Affinity Water

What our customers and stakeholders want

A triangulation of Affinity Water customer and stakeholder views

V6 – August 2023

Contents

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What Customers Want

Our Customers Want…

A reliable, clean water supply

Our customers have told us they want a clean, safe, reliable and plentiful supply of water so they don't need to worry when they turn on their taps.

Concerns over future supply aren't at the top of their minds, but there is awareness of an aging infrastructure, rising population, and climate change.

Customers want to be assured that we are making plans for the future.

Be fair

Our customers want us to fix the leaks and reduce water wastage.

Our customers are concerned about the impact of bills on vulnerable customers and don't want bill changes to negatively impact them.

Our customers want fair, progressive billing and charging structures that support paying for what you use, and charging more to those who use the most water.

Be more proactive

Our customers have told us they want us to do more to protect and restore the environment and they want us to go beyond the statutory minimum regulations.

When it comes to customer service, they don't want to have to contact us but if they do it needs to be easy, for example, through an app.

Our customers support the use of smart meters to keep them informed.

Be more transparent

Our customers want us to have more contact with schools and spread the word about urgent issues such as the environment and water supply, through a wider education and engagement programme.

Our customers understand why we need to raise prices, but are more likely to accept them if we can demonstrate that we have invested in what we say we have.

Affinity Water

Good Supply

Clean & Reliable

Above all else customers want water that is safe, clean, reliable, and plentiful. They want to not worry about what happens when they turn their tap.

Affinity is expected to take the lead in ensuring water is safe and clean, and customers have no strong preferences on the how; reducing chemical use is preferred, but customers are cautious about costs involved in alternatives at the moment.

Issues around hardness and lead are high in customer minds, especially hardness, which is often equivalised with Water Quality in customers' minds. Customers would like to see fewer aesthetics-related incidents with their water, and more done to reduce lead in pipes.

Low pressure only affects a small proportion of the customer base, but has an impact both emotionally and physically when it does.

Plentiful

Concerns over future supply are vague, but there, with some awareness of aging infrastructure, rising population and climate change. Customers want to be assured that Affinity is making plans to ensure these are mitigated in advance, and plans for alternatives to abstraction are generally accepted.

Key Sources:

Topics 10, 19, 28, Water Community
Water Quality Deep Dive, Impact
Priorities Qual & Quant, Eftec
Water Source Change, Water Club

Affinity Water

Fairness

Fix the Leaks

Leaks are the hot button issue that pervades customer thinking on almost every issue. Leaks are felt to be fundamentally unfair: customers believe we should have our own house in order before passing on charges; leaks excuse profligate water use in those who don't want to reduce their usage, and disheartens those who do.

Leak targets aren't considered ambitious enough, and 15Ml/day level comes across as a stunning amount to lose.

Key Sources:
Topics 5, 15, 22, Water Community
Environment Deep Dive, Impact
Priorities & Valuation Research, Eftec
Awareness & Understanding of Water Issues, CCW

Protect Vulnerable Customers

Across different research customers have expressed concern around the impact on 'vulnerable' customers of all kinds, and are keen to see than any changes to billing do not severely impact them.

They want to see what measures are in place to ensure vulnerable customers are not negatively affected by changes in price, *billing* structures or customer service levels.

Levels of awareness of what support is there is not as high as it should be.

The cost of living crisis has made more people aware of the need for help, yet it has also made people less willing to pay, due to concern over their own bills, and there is only luke-warm support for extending the social tariff.

Key sources:
Topics 7, 22, 32, Water Community
Deep Dives, Impact
AAT testing qual, Accent
Social Tariff Customer Preference, Accent

More Progressive Billing

Across different research customers have said that paying for what you use is the fairest form of billing, and those who use most should pay more. Customers want to see charging structures that support that.

They are largely open to rising block tariffs, as long as the structure feels "fair", and that extra protections are built in for the vulnerable.

There is a sense that standing charges are not fair, and many feel other costs should be spread across the price per litre, though a small standing charge is tolerable.

Key Sources:
Topics 6, 33, 55, Water Community
The Role for Rising Block Tariffs in Water Affordability, Economic Insight

AffinityWater

Proactivity

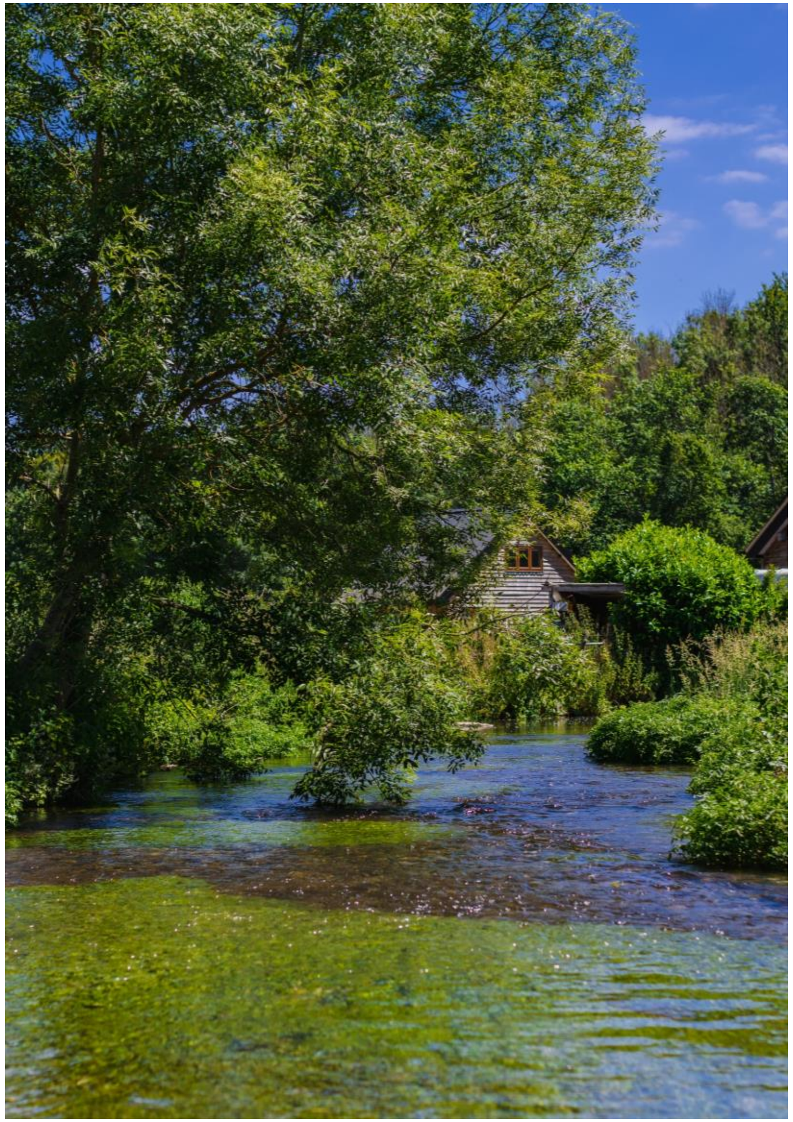
In Customer Service

Customers don't want to talk to us at all, if at all possible. For many that means being able to handle things through an app. Smart metering is expected in this day and age.

But if something does happen, they want us to do the reaching out, e.g.:

- notifying them about alerts in their areas
- monitoring customer water use patterns for internal leaks
- actively keeping in touch regarding any works being done or any external leaks reported

Key Sources:
Topics 13, 15, 21, 24, 38, Water Community, Awareness & Understanding of Water Issues, CCW



In Protecting the Environment

Customers are concerned about the environment, but do not believe their individual efforts have impact, and expect Affinity Water to be a leader in this area.

Customers want us to do more to protect & restore the environment. They want us to go beyond statutory minimums (though how far is often limited by personal circumstance).

Environmental restoration projects score highly in Willingness To Pay studies, and in our priorities work, especially river restoration and increasing bio-diversity.

Reducing Abstraction is supported, though largely as a more general part of protecting the environment than through any real understanding of the issue.

Reducing carbon is a particular want of our non-household customers who want to be able to cut their own carbon footprints.

Key Sources:
Topics 2, 5, 9, 43, 51, Water Community Environmental Deep dive, Impact Priorities Qual & Quant, Eftec

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Transparency

More communications

Another common thread across all the PR24 research is that customers do not know much about Affinity Water (though many say they don't want to know more). When discussing issues in detail, respondents would often comment 'I didn't know that' and 'Why aren't they telling us that?'. Awareness of our environmental actions are low.

They want to see more general education undertaken to schools and the wider communication of urgent issues around water supplies and the environment. Though this is often in the belief that it will get "Others" to waste less water, rather than themselves.

Seeing us deliver

Customers are generally resigned to price rises but will be more accepting if we can demonstrate we've invested where we said we have. They want to see us keeping our promises, especially on infrastructure and environmental rebuilding. Doing so will both build trust and make customers more forgiving should anything go wrong.

Customers are concerned that they will get nothing for any increased bills, and it will be used purely to pay dividends to shareholders.

Key Sources:
Topics 13, 20, 24, The Water Community
PR 24 Deep Dives, Impact
Priorities Qual, Eftec,

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Introduction

Developing 'What Our Customers and Stakeholders Want' (WCSW)

To ensure our plans and strategies deliver what customers want, their needs and expectations are consolidated in our WCSW document. It provides a consistent and robust evidence base for our plans and decision making

Evidence gathering	Synthesis and triangulation	Insight and action
We collect a wide range of evidence through the analysis of day-to-day customer insight, customer research & consultation and the analysis of operational data. A wide range of customers were engaged to explore similarities and differences across customer segments. Where appropriate, a 'citizen' view was explored, as well as looking at non-household segments. We also engaged our stakeholders to understand how their views aligned or differed.	We have developed an approach and framework to gather and triangulate customer evidence. This framework sets out the key objectives for engagement. Each new piece of evidence is evaluated and consolidated in alignment with our triangulation methodology (set out in full in the Customer Engagement Synthesis report).	We document the outcomes of the triangulation of customer evidence in the synthesis report and summarise our conclusions in the WCSW report. This report informs the development of: • Our current customer experience improvement strategy • Future customer experience strategy and planning • The development of our performance commitments • Our investment and business plans • Long-term asset strategy (including our Water Resources Management Plan (WRMP), Water Industry National Environmental Programmes (WINEP) and Long-term Delivery Strategy (LTDS))

AffinityWater

Affinity's strategic direction

Our four ambition statements are our strategic response to what our stakeholders and customers have told us

Our long term ambitions

Environment

Leave the environment in a sustainable and measurably improved state.

- End unsustainable abstraction from chalk groundwater sources
- Achieve Net Zero for operational emissions by 2030 and all carbon by 2045
- Deliver a net gain in Natural Capital

Customers

Deliver what our customers need, ensuring affordability for all.

- Exceed customers' expectations for drinking water
- Personalise our services to support different needs and wants
- Take care of our vulnerable customers and keep bills affordable

Resilience

Be prepared for change, and resilient to shocks and stresses.

- Ensure a resilient supply of water for our customers
- Ensure our physical assets are resilient for the longterm
- Ensure our people, processes, suppliers and finances remain resilient

Communities

Work with our communities to create value for the local economy and society.

- Build trust and transparency
- Enhance environmental and social health to provide value to our communities
- Reduce our impact in the water environment for all

Affinity Water

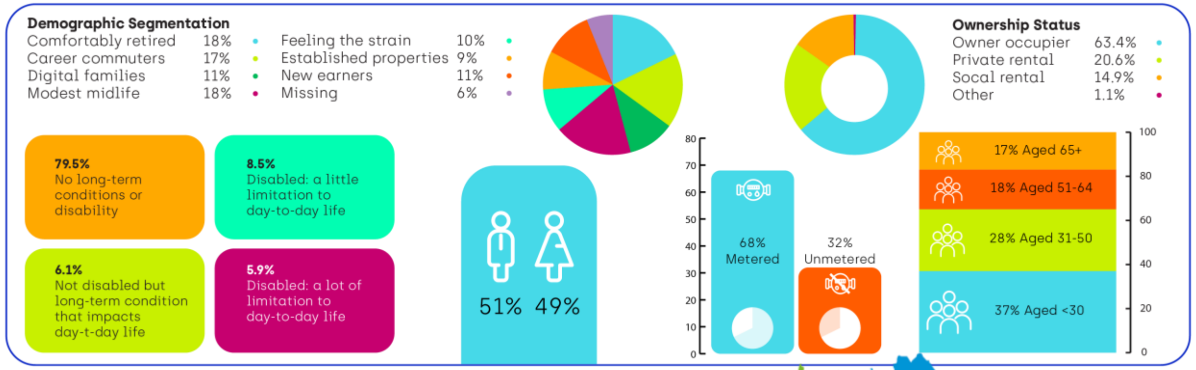
The Details

Meet our household customers

We serve 3.8m customers across 1.5m households

Customer demographics

We currently serve 1.5m households. This has been rising at just under 1% every year since 2017, an average of 14,200 properties, a trend that could see another 100,000 households added by 2030. 67.6% of our customers had a meter by the end of March 2023, a rise of 4.4% on 2022.

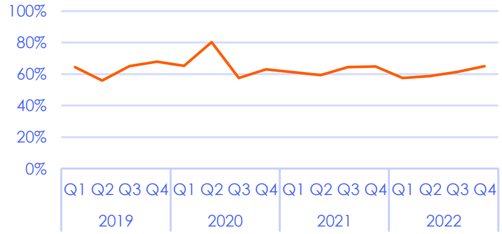


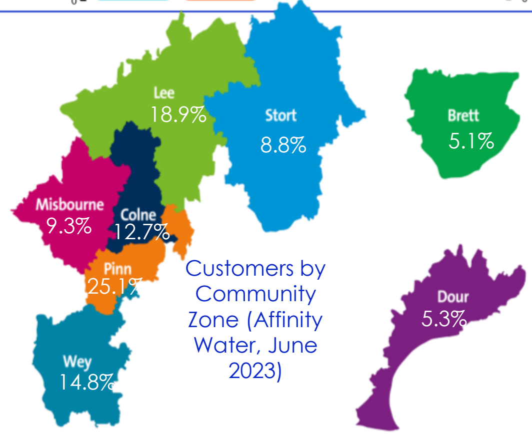
Source: Affinity Water; Experian; ONS

Customer awareness fluctuates a little, but is largely stable at ≈63% unprompted awareness each year

The Perceptions survey uses random-digit-dial surveys with sole or joint bill payers in the Affinity Water area to measure awareness of Affinity in the general population. It has been largely steady for sometime, and whilst activity such as SOS can create a temporary uplift, often this uplift still isn't a significant increase.[201] Our awareness is slightly below national figures suggesting that 7 in 10 know who their suppliers are.[128]

Spontaneous Customer Awareness
Source: Blue Marble[99]; DJS[151]





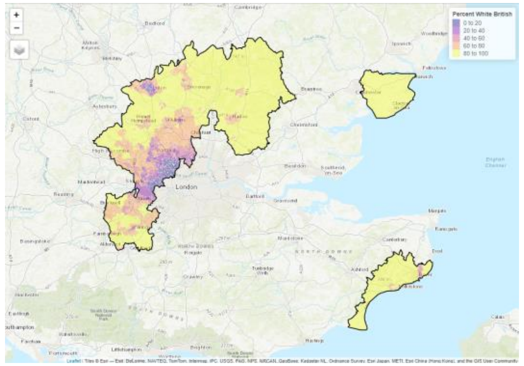
Customers by Community Zone (Affinity Water, June 2023)

The Affinity Water area is highly variable with groups often highly concentrated in particular communities rather than truly mixed

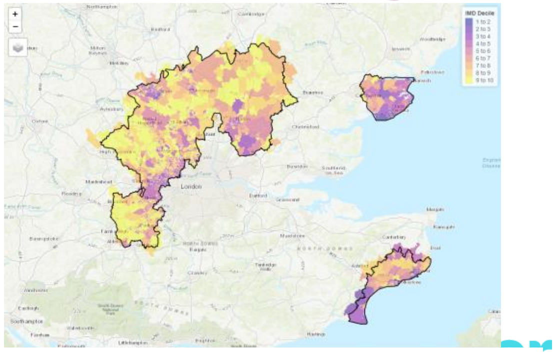
The Affinity Water area covers areas from the very urban to the very rural, and of extreme deprivation to significant affluence. The Affinity Water area includes both the single most deprived area in England(Jaywick, near Clacton) and the 10th least deprived (Chorleywood).[109] Customers are not evenly spread, with 1 in 4 customers located in Pinn, the smallest geographical area.

The coastal areas of Brett & Dour have a generally more vulnerable profile than the central area north and west of London. In these communities the average age is older, (27.0% over 65 in Brett, 22% in Dour, vs 16.4% in Central) and more likely to have a disability or life-limiting condition (30.4% in Brett, 28.5% in Dour, 19.9% in Central).[177]

Ethnicity is another demographic that is highly concentrated. The % of population that is white British is very high outside of the west London suburbs, with small enclaves in Staines and Luton. Outside the M25, the proportion of the population from an ethnic minority falls sharply. 56.4% of the population identified as White British in Central, compared to 92.1% in Brett and 88.8% in Dour[177]



% White British population: the lighter the colour, the whiter the population[177]



Index of Multiple Deprivation (2019)[109]: The darker the colour the more deprived the area

Household customer priorities

What we know: priorities are not a simple hierarchy, and they vary by customer type; understanding the cost of services is key for customers in making their choices

Customers priorities are always in flux; they vary with economic and climate condition. But no-one thinks the status quo is enough.

Attempts to rank vary, depending on audience and the items selected for ranking. Focus groups, where future and non-household customers were included, produce very different rankings to those produced by the customer panel. In addition, the Water Panel's ranking took place in late spring, and inflation rises over summer impacted responses to a wider audience's ranking in October 2022.[152, 200]

As a result of sudden rises in inflation, and a controversial mini-budget in September 2022 having unforeseen adverse effects on the economy, affordability suddenly becomes a much more pressing issue than it had been in earlier months. [200]

When shown a set of investment options across five areas, the preferred package of household customers generally doesn't include keeping any area at the status quo, showing that whatever is done, leaving things as they are is not ambitious enough.[199] However the position on hardwater is particularly nuanced (see the Water Quality section) [200,208]

Customer priorities are much more interconnected than these presented hierarchies suggest.

In discussions, preserving the environment, fixing leaks and updating infrastructure are intrinsically linked. Fixing leaks is seen as one way to preserve water supplies and prevent environmental damage from abstraction; updated infrastructure prevents leaks, which leads back to protecting the environment.[134,152, 200]

Priority of KLOE Statements
Source: Water Community (June 2022) [152]

*denotes ICG KLOE statements (others are alternative statements based on common themes of Water Community Discussions

Ultimately, clean safe water is the base need, there is less sensitivity to other issues.

Priorities work by Affinity Water, and Ofwat's ODI valuations show that respondents are most sensitive to issues that impact the availability of safe drinking water, regardless of the selection set presented. [200, 207, 208,239]

Pricing of plans, both individually and in aggregate can substantially change people's opinions, as the reality of the purse tempers the aspirations of principle. [199]

In qualitative research into five asset-based investment areas (Environmental repair, Carbon Net Zero, Lead replacement, Resilience and Hard Water), environmental preservation & repair ranked highest. Hard Water was the lowest priority, with Carbon Net Zero, Lead Replacement, and Resilience all sharing second place.
The following quantitative stage produced a very different set of priorities: when the quantitative work was done, Lead replacement was considered the highest priority for Household customers, followed by Hard Water, Resilience, Environment; Carbon Net Zero was the lowest priority. The differences could be attributed to the fact that the qual research led to a discussion between participants about the relative risks of lead replacement which may have altered people's priorities.

Once respondents compared the options and could see how they would combine into total bill impact, there was only one real change to the overall pattern: lead moved from the third highest investment to the second. However, individuals changed their opinions quite a lot when costs are shown in the whole; between a third and a half of customers selected a different option.[199]

Household customers – Qual – November 2022

- Affordable bills for all
- Provide water that looks good, tastes good
- Reduce the amount of water that is lost through leakage
- Prevent interruptions to water supply
- Ensure there is enough water to reduce the risk of any restrictions on usage during a drought
- Reduce the environmental impact and improve natural habitats in the region
- Maintain existing infrastructure for current and future customers
- Ensure properties consistently receive good water pressure
- Support customers to reduce their water usage
- Work with communities to deliver a society and environment that are mutually sustainable
- Improve Customer Services

Household customers – Quant - January 2023

- Provide water that looks good, tastes good
- Affordable bills for all
- Prevent interruptions to water supply
- Reduce the amount of water that is lost through leakage
- Ensure properties consistently receive good water pressure
- Ensure there is enough water to reduce the risk of any restrictions on usage during a drought
- Reduce the environmental impact and improve natural habitats in the region
- Maintain existing infrastructure for current and future customers
- Improve Customer Services
- Support customers to reduce their water usage
- Work with communities to deliver a society and environment that are mutually sustainable

Affinity Water customer prioritisation of a selection of business aims, (Eftec/ICS October 2022, January 2023).[199]

Non-Household Customer Priorities

What we know: For NHH customers, maintaining the supply is essential, as well as providing speedy and accurate customer services for Retailers

Non-household customers* have an even more distant relationship to Affinity Water

As most Non-Household customers get their water from Retailer companies, Affinity Water has relatively little information about the profile of its non-household customers.

Much like Household customers, retail customers (NHH) are largely unengaged with water providers, and awareness that there is even a market is falling.[193] There is some confusion over who is responsible for what; additional services and benefits are not cutting through.[193] That said, activation in the market (Considering/actually switching is increasing, with 3rd Party Intermediaries smoothing the way. After prompting from brokers, and potential savings, poor customer service plays a role in a customer becoming active – a third of contacts to retail result in dissatisfaction.[193] Priorities work amongst Affinity Water's NHH customers show that improving customer services was the second most important issue.[207]

R-MeX results for February 2023 puts Affinity Water's offering to retailers at the top of the market. Affinity Water was rated highly for speed of response, effectiveness of systems and notifications and level of engagement and support.[194] These are all areas that the CCW raised as areas that lead to businesses becoming active when changing retailer.[193] It is easy to speculate that by being prompt and responsive to retailers enables retailers to retain their customers.

