Anglian Water Customer Engagement

Synthesis Report

A rolling synthesis of customer and stakeholder insight, research and engagement, to inform forward planning

Faldrax Consulting Ltd, June Edition

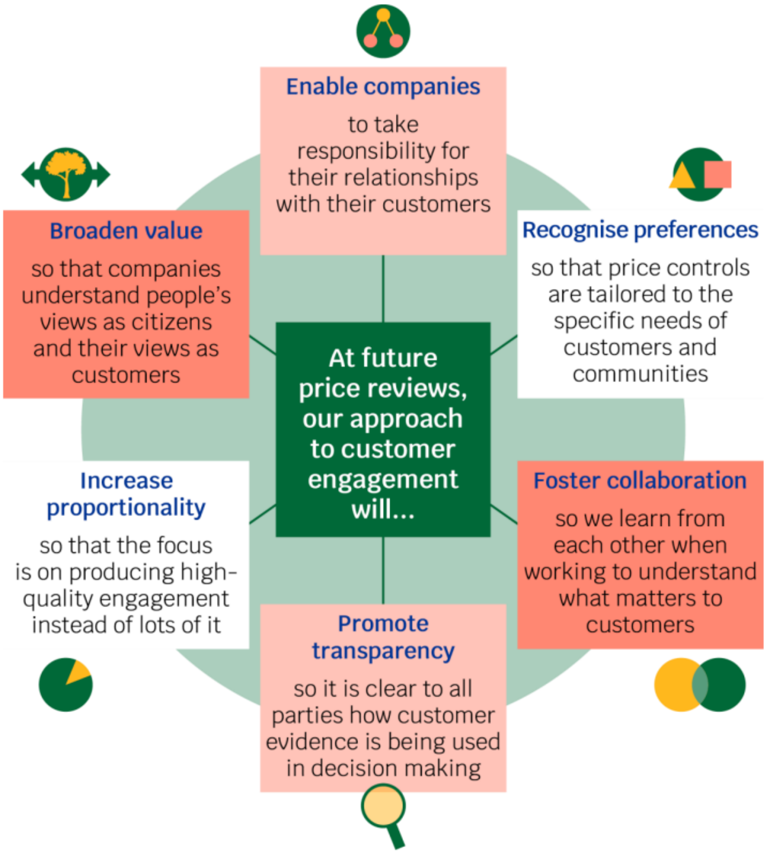
Contents

Background

Since the 2014 price review (PR14), Ofwat (the economic regulator of the water sector in England and Wales) has focused on its increased ambition to ensure customers are at the heart of water companies' decision making. This ambition has remained in place for the next price review in 2024 (PR24), and Ofwat's key priorities include:

- Wanting a transformation in water companies’ performance (so that customers and communities have more confidence that companies are responding to their needs)
- Wanting companies to do more to meet the long-term challenges ahead (to ensure that action is taken to deliver for future generations as well as current ones)
- Expecting companies to provide greater public value (as people increasingly expect companies in all sectors to behave ethically and to consider their broader impacts)

Customer engagement is a key area of focus across all these priorities and Ofwat have set out a direction of travel for the industry in terms of the goals for how customer evidence might be used to inform future price reviews, summarised below:



At future price reviews, our approach to customer engagement will...

Enable companies to take responsibility for their relationships with their customers

Recognise preferences so that price controls are tailored to the specific needs of customers and communities

Foster collaboration so we learn from each other when working to understand what matters to customers

Promote transparency so it is clear to all parties how customer evidence is being used in decision making

Increase proportionality so that the focus is on producing high-quality engagement instead of lots of it

Broaden value so that companies understand people’s views as citizens and their views as customers

Anglian Water was already a leader in this space, having had recognition at PR19 for the quality of its customer engagement and insight. The wider industry goals are already leading to collaboration and joint research across the water companies and regions and you will see the results of that work contained within this report. In addition, several collaborative pieces of research involving Ofwat and the Consumer Council for Water (CCW) are in progress. There is also a shift from quantity to quality of engagement as well as an ambition to open up the conversation to explore the views of citizens and Anglian Water has put itself at the centre of these changes by leading a monthly company forum to share best practice and findings while also directly collaborating with others on a number of specific customer engagement projects.

A history of quality engagement

Anglian Water set a precedent for good quality, robust customer engagment to support the preparation of its business plans. In 2014, the Office of Public Management (OPM) produced its first synthesis report, which brought together a large programme of customer and stakeholder research and engagement. This explored the views of household, business, and future customers, as well as important partners and regional stakeholders.

This was followed by a series of reports which provided a rolling synthesis of the new sources of evidence produced by an independent consultant ([redacted]). This synthesis led to a **final report**, produced to support the PR19 business plan. It was well-received by the Customer Engagement Forum (CEF) and other interested stakeholders.

Ofwat has set out its minimum standards for **high quality research**:

How customer insight informs business decisions

Anglian Water have developed a customer research and engagement strategy to provide a clear step-by-step guide on how to evidence the golden thread between research and decisions. This starts with mapping the decisions that customers can influence and setting out the key principles for engagement to ensure that each piece of insight is impactful and meaningful.

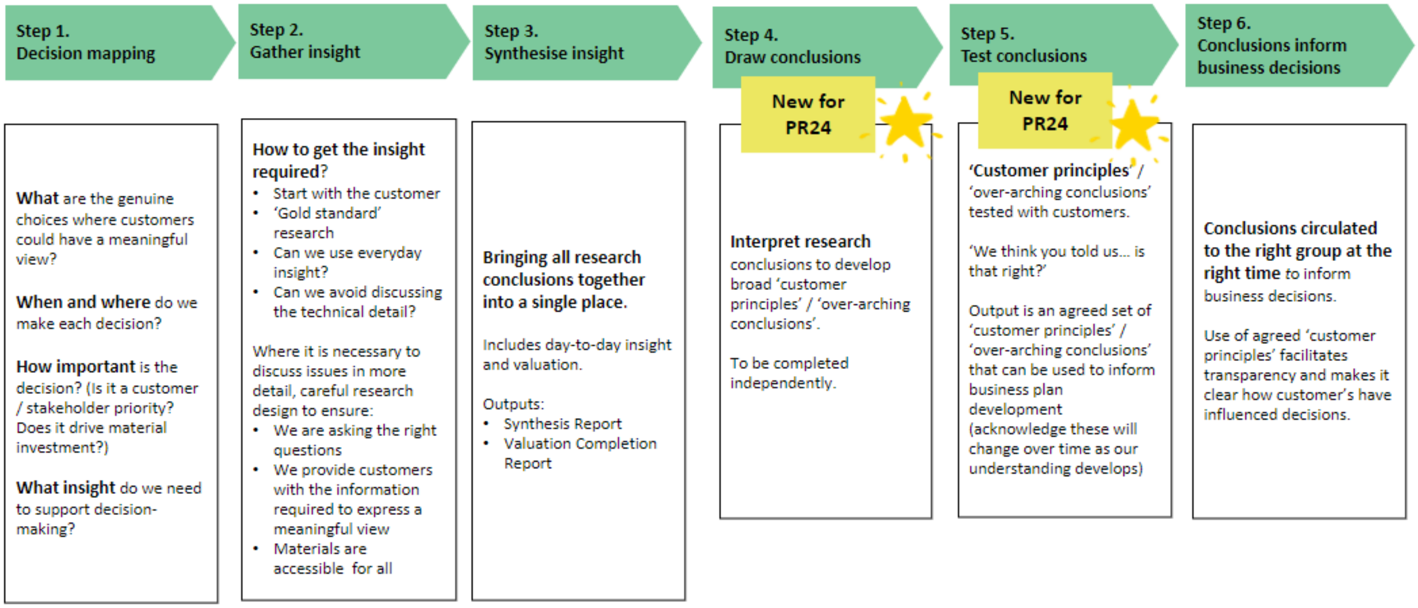
These engagement principles are:

- All Anglian Water research starts with the customer and what matters to them and their world
- The design and programming of customer engagement research is targeted to support business decision-making
- Research is meaningful and generates robust conclusions
- Anglian Water make the most of everyday interactions
- The programme of customer engagement for PR24 is proportionate and efficient

These engagement principles will be tested in line with the 'approach to synthesis' as set out below.

This synthesis report is a key step in bringing research conclusions together in one place, interpreting them in an independent way to form overarching conclusions which can be sense checked back with customers. This approach of adopting independent conclusions which are tested with customers, builds on the sector-leading approach to engagement at PR19.

The following diagram sets out the steps of how Anglian Water will apply this approach in practice:



Step 1.
Decision mapping

What are the genuine choices where customers could have a meaningful view?

When and where do we make each decision?

How important is the decision? (Is it a customer / stakeholder priority? Does it drive material investment?)

What insight do we need to support decision-making?

Step 2.
Gather insight

How to get the insight required?

- Start with the customer
- 'Gold standard' research
- Can we use everyday insight?
- Can we avoid discussing the technical detail?

Where it is necessary to discuss issues in more detail, careful research design to ensure:

- We are asking the right questions
- We provide customers with the information required to express a meaningful view
- Materials are accessible for all

Step 3.
Synthesise insight

Bringing all research conclusions together into a single place.

Includes day-to-day insight and valuation.

Outputs:

- Synthesis Report
- Valuation Completion Report

Step 4.
Draw conclusions

New for PR24

Interpret research conclusions to develop broad 'customer principles' / 'over-arching conclusions'.

To be completed independently.

Step 5.
Test conclusions

New for PR24

'Customer principles' / 'over-arching conclusions' tested with customers.

'We think you told us… is that right?'

Output is an agreed set of 'customer principles' / 'over-arching conclusions' that can be used to inform business plan development (acknowledge these will change over time as our understanding develops)

Step 6.
Conclusions inform business decisions

Conclusions circulated to the right group at the right time *to* inform business decisions.

Use of agreed 'customer principles' facilitates transparency and makes it clear how customer's have influenced decisions.

Stakeholder insight

In addition to customer insight the report is supplemented with stakeholder feedback to demonstrate how stakeholder preferences have informed Anglian Waters ambition and strategy and show:

- Where there may be gaps in customer insight
- How stakeholder views inform decision making
- A holistic overview of insight, understanding how views differ between customers and stakeholders

About this report

This report will be updated on a quarterly basis, reflecting new findings. It is in a tabular format, to enable easy updates, and displays different levels of customer insight on key issues, with the ability to dig deeper and discover more detail if required, through links provided to the original source reports. It also analyses the quality of each piece of new evidence – scoring the methodology, collection, and interpretation of each source, along with the contribution and depth of the activity in relation to the area it is informing.

The key audience for this report are the business planning leads within Anglian Water, responsible for developing elements of the business plan and playing a key role in achieving Anglian Waters PR24 objective of making 'Better Decisions'.

In addition to this report, '***Customer Principles***' is a higher-level summary, that explicitly links insight to business decisions by providing a concise over-arching digestible synopsis of the key triangulated findings to help inform Anglian Water decision makers.

We have broken down these strategic ambitions into outcome sub-strategies and then topics that customers relate to and engage upon; Anglian Water can then use this to make business decisions. The document will follow the structure set out below:

High level ambitions	Strategies	Topics
Responsible business	Net zero	Net zero
	Affordability	Affordability & social tariff
		Community support – priority services
		Community support - CSR
Delighted customers	Customer strategy	Education
		Working with retailers and developers
		Asset health
Sate, clean and reliable water	Water Resources Management Plan (WRMP)	Water resources - supply
		Water resources – demand management

		Water resources - leakage
	Water quality	Water quality
	Disruption	Disruption – supply interruptions
		Disruption – low pressure
A flourishing environment	Drainage Water Management Plan (DWMP)	DWMP – flooding and blockages
		DWMP – CSO's & pollutions
	Water Industry Natural Environment Programme (WINEP)	WINEP – sustainable abstractions
		WINEP – Wider environmental impact
	Bioresources	Bioresources

Approach to synthesis

Step one

Each individual research report has been reviewed in full to understand the:

- Supplier
- Method
- Purpose
- Sample Size
- Segments

Step two

The reports have been scored using a framework derived from the **CCW triangulation approach** and developed initially by the synthesis team. This framework was tested with both the wider Anglian Water team and the ICG with the version below reflecting their feedback. All criteria need to be met to obtain the score.

Score	Validity of Methodology	Sample/ Collection of Data	Report Interpretation	Depth	Relevance
1	Unplanned – gathered as part of wider engagement activity	Recording of feedback not rigorous. Sample size small/ not proportionate Not representative	Lack of credible interpretation/ potential bias/ no discussion of conclusions	High level – brand awareness	High level feedback – tangential to topic Or research conducted more than 5 years ago
2	Limited due to method, sample size or activity	Limited depth of feedback due to length of	Good links in report to discussions	Two-way conversation /	Provides limited insight - moderately useful

		engagement /options explored Proportionate sample size for method but limited representation		detail on specific questions	Research conducted within last 5 years
3	Clear aims, solid methodology, barriers to inclusion considered	Range of perspectives gathered /extensive detail /methods for recording data clear Proportionate sample for method Full representation of hard to reach, NHH etc	Clear narrative of all points discussed / robust analysis/ clear articulation of differing views and conclusions reached	Explores detailed trade-offs or in-depth discussions on specific topic	Clear link to topic – high value insight. Insight gathered within last 3 years

Summation of scores

The summation of scores gives an overall indication regarding the validity and reliability of the insight and the ‘weight’ that can be applied to it when comparing with other insight. It should be noted that in summarising in this way one can lose some of the detail regarding each piece of insight, but the aim of the scoring is to help the overall synthesis process.

As a high-level guide, each piece of insight will be given a RAG status to help interpretations and will be based on the following summary scores.

Score	**RAG Status**
5 – 9	*Pale green – less reliable but can help to validate other findings*
10-11	*Mid green - reliable but some gaps in robustness*
12-15	*Dark green – very reliable and robust*

Using this scoring approach helps reduce the risk of bias, evidencing sources based on the methodology employed. The categorisation is designed to help the author and the reader make judgements about the weight to be given to each source of evidence.

Step three

The sources were reviewed for a second time, and relevant sections of text were extracted and summarised into the grids provided in the subsequent sections of this report, using the Anglian Water strategies. It is worth noting that a sole source can provide insight for several of the outcome areas; summary text has been extracted and displayed in the table as appropriate.

For each topic area, a set of key questions has been explored; these have also been used as the basis of the summary report 'Customer Principles'.'

Key questions:

What do the majority of insights suggest?

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Are there any insights which contradict the above?

What do our stakeholders think?

We have indicated if the customer views on this area remain similar to PR19 or whether the strength of concern in this area has increased or decreased compared to PR19 by using the following key:

⇄	📈	📉
Views similar to PR19	Concern increased	Concern decreased

Please note that Faldrax Consulting Ltd has not conducted any independent verification of the quality and content of the research reviewed to inform this report. It has therefore been prepared on the assumption that research teams, as experts in their fields, have followed best practice principles in designing and conducting their research and reported findings accurately. We have drawn upon some of the key messages in the Anglian Water PR19 report and displayed them in the table for direct reference.

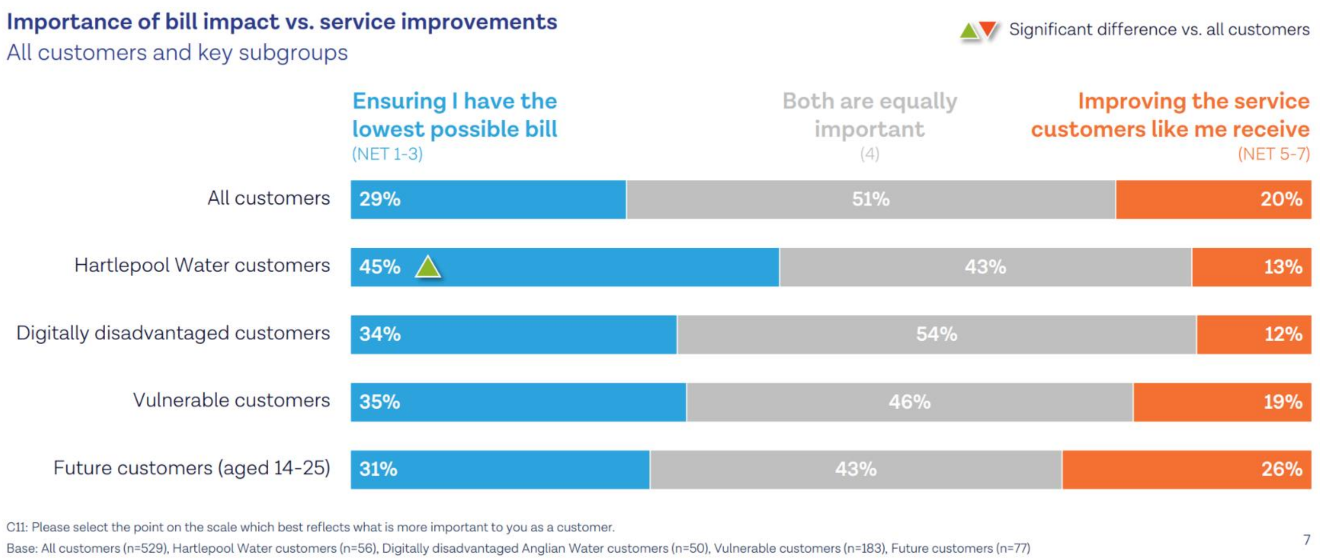
Key differences between customer segments

The research conducted to support the PR24 business plan has looked to cover a wide range of Anglian Water customers – using representative samples to cover both geographical and socio-economic segments. Where research or insight has not met this breath of segmentation it has been weighted less favourably but is still important to include as it provides context and a point of triangulation. Full details are provided in the Customer Engagement Segmentation Strategy (Version 3: Updated January 23).

Geographical differences

The majority of the area Anglian Water supplies is in the east of England, but the Hartlepool Water area is distinctly separated so it is important to see if there are any key differences in customers' views. From the insight gathered, there is very little difference seen in relation to the views of the Hartlepool area in comparison to the rest of Anglian Water customers – with most differences being more related to socio-economic reasons than geographical ones. From PR19 the conclusion was that Hartlepool Water customers were particularly satisfied with value for money and caring about the communities seemed increasingly important to customers in this geographical area.

From PR24 insight, the key difference is Hartlepool Water customers are keener on keeping their bills lower, even compared to those in vulnerable circumstances across the rest of the region.[38]



C11: Please select the point on the scale which best reflects what is more important to you as a customer.
Base: All customers (n=529), Hartlepool Water customers (n=56), Digitally disadvantaged Anglian Water customers (n=50), Vulnerable customers (n=183), Future customers (n=77)

Customer Engagement Investment Priorities (Phase 2) [38]

Future customers

Most insight is gathered from 'bill payers' because they are more easily identified and have a direct connection with the service they receive, and the bill impacts associated with them. However, understanding future customers' perspectives has become increasingly important, especially considering the more strategic long-term investments needed to provide secure supplies of water for the future and to protect the environment in the long-term. Research has been pragmatic, so that if the issue being explored has that longer-term lens, future customers have been included even though they are currently not paying bills. There have been a few differences highlighted in the insight where future customers' views differ from the wider customer base:

- Future customers ranked reducing carbon footprint more highly and leakage less high compared to those who were aged 45 plus
- Future customers ranked reducing carbon footprint as the second PR24 priority for investment, compared to customers more widely, who ranked it 13th
- Future customers ranked metering higher than lead replacement as a priority – a contrast with the wider customer base
- Interestingly, future customers seem less concerned about the pace of achieving environmental targets with regard to abstraction reduction, with only 21% feeling they should be delivered sooner, compared to 42% of the wider group

Customers in vulnerable circumstances

Unsurprisingly, those customers in vulnerable circumstances have a generally higher priority for the services specific to them such as PSR and affordability support, but their views around the wider benefits are very consistent with the majority of customers. Disabled customers highlighted more bespoke communications to assist with their needs regarding water interruptions and supply issues.

Individuals with lower socioeconomic status, and those who are medically vulnerable, assigned significantly greater levels of hardship to their households when it came to affording the proposed water and sewerage bills.

Retailers/business customers

There is, again, much similarity in the results seen from business customers and retailers compared with the wider customer base, but a few areas where specific differences are noted are:

- We see a significant difference in the overall acceptability of the business plan, with 84% of business customers finding the plan acceptable compared to 69% of domestic customers. This is also reflected in the affordability of the plan with 30% of business customers finding it affordable compared to 19% of domestic customers.
- There are indications that some business customers believe water is (too) cheap and under-valued
- Retailers want to see an improved customer service for their customers in terms of timeliness and quality of response. They are generally concerned about the current metering arrangements as the data that is generated is poor quality and inconsistent across different wholesalers. They show a strong support to smart metering and see this as a major enabler of water efficiency
- Anglian Water were ranked 9th best company in a survey conducted by MOSL, with the escalations/complaints process and communication cited as key areas for improvement
- Businesses spread their preferences across a range of options when thinking about water resources for the future, and are more likely to pick transferring water and smart metering
- For businesses, the focus is always on cost; they are interested in recycling their water and want water companies to prioritise this

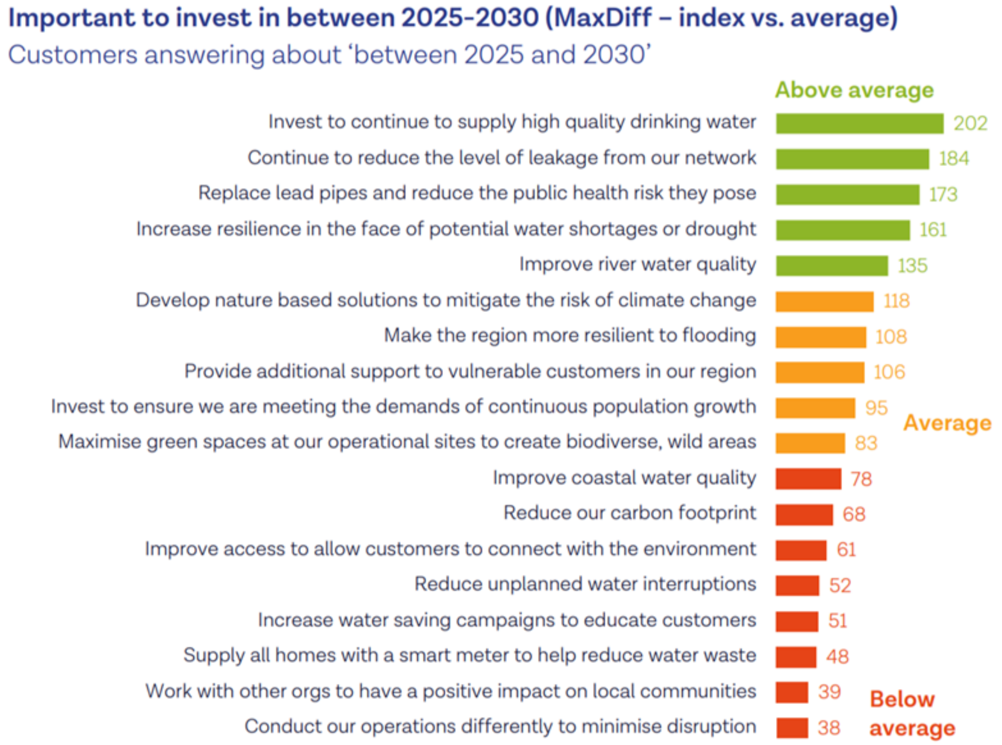
Balancing the plans

1.Customers' priorities - service

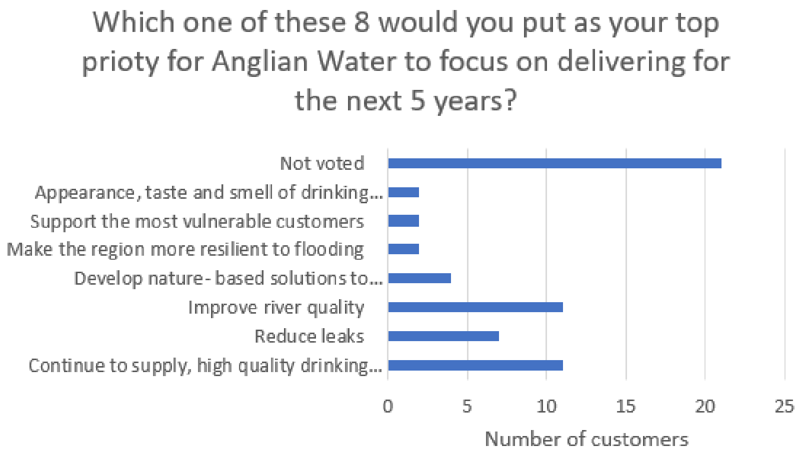
What are the most important services Anglian Water provides?

New Insights	Source	Score
Continuing to supply high quality drinking water was the most important priority by far now and in the future with all customers	19	15
Leakage was seen as the second priority and despite the high cost replacing lead pipes was seen as much a priority as leakage	19	15
Improving river water quality also featured well above average in the prioritisation exercise	19	15
Increased resilience to drought is important in the absence of cost – but the high cost of addressing is a barrier for customers	19	15
Nature-based solutions, increase in the resilience to flooding, and additional support for vulnerable customers all rank highly, with little difference in priorities between short-term and long-term	19	15
In this nationally conducted research, areas such as water supply interruptions, appearance of water and flooding were all seen as high priorities, along with speed of response when things go wrong. Areas such as leakage, pollution, biodiversity, and affordability were given a medium priority, while carbon, drought (including reducing TUBs and NEUBs), bathing water quality and customer satisfaction were seen as less important	11	12
When rating the importance of Anglian Water's activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable	22	10
When asked about their priorities customers ranked as the top three: 38%: Continue to reduce the levels of leakage from our network, 28%: Invest to continue to supply high quality drinking water, 26%: Improve river water quality	32	6
Customers identified their areas of primary concern; Public water leaks (26), Safe and secure water supplies (15), Sewage disposal (20)	33	8
From the community ambassador events the majority of participants ranked **safe, clean water as their top priority** with flourishing environment being their second priority	35	6
Customers currently believe that it's corporations or business leaders that make the decisions. They don't feel that their own thoughts or opinions would make a difference and impact Anglian Water's business plan. Customers would need to see/hear about the tangible actions taken as a result of their feedback to know that customer consultations are not done in vain.	42	6
The majority of customers place the most importance on areas that have a direct impact on their lives, such as water supply and quality. Customers feel these areas should be prioritised when it comes to the short/medium term future for Anglian Water to address and by feeding back on these topics it's more likely to leverage community spirit and boost engagement.	42	6
Many customers feel lacking in their water saving knowledge and support and are open to receiving this from Anglian Water. Educating customers on ways they can	33	8

reduce their own usage, as well as giving them the ability to track their own usage through the installation of smart meters, is considered an important step to customers in the preservation of water supplies.		
When it comes to environmental concerns, the availability of water supplies is of utmost importance to customers. Customers want to see action taken to protect available resources, including reducing water wastage through reducing leaks, eliminating pollution of water sources and educating the public on water saving methods. In addition, customers would like to see an increase of water storage capacity (i.e. reservoirs) to help in times of low rainfall.	33	8
Clean running water supply, alongside ensuring that water supply is always reliable and enough to meet demand, are the two main services customers spontaneously mention should be a priority for Anglian Water to benefit them and the wider society. Customers also want to see Anglian Water prioritising asset and leak maintenance. This is driven by a general level of knowledge that good asset and pipe health results in a reliable and quality water supply. In the current economic climate, many customers want to see Anglian Water doing everything possible to provide financial support to your customers, with some mentioning that this could be done via reducing staff bonuses or dividends. Alternatively, customers would like to see more support given to the vulnerable customers, who might be struggling financially, particularly families, via use of the priority services register, for example. Some also mentioned that they would like to see more of a focus on protecting the environment by maintaining water ways and looking after rivers, reservoirs, and beaches for both customers and the environment as well as reducing pollution and sewage leaks. This will in turn create a healthier and nicer environment to be in for all users. When prompted with a limited list of priorities, results mirrored customers' spontaneous thoughts above: high quality, reliable and safe water supply is the most essential, non-negotiable, service that Anglian Water should be offering to all customers. This is followed closely by maintenance, efficient sewage treatment, and the reduction of bills and fair prices. Although education/sharing communication is important, it’s viewed as secondary to the actual services that Anglian Water provide (e.g. clean and constant water) and is perceived to be an initiative that should be running in the background on a constant basis rather than put at the forefront.	58	9
Customers feel that it's most important that Anglian Water address the challenge of future planning for the next generations, particularly with the increasing population, through asset maintenance and building resilience against external threats. There is a strong perception that poor asset maintenance will have a direct impact on water supply and quality, so customers want to see Anglian Water working hard to avoid this.	58	9

However, the remaining challenges are still viewed as important, and each come with their own set of difficulties and were ranked very closely, for example customers are very concerned around climate change at the moment since it's been very prevalent in the news recently, particularly as we're seeing more extreme weather conditions when it comes to floods and droughts. Additionally, due to the cost-of-living crisis at the moment, affordability is viewed to be a large concern and something that's more of an important challenge now compared to the past few years. The environment is always front of mind for customers and population growth has been a rising concern. The only notable difference in the rankings is from markets and finance which are by far the least important to customers as they are challenges customers cannot control or have a say in. Generally, customers feel that the list covers the main challenges that Anglian Water could face. However, some feel that the list does not account for challenges in innovation. They feel that there is a need for Anglian Water to address this as more of a priority, showing that they are working to develop new water saving devices and using the latest technology to manage flood and drought resilience.		
When ranking 'Resilience to flooding and drought' was highest priority for customers followed by 'Enhancement of the natural environment, biodiversity and habitats', Achieving net zero and lastly 'Improving access to the natural environment'	63	9
Across the ambassador event talks of the 320 customers who attended 30% thought 'safe, clean water', was highest priority followed by 15% who prioritised 'flourishing environment' and 11% who prioritised 'resilience'.	66	6
	38	15
High quality drinking water remains very important to customers; Anglian Water should prioritise this in its business plan. And whilst both are important, the safety of drinking water is much more important to customers than its cosmetic appearance.	93	14

Long-term planning to secure water supplies for the future and improving river water quality are moderately and consistently important to customers. Replacing pipes, transporting and treating sewage sludge, reducing greenhouse gas emissions, and especially, planning for growth, are less important to customers, and Anglian Water may consider de-prioritising these areas in its business plan.		
Including the latest March wave from this ongoing survey, the average CSAT score for the January to March period is slightly lower than in the previous periods. Satisfied customers most often stated that AW do well because they provide good customer service or that they have not experienced any issues.	94	10
When testing the customer principles they scored on a scale of 1-10 (with 10 being highest agreement) 1. Continue to supply us with safe, high quality drinking water (9.8) 2. Reduce leaks - we find it wasteful (9.0) 3. Improve river water quality (8.2) 4. Make the region more resilient to flooding (7.9) 5. Appearance, taste, and smell of drinking water (7.9) 6. We are worried about drought resilience (7.8) 7. Develop nature-based solutions to mitigate climate change (7.5) 8. Support the most vulnerable customers (7) Overall, the customer principles listed above are considered the most important services for Anglian Water to provide and many customers don't have anything to add.	101	9
Additional priorities could include: 1. Reducing or eliminating sewage discharge - this is a hot topic that customers feel needs to be addressed 2. Communicating with and educating customers on how to save water 3. Improving infrastructures in general to tackle modern day issues 4. Investing in new technologies and solutions (e.g. smart pipe work, desalination)	101	9
When shown the draft AW business plan, 85% said it was in line with customer priorities: most customers feel the proposed plan covers important and achievable targets that Anglian Water need to tackle asap. They are particularly happy to see investment in protecting water supply and the environment, especially in relation to less sewage pollution. However, some would prefer to see a higher reduction in sewer overflows.	101	9
When exploring cost of the proposed AW business plan, 56% opted for Option 1: Deliver the benefits as set out in a more cost efficient and environmentally sensitive way, with an increase in customer bills of up to £37.50 (7%) per year from 2025 onwards.	101	9
While the majority of customers understand the potential performance commitment of digital engagement, the definition could be made clearer through simplifying the language and providing examples of the digital channels that will be improved. Providing more detail on the ways this will benefit customers by making communication easier, more accurate and more accessible, and explaining the ways it will help target customers in vulnerable situations would improve understanding and appeal of the commitment.	115	10

Although customers acknowledge the potential benefits of implementing Direct Procurement, such as improved asset maintenance and readiness for climate change, they express a strong desire for transparency and reassurance that the quality of service will not be compromised. To address these concerns, it is crucial for any subcontractors to undergo thorough vetting, considering factors beyond just costs. Furthermore, the final decision should be made public, ensuring that customers are fully informed about the entities responsible for carrying out the work. By establishing such measures, trust can be fostered among its customers and worries alleviated regarding the outsourcing of services.	115	10
When exploring whether AW should have a bespoke PC regarding discolouration - the majority of customers haven't ever experienced discolouration or a change to the taste/smell of water (65%).	115	10
From the community events, customers priorities for PR24 were: 	128	6
Customers from the community events thought that the PR24 plans were missing: - Leakage - not good at investigating leaks - no chlorine in the water - Reduce the number of storm overflows especially in dry weather - Waste overflow - Wastewater controls - Encourage water saving ideas - water butts - Costs to do all improvements	128	6
Final affordability and acceptability testing gave an overall figure of 73% (69% HH and 84% NHH) who found the business plan acceptable and 16% found it unacceptable.	134	14
Reducing leakage is the most important of the water performance commitments shown and reducing pollution incidents is the most important of the wastewater performance commitments.	134	14
Managing droughts and ensuring sufficient water for all is the most important of the water enhancements shown to customers and reducing spills is the most important of the wastewater enhancements, closely followed by environmental ambition.	134	14

PR19 Key Messages (drawn from the AW PR19 report)

From the work conducted to support the development of the Strategic Direction Statement and PR19, customers ranked the importance of the high-level outcomes as below:

1 – Safe, clean water (97%)
2 – Supply meets demand (93%)
3 – Fair charges – fair returns (92%)
4 – Satisfied/delighted customers (91%)
5 – Resilient service (86%)
6 – Flourishing environment (83%)
7 – Investing for tomorrow (82%)
8 - Caring for communities/positive impact on communities (81%
9 – A smaller footprint (74%)

In contrast, the PR19 Acceptability Testing looked at the percentage of customers that found areas of high importance and found flooding and pollution incidents featuring as more highly prioritised:
Sewer collapses - 87%
Pollution incidents - 86%
Internal sewer flooding - 83%
Mains repairs - 82%
Supporting customers in vulnerable circumstances (PSR reach) - 79%
Leakage - 68%
External sewer flooding - 68%
C-MeX - 66%
Reactive mains bursts - 65%
Treatment works compliance- 57%

The two studies approached prioritisation differently; the first explored at a high (outcomes level) while the second was more detailed and directly related to service failures that could impact the customer – this may be the reason we see a difference in scoring.

