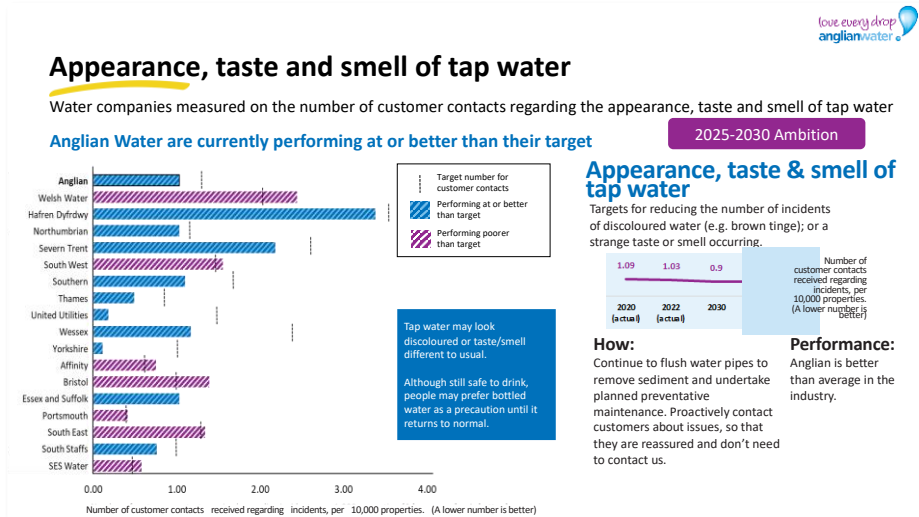
*Hang on – why do they measure it
like that? Over 3 hours or average?
Do we need to take away the number
we first thought of?
Hartlepool, HH*

*With my service user hat then it's
fine as I've never had an issue and
even with my citizen hat I think this
is good enough
Boston, NHH*

Proposed Plan Performance Targets – Water Quality:

Water quality performance is good enough

2025-2030 target is acceptable



Overall response to Water Quality

- Improving water quality was a spontaneous priority area for some customers
- Driven by hard water content/limescale/appliances
- Some customers feel Anglian Water could 'up it's chemicals' and soften the water
- Keen for Anglian Water to help with water softeners/filters
- BUT recognise that it's safe, clean, continual and that personal preference is subjective

Performance against Target/Other Companies

- Current performance is good/acceptable
- Comparative performance also looks good
- Sometimes there is confusion over safety measure

2025-2030 Target and Long term ambition

- Short term target is acceptable
- Strategy to address through improving pipework and maintenance is acceptable/BAU

It's a steady improvement and feels proportionate Hartlepool, HH

Happy with proposed 2025-2030 targets

Potential to explain in the quant about the DWI and reinforce the safety checks and levels currently in place

*This is about right and I don't want them
to be any more ambitious than this
Boston, HH*

*I'm happy with this but I wonder whether it represents the
number of people who aren't happy – I think in this busy
world who calls up about the tap water
Northampton, HH*

*This is okay – I mean its hard
water but that's the area and
the target is fine
Boston, NHH*

*Feels fine – we've got no
issues around this at home
Northampton, HH*

*We get really good quality water at the
moment but the metric seems really
subjective
Hartlepool, NHH*

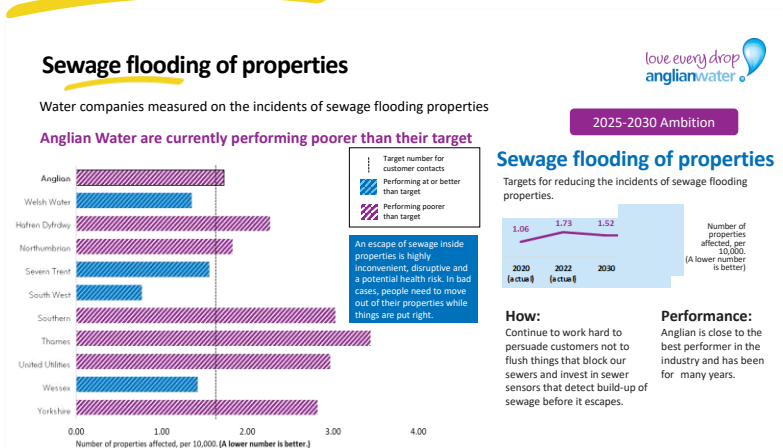
*I can't really drink it without
squash or a filter
Boston, HH*

*I like the fact that they proactively contact
you – they did that to me recently and said it
might be a bit brown but to run the taps –
that was helpful
Hartlepool, HH*

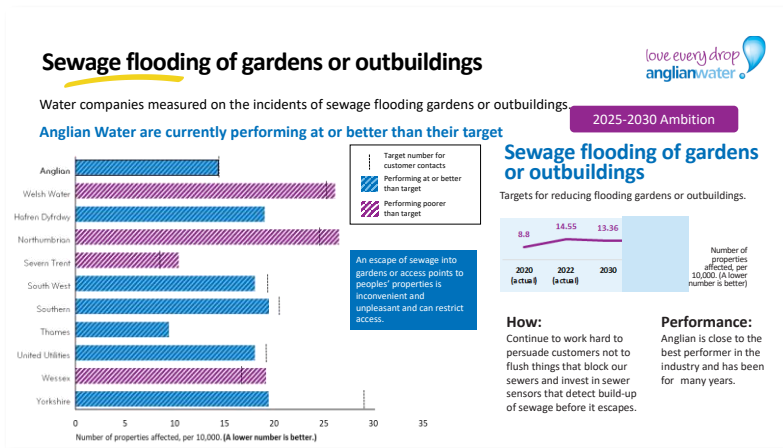
Proposed Plan Performance Targets – Sewage Flooding:

Highly emotive issue that customers want to be swiftly improved

2025-2030 targets does not feel ambitious enough



- ### Overall response to Internal Sewer Flooding
- Improving internal sewer flooding was not a spontaneous priority area for customers
 - Citizen perspective = 'potential health risk' - this is critical to ensure universal positive service
 - Internal worse than external but still a problem area



- ### Performance against Target/Other Companies
- Current performance is unacceptable
 - Missing the target is unacceptable
 - Really don't care whether Anglian is 'close to the best performed in the industry'