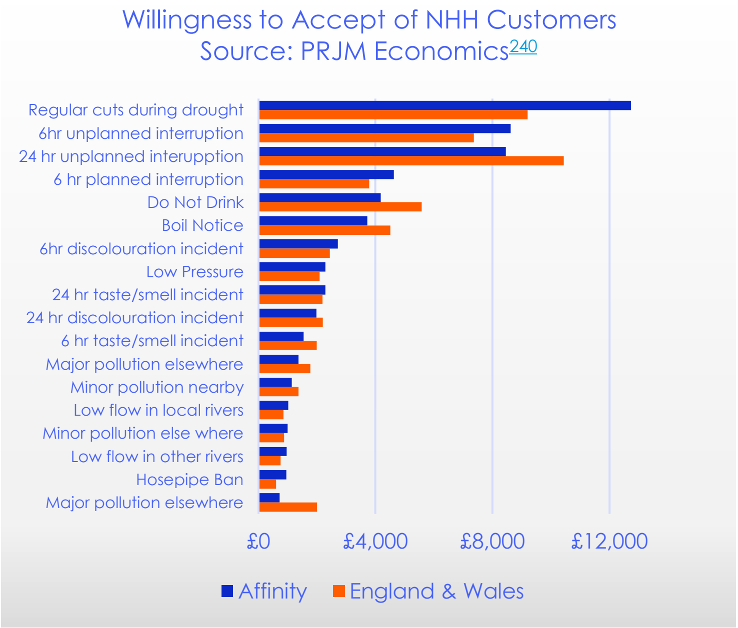
Affinity Water customer prioritisation of a selection of business aims, (Eftec/ICS October 2022, January 2023).[199]

Whilst there are some similarities between Household and Non-household customers' priorities, there are also several differences

Overall, NHH customers are more concerned with maintaining a regular supply, and related issues - water pressure & preventing temporary usage bans (TUBs) – are also rated higher than leaks and affordability. Environmental issues are slightly less prominent. When indicating preference for levels of investment on key projects, NHH were much more likely to choose the status quo option for the environmental investment, where HH customers were more split between the three levels of investment.[207, 240]

In general NHH customers were more likely to pick the lower levels of investment compared to Household customers, reflecting comments in a WRE survey that cost control is now even more pressing for Non-household customers (though this is focused on energy rather that water bills) and NHH customers having to balance how much they can pass onto their own customers. [158] In their preferred package, Environmental Improvement was given only minimum investment, whereas the other areas had the next level up.[199]

Amongst business in England and Wales, support for public value projects also differs somewhat to households. The most popular schemes were social ones; sensory gardens for the disabled and improving beach areas, followed by job creation and environmental projects, whereas amongst household customers environmental project had more support. [153]



*most non-household users of Affinity's water supplies aren't technically customers, as they buy via a retailer, rather than directly, but for ease, non-household users are also referred to as customers

Meet Our Stakeholders

Over a hundred groups, organisations and individuals have a stake in how we do business

Our stakeholders are numerous and diverse

As well as official regulators, we work with all levels of government, from district councils to MPs, across all the major parties on everything from co-ordinating roadworks to planning for large projects such as reservoirs.

On the environmental side we have a number of river protection groups, such as Friends of the River Chess, as well as local branches of the NFU, who are involved in our efforts to reduce water pollution and abstraction from chalk streams.

On the customer side we work with debt charities, foodbanks and housing associations to help support vulnerable customers and increase awareness of our social tariffs.

We also work with developers and house builders to look at ways of making properties increasingly water efficient, to reduce consumption with both behavioural and technological means.

Stakeholder Priorities

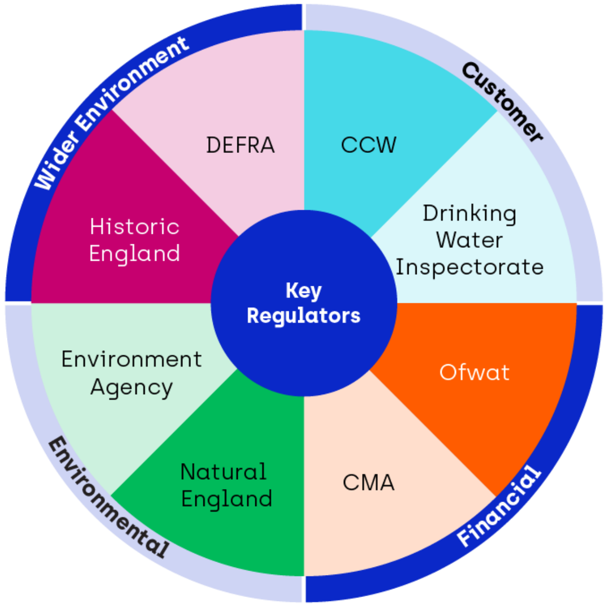
On the whole, Stakeholder priorities haven't been investigated in detail, as their priorities are generally the reason for their existence – Environmental groups want us to do more to reduce abstraction and restore habitats; the Drinking Water Inspectorate is focused on making sure we maintain water safety; local governments may have an environmental angle, but also need us to minimise disruptions due to roadworks and damage from bursts and leaks. There is in some cases a reluctance to engage, with turnouts to events low, and low responses to questionnaires.*

44
Local Authorities

12 MPs
Labour Party

39 MPs
Conservative Party

2 MPs
Liberal Democratic Party



*Internal correspondence

Affinity Water

The Business Plan

Testing Our Plans #1

Plans are mostly acceptable

The Draft Business Plan was put out to public consultation in May 2023

Approximately half of respondents were Satisfied or Very Satisfied with the plan. Not unexpectedly, fixing leaks was most likely to be cited as the most important part, with protecting the environment a close second. There were also strong mentions for reducing abstraction & protecting chalk streams specifically as well.

37% find the increase affordable and 47% find it reasonable. Finding it reasonable is not quite the same as finding it acceptable, and the self-selecting nature of public consultation means its much more likely to attract dissenting opinions, often from the better off who can afford the change, even if they don't like it. [xxx]

Ofwat mandated a standardised Affordability and Acceptability testing across all 17 water companies

As a standardised test, it didn't cover the entire business plan in detail, only focusing on a few parts, and the overall impact, including the cost of the wastewater from whichever provider.

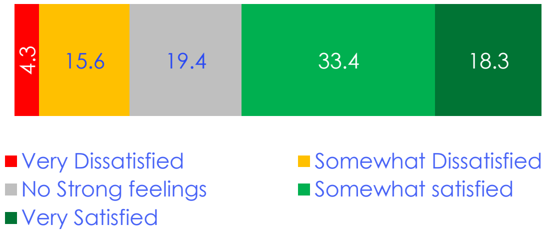
72% found the plan as presented acceptable and 17% found it affordable.[251] Whilst these figures are drawn from a representative sample of customers, it isn't based on a full understanding of the plan, and the qualitative survey showed that customers were also keen to hear about other things, e.g. our plans for smart metering, levels of general infrastructure replacement, and supply options such as desalination.[213]

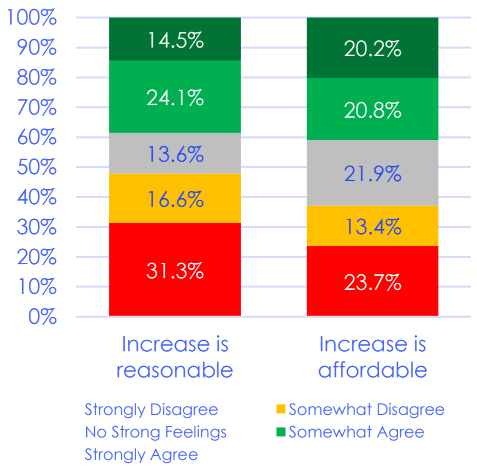
One notable piece of feedback was that the targets on leakage and water quality were considered okay, but should have gone further in their ambitions.[213, 253]

WRMP Consultation

The Water Resources Management Plan, whilst being part of PR24, was also tested extensively in its own right, via Public Consultation, a water community discussion topic and workshops for interested groups including councils, environmental organisations, and businesses.[248] When asked if the plan was balanced, 55% of consultation respondents said it was, but 31% said it was still not right, even though only 5% said it wasn't at all balanced. Almost half of respondents wanted to go faster on reducing abstraction, with reducing leaks and a notable minority wanted more to be done to reduce bills. The Water Community, who are closer to the issues in the WRMP than the average customer, generally found the plan well balanced.[237] This suggests that good levels of education around the issues creates higher satisfaction.

Satisfaction with PR24 Business Plan
Source: Affinity Consultation[248]





Q. What do you feel is the most important part of our plan (n~1840) [248]

Testing Our Plans #2

Your Water, your Say questions showed participants who were thoughtful and informed

Your Water Your Say (YWYS)

YWYS was another Ofwat mandated engagement. Running in two parts, the first session was held in early June 2023 (the second is due in October). Chaired by an independent voice, Kevin Johnson, a specialist communications strategic consultant on stakeholder communications, appointed by Ofwat and CCW. This was an online session where members of the public and stakeholder groups could put questions on the business plan directly to key members of the board, (Keith Haslett, CEO; Rebecca Froud, Director of Customer; Steve Plumb, Director of Asset management and Capital Delivery; Liv Walton, Director of Regulation & Strategy; Ellie Powers, Head of Water Resources).

In line with the Ofwat guidance, a brief presentation on the business plan was given, and questions from the public were invited. Any questions that had been submitted prior to the session to CCW were read out (Affinity Water did not see those beforehand) as well as questions from the present audience. 105 respondents booked to attend, and 65 actually did. In the time allowed, twenty-five questions were asked, on all four of our Strategic Direction areas. Five of those questions were from stakeholder groups, the rest were from the general public.

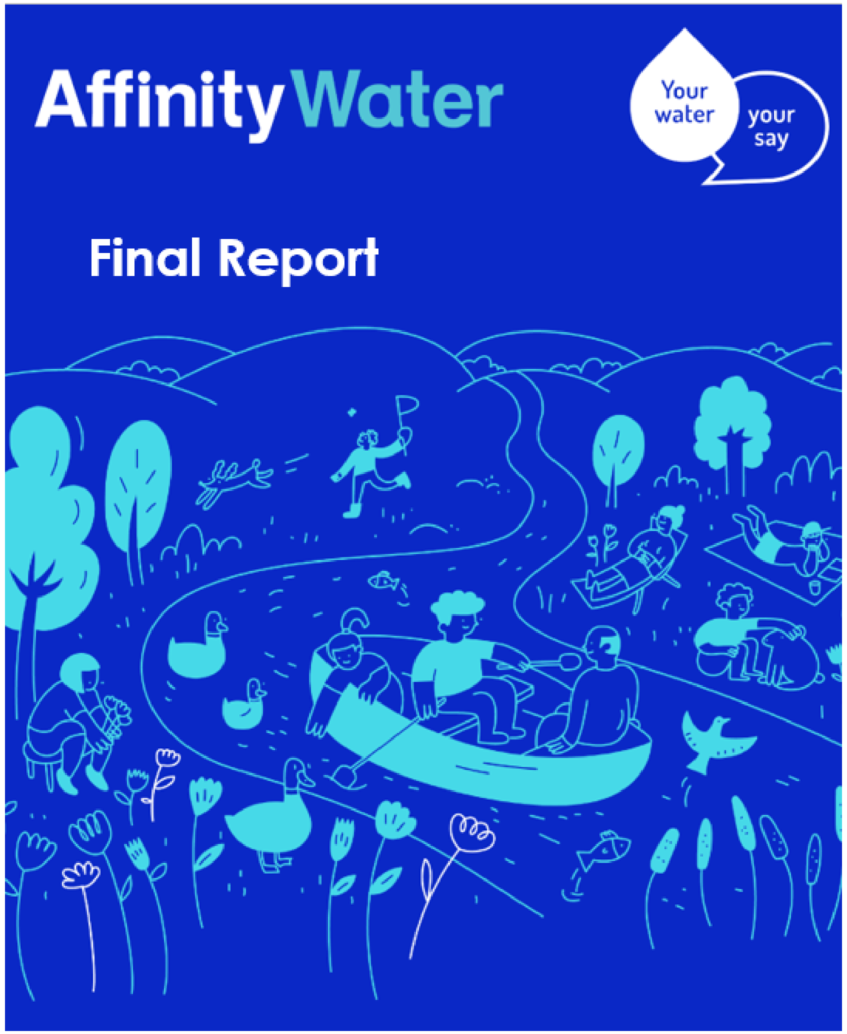
Most questions were directed to finding more detailed information on specific issues, rather than giving overall feedback. Questions around the Grand Union Canal transfer scheme indicated that customers found the idea appealing, though had concerns around the details, but many specifics were brought up in a way to indicate a customer had good or bad opinions of them.

In many cases the questions raised were on issues not directly mentioned in either the presentation itself, or the PR24 Draft business plan consultation document, showing that the customers who came to YWYS were concerned about their key areas, and were well informed about the issues, implying that issues that concern people enough to attend such meeting are varied.

How our plans have changed,

From all these consultations, Affinity Water has made the following changes to its plans:

- We have accelerated our abstraction reduction programme as far as possible within the Central region.
- We have sought to reduce costs and improve affordability by working with the Environment Agency (EA) to defer licence changes that might not be environmentally beneficial as well as triggering potentially inefficient investment.
- We have increased our demand management ambition, but not changed the decision to fit smart meters to 90% of homes and businesses over 15 years.
- We have commissioned additional work to review and update the population and housing forecasts as part of Water Resources South East to ensure we make use of the latest information in our forecasts for growth and planning.



Affinity Water

Affordability & Acceptability

What we know: We've built a plan customers want, but the cost-of-living crisis has hit their ability to absorb the needed bill increase

Acceptability scores demonstrate we've built a plan for PR24 that reflects customer needs and principles

Several studies have shown that the plans are well received, particularly the AAT quantitative that showed that acceptability was at 72% for Household customers.[213, 251,252] Non household customers have a similar level of acceptability, at 75%.

If anything, the plans do not go far enough for some customers: The Summer 2022 Priorities research demonstrated that there is appetite for greater investment, and customers would (in principle) accept a greater bill impact than the one we have proposed, which has been limited by what we a physically able to deliver.[207] Comments in the AAT qualitative stage also indicate that some customers find targets too low.[213]

Acceptability is most negatively impacted by Affordability, and Affordability has been significantly impacted by the cost of living

Amongst those who say the PR24 business plan is unacceptable, or completely unacceptable, the main reasons are objections to profits (the fact that Affinity Water has not made a profit or paid a dividend in several years was not mentioned to respondents), and that the company should be paying for improvements.[251, 253]

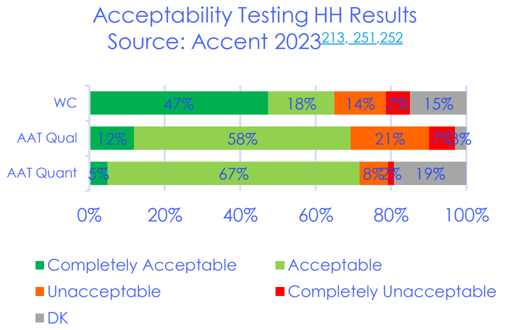
However it is notable that for a good proportion of those saying it is unacceptable has to do with the cost to them directly, implying that the plan may have more support than the topline figures show, and that only personal circumstances are holding some customers back from supporting it. [251]

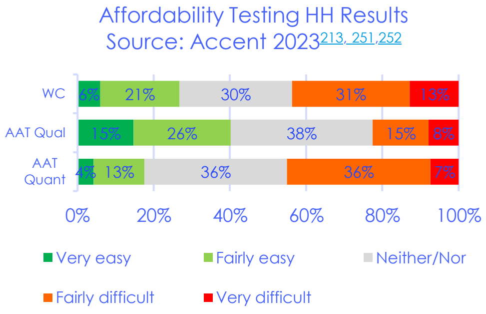
But affordability is an issue for many; one qualitative study, where respondents had time to really think about the plans put almost 1 in 4 saying it is difficult to afford, and only 2 in 5 saying it is affordable.[213]

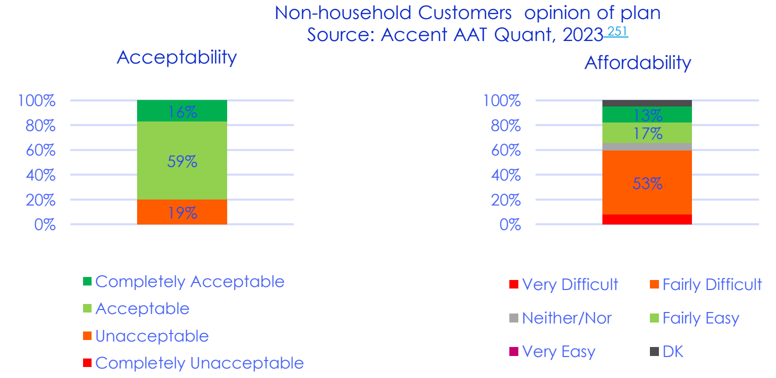
Without seeing the business plan, quantitative research shows that it is more severe than that, with 43% saying it is difficult to afford, and just 17% saying it easy to afford.[251] Non Household customers are more polarised on the affordability issues. 30% say its easy to afford, more than twice HH customers, but 60% say it is difficult, almost half again the amount of HH customers.[251]

Respondents were also asked about affordability after they had seen the business plan. Whilst it didn't change the proportion of respondents saying it was easy to afford, it did have an impact on those saying it was difficult to afford, with a significant increase in those saying they now felt it was neither/nor, rather than difficult.(36% said it would be difficult to afford before seeing the plan, dropping to 26% after). [251]

2 in 5 HH customers surveyed said they struggled to pay household bills at least sometimes, and as expected they were much more likely to find the plan difficult to afford, 83% vs 43% of all households. Only 1% of those struggling financially said it would be easy to afford. Approximately half the sample experienced some form of vulnerability – 1 in 10 were new parents, 1 in 8 had a disability or life-limiting condition. 52% of vulnerable customers said it would be difficult to afford, and 12% said it would be easy.[251]







Affinity Water

The environment

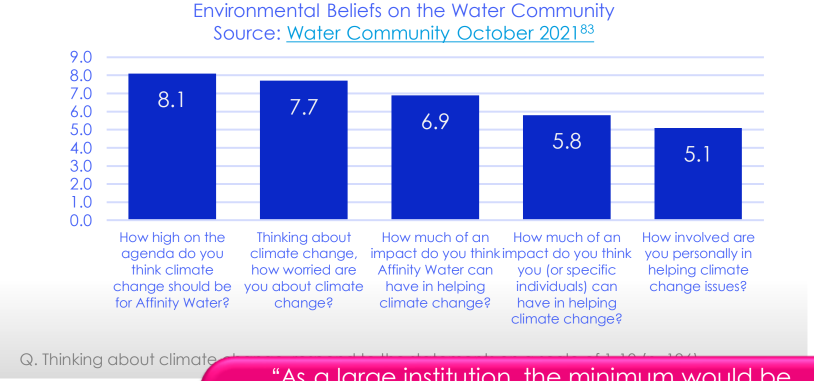
Protecting our environment #1

What we know: our customers struggle to connect how they can individually impact climate change and believe we can deliver the change they cannot

Customers are not climate sceptics; but they do lack awareness of the link between their demand and environmental impact

There is a general feeling that climate change is a serious threat,[2] but awareness of the potential for extreme water shortage is low. There is concern over where new supplies could come from and what that means for the next generation.[134,204]

Few people understand the impact of their water use on the environment, e.g. 45% of respondents from a 2022 national survey saying their use only had a small or no impact on the environment.[133,218] Only 1 in 5 were able to correctly state how much impact personal water use has on the environment.



People say they are concerned for the environment

Qualitative research amongst customers of south-east water companies showed that the environment was a key concern. "*'In this day and age' it was deemed unacceptable that long term plans …would be at the expense of the environment. In addition, participants also wanted companies to ensure plans are sustainable.*" [43]

It is also not a new concern. 2016 research with Affinity Water customers showed that 51% said it was very important (9 or 10 on 0 -10 scale) that we play a role in protecting the environment (compared to 37% for any business).[82] Just over half the water community in 2021 considered climate change one of the most important issues we face today.[83]

"As a large institution, the minimum would be evidence-based advocacy for improvement in infrastructure, business models, investment and behaviour. Affinity water has access to fora and other influential people which we as citizens cannot reach."

"Educate people on how climate change will mean less water available so that people are more aware of the need to avoid wasting water where possible, and starting this education at a young age so that future generations grow up avoiding the bad habits of previous generations."
New Earners, Misbourne[83]

Customers expect leadership to come from Government, but we must play our part

Our customers believe that climate change should be high on our agenda; we can have more impact than they can.[83,134]

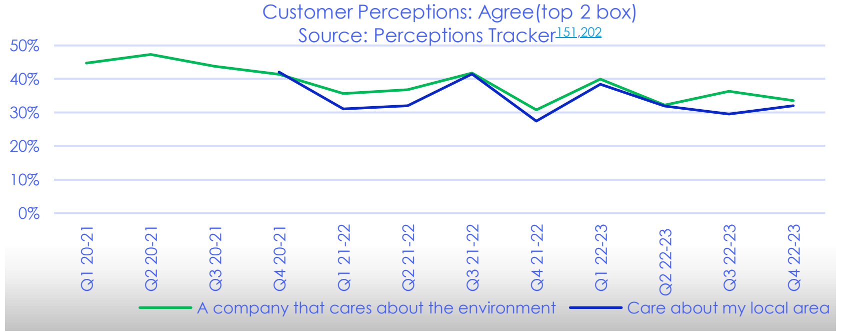
Customers expect us to have a green operation, as a minimum action, by switching to renewables and electric vehicles. They expect us to plan for climate change now and will not be tolerant of interruptions caused by a lack of preparation.[62]

Awareness of what we do to protect the environment is low

Customers are sceptical that we are taking the situation seriously; they are concerned it is a way to raise prices and increase profits.[62, 134] Some feel too much emphasis is put on reducing customer demand rather than working to increase supply in a sustainable way.[62] Ofwat research also shows that few consumers believe environmental issues are best served by emphasis on individual responsibility.[128]

Our water community members couldn't spontaneously identify projects we own to protect the environment. The success of the 'Save Our Streams' campaign shows that better communication can work to raise awareness, (awareness of SOS reached 50% of Affinity Water customers interviewed) although this particular campaign placed emphasis on reducing customer demand.[85]

Belief that we care about the environment is in decline.[103,112] By Q4 22-23, only 32% of respondents agreed that Affinity Water cares for the environment.[202] Recent events haven't made any statistically significant improvements, but it is still slightly better than national research which is only 27%[102]. Whilst UK customers have no choice over their water company, helping the environment and being involved in their local community are the most common reasons for choosing a company in the utility sector, further confirming that high performance here is essential.[65]



Protecting our environment #2

What we know: support for environmentally-led projects is tempered by concerns over costs and the need for proof of investment

There is support for environmental projects, but this is qualified by concerns over cost and leaks

Customers are conscious of needing to protect the environment for the future; environmental projects are seen as having both a great amount of public and moral value, although concern in recent months has been overtaken by issues such as the war in Ukraine and the rising cost of living.[140,131,134] Concern over costs is mixed, with some finding any increase to a bill untenable, and others feeling that a small increase might be negligible in the face of everything else, especially utility bills. Overall, the Water Community believes that Affinity Water alone should bear the cost of investment.[143] In other focus groups, when asked what actions Affinity Water should prioritise to protect environment, 'fixing leaks' ranks above all else (leaks are spontaneously mentioned in other research as well.[134, 200]) In a cross-company willingness-to-pay' study, environment-based projects are accepted at higher bill increases than non-environment linked projects.[153] Ofwat's ODI research, interviewing during the record-breaking hot summer of 2022, showed that environmental issues (pollution incidents, coastal bathing water, low flow, etc.) require much less compensation than the direct inconvenience of Sewage overflows and loss of water supply.[184] Other research shows that, across the country, Household customers' support for Public Value projects is also correlated with proximity, with more support being given to very local projects (within 5 miles) than more distant ones (within 50 miles).[153] Therefore emphasising the locality of our work is likely to increase support.