What do the majority of insights suggest?

Across all the engagement conducted, it is clear that providing high quality drinking water is customers' top priority. In the more recent studies, we have seen support for lead pipe replacement which also aligns with the high-water quality narrative (note however, under investment, this priority drops). Repairing leaks is also a clear priority and even though it varies in relative position throughout the research it is generally appearing in the top half of customers' priorities, as does river water quality. The priority of drought resilience varies in the different insights but generally appears in the top third – it could be increasing in importance for customers driven by a greater social awareness of issues but there are indications that cost could be a barrier to customers' support. Flooding, pollution and environmental improvement are 'hot topics' for customers and stakeholders, and supporting vulnerable customers all appear to have a good level of support and focus from customers, but generally fall in the bottom half of a priority list. Helping customers understand more about water and their water use is a theme that also appears. When testing the draft business plan customers think AW have got it about right (85%) in terms of priorities, and final acceptability testing showed 73% acceptability for the company's plans. When exploring further bespoke performance commitments there was little support for an aesthetics commitment, while digital engagement and direct procurement had some support, clarity on what would be achieved and its measurement were key for customers.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Those customers in vulnerable circumstances have a generally higher priority for the services specific to them such as PSR and affordability support but their views don't differ around the wider benefits.

Are there any insights which contradict the above?

There were some differences noted in the more recent research with women ranking 'providing nature-based solutions' much higher than men (third in ranking for women compared to below average for men). Future customers ranked reducing carbon footprint more highly and leakage less highly, compared to those who were aged 45 plus. We also see non-household customers with higher acceptance rates of the overall plan (84%) compared to the household customers (69%) in the final acceptability testing.

What do our stakeholders think?

CCW in their 2021 'Water Matters report cite four key areas of focus:

- End Water Poverty – and discuss working with companies to introduce a single water affordability scheme.
- End Sewer Flooding Misery – asking companies to commit to immediate, short-term and long-term action to improve their sewer flooding responses.
- Don't Let People Suffer in Silence - identifying the barriers that prevent people from making complaints about service issues such as low pressure and supply interruptions.
- People and the environment - they discuss how the environment is an issue that many people can relate to, but they struggle to understand water companies' roles and the impact of their own behaviour.

March 2023 – significant external engagement regarding storm overflows – press coverage, stakeholder concern regarding overflow use and pollution of both rivers and sea.

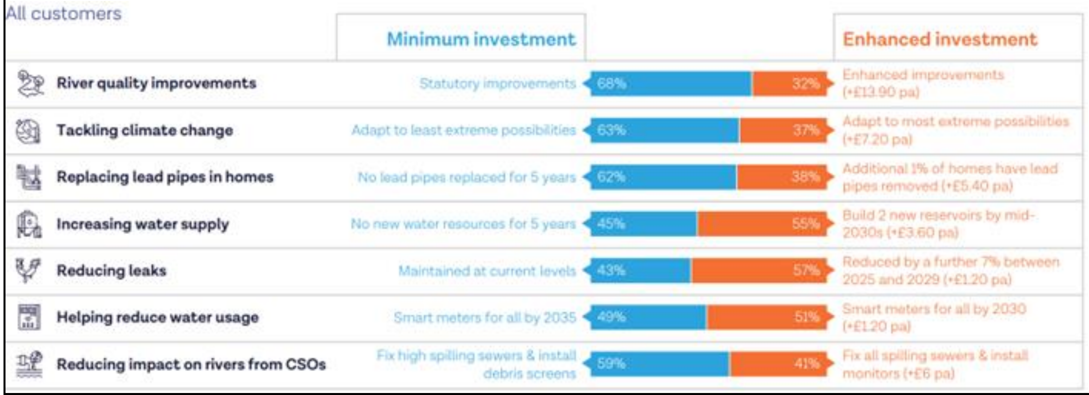
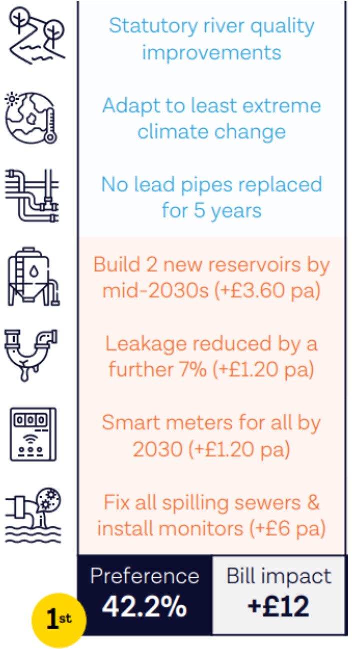
Overall, stakeholder views are aligned with the priorities of customers (as you would expect, given many of our stakeholders are politicians and therefore driven by the views of the electorate). The main difference tends to be that stakeholders focus more on the bigger, more strategic issues and don't tend to raise issues around day-to-day service, unless they are prompted to by customers contacting them.

2.Customers' priorities – investment

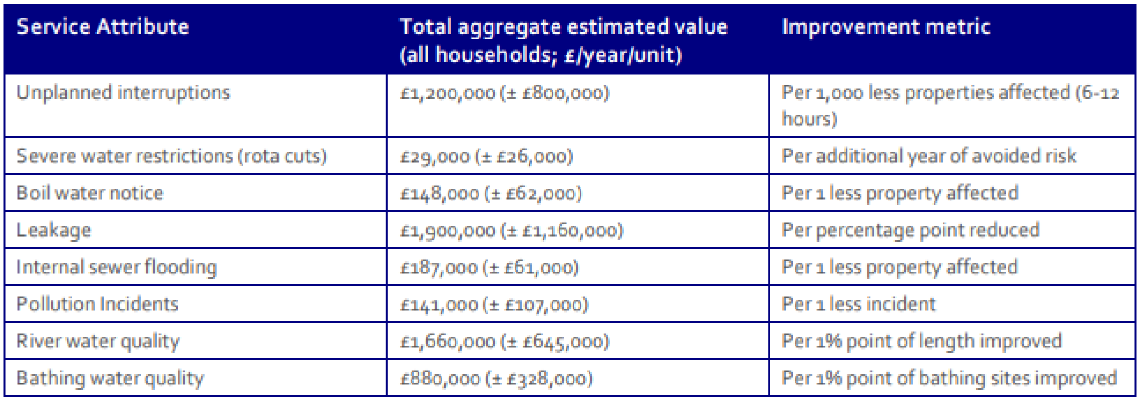
When thinking about cost, where do customers want Anglian Water to invest more?

New Insights	**Source**	**Score**
Continuing to supply high quality drinking water was the most important priority by far now and in the future with all customers	19	15
Leakage was seen as the second priority and despite the high cost replacing lead pipes was seen as much a priority as leakage	19	15
Improving river water quality also featured well above average in the prioritisation exercise	19	15
Increased resilience to drought is important in the absence of cost – but the high cost of addressing is a barrier for customers	19	15
Nature based solutions, increase in the resilience to flooding and additional support for vulnerable customers all rank highly with little difference in priorities between short-term and long-term	19	15
In this nationally conducted research areas such as water supply interruptions, appearance of water and flooding all were seen as high priorities along with speed of response when things go wrong. Areas such as leakage, pollution, biodiversity, and affordability were given a medium priority while	11	12

carbon, drought (including reducing TUBs and NEUBs), bathing water quality and customer satisfaction were seen as less important		
When rating the importance of Anglian Water's activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable	22	10
When asked about their priorities customers ranked as the top three: 38%: Continue to reduce the levels of leakage from our network, 28%: Invest to continue to supply high quality drinking water, 26%: Improve River water quality	32	6
Customers identified their areas of primary concern; Public water leaks (26), Safe and secure water supplies (15), Sewage disposal (20)	33	8
From the community ambassador events the majority of participants ranked **safe, clean water as their top priority** with flourishing environment being their second priority	35	6
Customers currently believe that it's corporations or business leaders that make the decisions. They don't feel that their own thoughts or opinions would make a difference and impact Anglian Water's business plan. Customers would need to see/hear about the tangible actions taken as a result of their feedback to know that customer consultations are not done in vain.	42	6
The majority of customers place the most importance on areas that have a direct impact on their lives, such as water supply and quality. Customers feel these areas should be prioritised when it comes to the short/medium term future for Anglian Water to address and by feeding back on these topics it's more likely to leverage community spirit and boost engagement.	42	6
Many customers feel lacking in their water saving knowledge and support and are open to receiving this from Anglian Water. Educating customers on ways they can reduce their own usage, as well as giving them the ability to track their own usage through the installation of smart meters, is considered an important step to customers in the preservation of water supplies.	33	8
When it comes to environmental concerns, the availability of water supplies is of utmost importance to customers. Customers want to see action taken to protect available resources, including reducing water wastage through reducing leaks, eliminating pollution of water sources and educating the public on water saving methods. In addition, customers would like to see an increase of water storage capacity (i.e., reservoirs) to help in times of low rainfall.	33	8
When it comes to water supply measures that Anglian Water could put in place, customers want AW to focus on reducing leaks, for example reacting to bursts in water pipes and replacing pipes before they burst. Other things they want to see are a reduction of the interruptions of water supply, and guaranteed compliance within water treatment works. It's viewed as less important to invest in imposing drought restrictions, unplanned asset failures and looking at properties at risk of low pressure. When it comes to water recycling, customers want to see AW utilising water from floods inside of properties, blocked sewers, and pollution incidents. Other key areas include utilising flood water when it's outside of the property, maintaining the natural environment and providing excellent water supply on the local beaches. Less important is the focus on carbon emissions from day-to-day activities and supply chains.	58	9
When shared a mix of improvements to both maintain assets and protect for the future at a cost of £21 increase over the AMP more than two thirds (65%) of customers felt that this proposal was acceptable. This seems driven by a perception that it's worth paying extra to ensure high quality and reliable supply of water. Additionally, customers felt that £21 over 5 years is a reasonable, achievable amount. It's worth noting however, that these opinions are valid only if Anglian Water carry out their proposed improvements within this timeframe. Customers want to see visible or tangible evidence that their additional investment has made a difference. About one fifth (18%) of customers, however, disagree with this increase and feel that the financial hit should be taken by shareholders, rather than customers.	58	9

Also, in the current cost of living crisis, some feel that any increase in customer bills is unacceptable and should be considered only in the future once this crisis is over. They feel that Anglian Water should delay any increase to bills until the economy has recovered. If customers had a clearer indication of what Anglian Water is specifically spending this additional money on (on how it will benefit them financially and otherwise in the future), it might reassure them and open them up towards financing the additional costs.		
The percentage of customers that supporting investing in the minimum v's enhanced option when presented with different options. 	38	15
When presented with a number of options on investment areas this combination was the most preferred. 	38	15

Household valuations	65	15



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Unplanned interruptions	£1,200,000 (± £800,000)	Per 1,000 less properties affected (6-12 hours)
Severe water restrictions (rota cuts)	£29,000 (± £26,000)	Per additional year of avoided risk
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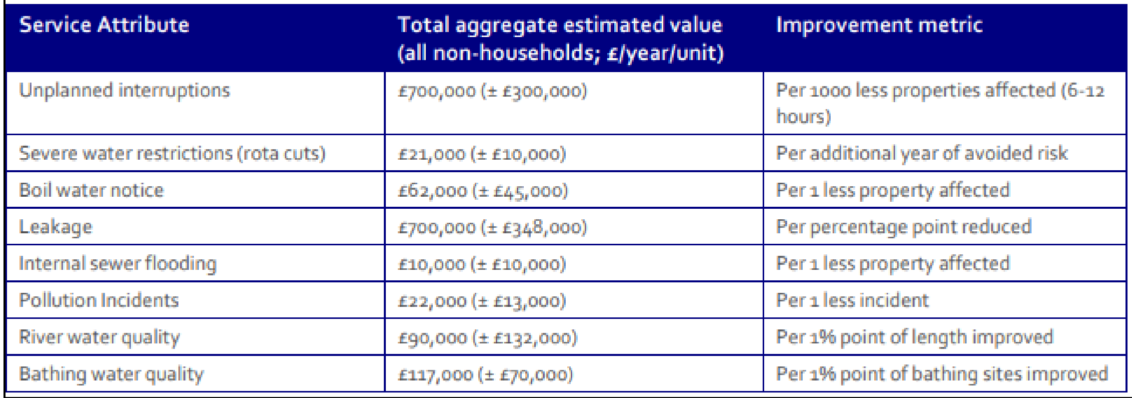
Non-household valuations	65	15



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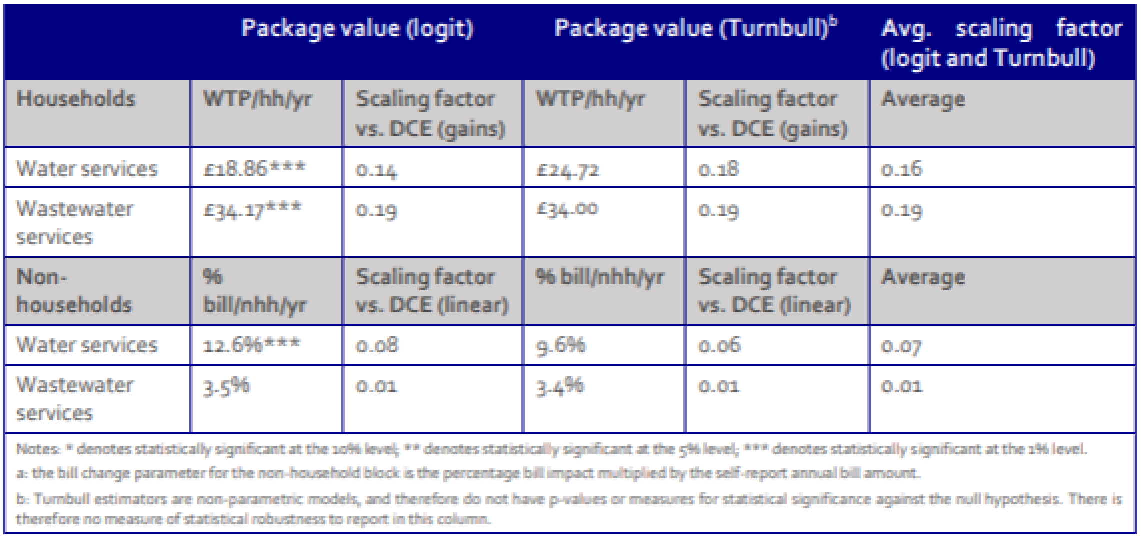
Maximum WTP for maximum improvement package	65	15



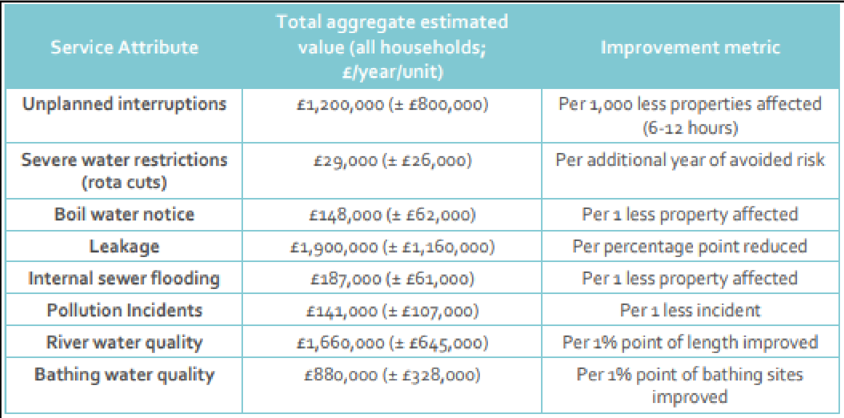
	Package value (logit)		Package value (Turnbull)[b]		Avg. scaling factor (logit and Turnbull)
Households	**WTP/hh/yr**	**Scaling factor vs. DCE (gains)**	**WTP/hh/yr**	**Scaling factor vs. DCE (gains)**	**Average**
Water services	£18.86***	0.14	£24.72	0.18	0.16
Wastewater services	£34.17***	0.19	£34.00	0.19	0.19
Non-households	**% bill/nhh/yr**	**Scaling factor vs. DCE (linear)**	**% bill/nhh/yr**	**Scaling factor vs. DCE (linear)**	**Average**
Water services	12.6%***	0.08	9.6%	0.06	0.07
Wastewater services	3.5%	0.01	3.4%	0.01	0.01

Notes: * denotes statistically significant at the 10% level; ** denotes statistically significant at the 5% level; *** denotes statistically significant at the 1% level.
a: the bill change parameter for the non-household block is the percentage bill impact multiplied by the self-report annual bill amount.
b: Tumbull estimators are non-parametric models, and therefore do not have p-values or measures for statistical significance against the null hypothesis. There is therefore no measure of statistical robustness to report in this column.

When customers were shown a range of ODI packages they preferred a 3% RORE incentive level overall. • There are very mixed views about the highest and lowest options with customer polarised • Segmentation shows that younger and future customers prefer lower variability whereas customers in vulnerable circumstances prefer higher variability.	91	15

Customers are generally supportive of incentives - almost three quarters of customers (74%) think incentives are important – both outperformance payments and penalties. Customers want incentives to drive performance, but bills need to be reasonably predictable for households to budget.	91	15
Customers support both common and bespoke incentives. • Three quarters of customers agree that bespoke incentives are important, and incentives should reflect their priorities beyond Ofwat's standard incentives. Customers want a mix of incentives - some for the long term and some about delivery today.	91	15
• Customers rank monitoring and maintaining drinking water quality (Compliance Risk index) as the most important PC for a financial incentive. This is followed by pollution incidents. • Proposed bespoke PC (turquoise bar) are distributed throughout common PCs in terms of importance. 	91	15
Some bespoke PCs – customers unable to use their toilets, supporting vulnerable customers, improving river ecology and amenity in particular – are a higher priority for customers than some Ofwat PCs. This supports the business case for Anglian Water including these bespoke commitments alongside statutory ones.	93	14
Several bespoke PCs, including (reducing) carbon emissions from construction, working in partnership, and climate resilient networks, are less likely to be mentioned as high priorities. But just because they are not high priorities does not necessarily mean they are low priorities, with many customers (74%+) mentioning them as medium or high priorities. So, Anglian Water should still consider making a business case for them.	93	14
Some of the PCs are a lower priority for customers because they feel the issue does not need to be addressed within the next 5 years (but potentially they may within a longer timeframe), especially customers unable to use their toilets.	93	14

The cost to deliver (reduced) carbon emissions from construction (a '££' investment) and taking less water from environmentally-sensitive sites ('££') is a significant barrier to investment priority.	93	14
For some, the bespoke PCs explored the belief that they (customers) won't be affected by the issue, was a barrier for several PCs, especially sewage flooding of gardens, as well as a lack of clarity around what working in partnership involves.	93	14
Customers are highly budget-conscious - priorities are largely determined by the perceived impact on customers' pockets, with lower cost commitments being favoured overall. When low cost is paired with a quick timeline, this is the optimum scenario. With one exception - customers who appear to be more environmentally-conscious tend to be willing to pay more to protect, or minimise damage to, the environment, therefore prioritise commitments that are highly environmentally-focused. Any approach taken must take into account the need to meet basic customer needs without having any (or too much) negative impact on the environment.	97	9
Where commitments are perceived to require extensive planning, coordination with partners and infrastructural developments, customers feel more time should be given to their implementation, or that they should be worked on in the background of other immediate impact priorities, rather than prioritised. Customers have less faith and feel quite far removed from this sort of commitment - they feel big, daunting, costly. There is a need to reassure the customer here to boost perceptions that you are experts and in control, **ensuring any comms are jargon-free**.	97	9
Many customers share that they feel you should be taking action to meet these commitments already, at least to some extent. There is very little knowledge on what has been or is already being done; the assumption is that you are doing nothing, which upsets and frustrates customers. To boost brand affinity and trust, more could be done to communicate the good work that Anglian Water are doing in these areas and what you have already achieved, especially any wins in comparison to other water companies; shining light on future plans shouldn't overshadow the past and the present.	97	9
Understanding of PCs is driven by context: in each commitment, to be able to fully understand and buy into the proposal, customers need to know the ins and outs - the hows, whys, and ifs and how it will impact them personally. There are lots of concerns about why these plans aren't already in place, so more benchmarking and explanation of the past/present/future situation is needed. Non-committal language: customers expect more force and commitment - they want to see you saying you will do something instead of can/might. This could lead to lower brand trust levels and raise concerns around what you say vs. what you do. Use of 'can' is also leading some to wonder 'if it can be done, why is it not in place already?'	99	7
'Reducing the disruption from road work' and 'maximising the value of effluent' were the most understood bespoke PCs tested with customers.	99	7
Household valuations	118	14



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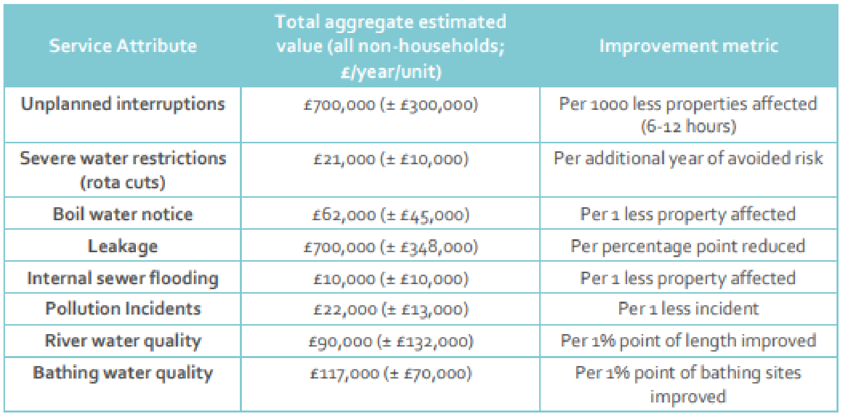

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From the synthesis report for the WRE region some of the top investment priorities were reducing leakage and investing in the environment. Making sure bills are affordable was important to a majority of customers. There was no clear consensus on whether investments should be made sooner or later. Some older customers were unwilling to pay more now as they wouldn't be around long enough to benefit, whilst others wanted to pay now to limit how much future generations would have to bear the cost later.	121	11

PR19 Key Messages (drawn from the AW PR19 report)

From the work conducted to support the development of the Strategic Direction Statement and PR19, customers ranked the importance of the high-level outcomes as below:

1 – Safe, clean water (97%)
2 – Supply meets demand (93%)
3 – Fair charges – fair returns (92%)
4 – Satisfied/delighted customers (91%)
5 – Resilient service (86%)
6 – Flourishing environment (83%)
7 – Investing for tomorrow (82%)
8 - Caring for communities/positive impact on communities (81%
9 – A smaller footprint (74%)

In contrast, the PR19 Acceptability Testing looked at the percentage of customers that found areas of high importance and found flooding and pollution incidents featuring as more highly prioritised:
Sewer collapses - 87%
Pollution incidents - 86%

Internal sewer flooding - 83%
Mains repairs - 82%
Supporting customers in vulnerable circumstances (PSR reach) - 79%
Leakage - 68%
External sewer flooding - 68%
C-MeX - 66%
Reactive mains bursts - 65%
Treatment works compliance- 57%

The two studies approached prioritisation differently; the first explored at a high (outcomes level) while the second was more detailed and directly related to service failures that could impact the customer – this may be the reason we see a difference in scoring.

What do the majority of insights suggest?

There are many similarities between customer priorities and where customers want AW to invest more but there are a few notable areas where there is a difference in views. This is, however, a difficult trade-off for customers and the findings across surveys are varied depending on materials shared and areas explored. Primarily, the main difference is in the area of safe clean water – which is always seen as a high priority for customers, but regarding investment, this drops down the ranking with investment in lead pipe replacement being ranked the 5th priority area out of 8 areas shown to customers in a recent study, and being identified for delaying investment as part of a package of options. This also aligns with the WTP work, which, out of the eight areas valued, boil water notice ranks sixth out of the eight areas. This suggests that, although this is a very important area for customers, they see it as not needing additional investment, certainly in the short term. This is further verified by the work on PCs which shows customers placing the importance on a PC for water quality at the top of the list of importance.

Water supply interruptions and leakage remain high priorities for investment and score very highly in recent willingness to pay studies – this may be driven by a wider awareness of the issues due to the droughts of summer 2022. The preference for investment in river water quality and reducing pollutions again moves, dependent on the study. River water quality has a high valuation through PR24 WTP and, in PR19 research, scored highly in terms of areas to invest in. Although it is not prioritised as highly as other areas in a recent PR24 study, when selecting a package of options, customers did choose stopping spills from sewers as part of that package which related to half (£6) of the shown bill increase (£12). It is certainly an area from a stakeholder perspective that is receiving much focus. When customers have been engaged regarding how you incentivise investment through performance commitments and rewards and penalties, they are generally supportive of incentives, with almost three quarters of customers (74%) thinking they are important – both outperformance payments and penalties. Customers want incentives to drive performance, but bills need to be reasonably predictable for households to budget.

Cost can be a barrier to wanting to see an improvement in importance – particularly carbon reductions and river abstraction reduction are highlighted as areas where costs could be the limiting factor for customer preferences.

When communicating about delivery and performance, customers want transparency – clear, jargon-free language, providing context and relatability to any communications.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

None.

Are there any insights which contradict the above?

There were some differences noted in the more recent research with women ranking ‘providing nature-based solutions’ much higher than men (third in ranking for women compared to below average for men). Future customers ranked reducing carbon footprint more highly and leakage less high compared to those who were aged 45 plus.

What do our stakeholders think?

CCW in their 2021 ‘Water Matters’ report cite four key areas of focus:

- End Water Poverty – and discuss working with companies to introduce a single water affordability scheme.
- End Sewer Flooding Misery – asking companies to commit to immediate, short-term and long-term action to improve their sewer flooding responses.
- Don’t Let People Suffer in Silence - identifying the barriers that prevent people from making complaints about service issues such as low pressure and supply interruptions.
- People and the environment- they discuss how the environment is an issue that many people can relate to, but they struggle to understand water companies’ roles and the impact of their own behaviour.

There is wide public interest in the reduction of storm overflows and pollutions with many national and local organisations sharing concerns and a call for investment.

3.Customers’ priorities – safety vs aesthetics

When thinking about drinking water as a priority, is it safety or aesthetics (look, feel, taste) that are more important?

New Insights	Source	Score
Continuing to supply high quality drinking water was the most important priority by far now and in the future with all customers	19	15
In this nationally conducted research areas such as water supply interruptions, appearance of water and flooding all were seen as high priorities along with speed of response when things go wrong. Areas such as leakage, pollution, biodiversity, and affordability were given a medium priority while carbon, drought (including reducing TUBs and NEUBs), bathing water quality and customer satisfaction were seen as less important	11	12
When rating the importance of Anglian Water’s activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable	22	10
When asked about their priorities customers ranked as the top three: 38%: Continue to reduce the levels of leakage from our network, 28%: Invest to continue to supply high quality drinking water, 26%: Improve River water quality	32	6
Customers identified their areas of primary concern; Public water leaks (26), Safe and secure water supplies (15), Sewage disposal (20)	33	8
From the community ambassador events the majority of participants ranked **safe, clean water as their top priority** with flourishing environment being their second priority	35	6
The majority of customers place the most importance on areas that have a direct impact on their lives, such as water supply and quality. Customers feel these areas should be prioritised when it comes to the short/medium term future for Anglian Water to address and by feeding back on these topics it’s more likely to leverage community spirit and boost engagement.	42	6
When it comes to water supply measures that Anglian Water could put in place, customers want AW to focus on reducing leaks, for example reacting to bursts in water pipes and replacing pipes before they burst. Other things they want to see are a reduction of the interruptions of water supply, and guaranteed compliance within water treatment works.	58	9

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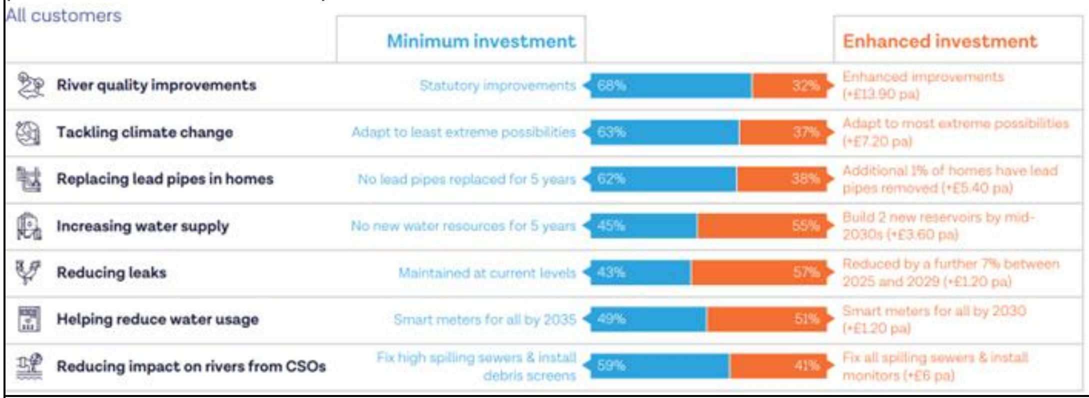 </td><td>38</td><td>15</td></tr>
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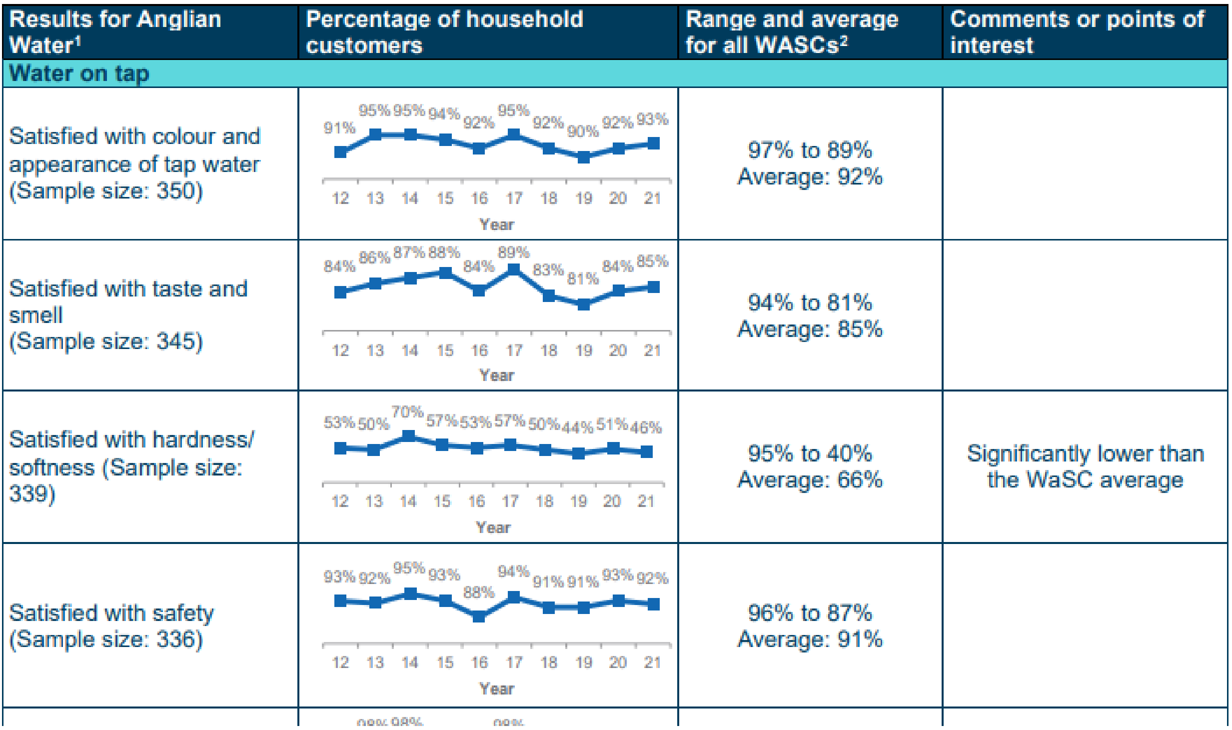
80% of customers surveys put safe, reliable drinking water in their top 3 priorities but safety (91%) is much more important than appearance (6%).	93	15
	95	8

Results for Anglian Water¹	Percentage of household customers	Range and average for all WASCs²	Comments or points of interest
Water on tap			
Satisfied with colour and appearance of tap water (Sample size: 350)	91% 95% 95% 94% 92% 95% 92% 90% 92% 93% 12 13 14 15 16 17 18 19 20 21 Year	97% to 89% Average: 92%	
Satisfied with taste and smell (Sample size: 345)	84% 86% 87% 88% 84% 89% 83% 81% 84% 85% 12 13 14 15 16 17 18 19 20 21 Year	94% to 81% Average: 85%	
Satisfied with hardness/ softness (Sample size: 339)	53% 50% 70% 57% 53% 57% 50% 44% 51% 46% 12 13 14 15 16 17 18 19 20 21 Year	95% to 40% Average: 66%	Significantly lower than the WaSC average
Satisfied with safety (Sample size: 336)	93% 92% 95% 93% 88% 94% 91% 91% 93% 92% 12 13 14 15 16 17 18 19 20 21 Year	96% to 87% Average: 91%	

PR19 Key Messages (drawn from the AW PR19 report)

From the work conducted to support the development of the Strategic Direction Statement and PR19, customers ranked the importance of the high-level outcomes as below:

1 – Safe, clean water (97%)
2 – Supply meets demand (93%)
3 – Fair charges – fair returns (92%)
4 – Satisfied/delighted customers (91%)
5 – Resilient service (86%)
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In contrast, the PR19 Acceptability Testing looked at the percentage of customers that found areas of high importance and found flooding and pollution incidents featuring as more highly prioritised:
Sewer collapses - 87%
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Internal sewer flooding - 83%
Mains repairs - 82%
Supporting customers in vulnerable circumstances (PSR reach) - 79%
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External sewer flooding - 68%
C-MeX - 66%
Reactive mains bursts - 65%

Treatment works compliance- 57%

The two studies approached prioritisation differently; the first explored at a high (outcomes level) while the second was more detailed and directly related to service failures that could impact the customer – this may be the reason we see a difference in scoring.