- ### 2025-2030 Target and Long term ambition
- 2025-2030 target of 1.52 per 10,000 properties needs context
 - Want to know absolute - how many properties are affected
 - 2030 target is unacceptable given historical information
 - Would like to see more innovative infrastructure changes
 - Would like to see strategy that reduces surface water run off e.g. green roofs, schemes

Not happy with proposed targets and want to see harder/faster
 Information that talks about Anglian Water being close to the best performer is not helpful and space should be used to talk more about strategy

*The extreme rainfall is an ongoing issues so there needs to be a more fundamental change to the infrastructure
Chelmsford, HH*

*I guess I do have some sympathy with the company because the weather conditions have been terrible but no one deserves sewerage in their home
Northampton, HH*

*Of course they should be investing in sensors but it feels like something bigger is needed
Boston, HH*

*50% worse than they were in 2020! Not good enough
Chelmsford, HH*

*I wouldn't wish this on my worst enemy – it's a health risk and needs to be improved urgently
Northampton, HH*

*Need to improve education around this issue and about blockages if that's what's causing the problem
Boston, HH*

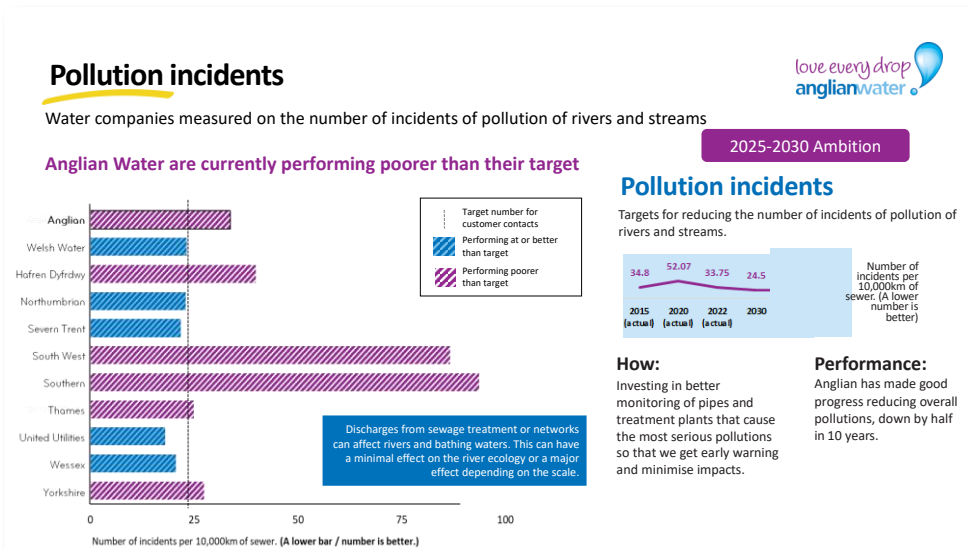
*Why did everything go up in 2022 – weather, well that will keep happening
Chelmsford, NHH*

*How can they be putting forward a target that is not as good as previous performance – that's a backward step
Northampton, NHH*

Proposed Plan Performance Targets – Pollution Incidents:

Media coverage has elevated this issue and customers want radical improvement

2025-2030 target is ambitious (given the 2020 figure but not for those who anchor on the 2015)



Overall response to River Pollution and Streams

- Improving river pollution incidents was a spontaneous priority area for customers
- Also think about bathing waters/seas when they are thinking about this (whether coastal or landlocked)
- Societal and Citizen perspective = protection of the wildlife as well as recreational spaces
- Unsure as to whether this is all Anglian Water’s responsibility

Performance against Target/Other Companies

- Disappointed but expected to see Anglian Water performing worse than the target
- Whole industry performance is really poor

2025-2030 Target and Long term ambition

- 2030 is a significant improvement from 2020
- Feel this is an area that Anglian Water should be collaborating with 3rd parties
- Would like more detail here on how/technological investments

*The games changed and the public just will not accept this crap any more
Chelmsford, HH*

Mixed response but 2025-2030 just about acceptable given 2020 levels - would like to see long term ambitions
Not sure that this is all Anglian Water’s responsibility and want to see more collaborative language and third party partnerships to address this

*Of course it's not ambitious – look at
the 2015 levels
Chelmsford, HH*

*I want them to be doing more but this does feel
quite ambitious given 2020
Northampton, NHH*

*Not good enough – I love wildlife and the
damage this is doing. It needs attention
Boston, HH*

*Monitoring the network feels quite gentle – this is
about biodiversity, ecology as well as quality for
paddling and more needs to be done
Northampton, HH*

*It's such a contentious issue but the numbers
seem okay when you look that they are
halving the number of incidents from now
Chelmsford, NHH*

*Need to push this and make a big
dramatic change
Boston, HH*

Proposed Plan – Service Enhancements:

Strong support for this ‘service enhancement that reflects spontaneous priorities of addressing river/waterways pollution

1 **Environmental ambition: £865m**
Going further than the targets set to improve the environment. We’ll **achieve tighter standards** than ever before in the treated water we return to rivers and coastal areas, capturing more nutrients to protect rivers to deliver against the National target of an 80% reduction in nutrients released by 2037.



- The environment is a spontaneous concern that customers want Anglian Water to address urgently
- Customers were reassured that the greatest spend was focused on environmental issues as reducing river pollution and protecting the waterways was seen to be critical
- ‘Going further than’ = welcomed and supported
- £865m is a huge number but a bit meaningless for customers
- 80% reduction feels high – is this achievable? we have no idea?
- Customers wanted to be reassured that Anglian Water was working with partners and that there would be some financial contribution by other parties

Considerations for Business Plan content:

Improving rivers = strong driver of acceptability and target/investment level feels high

Considerations for Business Plan Presentation:

What are the tighter standards? What will be the positive impact on the fish? How are they collaborating with farmers/industry? What is the customer bill impact of this?

1 Environmental ambition: £865m
Going further than the targets set to improve the environment.
We'll **achieve tighter standards** than ever before in the treated water we return to rivers and coastal areas, capturing more nutrients to protect rivers to deliver against the National target of an 80% reduction in nutrients released by 2037.