Meeting the statutory minimum is not enough, and most believe we should be going beyond, though no individual plan is considered more of a priority than others

Customers, once informed of WINEP, strongly approved of its existence, however, it was felt to be the bare minimum and they wanted us to exceed government guidelines. [143, 134]

Most would be happy to pay to support going beyond minimum requirements on the environment, although this was strongly conditional on transparency of the benefits.[134, 200, 207] Areas of priority for environmental investment(reducing abstraction, nature-based solutions, working for the wider good, and going beyond statutory minimums) were discussed with customers, and there was little difference between the options in terms of priority. Returning rivers to a more natural state was most popular by a small margin. Younger respondents were especially keen as they believed it would have a positive impact on wildlife for the future. "Wider good" programmes, such as education and working with farmers, were only slightly less popular, while reducing abstraction and going beyond the government minimums both came a close third. There was some concern over maintaining supply for future generations if abstraction stopped completely. [134]

Overall, all were considered important and worth a little extra cost, given other bill rises people were facing.[134] Subsequent research showed that whilst respondents were split between three different levels of investment on the environment, the majority (40%) still favoured the highest level of investment, that represented a bill increase of £12 per year. [207]

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Customers want to see proof that extra funds are being used to support environmental investment, and not to pay off shareholders

Transparency around how investments are used is critical, with reassurance that bill increases are not used to pay for profits or dividends is key to gaining support for any increases to the bill.[56, 134]

Our customers expect us to educate individuals, lobby politicians and work with others

Community members wanted to see Affinity Water working with other companies to keep waterways clear & clean, managing flood risk, as well as working with government on regulations.[83] They expect to see us educating people on what actions can be taken, through visits to schools & community groups, and use of social media and advertising.[62,83,84,134]

Affinity Water

Ending unsustainable abstraction

What we know: going beyond the minimum standards for abstraction reduction has some support from customers but there is a limit to the amount to which they will fund this

There is general support for reducing river abstraction near chalk streams

Whilst reducing abstraction appears to be a low-ranking priority at a national level,[102] customers appear to be somewhat aware of the local significance of chalk streams, with recent priorities work has shown leaving the environment in a sustainable and measurable improved state ranks 4th out of 11 options, and a majority choosing to take the maximum investment option towards reducing abstraction and river restoration.[200,207]

Few participants had detailed knowledge of what chalk streams were or how they are created,[134, 200] prompting speculation that the support comes from a generalised awareness of protecting the environment and/or local distinctiveness. Participants in one study wanted more information to better understand chalk stream catchments. There were some concerns about how future water demands would be met if abstraction were reduced, especially in light of the earlier population growth and climate change forecasts discussion.[134]

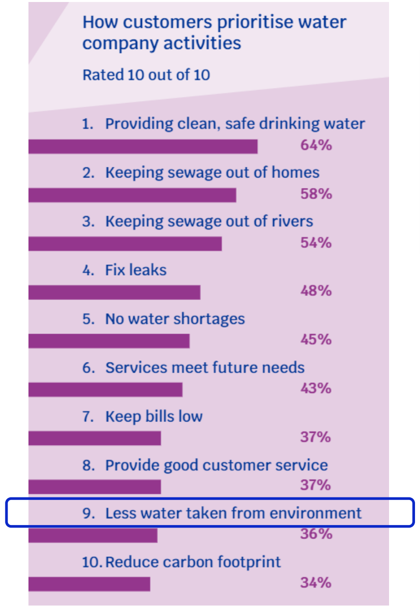
NHH customers also wanted to know more about chalk stream catchments and most felt that we should already be reducing the amount of water taken from these areas.[134]

Go beyond government minimum standards

The overall reaction to having minimum standard was that it should be viewed as the absolute minimum, and we should always strive to do better. This was especially true amongst the future customers, though they reiterated an earlier point that this should not have an impact on the bill, as domestic customers are unable to change water supplier. Several participants wanted to see higher minimum standards set by the government itself, and for increased collaboration between Affinity Water and other companies.[134]

Strong support for the cost of going above and beyond

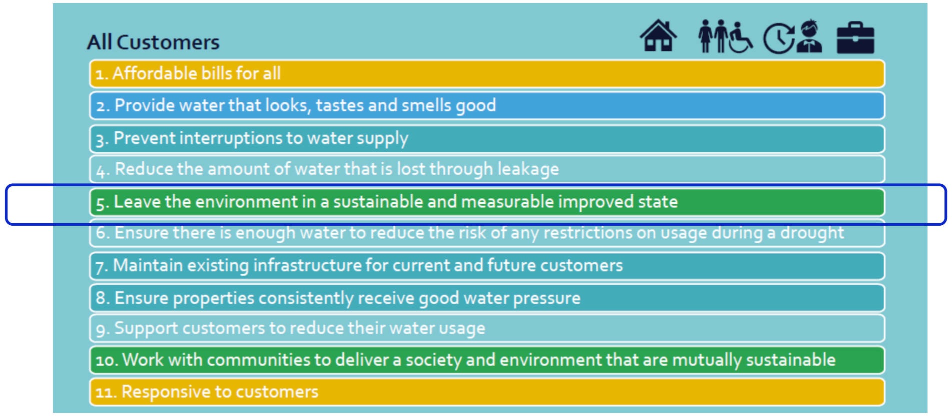
Early investigations showed that an annual increase of £3 a year was deemed acceptable for going beyond the minimum, and there was an appetite to go higher still.[134] Follow-up research showed that that support was strong, with the majority opting for the maximum investment of £12.[200,207] However, it was acknowledged that a higher amount would be difficult for low-income households to afford, and some suggested any increase could potentially be voluntary.[134] The NHH customers were the least willing group to accept a bill increase, believing that we should be funding these improvements by investing our profits.[134, 200] Participants agreed that any cost increase would need to be communicated to customers, with an explanation.[134]



CCW, 2022[102]

"It's really important to keep the natural habitats and not take water from places where it is rarer compared to a lot more places where there is water there, but I think is it something that's quite new because it's something they should have been focusing on for some time anyway?"
NHH customer[134]

"I think £3 a year doesn't seem much at all really and you wouldn't really notice it, and if it's going to have that much benefit then why not?"
Domestic customer[134]



Affinity customer prioritisation of a selection of business aims, (Eftec/ICS October 2022, January 2023).[199]

Achieving net zero carbon

What we know: concern over carbon emissions is increasing, although customers balance it with other environmental drivers. Transparency over cost and effectiveness of our solutions will help customers support our approach

Support for green policies and carbon reduction is contingent on cost

In 2016, 12% of customers surveyed considered it the number one priority, but since then, with the rise of groups such as Extinction Rebellion, and the prominence of events like COP 26, environmental issues now rate much higher after covid.[82 83] there are indications that this importance is falling again in the face of the cost-of-living crisis, and out of the five investment areas tested, reducing carbon emissions was rated lowest of the five.[200, 207] Its also ranked higher by non-household customers than household customers[207], probably due to needing to meeting net-zero targets in their own operations.

Few UK water bill payers (now or future) are willing to pay more for environmentally-friendly products and services, and only 45% of those who pay the bill now or expect to in the future rated the environment as one of the top five issues they face today. (Overall, it ranked 6th after health of selves and family, and finances).[2]

WRMP (February 2021)[43] work amongst customers of multiple water companies suggested that customers are in favour of companies reducing their carbon footprint and using more green energy – but that support was contingent on the impact it had on their bills. They also wanted the impact on the vulnerable to be considered as part of this.

Qual research showed that customer respondents were reluctant to spend more to increase the speed of change[134], however, quant research in winter 2022/23 showed that the vast majority of customers, both household and non-household favoured going beyond the minimum. Whilst they opted for an intermediate level of investment, representing an estimated bill impact of £5.75, 1 in 4 household customers would go even further to ensure targets were reached earlier.[207] For those more reluctant, Carbon emissions are seen as a wider societal problem that everyone needs to work on, rather than something we should prioritise.[134] Future customers are more likely to want to see this prioritised, but just over half had no preference between minimising the use of chemicals or using less carbon intensive treatments.

Customers are largely positive about the Affinity Carbon Net Zero policy

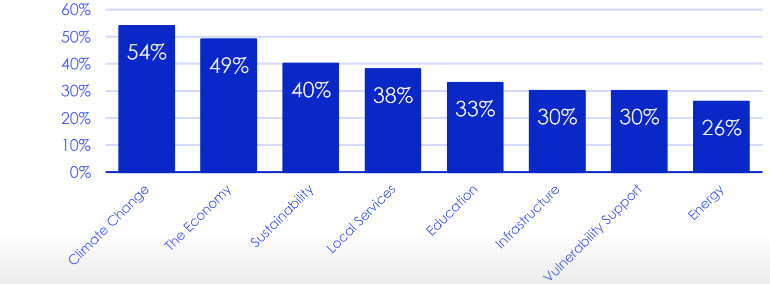
Three quarters of the customer panel felt positively towards it. The 5% who felt negatively thought we should be more focused on undoing existing damage, such as sewage in rivers. More detail was wanted on the timeline of achieving net-zero, and how current emissions broke down. They were also keen to see how we generate our own power renewably, and to switch to green sources.[56] In principle the high energy solution to reducing carbon when treating water was the most appealing option overall, as whilst it may be costly now, the option to use renewables would bring the cost down in future. but there was hesitancy from some due to its dependence on large amounts of energy, especially against the rising cost of living. However, the impact on bills of any change was of far more concern to respondents than the methods used to clean the water.[134]

However, in in-depth discussions some felt that tackling Carbon shouldn't be a priority for water companies[134]

The link between water and net zero is not clear or direct in consumers' minds

Nationally, fewer than 9% consider using less water to be a route to net zero.[128] across twelve focus groups, no-one mentioned this spontaneously, and the link was new knowledge to many.[134, 200]

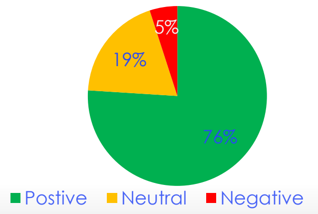
Priority Issues amongst the Water Community
Source: Water Community October 2021[83]



Q. Thinking about different things that can impact people in your region, which 3 areas are most important to you? (n=196)

"All companies, not only Affinity, should prioritise reducing carbon emissions as a close 2nd to providing their primary function."
Modest Mid-Life, Stort[83]

Feelings towards the Net Zero Policy
Source: Water Community December 2021[56]



Q. Which face best represent how you feel (about the Net Zero Policy)(n=126)

Enhancing natural capital - biodiversity

What we know: customers generally support our ambition to prioritise biodiversity, but are split on how far to go – and a significant majority do not want to go beyond current levels

Increasing biodiversity is supported by customers

Hearing that biodiversity and the flows of rivers will be a priority for us is well-received by customers; it shows them that we are doing more than just offering the required services. [134, 200]

During our preferences research with household customers, they chose an environmental option that not only achieved the statutory minimum in terms of reducing abstraction reduction but with the additional benefits of additional catchments undergoing ecological and biodiversity improvements. Non-Household customers were more reticent, with the largest preference going to maintain the status quo. However, with both sets of customers, these preferences are not unequivocal; with large minorities choosing other options. [200,207]

"I say C, 1) because of the price and 2) because it's a realistic expectation… Water is a massive part of the environment but without all the other things being in line, you're never going to get back to what it was. Unfortunately, it's gone too far."
Male, Vulnerable Customer, 55+, Dour [200]

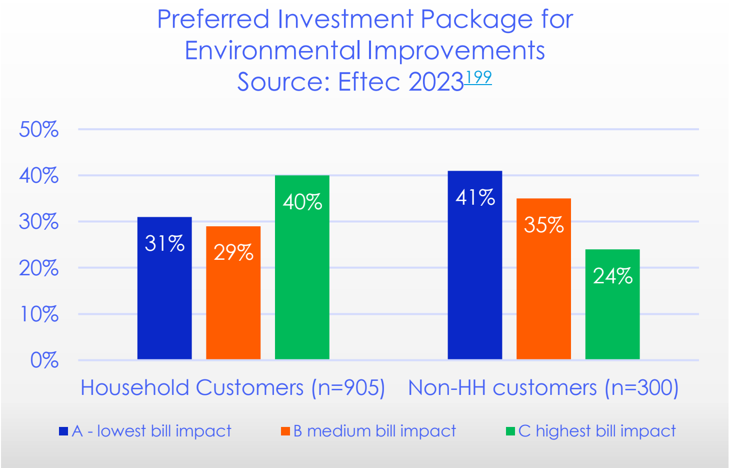
"Improving the flow and biodiversity within the rivers is an excellent idea as the time has come to look after the environment" **Comfortable Retirement, Dour**

"But I'd say supporting biodiversity is slightly more important, in my opinion."
Male, Future customer, ABC1,18-24 [200]

Customers support increasing biodiversity and improving the environment when building large infrastructure schemes

Household customers in the East of England valued the following project additions most highly: 'specialist habitats created for wildlife' (£3.87 annually); 'new wetland area' (£3.24 annually); 'space provided for sustainable agriculture' (£2.61 annually). [153]

Households' average valuation of any project addition was considerably higher in the environmental area (£3.05), compared to the economic area (£1.19) and the social area (£1.16). The combined annual valuation of all project additions was around £36. [153]



Affinity Water

Enhancing natural capital - river restoration

What we know: the idea of restoring rivers is popular and there is appetite to pay for this wider benefit - it links to customers wanting to do the right thing for the environment

The idea of returning rivers to a more ‘natural state’ was popular

The solutions themselves were seen as beneficial, not just for river water quality, but also consumer lifestyle. Future customers were especially keen on nature-based solutions for the positive impact it would have on vegetation and local wildlife. Concerns raised about nature-based solutions centred on the cost of implementation, particularly among those in vulnerable circumstances. With the backdrop of the cost-of-living crisis, participants wanted to know how we would be spending the money and some thought that correcting past mistakes sounded like it would be especially costly. Others were happy pay more, however, thinking about the work that needed to be done now to preserve the environment for their grandchildren and beyond.[134]

> “The fact that they’re trying to rectify these things is really good because it can make such a big difference on so many things like vegetation, animals, and all that kind of stuff. So, I think it’s very cool that they’re doing this.“
> **Future customer** [134]

> “I know people need to be educated, but building education centres and working to increase education, how much of their budget is that going to use and how effective is it going to be?“
> **Domestic customer**[134]

Customers support paying for nature-based solutions

Most customers support go beyond the minimum when investing for river restoration programs[200, 207] and these schemes generate more willingness to pay than others.[153] However the preference amongst customers for an intermediate or high level of investment is fairly evenly split (3 in 10 support intermediate levels, 4 in 10 support higher levels), and nearly 1 in 3 do not wish to go beyond the minimum.[207]

Looking at the details of such investment, participants were given 10 tokens, each representing a 1% increase on their bill, and were asked to allocate the tokens across the four areas that these programs would cover, to show where they would expect the money to be spent. The results showed little difference between the four areas, although nature-based solutions came out marginally on top, with an average of 2.9.[134]

> “Absolutely go further. What excuse do you have for doing the minimum that you can get away with? Why does it take legislation for companies and individuals to take responsibility for their actions?
> **Established Prosperity, Colne**[134]

	Average Number of Tokens Allocated	Number of Tokens Allocated: 6	5	4	3	2	1	0
Reducing abstraction from chalk stream catchments	2.4	2	2	4	7	15	11	3
Nature Based Solutions	2.9	0	4	8	16	11	5	0
Wider Good	2.7	0	2	10	11	11	7	3
Going above and beyond government minimum standards	2.4	0	5	4	7	13	14	1

There is wider benefit to the community

General opinion was that core activities are important, but there should be room to help the wider community too. Cleaning up rivers was regarded highly; this showed Affinity Water wanted to be ‘a pillar to the community’. [134]

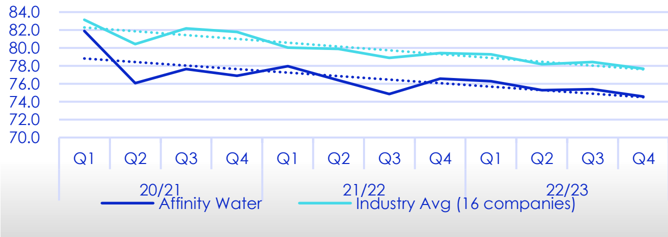
Affinity Water

Our customers

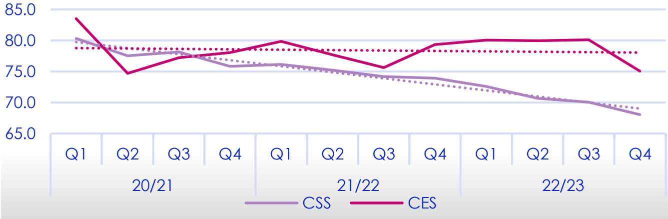
How satisfied are customers with the service they receive?

What we know: Long term satisfaction is trending down, reflecting UK & Industry trends; reversing that trend is going to require significant effort

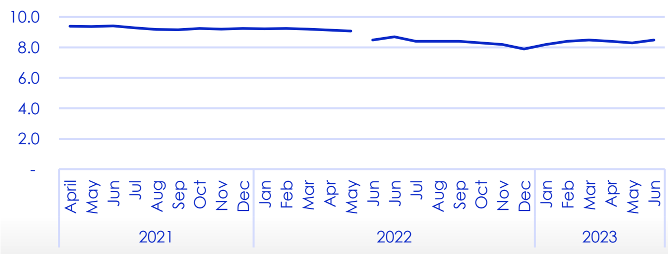
Total C-MeX (CSS & CES) Score & Ranking
Source: Affinity Water[172,198]



CSS vs CES in CMEX
Source: Affinity Water[172,198]



Total CSAT for all customers contacting Affinity
Source: Affinity Water/R&R/Qualtrics



NB CSAT measurement provide was changed in May 2022, so tracking is not continuous

Customer Satisfaction in the UK is in decline

There is some evidence that all ratings of customer service are in decline: the UKCSI shows a steady decline since Covid both at all sector, utility, and water industry level (though not all water companies are included). Water Matters shows overall satisfaction with water-supply-only being stable, with all the decline in satisfaction coming from sewage services.[219,221]

Ofwat/CCW found that those who were in financial difficulty, or younger (which may have an overlap) were less likely to be satisfied with their water companies.[128] 33% believe companies are more interested in profits than providing good service.[128]

There are multiple sources for measuring customer satisfaction of Affinity Water's customers. Main sources are CMeX, (the Industry Measure), the Perceptions Survey, and the Voice of the Customer programme (aka R&R until May 2022, Qualtrics from then on). These measures have also shown decline to a greater or less degree.[198,201]. Though the UKCSI shows Affinity bucking that trend, it should be remembered that the Affinity Water sample in UKCSI is very low and not at all robust [221]

CMeX

We have performed at the bottom end of the market, at best 13th out of 17 for some time, and in the full year scores for 2021-23 we were14th.[135, 172,198] When split into its component service and experience parts, we see that having to contact Affinity Water in the first place leads to a lower level of satisfaction. However, CMeX as a measure is unreliable, due to small samples and convoluted construction that make the data unreliable. Our high volume of billing contacts and web surveys compared to the top-ranking companies is impacting our results. The web surveying method scores lower than telephone surveys due to the absence of a person facilitating the survey. Ofwat recognises this and applies a +5% uplift on web scores. However, the uplift does not result in parity - even after adjustment, telephone surveys score around 10% higher than web surveys across the industry.[90]

Those who rank us positively for CMeX give reasons such as acting quickly, making things smooth and easy, clarity of answers, and helpfulness of staff. Lower scores are driven by increases in the bill, lack of follow-ups, and poor work from technicians.[135]

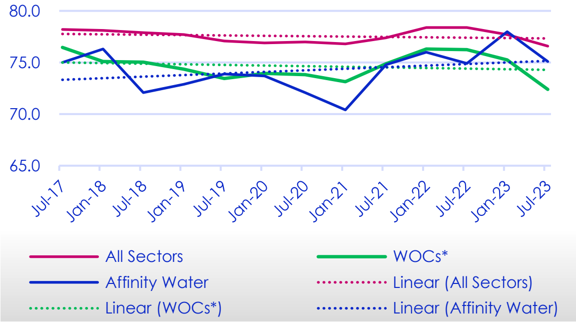
Perception survey

The perception survey randomly samples Affinity Water bill payers, regardless of if they have had recent contact with Affinity Water and asks about overall satisfaction and likelihood to recommend. Measured on an 11-point scale as in CMeX, the satisfaction measured here has been stable over 2021-22, after a rise then sudden fall during 2020-21 that wasn't reflected in CMeX.[21,22,151]

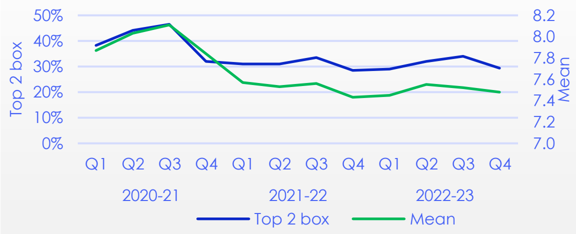
Satisfaction is difficult to judge; most people do not think twice about their water company

Customers have described their relationship with their water company as 'distant' at best, through to 'non-existent', with many unaware of their water company[2,3,4], and Affinity Water is no different[15,59]). This makes customer sentiment harder to interpret; customers may not really have the active engagement to give an informed decision. However, high satisfaction can be achieved: UK Power Networks had the fourth highest performance of all surveyed companies in the ICS Customer Service index, even though utilities as a whole, had the second lowest of the 13 sectors covered.[65]

UK Customer Service Index
Source: UKICS[221]



Overall Customer Satisfaction
Source: DJS Perception survey. [21,22,151,201]



Q. Overall, how satisfied or dissatisfied are you with the service you have received from Affinity Water? Using a scale of '0' to '10', where 0 is 'very dissatisfied' and 10 is 'very satisfied'. n = 400 per quarter

*NB not all companies in this industry are included in these figures

Affinity Water

Reducing customer complaints

What we know: we receive fewer written complaints per connection than others. Complaints also have mild seasonality, likely driven by weather impacts on supply

Complaints at Affinity Water

The Institute of Customer Service identified improved complaints handling as one of six factors that drove improved customer satisfaction in 2021, and increased dissatisfaction with complaint handling as a key cause of the sharp drop in their Customer Satisfaction index in July 2023.[65, 244] Half of the overall CMeX score is derived from customers who have contacted the call centre, which may lead to an over representation of dissatisfied customers in the overall score, and makes improving complaint handling an important strategy to improving customer experience.