What do the majority of insights suggest?

Most of the research conducted conflates water quality (in terms of safety) with aesthetics (taste, odour and appearance) so it is more difficult to identify the driving view behind responses. However, when research has specifically split out the two areas, it appears it is safety that drives the high priority ranking in the insight. Hardness is one particular area that shows customers' dissatisfaction with recent CCW research, showing only 46% of customers are satisfied, but it is not an area that is particularly highlighted in other insight.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

None

Are there any insights which contradict the above?

Most of the research conducted conflates water quality (in terms of safety) with aesthetics (taste, odour and appearance).

What do our stakeholders think?

The DWI and CCW both track views on both quality and aesthetics with recent CCW research showing customers for Anglian Water 93% satisfied with appearance and 92% satisfied with safety.

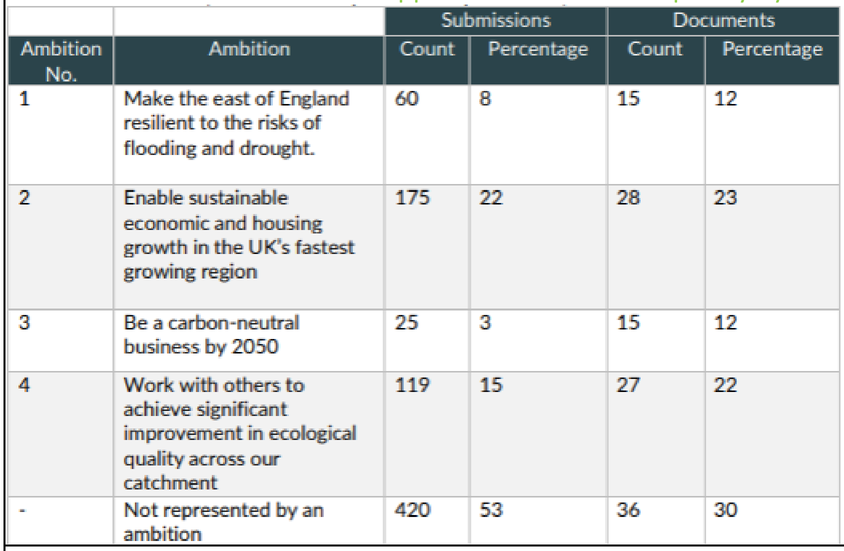
4.Vision, purpose and strategic ambitions

Do customers support Anglian Water's strategic ambitions?

New Insights	**Source**	**Score**
Continuing to supply high quality drinking water was the most important priority by far now and in the future with all customers	19	14
Leakage was seen as the second priority and despite the high cost replacing lead pipes was seen as much a priority as leakage	19	14
Improving river water quality also featured well above average in the prioritisation exercise	19	14
Increased resilience to drought is important in the absence of cost – but the high cost of addressing is a barrier for customers	19	14
Nature based solutions, increase in the resilience to flooding and additional support for vulnerable customers all rank highly with little difference in priorities between short-term and long-term	19	14
There were no differences in investment priorities between short term and long-term spending	19	15
When rating the importance of Anglian Water's activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable	22	9

When asked about their priorities customers ranked as the top three: 38%: Continue to reduce the levels of leakage from our network, 28%: Invest to continue to supply high quality drinking water, 26%: Improve River water quality	32	5
Customers identified their areas of primary concern; Public water leaks (26), Safe and secure water supplies (15), Sewage disposal (20)	32	7
Thinking about what concerns customers most for the future (worst case scenario): Most customers imagine a rise in population in the next 30 years with many concerns about the negative impact that this will have on the environment and food and water supply/demand. There is an assumption that green spaces will be consumed by housing, and that infrastructure will break under the pressure of outweighed demand. Customers have a general concern about more frequent extreme bouts of weather such as heatwaves and flooding as a result of rapid climate change. Increased population is also expected to lead to more flooding; there will be less natural drainage space. Rising sea levels could drive population inwards and lead to denser populated inland areas. General quality of life is expected to significantly reduce for all but the richest; Customers envisage more civil unrest as a result of fighting over resources (energy, food, water) with the end outcome being an increased risk of war. Some also think there will be a reduction in the desire to reproduce, and/or compulsory limits on number of children born, leading to problems with an ageing population. The consensus is that action needs to be taken immediately and swiftly in order to avoid some worrying scenes in the future	59	9
Biggest challenges: Water supply: Customers are aware that the population in the East of England is growing rapidly and there are concerns that the number of new developments mean that not only will there be insufficient water to sustain the new households, but current residents will also face an increased shortage. Flood risks: Already a current concern for many, customers perceive the flood risks to worsen in coming years and want action now to help prevent flooding (and to a slightly lesser degree, drought). This also applies to new developments being built on floodplains. Environmental impact and pollution: As the climate is a top-of-mind concern for many, customers want to be sure that Anglian Water will not be contributing to worsening the situation. Most feel that environmental factors such as biodiversity and keeping waterways clean are essential to the health of the area and its residents. Leaks: Customers want to see a modernisation of infrastructure in the coming years and envisage leaks to become a problem in the future if this fails to happen.	59	9
Good in the future looks like: Water supply- A good outcome in 10 years' time would be sufficient water supply for the population, a significant reduction of leaks (to almost none) and minimising impact on the environment, with Anglian Water taking the steps to begin to implement more innovative and more reliable infrastructure. A good outcome in 25 years' time would be an ample water supply for the increasing population, better infrastructure is well implemented and in use, including more reservoirs and homes equipped with water saving devices. Anglian Water are working hard to stay ahead of the curve with innovative technologies. Infrastructure- A good outcome in 10 years' time would be beginning work to have pipes replaced, upgraded and future proofed resulting in less future maintenance. Plans laid out to tackle flooding.	59	9

A good outcome in 25 years' time would be completing work to have pipes replaced, upgraded and future proofed resulting in less future maintenance. Plans completed and floodplains no longer an issue. Environmental impact - A good outcome in 10 years' time would be stopping the negative impact including no longer discharging untreated sewage. Customers also want to see more focus on improving wildlife habitats in the region. A good outcome in 25 years' time would be actively having a positive impact on the environment and having wildlife flourish.		
Regarding the SDS ambitions: The 4 key ambitions as a set are generally well received by the majority of customers, as they are relevant and in line with expectations. A minority feel like they're missing quantifiable measures and feel unachievable – they need more context (particularly costs) and evidence before they can put trust and reliance into the ambitions. Cost to consumers is high on the list of customer concerns, so while most agree with the ambitions set out, they feel they shouldn't be at great cost to customers. Customers need more information on the financial impact of these ambitions to provide true feedback. Concerns surround population growth in the region, and some believe that housing growth should be halted due to insufficient water supply. For some, becoming 'carbon-neutral' feels like an unattainable goal and few feel that it isn't as important as it sounds, wanting tangible environmental impact through AW's actions instead. Others feel that carbon neutrality should be at the core of future plans as other ambitions, such as tackling droughts and floods and improving ecological quality, will be positively impacted. 89% report that the ambitions feel relevant (the majority of this figure coming from the 69% that feel they are highly relevant) The vast majority of customers recognise the relevance of the ambitions regarding local issues, like housing, as well as national and global issues, like climate change. 82% feel the ambitions are acceptable. This is driven by most customers feeling that the goals are aspirational yet realistic and are keen for Anglian Water to work alongside other organisations to help attain these goals successfully. Some feel like this is the minimum that Anglian Water should be doing, and more should be done to meet these goals much quicker. A minority also worry that these may be over-stretching at cost to customers and water quality. 81% of customers agree that these ambitions are set with future generations in mind. However, some mention worries over current water supply and quality too. Others also note that as things like climate change develop so rapidly, these ambitions may not be enough for future generations. Anglian Water should ensure they make it clear that planning for the future does not cloud achieving success in the now. 74% feel the ambitions substantially match their own views; most customers relate to at least 2 or 3 of the ambitions, if not all of them in some way. Here, many noted their concern surrounding costs to the customer and felt like while they agree with and support these ambitions, this is dependent on the fact that their bills wouldn't substantially increase to achieve them.	59	9
From the ongoing tracker, performance on trust dipped in March, following marginal improvements between November and February.	94	10
An analysis of the comments provided by the least trusting customers suggests that while their primary concern is price, they are also more likely to reference sewage or water quality issues.	94	10
To build trust and transparency for AW, customers need: More information around local river water quality –Including a much more top-level overview that focuses on local areas from the get-go. When using technical language and lots of stats, our customers feel like we're trying to mask over something.	98	7

<table>
<tr><td>More information to track AW actions and progress in these areas - customers want to see AW being more upfront and honest about the negatives, flagging sewage/pollution, with supporting information on severity level and how this is being managed.
Customers also want up-to-date, ideally real-time, information. Some notice that the data is not up-to-date and don't respond well to this, as they aren't sure how useful it is. The ultimate tool would show data from now and the recent past, but also highlight what's in the pipeline (work AW is doing, improvements being made etc.)</td><td></td><td></td></tr>
<tr><td>Across the 70 documents analysed, from a breadth of stakeholders across the region, the following areas appear consistently as high priorities: biodiversity (general), climate change, economic growth, public services & infrastructure, cultural services, health & wellbeing, recreation/tourism, communities/housing.</td><td>111</td><td>8</td></tr>
<tr><td>The analysis shows 47% of the submissions and 70% of the documents aligned with an AW ambition, whilst 53% of submissions are not clearly represented. There were many submissions from local government documents on economic and housing growth which therefore shows good alignment with Ambition 2. Biodiversity-related objectives were important to all organisation types which therefore shows good alignment with Ambition 4. In comparison, Ambitions 1 and 3 are less aligned with stakeholder views. Two of the broad objectives with a high volume of submissions – Quality of Life and Infrastructure – do not appear to be covered explicitly by an AW ambition.

<table>
<tr><th></th><th></th><th colspan="2">Submissions</th><th colspan="2">Documents</th></tr>
<tr><th>Ambition No.</th><th>Ambition</th><th>Count</th><th>Percentage</th><th>Count</th><th>Percentage</th></tr>
<tr><td>1</td><td>Make the east of England resilient to the risks of flooding and drought.</td><td>60</td><td>8</td><td>15</td><td>12</td></tr>
<tr><td>2</td><td>Enable sustainable economic and housing growth in the UK's fastest growing region</td><td>175</td><td>22</td><td>28</td><td>23</td></tr>
<tr><td>3</td><td>Be a carbon-neutral business by 2050</td><td>25</td><td>3</td><td>15</td><td>12</td></tr>
<tr><td>4</td><td>Work with others to achieve significant improvement in ecological quality across our catchment</td><td>119</td><td>15</td><td>27</td><td>22</td></tr>
<tr><td>-</td><td>Not represented by an ambition</td><td>420</td><td>53</td><td>36</td><td>30</td></tr>
</table></td><td>111</td><td>8</td></tr>
<tr><td>**Safe, clean and reliable water** 1. Stakeholders noted the importance of ensuring sufficient water supply for the future in East Anglia, particularly through mentions of sustainable and efficient water supply and use, sustainable abstraction, and avoiding deterioration of water resources. 2. Protecting and improving water quality was identified as a priority, with stakeholders linking it to a variety of themes including sustainability and resilience, healthy habitats for wildlife, and pollution reduction. 3. Water management stakeholders prioritised flood risk management, emphasising that solutions need to be sustainable. 4. Water management stakeholders frequently mentioned biodiversity, specifically, ensuring that water use and management in the region does not deplete, or even enhance, the natural environment.</td><td>111</td><td>8</td></tr>
<tr><td>**Responsible business** 5. Carbon storage and sequestration were priorities for many, with stakeholders noting their desire to support, protect, maintain, or increase elements that have the potential to store and sequester carbon such as soils, peatlands, wetlands and farmland. 6. Stakeholders from farming, designated areas, water management, and UK government prioritised carbon storage and sequestration. 7. Decarbonisation and net zero were noted as objectives by a</td><td>111</td><td>8</td></tr>
</table>

range of water management, private sector, and government stakeholders. 8. The importance of increasing and improving access to green space and nature was emphasised by a range of stakeholders. 9. Aesthetic value of the landscape was only explicitly prioritised by several local governments and designated areas. However, note that specific landscapes and heritage features were prioritised (see Statements 14 and 17). 10. Affordability was prioritised only by local government stakeholders in the context of housing.		
Flourishing environment 11. Stakeholders frequently mentioned implementing natural capital actions to enhance biodiversity. 12. Stakeholders frequently mentioned implementing natural capital actions to mitigate the effects of climate change on the environment. 13. Stakeholders frequently mentioned implementing natural capital actions to enhance ecosystem services, specifically water and air quality. 14. Some local councils and designated areas prioritised protection and maintenance of specific terrestrial features and landscapes, including tree cover, countryside, heathland, and unique local landscapes such as The Broads. 15. The importance of the coastline to the East Anglia region was noted across the board by stakeholders, in a variety of contexts - protecting biodiversity, managing for flood protection and against erosion, recreation, and aesthetics.	111	8
Other areas mentioned by stakeholders 16. Local councils emphasised the need to incorporate sustainability and environmental standards in new housing developments. 17. Local governments noted the value and necessity of maintaining their region's culture, heritage, and aesthetics into the future. 18. Economic growth and development was a frequently mentioned objective amongst local governments. Themes around economic growth included sustainability, skills development, rural economy, tourism and leisure. 19. Local governments expressed a range of objectives around infrastructure, particularly surrounding improvement of and increase in walking, cycling, and public transport routes.	111	8
PR19 Key Messages (drawn from the AW PR19 report)		
Overall, acceptability of the Strategic Direction Statement was high, although views varied by customer segment. Customers generally felt the company has identified the right long-term challenges and goals. They also viewed all the outcomes as important. Overall, customers seemed to prioritise: affordability and customer expectations (of the six major challenges); safe clean water, supply meets demand, fair charges and satisfied customers (of the ten outcomes); achieving 100% chemical-free drinking water, zero pollutions and flooding and zero leaks and bursts (of the seven water quality and customer satisfaction goals); and resilience (of the four stretching long-term goals). All major attributes (relating to water, sewerage and wider services) were considered important. For many of these, customers were keen to maintain rather than improve performance (as satisfaction is generally high already). However, customers were willing to pay for improvements if they are judged to be pertinent and value for money. Customers generally prioritised improvements that had a wider impact across the region (e.g. leakage, river water quality and pollution), and they had a strong preference for avoiding deterioration in service levels, especially in relation to environmental outcomes (e.g. bathing water quality, river water quality and pollution incidents) and aspects of the service that have a high and direct impact on customers (e.g. internal sewer flooding, and severe water restrictions). For household customers, willingness to pay for improvements varied by income/socio-economic grade. Improvements in water services appeared to be more important in customers' decisions to support a package of service changes than improvements to the waste service. Most customers who were consulted on the PR19 plan supported it, felt reassured that the company was addressing the right issues, and felt that proposed bill increases were justified. There was support for the company going "beyond the minimum" to invest for the future. Acceptability of the plan increased when customers were better informed about it. Most customers felt targets in the plan are sufficiently stretching, although household customers (in particular) didn't always feel they had the expert knowledge to judge this. Non-household customers were more likely than household customers to think targets are sufficiently stretching.		
What do the majority of insights suggest?		

Recent priorities work does confirm customers' priorities over the short and long term do not differ significantly. The priorities work done to date generally aligns with the findings of the PR19 research conducted on the SDS. The key differences noted are look more at a shift in the priorities in the SDS than fundamental changes. Drought resilience, nature-based solutions, river pollution and reducing carbon footprint have potentially moved in priority – possibly due to public awareness, but this still aligns with the ambitions set out in the SDS. Affordability is a key feature of the SDS and is a key area highlighted through the more recent research, but the balance between short- term and long-term affordability has not recently been tested with customers. The four key ambitions as a set are generally well received by the majority of customers, as they are relevant and in line with expectations. A minority feel like they're missing quantifiable measures and are unachievable – they need more context, particularly costs, and evidence, before they can put trust and reliance into the ambitions. Trust and transparency are key areas to consider when reviewing wider support. While overall price plays a part, issues and news regarding river water quality reduce this trust.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Regulatory ambition is a key influencer in this area, with Ofwat, Environment Agency, Natural England and CCW all having key inputs into the wider ambition of the industry.

Are there any insights which contradict the above?

There were some differences noted in the more recent research with women ranking providing nature-based solutions much higher than men (third in ranking for women compared to below average for men). Future customers ranked reducing carbon footprint more highly and leakage less high compared to those who were 45 plus.

What do our stakeholders think?

Ofwat has three strategic purposes:

- To transform water companies' performance for customers;
- To drive water companies to meet long-term challenges through increased collaboration and partnerships;
- For water companies to serve a wider public purpose, delivering more for customers, society and the environment.

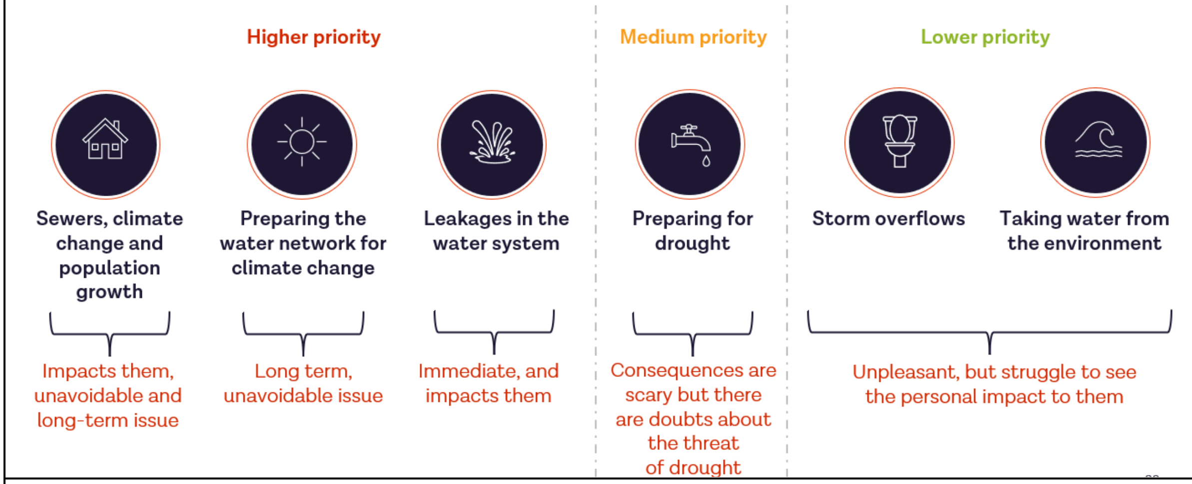
The EA has set out its ambitions for the future of water; including the scale of action needed to ensure resilient water supplies are available to meet the needs of all users in the future and a greater level of ambition for restoring, protecting and improving the environment that is the source of all our supplies. Natural England's focus is: a well-managed Nature Recovery Network across land, water and sea, which creates and protects resilient ecosystems rich in wildlife and natural beauty, enjoyed by people and widely benefiting society, and people connected to the natural environment for their own and society's wellbeing, enjoyment and prosperity; nature-based solutions contributing fully to tackling the climate change challenge and wider environmental hazards and threats and improvements in the natural capital that drives sustainable economic growth, healthy food systems and prospering communities.

Detailed desktop analysis shows across the stakeholder groups biodiversity (general) , climate change, economic growth, public services & infrastructure, cultural services, health & wellbeing, recreation/tourism, communities/housing are their top priorities.

5.Balancing affordability and ambition

How would our customers like us to balance ambition and cost across the next 25 years?

New Insights	Source	Score
There were no differences in investment priorities between short term and long term spending	19	15
Smart metering is given greater priority by those with children at home and future customers	19	15
Future customers rank reducing carbon footprint significantly higher than other groups	19	15
When considering a number of water resources plans which span over 50 years, uninformed customers chose the cheapest plan overall. Once informed, the choice of preferred plan was more spread, with the plan having the widest environmental benefit changing its preferred ranking the most – with 27% of participants now choosing this plan (29% still chose the cheapest plan).	31	15
When asked the importance of bill impact vs service improvement, 29% prioritised reducing bill impact as most important, while 20% rated service improvement. Although Hartlepool customers are keener on keeping bills lower.	38	15
When shown a mix of enhanced services at a higher cost (greater than £5) the majority of customers went for the minimum investment option.	38	15
The majority of customers prefer a modest investment programme with a small bill increase (max £6) – however, there is moderate support for a more ambitious investment programme with a bill increase of £10-£12 based on direct questioning; roughly 75% of customers would accept this level of increase.	38	15
Customers prefer a variety of smaller, lower cost investments vs. one large scale, more expensive investment.	38	15
When shown a bill increase of £21 over 5 years, 65% of customers found it acceptable, but in the current cost of living crisis some feel that any increase in customer bills is unacceptable and should be considered only in the future once this crisis is over. They feel that Anglian Water should delay any increase to bills until the economy has recovered.	58	9
There has been a significant drop from 84% to 77% of customers who think the services are affordable.	95	8
48% of households are currently finding it difficult to manage financially or are just getting by, and 43% of households are expecting their financial situation to get worse up to 2030.	109	12
Currently, 37% of households can afford their existing water and sewerage bills fairly or very easily. 14% of uninformed household customers thought that the proposed bill tested would be fairly or very easy to afford. This increased to 16% once informed.	109	12
69% of customers tested felt the plans shared were acceptable, with support for the long term and focus on the right services being the main two reasons for that support. Of the performance commitments, shared leakage for water and reducing pollution incidents were the most important to customers.	109	12
When asked about phasing of investment, 35% of household customers were unable or unwilling to answer the question on phasing in a decisive way. The preferred phasing option amongst those able to choose was for an immediate increase in bills rather than a delay.	109	12
The current permacrisis backdrop means people are focused on the short term and day-to-day living. Anglian Water need to root future problems in the 'now' e.g., emphasise the risks of not investing in certain areas today.	110	12

There is a lack of engagement with water supply beyond clean, consistent running water and it is only thought about when there's a problem. Anglian Water could be more visible in the community to showcase the complex process water goes through to get it to the tap.	110	12
There is low awareness of Anglian Water's responsibilities and the interplay between other bodies, such as the government. In order to get the public on board with future bill increases, they need to understand Anglian Water's role and how you work with other bodies to improve the water network.	110	12
People prioritise issues where they feel directly impacted by them, or where they seem like unavoidable threats. Anglian Water should focus their investment efforts on the higher priority areas.  	110	12
Customers want to see an efficient investment approach and believe that tackling the bigger structural problems first will have a positive knock-on effect on other areas. Anglian Water should focus on 'steadying the ship' and getting the infrastructure future-proofed first.	110	12
Customers are looking for stability and control and therefore prefer a smoothed-out approach to billing increases. They also want reassurance that other bodies (e.g., government) are playing their part. Anglian Water should adopt a smoothed-out approach and demonstrate the direct impact of the investment and how it's benefitting people.		
The customer board (n7) had mixed views regarding increasing investment – more immediate issues such a sewerage capacity and mains repair prompted more positive responses. There was, however, a strong desire for AW to plan for future challenges such as climate change, population growth and drought.	112	8
Customers are sceptical about the term 'net zero' and perceive it as a buzzword without meaningful actions or benefit to customers behind it. Educate customers about what 'net zero' means in the context of Anglian Water's operations and its tangible benefits for reducing environmental impact, to increase support in this area. Provide a comprehensive breakdown of the specific strategies and actions that AW will implement to achieve net zero to make the goal feel achievable and showcase feasibility.	117	9
When promoting the price increase, use the smallest increments to reassure customers that it's not a large jump in comparison to what they're already paying for their current water bill (e.g., 20p increase price per day rather than the yearly increase).	117	9
To maintain customer support and agreement in the plan, focus on areas of top priority for customers where customers can identify a clear benefit to themselves. (e.g., future-proofing water supply and demand and increasing water quality). To enhance the benefit to customers, showcase	117	9

preventative over reactive maintenance to represent what is being done to ensure they still have a consistent water supply long term.		
Asking schoolchildren about plans, they prioritise more of the long-term/environmental areas compared with other research and opt for the higher bill increases explored (£37.50) to ensure improvements.	120	7
This research with intergenerational groups teased out differences in the priorities for short-term Investment, but highlight broad agreement that key concerns for the future are financial and environmental. For the middle generations the cost of living/rising costs and uncertainty surrounding what will happen to the economic climate are top of mind.	127	12
Anglian Water's LTDS was widely welcomed, although generations wanted to see faster delivery of at least some areas, and AW's five ambitions were broadly supported.	127	12
Despite the current cost of living crisis, the majority across the different generations would rather see bill increases sooner, driven largely by a sense of intergenerational fairness and the need to address investment areas promptly.	127	12
Those providing a customer satisfaction rating of 7 or 8 most often stated that they would like to see a reduction in prices.	133	11
Final affordability testing showed 22% thought the plans were affordable (19% HH and 29% NHH).	134	14
Over a third of customers were unable or unwilling to answer the question on phasing in a decisive way regarding the final business plan, but the preferred phasing option amongst those able to choose was for an immediate increase in bills rather than a delay (mirroring the findings of the qualitative phase of this A&AT study).	134	14
Over 33%are currently finding it difficult to manage financially; this compares to 34% for business customers.	134	14
Leakage - In qualitative affordability and acceptability testing of the business plan, a proposed performance commitment level of 70 litres per property per day by 2030 was tested with customers. This target was considered acceptable, but feedback suggested it could be more ambitious.	135	14
Water supply interruptions - In qualitative affordability and acceptability testing of the business plan, a proposed performance commitment level of 6 minutes per property by 2030 was tested with customers. This target was considered acceptable in the context of historical performance	135	14
Water quality contacts - In qualitative affordability and acceptability testing of the business plan, a proposed performance commitment level of 0.9 contacts per 1,000 population was tested with customers (NB this figure used the PR19 definition). This target was considered acceptable and represented steady improvement in an area where performance is already good.	135	14
Sewer flooding - In qualitative affordability and acceptability testing of the business plan, a proposed performance commitment level of 1.52 flooding incidents per 10,000 properties for internal sewer flooding was tested with customers. This target was not considered acceptable.	135	14
Pollution incidents - In qualitative affordability and acceptability testing of the business plan, a proposed performance commitment level of 24.5 pollution incidents per 10,000 km sewer was tested with customers. This target was considered acceptable but feedback suggested it could be more ambitious.	135	14

PR19 Key Messages (drawn from the AW PR19 report)

There was a general support for resilience through the PR19 research, with some customers wanting to know more about what the company is doing to boost resilience; others want it to "just get on with it" (as the experts). Knowing that Anglian Water planned 25 years ahead, boosts perceptions of it as a proactive and forward-thinking company. On average, the PR19 research suggests householders were willing to pay an additional £19-£27 and businesses 8%-9% a year for a defined set of improvements (or £29-£35 and 11%-13% excluding zero protest votes). The key reasons customers gave for supporting a set of service improvements was that they offered value for money and a focus on the most pertinent issues. Improvements in water services appeared to be more important than improvements to the waste service in shaping customer support for a package of improvements. Those customers who supported status quo options were largely motivated by satisfaction with current service levels or concerns about affordability. Household customers' willingness to pay for a package of improvements appeared to vary by income/socio-economic grade. Willingness to pay among Hartlepool Water customers was largely consistent with overall results. Customers generally supported going beyond minimum levels of investment to protect water supplies for the future. They also generally supported investing in and paying for improvements earlier rather than later. However, some customers were reluctant to pay more themselves to protect future customers; there was evidence of differences in opinion across customer groups and segments in this regard.

What do the majority of insights suggest?

The PR24 engagement to date has shown there are some indications that wider environmental drivers, such as reducing carbon footprint, are important to customers over the long term and there is potential customer support for plans that focus on those long-term elements. However, there is currently little evidence to support short-term and long-term objectives being different for customers. The cost-of-living crisis seems to have influenced customers' views on the balance of service improvement vs bill impact. Recent research does give moderate support for a £10-12 bill increase to deliver a more ambitious investment programme, but customers are clear they want a spread of investment, not just one single scheme and preventative maintenance over reactive maintenance is favoured. With real concerns demonstrated in recent research regarding the economic climate and uncertainty for customers' financial stability, their priority seems to be more on where they foresee direct impacts on service (and with a lack of connection sometimes between the longer term-drivers of investment and the impact on service, it is important for AW to connect those dots for customers). There is a real struggle in customers' minds where, when looking at intergenerational fairness, a significant proportion want to see AW's priorities delivered at a faster pace. Through questions on phasing, in several exercises customers are concluding immediate increases are needed, rather than delaying for future price reviews. There is a real imbalance, as we see future customers willing to accept bill increases now to support investment and environmental ambition, while those paying the bills are more worried about tomorrow than the next 10 years. When testing qualitatively new performance commitments with customers the proposed levels for leakage, water supply interruptions and water quality contacts were acceptable where as the proposals for pollution were seen as unambitious and those for sewer flooding unacceptable.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Future customers are a very important group for this category – and understanding intergenerational fairness could be key.

Are there any insights which contradict the above?

In PR19, there were differences noted between socio-economic groups and future customers – this was more in terms of the pace of ambition with those with lower incomes prioritising affordability while the future customers were prioritising environmental improvements overall.

What do our stakeholders think?

Stakeholders such as CCW want to ensure there is enough support available for those who struggle to pay their bill. There is recognition across key regulatory stakeholders regarding the choice between bill increases to support environmental ambitions and improved service while balancing the current financial concerns of customers.

6. Wider business resilience

Do customers support us investing in improvements to increase the region's resilience to extreme weather now or delay that investment for the future?

New Insights	Source	Score
A focus on **online channels** to engage customers is key to delivering a great experience.	21	11
A focus on **technology** & proactivity on key issues is important to frame customer engagement.	21	11
Focusing on **positive online services** and approaching customer service and being proactive are still key to delivering a good customer experience.	23	11
Good experiences with tech/products also enhance the customers' experience with the brand.	23	12
Many customers struggle with prioritising what is important for short-term vs. long-term investments when it comes to DWMP, as they consider all areas to be of equal importance. As such, some customers would like to see investments across multiple areas, rather than a fixed approach on what are considered the top priorities of today. With uncertain times ahead and the threats posed by climate change, all plans need to be adaptable to ensure money is being invested sensibly in areas where it's most needed at any given time.	40	10
44 % of the participants at the community ambassador events thought to plan and invest now based on the best climate change scenario.	35	6
37% of attendees at the community ambassador events think AW should invest now based on the most extreme climate change scenario (with 36% thinking AW should still invest but on the best-case scenario)	66	6
In the WRE regional synthesis report there was generally low HH awareness of the sense of	121	11

urgency regarding drought resilience. Most customers supported the use of TUBs/NEUBs, but often preferred investment in new infrastructure and demand reduction initiatives as a long-term water resilience strategy. Most customers were happy to accept the reduction of drought measures to 1 in 500 years (by 2039).		🟩

PR19 Key Messages (drawn from the AW PR19 report)

Cybersecurity is a real concern for customers. However, in general, the water industry is **not regarded as high-risk**, compared to other sectors such as banking or government. Customers' concerns about **data security** centre on personal safety (e.g., identity theft). Attacks on the IT systems of Anglian Water assets are less at the forefront. Customers **expect Anglian Water to have a high level of cybersecurity in place that goes beyond the minimum**. They also expect the company to keep anti-virus software and firewalls up to date, ensure customer data is protected through use of encryption/passwords, implement strict data protection policies and protocols for employees, and continually stress test their systems. The new Network and Information Systems (NIS) Directive is regarded positively by most customers. Anglian Water estimates it will cost £33m to respond to the NIS; this is generally seen as a **sound investment**. However, customers want to be reassured that this represents the **evolution of past initiatives**, rather than a measure to deal with under-investment or insufficient planning in the past.

What do the majority of insights suggest?

Customers **struggle to balance** the short-term vs the long-term. There is a desire that AW should be planning for the future. Climate change is an area of concern and is recognized as a threat. The preference seems to be for a balanced approach considering what is needed now and in the future**.**

Looking at wider resilience, cybersecurity is a real concern for customers. However, in general, **the water industry is not regarded as high-risk,** but customers expect a good level of security to **protect their personal data**. There is **support for sound investment** provided it is not used to correct insufficient past investment. Technology and **access to positive online services** are a given for customers and are shown to be key in delivering a good customer experience.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Security experts and futurology experts may have views on where the industry should progress.

Are there any insights which contradict the above?

None.

What do our stakeholders think?

There is a general support for increasing resilience to protect the service the company provides and the wider environment by stakeholders such as the DWI and Environment Agency.

Responsible business

1.Net Zero

Should we be ambitious and reach Net Zero by 2030 or meet the statutory target which is set by 2050?