*“I know it might not be the same thing but all the starfish are dying on the beach and it feels like we need to be more thoughtful”
Hartlepool, HH*

*“This looks like a noble plan and I can’t argue with it”
Boston, HH*

*“This feels like they are actively preventing contaminants which is good”
Chelmsford, HH*

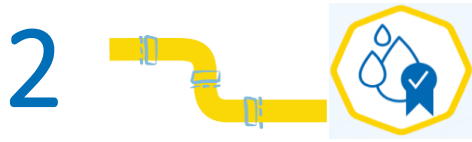
*“This is good and this is ambitious – 80% reduction”
Chelmsford, NHH*

*“Is the technology in place to deliver this – if yes then it’s great”
Boston, HH*

*“I do want to see them going beyond any government target”
Northampton, HH*

Proposed Plan – Service Enhancements:

CSOs seen as a critical area of investment and customers show strong support for this service enhancement



Combined Sewer Overflows: £450m

Work to gradually reduce the number of spills from storm overflows in line with the government target we have been given.

We'll **improve 43%** of our high priority overflows (those with the most environmental impact) as part of a longer term programme to improve all of them. We will remove the 16% of our spills that cause the most harm. We will go beyond our 2025 'get river positive commitment' of reducing spills to **less than 20 per year per overflow on average**. By 2030 we will eliminate those spills that the Environment Agency have classed as preventing rivers from achieving good ecology.

- CSOs are a spontaneous concern that customers want Anglian Water to address urgently
- Negative impact on tourism and recreational activities
- Media coverage has captured customers attention and consensus that this is an unacceptable long term practice
- Strong sense of urgency to address this 'unforgivable practice'
- Some sense that 43% is not enough but this is based on 'gut instinct' vs. any data

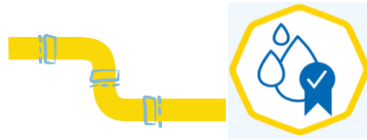
Considerations for Business Plan Content:

Reducing CSOs = strong driver of acceptability; is it possible to go further?

Considerations for Business Plan Presentation:

Simplify text as there are too many numbers (43%, 16%, 20 per year), take out the word gradually, explain difference between overflow and spill

2



Combined Sewer Overflows: £450m

Work to gradually reduce the number of spills from storm overflows in line with the government target we have been given.

We'll **improve 43%** of our high priority overflows (those with the most environmental impact) as part of a longer term programme to improve all of them. We will remove the 16% of our spills that cause the most harm. We will go beyond our 2025 'get river positive commitment' of reducing spills to **less than 20 per year per overflow on average**. By 2030 we will eliminate those spills that the Environment Agency have classed as preventing rivers from achieving good ecology.

"There has been a shift in public opinion and its unacceptable to pump stuff into the sea"
Chelmsford, HH

"There needs to be some better education about flushing things – time for personal responsibility" Chelmsford, HH

"We need some transparency from the water companies about this"
Chelmsford, HH

"Stronger regulation is needed for these CSOs"
Northampton, NHH

"It's critical but I like that they are going to eliminate spills – that feels ambitious and brave language"
Northampton, HH

Proposed Plan – Service Enhancements:

Renewing pipework and investing in infrastructure is key but would like to see stronger ambition e.g. more than 800km out of 6,000km



3 Climate resilience: £370m

Invest in renewing those assets we have identified as vulnerable to the effects of climate change.

We will protect communities that are supplied by pipes that are more vulnerable to climate change impacts, by **renewing** around 6,000km of pipes in a phased plan over the coming decades, starting with around **800km by 2030**.

- Climate change is recognised as a significant issue
- The link between climate change and pipework is understood once explained (freezing pipes, hard ground that can crack, etc)
- Renewing pipework is critical and also felt to positively impact leakage
- The numbers are less convincing - 800km of pipework out of 6,000km feels a 'soft target'
- A real concern when the impact of climate change was felt to be so serious

Considerations for Business Plan Content:

Renewing pipework is a driver of acceptability; is it possible to go further and increase 2030 target

Considerations for Business Plan Presentation:

Change heading to be renewing pipework and then talk about impact of climate change and preventative measures



Climate resilience: £370m

Invest in renewing those assets we have identified as vulnerable to the effects of climate change.

We will protect communities that are supplied by pipes that are more vulnerable to climate change impacts, by **renewing** around 6,000km of pipes in a phased plan over the coming decades, starting with around **800km by 2030**.

*“What is this 15% - not enough in my mind”
Boston, HH*

*“At this rate it will take them forever to replace all the 6,000km”
Northampton, HH*

*“We need to future proof – is this really going far enough”
Chelmsford, HH*

*“This does feel proactive and that is good – they are looking at replacing the most vulnerable pipes”
Boston, HH*

*“Prevention is better than patching – that’s what I say”
Northampton, NHH*

*“This will help leakage as well but 800km feels a bit soft and doesn’t give me that much confidence in the network”
Hartlepool, HH*

Proposed Plan – Service Enhancements:

Net zero is recognised as a statutory target and has support on this basis

4 Net zero: £200m

Speed up plans to reduce carbon emissions, achieving the government target by 2030.

In this the climate critical decade our plan will reduce the amount of **carbon we emit from our own activities** in combination with offsetting to reach the zero emission target.



- Investment in net zero was one of the areas that was less well supported
- Less control over wider emissions
- Majority want Anglian Water to do their bit but some feel that there are other countries/organisations/areas that will make net zero impossible
- Some discussions regarding offsetting – very negative for some people who feel this is a cheat
- Keen to see core carbon reduction


Considerations for Business Plan Content:

Keep as is

Considerations for Business Plan Presentation:

If using 'speed up' then change language to 'before 2030'
Include some specific examples of strategy to achieve net zero; use carbon reduction language

4 Net zero: £200m
Speed up plans to reduce carbon emissions, achieving the government target by 2030.
In this the climate critical decade our plan will reduce the amount of **carbon we emit from our own activities** in combination with offsetting to reach the zero emission target.



*“Is carbon net zero just off setting because I do want them to have strong ambitions and be net zero”
Boston, HH*

*“This is one of those tick box exercises”
Hartlepool, HH*

*“I like the ambition and feel it has to be done”
Northampton, HH*

*“I don’t agree with the idea of offsetting – it feels weak and wooly”
Boston, HH*

Proposed Plan – Service Enhancements:

Strong support for this service enhancement area as it addresses a core challenge – population/housing growth AND increases sewer capacity

5 Impact of growth: £200m

Increase how much waste water the system can safely recycle to accommodate **103,000 new homes by 2030**.