Overall complaints to Affinity Water have fallen over the course of 2021-22*, driven by a fall in telephone complaints. This drop was caused by changing processes in the contact centre to give customer advisors more tools to help resolve issues in one call.[145]

The volume of written complaints to Affinity Water are only mildly variable in volume over time. There may be a seasonal effect with Q2 (summer) and Q4 (winter) seeing slightly higher levels than at other times.[122,145] The proportion of complaints to properties dropped a little during 2020-21 – possibly due to Covid-19 having both a "rally round" effect, and work such as the universal metering programme was scaled back or put on hold. With work restarting, the proportion of complaints has risen again. Despite rises in volume, the escalation rate remains under 5%. [122,145]

The largest cause of complaints comes from the universal metering programme, misread meters raising bills, and problems with the home moving process.[145]

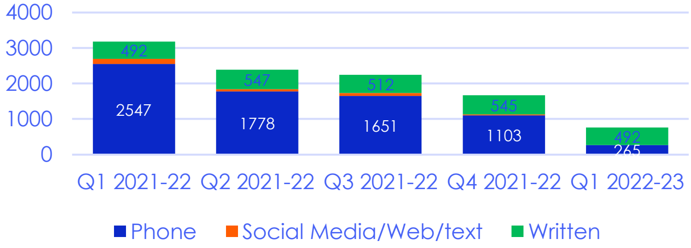
Complaints across the sector

Across the sector, CS found that 1 in 5 UK adults surveyed had a problem with a utility company in the preceding three months, but for Affinity Water the rate was twice that, at 40.4%.[144] However, the UKSCI study is at odds with our own data; only 11% of respondents from the Customer Perceptions Tracker for 2021-22 said they'd experienced a problem in the preceding 12 months.[124]

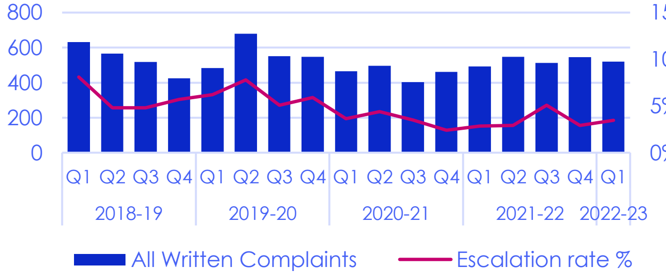
Cross-company comparison showed that Affinity Water fairs better than most, with written complaints per 10k properties being well below average for both initial volume and escalation. A new definition for non-written complaints came into effect in 2021 which meant that these types of complaints are above the median; both telephone and social media complaints are trending down.[122]

The change in processes to allow better first time resolution means Affinity Water now has the second fewest telephone complaints per 10k connections (for 2021-22).[145]

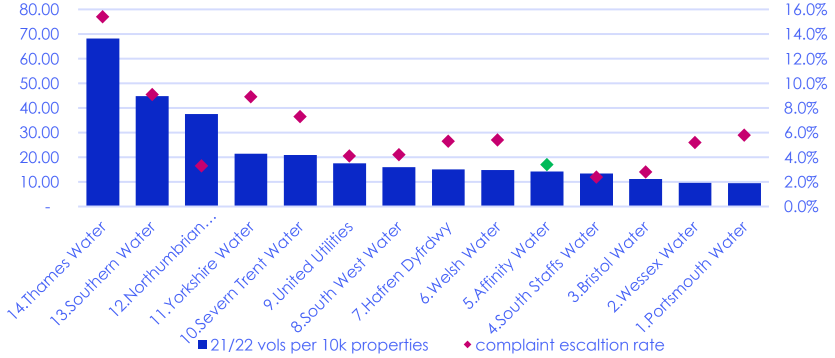
Complaints to Affinity Water:
Source: Affinity 2022[145]



All Written Complaints to CCW
Source: CCW Performance review, June 22[122,145]



21/22 written complaints per 10,000 properties
Source: CCW Performance review June 22[122]



*NB. The next update from CCW is not due until mid September 2023

Delivering a personal customer service

What we know: our customer service is generally considered as 'good' with room to improve with better online access to information and more follow-ups

People are less patient with call centres in general since the pandemic

Water Community respondents reported a loss of patience with call centres in general. Participants have a difficult relationship with contact centres, with some feeling less patient since the pandemic, due to more stress and an increased sense of urgency. Although they are the 'go-to' for more serious and complex issues, they are also frustrating to use and participants tend to have a negative experience of them. Some of the frustration comes from the length of time to get through (blaming this on Covid-19 makes it worse), being disconnected, and having to repeat their issue multiple times to different agents.[149]

Phone calls are often the usual way to reach Affinity Water, but it's not the only desired method

Panel members want a variety of options for contacting Affinity Water. This includes easy-to-use online services, options for both live web chat and email support, and quick access to a human being when reaching out by phone (less than 5 minutes with minimal use of automated switchboards).[148,149] A personalised service delivered by knowledgeable and empathetic staff is seen as the ideal.[148] This is the base experience, the minimum expectation of service performance. Raising the experience beyond that is driven by proactively reaching out, e.g. from checking in with vulnerable customers or reaching out to offer help if there is a missed payment, to partnering with other organisations that can enhance the experience. [148]

Barriers to online methods include knowing whether they will get a response, or if they end up dealing with a 'robot' rather than a person, and lack of feedback on what happens next. Age is also an issue, with older customers being less comfortable. However, for less urgent queries, the flexibility to handle things at a customer's convenience, not just during opening hours, was appealing.[149]

There is also a small group of younger customers who feel that ideally, they should be able to self-serve everything online and never need to contact Affinity at all, or at least never by phone. [148,149]

On the whole, customers seem to be satisfied with customer services

Whilst panel members are generally positive about Affinity Water customer services for general queries, they also point out there are areas that could be improved. Specifically, they say the mid-stages of an issue are well managed, but the start and end points are not yet ideal. They highlight that contact centre staff are often excellent, but Affinity Water lacks easy access to their information – whilst the website is easy to access, the lack of an app and smart metering means they don't have what they need to confidently control their usage. They also feel out of touch with Affinity Water about its projects and goals and want to know more (although given the general reticence on knowing more amongst the wider customer base, this may just be with respect to this panel). [148]

More criticism is given to issue management; whilst it is felt appointments are given in a timely fashion and are generally completed quickly, some mentioned difficulty finding the relevant contact numbers at the start, and a lack of follow-up at the end of a contact.[148]

"The most common thing that frustrates me about contact centres are the long wait times to receive help. I would say I feel the same in terms of patience for wait times."
Digital Families, Dour[149]

"Having different methods of contact such as online chat and email are great, as being stuck on hold with a company for 30+ minutes isn't fun, but also an email is good for a 'send and forget' method of contact, obviously if your query/issue isn't time pressured."
Career Commuters, Wey [148]

"I should be able to do most activities online, at least in the first instance."
New Earner, Lee[149]

"As long as there's a live chat function so I can talk to someone if needed I'm happy to resolve everything online"
Digital Families, Stort

AffinityWater

Exceeding expectations for drinking water quality

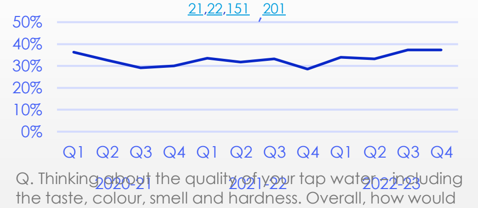
What we know: Clean good tasting water is the number 1 customer priority but customer perceptions are variable and driven by hardness - though few reach out to complain.

We have a good performance on the technical aspects of water quality

The Ofwat Service Delivery Report 2022 showed that, compared to other companies, Affinity Water has had fewer failures of water quality than most, with their Compliance Risk Index being just 0.87, compared to the overall industry figure of 3.23 (0 is the best, 5 the worst), making them the 3rd best performer, improving from 1.31 and 4th place the previous year.[75, 249] Customers are largely unaware of the process behind reaching this level; they know that somehow the water is cleaned, but are unsure how. July 2022 research showed that some were aware of chemicals like chlorine and fluoride being added but beyond that, knowledge was sparse, and some even chose not to know (this group preferred to drink bottled water).[134]

"It's safe, it doesn't smell, it's always available, it's quite cheap and you take it for granted, really."
St Albans, post-family, male[52]

Satisfaction with water quality
Source: DJS Perception survey.[21,22,151,201]



Q. Thinking about the quality of your tap water – including the taste, colour, smell and hardness. Overall, how would you rate your water quality using a scale of '0' to '10', where 0 is 'very dissatisfied' and 10 is 'very satisfied'? n = 400 per quarter

Customer opinion appears to be highly variable; high quality water is taken for granted

Whilst in Q4 2022-23 satisfaction with water quality performed at its highest point in three years, its still only just over a third of respondents, (37.3%)[201] The Sundon water taste testing survey (February 2020) found that the customers interviewed were generally happy with their water taste and smell, their only complaint being the hardness level.[52] Across the last three years, satisfaction with water quality is stable at an average of just 33% (top 2 boxes on a ten-point scale).[21,22,151, 202]

Just 0.2% of contacts to the call centre in Q1 2021 were about water quality.[79] Feedback from Rant & Rave mirrors this low level of complaint, with just 823 surveys received from 1st Jan 2020 to 9th Feb 2022 mentioning water quality – 0.2% of the total. These surveys include Water Quality QoS codes and comments from other codes where the customer has mentioned 'water quality'. The combined average mean CSAT score is 8.40. Several complaints are raised about customer advisors being uninterested and unwilling to investigate.[71]

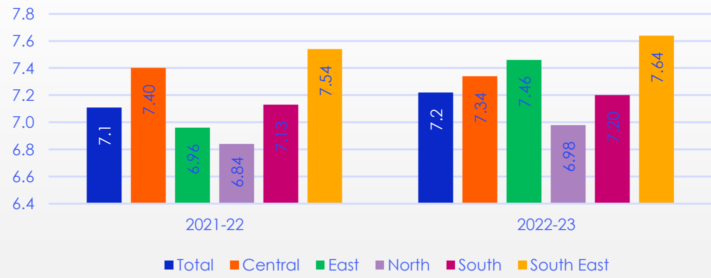
This low level of engagement over water quality further confirms findings from the water community and other qual that good quality water is just taken for granted and is therefore a hygiene factor. When the subject was brought up in focus groups in Summer 2022, the general feeling was this was Affinity Water's job, and respondents trusted us to make the decisions[59, 134] There may also be a regional effect to satisfaction with water quality; evidence is mixed, but strong enough to warrant further enquiry.[52,89, 202]

"Everything becomes scaly and furry. It's a nightmare to clean – and keep things clean – and the kettle has to be de-scaled every week or two."
Luton, family, female[52]

Lead replacement

Out of the five key investment areas (reducing abstraction/environmental restoration, carbon net zero, improving resilience, lead replacement, and hard water) Lead replacement ranked as the highest priority in a representative study, reflecting the highest overall priority in other research for clean, *safe*, drinking water. Just over half of respondents were aware that there are lead pipes in the Affinity Water area and most of those had either checked for them or had them removed. And 48% of participants in the study opted for the highest possible level of investment when allocating spend to the different investment areas.[207] This somewhat conflicts with previous research, which showed a much lower level of awareness and concern, though that was qualitative and not representative.[125]

Water Quality Satisfaction by area
Source: DJS Perception Survey[171,202]



Q. Thinking about the quality of your tap water – including the taste, colour, smell and hardness. Overall, how would you rate your water quality using a scale of '0' to '10', where 0 is 'very dissatisfied' and 10 is 'very satisfied'? n = 400 per quarter in total, ≈ 90 per area

Hardness is a pain point on water quality

Even though hardness is not technically a water quality/safety issue in regulatory terms, they are often intrinsically linked in the minds of the respondents. When water quality was discussed on the Water Community, participants identified five components to water quality: safety, clarity, reliability, softness and tastelessness. For them, Affinity Water only fell short on softness. Unprompted, most wanted Affinity Water to soften water, and didn't understand why they didn't, believing it would solve problems such as leaks, appliances breaking and reduce environmental damage due to the use of fewer chemicals to wash and clean. However, few people understood that hard water has health benefits.[100]

In the priorities studies[200, 207] hard water improvements technically came 4th out of 5, but was scored closely with resilience and environment, well within the margins of error, and when discussed in depth opinions on its importance changed when discussing the potential impacts of softening water (adding extra chemicals to the water, potential environmental impacts), respondents became happier maintaining the status quo[199]

Cost of Living

What we know: Customers worry about all rises in costs, not just water, and there is less concern over water than other bills; its also making customers more cautious towards our plans

Over the last two years, the UK has seen an increasingly severe cost of living crisis, but water bills cause less concern than other household budget items.

As multiple issues force prices everywhere higher more and more people are facing issues with paying bills. The percentage of English bill payers saying they saying they never struggle to pay bills has fallen from 45% in December 2021, to 25% in March 2023, i.e. almost halved in just 18 months. Those say they struggle at least sometimes is now more than half.[210] Amongst Affinity Water's customers 2 in 5 say they struggle to pay bills at least sometimes.[251] The upward pressure on spending has been brought up spontaneously by Affinity Water customers in a variety of engagements, even ones not nominally about the cost of living.[134] And whilst there are some indications that things are improving, those improvements are very slight – water community customers slightly or very worried about household bills was 89% in 2022, but only fell to 84% in 2023.[216]

53% of British adults say they are concerned about the affordability of their water bill, compared to 87% about their energy bills, 80% for food & drink, and 70% for Petrol.[157] Affinity Water overall skews slightly less deprived, and this is reflected in only around 1 in 7 disagree that their bill is affordable.[223] Respondents in focus groups run for Affinity Water have commented that Water is of less concern specifically, and potential rises are often compared to utility bills with the sentiment, "at least its not as bad as the electricity". [134, 200, 213]

Vulnerable customers bear the brunt

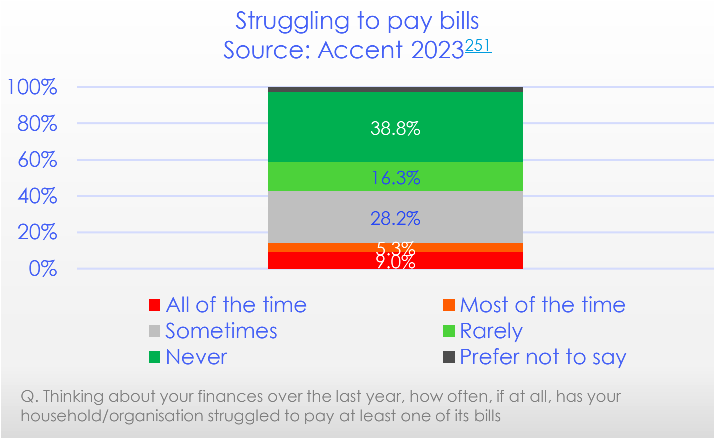
Scope says that disabled people have been particularly hard hit by the cost of living.[169] In 2022 website views on their pages relating to debt and cost of living are up five to seven times on what they were in 202. Two thirds of respondents to their survey say government support will not cover the increases to their energy bills.

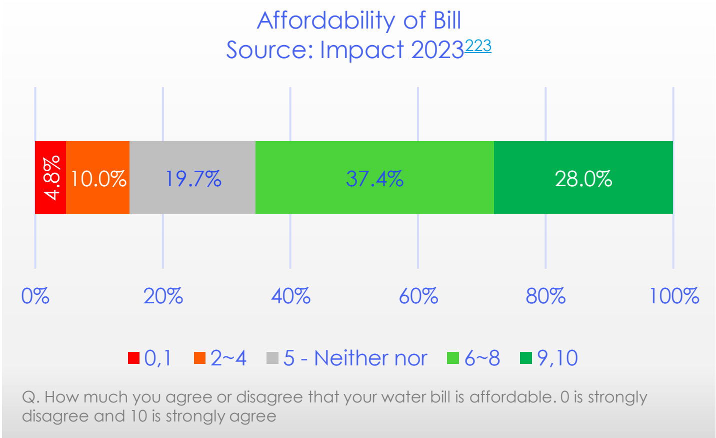
The rising cost of living has had an impact on how people respond to Affinity's plans.

This is most notable in the way affordable bills became more a priority between qual research in the summer of 2022 and quant work in the winter of 2023. Support for expanding the social tariff in particular had a luke-warm reception by Spring of 2023 – Support for low income families in principle was often well received, but by May, appetite to expand the provision was low, with most preferring to maintain the status quo.[143, 214]

"I think it is immensely positive. Water is a right, not privilege and wherever and whenever possible, we must make certain that access to water is independent of means"
Career Commuters, Colne(Summer 2022)[143]

"Not enough money to pay bills and mortgage without worry, the rise in taxes… I worry about my two unborn grandchildren and the NHS."
Comfortable Retirement, Brett (Summer 2023)[216]



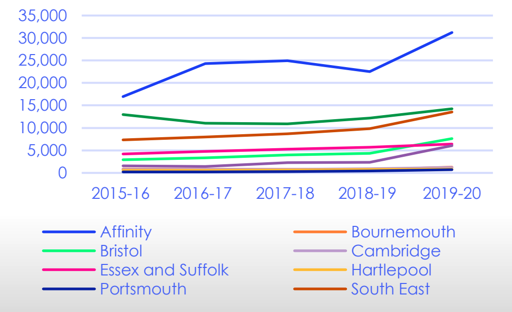


Affinity Water

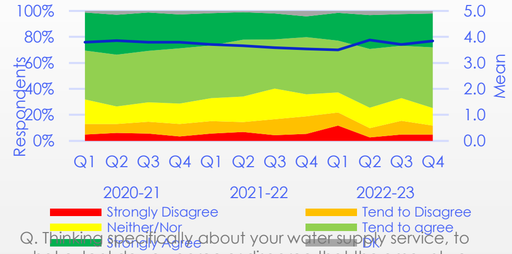
Supporting our vulnerable customers

What we know: vulnerability is a widespread issue for all water companies, but we are particularly affected. Our customers are unaware of how we can help, and some may be reticent to reach out

Customers registered for PSR
Source: CCW, 2020, Water For All[12]



Affordability of bill
Source: DJS Perception survey. [21,22,202]



Q. Thinking specifically about your water supply service, to what extent do you agree or disagree that the amount you pay for your water supply service is affordable for you? n = 400 per quarter

"I don't see it as their problem if I can't pay my bills. I would look for help elsewhere first as utility companies are only trying to make a profit and don't care about their customers."
Feeling The Strain, Wey[86]

Difficulty paying bills is widespread and increasing

In 2019, 3 million households (approximately 11%) across the UK struggled to pay water bills. Before Covid-19, it was estimated that 12% (roughly 1 in 8) customers were in water poverty (where the water bill is more than 3% of household income - there is a tighter measure where that level is raised to 5%).[51] At the more stringent 5% level, approximately 5% of the customer base are in poverty, and just over 5% receive a social tariff; this suggests that Affinity is supporting those in water poverty.[129] There is some evidence that this is keeping bills affordable, as the average affordability scores for Affinity customers has only declined slightly.[21,22] By October 2022, 20% claimed they were struggling to pay water bills, and the proportion claiming to struggle with any bill rose from 12% in December 2021 to 25%.[175] Nearly 1 in 3 also expect that their finances will get a lot worse in the next year, rising to two thirds if those say a bit worse are included.

Affinity Water has the highest level of customers on the Priority Services Register (PSR) of all the water-only companies – unsurprising, given the relative size of Affinity Water. It also has the second highest proportion of customers on a social tariff of those companies (and 4th highest of all companies).[12] Figures for 2021 are not yet available, but the impact of Covid-19 on the economy is likely to have increased the level of people on support, both the PSR and the social tariff. An Ofwat/CCW survey showed that 28% of respondents expected their finances to worsen over the 2022-23 financial year.[102]

Lack of awareness and personal pride are stopping people getting help

Ofwat's December 2022 survey showed that only 28% of English & Wales billpayers were aware of support for those struggling to pay bills, down 5 percentage points on December 2021.[175] A 2020 survey of Affinity customers showed that 42% of all customers were aware of the social tariff, Whilst Affinity Water's perception survey found that more than 7 in 10 of those who said their bills were not affordable were unaware of Affinity Water's assistance programmes.[21,171]

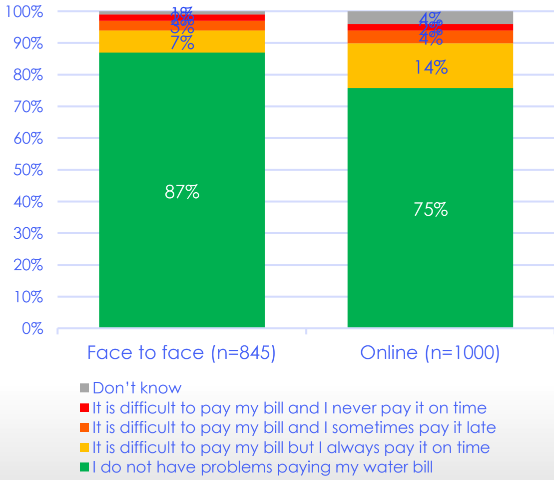
An additional barrier to getting help may be personal pride or a sense of shame that leads them to not want to admit the issues to others, or a belief that they won't get help.[86] In 2018, Ipsos conducted two surveys, face-to-face and online, asking if people had problems paying their bills. The level of admission of problems was much higher in the more anonymous online survey.[72, 73] Other barriers may be language and literacy, due to high levels of immigrant populations in Affinity Water's area.[41]

Discussions around support options are cautiously positive, but concern over bill impact holds back wholehearted support

Suggestions for flexible payments were presented to the Water Community, and whilst it wasn't considered bad, there was much concern that such options might make things worse. Those with struggling finances wanted arrangements that fitted around their income, and emphasised the need for sympathy, rather than being just another case number.[86] However, as 2022 has progressed and the cost of living has become more of an issue, the WC has become more reluctant to support such initiatives, they are concerned over their own ability to pay bills, even if they support the principles.[143]

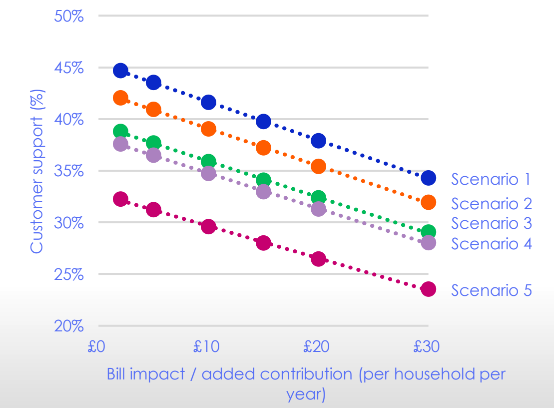
Further research with a representative sample of household customers showed that fewer than half - 47% - were prepared to extend the scheme by paying more but that those who were open to this could increase contributions by up to £14 a year. It does not indicate what demand there might be for cutbacks.[208] A supplemental study showed that no option for extending the social tariff scheme had majority support, what support there is tails of fairly rapidly with increasing bill impact, and that most respondents preferred to maintain the status quo. Of the options presented, those that extended the scheme qualifications were the most popular, the favourite being extending to DLA/PIP claimants with both a one-off discount, and a long term reduced capped charge. This gained 45% of customers supporting it where there was no further bill impact, falling to just under 35% once bill impact reached a £30 yearly increase.[215] Cutting the tariff is very unlikely to happen so it was not considered a realistic answer option for either study. Given the ongoing cost of living crisis, this may need to be revisited if things do not improve.

Customer description of financial security
Source: Ipsos 2018[72, 73]



Q. Which statement best describes your financial situation?

Support for social tariff extension options
Source: Eftec 2023[215]



Acceptable and affordable bills & tariffs

What we know: customers are open to more progressive billing systems, but such tariffs need to be transparent and justified

Previously, customers supported a premium added to the bill to support those in difficulty

In June 2018, as part of the PR19 work, Ipsos found that a majority of Affinity Water customers (63%) were in support of spending more on the social tariff if it allowed them to support more vulnerable customers. No suggested cost was included in the question. 50% also agreed that the tariff should be variable, with those on the lowest incomes getting more support.[72] Research in later 2020 shows that spontaneously, 2 in 4 customers would not be prepared to may more towards the social tariff. When value were shown, the same study showed that support for even up to £1 extra only had active support from 60% of customers. When told about Affinity Water's plans to expand the social tariff, adding 90p to £180 to the plan fewer than half - 46% - actively supported this rise, and 28% actively opposed – the remaining 1 in 4 had no strong opinions. [170] Those that oppose paying more do so largely because they feel it should be funded another way, rather than customer subsidy. Following the cost of living crisis of 2022, more research is needed to gauge currently levels of support.

There is interest in more progressive billing schemes

Whilst only a small proportion of customers think that the current flat rate per litre system is unfair, there are also calls to do more to make the highest users pay more for their excess use.[130, 94] There is some reticence towards the standing charge as well. Most Water Community participants would prefer a purely volumetric model, even with a small per-litre rise in cost so charge is entirely usage based. Even those who are more positive toward the standing charge recognise there is a need to pay for things that are not directly linked to usage, but it still feels unfair that this isn't modified for usage with larger houses paying more.[192]

Both 'split rate' (one rate for essential use, another rate for non-essential use) and 'rising block' tariffs (price per litre increases with consumption) have been discussed on the Water Community. Customers are open to the idea of a split rate tariff as they see it as fair and are keen for water companies to take charge to reduce water usage, although there are also concerns over how essential/non-essential uses are defined, and how these would be policed. [94]

Half of Water Community participants thought a Rising Block tariff would be a fairer system than the current flat rate, and would be effective at reducing demand, and many believed they would not pay more under such a system. However, it was noted that no-one considered themselves a high-volume user; it was always 'others' who had excessive usage.[130]

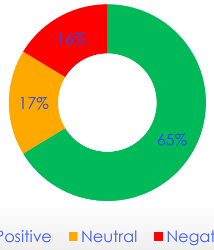
Customers are aware that something needs to be done to reduce water usage overall but, in both cases, concern is expressed that allowance is made for those on low incomes or with medical needs who may need to use more. There is also concern around the rising block tariff, where large households may be penalised. [130]

A larger scale 2-year trial is being launched in summer 2023. It is primarily designed to look at affordability – can costs for supporting those on social tariffs be born in a greater degree by the highest consumers rather than spreading it equally amongst the customer base, and therefore reducing bills for most overall. Impact on usage levels may well be a side effect, and whilst this will be monitored, its not the key effect looked for. It also includes a small allowance within the standing charge, offering the chance to those with the very lowest usage to pay a minimal amount.