New Insights	**Source**	**Score**
Customers feel that **reducing the carbon footprint should be essential,** since climate change is a major threat. They feel promises need to be kept, otherwise they're just empty words.	2	8
Future customers rank **reducing the carbon footprint** as second most important priority (in comparison the wider customer base ranks leakage as the second most important priority).	19	14
Generally **reducing the carbon footprint was scored 13th** for spend allocation in the PR24 priorities work.	19	14
44 % of the participants at the community ambassador events thought to plan and invest now based on the best climate change scenario	35	6
In terms of communications 'Reducing CO2 emissions' is by far the most relevant message to the customers - it is seen as the most realistic and tangible goal; it's something they can actually see happening and can measure how successful Anglian Water will be at achieving it. The word deemed least relevant was 'Net Zero'. Customers say this phrase is pretty meaningless to them, it doesn't tell them much about what AW are trying to do, and the words are not clear.	88	9
PR19 Key Messages (drawn from the AW PR19 report)		
Most customers **support Anglian Water's efforts to reduce its own carbon footprint**. However, a smaller footprint is ranked low in order of importance of the 10 outcomes. **Energy neutrality is also ranked as less important** than many of the other water quality and customer satisfaction goals and long-term ambitions (although it is still considered important). Customers want to see more detail about how carbon neutrality ambitions will be met, including some interim targets and milestones. Anglian Water's commitments to a circular economy are also ranked low of its seven water quality and customer satisfaction goals. Some customers find the terminology confusing. When introduced to the company's plans with respect to water foot-printing, some customers feel strongly that the company should already know how much water it uses. However, the company's **draft PR19 plans to reduce carbon emissions from construction projects were well-received**, and targets in this area are regarded as sufficiently stretching. Customers are keen for Anglian Water to **reduce waste from its processes and switch to more sustainable sources of energy**. Evidence suggests there is **very limited awareness of biosolids**, or the company's role in their production. Support for biosolids seems to be mixed. Some research **suggests customers regard production of biosolids as a much more environmentally friendly option** for dealing with waste than incineration, landfill, or dumping at sea, and a more natural way of fertilising land than use of chemical pesticides. Other research suggests customers are **concerned about the use of biosolids** on land. Confidence in, and acceptance of, biosolids centres on the quality and safety of the product. There are some concerns that the privatisation of the market in biosolids may lead to a decline in quality. Customers are increasingly **concerned about plastic waste**, and the potential for this to infiltrate the environment and food chain. However, most do not spontaneously make a connection between the processing of wastewater and microplastics. Learning more about these increases expectations on Anglian Water to protect the water supply. However, in general, customers regard tackling **plastic waste as a shared responsibility** between consumers, industry and government. Available evidence suggests most customers accept transportation of sludge as a 'necessary evil'. While some customers feel strongly that road		

transportation is not the best option, most customers do eventually agree to this, however they are keen for Anglian Water to continue to explore solutions that achieve the **best balance between cost and environmental impact**. Customers are **supportive of Anglian Water's plans to create a 'greener' vehicle fleet**. However even the strongest supporters are mindful of the **impact on customer bills**. As the electric car industry is new, these cars currently have limited range, and there are still few charging points available, some customers advocate trialing new types of vehicles in the first instance, rather than 'jumping on the bandwagon' right away.

What do the majority of insights suggest?

Most of the insight is from PR19, but a more recent PR24 studies confirm similar findings that **customers generally support** Anglian Water's efforts to reduce its own carbon footprint. However, carbon reduction is **low in terms of importance overall** with the PR19 outcomes engagement ranking it 10th and the recent PR24 priorities work ranking it 13th. Energy neutrality is also ranked as less important. Customers are keen for Anglian Water to **reduce waste from its processes** and switch to more sustainable sources of energy, but evidence suggests there is very limited awareness of biosolids and, when explored with customers, there are **some concerns shown regarding using biosolids as fertilisers** on land. Customers are increasingly **concerned about plastic waste** but do generally see this as a shared responsibility. When communicating about its ambitions in this area AW needs to be clear and demonstrate tangible actions.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

The energy sector may have some interesting insights in this area and there may be opportunities for collaboration.

Are there any insights which contradict the above?

Future customers ranked **reducing carbon footprint as the second PR24 priority** for investment, compared to customers more widely, who ranked it 13th.

What do our stakeholders think?

There are no specific stakeholders focused on this area, but the environmental regulators support the water industry position of reaching net zero.

2. Affordability and social tariff

Would customers be prepared for bills to go up, if it meant more vulnerable people were being supported? Or would customers like to see bills go down but that means less customers supported?

New Insights	Source	Score
24% overall would like Anglian Water to **keep bills low** (vs 17% for non-HH).	1	14
Most customers (82%) state they always pay their household bills on time. **Vulnerable customers are slightly more likely to struggle to pay** when due (78%).	1	14
Water needs to be affordable for all and technology is seen as vital to help with all areas.	2	9

Less water usage should generally mean that customers' **bills are reduced**; if customers were to see a reduction in bills this would be indicative of a successful plan.	2	9
Frustration exists when prices go up; perceptions can be that money has been spent unwisely and/or profits are going largely to shareholders.	6	10
The **current state of the economy** is at the forefront of customers' minds, particularly relating to energy, water and general household bills. They see the rise in prices and increase of bills very publicly in the media, so the **possibility of bill increases is not taken lightly.** Lack of financial security and general volatility leaves some feeling that they don't know what the best option is. The result is that many find themselves 'sitting on the fence' and choosing a middle option as a 'happy medium' in terms of environmental ambition.	7	9
There is an insensitivity to modest changes in bills for investments that will improve service levels and reduce the risk of future disruption. There is also a **willingness to pay for investments now to safeguard** water resources and the environment for future generations. However, the scale of any bill increase **must account for the needs of vulnerable and low-income households**, helping to ensure their bills are affordable.	18	13
Affordability is heightened post-COVID-19 - **plans should be fair and affordable** for all. Everyone is worried about rising costs. Inequalities highlighted by the pandemic create a **more 'citizen-focused' mentality - important to protect lower income/poorer households.** However, stakeholders (and some NHH) believe water is (too) cheap and under-valued. **The need to protect the economically vulnerable is undisputed.**	24	13
In terms of financial cost, most customers in this research project would **accept a rise of 10-20% per annum** or £3-9 per month on their bill (note: this was not derived from a robust willingness to pay study so should be used with caution and is only indicative).	25	9
When rating the importance of Anglian Water's activities, the top three areas are: to provide a reliable source of clean water; reducing leaks; and **keeping prices affordable**.	25	9
Any future communications on bill increases or payments will need to be sensitive to the current cost of living crisis (2022) and take into account that whilst not everyone may be classed as a vulnerable customer, **people may be finding themselves in vulnerable situations**.	27	10
Budgeting and striving to get the lowest rates for utilities eases a lot of customers financial pressures when it comes to pre-planning finances. Some customers mentioned that having a **Smart Meter has enabled their water bill to be reduced** as they can easily view their usage.	27	10
Customers are **happy to support vulnerable customers**, but are concerned **that further bill increases might stretch them too far** (£1-2 small increases were preferred)	27	10
As in 2018, customers **are strongly against covering other customers' bad debt**. There is a need to reassure that these customers are **receiving as much support as possible** (e.g. offering concessionary tariffs and flexible payments) before it gets to this stage, and that appropriate measures are taken against people who choose not to pay their bills, rather than can't afford to.	27	10

AW **bills are perceived as reliable**, and customers appreciate the lack of large unexpected rise in costs over the years. In direct comparison to the rest of the utilities, the price for water is perceived as fair, reflecting its necessity as a resource. High quality product and good, seamless service paired with a **fair price**, shape the positive perception of AW.	29	10
Bills should reflect consumption, not financial circumstances and providing relief is seen as the government's responsibility, not AW's. **Temporary payment relief is considered more fair than applying a lower tariff.**	29	10
61% of the customers surveyed in this energy survey reported **they worried about having enough (money) to cover the basic needs** of their household. The figure was significantly more in those on a pre-pay system, 30–64-year olds and females	34	6
77% agree water and **sewerage charges are affordable** (drop for last year 84%)	36	8
24.5% of customers surveyed in the CES mirror survey thought to 'do better' Anglian Water should reduce prices	37	11
75% of customers surveyed **wanted additional support** for vulnerable customers	38	14
52% of customers surveyed are aware of at least one kind of tariff currently offered and 53% are aware that tariffs are funded by cross-subsidies.	67	10
Half of customers don't agree with the proposed £17 subsidy, as they feel almost everyone has been hit hard financially recently and believe that you as a business make enough profit to be able to pay this out of your own pocket. Customers who are only just over the threshold of not being eligible to receive support feel uncomfortable with this amount, as they need all the help they can get but are having to fund others.	67	10
40% would rather contribute less than £17 per year - 20% would be willing to contribute more than £17 per year.	67	10
If AW contribute to social tariff , it can't come at a cost of quality of service. Build trust by being more transparent - telling customers more about what AW do helping those experiencing financial difficulties. Currently, there's a perception that tariffs are funded solely by customers and there's little awareness on how much you put into the pot - it may make customers more open to contributing more if it feels like more of a team effort in which you are taking the lead. To humanise and bring the issue to life may increase willingness to contribute more if they can see where their money is going and what effect it has.	67	10
With future customers when asked how much support we should give customers struggling to pay? they found it hard to give a definitive financial answer but what came out clearly across the groups if that customers struggling to pay should have a reduction in bills and that customers should be charged on what they are able to pay.	68	8
85% of customers feel clear in their understanding of how payments are calculated after reading Anglian Water's explanation although a notable number of customers also feel that the current explanation is overcomplicated and could be shortened to make it easier to digest.	69	8
Regarding the language AW should use 'Financial support' is the preferred option (33%) as it's considered a clear and concise explanation, while also deemed the' friendliest' wording - providing a gentler way of offering support without sounding scary, judgmental or patronizing.	69	8
The most preferred statement (46%) for communication to those who do need help is "we're helping with your outstanding balance - We've added a credit of £XX to your account as part of our scheme to help customers who've had an outstanding balance	69	8

on their account for a while." This statement is perceived as a straightforward explanation of support, while also being considered more gentle and positive.		
When asked about improving CSAT score those providing a rating of 7 or 8 most often stated that they would like to see a reduction in prices or leaks repaired more quickly.	80,81 &82	11
When asked about 'Value for money' in the brand tracker from Feb 2022 to Feb2023 an average of 39% of customers thought the service was value for money.	83	10
The baseline perceptions of Anglian/Hartlepool Water were generally neutral or positive about the social tariff, and participants felt Anglian Water offers good value for money. Awareness of all the social tariff schemes was low, but the majority felt very positive about Anglian Water offering these schemes, particularly LITE/extra LITE and were very supportive of the Priority Services Register.	92	11
There was no awareness amongst participants that customers funded the social tariffs, but there was high acceptability at all three price points, and some were willing to pay up to £24 per year. Low acceptability was due to lack of transparency rather than the price point, which seemed reasonable.	92	11
Overall, advertising/awareness of the tariffs and what Anglian Water does to help support customers was of high importance to participants throughout the depth interviews.	92	11
When considering customer satisfaction, those providing a rating of 7 or 8 most often stated that they would like to see a reduction in prices.	94	10
41% of customers would rather stick with the current contribution (£17). These customers would prefer not to see their bill increase any higher in the current financial climate and feel that any further contributions should come from your side instead. 40% would rather contribute less, 20% would be willing to contribute more than £17 per year - the majority of these customers are willing to round their contributions up to £20 per year, although there's also a small number who'd be happy to contribute between £20-£30 per year.	100	7
When shown different alternatives of how social tariff would work (including one with shareholders contributing some) these do not significantly change customers' opinions on whether they'd be happy to contribute more or less per year, with an average of 62% across all statements having no change to their preference to pay more or less. This is driven by a very strong and overruling perception across the general customer population that it's not their responsibility to cover the increase - it's AW's.	100	
To boost WTP for the social tariff, consider real-life customer examples on how the tariffs have helped individuals. The more customers can relate and empathise with the issue, the more likely they feel they have a stake. Also, consider including portraits/images of individuals to boost emotional connection.	103	7
Customers wanted a clear visual to breakdown how their £12 was being spent. Including statistics, facts and figures will build confidence among customers, knowing that their contributions are being used effectively to help those in water poverty. Consider if customers were to contribute more to include what this would add in tangible terms. For example, X more people in water poverty reached and supported.	103	7
There has been a significant increase in awareness of the social tariff in 2021-22 from 11-17%.	95	8
59% of customers tested thought water bills were affordable – this was significantly higher for Hartlepool customers, higher economic grades and those on a social tariff.	108	12
27% are aware of the services available to help them with their bills.	108	12

When testing an additional extension to the social tariff of between £2-10, the willingness to pay among customers decreases as the additional charges increase. While nearly 4 out of 5 individuals found the lowest bill amount acceptable, this acceptance rate dropped to 3 out of 5 (61%) for the highest additional bill amount. Across all groups, the levels of acceptability for different sets of additional bill amounts remained consistent.		🟩

PR19 Key Messages (drawn from the AW PR19 report)

Although some customers are very focused on budgeting and saving, **most feel their water bills are value for money, affordable and fair**. Hartlepool Water customers are particularly satisfied with value for money. Among Anglian Water customers, **satisfaction with value for money of both water and sewerage services has been increasing** over the past few years, and in recent data the company also performs strongly on affordability and fairness of charges, compared to other combined companies. Although most customers say they **rarely or never experience difficulty** in paying their water bill, this varies by customer segment. Unreliable income, unexpectedly high bills, and deficits that accrue on accounts when direct debits are not updated create difficulties for customers, especially those in vulnerable situations. However, even customers in vulnerable situations are generally more focused on other utility bills. **Most customers of Anglian Water and Hartlepool Water say they would contact their company if they were worried** about being able to pay their bill, however the proportion saying this has declined for both companies over the past few years. **Water is regarded as a fairly low risk area in terms of the consequences of non-payment**. There is a perception that Anglian Water would be lenient with customers who can't pay and work with them to find an appropriate solution. 'Customer Expectations and Affordability' was **judged to be the most important of Anglian Water's six major challenges**. 'Fair Charges' was also ranked highly of the 10 outcomes. On average, research **suggests householders are willing to pay an additional £19-£27** and businesses 8%-9% a year for a defined set of improvements (or £29-£35 and 11%- 13% excluding zero protest votes). The key reasons customers give for supporting a set of service improvements is that they offer value for money and focus on the most pertinent issues. Improvements in water services appear to be more important than improvements to the waste service in shaping customer support for a package of improvements. Those customers who support status quo options are largely motivated by satisfaction with current service levels or concerns about affordability. **Household customers' willingness to pay for a package of improvements appears to vary by income/socio-economic grade.** Willingness to pay among Hartlepool Water customers is largely consistent with overall results. Customers generally support going beyond minimum levels of investment to protect water supplies for the future. They also generally support investing in and paying for improvements earlier rather than later. However, some customers are reluctant to pay more themselves to protect future customers; **there is evidence of differences in opinion across customer groups and segments** in this regard. Customers generally **prefer bills to change steadily, and to avoid sudden increases**. Most customers support in-period rather than end-of period bill changes, until they find out about how performance is measured and reported, when they tend to change their minds. Most evidence suggests customers understand that Anglian Water's performance can be affected by factors outside of its control and there is some evidence that they support buffer zones and caps on penalties and rewards for performance. There is support for the additional leakage charge for enhanced performance, as long as it remains at the £4 mark. Overall, Anglian Water's **draft PR19 plan was regarded as affordable**, and ratings of affordability increase when customers are better informed. There is **very limited awareness of additional (financial) support for those who struggle to pay**, however awareness of the 'Watersure' tariff has been increasing among customers of both companies over the past few years. Available evidence suggests most customers feel that Anglian Water did a good job of understanding their circumstances and needs when they applied for additional support. While there is strong support for Anglian Water's initiatives in relation to vulnerability, **customers draw the line at providing financial support to others that has a large impact on their own bill**. There are differences between customer segments in willingness to pay more to subsidise others. It is important to customers for Anglian Water to be able to **distinguish between those customers that 'can't pay' and those that 'won't pay'**. Some customers feel strongly that billing support is a responsibility of the government rather than water companies. Some feel that support should come from Anglian Water's profits, not customer bills. As highlighted above, most customers of Anglian Water and Hartlepool Water say they would contact their company if they were worried about being able to pay their bill. However, the proportion saying this has declined for both companies over the past few years.

What do the majority of insights suggest?

Views do seem to have shifted from PR19 – customers are spontaneously mentioning the effects post-COVID and the 'cost of living crisis', which are likely to be influencing their views. There is a core desire from customers for bills to be **fair and affordable and some see that smart metering could be helpful in this**. There is **frustration when bills go up** and real concern for those who are financially vulnerable with a more **'citizen-focused' mentality**, meaning it is important to **protect those on lower incomes**. In one survey 75% of customers supported additional help for those vulnerable customers. Customers are **strongly against covering other customers' bad debt** so there is a need to reassure that these customers are receiving as much support as possible to stop them getting to that situation. When ranking priorities, **supporting those most vulnerable** ranks as number 7 (out of 8). The £17 cross subsidy for the social tariff gets support from about half the customers tested in one study and 41% in another - the **remainder don't agree** as they feel almost everyone has been hit hard financially recently and believe that AW as a business makes enough profit to be able to pay this out of their own pocket – there are, however, some (20% in one study) who would pay more. Customers who are only just over the threshold of not being eligible to receive support feel uncomfortable with this amount, as they need all the help they can get, but are having to fund others. Transparency over how the current subsidy is spent is important to continue to gain support from customers. Recent testing in the summer of 2023 showed a high level of support for a small increase in the cross subsidy (£2) but, as tested values increased to £10, a drop down to 61% acceptance was seen.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Vulnerable customers and the organisations that represent them such as Consumer Council for Water (CCW), Citizens Advice and any debt charities.

Are there any insights which contradict the above?

Some stakeholders (and some NHH) believe water is (too) cheap and under-valued. Some customers feel strongly that billing support is a **responsibility of government** rather than water companies. Some feel that support should come from **Anglian Water's profits**, not customer bills. Some of the PR24 research suggests customers should accept a rise of 10-20% per annum or £3-9 per month on their bill but caution needs to be applied to the values quoted. Other sources do suggest **insensitivity to modest changes in bills** for investments.

What do our stakeholders think?

There is a widespread support from stakeholders for a social tariff and CCW are still promoting the need for a national version. There's increasing recognition from stakeholders that significant investment is needed next AMP and beyond, so the focus has moved from keeping bills as low as possible, to investing whilst protecting the most vulnerable.

AW get limited incoming stakeholder contact on this but do get some follow up when they send proactive comms on this topic. Generally, stakeholders are positive about the support AW has in place, but there are still calls across some stakeholder groups for a single social tariff for the industry nationally. This view isn't shared by Ministers though, hence why Defra isn't taking the idea forward.

3. Community support - priority services for vulnerable customers

Is the support that's currently being offered to customers who are struggling to pay sufficient, or should we be doing more?

New Insights	Source	Score
As expected among non-bill payers, there is **a large proportion of respondents (41%) who are unsure about their Priority Services Register (PSR) type status.**	1	13
Although vulnerable customers are slightly more likely to be on the Priority Services Register - or to be eligible - **the majority of customers are not part of it.**	1	13
Vulnerable customers who were part of this study placed providing support/services for customers who are in vulnerable circumstances as joint fourth priority (along with lead replacement) compared to sixth across the wider customer base.	19	13
Supporting vulnerable customers' needs to be a priority and visible to the wider community to impact overall customer satisfaction.	21	10
Vulnerable customer support is important – even beyond the context of the impacts post-COVID. In the short-term, continuing to communicate clearly regarding the implications post-COVID-19, support is important, but, in the longer-term, the need to engage with vulnerable customers to **provide adequate support**, while ensuring this is clearly visible to the wider customer community to help maximise C-MeX impact.	21	10
Awareness of WaterSure tariff was 17% (significantly higher than Wascs overall average), awareness of priority services offering 53% (significantly higher than previous year	36	8
For general support, customers with disability wanted choices about how to contact AW in a way that was convenient and accessible for them. People mentioned preferring: •A text-based support option (chat assistants, Facebook Messenger, and WhatsApp) •Clear information about different ways to contact AW •Collecting general feedback about services and support	55	13
For hearing about leak status changes and responses, people with disabilities requested: •Text messages for short updates (with an option to reply if needed being nice) •Additional details or wider context via email •A phone call (but not as a sole means as inaccessible to some) •An option for verification (against scams)	55	13

If there was announcement about moving to meters, disabled customers prefer: •written announcements that they could revisit (by email and post) •links to sources with detailed information and information included with the letter •emails or live chat for additional questions (with customer service staff knowing they are disabled) •notice at least few months in advance •a personal account notification to confirm (for verification) •added personalised comparison information about cost	55	
To boost meter confidence and trust for disabled customers by: •Providing clear but detailed, accessible information with concrete examples of metered costs so they can compare •Considering disabled people's needs and concerns when making any announcement about moving to meters •Adding notifications about meter readings done by Anglian Water •Providing information about ways to save water •Providing information about water saving equipment and considering offering them as incentives •Highlighting the trial period option and explicit conditions attached	55	13
Improve disabled customers' experience of support options by: Broadening eligibility criteria for special tariffs: •Extend eligible conditions to include all disabled people, using the social model (focus on needs rather than specific diagnoses) •Include non-mean-tested benefits (for example, DLA, PIP and the AFIP) Highlighting differences between the Extra Care Support options and PSR •Signposting between the two more actively •Including clear but detailed and accessible information about support options with all communications	55	13
Reduce stress around needing support for disabled customers by: •Making their PSR status more visible, and inform then about what it includes •Allowing additional, more personalised details of the support needed as part of PSR registration •Reassuring those on special tariffs that the move to smart meters will not affect their bills •Making people aware of alternative ways of completing the Extra Care Assessment, minimising the need to disclose private details •Posting clear and simple guidelines for leak situations, including easy contact methods	55	13
Regarding WaterSure, people often felt like their condition will not be included and they would not be eligible despite their needs, if they did not have the 'right' diagnosis. This raised a certain frustration for some, who felt misunderstood and wished such options were based on a more in-depth, nuanced understanding of people's diverse needs and condition complexity	55	13
66% of attendees at the ambassador community events had not heard of the PSR	66	6
There has been a significant increase in awareness of PSR services in 2021-22 from 42% to 53%.	95	8
A majority of billpayers are struggling at times with household bills. With only one in four reporting that they never struggle with bills. Some groups are particularly at risk of struggling financially. The research finds a high proportion of younger people facing	116	9

difficulties, those with disabilities or long-term health conditions, and people who rent rather than own their own home.		
Awareness of support for water bills has remained fairly static. While the past year has seen much public discussion on cost-of-living challenges, this has not been matched by an increase in awareness of financial support being available for those who need it.	116	9

PR19 Key Messages (drawn from the AW PR19 report)

Research suggests a **need to 'reframe' vulnerability and focus instead on customers in vulnerable situations**. The severity of the challenges customers face, the nature of their support networks, their financial literacy and confidence, and their emotional responses all shape experiences of vulnerability. **Fear or actual experience of being patronised or stigmatised is a key barrier to seeking help**. However, most customers in these situations **report positive experiences** of dealing with the company. **Awareness** of additional services and support is still **fairly limited** but has been increasing among customers of both Anglian Water and Hartlepool Water in recent years. **Increasing awareness** still further is regarded as the most important thing the company can do to improve the situation for these customers, however the channels for doing this will require careful thought to ensure they are genuinely accessible. There is **strong support for Anglian Water working in partnership with other agencies** to identify customers with additional needs and provide support to them, however there are some concerns about data sharing. Some recent research suggests (muted) support for the idea of an independent board to champion the needs and interests of 'vulnerable' customers, however, customers want reassurance that panel members will be independent, and this will not be a 'tick-box' exercise. There is support for Anglian Water's PR19 plans and proposed bespoke performance commitment on vulnerable customers. However, support for a measure based on the number of people on the priority register is more mixed (some customers feel that any number would be arbitrary). **Some customers feel the company should not be incentivised for providing the kind of service to vulnerable customers they should be providing anyway**. Most customers feel the company's targets in this area are sufficiently stretching, although household customers are less sure. **The majority of customers seem to be willing to pay a little more to support vulnerable customers in future**, however there **are limits** to this, and some feel strongly it is a job for government not the water company. Customers (including those in vulnerable situations) want to be sure that those benefiting from support actually need it and are not 'playing the system'.

What do the majority of insights suggest?

There is still a **lack of awareness** around the support services AW provide to customers in vulnerable circumstances, although the most recent CCW survey has shown a marked increase in awareness from 42%-53%, and this seems fairly static, even though affordability issues have been much more publicly discussed on main-stream media. Research suggests a **need to 'reframe' vulnerability and focus instead on customers in vulnerable situations**. Aligning with research conducted during PR19, recent PR24 engagement has **highlighted the importance of such services** and the visibility of those impacts overall regarding customer satisfaction. Vulnerable customers placed these services as the joint fourth priority for them in PR24 (compared to the wider customer view placing them as the sixth priority regarding spending allocation). There is some **willingness to pay to provide additional help, but this has a limit**. Recent research and wider stakeholder insight (from Scope) suggest the **awareness of PSR services is low** and even if aware access is difficult. There are concerns raised that the **eligibility criteria for access to special tariffs is restrictive** and needs to be widened to include non-mean tested benefits such as DLA or PIP).

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Vulnerable customers themselves have strong views on this area and generally give it a higher priority.

Are there any insights which contradict the above?
There is some conflict regarding who pays for this support – whether company or government - and concerns that any 'help' goes to those who genuinely need it, rather than people 'playing the system'.
What do our stakeholders think?
Scope's research (Disability Price Tag, 2019) has shown that disabled households face additional costs of £583 per month on average, and 1 in 5 disabled people face extra costs of more than £1,000 per month. A survey commissioned by Scope in January of 2022 has found that among disabled people whose living costs had increased over the past 3 months, half (48%) said rising prices had a worsening effect on their long-standing health condition, with a similar proportion (51%) said their mental health had worsened as a result. Not all disabled people are eligible to receive government support in the form of cost-of-living payments, and the majority of those who are say the payments are not enough to cover their essentials – many disabled households are currently in debt to either their energy or water supplier, or both (Scope, 2022). Regarding PSR 55% reported they are currently registered in on the PSR, while 43% said they are not registered. Strikingly, out of those who were not registered, the vast majority (73%) said they have never heard of the PSR before, which indicates a critical need around raising awareness. The most commonly reported barrier to PSR was complicated, unclear use of language or terms (41%), followed by display issues (13%), and incompatibility with a screen reader (7%).

4. Community support - CSR

Do customers want to see us invest in projects that create improvements to the natural environment over and above those that don't?

New Insights	**Source**	**Score**
There is a desire for more **outdoor natural spaces** to be made available, rather than closed off to the public.	6	10
However, consumers want AW to prioritise the core business activities (which includes protection of the environment, managing flood risk and drought resilience) over the '**added value**' elements (boosting the local economy, consulting customers and creating public amenities, etc.).	9	13
Education and communication are a common theme in the research, and more is needed in this area. It is seen to be a **'glaring' omission** on the WReN metrics.	10	9
Positioning Anglian Water as a brand at the **forefront of sustainability** and serving the wider community (CSR) are crucial to elevate the role of the brand.	21	12
Sustainability and being a 'good company' are **growing in importance for C-MeX** and are areas that can be used to build trust.	23	13

There is **limited understanding of the phrase 'Public Value'** with customers and can been seen as 'CSR washing'. There is a need to be mindful about using the 'Public Value' phrase without detailed explanation **'Added Value' is an easier phrase** to understand and is seen as delivering 'Over and Above' the core project objectives.	30,52,54,54	15
In both the qualitative and quantitative work, **environmental project additions (to large infrastructure schemes) were valued highly** – there was a high emotional resonance with these additions and the narrative of supporting wildlife/new wetlands/habitats chimes with customers across water companies.	30,52,54,54	15
Public value in the water space is expected to fulfil five specific criteria: **local community** centric; **long term** justifiable value, **sustainable**, **water relevant**, **low maintenance**.	30,52,54,54	15
Delivering **public value is felt to have a strong PR and communication benefit** both to secure buy in to the infrastructure project (shorter term) and to elevate/increase relevance of water company brands (longer term).	30,52,54,54	15
The top-three most highly valued project additions to large infrastructure by households were:' **Specialist habitats created for wildlife**' (£3.87 annually, on average)'**New wetland** area' (£3.24 annually, on average) 'Space provided for **sustainable agriculture**' (£2.61 annually, on average)	30,52,54,54	15
The biggest variation in view on added value in the qualitative work was by infrastructure project type. This is consistent with the quantitative work where valuations of **project additions differ considerably across different types of sites and by distance**, while the extent of variation across different companies is small.	30,52,54,54	15
In the quantitative work, overall, project additions at water treatment works were valued most highly, followed by reservoirs, canals, and pipelines. This could be due to reservoirs/canals being naturally more positive/pleasant however qualitatively, people felt that the social project additions at water treatment works would be less valuable as they would be unlikely to want to visit but **environmental and economic benefits were supported.**	30,52,54,54	15
The WTP for a 'package' of project additions was lower than the sum over individual project additions, indicating that that **capping may be needed** for individual project additions to ensure that total WTP is not exceeded.	30,52,54,54	15
73 % supported developing nature based solutions, such as wetlands, to mitigate against the risk of climate change and pollution as opposed to grey solutions e.g. big, concrete infrastructure.	38	14
60% supported improving access for customers to connect with the natural environment e.g. access to reservoirs, nature reserves.	38	14
Generally, customers are impressed by the environmental stance that Anglian Water are taking.	87	9
Thinking of all the above, customers would like to see some comparison between the actions that Anglian Water takes compared to other companies. Context is key when helping customers to understand, whether it's Anglian Water showing what they're doing compare to others or showing what they are doing now compared to 5 years ago.	87	9
PR19 Key Messages (drawn from the AW PR19 report)		

Although '**Caring for Communities' is not ranked very highly** in terms of Anglian Water's ten outcomes, it is important to customers that the company cares about the communities it serves. Some evidence suggests this is becoming **increasingly important** and is especially critical for customers in Hartlepool. Evidence suggests most customers agree that Anglian Water cares about the communities it serves, although agreement appears to vary by customer group. **Awareness of Anglian Water's activities in the environment and community remains low**; learning about these boosts positive perceptions of the company. Further communication of the company's activities is regarded as the key to enhancing perceptions still further. Recent research suggests that customer views about whether the company **'cares for the environment'** and is **'socially responsible' are key** to overall judgements about whether it cares about the communities it serves. Available evidence suggests that **most customers are supportive of Anglian Water's social capital** and social impact aim, however the term 'social capital' does not resonate. There is most support for initiatives that are local in their focus and linked to Anglian Water's core purpose. **Some customers are much more sceptical about these initiatives; they view them as beyond the water company's remit and as a 'charitable donation' that customers can't opt out of**. Awareness of the company's schools programme remains low. However, customers are strongly supportive of this activity. Customers feel this is important in shaping a generation of future customers who will be more focused on water conservation. There is interest in expanding the schools programme in future. **Most customers enjoy spending leisure time in the countryside; however, enjoyment appears to vary by customer group**. Customers like the fact that Anglian Water offers **recreational opportunities at water parks and nature reserves**, whether they use them or not. However, the number of customers visiting these facilities on a frequent basis remains relatively low. More advertising and promotion are the key actions that Anglian Water can take to address this. Being able to access the sites, including by public transport, is an important theme for vulnerable customers. PR19 research suggests that **customers have higher willingness to pay for improvements to ecological rather than recreational water quality**. However, being a recreational user of rivers has a positive impact on willingness to pay for improvements in recreational water quality. In terms of the impact of the company on the community, customers have some complaints about leaks in public places, incidences of bad smells from sewer treatment works, and road closures and traffic disruption while work takes place. It is especially **frustrating to customers if road closures go on for weeks**, without a clear end-date, and with little visibility of work actually taking place. Improved communication would ease these frustrations. However, some recent research suggests that the **per incident impact of roadworks on customer wellbeing is many times less than that caused by flooding**. Customers regard the company's role as a local employer as one of the most important, positive contributions it can make. Customers of Hartlepool Water are especially positive about this aspect of the company's activities.

What do the majority of insights suggest?

AW being at the **forefront of sustainability** and being a **'good company'** in customers' eyes **drives both the brand and customer satisfaction**. There is a **wide desire for outdoor spaces** and the value of recreation and open areas on both physical and mental wellbeing. However, added benefits are **not seen as a preference** ahead of the 'core' services. **Public value** in the water space is expected to fulfil five specific criteria: **local community** centric; **long term** justifiable value, **sustainable**, **water relevant**, **low maintenance**. PR24 research showed customers have a **higher willingness to pay for improvements to ecology** rather than recreation which aligns with PR19 engagement with 'specialist habitats created for wildlife' (£3.87 annually, on average)'new wetland area' (£3.24 annually, on average) 'space provided for sustainable agriculture' (£2.61 annually, on average) scoring the highest. 73% of customers support nature-based solutions to mitigate climate change. Views regarding types of added value project additions **differ considerably across different types of sites and by distance** of the site to the customer and although 'core' services are seen as a priority we see strong support for improving access to help customers connect with the natural environment.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)
Local environmental NGOs and Natural England have specific views in this area.
Are there any insights which contradict the above?
Some customers are much more **sceptical** about these initiatives; they view them as beyond the water company's remit and as a 'charitable donation that customers can't opt out of'.
What do our stakeholders think?
Two areas of Natural England's focus are: a well-managed Nature Recovery Network across land, water and sea, which creates and protects resilient ecosystems rich in wildlife and natural beauty, enjoyed by people and widely benefiting society. And, people connected to the natural environment for their own and society's wellbeing, enjoyment and prosperity.

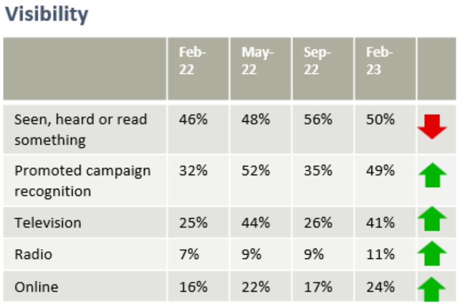
Delighted customers

1. Education

Do customers have all the knowledge they need to provide effective feedback for Anglian Water, particularly in areas that are more technical?