As well as connecting these new homes to our networks, there is more used water going into the sewers than before due to increase in population and intense rainfall events. We will develop a programme of work to upgrade our sewer networks and treatment plants before they get overloaded, avoid disruption to existing customers and risk, to the environment.

- This service enhancement addresses the housing growth seen across the region
- Is there only 103,000 homes planned across the region?
- Updating the wastewater system to reflect projected numbers was felt to be critical
- BUT more proactive collaboration with developers, council at the point of planning
- More discussion with developers to adopt new and innovative practices that separated the rainwater and sewer networks or imaginative in-home/business systems that reduced the amount customer drainage water

Considerations for Business Plan Content:

Upgrading sewer network is a strong driver of acceptability; is it possible to go further?

Considerations for Business Plan Presentation:

Recycling language is a bit confusing; simplify language to 'we will ensure that we upgrade the sewer network to cope with increase in population and respond to intense rainfall events'; include reference to developer collaborations

Impact of growth: £200m

5 Increase how much waste water the system can safely recycle to accommodate **103,000** new homes by 2030.



As well as connecting these new homes to our networks, there is more used water going into the sewers than before due to increase in population and intense rainfall events. We will develop a programme of work to upgrade our sewer networks and treatment plants before they get overloaded, avoid disruption to existing customers and risk, to the environment.

It's good to see this as the new homes are increasing all the time"
Chelmsford, HH

103,000 homes feels a bit low over 5 years across our big area"
Boston, HH

I would like to see more collaboration with developers here"
Northampton, HH

It can't be all Anglian Water's responsibility surely"
Boston, NHH

100k homes sounds very conservative to me – when I saw the map for Anglian Water, it's giant patch they cover"
Northampton, NHH

Proposed Plan – Service Enhancements:

Balancing water supply and demand is a critical service enhancement area

Keen for enough ambition to future proof network



Balancing water supply and demand: £165m

Deliver a secure and wholesome supply of water to our customers, businesses and other sectors.

We will be installing a network of new regional transfers to move water around the region through **300km of new pipes, 1million smart**

6

meters, a new 25 million litres per day new desalination plant in Norfolk.

- This enhancement area addresses one of the primary concerns – securing future supply and meeting demand
- Headline got customers attention
- Smart meter rollout seen as positive although minority of customers wanted this to be optional
- Smart meter and corresponding app important to monitor usage and have more control over bills
- Desalination plant was exciting – customers have talked about this for a long time and this makes sense given the coast line
- Water dependent NHHs especially felt that this was critical to address and were surprised that this was the lowest investment area that was shown

Considerations for Business Plan Content:

Critical area to manage long term supply/demand which is seen to be under pressure

Considerations for Business Plan Presentation:

Very clear and well understood; potential to add something around an app which links with the smart meter and elevates control over spending



6 Balancing water supply and demand: £165m

Deliver a secure and wholesome supply of water to our customers, businesses and other sectors.

We will be installing a network of new regional transfers to move water around the region through **300km of new pipes, 1million smart meters**, a new 25 million litres per day new desalination plant in Norfolk.

“I love the bit about smart meters – I’ve been talking about this for years”

Northampton, HH

“Oh wow a desalination plant. This is really good. I saw this in the homework and was really excited”

Boston, HH

“This feels like a really customer focused - £165m”

Hartlepool, HH

“I have no idea if this is the right amount of spend but I do like what they are proposing here as long as they are addressing leaks at the same time”

Chelmsford, HH

“They should be shouting this from the rooftops”

Northampton, HH

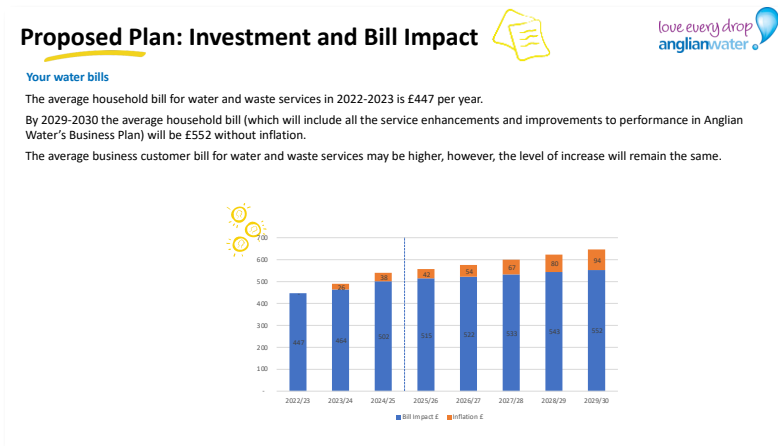
“It just makes sense to me and feels absolutely necessary”

Boston, NHH

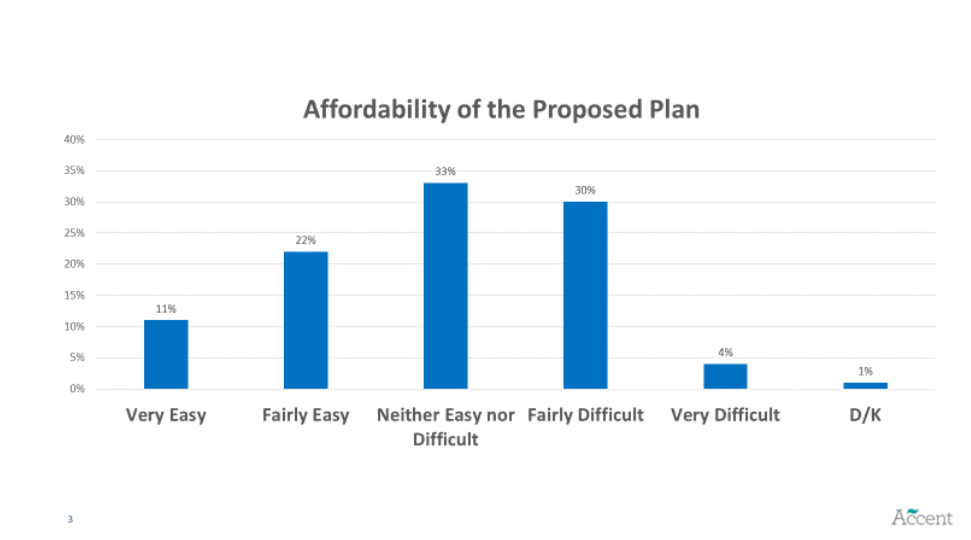
Proposed Plan – Affordability:

Baseline affordability of the current bill = 22% find the current bill fairly/very difficult

With the Proposed Plan increase in bill amounts, a larger proportion (34%) would think the plan would be fairly/very difficult



Average HH bill increase of £447-£552 without inflation and £646 with inflation



- In the qualitative post task, 33% felt the Proposed Plan would be very or fairly easy to afford
- A high proportion (one third) in the post task did not commit to it being affordable or unaffordable – this was reflected in the discussions
 - Wary that income will drop in the short term
 - Difficult to predict life in 5 years
 - Described as ‘reluctantly affordable’
- The gradual increase over the five year period was welcomed

*I don't think we really have a choice
– this is justified investment
Northampton, HH*

*I'm putting on my bill payer hat and
my citizen hat and I give it a high
affordability score – it's spread over 5
years and it's not as big as other bills
Chelmsford, HH*

*I would happily pay for it and
would pay more because it
needs doing
Boston, HH*

*I could afford it – just about but
more importantly they need to do it.
If they don't invest then what
happens?
Hartlepool, HH*

*At least they are telling us what
they are going to be doing – the
electricity companies just put it up
Chelmsford, HH*

*Its not as scary as it seems.
In the context of everything
else and it's the lowest bill
Northampton, NHH*

*Honestly, it doesn't seem too much
in comparison to other utilities
Hartlepool, NHH*

*I say unaffordable just because they
will just keep putting bills up and up
after this
Hartlepool, HH*

Summary of Proposed Plan and Improvements

Acceptability is high with over 8 out of 10 feeling the plan was acceptable

PERFORMANCE COMMITMENTS

	2025-2030
Leakage	Acceptable but could be more ambitious
Supply Interruptions	Acceptable
Water Quality	Acceptable
Sewer Flooding in/Out	Less acceptable, more ambitious in the short term
Pollution in Rivers	Acceptable but could be more ambitious

SERVICE ENHANCEMENTS

	2025-2030	Spend
Rivers/Waterways	Critical	Support high % spend
CSOs	Critical	Keen to go further
Renewing pipework due to climate change	Critical	Improve 800km/6000km
Net zero	Important	Support spend
Upgrading sewers due to housing growth	Critical	Keen to go further than 103,000 properties
Water supply and demand	Critical	Support spend

Affordability of the Proposed plan is the same as baseline affordability of the current water bill

Potential in the quantitative work to tighten some of the language to avoid comprehension issues and strengthen acceptability

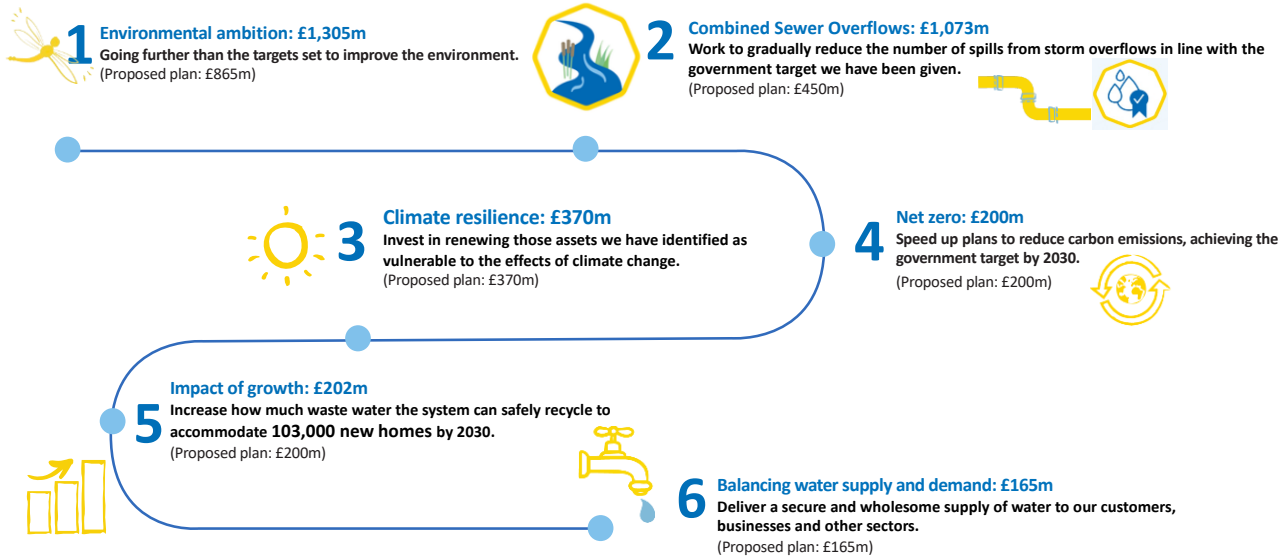


Response to Alternative Plan

Alternative Plan:

Alternative Plan was discussed during the third breakout deliberative sessions and focused on the elements that were different/removed

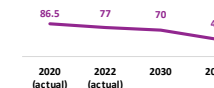
Anglian Water Alternative Business Plan



Anglian Water Proposed Business Plan: Performance Targets

Reducing leaks

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

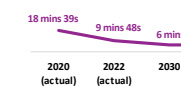


How: Having successfully tackled leaks on our network, in 2025-2030 we will mostly focus on leaks from customer pipes through new smart meters.

Performance: Anglian is the leading UK water company and globally one of the best. Our leakage rates are low out of necessity to make sure there's enough water to go round in our dry area.

Unplanned interruptions

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

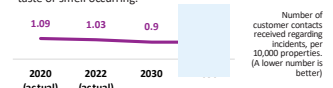


How: Use better data analysis and decision making to identify issues most likely to cause interruptions and address them earlier.

Performance: Good progress since 2011 but not industry leading. Existing smart networks often avoid interruptions or alert AWS early, but due to our large area it can take time to respond.

Appearance, taste & 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.