"It would be impossible to police the reason folk turn on a tap or if they sneak it out of a hose at midnight."
Comfortable Retirement, Dour[94]

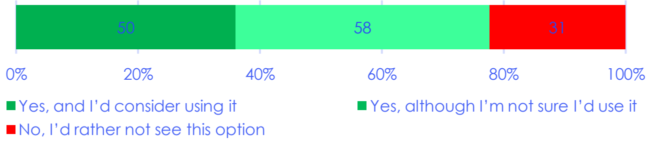
"I think [the split-rate tariff] would help cut down on water usage. It's a "like" not a "like a lot" because I wonder how it would practically be implemented - I wouldn't want to have to be manually logging what I'm using water for, for example!"
New Earner, Pinn[94]

Reaction to Split Tariff Concept
Source: Water Community[94]



Q. Choose a face that best represents how you feel and explain why (n=121)

Q. Would you be happy to see a donation option for WaterAid when you pay your bills online? [93]



Q. Would you be happy to see a donation option for WaterAid when you pay your bills online?

Affinity Water

Communicating with Customers

What we know: People aren't engaged, and even bills can be ignored, especially with digital: More trialling of methods and messages before large scale publication may help improve cut through and salience. SOS shows the impact that large scale campaigns can have, but that impact isn't persistent

Digital methods are preferred for more general communications, but cut through is a problem, even for non-digital methods; letters are preferred for important issues, such as works in the area

When it comes to general communications, customers have a preference for email (82% preferred this over others) – it creates no waste, and is direct and convenient, but people's inboxes are cluttered and it can be hard to cut through. Letters have the advantage of cutting through, but are considered very formal and official. The website acts as an information hub and is assumed to be up to date. [114]

Whilst already engaged customers have expressed an interest in learning more, overall customers are not motivated, with only a third expressing a desire to know more. [22, 114] When it comes to frequency, general updates should ideally be quarterly.

When official works are in progress, an official letter would be the most successful method, as emails are easily missed, and mass calls and text are either screened (ignored) or suspected to be scams, especially where there is low awareness of an issue, (e.g. lead). Personalisation can help reassure customers, as well named contact details.[115, 125]

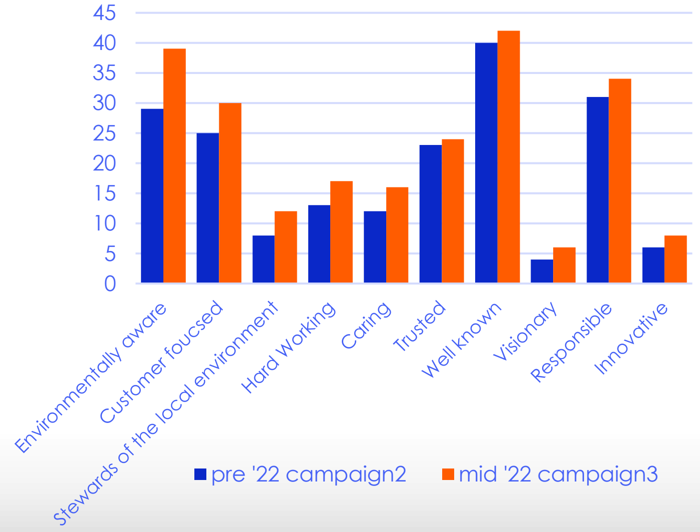
> "Think the last I heard anything about Affinity was during water shortages one summer. Wasn't anything memorable."
> **Career Commuters, Wey**[114]

> "Social media advertising is a great way of grabbing attention to customers."
> **Digital Families, Pinn**[114]

Large campaigns like SOS (Save Our Streams) do work to raise awareness, at least temporarily

Following major advertising campaigns, positive environmental associations with Affinity do improve, often significantly.[189] How long these effects last needs further investigation – awareness of SOS was at 50.5% of all respondents during phase 1, but fell back to 29% before phase 2, and it lifted back to 55% mid phase 2. [85, 156, 189] an industry wide review of water saving campaigns published by CCW also states that the sort of tactical campaign that SOS exemplifies often fails to provide long term change.[218]

Words to describe Affinity Water
Source: Absolute, 2023[189]



Q. Which of the following words and statements would you use to describe Affinity Water

General communications, regardless of delivery method, fail to engage, though social media has appeal

Nationally, few recall seeing direct mail from their company outside of the bill, and at least 1 in 4 admit to not paying attention to the bill itself. At the same time, under a third trust their companies to keep them up to date [128] Less than a third of WC respondents wanted to see information come with a bill. Affinity Water customers are also quite blasé about the general emails, from all sources, and those from Affinity Water are not offering anything new.[114] Research shows that respondents expect Affinity Water to do more to Educate and Inform people of issues, and that they want proof that Affinity Water is investing as it says it will, these may prove more engaging topics than repetitive water saving tips. [56,62, 63 ,87, 114,134]

The original SOS campaign was raised by the Water community as an example of something different and engaging. [114] almost one in 6 WC respondents also highlighted that they wanted to see more on social media. SOS has run two major campaigns now, in April/May 2021, and October to December 2022, with smaller scale activity at other times

Non Household customers say they want clear, professional comms (and not 'threatening' comms when bill is due)[158]

> "Companies are bombarding customers with emails but I find that more often than not these are generic and mostly to try to sell you something else."
> **Comfortable Retirement, Pinn**[114]

Affinity Water

Our community

Spreading the cost of services (intergenerational fairness)

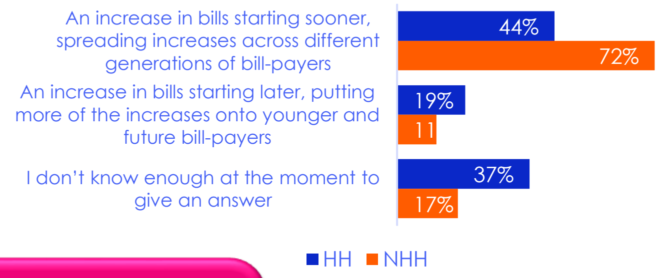
What we know: most customers are in favour of long-term investments for future generations (many assuming that this is how we plan), although there are some resistors

Contributing towards future generations can be a polarising topic, and sympathy can turn quickly

Most are sympathetic and want to help (particularly older people and multi-generational families), whilst others expect future generations to be able to cope, particularly those concerned about the financial impact it may have on them. Customers acknowledge that society has seen significant changes across varying aspects of life over the past years, and many feel that future generations will have numerous opportunities that they themselves did not have. [77,87] Sympathies amongst the water community changed after 2022 turned into an unusually eventful year, the multitude of fast changes creating a sense of pessimism that brought more empathy towards younger generations.[203] However, a quantitative study across the whole customer base in the Summer of 2023 showed that almost half of Affinity Water HH customers were prepared to shoulder a share of the burden now, rather than push it to future generations, and only 1 in 5 wanted to push costs to the next generation.[251]

Innovations in tech, choice and accessibility are seen to open the doors of opportunity for future generations but they recognise that climate change and a *reliance* on tech are creating a precarious world for future generations. There are concerns about how much future generations may have to deal with in the context of their lives. Some however, outright reject that people should pay for the future, especially as future needs can change.[87]

Preference for inter generational phasing
Source: Accent 2023 [251]



"I don't think you can ask people to pay for the future without saying what the money is doing... However, I don't agree with paying for the future generation."
Digital families, Colne[87]

Paying for the future in advance seems not fair for everyone. Some people do not have the extra money for this and cannot afford this. Others are watching what water they use and try not to waste."
Career Commuters, Pinn[87]

Most customers accept the idea of paying to future-proof the water supply and assume we already do

Many customers imagine that the bills that they pay must be used for a variety of things across the water provision journey, including developing and refreshing the infrastructure it relies upon. There is also the sense that, not only Affinity Water, but all companies must/should have ongoing improvement and development as part of their business plan, and therefore this shouldn't be something 'new' but something that has constantly been in place.[87]

Concerns centred on how big the impact on the bill will be may be mitigated by transparency over where the money goes

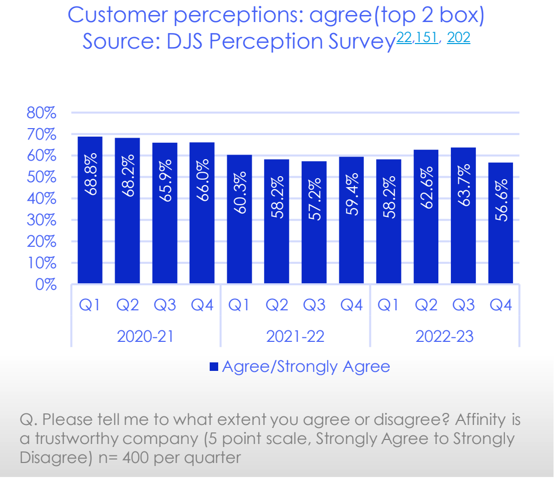
Amongst those who are concerned, many are worried about how drastically this may impact their bills, around which they have built their spending routines. There was concern, particularly for those who are already struggling to make ends meet. These individuals are not seen to be financially able to invest into the future of Affinity Water's infrastructure.[43, 87,203] When asked to chose between two hypothetical situations, trading off bill impact against total project cost, the preference was driven entirely by personal financial circumstances, with no thought to other factors.[203] There are also levels of mistrust around Affinity Water's actions, where this was regarded as an excuse to extract more money from customers to give to shareholders without delivering the investments. However, this is not a problem limited to Affinity Water.[43, 87]

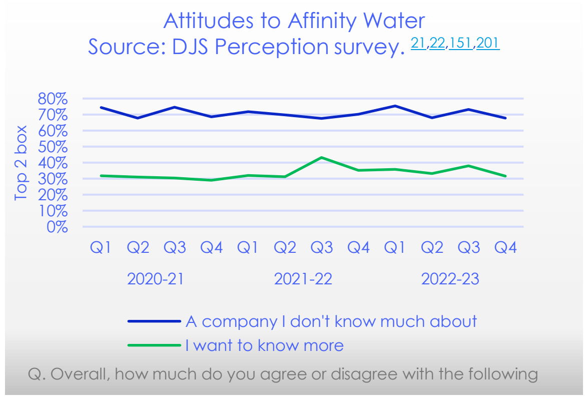
"It's a worry, the finances or our children and we will be the older, financially insecure people. I can't say it sounds like much of a happy retirement! I think we really need to be investing in our collective futures".
Career commuters, Dour[87]

"I am happy to pay for the future with one proviso. The money for these investments needs to be ringfenced to keep it away from shareholders of water companies. This includes using it to pay off debt that shareholders have incurred when they buy companies in leveraged takeovers."
Career commuters, Pinn[87]

Improving trust and transparency

What we know: trust in the industry has fallen since the pandemic, and Affinity Water has followed the trend. Significant improvements will be a challenge through lack of awareness and interest





Trust in corporations for Affinity customers is built on three pillars: ethics, integrity, transparency

Ethics is about treating everyone, customers and employees, fairly, and putting principles before profits, going beyond the bare minimum to 'do the right thing'. Integrity is related to this, focusing on a high level of commitment to brand values, e.g., taking responsibility for their actions, fixing their mistakes, respecting & understanding customer grievances through effective communication. Trusted companies are those that have demonstrated reliability and exceptional customer service; companies without trust are associated with poor customer service, environmental damage, unethical use of customer data and poor websites.[97]

Transparency is key

Affinity Water customers have expressed multiple times that they'd appreciate Affinity Water being more open with its communications.[62, 97, 82] Customers have a really poor understanding of what we do, e.g. being unaware of WINEP[134] or underestimating the cost to clean & deliver water.[160]

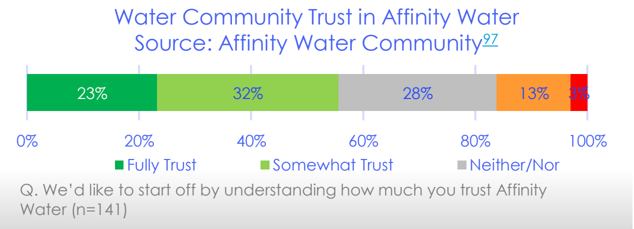
Affinity Water will need to give customers a detailed breakdown of where their money is going. Affinity Water must give customers all the facts so that they do not have to search for information. Whatever is being introduced, such as an increase in bills, needs to be clarified in simple steps. Affinity Water will need to give customers information on what is happening and why.[97]

Trust in Affinity Water faces challenges to building it

Multiple studies by study by Ofwat and CCW in late 2022/ early 2023 showed that across the industry there is relatively little trust and it is in decline since the pandemic after being stable for some years.[210,211, 219] When it comes to providing a reliable service, barely 6 in 10 say they trust water companies; between 64% and 73% say they trust their water company to ensure good quality water.[174, 175] Half of those aware of negative news stories said that they trusted water companies less as a result, especially amongst those already disinclined to trust, creating a downward spiral.[174]

Various measures of trust show that trust in Affinity Water, whilst not terrible, is on the low end for the industry,[123] and is declining alongside the rest of the industry. What looked like a recovery in spring/summer 2022 may have been brought to an end by the prominence of issues with storm overflows in the news in early 2023. [22, 97,151, 202] Those that do trust Affinity Water do so because it delivers their needs through providing consistent, reliable and clean water. Little interaction with Affinity Water means that they haven't encountered issues with their service, which is positive (as with other utilities).[97] Lack of trust is often a reason for rejecting suggestions for new services and investments.[62, 87, 82] in testing the business plan, resistance to bill impacts was largely driven by lack of trust in Affinity to deliver.[213 251, 253]

Building trust may be a challenge due to people being unaware of who their water company is, a remote and hands-off relationship and lack of interest in knowing more. Only 3 in 10 customers say they want to know more about Affinity Water.[15,22, 59,81.] In many research engagements we see that respondents are very unaware of what Affinity Water does, e.g. low awareness of WINEP and underestimating the cost of cleaning and delivering water.[134, 160] There will always be a core of customers who don't believe what we say; a discussion on the Water community where the money from a bill was broken down by share that went to cleaning, delivery, leak fixing etc provoked disbelief from some when they found out that currently (2020-25) no dividends are being paid. They are convinced that money is going to shareholders somehow, and will not be told differently.[160]



"I fully trust Affinity Water as they have offered me a continuous service with no faults so I have had no reason whatsoever not to trust them!"
Digital Family, Colne[97]

"I have not had any real dealings with them, so have no reason to trust or mistrust."
Feeling The Strain, Stort[97]

"My distrust comes with their rhetoric around saving water and being more environmentally friendly, and whether or not it's all talk. A few years ago they were renowned for not working in sustainable ways."
New Earners, Misbourne[97]

AffinityWater

Affinity Water

Resilience

Maintaining a resilient water supply

What we know: customers mainly connect resilience to leaks and bursts and don't automatically link a reliable supply to wider issues of resilience; when explored there was an assumption we plan for most eventualities

UK awareness of resilience issues is mixed

Third party research into resilience issues has found a mixed level of awareness, with some studies finding it low, and others finding it high. One study of southeast water consumers says: '*there is no coherent view on the drivers of customer support for resilience planning and the relevant importance of different factors*.' [42 43] The same is found amongst Affinity customers where the Water Community, made up of those with an active interest in Affinity Water's performance, easily and spontaneously mentioned environmental challenges, and population change, as well as issues with leaks and aging infrastructure. Initial thoughts from respondents in other focus groups didn't go beyond issues with leaks and maintenance.[132,134] Amongst most of Affinity Water's customers, clean water is taken for granted and it is assumed that supply will always be there.[59]

When asked what they wanted Affinity Water to talk to them about, the key areas were socio-political risks, particularly financial ones, despite feeling that it was a less important area of focus. This was closely followed by environmental risks. Operational and asset risks were of less interest. In discussing various communications pieces, the words and phrases that elicited the most positive reaction expressed proactivity towards threats, transparency and fairness.[134] When asked to prioritise resilience amongst a variety of asset investment aims, resilience came first amongst non-household customers, but just fourth amongst household customers. However, the ranking was very close, suggesting that all options were important, and that a low ranking should not be seen as low priority.[200]

"We all take advantage of water because it's on tap. If we lived in a country where we had to get water, then we probably would appreciate it a bit more."
New Earner, Stort[59]

"Loss of water supply sounds very scary. I wouldn't be worried about no water for a day or two, but after that the thought of not having water accessible when I want/need it makes me want to cry."
Career Commuters, Wey[62]

Links to climate change are shaky

Issues with supply are not linked to climate change according to water consumers, whether they are Affinity Water customers or not.[25, 111] It is also hard to link the idea of water scarcity to a country famous for its wet weather, especially when hot weather is often welcomed and people remember huge floods of recent years.[128, 134] Much current communication is too 'polite' and focused on hosepipes and gardens which many consumers do not have, further reducing the relevancy of communications.[25,42]

When asked to think about what might interrupt water supply to Affinity Water customers' homes, they initially focused on leaks and pipe bursts and other operational threats, though once other issues had been discussed, environmental threats become more of a priority. When customers were shown a mood board of various images relating to resilience after discussing issues around it, the most popular images were a deep red heat map of extreme temperatures in Britain in Summer 2022, and an image of plastic pollution in the ocean.[134]

Maintaining supply

When it comes to maintaining supply, Affinity Water customers think leaks should be fixed before anything else. They consider education and demand management next. There is minimal evidence of supply-oriented actions. [56,62, 134]

There appears to be little disagreement to the principle of investing to maintain supply. In 2018, only 3% of residents in Affinity Water's area said they actively opposed the principle of investing to secure future supply though the question wording made disagreement unlikely.[77] The Water Community haven't been asked this directly, although responses on other topics make it clear that investment is welcome, if Affinity Water has fixed leaks, and doesn't use money raised for this purpose to fund profits.[62,87]

Operational and asset-based threats were seen by customers as areas that Affinity Water had most control over, whereas environmental and weather risks were important to mitigate against, despite the lack of control. Third party and socio-political risks were harder to comment on. Third party risks were considered the least important to focus on, whereas socio-political ones were hard to control, and customers were divided on what sort of priority they should take.[134]

AffinityWater

Water resources – options for the future

What we know: most people are unaware of the need to look outside traditional abstraction for supply. Most other options have low understanding and will need a wider conversation to make them appealing

Respondents generally have low awareness of the long-term challenges to supply

Unprompted respondents have mentioned the challenges of climate change and population growth, but are largely unaware of details, and somewhat shocked by the severity.[132,134, 200] This seems to be a widespread issue; a survey in May 2022 found that only 10% of respondents worried about the amount of water available, and drought is associated with other countries such as Australia and South Africa who do not share the British climate.[137]

Reducing leakage is often seen as the first solution, with pushing back against any restrictions on customers not uncommon.[62,83, 200]

More reservoirs are largely positively received, due to familiarity. Other sources raise concerns

People rarely think about the source of their water, beyond 'underground' or 'reservoir'[134,137,] and there is a lack of evidence in the area to understand people's opinions during source changes, although its unlikely that customers would engage with any information on changing source when informed.[137]

Knowledge of different sources is low, particularly those not currently in common use, such as desalination and water transfer.[137] Britain Thinks research in late spring 2022 found that people seem comfortable with reservoirs, as these are familiar and common. Water recycling has so far received a largely negative reaction, due to safety concerns provoking an instinctive 'yuck' reaction.[137] Desalination and water transfer are seen as complex, and there is feeling that such large infrastructure water projects should be a last resort.[137] Desalination has environmental concerns over the perceived intensity of processing and impact on coastal biomes. Water transfers had a largely neutral response, though there was some concern over what the infrastructure requirements might be.