New Insights	**Source**	**Score**
Customers valued education (related to the introduction of new major infrastructure as £0.90).	30,52,54,54	13
At the moment customers are aware that they don't have all the knowledge to provide effective feedback for Anglian Water, particularly in areas that are more technical. This makes it difficult for them to make decisions or advise on short vs long term decisions as they lack expertise or knowledge on certain issues (e.g. the impact of Net Zero).	42	7
Having a greater community presence and spreading the word about Anglian Water more (e.g., through emails, newsletters, social media etc.) could help increase the baseline knowledge of Anglian Water among customers. Future research in the Knowledge Hub could explore appetites for knowledge: what do customers want and need to know and where do they want to be able to go to find out this information?	33	7
Many customers feel lacking in their water saving knowledge and support and are open to receiving this from Anglian Water. Educating customers on ways they can reduce their own usage, as well as giving them the ability to track their own usage through the installation of smart meters, is considered an important step to customers in the preservation of water supplies.	33	7
Overall, the statements tested ('Safely storing rain', 'Investing in our region', 'Protecting the future of water' and '100% electricity, 0% emissions') were successful at driving perceptions that Anglian Water are safeguarding and future-proofing water/water recycling resources and investing in communities and the environment across the region. Less feel convinced that Anglian Water is working sustainably. However, there was a perceived lack of authenticity across these posts. This could be boosted with more context and detail and treat the conversation as a story - take customers on a journey keeping them up to date on what's happening in each stream throughout the year - social media highlight functions could be leveraged.	70	8
On the 'help if you're metered' webpage - the majority feel positive about the page. On first impression, it seems clear, concise, and informative; it tells them everything that they want and need to know. Things that are clear and easy: the coloured boxes at the bottom of the web page puts everything into categories and is a useful way of navigating round the page for customers. The example provided also adds clarity to the explanation, it helps customers to have a clear scenario example of how the charges are calculated. What they don't like: A few report that the page is a little text heavy, making it feel overwhelming and hard to digest, particularly when it comes to the example 'John's bill' calculation. Use of an infographic or short animated video here may make the information easier to digest, whilst also reducing the amount of text on the page.	70	8

On the half re social tariff page - what they like: most customers like what they see on the page; it contains comprehensive and helpful information, which is presented in a clear layout with well-defined sections. They also appreciate that the page is well-equipped with links to further information should you want or need to find out more. Things that are clear and easy: similarly, to those on a meter, the blue boxes at the bottom of the screen aid in the clarity of how customers can navigate the page, e.g. they can easily sign up to the priority services register. What they don't like: one reports that they feel the page is a little text-dense, particularly in the intro section.	70	7 (v small sample)
On ‘help if you are unmetered’ webpage - what they like: the customers that like the page feel that the content is clearly set out and easy to understand. Things that are clear and easy: the blue hyperlink boxes are well-received as a clear and easy way to navigate to the specific information you are looking for. What they don't like: two customers feel the page is too text-heavy at the top, making things feel unclear.	70	7 (v small sample)
Across webpages - customers want to see improved accessibility - thinking about those in vulnerable groups, such as older ages and those who don't have access to the internet, customers feel that the pages should come in a printable format with contact details readily and clearly available on every page (primarily a relevant phone number, but also a link to email, socials and a live would be well received). Additionally, some want to see Anglian water catering for those with eyesight/hearing impairments and those whose first language isn't English, with translation features.	70	8
Most customers feel positive about Anglian Water and see you as a trustworthy, respectful and reliable utility company. Based on experience, customers trust that Anglian Water will maintain a clean water supply and keep leaks at a minimum. Additionally, Anglian Water's regular DM/mail communication and social media presence leads many to feel that you are easy to communicate with and are customer focused. On the other hand, and for a minority of customers, there is some feeling of resentment towards Anglian Water, which is driven by feelings of frustration, anger, disappointment and sadness. These tend to come from negative personal experiences from dealing with Anglian Water, e.g, waiting a long time for leaks to be fixed, poor customer service experiences or lack of support given from Anglian Water when customers have sought financial help in the past. Additionally, the recent news about sewage disposal has had a substantial negative impact on general brand perceptions.	71	8
Spring gardening email was full of great advice and freebies, the email is very well-received by a majority of customers, across the board. Customers feel that the information in this email is sound advice, with the majority pleased to learn about gardening in a friendly, digestible way. Many are pleased to see the initiative from Anglian Water, positioning AW as a caring company who are willing to spend the time educating their customers. The free gardening kit is a big draw, especially to those who may be new to gardening, as it gives them a clear starting point without investment. The minimal negative views come from those on either end of the spectrum; those who don’t feel that this is relevant to them as they don’t have a garden or aren’t interested in gardening. With only a few keen gardeners and finding the email a little patronising due to already knowing the information.	73	6
Any correspondence related to drought shouldn’t shy away from the hard truths, it feels much clearer to customers when they are aware of the reality of how serious	41	9

<table>
<tr><td>droughts are as well as how close we are to having a drought. The use of facts, figures and diagrams all aid in helping customers process the severity of drought.</td><td></td><td></td></tr>
<tr><td>Customers are much more likely to take notice of any drought communications if they are localised and mention specific places within the region. This sense of connection makes the general message of any communications more effective and appealing.</td><td>41</td><td>9</td></tr>
<tr><td>From the pulse surveys (CSAT tracker) across the November to February, period the largest percentages who had seen or heard something positive had seen an AW advert. The largest percentages seeing something negative had heard about leaks or sewage/pollution.</td><td>80,81 &82</td><td>10</td></tr>
<tr><td>Dashboard from brand tracker re visibility

Visibility
<table>
<tr><th></th><th>Feb-22</th><th>May-22</th><th>Sep-22</th><th>Feb-23</th><th></th></tr>
<tr><td>Seen, heard or read something</td><td>46%</td><td>48%</td><td>56%</td><td>50%</td><td>⬇</td></tr>
<tr><td>Promoted campaign recognition</td><td>32%</td><td>52%</td><td>35%</td><td>49%</td><td>⬆</td></tr>
<tr><td>Television</td><td>25%</td><td>44%</td><td>26%</td><td>41%</td><td>⬆</td></tr>
<tr><td>Radio</td><td>7%</td><td>9%</td><td>9%</td><td>11%</td><td>⬆</td></tr>
<tr><td>Online</td><td>16%</td><td>22%</td><td>17%</td><td>24%</td><td>⬆</td></tr>
</table></td><td>83</td><td>11</td></tr>
<tr><td>When reviewing the signage to get customers to report, customers feel like the yellow sign does come across clearly and is encouraging enough to make customers call and report pollution incidents (and importantly what to be looking out for!).
The directive bullet points are a key factor of the sign providing information and instruction in a clear and concise manner. By increasing the size of this key area and decreasing the logo size, customers would be able to take in the information more quickly and easily –particularly if they're driving.
Increased contact options (including email and social media) would be an easy way to encourage more customers to make reports and specifying that they won't be charged will help put their mind at ease.</td><td>84</td><td>8</td></tr>
</table>

PR19 Key Messages (drawn from the AW PR19 report)

A **range of channels and approaches are needed** to engage customers. Engagement needs to feel relevant, be easy for customers, and be tailored to the interests and concerns of different customer segments. Some customers feel Anglian Water's outcomes and goals are vaguely worded and aspirational, and want more detail on specific plans, targets and milestones. However, feedback suggests **customers have enjoyed taking part in research and engagement** activities and have found them interesting and informative. There is evidence that these activities have raised the profile and reputation of the company and have also changed customer attitudes on the substantive issues. **Customers are keen to know what difference their feedback has** already had and will have on company's plans.

Awareness of the **company's schools programme remains low**. However, customers are strongly supportive of this activity. Customers feel this is **important in shaping a generation of future customers** who will be more focused on water conservation. There is interest in expanding the schools programme in future. Customers regard the company's role as a **local employer** as one of the most important, positive contributions it can make. Customers of Hartlepool Water are especially positive about this aspect of the company's activities.

What do the majority of insights suggest?

Customers do seem to value the need to educate, and they especially highlight when discussing more 'technical' topics they feel uninformed about. This is also apparent when discussing water saving and customers highlight the need to provide information and feedback on usage as well as increasing a community presence to help 'spread the word' more. There is a desire for a clear balance of information – not too technical but enough to

keep customers informed, using simple language that relates directly to them. There are some issues also raised regarding the accessibility of materials.
Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)
Engagement with schools and apprenticeship organisations may provide insights for this area.
Are there any insights which contradict the above?
None.
What do our stakeholders think?
No thoughts specific to stakeholders.

2. Working with retailers and developers

Are we supporting the retail and house building markets as best we can?

New Insights	Source	Score
Retailers have key concerns with the current metering arrangements: •Poor quality consumption data -NHH consumption data is unavailable or incorrect. •Standards, cost and availability -across different Wholesalers there are different standards and arrangements -this can impact on the availability and consistency of information. •Wholesalers can be slow to install, maintain or replace meters. Not all NHH properties are metered.	28	7
Retailers are supportive of both R-MeX and B-MeX as common PCs in the price control as they believe this will **improve their customer service** timeliness and quality of responses so that household and non-household customers complaints are dealt with equally.	28	7
Retailers **are supportive of smart metering** as they feel it will be critical to the delivery of greater water efficiency.	28	7
Retailers rate the overall service they receive from Anglian Water as 7.62 out of 10 – ranking Anglian Water 9th out of the 15 companies engaged	44	9
Escalations/complaints resolution and improved communication are key areas named for improvement.	44	9
89% of customers agreed that if a sustainable surface water discharge is used, then the 2023-2024 Sewerage Infrastructure charge should be reduced by 50%. No objections were made by any customer group to this proposal. Customers who had alternative solutions noted the use of planning legislation to support the use of sustainable discharge methods at brownfield developments. It was also noted that an equivalent incentive could apply at greenfield projects where sustainable surface water discharge methods are used.	56	8
Most customers recognised there is a need to be more environmentally aware throughout the development lifecycle. 71% of customers referred to utilising a credit incentive at projects where environmental protection strategies are implemented. For	56	8

example, the implementation of water efficiency fittings and water recycling systems. Several Commercial Developers suggested alternative options to support environmental protection such as the adoption of SUD features and reduction in Infrastructure Charging where protective measures are implemented. One Homeowner customer recommended the reduction of carbon emissions by reducing the number of face-to-face project visits within journeys.		
81% of customers believe that financial issues will impact anticipated build programmes. One homeowner customer has re-considered their planned home improvement work. Tender and contractor availability was noted as a limiting factor by Building Enablers. One Commercial Developer suggested issues would mostly impact short term planning with a more optimistic outlook for the longer term.	56	8
Across all customer groups, cost certainty and reflective costing models bespoke to customer work were considered most important to support project delivery. Several customers mentioned the role Anglian Water can play in supporting effective development, referencing nutrient neutrality.	56	8
Regarding communication preferences 68% of all respondents noted that an electronic or mailed newsletter was their preferred way to stay in touch throughout the year. This was the preferred option across all customer groups although some Commercial Developer and NAV customer groups also stated a preference for face to face and virtual forums.	56	8
58% of respondents preferred quarterly engagement activities, with some customer groups preferring informal monthly communications with more formal quarterly virtual or in person engagement.	56	8
Awareness of the open market has been tracked since 2017 and has always been strongly linked to organisation size: the market is much more likely to be benefitting larger businesses (and larger water users). However, the most recent data indicates that awareness could be falling back. At a total level, awareness has plateaued since the 2020 pandemic year; and the disparity in awareness between the largest and smallest companies is narrowing – driven by a drop in awareness of larger businesses.	57	11
Market activity (a broad definition from consideration to actually switching) has increased recently to 9.9% which is back to pre-pandemic levels. With similar patterns to awareness, activity varies by region, company size and recency of being a business water customer but again, there is no clear evidence on what is driving differences. Actual switching and renegotiating has increased slightly though this is a trend to watch as the uplift is not statistically significant.	57	11
The evidence is positive in terms of ease of finding information and satisfaction with switching, suggesting that once business customers engage, the process and outcomes are mainly good.	57	11
The evidence review has identified where there is need for improvement: • Building awareness of the market in segments and regions where awareness is poorest – and communicating the benefits of engaging. What is the market strategy to build awareness? • Identifying why some regions / sectors achieve higher market engagement than others • Improving billing service (as this is the biggest service disappointment) with improved transparency, simplicity, and accuracy • Identifying the root of market frictions at switching e.g., prohibitive penalties and automatic rollover (or improve customer understanding of what they are signing up for)	57	11

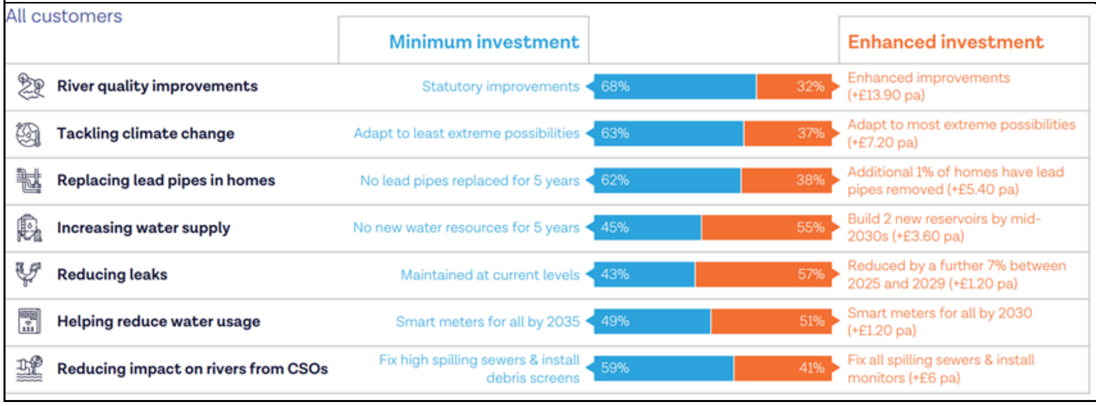
• Improvements around retailer service levels generally – and data specifically. Improving customer understanding of retailer/wholesaler responsibilities and who to contact, introducing smart meters. • Fundamental issue for the market is low engagement with water bills and perceived cost benefits are very marginal. SMEs need a new proposition (a 2-5% cost incentive is not enough alone) – and what is the role of TPIs to create momentum?		
AW was 10th out of the 15 companies in terms of overall service – with communication and system access/ usability being areas highlighted for improvement.	119	7
PR19 Key Messages (drawn from the AW PR19 report)		
No specific insight.		
What do the majority of insights suggest?		
Retailers want to see an improved customer service for their customers in terms of timeliness and quality of response. They are generally concerned about the current metering arrangements as the data that is generated is poor quality and across different wholesalers inconsistent. They therefore support a more to smart metering and see this as major enabler of water efficiency. Anglian Water were ranked 9th best company in a survey conducted by MOSL with the escalations/ complaints process and communication cited as key areas for improvement. Awareness of the open market has been tracked since 2017 and has always been strongly linked to organisation size: the market is much more likely to be benefiting larger businesses (and larger water users). However, the most recent data indicates that awareness could be falling back. 89% of customers agreed that if a sustainable surface water discharge is used, then the 2023-2024 Sewerage Infrastructure charge should be reduced by 50%. No objections were made by any customer group to this proposal.		
Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)		
Retailers themselves and commercial and domestic house builders.		
Are there any insights which contradict the above?		
None.		
What do our stakeholders think?		
See PR14 report from MOSL evidence above.		

3. Asset Health

Should we make all the proposed improvements needed to maintain our assets and address future challenges irrespective of the cost on customer bills, or only target those issues that have the greatest impact on customers?

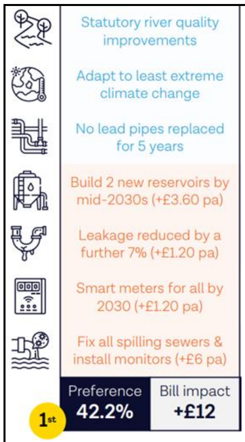
New Insights	Source	Score
Half of customers think water companies put the interest of shareholders/owners first and the most selected phrase to describe them is 'profit-first'. People are now more likely to disagree that their water company acts in the interests of customers, their local area/community or the environment than when asked this in late 2021. Those who think	62	13

their water company is 'profit-first' are less likely to trust their water company to meet its key responsibilities (e.g. delivering a reliable service).		
Continuing to supply high quality drinking water was the most important priority by far now and in the future with all customers	19	15
Leakage was seen as the second priority and despite the high cost replacing lead pipes was seen as much a priority as leakage	19	15
Improving river water quality also featured well above average in the prioritisation exercise.	19	15
Increased resilience to drought is important in the absence of cost – but the high cost of addressing is a barrier for customers.	19	15
Nature-based solutions, increase in the resilience to flooding and additional support for customers all rank highly with little difference in priorities between short-term and long-term.	19	15
In this nationally conducted research areas such as water supply interruptions, appearance of water and flooding all were seen as high priorities along with speed of response when things go wrong. Areas such as leakage, pollution, biodiversity, and affordability were given a medium priority while carbon, drought (including reducing TUBs and NEUBs), bathing water quality and customer satisfaction were seen as less important.	11	12
When rating the importance of Anglian Water's activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable.	22	10
When asked about their priorities customers ranked as the top three: 38%: Continue to reduce the levels of leakage from our network, 28%: Invest to continue to supply high quality drinking water, 26%: Improve river water quality.	32	6
Customers identified their areas of primary concern; Public water leaks (26), Safe and secure water supplies (15), Sewage disposal (20).	33	8
From the community ambassador events the majority of participants ranked **safe, clean water as their top priority** with flourishing environment being their second priority.	35	6
Customers currently believe that it's corporations or business leaders that make the decisions. They don't feel that their own thoughts or opinions would make a difference and impact Anglian Water's business plan. Customers would need to see/hear about the tangible actions taken as a result of their feedback to know that customer consultations are not done in vain.	42	6
The majority of customers place the most importance on areas that have a direct impact on their lives, such as water supply and quality. Customers feel these areas should be prioritised when it comes to the short/medium term future for Anglian Water to address and by feeding back on these topics it's more likely to leverage community spirit and boost engagement.	42	6
Many customers feel lacking in their water saving knowledge and support and are open to receiving this from Anglian Water. Educating customers on ways they can reduce their own usage, as well as giving them the ability to track their own usage through the installation of smart meters, is considered an important step to customers in the preservation of water supplies.	33	8
When it comes to environmental concerns, the availability of water supplies is of utmost importance to customers. Customers want to see action taken to protect available resources, including reducing water wastage through reducing leaks, eliminating pollution of water sources and educating the public on water saving methods. In addition, customers would like to see an increase of water storage capacity (i.e. reservoirs) to help in times of low rainfall.	33	8

When it comes to water supply measures that Anglian Water could put in place, customers want AW to focus on reducing leaks, for example reacting to bursts in water pipes and replacing pipes before they burst. Other things they want to see are a reduction of the interruptions of water supply, and guaranteed compliance within water treatment works. It's viewed as less important to invest in imposing drought restrictions, unplanned asset failures and looking at properties at risk of low pressure. When it comes to water recycling, customers want to see AW utilising water from floods inside of properties, blocked sewers and pollution incidents. Other key areas include utilising flood water when it's outside of the property, maintaining the natural environment and providing excellent water supply on the local beaches. Less important is the focus on carbon emissions from day-to-day activities and supply chains.	58	9
When shared a mix of improvements to both maintain assets and protect for the future at a cost of £21 increase over the AMP more than two thirds (65%) of customers felt that this proposal was acceptable. This seems driven by a perception that it's worth paying extra to ensure high quality and reliable supply of water. Additionally, customers felt that £21 over 5 years is a reasonable, achievable amount. It's worth noting however, that these opinions are valid only if Anglian Water carry out their proposed improvements within this timeframe. Customers want to see visible or tangible evidence that their additional investment has made a difference. About one fifth (18%) of customers, however, disagree with this increase and feel that the financial hit should be taken by shareholders, rather than customers. Also, in the current cost of living crisis, some feel that any increase in customer bills is unacceptable and should be considered only in the future once this crisis is over. They feel that Anglian Water should delay any increase to bills until the economy has recovered. If customers had a clearer indication of what Anglian Water is specifically spending this additional money on (on how it will benefit them financially and otherwise in the future), it might reassure them and open them up towards financing the additional costs.	58	9
	38	15

All customers

	Minimum investment			Enhanced investment
River quality improvements	Statutory improvements	68%	32%	Enhanced improvements (+£13.90 pa)
Tackling climate change	Adapt to least extreme possibilities	63%	37%	Adapt to most extreme possibilities (+£7.20 pa)
Replacing lead pipes in homes	No lead pipes replaced for 5 years	62%	38%	Additional 1% of homes have lead pipes removed (+£5.40 pa)
Increasing water supply	No new water resources for 5 years	45%	55%	Build 2 new reservoirs by mid-2030s (+£3.60 pa)
Reducing leaks	Maintained at current levels	43%	57%	Reduced by a further 7% between 2025 and 2029 (+£1.20 pa)
Helping reduce water usage	Smart meters for all by 2035	49%	51%	Smart meters for all by 2030 (+£1.20 pa)
Reducing impact on rivers from CSOs	Fix high spilling sewers & install debris screens	59%	41%	Fix all spilling sewers & install monitors (+£6 pa)

 Statutory river quality improvements Adapt to least extreme climate change No lead pipes replaced for 5 years Build 2 new reservoirs by mid-2030s (+£3.60 pa) Leakage reduced by a further 7% (+£1.20 pa) Smart meters for all by 2030 (+£1.20 pa) Fix all spilling sewers & install monitors (+£6 pa) 1st Preference 42.2% Bill impact +£12	38	15
Keep assets regularly maintained - the overall consensus (92%) is that you should invest and act now on maintaining both general assets and assets vulnerable to climate change to avoid potential future disruption, water loss and higher costs of repairing broken assets later down the line.	96	8
Educate about the issue - maintaining assets is something 84% of customers are willing to pay around 5-10% more for per year in their bills and customers are more likely to be accepting of this if they're aware of the consequences that might occur if assets are left to deteriorate.	96	8
Focus on climate vulnerable assets - customers are also open to investment in priority areas, such as assets and mains vulnerable to climate change. It's good to start somewhere and have a specific focus on particular assets that might need the most focus.	96	8

PR19 Key Messages (drawn from the AW PR19 report)

No specific insight.

What do the majority of insights suggest?

The priorities work conducted with the online community shows that customers do want investment for the future. When shared a mix of improvements to both maintain assets and protect for the future at a cost of £21 increase over the AMP, more than two thirds (65%) of customers felt that this proposal was acceptable. Follow up work with the online community also shows 92% of customers engaged through acting now in terms of maintenance was preferable. Customers do, however, strike a balance when shown a mix of options trading off service and environmental improvement, short and long term. It is a complex choice which is influenced by overall cost and affordability. The wider work conducted on priorities showed customers chose a mixed programme of investment totaling £12 p.a. increase and included a mix of short- and long-term investments some that were environmentally driven and if a priority is needed then those vulnerable to climate change seems the sensible place to focus.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Future customers.

Are there any insights which contradict the above?

Stakeholders - agencies such as the EA and NE have a wider remit to improve the resilience and environment and this can have a tension against overall affordability.

What do our stakeholders think?

Ofwat has a general duty to ensure affordability for customers now and in the long term and CCW look at affordability but more from a 'supporting those who need assistance' perspective.

Safe, clean and reliable water

1.Water resources - supply

What is the best supply-side option to secure future water needs?

New Insights	Source	Score
Regarding **options** to address supply/demand deficiency, there is no runaway option. Leak reduction on the company-side is the top measure customers would like to see implemented overall. **Desalination (desal) and transfers seem to be less favoured. Businesses spread their preference across a range of options and are more likely to pick transferring water and smart metering** compared to the other groups.	1	15
Despite it having the lowest probability, an event with emergency measures is least acceptable. 36% **feel an event with emergency measures is unacceptable** and 16% overall would not accept non-essential water use bans (24% among non-households). 16% would not accept a risk of temporary use bans (21% among non-households).	1	15
Non billpayers are young, risk-prone, but **more likely to be a little concerned about emergency measures in their lifetime.** 42% of non-billpayers like taking risks (vs 15% overall); 83% of them fall into the 18-24 age group; 62% of them are a little concerned that the next set of measures could happen in their lifetime.	1	15
Drought resilience by 2039 feels right, especially for non-household customers – with non-billpayers more inclined to wait. 52% overall agree with the timeline given (65% among non-HH) but 12% of non-billpayers think it's too soon (vs 6% overall).	1	15
Awareness of drought permits is low but just under half would like these reduced – especially non-households. 67% overall had not heard of them but 43% would like to see them reduced (50% among non-HH). 76% of those who would like a reduction feel strongly about this (82% among non-HH).	1	15
Drought resilience should be achieved at the lowest cost – but subgroups show some key differences in priorities. 24% overall would like Anglian Water to keep bills low (vs 17% for non-HH) while 12% of non-billpayers would like this to happen as soon as possible (vs 7% overall). 7% of non-HH would like solutions with additional benefits (vs 3% overall).	1	15
Customers are used to having a **consistently good supply** of water so interruptions feel like an inconvenience that can be avoided.	2	10
They raise the need to not only **maintain but improve and upgrade the current infrastructure** and increase water storage to ensure continual supply and reduce environmental impacts.	6	11

To manage water supply, customers **lean more towards water storage and reuse methods** due to the perceived positive impacts these options have, economically, and on the environment.	8	10
The benefit of making sure that we will have **enough water supply to meet demand outweighs the negatives**, even if it includes an increase in bills (driven by a desire to future-proof and a strong sense of community spirit).	8	10
The **majority of customers perceive reuse to be a good**, environmentally-friendly supply option compared to desalination, as long as the correct safety procedures are in place and customer costs don't rise.	14	10
Environment is front of mind when it comes to implementing **desalination.**	14	10
Supply options that have a **net positive environmental impact and deliver wider public value** (e.g., recreation and amenity) are **preferred**. Use of chemicals, high energy use, and other unmitigated impacts are key reasons why some options are less favoured.	18	14
Customers want a long-term plan that will place **more weight on options that safeguard supplies** and reduce risk of disruption with a high degree of certainty.	18	14
For supply options, the **driving preferences are certainty and avoiding significant environmental impacts.**	18	14
However, **consumers want to prioritise the core business** activities (which includes protection of the environment, managing flood risk and drought resilience) over the 'added value' elements (boosting the local economy, consulting customers, and creating public amenities etc.	24	14
Businesses, always with an eye on cost, are interested in recycling their water and want water companies to prioritise this.	24	14
Options should meet three criteria: **financially viable; low carbon; and effective in the long-term.** Options that appear short-term stop gaps and/or poor environmentally are largely rejected (including drought permits). **Recycling water and (low carbon) desalination are the most acceptable of the 'new' supply options.** Water transfer and tankering from other countries have least appeal.	24	14
Develop a holistic approach to all aspects of water supply and waste management- **stakeholders want to see a joined-up approach** – and this could help consumers appreciate what appear to be contradictions (higher awareness of flooding undermines the drought message).	24	14
NHH prioritise using grey water above leakage, reflecting the practical and cost-conscious nature of businesses, many of whom already reuse water for non-drinking purposes to cut costs, e.g., using rainwater to wash cattle sheds. **Desalination is rated less highly, being seen as too expensive and with high environmental costs.**	24	14
In the top three options selected for demand and supply options, **27% chose recycling and 31% desalination** (this is in contrast to other research).	24	14
There is **low awareness or understanding of the need for water trading** but once it had been explained there is large-scale support for it. The caveats are that the associated **cost** (transporting, pipework and treating) should be carried by the receiving water company, not the donor, and, importantly, that it should not jeopardise their own water supplies.	25	10
Ranking WRMP Options:	25	10

1.Leakage 2.Water Efficiency (providing water-saving products) 3.Meter Optants 4.Mains Replacement 5.Supply Pipe Renewal 6.Commercial Water Efficiency 7.Metering on Change of Occupancy 8.Consumption Data 9.Reservoir (dam or embankment raising) 10.Extension of Existing Water Treatment Works 11.Water Transfers 12.Reservoir Desilting 13.Desalination 14.Increased Abstraction		
Water interruptions and water quality (taste/smell/ appearance and no boil notices) were ranked in the **highest importance** category, along with flooding.	11	12
When rating the importance of Anglian Water's activities, the top 3 areas are to provide a **reliable source** of clean water, reducing leaks and **keeping prices affordable.**	22	11
When considering different WRMP options **cost is a significant driver** for which plan customers choose	24	10
Due to the constantly changing economic, social and political environment, customers favour WRMP plans that can **easily be adapted** to what's going on in the world. Plans with lower adaptability raise concerns for customers as it increases perceived risk	24	10
Customers have **strong opinions towards desalination**: some feel it's unnecessary, expensive and unsustainable, while others feel like it's the best way to ensure water supply	24	10
Customers are in **high favour of water reuse** as a supply option; they consider it an achievable and effective way to save water	24	10
When communicating regarding a **change of water source** the key areas for customers are: • Raising awareness of water scarcity • Conveying the right level of urgency • Giving the option of more information and the opportunity to raise concerns • Making the issue feel relevant	26	15
When communicating regarding ta change of source **the 'human frame' works** most successfully across all source types. Customers want to know how they will be affected and have little interest for the rationale for the change	26	15
The top-three most highly valued project additions to large Strategic Water Resource infrastructure by households were:' **Specialist habitats** created for wildlife' (£3.87 annually, on average)'New **wetland** area' (£3.24 annually, on average) 'Space provided for **sustainable agriculture**' (£2.61 annually, on average)	30,52,54,54	15
The biggest variation in view on added value for these large infrastructure projects in the qualitative work was by infrastructure project type. This is consistent with the quantitative work where v**aluations of project additions differ considerably**	30,52,54,54	15

across different types of sites and by distance, while the extent of variation across different companies is small.		
In the quantitative work on these large infrastructure projects, overall, project additions at water treatment works were valued most highly, followed by reservoirs, canals, and pipelines. This could be due to reservoirs/canals being naturally more positive/pleasant however qualitatively, people felt that the social project additions at water treatment works would be less valuable as they would be unlikely to want to visit but **environmental and economic benefits were supported.**	30,52,54,54	15
The WTP for a 'package' of project additions with a large infrastructure project was lower than the sum over individual project additions, indicating that that **capping may be needed for individual project additions** to ensure that total WTP is not exceeded.	30,52,54,54	15
The WRE regional synthesis report showed reservoirs were almost universally the top supply-side option, though a small minority of customers were in opposition. Amongst HH customers, sea tankering and desalination were usually the lowest preferences. For customers and stakeholders, the most common decision-making drivers were cost and the environment.	121	11
PR19 Key Messages (drawn from the AW PR19 report)		
With a few exceptions, **customers generally prioritise demand over supply-side water resource options**. They prefer options that avoid perceived waste (leakage reduction, recycling/re-using treated wastewater) and promote efficiency (water-saving devices), as well as a couple of new water resource options (storing water underground and extending existing reservoirs). Customers also **prefer options that are more reliable**. Although some research suggests a degree of support for **transferring water and desalination**, the most robust research suggests these are the **least popular options**. Some customers are **concerned about the use of drinking-grade water for activities** where this is not required (e.g., flushing the toilet, watering the garden, washing the car). There **is support for the concept of 'grey water',** however customers are concerned about the cost and disruption involved in installation. A focus on new builds is seen as a logical place to begin in installing grey water. Customers are supportive of Anglian Water working in partnership with developers to do this. Customers feel that incentives will be needed to encourage installation in existing properties. They also feel that 'grey water' needs a name change and careful branding to build customer support.		
What do the majority of insights suggest?		
Providing a constant supply of clean drinking water is seen as fundamental for a water company. Customers raise the need to **not only maintain but improve and upgrade the current infrastructure and increase water storage to ensure continual supply**. Regarding supply in the future - **awareness of drought permits is low** with 67% of customers being unaware. Regarding preferred options - **customers lean towards water storage options** and **reuse** after demand management solutions. **Reuse is perceived positively in general with less of the 'yuck' factor seen in recent engagement**. Preferences seem to be **driven by cost and environmental impact,** which seems to be why **desalination is less generally preferred**. When looking at the delivery of large supply schemes customers most highly valued project additions such as' **Specialist habitats** created for wildlife' (£3.87 annually, on average)'New **wetland** area' (£3.24 annually, on average) 'Space provided for **sustainable agriculture**' (£2.61 annually, on average). The valuation of project additions **differ considerably across different types of schemes and by distance** from where the scheme would be in relation to the customer. **Environmental and economic** added benefits are generally most well received although there is an overall cap in value of added benefits. When communicating about the implementation of a new water source scheme it is **crucial to make**		

the communications relevant and present in a human frame – what the change means directly for the customer while then ensuring wider communication regarding reasoning and benefits is available.
Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)
The views gathered are from a wide customer base representing the company as a whole – views on particular options may vary if customers who are engaged with are locally impacted by a particular option.
Are there any insights which contradict the above?
The WR16 study contradicts the overall views on desalination, where 27% chose recycling and 31% chose desalination in the top three supply and demand options. This was in direct contrast with other research.
What do our stakeholders think?
There's a tension in stakeholder views on drought, in that for our environmental stakeholders the priority is protecting the environment and reducing demand, whilst other stakeholders are more focused on the need to support economic growth. We frequently talk about our investments in resilience and as a result, there is broad recognition from regional stakeholders around the need for our proposed new reservoirs.

2.Water resources – demand management

How can we instill behaviour change to encourage customers to use less?