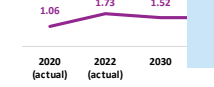


How: Continue to flush water pipes to remove sediment and undertake planned preventative maintenance. Proactively contact customers about issues, so that they are reassured and don't need to contact us.

Performance: Anglian is better than average in the industry.

Sewage flooding of properties

Targets for reducing the incidents of sewage flooding inside customers' properties.

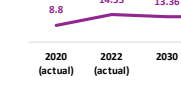


How: Continue to work hard to persuade customers not to flush things that block our sewers and invest in sewer sensors that detect build-up of sewage before it escapes

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

Sewage flooding of gardens

Targets for reducing the incidents of sewage flooding gardens or outbuildings.

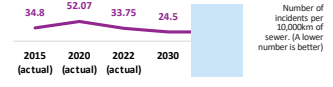


How: Continue to work hard to persuade customers not to flush things that block our sewers (the leading cause of flooding), and invest in sewer sensors that detect build-up of sewage before it escapes

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

Pollution incidents

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

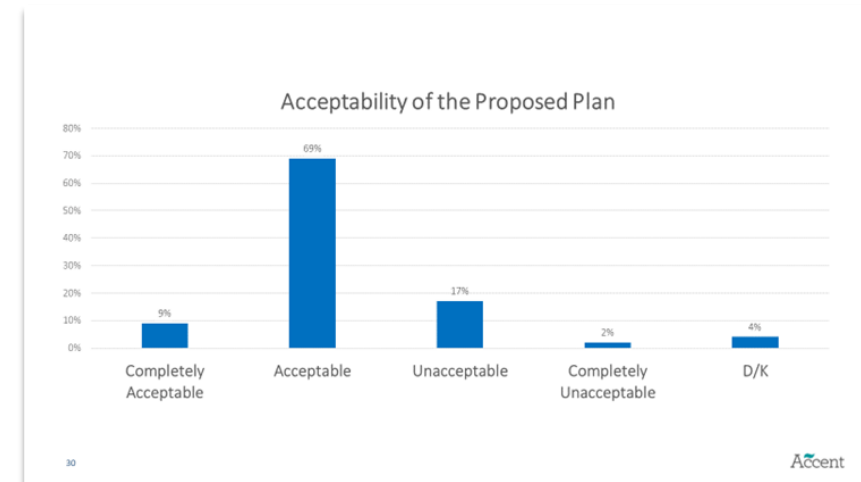
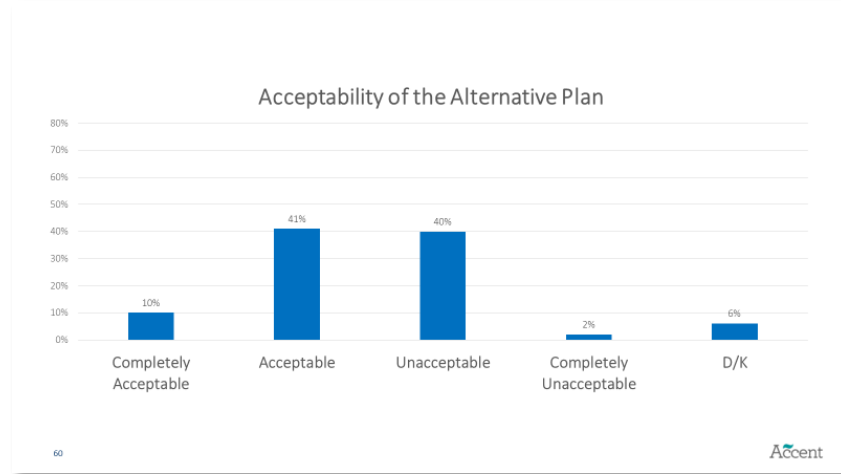


How: Investing in better monitoring of pipes and treatment plants that cause the most serious pollutions so that we get early warning and minimise impacts

Performance: Anglian has made good progress reducing overall pollutions, down by half in 10 years.

Alternative cf Proposed Plan – Acceptability:

Overall acceptability was considerably lower for the Alternative Plan compared to Proposed Plan



Top Five – Acceptability Reasons

- 1) Environmentally friendly
- 2) Plan will make big/good improvements
- 3=) Good for future generations
- 3=) Trust them
- 5) Focuses on the right things

Top Five – Unacceptability Reasons

- 1=) Water companies should pay more from profits
- 1=) Poor VFM/not doing enough
- 3) Too expensive
- 4) Doesn't focus on the right things
- 5=) Won't improve things/not environmentally friendly/no trust

Alternative Plan – Service Enhancements Changes:

Three main reasons that they reject the Alternative Plan

*AW know their business and are more knowledgeable about what's worked at a practical level
Boston, NHH*

Alternative Plan

Anglian Water's Alternative Plan is exactly the same as the Proposed Plan

However, under this Alternative Plan, Anglian Water would need to deliver this in specific ways that are mandated by the Environment Agency and other regulators

Anglian Water have some challenges and feel that they can deliver the same customers benefit in a more cost efficient and environmentally sensitive way as you have seen in the Proposed plan

Example 1 Bioresources

In this Alternative Plan, Anglian Water HAVE to invest in incinerators to remove the risk of surface water run-off into rivers

In the PROPOSED plan, Anglian Water propose to work with farmers to address this through better agricultural practices. Around 95% of treated sewage sludge nationally is used by agriculture each year, reducing their demand for artificial fertilisers, without this farmers would have to source an alternative product

Example 2 Chemicals Programme

In this Alternative Plan, Anglian Water HAVE to invest in 18 sites to remove chemicals like Cypermethrin that comes from sheep dip and flea collars. At these 18 locations, Anglian Water feel that the cost benefit doesn't stack up for the level of concentrations of chemicals they are seeing.