Affinity Water followed this up by asking similar questions on the Water Community panel. The panel had recently covered topics on drought and water shortage, and large-scale water saving at home, e.g., rainwater harvesting. Without prompting, desalination, recycling (including rainwater harvesting) and reservoirs all sprang to mind as alternatives to current abstraction practices. Once shown stimuli summarising four different options (based on the Britain Thinks work, but not as detailed due to time constraints), participants were asked to rate their comfort across the four options. Reservoirs were a clear favourite, being seen as natural, and familiar, but the other options were not discounted, with all three having an average respondent rating of 3+ out of 5. Compared to the more general audience of the Britain Thinks work, Water Community members found recycling had a more positive appeal, especially if their fears around quality and contamination could be allayed with information, or even plant tours.[150]

Impacts on customers from a changing water source

The Britain Thinks research found that implying taste and hardness of water would alter with a change of source elicited a negative reaction, regardless of source.[137] Sundon water taste testing (February 2020) found that the customers interviewed were generally happy with their water taste and smell, with their only complaint being the hardness level.[52] Cross-company testing in May 2022 showed that few people could detect substantial differences in taste.[137]

Creating awareness of any change is likely to be a challenge. The Britain Thinks piece showed that participants preferred a 6-month warning on the change, and both that and the Sundon research indicated at least one written notice is needed, although it is likely anything sent with a bill would be ignored.[52, 128 ,137]

"I think there always has been enough water and I know populations are increasing, but I think that we have sufficient rainfall in the UK and we're a modern enough country that we have enough collection sources and reservoirs; if that's being looked after and if we look after our water and the water companies are looking after their supply, whether it's all the leaks and things, then I do believe there is enough."
Female, ABC1, 35-54, Misbourne[200]

"I would want to see it proven that [desalination] is cost-effective, once it is up and running and does not add pounds to our annual bill. Also, coastal environmental i.e.. marine and bird life is fully protested" ***Comfortable Retirement, Dour***[150]

"I would be happy with using recycled water, if it saves water and/or provides water that would be otherwise lost. It has to be a good idea long-term, even if there is an initial charge. Using a lot of chemicals is a concern but is the lesser of two evils i.e. available water as against chemicals." ***Comfortable Retirement, Dour***[150]

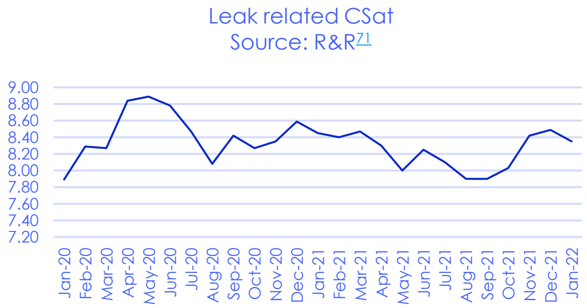
"It's the most obvious and practicable solution in many (perhaps most) places. The graphic mentions cost but I imagine the alternatives are far costlier. My main concern would be the potential to become contaminated making the water harmful to wildlife and people alike", ***Comfortable Retirement, Lee***[150]

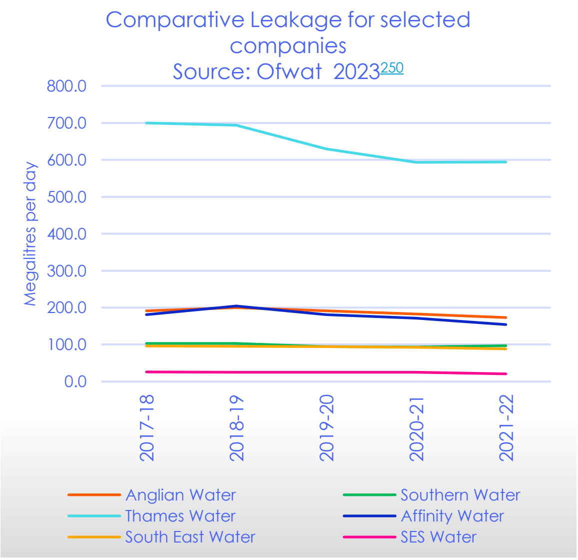
"I'm not thrilled about [water recycling] at all. All water companies have made mistakes with water, like leaking sewage into the sea among other things. I don't feel they could be trusted to make all the water safe." ***Digital Family, Dour***[150]

Affinity Water

Reducing leakage

What we know: customers are concerned about leaks and expect us to be dealing with those before handing any increased costs onto them for additional supplies





Customers are concerned about leaks

Leakage is the most emotive topic to consumers across the county, and one that exacerbates other issues. . Customers believe that leaks are fundamentally responsible for and within the control of water companies. When issues such as CEO payments and TUBs arrive, it is felt that tubs can be avoided if less leaks, which creates resentment and lack of compliance. Any efforts to reduce usage are insignificant compared to what's wasted, and profits are unjust as a result[211]

Leaks are a subject where the Water Community are very vocal.[78, 225] There is an expectation that Affinity Water will protect the customers from the cost of internal leaks and protect the environment from the impact of the wasted water. Those who care strongly about the environment are most likely to be concerned with external leaks.[78]

The Water Community members are going to be more vocal than most customers, but it reflects findings in other research and other companies that have similar findings - that leaks are something water companies have complete control over and are just not doing enough to fix.[137, 211] This has also come up in multiple studies with other Affinity Water customers who spontaneously brought up concerns about leaks, and an expectation that these are addressed before any demands are made of customers. [111, 134, 200] Where people are asked to prioritise different issues, leaks frequently comes top or near the top. [152, 200, 207, 251]

> "Number 1. If there is money haemorrhaging out of one's bank account (for whatever reason), one fixes that first before deciding which investments one should make!"
> **Established Prosperity, Wey**[78]

Issues with leaks make up a notable proportion of calls and feedback

In Q1 2021, leak-related calls made up 1.4% of all contacts (0.4% were customer-side leaks.) From January 2020 to Feb 2022, leak-related feedback on R&R made up 3.6% of all feedback in that period. The average CSAT was 8.31, compared to the total feedback mean of 9.16.[71]

> "I feel top priority should be put on water main leaks as the loss of water is damaging to the environment and undermines most other savings which are made."
> **Established Prosperity, Stort**[78]

Whilst leaks are substantial, customers are likely to resent being asked to pay more

Leaks are an issue that pervades other research, with the issue being raised multiple times.[111, 200,219] When other ideas and plans were presented to the Water Community, leaks were raised as an issue to be dealt with before any price rises are made.[62] In focus groups on environmental plans and resilience, fixing links before doing other things is also raised.[132,134]

Messaging around leaks had a positive impact, at least in the short term

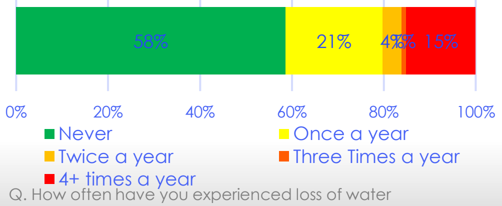
TV & Radio Advertising in early 2022 around leakage seemed to produce a short term results The brand metrics for Q1 2022-23, the first quarter after the campaign, showed a significant increase in ratings for 'cares for the environment' and 'cares about my local area the previous quarter, but fell back to pre-advertising levels by the following quarter, [139, 171] Comparing those who recall seeing the campaign with those who haven't - those who do recall it are much more likely to agree with statements about Affinity Water's commitment to the environment and fixing leaks than those who haven't, by a wide margin. This supports the idea that raising awareness about our work does change opinions, at least in the short term. This campaign focused on how Affinity is proactive in finding leaks[78]; later 3rd party research highlighted a perceptions of a lack of pro-activity was key in not building trust.[211]

Affinity Water

Reducing low pressure events

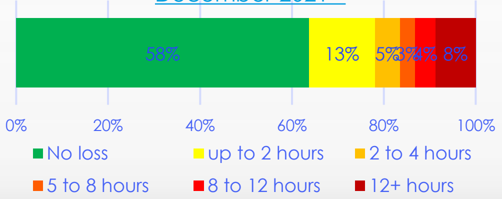
What we know: poor pressure has an emotional and practical impact; whilst it may affect many customers, very few reach out and tell us

Frequency of loss of Water Pressure
Source: Water Community December 2021[55]



Q. How often have you experienced loss of water pressure (n=141)

Length of loss of Water Pressure
Source: Water Community December 2021[55]



Q. How often have you experienced loss of water pressure (n=141)

Most customers are happy

The Water Community customer panel showed that most customers are happy with their water pressure, with others having low pressure incidents once or twice a year.

38% of respondents had experienced low pressure - whilst there is some tolerance of short-term loss created by issues outside Affinity's control, there is less acceptance of pressure loss caused by Affinity Water's actions or lack thereof.[55]

Stakeholders considered minimising low-pressure incidents as a low priority, with some noting that customers might not even notice incidents, and that any event lasting less than 24 hours is insignificant.[80]

Even if they experience low pressure, they don't complain

Relatively few people call Affinity Water about pressure-related issues. Out of 649,492 inbound contacts in Q1 2021, just 2,295 included matters that were registered under pressure-related codes – 0.3% of all contacts.[79]

Research in 2017 showed that those affected felt that low pressure was something they 'had to put up with', being unaware of the causes and if they could be fixed.[81]

People who call for low pressure accounted for 1% of all R&R feedback, with an overall CSat score of 8.35 (vs 9.18 in total). Dissatisfied customers cite poor call handling and long wait times for investigation/repair as reasons for dissatisfaction, rather than the low pressure itself, but the call centre questionnaire talks about the call centre experience, rather than the source of the complaint.[71]

When prompted, customers are frustrated - they want proactivity and clear communication

Those with low water pressure see it as a frustration that can impact their daily lives and the routines of those who live in their home.[55] Customers expect much more proactivity from Affinity Water to avoid low pressure and to communicate what they're doing.[55, 81]

Low pressure often rates fairly low in tests of priorities, overshadowed by options around maintaining water supply and quality

Spring 2023 research shows that whilst low pressure has the highest level of priority for improvement after leakage (61% of HH respondents, and 43% of NHH) when explicitly asked, other areas have more impact when indirect methods are used. This research showed that intermittent low pressure had the least impact on household customers; permanent low pressure ranked higher, but after long unplanned interruptions and equally with Do Not Drink notices.[208] Ofwat ODI work doesn't look at permanent low pressure, only unexpected low pressure, and finds that sensitivity towards that is in the lower half of the pack for Household customers, though its slightly higher for Non-Household customers.[185, 240]

"It's frustrating, especially nowadays when we're always being told to conserve water as much as possible, sometimes it takes days, if not more than a week to get it fixed and/or they don't get fixed properly and burst again a few days later." **New Earner, Misbourne**[55]

"I have to make a choice with my electric shower - either I get good water pressure but then the water's cold, or I get bad water pressure and the water's warm/hot." **Career Commuters, Wey**[55]

"I could not accept reasons such as faulty equipment, inadequate pumping stations, because I think the water board should be planning ahead for those instances." **Modest Mid-Life, Colne**[55]

AffinityWater

Willingness to Pay

What we know: the average customers would pay for a 10% improvement in key areas would be £22.88.

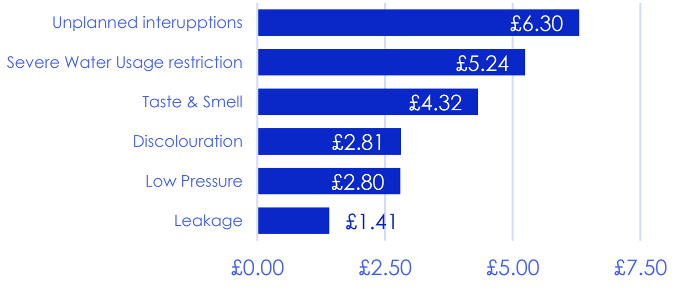
Valuing potential improvements showed there was tolerance for a relatively large increase in the bill

Eftec's valuations work looked at how much people would be willing to pay for a 10% improvement on current levels for five service areas. Improvement to leakage comes in quite low, but this may because there is a high level of service expected here, and participants do not think they should pay more for something they think they should already be getting.[208]

Valuations work done by Eftec on Affinity Water's behalf evaluated a smaller set of events, to a more granulated timescale. In this analysis low pressure came higher up the rankings, having more impact than shorter (hours long) unexpected interruptions, and boiled water notices are below even this.[208]

The Summer 2022 Priorities research demonstrated that there is appetite for greater investment, and customers would (in principle) accept a greater bill impact than the one we have proposed, which has been limited by what we a physically able to deliver.[207]

WTP for 10% Improvement
Source: Eftec[208]



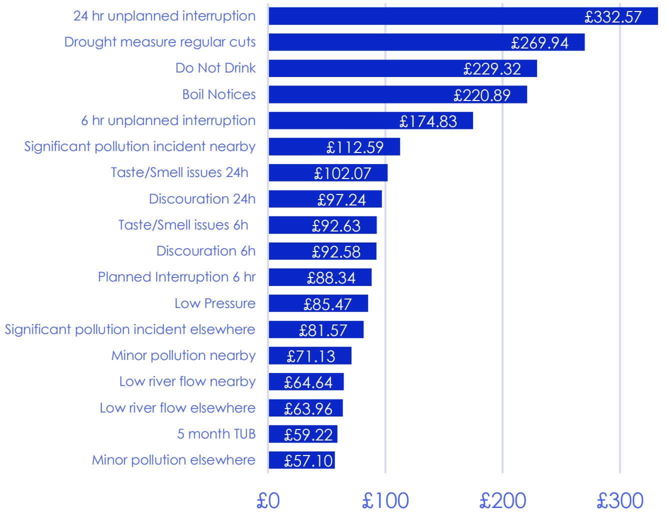
Acceptable compensation values for various supply impacts highlights the value placed on a safe and plentiful supply

Ofwat undertook research to calculate the level of compensation people would need to tolerate a range of negative incidents, and the results largely reflect customer priorities: Unexpected loss of supply has the most impact *, followed by regular cut offs during drought conditions. After that is unsafe water (e.g. boil notices and do not drink notices), and then quality issues around discolouration, taste and smell. Low pressure and low flow in local rivers are much lower priorities.[239],[240].

However, question wording on these studies emphasise impact on a customers' households, which would necessarily move environmental related issues further down the ranking.[241]

Non Household customers were broadly similar – though regular cuts to supply in drought conditions was considered more impactful than unexpected interruptions, in contrary to the national results. Again environmental issues are less likely to be considered impactful, so values for incidents there are much lower than for loss of supply.[240]

Compensation Values for selected Incidents
Source: PJM Economics[240]



*Sewage flooding was by far the most impactful incident overall, but as Affinity Water is a WOC, this does not apply

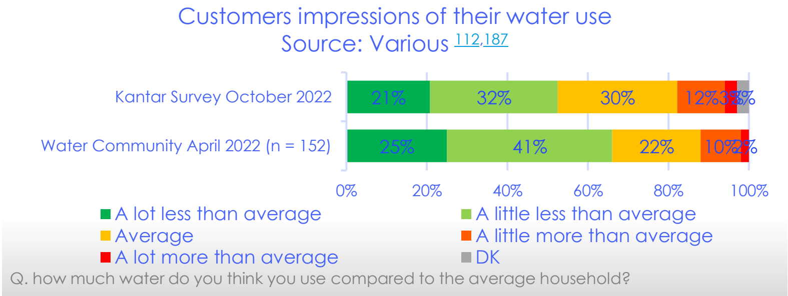
Helping our customers to reduce demand #1

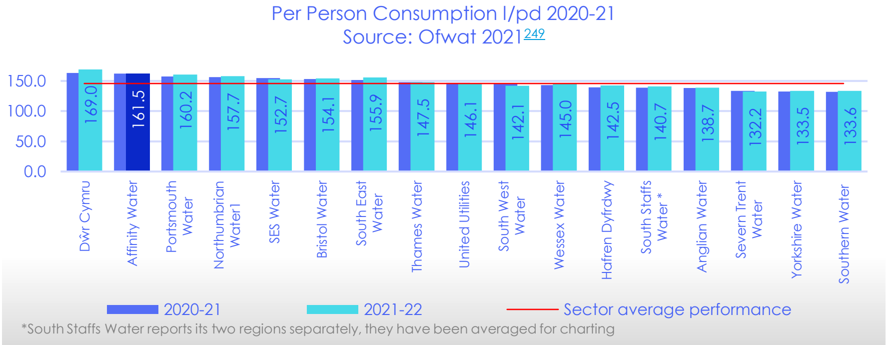
What we know: our customers use a lot of water with no real understanding of how much, and no conviction that they really need to use less

Respondents have little idea how much water they really use

Respondents struggle to quantify and report their water usage; much comes from frequent subconscious daily routines.[1, 187, 218] Quantities are hard to conceptualise[107], and anyone not living alone[1] does not get a full household view of the use of others. CCW also found that there was some denial of irresponsible behaviours. This is reflected in other research; before Covid-19, 94% of customers believed they were medium or low water users, and 88% believed they used the same or less than similar households, suggesting that they have no objective conception of their usage.[95] After covid this situation hasn't changed much, with 83% saying they use average or less.[187] At the same time over three quarters of Affinity Water customers think that "other people" wastewater in their homes and gardens.[187]

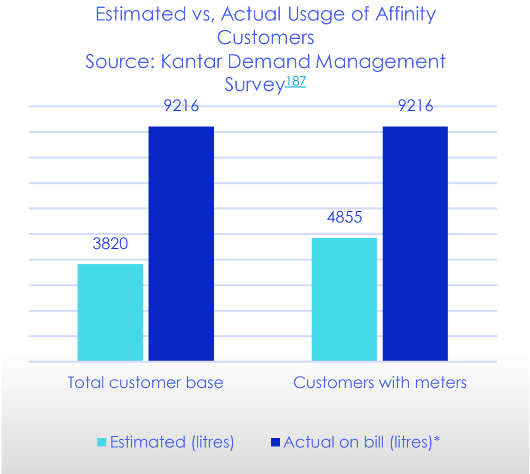
This is confirmed for Affinity Water customers with research amongst a representative sample of customers, as well as the customer panel and the SOS Mailing list.[111, 112, 187] Furthermore, only a third said their household needed to reduce its water consumption.[95] The Sundon taste test work also showed that the Affinity customers interviewed also had no real idea of how much water they used.[52] This contrasts with actual consumption that shows Affinity Water customers have the second highest consumption in England & Wales.[75] The Covid-19 pandemic has also had an impact, with daily PCC increasing. Some of this change will be permanent as people move to more home-working but should also reduce a little as leisure facilities reopen and travel restrictions are lifted.[96] New designs for the bill do include comparative usage, but only for metered customers, and currently only 65% of customers have a meter.





There is some suggestion that there are few commonalities by usage level

Average water use for 2021-22 was 161l/pp/pd, a decrease of just a third of a litre on the previous year, showing that patterns of use from lockdown aren't changing very fast.[249] It is the second largest on any water company. Analysis of nearly 200,000 households in the Affinity Water Area by Per Capita Consumption level shows that each PCC level has few clear defining features. Within each group, regardless of how much or little is used per day, there is a notable level of diversity in household types. The lowest users (PPC of 150 l/pd) are more likely to be financially stretched, suggesting that cost does play a role in managing demand, and implying that current costs are not high enough to deter even average users.[154]



Evidence points to broadly three types of consumer attitude to water saving

The WRSE (2021) drought research indicates there are three different types of person when it comes to saving water: *Resisters*, *Persuadables*, and *Believers*[25]. A similar set of archetypes was found amongst the Affinity Water Community, when asked about actions they take to save water (*Irregular Water Savers*, with low willingness to change; *Habit Changers*, who try, short of serious financial commitments; *Engaged Eco Leaders*, who are highly engaged).[63] In both cases, these personas were described but not quantified.

Helping our customers to reduce demand #2

What we know: current usage is at 162 litres per person/per day, but metering alone won't be enough

Pre-Covid-19 modelling suggested that installing a meter would save anywhere from 3 to 27 litres per person (pp) per day (pd). (This is still not enough to get 162 litres/pp/pd down to 110 litres/pp/pd)

This modelling was conducted on subgroups based on the ACORN geodemographic groupings, rather than the whole customer base, to take into account different family and property types. However, it doesn't appear to have gone beyond the point of switching to metered bills.[104]

Home Water Efficiency Checks (HWEC) had strong appeal amongst the more highly motivated customers (from the Water Community and the SOS mailing list), especially the leak check and the provision of free water-saving devices.[111]

Further knowledge of usage is helpful, and accurate awareness of usage is key to reducing PCC.[141] Reading meters is difficult for customers, often due to location or disability, so the inclusion of previous usage data for context on the bill is welcomed, although comparing usage to six months is not ideal, as this fails to take into account seasonal change. The household comparison feature is also welcome, and normative comparisons like these have been shown in other places to produce anywhere up to a 5% drop in household consumption.[120,140, 141]

Customers are generally positive when it comes to increased metering as they believe it's fair to pay for what you use

Whilst some lower income customers are less keen, due to an assumption of increased costs, many Affinity Water customers are happy to see an increased level of metering, believing it is the fairest way to pay, as long as provision is made for those who may have high usage due to health needs.[111] However, asking for more frequent manual meter readings was not welcomed, as many have difficulties reading their meter, even if they know where it is, and there is an expectation of app-integrated smart meters, rather than manual ones.[112, 113]

The Demand Management Strategy research also showed that there was interest in Water Efficiency Labelling, especially if a form similar to the familiar energy ratings for electrical appliances, and the rating guaranteed by an independent body.[111, 164] However, this interest is expressed as something to be considered as part of the purchase decision, rather than a prime driver.[164] It is worth noting that this research is conducted with Water Community members, and people from the SOS mailing list, who are probably more motivated and interested than the population as a whole.

But there is an expectation that meters will be just one tool in a suite of measures to help reduce demand

There is evidence that installing a meter alone doesn't actually change awareness levels of the impact of the water they use – The CCW Water Awareness Index is the same for those with meters and those without.[133] Multiple sources shows that customers want to see a variety of ways to reduce demand, not just installing meters. People would mention things like variable tariffs, water efficiency labelling, and better comms and education [112, 237, 248] (Though it should be noted that respondents largely seem to think its others that need educating, rather than themselves.) There is also an expectation now that meters aren't just meters, but smart meters as are seen in the energy industry.[248]

Incentives are currently focused on reduction, rather than maintenance of low usage

Reducing demand is going to be particularly challenging as many customers do not believe their water use needs to change. Most believe they are already doing as much as they can to reduce water.[112]

The WC (Jan 2022) shows that the current incentives for usage reduction (10 x £50 gift vouchers for anyone who reduces their usage) is not the most popular option. The most popular financial options are 'money off your next bill', and direct refunds; free months are considered, but customers are concerned this may result in wastefulness that counters the savings. Emails around behaviour change were not considered to be useful, and other suggestions made included an app to track usage and visualise impact.[63]

"I like the way Fitbit displays a number of metrics in a lovely infographic type way. The AW app could **display my daily water usage, it could give me a goal to enter and, as the circles show, fill the circle once I've reached my goal.** Or, if I stay under the goal, it could be coloured green, if I reach it, it could be yellow and if I overuse, it could go red." **Career Commuters, Wey** [113]

"I'd like the labels to be done by an official body rather than the product maker, otherwise I would not trust them!" **Career Commuter, Lee** [164]

AffinityWater

Footnotes

Behaviour Change #1

What we know: Changing behaviours is hard and leaks from Affinity excuse poor behaviour from those who don't want to change, and disheartens those who do

Impetus to change is low; it's not personally pertinent and pointless in the face of leaks

Impetus to change behaviour is low: just over 1 in 4 actually believe that water shortages are likely to affect them.[187] There is little appetite for change amongst Affinity Water customers, and they are not unique; nationally half of respondents already believe they are doing as much as they can.[128]. However, in most conversations about reducing demand, the number of leaks from Affinity pipes is brought up. It justifies making no effort amongst those who do not wish to change, and seriously demotivates those who are trying as they feel their hard work is invalidated. [187]. This is not just an Affinity Water issue, but something known across the industry since at least 2018, and hasn't gone away.[211,217].