New Insights	**Source**	**Score**
Ranking WRMP Options: 1.**Leakage** **2.Water Efficiency (providing water saving products)** **3.Meter Optants** 4.Mains Replacement 5.Supply Pipe Renewal **6.Commercial Water Efficiency** **7.Metering on Change of Occupancy** 8.Consumption Data 9.Reservoir (dam or embankment raising) 10.Extension of Existing Water Treatment Works 11.Water Transfers 12.Reservoir Desilting 13.Desalination 14.Increased Abstraction	25	10
Future customers **rank metering as third** most important priority (overall, it is lead replacement).	19	15
47% non-bill payers think customers should pay based on usage (vs 80% overall).	1	15
Regarding options to address supply/ demand deficiency, there is no runaway option. **Leak reduction** on the company side is the top measure customers would like to see implemented overall. Desal and transfers seem to be less favoured. **Businesses spread their preference across a range** of options and are more likely to pick transferring water and smart metering compared to the other groups.	1	15

When shown a package of demand-side options, the most popular was **medium cost/ medium saving package** (39-40%) with non-bill payers opting for low cost/low savings.	1	15
Non-HH customers also value other aspects. 15% overall would like Anglian Water to focus on leakage reduction (vs 10% for non-HH) but 10% of non-HH choose smart metering (vs 7% overall) and 8% choose transferring water (vs 4% overall).	1	15
Majority agree with **billing based on usage** (especially those who are already on this method of payment) but non billpayers less so. 80% think customers should pay based on usage (vs 47% for non-billpayers).	1	15
Around 70% of customers feel prioritising **demand management** is key to maintain future supplies. 30% of customers, however, do feel that there's a limit to the amount of water customers are able to save.	4	10
Almost all customers in the community feel they're doing all they can to **save water** - they struggle to think of new water-saving methods that they aren't already practicing.	4	10
80% of customers agree with compulsory metering to help save water and keep the cost of bills down.	5	10
For retailers, there are barriers at all levels re water efficiency. They are positive about working with wholesalers to achieve water efficiency, but this involves: • **Capability** - enable retailers to promote with good ideas; work to improve data accuracy and accessibility (make it easy for retailers) • **Opportunity** - identify where investing time/money will be fruitful • **Motivation** - create a commercial motivation through incentives or reputational accreditations. **Ultimately, they see future supply risks as a wholesaler problem.**	9	13
Customers feel that the key to managing demand lies mainly in Anglian Water's hands to implement quick leakage detection; metering and opportunities for 'grey water use' then follow.	8	10
87 % in favour of universal metering.	8	10
For water resources planning - **ensuring the current system is efficient is the starting point**. Practically, this means reducing leaks and removing constraints in the water supply network; in the short-term, efforts will be focused on being more efficient with the water that is currently supplied and helping customers use less water, along with actions that deliver wider benefits and public value, such as catchment management initiatives. Over the longer-term, new resource schemes will be the cornerstone of the plan **because gains from leakage reduction can only go so far** and significant reductions in demand cannot be relied upon.	18	14
Empower customers to help by reducing their water usage - consumers and stakeholders agree that **communication is key.**	24	14
Demand-side options are favoured above new supply options – **with leakage the number one** issue that water companies should address. Other options involving customer behaviour change and universal metering are secondary. **Businesses, always with an eye on costs, are interested in recycling their water** and want water companies to prioritise this.	24	14
Customers and citizens seem willing to reduce their PCC but there is a need for education and raising awareness. Moreover, it is felt that for the water companies to hit their PCC targets, they need to communicate with their customers and get them 'onside'.	25	10

Leakage and water efficiency are the most concerning and important WRMP options for WReN to focus on.	25	10
Cost control is more acute than ever for NHH –so potentially **more receptive to cost saving messages**. There is a complacency about water saving prevalent in all but largest NHH users but focused discussions and exposure to propositions suggests NHH are open to nudges	25	13
NHH engage with propositions that require minimal effort for maximum cost benefit: the **onus is on the water companies** to be proactive with attractive incentives on offer and a mix of short term and long term options are needed	25	13
70% of the participants at community ambassador events held supported the company **requiring customers to have meters**	35	6
69% support increasing water saving campaigns to educate customers on how to reduce water waste	38	14
Any correspondence related to drought shouldn't shy away from the hard truths, it feels much clearer to customers when they are aware of the reality of how serious droughts are as well as how close we are to having a drought. The use of facts, figures and diagrams all aid in helping customers process the severity of drought	40	9
Customers are much more likely to take notice of any drought communications if they are localised and mention specific places within the region. This sense of connection makes the general message of any communications more effective and appealing,	40	9
Many customers agree that a tiered system (increased costs for beyond essential usage) would be effective in saving water, as people would be more likely to monitor and reduce their water usage in an effort to keep costs down. Clarifying thresholds and implementing higher allowances or exemptions for larger families and individuals with certain medical conditions would likely increase the acceptability of these plans.	40	9
Some customers are concerned that higher unit prices are a disguise for Anglian Water to increase profits, rather than to encourage water saving. By demonstrating where the additional payments will be spent, customers may be more trusting and accepting of the proposed tariffs.	40	9
Convey a sense of urgency in drought communications `We're feeling the heat, save water now' came in the top spot for creating a sense of urgency. This was due to the tone and text within the post, particularly around the warning of water being scarce and the plea to use water responsibility. Because of this, the message of monitoring water usage feels more serious and urgent.	45	9
Provide actionable advice when communicating about drought - customers feel that it's well and good telling them what Anglian Water does, though to result in action customers need to be given advice that they can carry out. This is what the majority felt that the top performing creative achieved -particularly around the reminder of limiting the use of water within the garden. Be relatable and contextual. Relatability is key when attracting the attention of customers.	45	9
When in a heatwave, the majority of customers head straight to the garden, so reminding them not to over-use water whilst in the garden feels very relatable to what customers would be doing in that moment. Adding to this, the image of the paddling pool in 'Think of tomorrow, reuse water today' which also came out on top had this element of relatability.	45	9
Some customers mentioned that having a Smart Meter has enabled their water bill to be reduced as they can easily view their usage. This could be a driver for Anglian Water to promote the benefits that Smart Meters can bring.	27	8
The most common feedback from customers is that they don't actually know how much water they are using (even though they may feel they watch their usage). This creates a gap	49	9

in knowledge - there is a need to first and foremost inform them how much they use and how far off that is from what constitutes ‘good’ or ‘efficient-enough’ usage. Sending regular metrics on their exact usage (or estimated) compared to others’ in the area or of similar properties and households would help motivate customers to really try to limit use.		
The majority of customers are keen to do what they can ‘to not waste’ water, but many are not aware that they can have a substantial impact on supply. Present them with clear facts around the supply issues in their area (avoid a tone of condescension and blame) along with tangible actions they can take to make a difference, they will be more receptive to changes in their behaviour/lifestyle which may require more effort. Older groups who have small homes and who are likely to use much have an increased perception of already doing a lot - messaging to these groups should not receive messaging that points to their inability or lack of interest in saving water. Similarly, those who live with someone with a disability (who may be on the PSR) are limited in their ability to use less and should be communicated what options they have.	49	9
Educate customers around what Anglian Water already does, but why that is not enough. The fact that the region is dry and growth is happening is not a huge surprise - these are things customers expect AW to have planned for.	49	9
Most who have been moved to a meter cite it was that which forced them to confront, assess and change daily usage. However, many feel they need a smart meter in their home to easily track usage and keep it more top of mind. Many feel they’re already using the least amount of water they can - there are a certain amount of ‘non-negotiable’ daily actions - most would welcome further ideas on how to save. However, rather than behavioural, these changes are more likely to be structural, using grey water for flushing the toilet, watering the garden or washing the car or smart meters in every home.	49	9
For disabled customers when thinking about introducing metering you can boost confidence and trust by: • Providing clear but detailed, accessible information with concrete examples of metered costs so they can compare • Considering disabled people’s needs and concerns when making any announcement about moving to meters • Adding notifications about meter readings done by Anglian Water • Providing information about ways to save water • Providing information about water saving equipment and considering offering them as incentives • Highlighting the trial period option and explicit conditions attached	55	13
Meter announcements: If there was announcement about moving to meters, disabled customers prefer: • written announcements that they could revisit (by email and post) • links to sources with detailed information and information included with the letter • emails or live chat for additional questions (with customer service staff knowing they are disabled) • notice at least few months in advance • a personal account notification to confirm (for verification) • added personalised comparison information about cost	55	13
From the community ambassador events 71% of customers thought AW should require all customers to have a meter.	66	6
Most customers (77%) feel positive about the water saving tips as a collective, as they are considered helpful education tools that provide practical and easy to implement advice on	69	8

how customers can reduce their electricity and water bills. While most customers are already aware of these tips and implement them already, the overall feeling is that it's good to get the message out as a reminder and encouragement to other customers.		
43% agree that the tips shown help them to better understand the connection between water and energy saving, as the examples clearly explain how water and energy affect each other in everyday ways (costs electricity to heat water)	69	8
Anglian Water should consider how to keep those in negative/neutral groups engaged re water saving. An addition of some fresher and more innovative tips would likely be more effective overall.	69	8
When testing three water saving messages there weren't big margins of difference between the three options, 'Wasting water is socially unacceptable' is seen as the most impactful, closely followed by 'Saving water can protect your local community', with 'Wasting water is bad for the environment' coming last. Overall, strong facts about wasting water need to be combined with personal, yet engaging and positive messaging to encourage customers to consider their usage and do their bit to save water. Including information on what AW is doing (i.e. mending leaky pipes, creating more reservoirs) would help bolster confidence in the company and make customers feel it's a team effort, rather than the onus being on them. Moreover, providing targets and clear steps to take – alongside tools to track and facilitate that – e.g. smart water meters – would be welcomed.	72	8
While Seasonal Demand tariffs are rejected by customers, Rising Block tariffs could be considered - Many customers agree that a tiered system (increased costs for beyond essential usage) would be effective in saving water, as people would be more likely to monitor and reduce their water usage in an effort to keep costs down. Clarifying thresholds and implementing higher allowances or exemptions for larger families and individuals with certain medical conditions would likely increase the acceptability of these plans.	41	9
Need to reassure customers that water demand tariffs are designed to encourage water saving over increasing profits.	41	9
Regarding demand management comms - **Convey a sense of urgency** `We're feeling the heat, save water now' came in the top spot for creating a sense of urgency. This was due to the tone and text within the post, particularly around the warning of water being scarce and the plea to use water responsibility. **Provide actionable advice**- Customers feel that it's well and good telling them what Anglian Water does, though to result in action customers need to be given advice that they can carry out. **Be relatable and contextual -** Relatability is key when attracting the attention of customers. When in a heatwave, the majority of customers head straight to the garden, so reminding them not to over-use water whilst in the garden feels very relatable.	86	9
In the WRE synthesis report almost all HH customers and some stakeholders displayed a preference for demand-side options over supply-side. NHH customers were more supportive of both supply and demand-side options, reflecting their high levels of concern about future water supply. Those without a strong preference tended to opt for a balance between both.	121	11
The top demand-side option for customers was reducing leakage (company-side). Education approaches related to behaviour change were mentioned often, and there was customer and stakeholder appetite for more education regarding how to save water, alongside incentives from water companies.	121	11

Overall, the majority of customers feel they're fully capable of identifying a leak themselves and if customers perceive the cost to be low or if they have the DIY skills and knowledge, they are more likely to fix the leak themselves. On the other hand, if they lack DIY skills or perceive the cost to be high, they may be less likely to fix the leak. There's no expectation for Anglian Water to offer to fix leaking toilets free of charge, however, if this was offered, the large majority of customers wouldn't decline.	123	8
Whilst in theory, most customers would support Anglian Water in working together with farmers on the Cover Crop scheme, though it's not viewed as highly important, 90% are either very supportive or somewhat supportive. Most believe Cover Crop is a good idea and feel positive towards the project's potential to bring multiple advantages to farmers, consumers, and the environment, particularly as farmers are facing challenges like climate change impacts, droughts, and flooding. Many emphasise the importance of preserving soil fertility, preventing flooding, and reducing chemical usage for the environment's sake. Others highlight benefits such as better water retention, reduced water usage, and improved crop yields.	124	8
Saving money is the most important motivation for reducing water usage, followed by protecting the environment.	133	11
PR19 Key Messages (drawn from the AW PR19 report)		
There are high rates of **metering** for both household and business customers in the Anglian area. Rates are much lower for Hartlepool Water, however some (limited) recent research suggests customers in Hartlepool are interested in the potential of meters to help save money. **Awareness of the free water meter scheme has been increasing** among both Anglian Water and Hartlepool Water customers over the past few years; awareness of the 24-month trial has also been increasing among Hartlepool Water customers. Evidence **suggests most customers are supportive of meters**, which are generally seen as the fairest way to pay. Customers also feel meters focus their minds on saving. **Compulsory metering divides opinion**. However, recent research suggests that, on average, household customers support this over encouraging optional metering. There is support for Anglian Water's strategy to achieve 95% coverage of meters by 2035. There is a **great deal of interest in smart meters**; these were one of the most popular ideas that customers came up with for encouraging behaviour change. Some recent evidence suggests most customers are now happy to have a smart meter. However, support for this, and interest in controlling water use remotely, varies by customer segment. Customers highlight financial savings, the opportunity to make informed choices, early detection of leaks, and the chance to educate children about the cost of water used in common household activities as motivations for installing a smart meter. However, they want more information about who is eligible, the installation process, and the costs involved in maintaining smart meters. **Customers feel smart meters will be the norm in future**. Feedback on Anglian Water's smart meter welcome letter, sample monthly report and 'My Use Portal' was generally positive. Plans for advanced metering were one of the areas that stood out as particularly interesting to participants who took part in the consultation on the draft PR19 plan. Customers acknowledge that the combination of increasing demand and decreasing supply creates challenges for Anglian Water. 'Supply Meets Demand' is regarded as one of the most important of the company's ten outcomes. Customers are very concerned about population growth and new development; enabling sustainable growth is generally seen as the second most important of the company's four long-term goals, after resilience (although customers link the two issues). Customers **want the company to plan ahead**, influence the planning system, and work in partnership with landlords and developers to 'design-in' water		

efficiency. Some customers want to know more about what the company is doing in this area; others want it to 'just get on with it' (as the experts). However, knowing that Anglian Water plans 25 years ahead boosts perceptions of it as a proactive and forward-thinking company.

Helping customers to reduce their own water use is seen as an important way of tackling pressures on the water system. Most customers recognise they have a responsibility to change their behaviour, however some are skeptical about the difference their own actions will make, without other customers also doing the same. **For customers to feel motivated, they need to know which actions will have the greatest impact**; they also want to know that Anglian Water is 'doing its bit' too. Most customers feel Anglian Water is promoting water efficiency, but awareness of the company's activities in this area is low. **Financial incentives are a key motivator for reducing consumption**, but evidence suggests campaigns will need to appeal to a range of motivations that may differ by customer group. There is room to increase awareness of behaviour change campaigns. Evidence suggests future campaigns are more likely to capture customers' attention if they: **bring the issues to life for people; build in an element of competition; harness the power of collective and local efforts; and are centred around children and young people**. Evidence suggests **most customers support the 80 litres per person per day goal**, however, of the company's seven water quality and customer satisfaction goals, there is least support for this one. Some customers view it as **'unfair rationing'**. There is support for the company's PR19 plans to help customers reduce their use.

It is very important to customers that Anglian Water 'does its bit' to conserve water. **Customers are particularly concerned about leaks**, which are seen as an 'emblematic issue'. Although some research suggests most customers are broadly satisfied with Anglian Water's current (industry-leading) performance on leaks, this is still regarded as the worst aspect of the water service and a very clear priority for future improvement and investment. Leaks are seen as an unnecessary waste of a precious natural resource. They are also seen as one reason why restrictions are sometimes necessary and tackling them is a customer priority for dealing with the deficit. **Slow restoration times for leaks feeds negative sentiment about the company**. There is some (limited) evidence that customers in Hartlepool are more satisfied with the company's response to leaks, however, this is still a priority for improvement. Customers support the zero leakage and bursts target but want to know more about how it will be achieved in practice. Anglian Water's PR19 plans on leakage are very well received. **There is support for the additional leakage charge for enhanced performance, so long as it remains at the £4 mark**. Most customers feel the targets in the business plan for leaks and reactive and mains bursts are sufficiently stretching, although agreement is lower for the burst targets than for other water measures in the plan.

What do the majority of insights suggest?

Before any supply options can be considered, there is a **strong view to 'get your house in order'** first. **Reducing customer consumption** is generally seen as the next priority (after leakage reduction) – with education being a key element of its delivery (with more innovation and communication needed to help encourage customers and stakeholders). There is, however, some recognition that this can be difficult to achieve. This is closely followed by **metering with most customers seeing this as a fair way to charge** for water. The views on universal/compulsory metering seem to have **shifted** more positively from PR19 with more general acceptance. There is also a real interest in smart meters. Communications regarding drought should provide a sense of urgency and give actionable advice.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Non-household and retailers have an important role in this area, as do stakeholders, such as Waterwise.

Are there any insights which contradict the above?

There is **some contradiction** regarding the level of leakage repair, with some customers feeling it should be done at any cost, while others suggesting there should be a cost-benefit ratio**. Businesses** spread their preferences across a range of options and are more likely to pick transferring water and **smart metering. For businesses, the focus is always on cost; they are interested in recycling their water** and want water companies to prioritise this. For **retailers,** there are **barriers** at all levels regarding water efficiency – ultimately, seeing the issues of water efficiency as the wholesalers' problem. Disabled customers highlighted more bespoke communications to assist with their needs in this area.

What do our stakeholders think?

This is a key area of focus from organisations such as Waterwise but there is a general consensus across stakeholder groups to encourage water saving as part of the tools available to deal with water shortages. There's a tension in stakeholder views on drought, in that for our environmental stakeholders the priority is protecting the environment and reducing demand, whilst other stakeholders are more focused on the need to support economic growth. There is an increasing concern from some regional stakeholders about our ability to support new non-household demand, given the impact of the EA's abstraction reduction strategy, and the limited headroom we have in many parts of the region.

3.Water resources – leakage

Do you want us to continue to reduce the levels of leakage in our network?

New Insights	**Source**	**Score**
Ranking WRMP Options: 1.**Leakage** **2.Water Efficiency (providing water saving products)** **3.Meter Optants** 4.Mains Replacement 5.Supply Pipe Renewal **6.Commercial Water Efficiency** **7.Metering on Change of Occupancy** 8.Consumption Data 9.Reservoir (dam or embankment raising) 10.Extension of Existing Water Treatment Works 11.Water Transfers	25	10

12.Reservoir Desilting 13.Desalination 14.Increased Abstraction		
15% overall would like Anglian Water to focus on company-side leakage reduction (vs 10% for non-HH).	1	15
Regarding options to address supply/ demand deficiency, there is no runaway option. **Leak reduction** on the company side is the top measure customers would like to see implemented overall. Desal and transfers seem to be less favoured. **Businesses spread their preference across a range** of options and are more likely to pick transferring water and smart metering compared to the other groups.	1	15
When shown a package of demand-side options, the most popular was **medium cost/ medium saving package** (39-40%) with non-bill payers opting for low cost/low savings.	1	15
Company-side **leak reduction** is the **top supply & demand measure** –but **non-HH customers also value other aspects**. 15% overall would like Anglian Water to focus on leakage reduction (vs 10% for non-HH) but 10% of non-HH choose smart metering (vs 7% overall) and 8% choose transferring water (vs 4% overall).	1	15
Waste is the primary concern surrounding **leakages**.	2	10
Generally, customers understand that it's not **practically or economically feasible to achieve zero leakages**, however, this doesn't stop the majority of customers (**70%**) thinking it should be driven down.	3	10
30% of customers are aware that Anglian Water is doing as much as it can, and they recognise there is a balance between **leakage** and cost.	3	10
Reducing leaks and floods linked to eco-impacts and infrastructure upgrades - customers raise several key points: **tackle leaks to minimise water loss**; maintain sewers and educate customers on what not to put down toilets/drains to keep pipes flowing freely and to prevent flooding as well as sewage overflow.	6	11
Majority of customers were in favour of AW's suggestions to support vulnerable customers in some way re **Customer Side Leakage (CSL)**; there were **mixed feelings on the plan to spread the cost of the initiatives amongst all**.	6	11
Some customers feel investing in leaks is essential to long-term sustainability and should be done at any cost (even if that means customers' bills rising) while others are more measured, feeling **cost benefit analyses must be carried out to ensure it's worth the price tag**. Debate over who pays – should it be profits?	6	11
Customer-side leakage - customers are willing to pay for and sort leaks in their homes but feel less responsible for leaks in underground pipes on their property. Spontaneously, many suggested they would need support in dealing with a leak.	6	11

Cost, location and plumber availability are the biggest barriers to **customers repairing leaks.**	6	11
Retailers support leakage interventions but want more emphasis on detection than repair. Internal leakage propositions are supported but they still think it could be simplified. Participating retailers were enthusiastic about water audits but want them simple and efficient. Purchase/replacement of appliances are positively received but need further developing. **Non-potable usage – regarded as a good idea** is perceived to be niche. Incentives and rebates appeal in principle but need refining.	10	13
Customers feel that the key to managing demand lies mainly in Anglian Water's hands to implement quick leakage detection; metering and opportunities for 'grey water use' then follow.	8	10
For water resources planning - **ensuring the current system is efficient is the starting point**. Practically, this means reducing leaks and removing constraints in the water supply network; in the short-term, efforts will be focused on being more efficient with the water that is currently supplied and helping customers use less water, along with actions that deliver wider benefits and public value, such as catchment management initiatives. Over the longer-term, new resource schemes will be the cornerstone of the plan **because gains from leakage reduction can only go so far** and significant reductions in demand cannot be relied upon.	18	14
Demand-side options are favoured above new supply options – **with leakage the number one** issue that water companies should address. Other options involving customer behaviour change and universal metering are secondary. **Businesses, always with an eye on costs, are interested in recycling their water** and want water companies to prioritise this.	24	14
Leaks are seen as an important issue and there is **widespread condemnation of letting fresh water run as it is seen as wasteful and morally dubious**. Customers and citizens want the water companies to **'get their houses in order'** first, as this will lead to a greater supply, before attempting to reduce PCC for example, and water trading.	25	10
Leakage and water efficiency are the most concerning and important WRMP options for WReN to focus on.	25	10
Reducing leakage was the second priority for Anglian Water customers.	19	15
When rating the importance of Anglian Water's activities, the top three areas are: to provide a reliable source of clean water; **reducing leaks;** and keeping prices affordable.	22	12
PR19 Key Messages (drawn from the AW PR19 report)		
There are high rates of **metering** for both household and business customers in the Anglian area. Rates are much lower for Hartlepool Water, however some (limited) recent research suggests customers in Hartlepool are interested in the potential of meters to help save money. **Awareness of the free water meter scheme has been increasing** among both Anglian Water and Hartlepool Water customers over the past few years; awareness of the 24-month trial has also been increasing among Hartlepool Water customers. Evidence		

suggests most customers are supportive of meters, which are generally seen as the fairest way to pay. Customers also feel meters focus their minds on saving. **Compulsory metering divides opinion**. However, recent research suggests that, on average, household customers support this over encouraging optional metering. There is support for Anglian Water's strategy to achieve 95% coverage of meters by 2035. There is a **great deal of interest in smart meters**; these were one of the most popular ideas that customers came up with for encouraging behaviour change. Some recent evidence suggests most customers are now happy to have a smart meter. However, support for this, and interest in controlling water use remotely, varies by customer segment. Customers highlight financial savings, the opportunity to make informed choices, early detection of leaks, and the chance to educate children about the cost of water used in common household activities as motivations for installing a smart meter. However, they want more information about who is eligible, the installation process, and the costs involved in maintaining smart meters. **Customers feel smart meters will be the norm in future**. Feedback on Anglian Water's smart meter welcome letter, sample monthly report and 'My Use Portal' was generally positive. Plans for advanced metering were one of the areas that stood out as particularly interesting to participants who took part in the consultation on the draft PR19 plan.

Customers acknowledge that the combination of increasing demand and decreasing supply creates challenges for Anglian Water. 'Supply Meets Demand' is regarded as one of the most important of the company's ten outcomes. Customers are very concerned about population growth and new development; enabling sustainable growth is generally seen as the second most important of the company's four long-term goals, after resilience (although customers link the two issues). Customers **want the company to plan ahead**, influence the planning system, and work in partnership with landlords and developers to 'design-in' water efficiency. Some customers want to know more about what the company is doing in this area; others want it to 'just get on with it' (as the experts). However, knowing that Anglian Water plans 25 years ahead boosts perceptions of it as a proactive and forward-thinking company.

Helping customers to reduce their own water use is seen as an important way of tackling pressures on the water system. Most customers recognise they have a responsibility to change their behaviour, however some are skeptical about the difference their own actions will make, without other customers also doing the same. **For customers to feel motivated, they need to know which actions will have the greatest impact**; they also want to know that Anglian Water is 'doing its bit' too. Most customers feel Anglian Water is promoting water efficiency, but awareness of the company's activities in this area is low. **Financial incentives are a key motivator for reducing consumption**, but evidence suggests campaigns will need to appeal to a range of motivations that may differ by customer group. There is room to increase awareness of behaviour change campaigns. Evidence suggests future campaigns are more likely to capture customers' attention if they: **bring the issues to life for people; build in an element of competition; harness the power of collective and local efforts; and are centred around children and young people**. Evidence suggests **most customers support the 80 litres per person per day goal**, however, of the company's seven water quality and customer satisfaction goals, there is least support for this one. Some customers view it as **'unfair rationing'**. There is support for the company's PR19 plans to help customers reduce their use.

It is very important to customers that Anglian Water 'does its bit' to conserve water. **Customers are particularly concerned about leaks**, which are seen as an 'emblematic issue'. Although some research suggests most customers are broadly satisfied with Anglian Water's current (industry-leading) performance on leaks, this is still regarded as the worst aspect of the water service and a very clear priority for future improvement and investment. Leaks are seen as an unnecessary waste of a precious natural resource. They are also seen as one reason why restrictions are sometimes necessary and tackling them is a customer priority for dealing with the deficit. **Slow restoration times for leaks feeds negative sentiment about the company**. There is some (limited) evidence that customers in Hartlepool are more satisfied with the company's response to leaks, however, this is still a priority for improvement. Customers support the zero leakage and bursts target but want to know more about how it will be achieved in practice. Anglian Water's PR19 plans on leakage are very well received. **There is support for the additional leakage charge for enhanced performance, so long as it remains at the £4 mark**. Most customers feel the targets in the business plan for leaks and reactive and mains bursts are sufficiently stretching, although agreement is lower for the bursts targets than for other water measures in the plan.

What do the majority of insights suggest?

Before any supply options can be considered there is a **strong view to 'get your house in order'** first. For a significant majority of customers that means fixing leaks. **Leakage features as the second most important thing AW needs to do** (behind providing good quality water) consistently across research – driven by the view this is **just wasteful**. Some customers say 'at any cost', although this does differ across segment. **Customer-side leakage,** although less familiar, is also prioritised, with support for customers needing financial help with this viewed positively.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Non-household and retailers have an important role in this area, as do stakeholders, such as Waterwise.

Are there any insights which contradict the above?

There is **some contradiction** regarding the level of leakage repair, with some customers feeling it should be done at any cost, while others suggesting there should be a cost-benefit ratio**. Businesses** spread their preferences across a range of options and are more likely to pick transferring water and **smart metering.**

For businesses, the focus is always on cost; they are interested in recycling their water and want water companies to prioritise this. For **retailers,** there are **barriers** at all levels regarding water efficiency – ultimately, seeing the issues of water efficiency as the wholesalers' problem. Disabled customers highlighted more bespoke communications to assist with their needs in this area.

What do our stakeholders think?

Whilst we get fewer questions on leakage now than we used to, this is still a priority for stakeholders and especially comes out in our discussions around drought resilience. There is a clear expectation from all stakeholders that we should be on top of leakage before we consider placing restrictions on customers.

4.Water quality

Are there any areas we need to improve for water quality?

New Insights	Source	Score
Customers state they want a **safe, reliable water supply available to everyone**. This is, many point out, AW's 'raison d'etre' and the **absolute base level of expectation**.	6	10
Good **quality water** is the most important thing for customers and seen as the **most important service** AW provides. It's seen as a baseline necessity and right to have clean, potable water coming directly through the tap.	2	9
Continue to supply high quality water now and in the future is the **number one priority for Anglian customers.**	19	14
Despite **high costs,** replacing **lead pipes was as high a priority as leakage for Anglian customers.**	19	14
Future customers rank metering as third most important priority (overall, it is lead replacement).	19	14
Water interruptions and **water quality (taste/smell/ appearance and no boil notices) were ranked in the highest importance** category, along with flooding.	11	11
When rating the importance of Anglian Water's activities, the top three areas are to provide a reliable source of **clean water**, reducing leaks and keeping prices affordable.	22	11
Of customers surveyed 93% satisfied with colour and appearance, 83% taste and smell, 46% hardness (significantly lower than WaSCs) and 92% with safety	36	8
8.5% of customers surveyed in the CES mirror survey thought Anglian Water could improve water quality (includes hardness)	37	11
In terms of communicating about hard water, the creatives that performed the best, 'The natural journey of hard water' and 'The science behind hard water' both focused on new information that customers likely hadn't heard before (e.g. the health benefits of calcium and minerals). Since some preconceived perceptions of hard water was that it can be detrimental to health, this reassured customers that there are some strong benefits to living with hard water. Future communications would benefit from focusing on these health-related benefits	43	8
Almost all customers are already aware of at least one negative of living with hard water (whether that's the damage that limescale does to appliances or the struggles of washing hair/themselves). As they're already aware of these negatives, customers	43	8

feel they shouldn't be hidden or ignored. It would likely be more appreciated if tips or information acknowledged the downsides or showed some understanding - 'we know that you face this problem, and this is how we can help'.		
Most customers can recount their experiences of living with hard water and are keen to share their experiences with others; a more customer-centred approach to comms may be well received. For example, social posts including customers sharing their own tips on managing limescale or using hard water to wash or garden with, or encouraging engagement by asking customers to 'share your hard-water garden pictures'. This could help to drive the perception that all customers are 'in it together'; a relatable and human approach.	43	8
The majority of the public places trust in their water companies to provide good quality of water and provide a reliable service. Yet only a third trust their water company to prevent sewage from entering rivers or seas. Over time, trust has fallen in water companies' abilities to perform a range of responsibilities, including ensuring good quality drinking water and providing a reliable service.	62	13
PR19 Key Messages (drawn from the AW PR19 report)		
Safe, clean water is a fundamental customer expectation. It is seen as the most important of Anglian Water's ten outcomes. **All attributes are regarded as important, especially aesthetics (taste, odour and discolouration)** and a plentiful supply with no interruptions. Improvements in water services appear to be more important in customers' decisions to support a package of service changes than improvements to the waste service. Customers are aware that water quality can be affected by many factors, including nature, household activities, and industry and farming. **Water quality is regarded as good**. The vast majority of customers of both Anglian Water and Hartlepool Water are satisfied with the safety of their water. Some customers are concerned, though, about the **mass consumption of plastic** and some want common issues with water quality to be addressed so use of bottled water declines. Achieving 100% compliant and chemical-free drinking water is seen as the most important of the company's seven water quality and customer satisfaction goals. There is **support for Anglian Water's PR19 plans to achieve zero compliance failures**, including by working with stakeholders, businesses and farmers. The **most frequent problems with the water service relate to aesthetic quality, hardness (for households)**, low pressure, and (for households unplanned and business customers planned) supply interruptions. While problems with aesthetics and water pressure are fairly common, the vast majority of customers are satisfied with these aspects of their water service. Among Anglian Water customers, satisfaction with the taste and smell of water and water pressure has been rising over the past few years. Evidence suggests customers support the company's plans in relation to improvements to discolouration. Some research suggests that while low pressure is a common issue, customers do not find it unduly distressing in the short-term, and do not immediately buy-into Anglian Water's investment plans in this area. However, there is support for the company's PR19 plans on this topic. There is some concern about lead in pipes. However, **take up of Anglian Water's incentivisation scheme for customers to replace lead pipes surrounding their properties has been very low.** Available information suggests this may be because customers feel the work is too expensive and will cause too much disruption. **Satisfaction with the hardness of water is markedly lower than satisfaction with other aspects of the service**; Anglian Water scores poorly on this dimension in relation to other companies. PR19 research **suggests customers generally prefer soft to hard water** as it involves less time and expense in removing limescale, requires less detergent, means household appliances last longer, and (for many people) tastes better. However, **most customers accept hard water is a feature of the local water environment** and learn to live with it. Some research suggests customers generally feel it is the responsibility of homeowners to tackle hard water, while other research suggests customers **may be willing to pay more for the water company to take action**.		

What do the majority of insights suggest?

Customers state they want a **potable, safe, reliable water supply available to everyone.** This is, many point out, AW's 'raison d'etre' and the **absolute base level of expectation.** Across all PR19 and PR24 research, **water quality ranks highly.** Customers view quality through the lens of **taste, smell and appearance,** with **hardness being a concern.** While it was accepted that hard water is a feature of where they live there was some suggestion in PR19 research that **hardness was a source of dissatisfaction** and that can be seen in more recent engagement too with communication (perhaps from customers themselves) being seen as a positive. Despite the high-cost, **lead pipe replacement is seen as a high priority** for the majority of customers, although PR19 engagement did show concerns regarding the disruption of replacement.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Those business customers who use water for a specific process or hospitals etc. who need guaranteed quality.

Are there any insights which contradict the above?

Views from future customers may vary, with recent research showing them ranking metering higher than lead replacement as a priority – a contrast with the wider customer base.

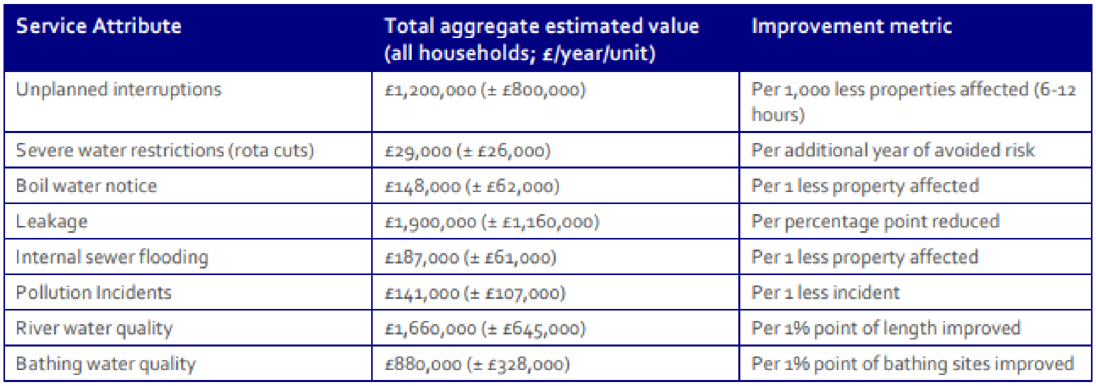
What do our stakeholders think?

The DWI are the focused stakeholder and regulator in this area. This doesn't come across strongly in discussions with stakeholders. It seems a given amongst stakeholders that AW prioritise this, and it only comes up in stakeholder discussions when stakeholders are speaking to us on behalf of customers who have issues. From a wider media perspective, there have been recent articles related to PFAS regulations in the USA – there has been some follow-up in UK media and a question was raised in the House of Commons on the 19 May 2023.

5. Disruptions - supply interruptions

Do customers want to see us maintain rather than improve current service levels for supply?