Anglian Water would prefer to invest to identify where the chemicals are coming from and address this at source rather than installing equipment onto the back end of these water recycling centres

Accent

*I trust AW – they do this all day long
Chelmsford, HH*

Favour Alternative Plan

- Environment Agency are a trusted, expert, independent organisation who will have researched best processes
- Anglian Water are a private company driven by profit/shareholder returns

Reject Alternative Plan

- More expensive - why choose a more expensive way of delivering the same customers/community/ environment benefits
- Less environmentally friendly - building incinerators has a carbon cost
- Trust Anglian Water - run the process/practices, what's best for customers, balance cost and environment

*This is madness – the Proposed plan seems more sensitive to the environment and costs less
Chelmsford, HH*

*It's Jessie Jay – it's not about the money. I would rather spend the extra £30 on improving the CSOs faster
Boston, HH*

*I feel a bit uncomfortable going against the Environment Agency even if it's £30 less
Hartlepool, HH*

*Because they are NFP it makes me think they are socially responsible and not a mean rotter and this doesn't reflect that
Tenby, HH*

*I think the EA are underfunded and I'm not sure they've done that good a job so far of keeping the rivers clean enough
Northampton, HH*

*Given that the Environment Agency is the 'custodian of the environment' I find it a bit awkward that Anglian Water want to do things differently
Hartlepool, NHH*

*Some of those mandated examples feel like they could waste money – like the chemicals. I'd like them to negotiate with the Environment Agency and come to an agreement
Hartlepool, NHH*

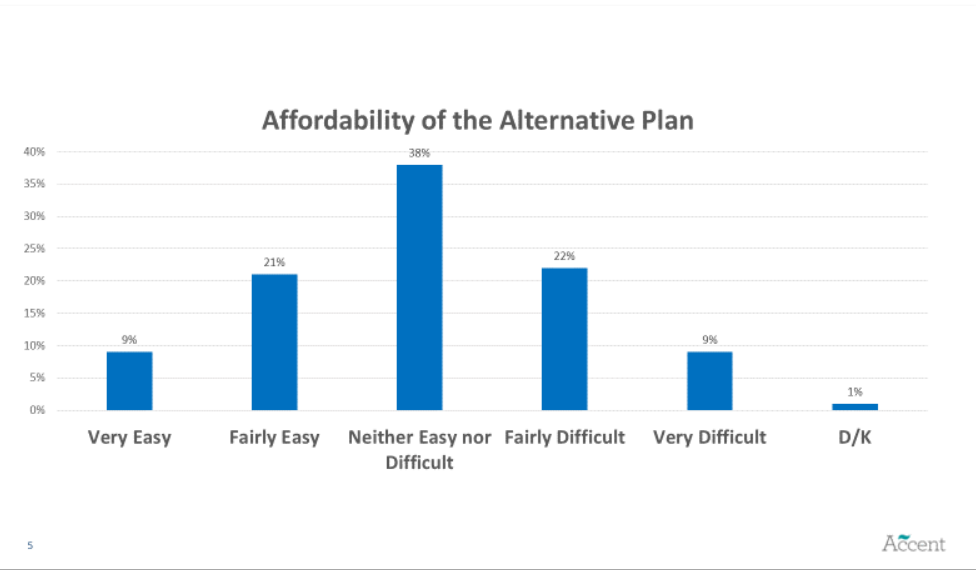
*I quite like the fact that Anglian Water are being proactive and challenging but what are the other water companies doing. I wouldn't want them to get fined
Chelmsford, HH*

*I think its right that Anglian Water choose how to deliver it and it sounds like they have schemes in place working with farmers etc
Chelmsford, HH*

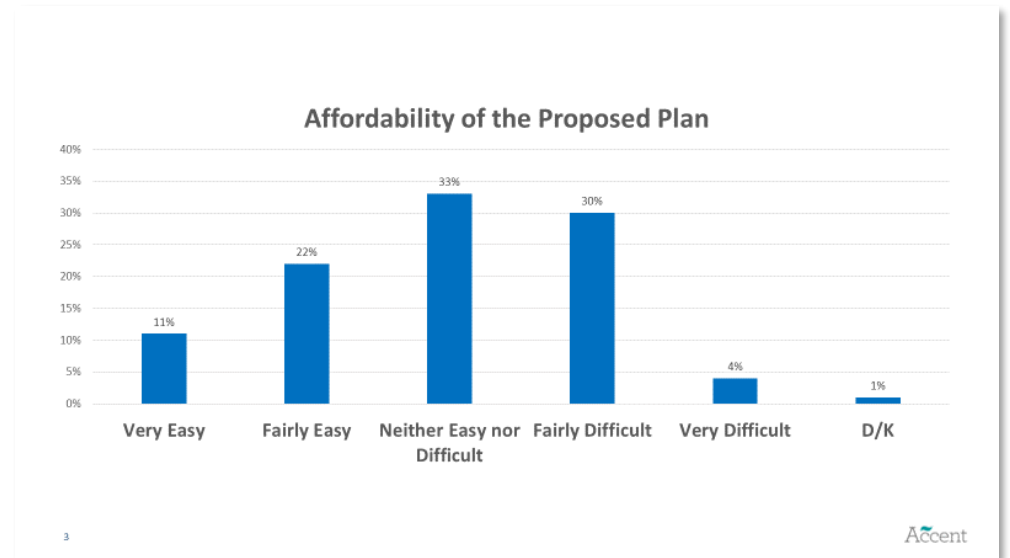
Alternative cf Proposed Plan – Affordability:

Alternative Plan is more expensive than the Proposed Plan but no sig difference in affordability scores

Qualitatively majority say spend the higher amount and use it to speed up other investment areas



Average HH bill increase of £447-£580 without inflation and £679 with inflation



Average HH bill increase of £447-£552 without inflation and £646 with inflation

Customers found this exercise a bit frustrating. £ differences between the two plans are so minimal. 71% favour increasing bills sooner, 14% favour shifting this to Future generations and 15% don't know enough to answer



Summary

Overall Preference between the Proposed and Alternative Plan: Majority prefer the Proposed Plan

Anglian Water Alternative Business Plan

1 Environmental ambition: £1,305m
Going further than the targets set to improve the environment.
(Proposed plan: £865m)

2 Combined Sewer Overflows: £1,073m
Work to gradually reduce the number of spills from storm overflows in line with the government target we have been given.
(Proposed plan: £450m)

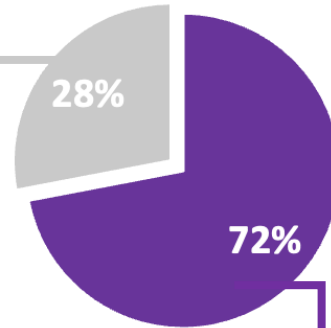
3 Climate resilience: £370m
Invest in renewing those assets we have identified as vulnerable to the effects of climate change.
(Proposed plan: £370m)

4 Net zero: £200m
Speed up plans to reduce carbon emissions, achieving the government target by 2030.
(Proposed plan: £200m)

5 Impact of growth: £202m
Increase how much waste water the system can safely recycle to accommodate 103,000 new homes by 2030.
(Proposed plan: £200m)

6 Balancing water supply and demand: £165m
Deliver a secure and wholesome supply of water to our customers, businesses and other sectors.
(Proposed plan: £165m)

Of the Business Plans you have seen, which do you prefer?