Metering is believed to be the most likely way to change behaviours

Increasing metering is seen as the most motivating way to encourage more water usage, as people need constant feedback to change, and many being motivated to reduce usage solely by cost.[112, 217, 218] There is an assumption that a meter makes things easier, however this approval is strongly linked to making meter readings easy, as fewer than half said their meter is easy to access, or smart, and the idea of more frequent meter readings by hand in an age of smart-meters is dismissed. [112]

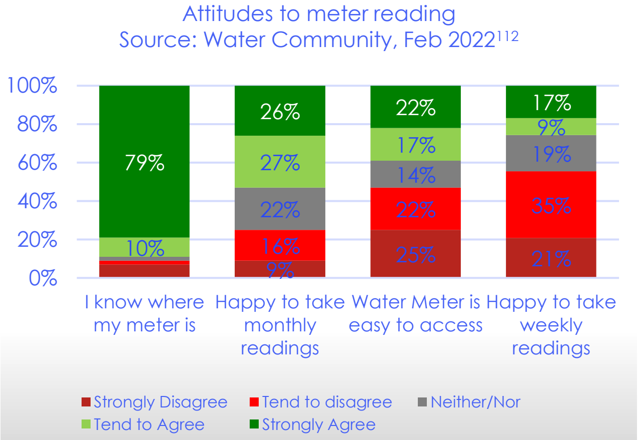
Other help from Affinity Water has mixed appeal

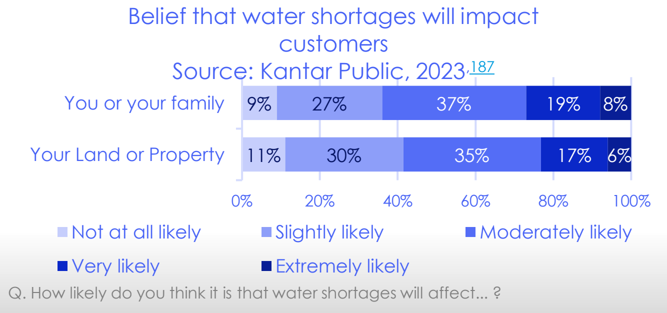
Communications around water saving tips was a lukewarm idea, with just 1 in 4 very or extremely interested in such an email.[63]

The appeal of HWECS is also tepid. At best 1 in 4 of customers are likely to request one (Though 2 in 5 would probably take one if offered); nearly half are not going to request one.[187] WC members said they found the concept intrusive and patronising, with the main appeal being leak checks (linking back to the money saving driver).[112]

87% of WC respondents were interested in High Water Usage alerts, 62% by email, 32% by text. Triggers for such an alert are variable, with some suggesting sudden changes, and others when approaching a customer's average monthly usage. [112]

In early 2022, 93% of respondents were in favour of water labelling, though it was most considered on large priced items such as washing machines and toilets. Smaller items such as taps and shower heads have a greater sense of being generic, so the efficiency is less considered. Fewer said they were likely to consider labelling on pressure-washers and dishwashers, but this is likely due to lower ownership/usage of these devices.[112]

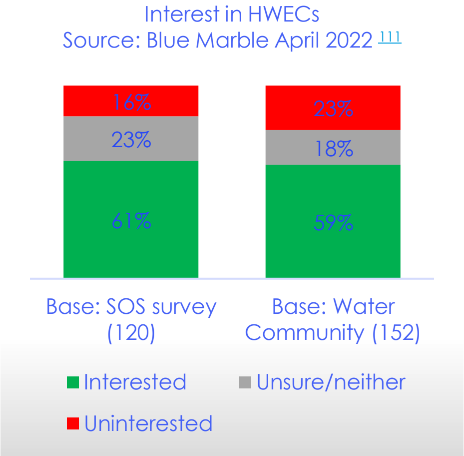




"[The Water Meter]'s in an awkward place and would much prefer it was used like the smart meters for electricity and gas."
New Earners, Lee[112]

"There's definitely more I could do [to save water] but its not really a problem that I don't"
Modest Midlife, older family[187]

"Until [Affinity Water] fix their leaks- some 28% of water usage – I have no interest in taking responsibility on"
Kantar Survey respondent[187]



Behaviour Change #2

What we know: increasing frequency of even the less relevant behaviours could decrease PCC

There is work to be done to give people the right information about the best habits

Customers have a poor understanding of how much water common behaviours save, and more needs to be done to educate consumers with the right information.[187]

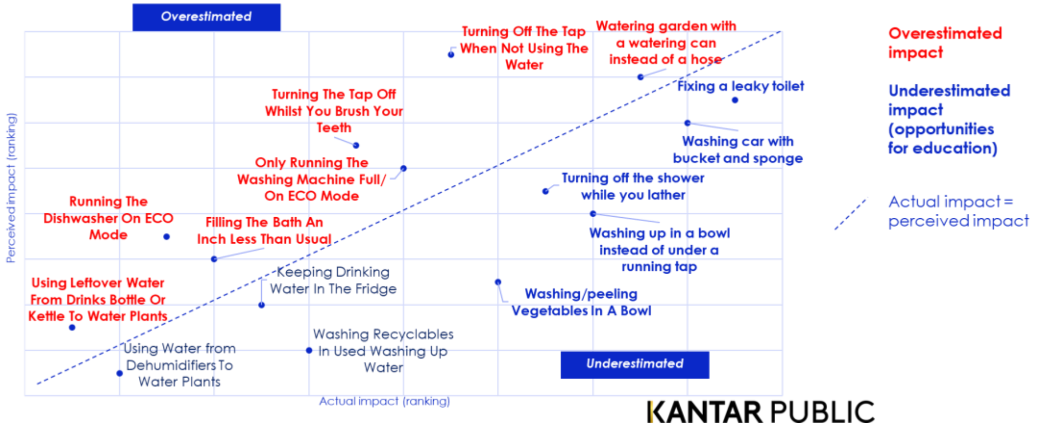
Whilst some behaviours are irrelevant, there's a number of behaviours where savings could be made if the frequency of a habit could be increased, e.g. keeping drinking water in the fridge.[187]

Two thirds of respondents consider some water waste inevitable. The same proportion believe they can save water if they wanted to, and just 12% believe that it is hard to do so. However, just over 1 in 4 think there is no point until water companies fix more. Qualitative research has shown that some wastage is also morally justifiable and just and accepted as part of everyday life [187]

Hygiene trumps water-saving

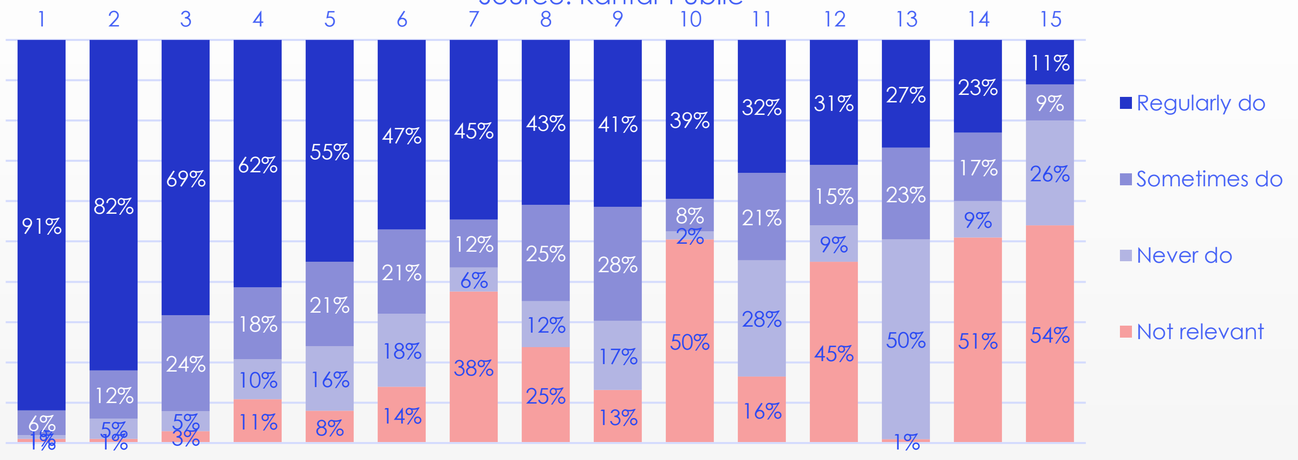
In any perceived compromise between water usage and hygiene, hygiene wins, e.g. people would rather have smaller flushes, flush less often. However, what counts as an acceptable level of "hygiene" varies considerably. E.g. some people believe that having a washing up bowl in the sink is unhygienic. Others have no issue with leaving urine in the toilet bowl rather than flushing.[187]

Showering behaviours are harder to adapt. Most refuse to countenance turning the shower off during lathering and shampooing, though shortening a shower by two minutes was better received.[187] However, even that can be a step too far – few of the water community even tried when asked; those that did already claimed they had very short showers, [188]



KANTAR PUBLIC

Frequency of selected water use habits
Source: Kantar Public[187]



1 Turning off the tap when not using the water
2 Turning the tap off whilst you brush your teeth
3 Only running the washing machine full and on ECO mode
4 Washing/peeling vegetables in a bowl
5 Washing up in a bowl instead of under a running tap
6 Keeping drinking water in the fridge
7 Running the dishwasher on ECO mode
8 Watering garden with a watering can instead of a hose
9 Using leftover water from drinks bottle to water plants
10 Fixing a leaky toilet
11 Washing recyclables in used washing up water
12 Washing the car with a bucket and sponge
13 Turning off the shower while you lather
14 Filling the bath an inch less than usual
15 Using water from dehumidifiers to water plants

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Sources

Sources

What Customers Want is an evolving document. As such, reference materials may be superseded or updated. References that are no longer valid have been removed from the list.

Item	Date	Source	Title/Topic	Method	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
1	20/06/21	CCW	Sink Sense: Kitchen sink habits caught on camera	O	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Sink-sense-Kitchen-sink-habits-caught-on-camera.pdf	3.0	3.0	3.0	3.0	3 – Demand Management
2	Feb-21	CCW	WaterVoice - Views of current and future bill payers	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/WaterVoice-February-2021.pdf	2.7	3.0	3.0	2.0	3 – Billing & Tariffs 1 – Environment, Vulnerability
3	30/10/2019	CCW	Vulnerability in the Water sector	-	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Vulnerability-in-the-water-sector.pdf	1.7	2.0	1.0	2.0	3 - Vulnerability
4	26/05/21	CCW	Low income households' experiences of water bill affordability and support	D	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Affordability-research-report-2021.pdf	2.7	3.0	3.0	2.0	3 - Billing & tariffs, Vulnerability
5	Jun-21	CCW	Water voice May- June 2020	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/WaterVoice-May-Report.pdf	2.3	2.0	2.0	3.0	3 – Vulnerability 2 – Billing & Tariffs, Demand Management
12	30/10/2020	CCW/Ofwat	Water for All report and Vulnerability Manifesto	K	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Water-for-All-Water-Affordability-and-Vulnerability-Report-2019-20%20(1).pdf	1.0	1.0	1.0	1.0	3 - Billing & tariffs, Vulnerability
15	Dec-20	Copasetic Research	Brand purpose , testing new bill,	Go	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/20210111%20Copasetic%20Research%20Debrief%20Affinity,%20Creative%20Development%2011.1.21%20Final.pptx?d=waefc9a4306a044318da37082bed96d80	2.2	1.5	2.0	3.0	3 – Customer Satisfaction & branding 2 – Demand management, Environment 1 - Community
21	Apr-21	DJS	Perception survey - Annual Results	T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/AFW_7187_Customer%20Perceptions%20Annual%20Report_06052021.pptx?d=we151b18cc1fd40f696437de2d06f7ba1	1.5	1.0	1.5	2.0	3 – Customer Satisfaction 1 – Water Quality, Billing & Tariffs, Demand Management, Metering, Supply
22	Jan-21	DJS	Perception Survey - Q3 2021	T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/AFW_7187_Customer%20Perceptions%20Survey_Quarter%203%2020202021%20(Oct-Jan).pdf	1.5	1.0	1.5	2.0	3 – Customer Satisfaction 1 – Water Quality, Billing & Tariffs, Demand Management, Metering, Supply
25	Jun-21	WRSE	Drought plan coms	Go	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/3469PRE01_Drought%20plan%20comms%20development_qual_v4.pdf	2.3	2.0	2.0	3.0	3 – Supply 2 – Environment 1 – Demand Management, Metering, Assets management, Customer Satisfaction
41	Feb-20	Northern Gas Networks'	Stakeholder Submission	-	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/NGN%20Stakeholder%20Submission%20Part%202%202020.pdf	1.0	1.0	1.0	1.0	n/a
42	Feb-21	WRMP	Part A	D	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/WRSE%20Customer%20Preferences_Part%20A%20Evidence%20Review_Final%20Report_eftec%20ICS_February%202021.pdf	3.0	3.0	3.0	3.0	1 – Demand management, Supply, Environment, Asset Management
43	Feb-21	WRMP	Part B	Go	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/WRSE%20Customer%20Preferences_Part%20B%20Deliberative%20Research_Final%20Report_eftec%20%20ICS_February%202021.docx?d=w82a87a65a55144e9a16be1f95de26a5f	3.0	3.0	3.0	3.0	1 – Water Quality
50	Jul-21	Water UK	Water UK response to Ofwat's consultation PR24 and beyond – Creating tomorrow together	-	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Water%20UK%20response%20to%20Ofwat%E2%80%99s%20consultation%20PR24%20and%20beyond.pdf	1.0	1.0	1.0	1.0	n/a
51	Apr-21	Water UK	Quantitative analysis of water poverty in England and Wales	M	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Quantitative%20analysis%20of%20water%20poverty%20in%20England%20and%20Wales.pdf	3.0	3.0	3.0	3.0	3 – Vulnerability 2- Demand Management
52	Feb. 2020	Affinity	Sundon Tap Water Quality	Gf	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/AFF_7036_Tap%20water%20research.Report_25.02.20_v3%20(3).pptx?d=w5c2cf614f5d84dd08830c8893da48b6d	2.3	3.0	2.0	2.0	3 – Supply 1 – Water Quality, Environment

Sources

Item	Date	Source	Title/Topic	Method	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
55	Dec -21	Water Community	Topic 10: Low pressure	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/10.%20Low%20water%20pressure.pptx?d=w39ca9c044e444b0aa519cbfe3f2b1c22	2.0	2.0	2.0	2.0	3 – Supply 1 – Water Quality
56	Dec-21	Water Community	Topic 9: Net Zero	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/09%20Net%20Zero%20Policy.pptx?d=wb3be6c2c07404b7b8316d4367ecc203c	2.0	2.0	2.0	2.0	3 - Environment
59	Oct-21	Water Community	topic 1: Water Attitudes & Habits	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/01%20Water%20Attitudes%20and%20habits.pptx.pdf	2.0	2.0	2.0	2.0	1 – Water Quality, Low Pressure, Billing & Tariffs, Demand Management, Supply, Environment, Customer Satisfaction
62	Nov-21	Water Community	Topic 5:Exploration into Climate Change	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/05%20Exploration%20into%20climate%20change_051121%20-%20FINAL.pptx?d=w4d69a5d0b3064dd2af69278ec19778a8	2.0	2.0	2.0	2.0	3 – Environment
63	Feb-22	Water Community	Topic 14: Behaviour Change Incentives	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/14.%20%20Behaviour%20Change.pptx?d=w83e8ec2ed7464152b8d59bbd978813ca	2.3	2.0	2.0	3.0	3 – Demand Management 2 – Customer Satisfaction
65	Jan-22	UKCSI	ICS UKCSI Exec Summary January 2022	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/ICS-UKCSI-Exec-Summary_Jan22.pdf	1.3	1.0	1.0	2.0	3 – Customer Satisfaction
71	Feb-22	Affinity/R&R	R&R Topics	V	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Topics.pptx?d=w0cb989577b6a49d8ac0152db3f8b7815	1.3	1.0	1.0	2.0	1 – Water Quality, Low Pressure, Billing & Tariffs, Supply
72	Jun-18	Ipsos	Appendix 10 Affinity water Business Plan acceptability research	F	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Appendix%2010%20Ipsos%20MORI%20%20June%202018%20Affinity%20Water%20Business%20Plan%20Acceptability%20Survey%20Research%20report.docx?d=wde09b7ed31d2479dbc232c6333630866	2.5	2.5	2.0	3.0	3 – Billing & Tariffs
73	Aug-18	Ipsos	Appendix 11 Phase 3 final acceptability survey	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Appendix%2011%20Ipsos%20MORI%20%20August%202018%20%20Phase%203%20Final%20Acceptability%20Survey%20Research%20report.pdf	2.5	2.5	2.0	3.0	3 – Billing & Tariffs
75	Nov-21	Ofwat	Service delivery report 2020-21	D	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Service-Delivery-Report-2020-2021.pdf	2.0	2.0	2.0	2.0	1 - Water Quality, Low pressure, Demand Management, Metering, Supply, Environment, Asset management, Vulnerability, Customer Satisfaction, Community
77	Aug-18	Blue Marble	Additional Resilience Investment Research: Online Customer Survey Findings	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Appendix%2012%20Blue%20Marble%20August%202018%20Affinity%20Water%20Resilience%20Investment%20Full%20Report.pdf	2.7	2.0	3.0	3.0	3 – Billing 1 – Supply, Environment, Asset Management, Customer Satisfaction, Community
78	Feb-22	Water Community	15. Leakages	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/15.%20Leakages.pptx?d=w5053d25b4bca4dd096f79bbf2be5e5a1	2.0	2.0	2.0	2.0	3 – Asset Management 2 – Customer Satisfaction 1 - Environment
79	May-21	Affinity	Q1 2021 inbound contacts	M	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Q1%202021%20Inbound%20Contacts%20by%20QOS.xlsx?d=w7ea90fb007804dbb99c43c1a52e66819	1.7	1.0	2.0	2.0	3 – Customer Satisfaction
80	Jun-18	Traverse	Draft Water Resources Management Plan 2020 PR19 draft Business Plan 2020 Stakeholder -- 25 80 Engagement Summary Report	Gf	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Appendix%209%20Traverse,%20June%202018,%20dWRMP_draft%20Business%20Plan%20Stakeholder%20Engagement%20Summary%20Report.pdf	2.3	2.0	2.0	3.0	2 – Environment, Asset Management 1 – Water Quality, Low Pressure, Demand Management, Metering, Supply, Community
81	Dec-17	Ipsos-MORI	Vulnerability & Disruption Depth Interviews	D	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/17-062192-01%20-%20Affinity%20Water%20depth%20interviews%20-%20Summary%20Report%20-%20v2%20-%201.._.docx?d=w6f334095427f4ddf9f1a13ce9216fe1e	2.0	2.0	2.0	2.0	3 – Supply, Vulnerability
82	Jul-16	Blue Marble	Pre-SDS Consultation Online survey findings	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Appendix%203%20Blue%20Marble%20July%202016%20Pre-SDS%20consultation%20on-line%20survey.pptx?d=wdf2eb37ec70b4f0fa210bf9e8ed77c64	2.0	2.0	2.0	2.0	2 – Environment 1 – Supply, Assent Management, Customer Satisfaction
83	Oct-21	Water Community	Topic 2: Climate Change Attitudes & Priorities	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/02%20Climate%20Change%20attitudes%20and%20priorities%20151021.pptx?d=w68fb95bcd8654fb0965499f3130823cb	2.0	2.0	2.0	2.0	3 – Environment
84	Oct-21	Water Community	Topic 4 : The Meaning of Community	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/04%20The%20Meaning%20of%20Community.pptx?d=we5af9b2fb3eb4856bb6a99be8a895e2d	2.0	2.0	2.0	2.0	3 - Community

Sources

Item	Date	Source	Title/Topic	Method	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
85	Aug-21	Absolute Research	Save Our Streams Stage 2 debrief	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/FINAL%20Affinity%20SOS%20second%20stage%20Debrief%20Issued%209.8.21%20v3%20(2).pdf	2.2	2.0	2.0	2.0	3 – Demand Management, Customer Satisfaction 1 – Supply
86	Nov-21	Water Community	Topic 7: Transient Vulnerability & flexible Payments	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/07%20Transient%20Vulnerability%20and%20Flexible%20Payments_261121%20-%20FINAL.pptx?d=we3689b7230eb42f8bf383b77910b6f8b	2.0	2.0	2.0	2.0	3 – Vulnerability 1 – Billing & Tariffs
87	Dec-21	Water Community	Topic 8: Explorations into Inter Generational Fairness	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/08%20Exploration%20into%20Intergenerational%20Fairness_FINAL.pptx?d=w8e31d8faddf944f4b2aae24058d72fdf	2.0	2.0	2.0	2.0	2 – Billing & tariffs, Asset Management 1 – Community
89	Jan-22	DJS	Q3 Perception Survey Data table	T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/ARUP7380_W3_JL.xlsx?d=w36177fa7c8254d579d9826355870fd32	2.0	1.0	2.0	3.0	3 – Customer Satisfaction 1 – Water Quality, Billing & Tariffs, Demand management, Metering, Supply,
90	Jan-22	Affinity	Q3 2021-22 CMEX Performance Survey	W/T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Q3%2021_22%20C-MeX%20Service%20Performance%20Summary.pptx?d=w111f017a5edd411faa2c75b7b379c9f8	1.3	1.0	1.0	2.0	2 – Billing & Tariffs 1 – Water Quality, Low Pressure, Metering, Supply, Customer Satisfaction
92	September 2021	Accent	2021 Cmex & DMeX final report	W/T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/2020-21-C-MeX-D-MeX-Final-Report.pdf	1.7	1.0	2.0	2.0	3 – Customer Satisfaction
93	Dec-21	Water Community	Microdonations	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/10.%20Microdonations.pptx?d=waaa395535a204bbbafa4862f04f6f2d1	1.3	1.0	1.0	2.0	3 – Billing & Tariffs
94	Nov-21	Water Community	Topic 6: Customer Evaluation of Split Rate Tariff	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/06%20Customer%20evaluation%20of%20a%20split-rate%20tariff_191121.pptx?d=wf052feb9897b40e2a9d1d0f5c7893592	2.0	2.0	2.0	2.0	3 – Billing & Tariffs
95	Nov-17	Ipsos	Usage & Water Quality Survey	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/17-054328-01%20AW%202020%20Water%20usage%20summary_V2_291117.pptx?d=w9f8279e3218742d0bebc846e747b8c05	1.3	1.0	1.0	2.0	2 – Water Quality, Demand Management
96	Feb-21	Water Community	topic 16: Covid New Normal	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/16.%20The%20New%20Normal_Final.pptx?d=wa57cdf65b184422fbdeaa370e3ae9b20	2.0	2.0	2.0	2.0	2 – Demand Management
97	Jan-22	Water Community	Topic 12: Trust & Corporations	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/12.%20%20Trust%20and%20corporations.pptx?d=w6f6be75e25ae4b34a5a30f88981200a2	2.0	2.0	2.0	2.0	2 – Community
99	Apr-20	Blue Marble	Perceptions Survey Data Tables	T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/AW1920.xlsx?d=w1d431ea0ba2a41989b766b3d772e4b88	1.7	1.0	1.0	3.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
100	Mar-22	Water Community	Topic 19: Water Quality #1	P	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/19.%20%20Water%20Quality%20.pptx?d=w4495335426a44ef8afad32cea28251d7	1.3	2.0	1.0	1.0	3 – Water Quality
102	01/04/2022	Ofwat / CCW	Customer Spotlight: people's views and experiences of water	W/T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/Customer-spotlight-report-2022.pdf	1.0	1.0	1.0	1.0	2 - Billing & tariffs, Environment, Customer Satisfaction
103	01/04/2022	DJS	Customer perception survey Q4 results	T	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/AFW_7380_Customer%20Perceptions%20Survey_Quarter%204%202021_22%20(Jan-Mar)_v2.pptx?d=w7ff00a87fad74caca400913351003c59	1.3	1.0	1.0	2.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
104	01/04/2020	Atkins	PCC Data Insights and Analysis	M	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/DM08%20Atkins%20PCC%20Data%20Analysis%20for%20Affinity%20Water%20v1.0%20Issued%2009%2004%2020%20(002).pdf	2.0	2.0	2.0	2.0	3 – Demand Management
107	01/06/2018	Accent/PJM Economics	Exploration of Supply Outage Compensation Levels	W	https://affinitywaterltd.sharepoint.com/sites/w_CIE/Research%20Library/PJM%20Interruptions%20to%20supply%20compensation%20work%20P3206pre01_FinalReport_v1.pptx?d=wa54efd8691314c4790656fc9ff33b453	2.0	1.0	2.0	3.0	3 – Billing & Tariffs, Supply
109	26/09/2019	ONS	English Indices of Deprivation File 7	K	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EUszPcfTI5FCkMeJlSL3RHEBhQHoroezTax6g6RmKXK6iQ?e=eUewIk	1.7	1.0	1.0	3.0	3 – Vulnerability 1 – Billing & Tariffs
111	27/04/2022	Blue Marble	Demand Management Customer Feedback	W/P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/Edtce7NR8WBNuuG3qJIJjowBLs2D3mSF5HwV8tK6zCcmgg?e=uBwJkU	1.7	2.0	1.0	2.0	3 – Demand Management 2 - Metering