New Insights	Source	Score
62% non-bill payers are a little concerned that the next set of (drought) **emergency measures** could happen in their lifetime (vs 47% overall).	1	13
Despite it having the lowest probability, an event with emergency measures is least acceptable. 36% **feel an event with emergency measures is unacceptable** and 16% overall would not accept non-essential water use bans (24% among non-households). 16% would not accept a risk of temporary use bans (21% among non-households).	1	13

<table>
<tr><td>Non billpayers are young, risk-prone, but more likely to be a little concerned about emergency measures in their lifetime. 42% of non-billpayers like taking risks (vs 15% overall); 83% of them fall into the 18-24 age group; 62% of them are a little concerned that the next set of measures could happen in their lifetime.</td><td>1</td><td>13</td></tr>
<tr><td>Customers are used to having a consistently good supply of water so interruptions feel like an inconvenience that can be avoided.</td><td>2</td><td>10</td></tr>
<tr><td>They raise the need to not only maintain but improve and upgrade the current infrastructure and increase water storage to ensure continual supply and reduce environmental impacts.</td><td>6</td><td>11</td></tr>
<tr><td>The benefit of making sure that we will have enough water supply to meet demand outweighs the negatives, even if it includes an increase in bills (driven by a desire to future-proof and a strong sense of community spirit).</td><td>8</td><td>10</td></tr>
<tr><td>Customers want a long-term plan that will place more weight on options that safeguard supplies and reduce risk of disruption with a high degree of certainty.</td><td>18</td><td>13</td></tr>
<tr><td>Water interruptions and water quality (taste/smell/ appearance and no boil notices) were ranked in the highest importance category, along with flooding.</td><td>11</td><td>12</td></tr>
<tr><td>When rating the importance of Anglian Water’s activities, the top 3 areas are to provide a reliable source of clean water, reducing leaks and keeping prices affordable.</td><td>22</td><td>11</td></tr>
<tr><td>97% of surveyed customers satisfied with reliability of supply</td><td>36</td><td>8</td></tr>
<tr><td>17.7% of customers surveyed in the CES mirror survey though Anglian Water could repair leaks better or quicker</td><td>37</td><td>11</td></tr>
<tr><td>Household valuations

<table>
<tr><th>Service Attribute</th><th>Total aggregate estimated value (all households; £/year/unit)</th><th>Improvement metric</th></tr>
<tr><td>Unplanned interruptions</td><td>£1,200,000 (± £800,000)</td><td>Per 1,000 less properties affected (6-12 hours)</td></tr>
<tr><td>Severe water restrictions (rota cuts)</td><td>£29,000 (± £26,000)</td><td>Per additional year of avoided risk</td></tr>
<tr><td>Boil water notice</td><td>£148,000 (± £62,000)</td><td>Per 1 less property affected</td></tr>
<tr><td>Leakage</td><td>£1,900,000 (± £1,160,000)</td><td>Per percentage point reduced</td></tr>
<tr><td>Internal sewer flooding</td><td>£187,000 (± £61,000)</td><td>Per 1 less property affected</td></tr>
<tr><td>Pollution Incidents</td><td>£141,000 (± £107,000)</td><td>Per 1 less incident</td></tr>
<tr><td>River water quality</td><td>£1,660,000 (± £645,000)</td><td>Per 1% point of length improved</td></tr>
<tr><td>Bathing water quality</td><td>£880,000 (± £328,000)</td><td>Per 1% point of bathing sites improved</td></tr>
</table></td><td>65</td><td>15</td></tr>
<tr><td>The values vary notably between methods of valuation and, as expected, increase with duration. The findings demonstrate the importance of understanding how values can vary across methods.
The results also show that the stated preference compensation value is higher when the need for the water is greater on hot summer days. The findings do not include altruism when comparing them to other valuations within the triangulation process. Also, the</td><td>90</td><td>15</td></tr>
</table>

<table>
<tr><td>avertive value is a partial value only capturing direct expenditure and impact on time, the subjective wellbeing and stated preference values will capture a fuller value.
<table>
<tr><th>Duration</th><th>Avertive behaviour valuations (£/hh)</th><th>Subjective wellbeing valuations (£/hh)</th><th>Stated preference valuations (£/hh)</th></tr>
<tr><td>3 to 6 hours</td><td>£12.90</td><td>£233</td><td rowspan="3">£1,345</td></tr>
<tr><td>6 to 12 hours</td><td>£28.11</td><td>£326</td></tr>
<tr><td>12 to 24 hours</td><td>£31.25</td><td>£333</td></tr>
<tr><td>24 to 48 hours</td><td>£37.82</td><td>£484</td><td></td></tr>
<tr><td>2 to 4 days</td><td>£74.07</td><td>£1,317</td><td></td></tr>
</table>
</td><td></td><td></td></tr>
<tr><td>The level of inconvenience across the three events explored varied greatly between customers, but over 90% engaged in at least one avertive behaviour showing widespread impacts are caused by supply interruptions. The most common avertive behaviour being buying bottled water (65%) with only 17% using the Anglian water pick up point.</td><td>90</td><td>15</td></tr>
<tr><td>Inconvenience was highest for toilet use and personal hygiene during an interruption event.</td><td>90</td><td>15</td></tr>
<tr><td>Most customers did not contact Anglian Water during the three events explored (75%) although there was some thought that communication could be improved (14%).</td><td>90</td><td>15</td></tr>
<tr><td>While customers in North Norfolk largely agree with hosepipe bans being necessary when water supplies are limited and during hot, dry weather, over a quarter believe that the public shouldn’t have to make these sorts of changes during a drought.</td><td>94</td><td>10</td></tr>
<tr><td>When testing communications regarding TUBs, the majority of customers said they would naturally comply with a hose pipe ban regardless of any messaging provided, as they believe hose pipe bans are policed and customers are required by law to comply. Overall, customers preferred the statements that were direct, to the point and provided an explanation as to why they need to conserve water and stop using hose pipes. Uncertain wording like ‘let’s’ or ‘can’ puts doubt into customers' minds on whether it’s a requirement to comply and makes it feel like an optional invitation. Instead, using strong words such as ‘must’ would increase perceived importance.</td><td>106</td><td>9</td></tr>
<tr><td colspan="3">PR19 Key Messages (drawn from the AW PR19 report)</td></tr>
<tr><td colspan="3">Interruptions to supply are among the more commonly experienced problems with the water supply for both types of customers (especially unplanned interruptions). However, household satisfaction with performance on unplanned interruptions is relatively high, and most of these customers support maintaining rather than improving current service levels. Satisfaction is lower for non-household customers, and improvement is more important to them. However, research suggests both types of customers are willing to pay to improve current service levels. Recent engagement suggests that disruption is where the company becomes a ‘hero or a villain’, depending on how incidents are dealt with. Engagement with customers who have experienced a recent outage revealed most were not unduly inconvenienced.</td></tr>
</table>

Satisfaction with the company's response was mixed. There is room to improve communication with customers in the event of an incident. It is especially important to customers to know how long an interruption is likely to last, so they can plan around this. (Limited) research suggests that interruptions lasting up to 12 or even 24 hours are generally manageable, although this depends on the time/day of the week, and **customers are concerned about the impact on those with young children, with disabilities, the elderly, and local businesses**. For interruptions lasting more than 12 to 24 hours, there is some support for using tankers to supply water, but there are also concerns about the impact on traffic flow and noise. Generally, customers do not support bill increases to fund this solution. There is strong support for Anglian Water's draft PR19 proposals on interruptions, and support for its plans to reduce the number of properties on a single supply (although this is less of a customer priority).

Drought resilience - with a few exceptions, **customers generally prioritise demand over supply-side water resource options**. They prefer options that avoid perceived waste (leakage reduction, recycling/re-using treated wastewater) and promote efficiency (water-saving devices), as well as a couple of new water resource options (storing water underground and extending existing reservoirs). Customers also **prefer options that are more reliable**. Although some research suggests a degree of support for **transferring water and desalination**, the most robust research suggests these are the **least popular options**. Some customers are **concerned about the use of drinking-grade water for activities** where this is not required (e.g., flushing the toilet, watering the garden, washing the car). There **is support for the concept of 'grey water',** however customers are concerned about the cost and disruption involved in installation. A focus on new builds is seen as a logical place to begin in installing grey water. Customers are supportive of Anglian Water working in partnership with developers to do this. Customers feel that incentives will be needed to encourage installation in existing properties. They also feel that 'grey water' needs a name change and careful branding to build customer support.

What do the majority of insights suggest?

Providing a constant supply of clean drinking water is seen as fundamental for a water company. Customers raise the need to **not only maintain but improve and upgrade the current infrastructure and increase water storage to ensure continual supply**.

Satisfaction with performance on unplanned interruptions is relatively high, and most of these customers support maintaining, rather than improving, current service levels, with 97% saying they are satisfied with the reliability of supply.
We do, however, see customer valuations significantly increase over length of interruption and unplanned supply interruption with inconvenience regarding toilet use and personal hygiene seeming to be the driving factors which cause concern.
Focusing on drought restrictions, customers largely agree with hosepipe bans being necessary when water supplies are limited and during hot, dry weather which aligns with PR19 insight where, the majority of research suggested customers were satisfied with the current Level of Service for hosepipe bans and non-essential use bans and didn't see these restrictions as a priority area for investment. However, there is a proportion of customers (1 in 6 in one study) who feel the use of potential restrictions is unacceptable and insight from PR14 and PR19 demonstrated that customers would view the use of standpipes as a gross failure and completely unacceptable in a modern country like Britain. Generally, they felt that rota-cuts should be avoided, especially when they understood that schools and many businesses would need to close. When

looking at how to communicate regarding water restrictions direct, clear, and assertive communications are favoured.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Business customers – particularly those who rely on water may have stronger views.

Are there any insights which contradict the above?

The issue of supply interruption conflates two issues which can be difficult to unpick. Drought restrictions specific insight shows less of a priority than that seen when exploring unplanned interruptions – however, wider insight suggests planning for the long term is essential and a constant supply of clean drinking water is consistently the number one priority for customers. Unplanned interruptions seem to carry high valuation figures but, in other studies, customers appear satisfied with the level of service and wish more a ‘maintain’ investment plan rather than an ‘increase investment’ plan.

What do our stakeholders think?

There are no particular views expressed from stakeholders, but large supply interruptions do hit media headlines and can undermine trust in the company – it appears,however, to be more about the time to restore than the interruption itself that drives negative comments.

There’s a tension in stakeholder views on drought, in that for our environmental stakeholders the priority is protecting the environment and reducing demand, whilst other stakeholders are more focused on the need to support economic growth.

- There is an increasing concern from some regional stakeholders about our ability to support new non-household demand, given the impact of the EA’s abstraction reduction strategy, and the limited headroom we have in many parts of the region. T
- We frequently talk about our investments in resilience and, as a result, there is broad recognition from regional stakeholders around the need for our proposed new reservoirs.
- On a more tactical level, we also see some contradiction in stakeholder views on the implementation of TUBs, with stakeholders’ views moving between being critical of potentially implementing restrictions on customers, and also questioning why restrictions weren’t implemented sooner.

6.Disruptions – low pressure

Are we doing enough to reduce low pressure for our customers?

New Insights	Source	Score
86 % of surveyed customers satisfied with pressure	36	8

PR19 Key Messages (drawn from the AW PR19 report)
None.
What do the majority of insights suggest?
There seems to be a general satisfaction regarding low pressure, with 86% of customers surveyed saying they are satisfied.
Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)
Blocks of flats etc. may have particular problems or small pockets of customers.
Are there any insights which contradict the above?
No.
What do our stakeholders think?
None.

A flourishing environment

1.DWMP – flooding and blockages

How can we support customers regarding the issues around flooding – are we doing enough?

New Insights	Source	Score
Reducing leaks and **floods** - linked to eco-impacts and infrastructure upgrades, customers bring up several key points: tackle leaks to minimise water loss; **maintain sewers and educate customers on what not to put down toilets/drains** to keep pipes flowing freely and to prevent flooding, as well as sewage overflow.	6	10
Internal and external flooding were ranked in the highest importance category, along with supply interruptions and water quality.	11	11
Participants **reported a positive first interaction with water companies** – a good starting point. But the research found few positive examples after that initial communication. Companies' communication with customers is **often unsatisfactory**, with a lack of proactive updates, poor record-keeping, and poorly arranged visits. There were few instances of participants reporting a satisfactory resolution to an incident. Few participants reported receiving compensation from companies. Among the small number who did receive some compensation, there was a view that this was used to avoid dealing with the cause of the issue.	20	11
70% of customers surveyed satisfied with companies' actions to minimise flooding	36	8
The research found that when people experience sewer flooding inside or outside of their homes, the response by wastewater companies often makes this experience even worse. This was a consistent finding from participants across England and Wales.	46	10
Prevention and response are key: • Where possible, those at risk are warned when they are likely to flood. • Quick response to incidents, particularly when sewage is in people's home and there is a health risk. This includes an emergency response service for those at risk. • Customer vulnerability is assessed and people are signposted to mental health support services. • Transparency about the causes of incidents, sharing reports and information. • The cause of sewer flooding is fixed as quickly and efficiently as possible, provide clear timescales for when the cause of the flooding will be fixed	46	10
Clear contact and communication need to be in place: • Contact information is easy to find and people experiencing sewer flooding can quickly get in touch with their wastewater company. • There is a named or single point of contact who can support the customer from incident to resolution. • Good quality record keeping so that customers are not required to provide the same information repeatedly. • There is clear information on what the company will do in response to an incident and when to expect engineers or clean-up crews.	46	10

• A proactive approach to communication with customers – keeping them updated on progress and regularly checking in on customers to see how they are. • All those in contact with customers show empathy and understanding towards the situation and treat customers with respect.		
Clear process for compensation: • Clear information on, and payment of, compensation. • Good quality record keeping and data collection to ensure that customers automatically receive GSS for each and every incident of sewer flooding they experience that qualifies for a GSS payment. • An audit of GSS payments in relation to sewer flooding incidents, to ensure that, as a minimum, these payments have been, and are being, paid to all those eligible.	46	10

PR19 Key Messages (drawn from the AW PR19 report)

Evidence suggests customers are concerned about flooding. Some customers are confused about how scarcity can co-exist with flooding. Customers are **critical of house building in areas susceptible to flooding**. They are also less sympathetic to those who experience flooding after buying a property in a known flood risk area. PR14 stated preference research suggested internal flooding is viewed as worse than external flooding, and sewer flooding worse than water flooding. However, PR19 research suggests water flooding has a higher per incident impact on customer wellbeing than sewer flooding, and external sewer flooding a higher per incident impact than internal sewer flooding, as these incidents tend to **affect more people**. The impact of flooding on customer **wellbeing** is also higher in urban areas, as more people are affected. Of Anglian Water's seven water quality and customer satisfaction goals, **'zero pollutions and flooding' is rated as one of customers' top priorities**. Customers are generally supportive of a progressive surface water management strategy, and Anglian Water's goal to reduce unwanted water flow by 100%. However, some feel this is pushing more responsibilities on to customers to pay for improvements, the benefits may not be seen in their lifetimes, and more obvious solutions (such as clearing drains) should be tried first. **Customers are supportive of Sustainable Urban Drainage Systems (SuDs),** although they feel use of the acronym can be confusing. Some SuDs are seen as more practical for customers to install than others.

Research suggests that problems with the sewerage service are also **infrequent**, in particular for household customers. Satisfaction with the sewerage service appears to be slightly lower than for the water service, and lower among non-household than household customers. However, it is still high, and data suggests it has been increasing over the past few years. Sewer flooding (inside properties for households and in public places for non-household customers), blocked drains, odour (for households) and inability to flush toilets (for non-household customers) are among the most common problems. **Improvements to sewer flooding inside homes** and bathing water quality at beaches are priorities for both household and non-household customers. Overall, **improvements in waste services appear to be less important in customers' decisions** to support a package of service changes than improvements to the water service. The **majority of customers agree it is unacceptable to flush household/food waste down the toilet**, although there are differences by customer segment. Reactions to the sewerage rehabilitation strategy are positive; sharing the strategy helps customers understand the scale of the challenge and creates an impression of Anglian Water as a proactive company that is thinking ahead and trying to minimise disruption on customers' lives. In consultations on the draft PR19 plan, sewer collapses emerge as a priority issue.

What do the majority of insights suggest?

Customers feel **maintaining sewers** and **educating customers** on what not to put down toilets/drains to keep pipes flowing freely and to prevent flooding, as well as sewage overflow, **is important**. Internal and external flooding were ranked in the **highest importance** category, along with supply interruptions and water quality.

Some recent research with customers impacted by flooding, reports **good first interactions** but **poor follow-up and support**. PR19 research showed a mix of responses on whether internal or external flooding was more impactful – this may be due to the much lower frequency of internal flooding and is therefore currently difficult to gauge the priority between the two. There is a real drive from our stakeholders (CCW/ Ofwat) to do more in this space in terms of supporting customers. From prevention and understanding route cause, communication and support and quick compensations - stakeholders feel the bar needs to be raised.
Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)
Those who have experienced flooding.
Are there any insights which contradict the above?
There are a mix of views regarding the relative importance of internal flooding vs external flooding from PR19 research – this could be due to the lack of frequency of internal flooding.
What do our stakeholders think?
This is a top priority for stakeholders, particularly local authorities who are keen for AW to work in partnership with them to resolve issues. AW often sees comments alongside a concern about growth and the capacity/resilience of assets and infrastructure. People often ask about growth, assuming that without investment, flooding will become worse.

2.DWMP – pollutions

Should we aim to meet statutory targets for CSOs as set out in the Environment Act or go further and build an enhanced programme of river water quality improvements (including nutrient neutrality)?

New Insights	Source	Score
Pollution is starting to impact customers - or is at least coming to their attention through recent news articles.	6	10
Flooding and pollutions were ranked as third priority out of six for AW to concentrate on.	6	10
Customers have seen lakes or rivers (e.g., River Ouse) become unsafe to fish or swim in due to pollution; many are aware of the untreated sewage that has been dumped in waters around the UK.	6	10
62% of customers surveyed satisfied with company cleaning of wastewater before releasing it back into the environment (significant drop from last year)	36	8
The environment comes first. The environment is the number one concern when it comes to the implications of the different solutions for reducing pollutions. Customers are keen to see Anglian Water implementing processes and taking actions that benefit and safeguard wildlife and boost biodiversity across the region.	39	10

Utilise a variety of different solutions to reduce pollutions, touching on both green and grey where possible. Although the majority of customers prefer to support a long-term approach with the green solutions, ultimately there is an awareness that both a mixture of green and grey solutions will need to be used to tackle situations surrounding sewage and it's not a 'one size fits all' approach. Being up front about actions taking and why, centering comms on a balanced approach for the optimum outcome, will likely be well received.	39	10
Consideration for the future. Customers are thinking ahead with long-term effects/benefits in mind, and for this reason, green solutions are preferred by the majority. It may be impactful to contextualise the longer-term impacts of these solutions to give the customer the full picture on why Anglian Water are acting in a certain way. "We're doing this for future generations - your children, your children's children''.	39	10
Trying to cover as wide an area as possible when working to protect the environment is most important for over half of customers as this feels like the most equitable solution. Both bathing waters and rivers are seen as equally as important, therefore covering both of these will not only protect more of the environment and more water sources in less time but will ultimately benefit more customers whilst spreading the cost and resources of protecting the environment across the region.	40	10
Focusing on storm overflows which link directly to key rivers in the region is second most important, as doing so would protect river habitats and promote healthier river ecosystems therefore reducing negative impact on the environment. Furthermore, rivers in regions are often close in proximity to customer's houses and run through villages/cities posing a risk to their health, as such keeping rivers clean is seen to also positively impact customers' health directly.	40	10
Many customers struggle with prioritising what is important for short-term vs long-term investments when it comes to DWMP, as they consider all areas to be of equal importance. As such, some customers would like to see investments across multiple areas, rather than a fixed approach on what are considered the top priorities of today. With uncertain times ahead and the threats posed by climate change, all plans need to be adaptable to ensure money is being invested sensibly in areas where it's most needed at any given time.	40	10
When it comes to river pollution, untreated sewage from water companies is seen as the greatest cause of river pollution in the UK. With this in mind, it's important that Anglian Water clearly communicate their practice, and any initiatives they take when it comes to sewage disposal.	51	9
Ensuring that storm overflows provide healthy habitats for aquatic plants and animals is overwhelmingly the most important thing for customers when planning improvements. The research showed that customers overwhelmingly feel that humans are responsible for environmental damage, which is perhaps fueling the desire to prioritise the needs of wildlife over their own needs. Centering comms around 'what Anglian Water is doing to help our local wildlife' may be more effective at resonating with customers than initiatives focused around 'making the water cleaner for you'.	51	9
Storm overflows - some general damage control may be needed before customers can move on – there is a real lack in knowledge of what they are for - After a significant amount of bad press, many customers are caught up in the negatives of storm overflows. This is skewing their ability to see the bigger picture.	60	8

Need to manage expectations about what is achievable - The natural customer response is to wonder why Anglian Water aren't doing things quicker and to a greater extent (0 spills rather than 10, 100% improvement rather than 75%).	60	8
Need to provide context and explanation to build trust - Customers are concerned about how achievements and impact are measured. Terms such as 'ecological impact' feel subjective, and there is a worry that Anglian Water will use this to their advantage.	60	8
Anglian Water need to get the balance right between focusing more effort on educating customers on the benefits of grey solutions, whilst in the same breath, providing evidence for the work that's underway to implement and action more green solutions.	60	8
When looking at the visulisation tool for river water quality mapping 42% find the map content easy to understand, vs 37% that found it difficult.	61	9
The ideal tool would be one that provides a local view from the get-go, by typing in a postcode and the map auto-zooming to that area. To start with, only top-level data (water quality, sewage leaks) would be visible, then the map would allow the user to build up and swap out content only if they wish to. An auto-tutorial or short tutorial video may also have a positive impact on UX. It's also essential that the tool is fully mobile-optimised.	61	9
Customers also want up-to-date, ideally real-time, information. Some notice that the data is not up-to-date and don't respond well to this, as they aren't sure how useful it is. The ultimate tool would show data from now and the recent past, but also highlight what's in the pipeline (work AW is doing, improvements being made etc.)	61	9
Customers want to see AW being more up-front and honest about the negatives, flagging sewage/pollution leaks with supporting information on severity level and how this is being managed.	61	9
The majority of the public place trust in their water companies to provide good quality of water and provide a reliable service. Yet only a third trust their water company to prevent sewage from entering rivers or seas. Over time, trust has fallen in water companies' abilities to perform a range of responsibilities, including ensuring good quality drinking water and providing a reliable service.	62	13
Views on water companies' impact on the environment are more mixed. The sector is seen as more environmentally conscious than other comparator industries (banks, supermarkets and energy companies). Two in five are confident that water companies are acting to improve river water quality. There is, however, a disparity in what customers feel they can currently do and should be able to do safely in rivers in England and Wales.	62	13
Around half of customers surveyed are familiar with the recent bad press on the sector's performance and behaviour. It leaves people feeling angry, upset and anxious. Half say that the coverage has reduced their trust in the sector.	62	13
Customers feel that Anglian Water are already doing their utmost to protect the environment, one thing that they could do more is to educate individuals about what they can do to protect the environment too, for example by visiting schools and running workshops.	85	9
Generally, customers do believe that the proposed plans will make a positive impact on the environment, the combination of the sensible timelines and well laid out actions to achieve them. Customers do want to be kept up to date with how the plans are going to ensure they are being carried out and will generally have a positive effect, some would	85	9

prefer to wait until they've seen evidence before deciding on whether it's had a positive impact or not.		
Water firms are being heavily criticised for 'sewerage spills' as there has been abuse of the regulations within the water industry. Featured in documentaries, Panorama, radio, and heavily in the media, it's now being seen consistently across different channels and even as comments/interactions on individual water companies' social media platforms. Water firms seen to 'secure profits' rather than think about the environment. This topic seems to be the main narrative when talking about improving or caring for rivers. Sewerage pollution is a very emotive and is having a notable, negative effect on public opinion.	98	8
After a significant volume of bad press, many customers are caught up in the negatives of storm overflows, skewing their ability to see the bigger picture. Water companies need to continue to share comms on why storm overflows are used, really highlighting how rainfall and flooding is managed in the region. Worth noting that the cost of improving storm overflows would cost around £300 billion. Water companies need to use clear and consistent messaging to describe storm overflows. The technical language implies we're 'hiding' something. If we are more transparent, we would manage expectations better. AW need to be sharing stats and keep customers updated with performance targets. Sharing our measurements of success, perhaps even comparing where we are against other water companies and frequently mentioning what we're doing to hit DEFRA targets. The reason why is not always considered to be a good enough reason, but sharing what is considered 'OK' and the impact on the environment will help change perceptions. When using stats we need to consider the context.	98	8
•42% use water recreationally. The most popular locations for recreational water use are beaches (28%) and rivers (21%). Lakes and reservoirs are used by <10%. •Rivers are used mainly for boating, including canoeing and kayaking, although activities such as swimming, SUP, and angling are also common. •Coastal water is used mainly for swimming and paddling, and many enjoy just 'spending time by the sea'. •A notable number of customers cite walking by the water (riverbanks, coastal paths) as a recreational water-based activity. This indicates that water quality might not only be important for those that are getting into the water, but also those just spending time in its vicinity.	102	7
72% of customers feel it's important that river water is of good quality when used for recreational purposes. Those that feel it's not so important are mainly those who don't currently interact with water recreationally. Those in the highly important camp (41%) have serious concerns about risk to health, for themselves (many are swimmers), but also for wildlife. They are worried about infection, disease, and negative impact on biodiversity.	102	7
After a significant amount of bad press, many customers are caught up in the negatives of storm overflows. This is skewing their ability to see the bigger picture.	104	9

Anglian Water could share comms on why storm overflows are used, really highlighting the importance of these in how rainfall and flooding is managed in the region. More transparency could also improve perceptions; at the moment, it feels like a 'dirty secret' that is kept from customers.		
The natural customer response is to wonder why Anglian Water aren't doing things quicker and to a greater extent (0 spills rather than 10, 100% improvement rather than 75%). If these opinions go unmanaged, there is a risk that any work done is nullified by an overarching perception of "not enough!" More needs to be done to educate customers on what's actually possible, and to prove Anglian Water are doing everything that they can to meet and surpass targets.	104	9
Regarding the Get River Positive map – customers want a much more top-level overview that focuses on their local area from the get-go. They need more clarity on what this map is meant to be showing. It's also essential that the tool is fully mobile and optimised. Using a more universal, customer friendly 'key' would likely be well-received. Customers want to see AW being more upfront and honest about the negatives.	105	7

PR19 Key Messages (drawn from the AW PR19 report)

PR19 research confirms there is **concern about the impact of pollution on human health and the ecosystem**. Most research suggests customers are supportive of attempts to **protect water quality at source** and think major polluters should do more to reduce pollution. While some research suggests customers spontaneously tend to focus on treatment rather than prevention, hearing about the costs of treatment and programmes that have been successful in changing polluters' behaviour helps to convince those who are initially more sceptical. **Views about polluters and how best to tackle pollution vary**. For example, some customers favour incentivising farmers and other polluters to reduce pollution, while others are strongly against this. Some customers favour increased legislative controls, while others reject this. PR19 research suggests there **may be systematic differences between groups of customers** in their viewpoints on the topic of river water quality. Preventing pollution and protecting local water bodies are key customer concerns. Problems are infrequent, and **most customers are broadly satisfied with the quality of local rivers and performance on pollution incidents**. However, satisfaction is lower than for other attributes, and these areas (along with bathing water quality) are clear customer priorities for improvement. **Zero pollutions and flooding are seen as the second most important of Anglian Water's seven water quality and customer satisfaction goals.** Evidence suggests customers view rivers as more than just local water bodies; they are also **valued as a place for relaxation and wellbeing**. Customers view river management as a shared responsibility between government, the Environment Agency, local businesses (including the water company), local authorities and customers. **Some (limited) evidence suggests customers want Anglian Water to go beyond** a focus on meeting current chemical standards for river water, to facilitate improvements in aesthetic quality and public use and enjoyment of rivers.

What do the majority of insights suggest?

There is much more awareness of pollutions through recent media attention – customers views are mixed but some report anger and feeling upset and anxious regarding recent media reporting. Flooding and pollutions were ranked as third priority out of six for AW to concentrate on and river water quality has the second highest valuation of those tested. The environment is the number one concern when it comes to the implications of the different solutions for reducing pollutions. Customers are keen to see Anglian Water implementing processes and taking actions that benefit and safeguard wildlife and boost biodiversity across the region and they view rivers and bathing waters equally. There are also concerns regarding recreational use and water quality. When looking for solutions to reduce pollutions, customers want green solutions that look to address issues across multiple areas but they struggle to prioritise the short term vs the long term in this area although there are some indications that customers don't. There does seem to be a desire for more real time information and a need to educate and inform in an honest and transparent way.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

PR19 research suggests there are a difference of views, especially regarding the options for solutions. We would expect views of local river groups to be stronger than the wider customer base.

Are there any insights which contradict the above?

Historically, there is a mix of views on the best solution to resolve.

What do our stakeholders think?

With recent media attention, there is a strong narrative from Ofwat, environmental regulators and local river /NGOs that this is a priority area for investment. In the DWMP consultation, 5 out of 9 stakeholders were somewhat confident in proposed plans. They had a mixed response regarding areas on which to focus (rivers, bathing or other) with 3 out of 9 having a preference for nature-based solutions. More generally, this remains a key priority for stakeholders and is the topic we hear most about from them, be it scrutiny committees or MP's emails from constituents. This also extends beyond river water quality, into a focus on coastal waters and the link between bathing water quality and tourism.

The issue has become highly political ahead of the upcoming general election amongst our political stakeholders, to the extent that constructive dialogue about policy is only happening behind closed doors now. There is broad agreement across stakeholders around the need to act on river water quality and most stakeholders want to see action taken much faster than is currently planned (for example, Labour are proposing legally binding targets to end 90% of all sewage discharges by 2030). However, there is some recognition (especially by Conservative politicians) of the cost implications of attempting to move faster.

3.WINEP - sustainable abstractions

Do customers prioritise improvements that are more local to them or those that have a wider impact across the region?

New Insights	Source	Score
Customers explored the timing of environmental targets - 42% feel **environmental targets should be achieved sooner than 2050** (vs 21% for non-billpayers).	1	15
Three scenarios representing environmental ambition were explored - 44% of household (HH) customers would **prioritise the medium/middle scenario of 'restore and improve'** (51% among non-HH chose the medium scenario).	1	15

Achieving the environmental targets by 2050 is a **more pressing concern than drought resilience** –but less so for non-billpayers. 42% feel it would be too late (vs 21% for non-billpayers). In comparison, 18% overall felt achieving drought resilience by 2039 is too late.	1	15
Most respondents feel the environmental ambition targets regarding water abstraction should be **achieved by 2030, or 2040** at the latest.	1	15
Improving the environment is seen as **crucial for the future of the planet,** with this group feeling that, if the environment isn't 'helped', other factors won't matter.	2	10
They raise the need to not only maintain but **improve and upgrade the current infrastructure** and increase water storage, to ensure continual supply and reduce environmental impacts.	6	11
Environmental/educational focus - the **environment came up repeatedly in customers' priorities.**	6	11
Customers are aware that to protect and maintain the environment **bill increases may be necessary**, and, overall, see this as a priority. If customers are made aware of the benefits of the work Anglian Water are carrying out and any efforts being made to reduce financial impact on the customer, they may be more open to potential bill increases.	7	10
Customers want action (on environmental ambition) to be made **sooner rather than later**. They are aware that the longer action is not taken, the worse off the environment is. There is a perception that waiting could result in higher costs due to inflation, and more damage occurring in that time. When asked to consider the rest of society and future generations, the desire to act with urgency grows. Lack of **financial security and general volatility leaves some feeling that they don't know what the best option is**. The result is that many find themselves sitting on the fence and choosing a middle option as a 'happy medium'.	7	10
There is an **even split on opinions of when to act when it comes to improving water supply and demand**. The most important considerations for customers include the **lowest impact on the environment** and reassurance that the company has a plan in place rather than reacting with a knee jerk reaction.	12	13
Customers expect that the long-term plan to **secure water supplies and improve resilience** of the water system to drought and unexpected events are not at the expense of the environment.	18	14
The principle of a 'best value plan' (not the cheapest, but the best for society and the environment) wins approval. However, consumers want AW to prioritise the core business activities (which includes **protection of the environment**, managing flood risk and **drought resilience**) over the 'added value' elements (boosting the local economy, consulting customers, and creating public amenities, etc.).	24	14
Stakeholders believe the size of the challenge requires actions from beyond the water companies. **Collaboration means being part of the delivery too** – and they want to see (and be part of) more creative solutions to address the problem.	24	14
Environmental ambition is important – but **not at any cost** for the general public and non-household customers. **Restoring past damage is supported,** but **cost implications** of improving environments means few support the highest 'destination'. **Stakeholders with an environmental remit do support the highest destination**, however.	24	14
The pace of achieving our environmental destination - **urgency is key for stakeholders** but less so for the general public/NHH. Consumers do not see the argument for exceeding	24	14

statutory timeframes. Stakeholders are much more urgent about the need for action – **but there is no consensus on the optimum timeframes.**		
Stakeholders challenge the regulatory approach: 5-year cycles promote short-termism; pressure on bills hampers the ability to do the 'right' thing.	24	14
Customers and citizens want Water Resources North (WReN) companies to protect what they have in terms of the environment, and once that protection is in place to **improve what is there through Biodiversity Net Gain**. Customers and citizens in this qualitative exercise are prepared to pay a small amount more to achieve this, however, this support would need further quantification.	25	10
There is widespread approval of the **Environmental Ambition** and most want water companies to be ambitious and deliver enhanced protection for the environment, to support nature recovery and **achieve sustainable abstraction**. The top three metrics across the workshops are leakage, PWS drought resilience and financial cost. Environmental considerations are ranked after this.	25	10
A key area to prioritise in the WRMP is - Keeping as much water in sensitive areas of the environment as possible	31	15
Avoiding displacing biodiversity as much as possible when water resources planning	31	15
Keeping the amount of carbon produced to build and operate the plan as low as possible	31	15
Ensuring a moderate bill impact (an average cost between £4.40-£4.60 per month over the next 25 years) was an acceptable option for customers	31	15
In the WRE regional synthesis, the environment was a top priority for most (especially Cambridge and Anglian customers). Most HH customers wanted restoration of natural water sources. Cambridge and Essex & Suffolk customers typically want this done sooner than others. Environmental sector stakeholders wanted to go beyond improving water resources, to ensure maximum environmental protection. Views varied when customers answered questions as customers vs citizens. For example, when a question was framed at a collective, societal level, Anglian customers were more willing to restore natural water resources sooner (before 2040) compared to when responding on a personal level.	121	11
PR19 Key Messages (drawn from the AW PR19 report)		
Most customers support further investment in resilience to ensure there is spare capacity in the system to deal with problems like extreme floods, power outages, and long periods of drought. Customers generally support going beyond minimum levels of investment to protect water supplies for the future. They also generally support investing in and paying for improvements sooner rather than later. However, some customers are reluctant to pay more themselves to protect future customers; there is evidence of differences in opinion across customer groups and segments in this regard. Accepting a price rise is often dependent on Anglian Water helping customers to save water, doing everything it can to reduce its own use, and investing in the water supply. Customers generally trust Anglian Water to choose the most cost-effective mix of solutions. However, evidence suggests customers prefer options that avoid perceived waste (leakage reduction, recycling/reusing treated wastewater) and promote efficiency (water saving devices), as well as a couple of new water resource options (storing water underground and extending existing reservoirs). Customers also prefer options that are more reliable. Severe water restrictions are one of the most unwanted service failures and customers are willing to pay to prevent these. Awareness is lower for severe restrictions, particularly among household customers; some were shocked that having no tap water was even a possibility in a country with so much rainfall. While some customers support a reduction in service levels, in general, both household and non-household customers support maintenance of current service levels for hosepipe and non-essential use bans. Both household and non-household customers have strong preferences for avoiding deterioration and for improvements to levels of service for no tap water. Non-household customers also have strong preferences for avoiding deterioration and for improvements to levels of service for		

rota cuts. Customers think that more severe restrictions should be imposed for the minimum length of time possible. Discussion of serious water restrictions led customers to question whether Anglian Water is doing everything it can to save water and manage the infrastructure effectively. Although, overall, Hartlepool Water customers' priorities are aligned to those for the wider Anglian Water region, severe water restrictions have a noticeably reduced level of importance for these customers. The company's draft PR19 goals to reduce severe restrictions to zero by 2025 are well-received, and targets in the plan are regarded as sufficiently stretching.