Anglian Water Proposed Business Plan

1 Environmental ambition: £865m
Going further than the targets set to improve the environment. We'll **achieve tighter standards** than ever before in the treated water we return to rivers and coastal areas, capturing more nutrients to protect rivers to deliver against the National target of an 80% reduction in nutrients released by 2037.

2 Combined Sewer Overflows: £450m
Work to gradually reduce the number of spills from storm overflows in line with the government target we have been given. We'll **improve 43%** of our high priority overflows (those with the most environmental impact) as part of a longer term programme to improve all of them. We will remove the 16% of our spills that cause the most harm. We will go beyond our 2025 'get river positive commitment' of reducing spills to **less than 20 per year per overflow on average**. By 2030 we will eliminate those spills that the Environment Agency have classed as preventing rivers from achieving good ecology.

3 Climate resilience: £370m
Invest in renewing those assets we have identified as vulnerable to the effects of climate change. We will protect communities that are supplied by pipes that are more vulnerable to climate change impacts, by **renewing** around 6,000km of pipes in a phased plan over the coming decades, starting with around **800km by 2030**.

4 Net zero: £200m
Speed up plans to reduce carbon emissions, achieving the government target by 2030. In this the climate critical decade our plan will reduce the amount of **carbon we emit from our own activities** in combination with offsetting to reach the zero emission target.

5 Impact of growth: £200m
Increase how much waste water the system can safely recycle to accommodate 103,000 new homes by 2030. As well as connecting these new homes to our networks, there is more used water going into the sewers than before due to increase in population and intense rainfall events. We will develop a programme of work to upgrade our sewer networks and treatment plants before they get overloaded, avoid disruption to existing customers and risk, to the environment.

6 Balancing water supply and demand: £165m
Deliver a secure and wholesome supply of water to our customers, businesses and other sectors. We will be installing a network of new regional transfers to move water around the region through **300km of new pipes, 1million smart meters**, a new 25 million litres per day new desalination plant in Norfolk.

Plans deliver the same customer benefits

Recommendation is that the Proposed Plan is taken forward to the quantitative work but key changes should be considered

Summary of Proposed Plan and Improvements

Acceptability is high with over 8 out of 10 feeling the plan was acceptable

Performance Commitments	
	2025-2030
Leakage	Acceptable but could be more ambitious
Supply Interruptions	Acceptable
Water Quality	Acceptable
Sewer Flooding in/Out	Less acceptable, more ambitious in the short term
Pollution in Rivers	Acceptable but could be more ambitious

Service Enhancements		
	2025-2030	Spend
Rivers/Waterways	Critical	Support high % spend
CSOs	Critical	Keen to go further
Renewing pipework due to climate change	Critical	Improve 800km/6000km
Net zero	Important	Support spend
Upgrading sewers due to housing growth	Critical	Keen to go further than 103,000 properties
Water supply and demand	Critical	Support spend

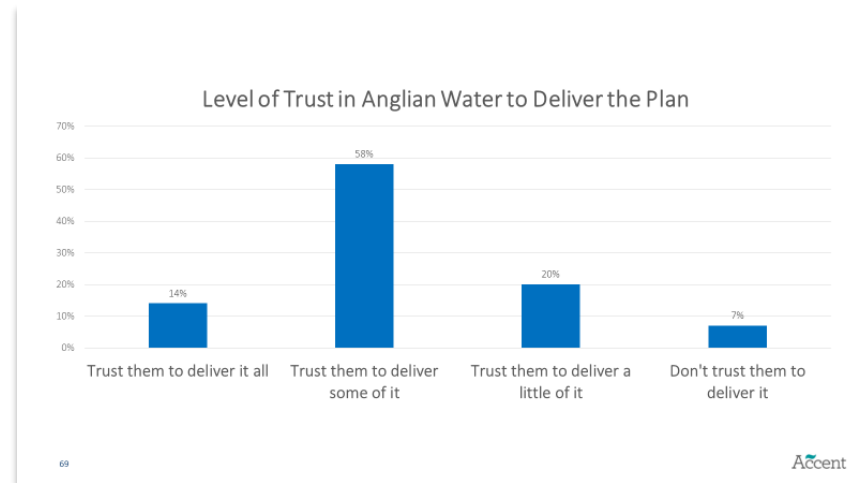
Affordability of the Proposed plan is the same as baseline affordability of the current water bill

Some suggestion that same affordability levels for the higher cost of the Alternative Plan could be an indication to use that investment to go harder and faster with targets/investments

Potential in the quantitative work to tighten some of the language to avoid comprehension issues and strengthen acceptability

Trust in Anglian Water to Deliver:

Almost three quarters trust Anglian Water to deliver all/some of the plan



Why do you trust them?

- 1) I get a good service
- 2) Services are good VFM
- 3) They keep their service promises
- 4) Customers are top priority

Why don't you trust them?

- 1) They don't update customers
- 2) Shareholders are more important than customers
- 3) They will want to put bills up more
- 4) Services are poor VFM

Next Steps

1

Share debrief with wider team

2

Discuss with CCG

3

Discuss Proposed Plan improvements/changes and update infographic

- Improvements in PCs for leakage, sewer flooding inside/outside, pollution in rivers
- Consider increasing investment in CSOs, pipework investment and sewer upgrades
- Language and presentation issues as per 'bottom boxes on key slides'
- More information on wider environment 'net zero' service enhancement

4

Discuss including more contextual information to increase customer ability to respond with fuller information

- More Performance Commitments, CSR, Policies that support CIVS

Thank you

Accent conforms to the requirements of ISO20252:2012

Full details of research design and methodology are available upon request.

Accent



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