What do the majority of insights suggest?

Achieving the environmental ambition targets planned by AW is seen as crucial for the future of the planet with a view that, without helping the environment, other factors won't matter; with real support for nature recovery and to achieve sustainable abstraction. Customers also view that plans should minimise carbon impact and avoid displacing biodiversity, while keeping as much water in sensitive areas and seeing restoration of natural water sources – and when these are considered with a citizen lens customers want to see delivery sooner.

When presented with the timings and options around those ambitions, most customers opted for the medium scenario of 'restore and improve', which seems to be driven by financial security and concerns over affordability. However, a moderate bill impact (£4.40-£4.60) over the next 25 years was considered acceptable. Most customers feel these ambitions should be achieved between 2030 to 2040 – so sooner than the 2050 target, but there are variations between customer segments and a desire for robust planning to be in place.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Stakeholders (and particularly those with an environmental remit) have a stronger view than customers overall. They articulate an urgency for delivery and generally support the highest destination explored. They call for more collaboration as part of the delivery of these ambitions and are critical of the 5-year planning cycle, which they feel hampers the ability to progress this area at pace.

Are there any insights which contradict the above?

Non-household customers in general agree with household customers but they are slightly more supportive of the medium destination (51% compared to 44%). Future customers seem less concerned about the pace of achieving environmental targets with only 21% feeling they should be delivered sooner, compared to 42% of the wider group.

What do our stakeholders think?

Detailed requirements set out under WRMP and WINEP guidance by EA. Major support from local river groups to protect chalk streams and wider environment around rivers.

4.WINEP - Wider environmental impact including biodiversity

Do customers want to see action to meet environmental targets to be achieved sooner than 2050? Is this still the case when they understand that to protect and maintain the environment, bill increases may be necessary?

New Insights	Source	Score
Improving **river quality** was ranked number four in Anglian Water consumers' priorities and, although lower than other priorities, it was substantially above average.	19	13
Customers and citizens wanted WReN companies to protect what they had in terms of the environment, and once that protection was in place **to improve what was there through Biodiversity Net Gain**. Customers and citizens in this qualitative exercise were **prepared to pay a small amount more to achieve this**, however, this support would need further quantification.	25	9
Positioning Anglian Water as a brand at **the forefront of sustainability** and serving the wider community (Corporate Social Responsibility or CSR) is crucial to elevate the role of the brand.	21	10
Sustainability and Good Company are growing in importance for C-MeX and are areas that can be used to build trust.	23	10
The top-three most highly valued project additions to large Strategic Water Resource infrastructure by households were:' **Specialist habitats** created for wildlife' (£3.87 annually, on average)'New **wetland** area' (£3.24 annually, on average) 'Space provided for **sustainable agriculture**' (£2.61 annually, on average)	30,52,54, 54	15
The biggest variation in view on added value for these large infrastructure projects in the qualitative work was by infrastructure project type. This is consistent with the quantitative work where valuations of **project additions differ considerably across different types of sites and by distance,** while the extent of variation across different companies is small.	30,52,54, 54	15
In the quantitative work on these large infrastructure projects, overall, project additions at water treatment works were valued most highly, followed by reservoirs, canals, and pipelines. This could be due to reservoirs/canals being naturally more positive/pleasant however qualitatively, people felt that the social project additions at water treatment works would be less valuable as they would be unlikely to want to visit but **environmental and economic benefits** were supported.	30,52,54, 54	15
The WTP for a 'package' of project additions with a large infrastructure project was lower than the sum over individual project additions, indicating that that **capping may be needed for individual project additions** to ensure that total WTP is not exceeded.	30,52,54, 54	15
When water resources planning avoiding displacing biodiversity as much as possible	31	14
94% of the participants at the community ambassador events felt investing in water recycling centers, pumping and sewers was a priority to **improve (river) water quality**	35	6

Most customers see issues surrounding the atmosphere and climate, fueled by pollution and general actions of humankind, as the biggest threat to the environment in the UK currently. Plastic contamination is also considered a significant threat.	39	8
94% of customers surveyed thought Anglian Water should carry out trials on new and emerging chemicals and microplastics to see if they can be prevented and/or removed from entering the sewage network during treatment processes although only 59% were happy to support a bill increase associated with this,	63	9
33% of customers surveyed thought it important is it to you to have real-time water quality information about your local river with only 23% happy to support a bill increase with this.	63	9
When ranking 'Resilience to flooding and drought' was highest priority for customers followed by 'Enhancement of the natural environment, biodiversity and habitats', Achieving net zero and lastly 'Improving access to the natural environment'	63	9
Anglian Water should address customers' concerns by providing clarity and transparency about the A-WINEP plan, the Partnership of Excellence, and the trial in Norfolk and Southend. Clear customer-friendly explanations of tangible processes, costs, benefits, and funding sources are crucial to avoid scepticism and encourage customer support.	113	9
Customers want to see additional benefits in their regions sooner rather than later, while most agree that a pilot approach is a good idea to establish best practice, support is lost on the idea that it won't be implemented to wider regions until after 2035. Given there is an appetite to pay a little more (e.g., 50p - £12 a year), AW should consider charging more to speed up the process.	113	9
The majority of customers are open to an increase in their bills if it means greater benefits for themselves and the environment, such as improved water quality and biodiversity. Highlighting the positive impact of the A-WINEP plan and showcasing the benefits of nature-first solutions will help to leverage eco-friendly and health-conscious attitudes and boost support.	113	9
PR19 Key Messages (drawn from the AW PR19 report)		
Environmental protection is considered an important aspect of Anglian Water's work. Evidence suggests interest in, and concern about, the environment is growing. However, it remains important to show customers how environmental issues may affect their own lives and give them confidence that individual efforts to protect the environment can make a difference. Willingness to Pay evidence suggests **customers prioritise improvements that have a wider impact across the region** (including river water quality and pollution, as well as leaks), and that they have **strong preferences for avoiding deterioration** in service levels, especially in relation to environmental outcomes (as well as aspects of the service that have a high and direct impact on customers, e.g., internal sewer flooding). When considering the added benefits to large infrastructure schemes customers value both **environmental and economic benefits** with specialist habitats created for wildlife' (£3.87 annually, on average)'New wetland area' (£3.24 annually, on average) 'space provided for sustainable agriculture' (£2.61 annually, on average) scoring most highly. Evidence suggests **most customers think Anglian Water cares about the environment**, but awareness of the company's environmental and community activities is low. Raising awareness of these activities boosts positive perceptions of the company. There is support for		

the company's plans to reduce the negative impact of its operations on the environment and to work with others to achieve wider change. Draft PR19 plans to develop a 'balance sheet' to measure company impact on the environment are very well received. **Available evidence suggests customers buy-into natural capital solutions**; these are regarded as a positive approach to water treatment and a 'win-win' in terms of compliance, cost and environmental protection.

After affordability, **a desire to protect the environment was one of the key reasons given for supporting a package of service improvements** in some PR19 research. However, there appear to be differences between segments in the extent to which customers say they make environmentally friendly choices in their everyday lives. **There are also differences between segments in views about how finances should be raised to protect the environment**. However, overall, slightly more customers think finances should be raised through the water bill than via income tax.

What do the majority of insights suggest?

The majority of insight shows that **environmental protection is considered an important** aspect of Anglian Water's work. **Customers seem to prioritise improvements that have a wider impact across the region** (including river water quality) and they have **strong preferences for avoiding deterioration.** Improving **river quality** was **ranked number four** in Anglian Water consumers' PR24 priorities and, although lower than other priorities, it was substantially above average.

In one study, the majority of customers were open to an increase in their bills if it meant greater benefits for themselves and the environment, such as improved water quality and biodiversity. Highlighting the positive impact of the plan and showcasing the benefits of nature-first solutions will help to **leverage eco-friendly** and health-conscious attitudes and boost support.

AW is being seen at the forefront of **sustainability** and serving the wider community (CSR) is crucial to elevate the **role of the brand**. Wider environmental issues such as emerging substances and microplastics were supported by customers for investigation, and there is some support (33%) to have real-time quality data available.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Environmentally focused stakeholders and local river groups may have stronger preferences in this area.

Are there any insights which contradict the above?

The contradiction seems to be more about **who pays** for improvements rather than the need for them.

What do our stakeholders think?

There is wide support from local river groups and environmental NGOs to improve and increase wider environmental benefit. There is widespread support from stakeholders for AW delivering nature-based solutions and work to mitigate climate change. However, there is also a remaining tension in the expectations of some stakeholders (particularly Government and regulators) in that there is still a focus on output-based measures which are easier to regulate, but which aren't easily compatible with nature-based solutions.

5. Biosolids and renewable energy

Is there support to focus on nature-based or green solutions that benefit the environment and switch to more sustainable sources of energy?

New Insights	Source	Score
Positioning Anglian Water as a brand at the **forefront of sustainability** and serving the wider community (CSR) is crucial to elevate the role of the brand.	21	11
Sustainability and 'good company' are **growing in importance** for C-MeX and are areas that can be used to build trust.	23	12
Developing **nature-based solutions** such as wetlands to combat climate change scored seventh in terms of PR24 priorities.	19	14
PR19 Key Messages (drawn from the AW PR19 report)		
Customers are keen for Anglian Water to reduce waste from its processes and switch to more sustainable sources of energy. Evidence suggests there is very **limited awareness of biosolids**, or the company's role in their production. **Support for biosolids seems to be mixed**. Some research suggests customers regard production of biosolids as a much more environmentally-friendly option for dealing with waste than incineration, landfill, or dumping at sea, and a more natural way of fertilising land than use of chemical pesticides. **Other research suggests customers are concerned about the use of biosolids on land**. Confidence in, and acceptance of, biosolids centres on the quality and safety of the product. There are some concerns that the privatisation of the market in biosolids may lead to a decline in quality. **Customers are increasingly concerned about plastic waste**, and the potential for this to infiltrate the environment and food chain. However, most do not spontaneously make a connection between the processing of wastewater and microplastics. Learning more about this increases expectations on Anglian Water to protect the water supply. However, in general, **customers regard tackling plastic waste as a shared responsibility** between consumers, industry and government. Available evidence suggests most customers accept transportation of sludge as a 'necessary evil'. While some customers feel strongly that **road transportation is not the best option**, most customers do eventually agree to this, however they are keen for Anglian Water to continue to explore solutions that achieve the best balance between cost and environmental impact. Customers are **supportive of Anglian Water's plans to create a 'greener' vehicle fleet**. However even the strongest supporters are mindful of the impact on customer bills. As the electric car industry is new, these cars currently have limited range, and there are still few charging points available; some customers advocate trialing new types of vehicles in the first instance, rather than 'jumping on the bandwagon' right away.		
What do the majority of insights suggest?		
Sustainability is seen as a key factor in influencing customer satisfaction. Customers are keen for Anglian Water to **reduce waste** from its processes and switch to more **sustainable sources of energy**. They are also keen to see **nature-based solutions** used to combat climate change (scoring it seventh in a list of 18 priorities for PR24). Evidence suggests there is very **limited awareness of biosolids**, or the company's role in their production. Customers are **increasingly concerned about plastic waste**, and the potential for this to infiltrate the environment and food chain. However, most do not spontaneously make a connection between the processing of wastewater and microplastics. Learning more about this increases expectations on Anglian		

Water to protect the water supply. However, in general, customers **regard tackling plastic waste as a shared responsibility** between consumers, industry, and government. Customers are **supportive of Anglian Water's plans to create a 'greener' vehicle fleet**. However, even the strongest supporters are mindful of the impact on customers' bills.

Are there any groups we need to pay particular attention to? (e.g., would one group be disproportionately impacted?)

Environmental stakeholders.

Are there any insights which contradict the above?

Support for biosolids seems to be mixed. Some research suggests customers regard production of biosolids as a much more environmentally friendly option for dealing with waste than incineration, landfill, or dumping at sea, and a more natural way of fertilising land than using chemical pesticides. Other research suggests customers are concerned about the use of biosolids on land.

What do our stakeholders think?

No particular views.

Sources

Reference	Source	Supplier	Areas covered	Participants	Methodology	Methodology Score	Rigorously gathered	Credible analysis	Contributary evidence	Depth of engagement
1	WRMP – Quantitative Survey March 2022	Emotional logic	Drought resilience Supply & demand options Environmental Scenarios (WRMP) Best Value Planning	Online survey 1489 HH NHH Future customers Supplemented with 250 walk-ins	Survey – supplemented with video materials	3	3	3	WRMP driven	3
2	Online community - Best Value	Incling	WRMP	120 participants Spread of age and gender Representation from all 6 customer segments Geographical spread	Online community	2	1	2	WRMP driven	2
3	Online community – Leakage	Incling	Demand management	118 customers	Online community	2	1	2	WRMP driven	2
4	Online community – Demand	Incling	Demand management	122 customers	Online community	2	1	2	WRMP driven	2
5	Online community – Metering	Incling	Demand management	145 customers	Online community	2	1	2	WRMP driven	2
6	Online community – PR24 & WRMP Priorities	Incling	Priorities	180 customers for PR24 220 for WRMP – reconvened over several weeks	Online community	2	2	2	PR24 & WRMP driven	2
7	Online community - Environmental Ambition	Incling	WRMP Environmental Ambition	221 customers	Online community	2	1	2	WRMP	2
8	Online community – WRMP Options & Drought	Incling	WRMP Options	180 Customers	Online community	2	1	2	WRMP options	2
9	WRE – optimal regional approach to delivering a 'best value' plan to ensure long term security of	Blue Marble	Best value - WRMP	85 HH customers 14 NHH	Qualitative reconvened groups followed by deliberative group	3	2	3	Best value &WRMP	3

	supply (September 2021)			20 organisations and 24 individuals - stakeholders	depth interviews with NHH					
10	WReN – Water Resources	Turquoise	Best value metrics Water supply options Regional planning / water trading Plan alignment	16 – reconvened workshops (HH and NHH) no numbers of customer given	Deliberative reconvened workshops (reconvened once)	3	1	1	WRMP options and best value metrics – but not Anglian customers	2
11	Ofwat & CCW Customer Preferences Research April 2022	Yonder	Customer Preferences	12 focus groups (36 HH) and 16 depth interviews NHH and hard to reach	Deliberative focus groups with added depth interviews	3	2	2	Preferences	2
12	WRE NHH Water Efficiency (Phase 1) Jan 2022	Blue Marble	Water Efficiency	9 depth interviews with retailers	Depth interviews	3	2	3	WRMP – Demand Management	2
13	WRE NHH Water Efficiency (Phase 2) April 2022	Blue Marble	water Efficiency	4 roundtables with retailers and wholesalers	Round table deliberative	3	2	3	WRMP – Demand Management	2
14	Online community – desalination and reuse	Incling	WRMP Options	183 customers	Online community	2	1	2	WRMP options	2
15	Part A – Customer Preferences to inform long-term water resources planning	Eftec	WRMP Options / SROs and Regional Planning	n/a	Literature review	n/a	n/a	n/a	WRMP options/ SROs	n/a
16	Part B – Customer Preferences to inform long-term water resources planning	Eftec / ICS	WRMP Options / SROs and Regional Planning	84 customers (across 10 company areas)	deliberative focus groups (online)	3	2	3	WRMP options/ SROs	3
17	Part C-– Customer Preferences to inform long-term water resources planning	Eftec	WRMP Options / SROs and Regional Planning	2,300 household customers and 350 non-household (across WRSE companies – not Anglian)	Quantitative	3	3	3	WRMP options/ SROs	1

18	Summary report - – Customer Preferences to inform long-term water resources planning	Eftec	WRMP Options / SROs and Regional Planning	Summary of A, B &C reports	Review	3	3	3	WRMP options/ SROs	2
19	PR24 Priorities May 2022 – *further sections to this work expected*	Trinity McQueen	Priorities Scale Investment Pace	843 customers	Online - quantitative	3	3	3	Priorities	3
20	Ofwat & CCW report – Sewage in homes	Britain Thinks	Sewer flooding	50 household customers recently impacted by flooding	Qualitative interviews	3	2	2	Sewer Flooding	2
21	Brand Structures Analysis April 2021	Kantar Analytics	Brand / CMeX	tbc	Survey	3	2	3	Wider Brand	1
22	State of the Nation survey Feb 2022	56 Degree Insight	General	402 customers	Interviews	3	2	3	General	1
23	Brand Structures Analysis March 2022	Kantar Analytics	Brand / CMeX	2060 respondents Measured across four waves: April/August/November 2021, February 2022	Survey	3	3	3	Wider Brand	1
24	Online community – WRMP Preferred Plan	Incling	WRMP	128 customers	Online community	2	1	2	WRMP	2
25	WRE – promoting water efficiency amongst Non Household customers (Phase 3)	Blue Marble	Water Efficiency	26 NHH customers	Depth interviews	3	2	3	WRMP – Demand Management	2
26	Water Club – Communications framework for a change in Water Source	Britain Thinks	WRMP	96 customers and 36 NHH for qualitative 1762 customers and 198 NHH for quantitative (note across 11 SRO regions)	Evidence review Qualitative (Product testing and deliberative all day events) Quantitative survey	3	3	3	WRMP – SROs and changing water sources	3
27	Online community – supporting customers in vulnerable circumstances July 2022	Incling	Affordability and vulnerability	153 Customers	Online community	2	1	2	Vulnerability	2

28	Retailer priorities	UK Water Retailer Council	Retailer priorities	Workshop with Ofwat, MOSL, CCW & Wholesalers	Workshop/ report	1	1	1	Retailer priorities	1
29	Price fairness March 2021	Incling	Affordability	127 customers	Online community	2	1	2	Affordability	2
30	Customer preferences on added value for large resource schemes	Accent	WRMP	Qualitative - 24 reconvened groups covering HH, NHH and future Quantitative 5902 HH and 553 NHH	Qualitative reconvened groups Quantitative survey	3	3	3	Public value	3
31	WRMP24 Preferred Plan Aug 22	Trinity McQueen	WRMP	Quantitative 796HH and 80NHH	Quantitative	3	3	3	WRMP	3
32	BAU – customer priorities	Anglian Water	Customer priorities	118 customers	Unknown	1	1	2	Priorities	1
33	Knowledge hub October 22	Incling	General	48 customers	Online community	1	1	2	General	2
34	Ofgem price cap – August 2022	Accent	Energy	Unclear	Unclear	1	1	1	Energy	2
35	Community Ambassador events March-Oct 2022	Anglian Water	Smart Metering Surface Water Management Climate Change Agriculture CaBA Biodiversity Coast Plastics Priority Service Register	Between 47 and 220 across the topics. Short in person surveys at community events	In- person survey	1	1	1	General	2
36	Water Matters 2020-21 Customer satisfaction	CCW	Customer satisfaction	Between 60 and 351 , age range and SEG – good representation	Telephone research with sample for non-telephone users.	2	1	2	Satisfaction	2
37	CES mirror survey Sept 2022	56 Degree insight	Customer satisfaction	Online 405 Anglian customers (1222 across 5 companies) 49 Offline (231 across 5 companies)	Online CATI & CAPI	3	3	2	Satisfaction	2
38	Customer Investment Priorities (Wave 3) November 2022	Trinity McQueen	Customer Priorities	529 customers	Online &face to face quantitative	3	3	3	Priorities & investment	3
39	DWMP September 2022	Incling	DWMP	145 customers	Online community	2	1	2	DWMP	2
40	DWMP July 2022	Incling	DWMP	170 customers	Online community	2	1	2	DWMP	2
41	Drought communications August 2022	Incling	Drought	135 customers	Online community	2	1	2	Drought	2
42	Engagement Strategy Oct 2022	Incling	Engagement	32	Online community (Knowledge hub)	1	1	2	Engagement	2
43	Hard Water June 2022	Incling	Hard Water	200	Online community	2	1	2	Hard Water	2

44	R-Mex August 2022	MOSL	R-Mex	13 Retailers	unknown	2	2	1	R-Mex	2
45	Drought communication (seasonal demand) June 2022	Incling	Drought	170 customers	Online community	2	1	2	Drought	2
46	Customer Experience of sewer flooding Jan-March 2022	CCW / Ofwat	Flooding	50 (interviews) , 26 workshop participants (not Anglian specific)	Interviews & workshops	2	1	2	Flooding	2
49	Water Saving September 2021	Incling	Water Saving	172 customers	Online community	2	1	2	Water Saving	2
50	Water Matters 2021	CCW	General	-	Stakeholder	-	-	-	General	-
51	River Quality December 2021	Incling	River water quality	240 customers	Online community	2	1	2	River WQ and environment	2
52	Customer preferences on added value for large resource schemes Final Report - Anglian to Affinity Transfer version November 2022	Accent	WRMP	Qualitative - 24 reconvened groups covering HH, NHH and future Quantitative 5902 HH and 553 NHH	Qualitative reconvened groups Quantitative survey	3	3	3	Public value	3
53	Customer preferences on added value for large resource schemes Final Report - South Lincolnshire Reservoir version November 2022	Accent	WRMP	Qualitative24 reconvened groups covering HH, NHH and future Quantitative 5902 HH and 553 NHH	Qualitative reconvened groups Quantitative survey	3	3	3	Public value	3
54	Customer preferences on added value for large resource schemes Final Report - The Fens Reservoir version November 2022	Accent	WRMP	Qualitative - 24 reconvened groups covering HH, NHH and future Quantitative 5902 HH and 553 NHH	Qualitative reconvened groups Quantitative survey	3	3	3	Public value	3
55	Water Resources Management November 2022	Scope	WRMP (metering/ leakage) & PSR services	12 people from Scope's Research Panel	In-depth and Qualitative	3	3	2	WRMP &PSR	2
56	Charging arrangements consultation January 2023	Anglian Water	Development services charging	15 customers who have 'worked with' AW	Survey	2	1	1	charging	2
57	Evidence Review of Retail Business Water Market Jan 2023	CCW	Retail market	Desktop review 22 report	Desktop review	2	3	3	Retail market	1

58	PR24 follow-up task November 2022	Incling	Priorities, investment, bill impact	158 customers	Online community	2	1	2	Priorities and affordability	2
59	LTDS November 2022	Incling	SDS, future, what does good look like	142 customers	Online community	2	1	2	SDS and future expectations affordability	2
60	Storm overflows February 2023	Incling	Awareness/ trust and plans – storm overflows	4 customers	Online community – focus group	2	0 – very small sample size	2	Storm overflows	2
61	River water quality tool testing – October 2022	Incling	River water quality	142	Online community	2	1	2	Storm overflows, pollutions	2
62	Trust and transparency in the water sector February 2023	Ofwat / Savanta	Trust	2016 with additional 300 boost for ethnicity and 300 boost for Welsh participants	Online - quantitative	3	3	2	Trust	3
63	Get river positive	Incling	River quality	513	Online community	2	1	2	River water quality/ storm overflow/pollution	2
64	DWMP Storm overflow responses	Anglian Water	Storm overflows	9 stakeholders	Consultation	2	1	1	Storm overflows	2
65	Integrated WTP study February 2023	ICS	Valuations	1279	Quantitative	3	3	3	values & relative preference weights	3
66	Community engagement events (ambassador)	Anglian water	General	24 events – total 374 customers	Survey	2	1	1	Smart metering, surface water management, climate change, priorities, biodiversity, coat, plastics & PSR	1
67	Affordability March 2023	Incling	Affordability and social tariff subsidy	171 (excluding anyone on social tariff)	Online community	2	1	2	Social tariff subsidy	2
68	Affordability	Anglian Water	Affordability – future customers	Five schools (yr 7-college level), consisting of 35 breakout groups	In person focus groups	2	1	2	Social tariff / affordability	1
69	Cost of Living 1 December 2022	Incling	Charging and debt	170 customers	Online community	2	1	1	Charging and debt and water saving	2
70	Cost of Living 2 December 2022	Incling	Impact of social media messaging	136 Total sample (that took part in all tasks)	Online community	2	1	1	Communications, trust, transparency	2
71	Cost of Living 3 January 2023	Incling	Spontaneous brand associations	149 customers	Online community	2	1	1	Brand & cost of living	2
72	Water saving adverts	Incling	Water saving campaign	180 customers	Online community	2	1	1	Demand management	2
73	Spring gardening email April 2019	Incling	Water saving	116 customers	Online community	2	1	1	Water saving/ wider engagement/ brand	1
80	Pulse survey – December 2022	56 Degree insight	Customer satisfaction	202 customers	Online	3	3	2	Satisfaction	2
81	Pulse survey – January 2023	56 Degree insight	Customer satisfaction	201 customers	Online	3	3	2	Satisfaction	2

82	Pulse survey – February 2023	56 Degree insight	Customer satisfaction	201 customers	Online	3	3	2	Satisfaction	2
83	Brand Tracker February 2023	56 Degree insight	Customer satisfaction	500 customers	Online	3	3	2	Satisfaction	2
84	Pollution signage	Incling	Communication	118 customers	Online	2	1	2	Pollutions/ education/ comms	2
85	Pollution incident December 2023	Incling	Pollutions	130 customers	Online community	2	1	2	Pollution	2
86	Seasonal demand June 2022	Incling	Demand management messaging	170 customers	Online community	2	1	2	Demand management / comms	2
87	Sustainability week 1 – November 2022	Incling	Sustainability	208 customers	Online community	2	1	2	Sustainability	2
88	Sustainability week 2- November 2022	Incling	Sustainability / Net zero	240 customers	Online community	2	1	2	Net zero	2
89	CSAT mirror survey November 2022	56 Degree insight	Satisfaction	204 customers	Online CATI & CAPI	3	3	2	Satisfaction	2
90	PR24 societal valuation programme: Post event research March 2023	ICS	Valuation of service loss	298 customers	Telephone interview with impacted customer	3	3	3	Service loss	3
91	Outcome incentives research	ICS	Performance commitments / ODIs / bespoke PCs	609 customer (including 50 digitally disengaged a& 34 future)	Online (559) F2F (50)	3	3	3	Performance commitments	3
92	PR24 Social tariff qualitative	Accent	Social tariff	12, 60-minute interviews	Depth interviews	2	2	1	Social tariff	3
93	Customer Investment priorities Wave 4 April 2023	Trinity McQueen	Priorities & investment	433 customers	Online	3	3	3	Priorities and performance commitments	3
94	Pulse survey – Nov 2022 - March 2023	56 Degree Insight	Customer satisfaction	245 customers for Mar (1800 customers since August 2022)	Online	3	3	2	Satisfaction TUBS	2
95	Water Matters 2021-22	CCW	Customer satisfaction	351 customers	-	2	2	1	Satisfaction	1
96	PR24 Asset Health	Incling	Asset Health	174 customers	Online community	2	1	2	Asset health	2
97	PR24 Bespoke commitments	Incling	Performance commitments	153 customers	Online community	2	1	2	Performance commitments/ investment priorities	2
98	River health – brand and insight 2022/23	Anglian Water	River health, Storm overflows, transparency,	Wider insight	Desktop analysis	1	2	1	Wider engagement and company perception	1
99	PR24 Performance commitments Jan 2023	Incling	Bespoke PCs	160 customers (split into 2 groups)	Online	2	1	1	PCs	1
100	Affordability for social tariff Apr 2023	Incling	Social tariff	171 Customers (including those not on tariff)	Online community	2	1	1	Social tariff & affordability	1
101	Customer Principles May 2023	Incling	Priorities	158 customers	Online community	2	1	1	Priorities	2

102	Bathing water Oct 2022	Incling	Bathing water	167 customers	Online community	2	1	1	River quality, bathing waters quality	1
103	Affordability – Knowledge hub Apr 2023	Incling	Affordability	3 customers	Online focus group	1	2	2	Affordability, social tariff	2
104	Storm overflows – knowledge hub Feb2023	Incling	Storm overflows	4 customers	Online focus group	1	2	2	Storm overflows	2
105	Get River Positive Map – feedback	Incling	Storm overflows	148 customers	Online community	2	2	1	Storm overflows & leakage	1
106	TUBs Mar 2023	Incling	TUBs	161 customers	Online community	2	2	1	Water restrictions, TUBS, messaging	2
107	Stakeholder views May 2023	Anglian Water	Priorities	overview	Desktop	1	2	1	Priorities	1
108	PR24 social tariff (quantitative) July 2023	Accent	Social tariff WTP Affordability	1,516 customers	765 online and 751 telephone	3	3	1	Social tariff	2
109	PR24 AAT – light touch July 2023	Accent	Affordability & Acceptability	442	Online (Email – push to web)	3	2	1	Affordability & Acceptability	3
110	Shaping the LTDS June 2023	Trinity McQueen	LTDS	24 customers (incl 4 future)	Face to face & online depth	2	3	2	Long term investment	2
111	LTDS Stakeholder Views Part A - Thematic Analysis Report May 2023	Bio-diversify	LTDS	70 stakeholder documents	Desktop	2	2	1	Ambitions	1
112	LTDS – customer panel Jul 2023	Anglian Water	LTDS	7 members	Survey	2	1	1	LTDS	1
113	A – WINEP	Incling	WINEP	5 (focus group) and 149 customers	Focus group & survey both online	2	1	2	WINEP	2
114	LTDS Stakeholder Views Part B – qualitative analysis JUly2023	Bio-diversify	LTDS	70 stakeholder documents	Desktop	2	2	1	Ambitions	1
115	Commitments	Incling	Performance commitments	150 customers	Online community	2	1	2	Bespoke Performance commitments	2
116	Cost of living – wave 3 May 2023	Ofwat	Affordability & social tariff	2600 customers (across UK)	Online	2	2	1	Affordability	2
117	Acceptability & Affordability testing Jul 2023	Incling	Acceptability	5 customers	Online community – focus group	1	1	2	How to communicate the business plan	2
118	Integrated willingness to pay July 2023	Eftec/ ICS	WTP values	1,078 household and 201 non-household	Online survey	3	3	3	WTP	3
119	R-Mex	MOSL	Retailer customer service	12 retailers	unknown	1	1	1	Retailers service	2
120	School activity - affordability and acceptability	Anglian Water	Affordability & acceptability	52 school children	unknown	2	1	1	Affordability	1

121	WRE Triangulation report	Impact MR	Investment priorities	47 pieces of qualitative and quantitative customer and stakeholder research	Desktop	2	3	2	Water resources, environmental, resilience, best value, water quality	2
122	Bill summary August 2023	Incling	Bill summary	144 customers	Online community	2	1	1	Bill explanation	1
123	Leaky loos July 2023	Incling	Leaky loos/ demand management	171 customers	Online community	2	1	1	Demand management	2
124	TUBS – farming Aug 2023	Incling	Cover crops – demand management/ TUBs	152 customers	Online community	2	1	1	Demand management	2
125	Water recycling	Incling	Water recycling, comms	161 customers	Online community	2	1	1	Water recycling	2
126	Brand tracker	56 Degree Insight	Satisfaction	500	Online survey	3	3	2	Satisfaction	2
127	LTDS – Intergenerational groups	Accent	LTDS	6 families – 3 generations	Online Moderator led sessions, with observational and behavioural tasks	3	2	2	LTDS	3
128	Community ambassadors update Sept 2023	Anglian Water	General, priorities	Community groups	In-person events	1	1	1	Priorities	2
129	FAQ & support pages Aug 2023	Incling	Customer comms	18 customers	Online community	1	1	1	Comms	1
130	Managing payments Jun 2023	Incling	Customer comms	18 customers	Online community	1	1	1	Comms	1
131	My account email July 2023	Incling	Customer comms	20 customers	Online community	1	1	1	Comms	1
132	SMS user ID July 2023	Incling	Customer comms	167 customers	Online community	2	1	1	Comms	1
133	Pulse survey Sept 2023	56 Degree Insight	Customer satisfaction	200 customers for Jul (2600 customers since August 2022)	Online	3	3	2	Satisfaction	2
134	Final Affordability & acceptability testing (quantitative phase 2)	Accent	Affordability & acceptability	1073 HH and 507 NHH customers (weighted to 692 and 347 respectively)	Recruited 433 post& 640 email – all push to web for online survey	3	3	3	Affordability and acceptability	2
135	Qualitative Affordability & acceptability testing	Accent	Affordability & acceptability	93 HH , 129NHH & 22 future	In person focus groups, depth interviews, online focus group	3	3	3	Affordability & acceptability	3

Faldrax Consulting Ltd

COMMUNITY ENGAGEMENT

About the authors

Faldrax Consulting Ltd is an independent consultancy with a key focus on community engagement. Its director has worked with regulated utilities for over 29 years and has a wealth of experience in stakeholder engagement, customer research, public relations, asset management, regulation and sustainability.

The company also provides expertise in internal communications, project management, copywriting, editing and proofreading. Crafting clear messaging across print and digital channels and cutting through complex information to make every communication meaningful and impactful, is at the heart of the business.