Sources

Item	Date	Source	Title/Topic	Methodology	Links	Robustness Scoring Overall	Design	Method	Interpretation	Key Subject Contribution level
112	19/04/2022	incling	Topic 20: Demand Management Survey	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EYOJ7AePvxROjEQ5SYuhEkQBVfc2HPykeQoNqYhz9sZDoQ?e=7o2dwW	2.3	2.0	2.0	3.0	3 – Demand Management 2 - Metering
113	25/04/2022	incling	Topic 21: Apps & Digital Delivery	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EcOINrCNNNNIjHz27hu2nbgBhbMxpiymQ8KpuY6BRZ0UpQ?e=Fka8ng	2.3	2.0	2.0	3.0	2 – Customer Satisfaction 1 – Billing & Tariffs, Demand Management
114	31/01/2022	incling	Topic 13: Communication Preferences	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EdfrZ0IqFARKtbJB1kCbanwBxMw0TXUAW3kEPbMiQbX-5A?e=cR1rhC	2.3	2.0	2.0	3.0	1 – Customer Satisfaction
125	10/06/2021	Blue Marble	Lead Pipe Replacement 1 Customer research Stage 1 interim report	Go	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ERFnYtbOegROocg1be3392QBuH_IWDbOZ6Pn1X7RtnfDXA?e=WXk9FS	3.0	3.0	3.0	3.0	2 – Water Quality 1 – Asset Management, Customer Satisfaction
128	06/04/2022	Savanta	Customer spotlight: People's views and experiences of water (full report)	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ETSGW3ijCJlCjjLpcZFSR0oBSYPebqe0yt0uScBXEVdj1Q?e=Q5JV2B	2.0	2.0	2.0	2.0	2 – Billing & Tariffs, Demand Management 1 – Water Quality, Supply
129	08/10/2021	Economic Insight	The Role for Rising Block Tariffs in Water Affordability	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EU6Exz2MGcJGopoIDQJ8EJMB60MnYtwKiCPZ5s7bkQNaHA?e=CfUsmX	2.2	2.0	2.0	2.5	3 – Billing & Tariffs
130	15/08/2022	incling	Topic 33. Rising Block Tariffs	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EXXIPBFi4VBNiebIjWv2EukBHPGXLVr3_uw_dV7f6JV-JA?e=3QDxah	2.3	2.0	2.0	3.0	3 – Billing & Tariffs
131	15/07/2022	incling	Topic 30. Optimism Survey	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWHlbIzKGfNInRjc62wNGyABSr6ZxCHNb12FHbEeLOs7cg?e=1nb6Yc	2.3	2.0	2.0	3.0	2 – Customer Service 1 – Billing & Tariffs, Asset Management, Environment
132	11/07/2022	incling	Topic 29 - Resilience live chat notes	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EX50ENL2C5ZMseW2hjjIOkMBoIBIr0gonafgABTXEWezow?e=ydlwXU	1.8	1.5	1.0	3.0	2 – Asset Management, Supply
133	04/05/2022	CCW	Water Awareness 2022	T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ET5E2uj6nmdFro3Hmhx-6ZIBQy_4dcSL-RAu1ylsf2zSDQ?e=n7dXsw	2.8	3.0	3.0	2.5	3 – Demand Management
134	12/09/2022	Impact MR	Affinity Water PR24 Customer Engagement	Go/D	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EQcPiehgalhLlliZzuPIhZ8B3Tn51OxAkvZzmNImj8dDjA?e=rcjFI0	3.0	3.0	3.0	3.0	3 – Water Quality, Environment 2 – Asset management, Supply
135	03/05/2022	Jonny Auld	CMeX Full Year & Q4 results 2021-22	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ETghEnB1_CdBtYExOmOHVZUBe-fjBmeYA0j4RnOtv22SwQ?e=NshhZm	1.0	1.0	1.0	1.0	3 – Customer Satisfaction 1 – Billing & Tariff
137	30/06/2022	Britain Thinks	Water Club: Changes of Source	K/Gf/W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWBU8usaKxhIsGGIATRHgj4BuZCWXeT-UIppnNCxc4i1kQ?e=KbwE0A	2.8	3.0	3.0	2.5	3 – Supply, Water Quality 1 – Environment, Customer Satisfaction
138	07/06/2022	Absolute Market Research	Leakage Consumer Communication Programme Research: Post Campaign	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Ea3-mB16PpZJtDcWuVG7uTUBuzSOUodW0QPDebNWt2CbRQ?e=CfkRaJ	1.3	1.0	1.0	2.0	3 – Asset Management 2 - Customer Satisfaction
139	01/07/2022	DJS	Customer perceptions survey: quarter 1 results	T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EfuxOTijYLFHhYcPn3k6OH0B0xBSnGA-tZgXm9Qglg2ZMg?e=H9mybt	1.5	1.0	1.5	2.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
140	25/10/2021	incling	Topic 03: Water Bill Evaluation	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EVaS_zMChfRPriPOfNtv1UoBhhEvyYQCPCRtXs7Kk2c20g?e=bRr7ez	1.8	2.0	1.5	2.0	3 – Billing & Tariffs 1 – Customer Satisfaction
141	05/07/2022	Kantar Public	Water-use behaviours and initiatives aimed at reducing water use	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EaMnoUnwSeRCgKmObhC0mEcBgHtezHrCtkq5pMsewaWxtQ?e=fSUg5D	3.0	3.0	3.0	3.0	3 – Demand Management
142	10/01/2022	incling	Topic 11 Public Value	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbGjJa-iHM9BjfnAtt7uMP4B-LDxUXRgpDTO4eqr6M77kw?e=x8J8Xg	2.0	2.0	2.0	2.0	2 – Customer Satisfaction, Community 1 – Environment
143	02/05/2022	incling	Topic 22 Price Review	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EQqae65qS6JLpTEE32UmlaUBAEuFoa1qAlFf_1hewpoAww?e=6G7qQU	2.0	2.0	2.0	2.0	3 – Environment 2 – Billings & Tariff, Vulnerability
144	01/07/2022	Institute of Customer Service	UK Customer Satisfaction Index July 2022 Utilities Sector Report	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EZ9-Um1SBAhNq5Ke68Do8yEBBTVCGIZyeFt9bjtALIWHbg?e=moHQnX	1.8	2.0	1.0	2.5	3 – Customer Satisfaction

Sources

Item	Date	Source	Title/Topic	Method	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
145	15/09/2022	Affinity	CCW Q1 22/23 review	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EXuV2oQqsVNDhKbowWlimHIBPVxMKwl-ve4s8pNuW4pWRQ?e=Pzi668	1.2	1.0	1.0	1.5	3 – Customer Satisfaction 1 – Billing & Tariffs, Metering
146	16/05/2022	incling	Topic 23: Sewage	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ETUEdj7DKcZJnC0AlI9fhRwBNGsrfa8-DJ49wrzMjgYKXA?e=ub7Vw2	2.0	2.0	2.0	2.0	1 – Environment, Customer Satisfaction
147	22/09/2022	CCW	Household customer written complaint handling by water companies in England and Wales	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EUKVX8uzYj9Ks1YNfzDhUpsBptg23Tq3-LJMAuHJ77MiCQ?e=pKFltY	2.7	2.0	3.0	3.0	3 – Customer Satisfaction
148	20/05/2022	incling	Topic 24; Customer Service	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EVN1ScutcM9PtHZJHv-V-T4BnizupPRdAwfdUZFKdDUUeg?e=W0cMoX	2.0	2.0	2.0	2.0	3 – Customer Satisfaction
149	30/09/2022	incling	Topic 38: Call Centres	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EU_0pmk4x-ZAsvPr1vKC01oBe1GdioAkgDP_IG52-CRnKw?e=xiLAjn	2.0	2.0	2.0	2.0	3 – Customer Satisfaction 1 – Billing & Tariffs
150	07/10/2022	incling	Topic 39: Water Sources	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ESFliJV_xaZJjuN5XE2OOjYBsdFQBrMIzEcUL67fjnjJsg?e=OZhEfS	2.0	2.0	2.0	2.0	3 – Supply 2 – Water Quality 1 – Asset management
151	13/10/2022	DJS	Q2 2022-23 Brand Perceptions Survey Q2 Results	T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYUvbUKt7BpPupK1ii4WxIABTp6k71jH643ZiAcM-yklNw?e=rN3jPa	1.5	1.0	1.5	2.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
152	24/05/2022	Incling	Topic 28: CCG KLOE Statements	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWNVYNXuxZRJusuKPlJzp48BLW_OnoOOqkqfJtisOGDmLA?e=kk6bp2	2.0	2.0	2.0	2.0	1 – Billing & Tariffs, Environment, Customer Satisfaction, Community
153	31/08/2022	PJM Economics/Accent	Customer preferences on added value for large resource schemes	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ES0cB8w2I6NMhPpByj1nGhYBAVLAz9sjucLijGgpdfxPRQ?e=QBjqnJ	3.0	3.0	3.0	3.0	3 – Billing & Tariffs 1 – Environment, Asset Management, Customer Satisfaction
154	29/04/2022	CACI	Introducing your Water Use Personas	M	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbmTHpslqk1FhuzcJpK2vmABLwNUltk244Zw2ihtIlJehw?e=5ylCFN	1.7	2.0	2.0	1.0	3 – Demand Management 1 – Vulnerability
156	08/11/2022	Absolute	Save Our Streams Phase 4 debrief	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EXE-po8UJm9Nmf3JLzugcpAB_QSwUgT52b8GbNC-mbvouQ?e=4erEOP	1.0	1.0	1.0	1.0	3 – customer Satisfaction 2 – Demand Management
157	01/09/2022	Blue Marble	What does Britain want the new Prime Minister to do about the cost of living?	X	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbKb6TjD6UFLkIA_8n7hei4B0dXIL_gx_f0NA5zEYyPsfA?e=qdpqxW	1.7	2.0	1.0	2.0	2 – Billing & Tariffs, Vulnerability
158	13/08/2022	Blue Marble	Promoting water efficiency among Non Household customers Understanding how wholesalers can motivate usage reduction	D	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Efdt2uz-88dAl8XTiL4NCHYBZyfc0qyHAumUL6crdpM0HA?e=eALSoa	2.3	2.0	2.0	3.0	3 – Demand Management
159	26/10/2022	Affinity	C-MeX Q2 22/23 Performance Review	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Ed10_eX9YERPk_SeWW_8-dQB0Q9Zu_oKoiDqxAURpMgWCA?e=c3fy0r	1.3	1.0	1.0	2.0	3 – Customer Satisfaction 2 – Billing & Tariffs
160	05/11/2022	incling	Topic 41 Bill Breakdown	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EQ5lzRELFP9GmQYiA8uceegBTKnxqKTjV5LFlxJ_He1MGA?e=mGlgkW	2.0	2.0	2.0	2.0	3 – Billing & Tariffs
164	24/10/2022	Incling	Topic 37. Efficiency labelling	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EY2lBkA0i7xEovAL7VET5e8B8plIsW_TxC-uhAaR5AbdYg?e=00clSK	2.0	2.0	2.0	2.0	3 – Environment 2 – Demand Management
169	17/11/2022	Scope	Do The Right Thing: Supporting disabled people through the cost of living crisis	K/X	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EcF8U5lujl9IkE28ZA-B2twB3bh1VDDfKjW3HKV2AVMCJg?e=TqYaUA	1.3	1.0	1.5	1.5	3 - Vulnerability
170	31/11/2020	Blue Marble	Affinity Water Social Tariffs Research	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EexsaVO1suxGqiExZ0SNSncBRdUqDFZ6S_Jyw9z811JxVw?e=bexxer	2.1	2.5	2.0	1.7	3 – Billing & Tariffs 3 – Vulnerability
171	14/04/2022	DJS	2021-2022 Full Year Perceptions Survey Tables	T	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EXc6iUHOsupBshmqTyBlNusBAx_UffpkjkLlOFeYOeoWyQ?e=L0MehJ	2.0	1.0	2.0	3.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
172	27/01/2023	Affinity	C-MeX Q3 22/23 Performance Review	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbcAm2ANxuJKpamnF_SbsAEBvfgtjSkaQa3ibLI8sYOJgg?e=oG6jGp	1.3	1.0	1.0	2.0	3 – Customer Satisfaction 2 – Billing & Tariffs

Sources

Item	Date	Source	Title/Topic	Methodology	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
174	16/02/2023	Savanta	Trust and perceptions: People's views on the water sector	F	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbhmmcPLpUNHq7x3RKX21IQB6V8yEiTtyOQ5PSxmc2tgYA?e=JuJhcC	2.5	3.0	2.5	2.0	3 - Community
175	01/12/2023	Savanta/Ofwat	Cost of living: wave two Water customers' experiences	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbchwpaLUgdBoxAOj8VaOpQBDtXKfj3wTGcSebPckpMUyg?e=MzmEno	1.7	1.5	1.5	2.0	2 – Billing & Tariffs
177	10/03/2023	Affinity	Affinity Area Census 2021 Data	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EcydEq5NGoRNjlfHYN15y6MB22Pf6FCTvoTS8I0ZZcA4IA?e=ZeaVvK	2.3	1.5	3.0	2.5	3 - Community
185	13/03/2023	PJM Economics	Collaborative ODI Research: Analysis and Modelling Sub population and sensitivity analysis results	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Eb9gysgMuU9IuChhNWxTmF4BP1ZehpaUxCmDpLDQdkC_bA?e=C9RkbZ	2.7	2.5	3	2.5	3 – Billing & Tariffs
187	09/01/2023	Kantar Public	Demand reduction behavioural research: Customer survey and qualitative research findings	O/F/D/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ERS0-600coNPrymRdpaQYwIBFzRrDy0Kkr2VnSToIqVd6g?e=6gki05	2.7	3.0	2.5	2.5	3 – Demand Management 1 – Metering, Environment, Vulnerability
188	27/01/2023	Incling	Topic 50: SOS Shower Challenge	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EdbwKoja5l9HtOcZ1Jcx7-EBMBlJ9O4INyN2mzu9ErOynw?e=bVTnme	2.0	2.0	2..0	2.0	2 – Demand management 1 – Environment
189	23/02/2023	Absolute	SOS Phase 2 mid-dip	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ERceW1I6KhhCla0Rr3HpY34BQ_n4VNPtsoLuQuVgdKCTuw?e=ivotnv	2.2	2.0	2.0	2.5	3 – Demand management, Customer Satisfaction & Branding
192	04/04/2023	Incling	Topic 55: Standing charges	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EfKtpq_iUMdJn6Gdw9oWSSkBSfRz5kJpx_x_dGP388UGgw?e=Joy34t	2.0	2.0	2.0	2.0	3 – Billing & Tariffs
193	12/01/2023	Blue Marble	Evidence Review of Retail Business Water Market	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWPTpudXNaVKrqnzkNcTgioB97TqpELLCecU_uYqz5npUw?e=P4Uon9	2.0	1.5	2.0	2.5	2 –Billing & Tariffs, Customer Satisfaction & branding
194	29/03/2023	Market Operator Services ltd	R-MeX – Affinity Water (WSL)	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ERnhM9IaxVpIgX-nlONNIjoBcNchZx1-SsWwPvlAxsQ0aw?e=ZjgmYN	1.7	1.0	1.0	3.0	3 – Customer Service & Branding
198	24/04/2023	Affinity	C-MeX 22/23 Q4 & Full Year Results	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYjPddq-nv5OmhK_dnRqCYgBQ9mVBpN7QQ8vp9MRttxb9Q?e=uIECtF	1.3	1.0	1.0	2.0	3 – Customer Satisfaction & Branding 2 – Billing & Tariffs
199	17/04/2023	Eftec/ICS	Customer Priorities for Long Term Ambitions - Summary	W/D/T/Go	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYbi9p8z7I5CqTQF9AlgjV0BE4Y-9rn7mFzkxnnpVgHB1g?e=X8eAbJ	2.9	3.0	3.0	2.7	3 – Billing & Tariffs 2 - Supply, Environment 1 – Water Quality, Low Pressure, Demand Management, Asset Management, Vulnerability, Customer Satisfaction, Community
200	16/11/2022	ICS	Customer Priorities for Long Term Ambitions – Qual Report	Go/D	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EVUUn5fBZtJNgOUfBzB7vNQBtV0cXQW1KxdZ3znJSpoYuw?e=5A107H	2.5	2.5	3.0	2.0	3 – Billing & Tariffs; 2 - Supply, Environment 1 – Water Quality, Low Pressure, Demand Management, Asset Management, Vulnerability, Customer Satisfaction, Community
201	03/05/2023	DJS	Perceptions Tracker Q4 2022-23 data tables	T	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EfbPYEOzqxVCkFSPSJNIEbwB52Hu_DuF4e0hx8x1b9-zpA?e=2L3JWe	2.0	1.0	2.0	3.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
202	03/05/2023	DJS	Perceptions Tracker Full year 2022-23 tables	T	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/ER4lqozdlH1AiT1xUKRnS-4BzTkztXZ7OzXmyvWQ-PYWUA?e=3XbBGK	2.0	1.0	2.0	3.0	3 – Customer Satisfaction 1 – Water Quality. Billing & Tariffs, Demand Management, Metering, Supply
203	13/01/2023	Incling	Topic 48: Intergenerational fairness #2	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ETzm5rLzoMBDuvAFGWbtq1wBVWOrsu8M4wpb3p4mIZm0Fg?e=q1vOqd	2.0	2.0	2.0	2.0	2 – Community 1 – Billing & Tariffs, Environment, Asset management
206	03/02/2023	Incling	Topic 51: Water Stress	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EXx4u2vogGJGkI3XB-qcE3YBaK103xbuOchuR3kxYB5ilg?e=J6KUMr	2.0	2.0	2.0	2.0	3 – Customer Satisfaction & Branding 2 – Environment
207	19/05/2023	Eftec	Customer Priorities for Long Term Ambitions – Quant technical report	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWRNMtA4VGIIvIQobc1F5SkBI4fMQhVmcUgGILZ4hq9aSQ?e=oCGVgc	3.0	3.0	3.0	3.0	3 – Billing & Tariffs; 2 - Supply, Environment 1 – Water Quality, Low Pressure, Demand Management, Asset Management, Vulnerability, Customer Satisfaction & Branding, Community
208	19/05/2023	Eftec/ICS	Customer Priorities and Values Research Summary Report	W/T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EW_ZI6Lzzy1Ejf-uy7SxTQ0BFP9KME9tOY7btWsizONXlg?e=mDnW4h	2.9	3.0	3.0	2.8	3 – Low Pressure, Asset Management, Supply 1 – Vulnerability, Billing & Tariffs

Sources

Item	Date	Source	Title/Topic	Methodology	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
210	30/05/2023	Ofwat	Cost of living: wave three - Water customers' experiences	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EZobZI8J5JZKnVYawUgNJZMB_IFkusvnHRpJRU7_p_Q-9w?e=JmTZMU	1.7	1.5	1.5	2.0	2 - Billing & tariffs, Vulnerability
211	20/12/2022	Yonder	Bridging the gap: Awareness and Understanding of Water Issues	W/Go	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbX_guiSk85Mr6LoQQy6tWoBpXUWdOnAvYBRVqSlkGPWmg?e=sCaYhQ	2.0	2.0	2.0	1.9	2 – Asset management, Customer Satisfaction & Branding 1 – Demand Management, Environment
213	16/06/2023	Accent MR	Acceptability and Affordability Testing Stage One: Qualitative Research	Gf	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYUl9oinzipBrOW6geHleugB2Allula3EgiGPfCmgJhV5Q?e=mTGKFH	2.8	2.0	3.0	3.0	3 – Billing & Tariffs 1 – Asset Management, Water Quality, Supply
215	20/02/2023	Effec	Social Tariff Customer Preferences	W/F	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ESIYzQyh309LjaiwGjsWa7MBhaTGaCn6MKeuBaYlRJBBdQ?e=peYaDr	3.0	3.0	3.0	3.0	3 – Billing & Tariffs, Vulnerability
216	03/07/2023	Incling	Topic 60: Optimism 2	P	https://affinitywaterltd.sharepoint.com/:p:/s/w_CIE/EWyoUO38uklCvDjBLvCHs8gBAqkrkQqbZ3udIenwtsgPHA?e=T4fkHy	2.0	2.0	2.0	2.0	3 – Customer Satisfaction & Branding
217	26/04/2018	Artesia consulting	The long term potential for deep reductions in household water demand	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ESo8Btd5kfBJoHCj1Z-qOmABtlQvWXN14vYtULGRnLGH8g?e=JQDcN4	1.3	1.0	1.5	1.5	3 – Demand Management
218	31/03/2023	Blue Marble	CCW Citizens Forum: Customers' views on water Campaigns	P/Go	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Edql-DekQrBDt0kHqwaW0KABfBgVi5uR2Fo4XvTZ6PVPTQ?e=OJYLZP	2.0	2.0	2.0	2.0	3 – Demand Management, Customer Satisfaction & Branding
219	10/05/2023	DJS	Water Matters: household customers' views on their water & sewerage services 2022	T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbSuZwFgLvBMi8nYF2BSaR0BitvEMoklYlnL9x6lsehcvw?e=x2sGo7	1.7	1.5	1.5	2.0	3 – Customer Satisfaction & Branding
221	11/07/2023	Institute of Customer Service	UKCSI July 2023 Results Utilities Sector Resource Pack	W	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EUf68v2_jz1Jot-YDo4cVywBt-gacqPQFHRWJyKVmnAqtQ?e=LfpUcP	2.0	2.5	1.5	2.0	3 – Customer Satisfaction & Branding
223	28/07/2023	Impact	Q1 2023-24 Perceptions Survey	T	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ET9hFOEyu-hLlzbIhs_wS0UBkXVXIdyFphyousYE-PZu6A?e=NXO9CP	2.2	2.0	2.0	2.5	3 – Customer Satisfaction & Branding
225	28/07/2023	Incling	Topic 62: Leak Prioritisation	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/ERsgEzMP0ltPtxPpPHx6STkBXcuKDRAEX5p0SNgN1tE_cw?e=E85jn2	2.0	2.0	2.0	2.0	
237	16/12/2022	Incling	Topic 43~46: WRMP Deep Dive	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYla_H5m0qpJn-7Y9CnqresBUnDGBg7j3DiufgvVSDYK-w?e=6gTH18	2.0	2.0	2.0	2.0	3 – Supply, Environment 1 – Water Quality, Demand Management, Asset Management, Customer Satisfaction & Branding, Community
238	28/06/2023	Affinity	Affinity Water June 2023 YWYS session notes	Q	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EbtO9AjdC-5Gs6a2k5i5dqEB4Q289nSuWHUVPrevHGWOTQ?e=IeItIA	1.0	1.0	1.0	1.0	1 – Water Quality, Billing & Tariffs, Demand Management, Metering, Supply, Environment, Asset Management, Vulnerability, Customer Satisfaction & Branding, Community
239	18/01/2023	PJM Economics	Collaborative ODI Research Guidance Notes	T/R	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EWQSI2vZxOJAmUvboKgQiTIBf7drpJafpMGO1q7JHvnDew?e=SqaCBH	2.2	2.5	2.0	2.0	2 – Billing & tariffs 1 – Water Quality, Low Pressure, Supply, Environment, Community
240	18/01/2023	PJM Economics	2022 ODI results tables	T/R	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EYUU3TGhxvJGsESYkw6c4cIB4dyFh50d5nY0MWJhP4P6qQ?e=6ETjjJ	2.5	2.5	2.0	3.0	2 – Billing & tariffs 1 – Water Quality, Low Pressure, Supply, Environment, Community
241	09/06/2023	Savanta	Ofwat - Environmental Performance Commitments Qualitative Research	D	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EaATL4D-wM5LiaqLC43GVFYBlsUykYA-5k307ueDFEWCWw?e=IM6brC	2.0	2.0	2.0	2.0	1 - Environment
244	01/08/2023	ICS	UK Customer Satisfaction Index July 2023	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/Ebi1CNaBz8hOvir-d7a_XL8BTrcH9TX5hmcjdP0ZrSXOAg?e=VzKhge	1.8	2.0	1.0	2.5	1- Customer Satisfaction
248	01/09/2023	Affinity	WRMP Consultation Statement of Response	Q	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EYT1wPavLkZCoh0ay4rnaVcB66B2XnE4Fyva0hTeffh1uQ?e=Jr4O04	1.0	1.0	1.0	1.0	3 – Supply 2 – Environment, asset Management 1, Billing, Demand Management, Metering, Community
249	08/12/2022	Ofwat	Water Company Performance Report 2021-22	K	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EZEMEv9cHK5Jn4j6fSZ14SMBPHKIxMhomGzE3ACMbXIhJg?e=DV8TOo	2.0	2.0	2.0	2.0	1 - Water Quality, Low pressure, Demand Management, Metering, Supply, Environment, Asset management, Vulnerability, Customer Satisfaction, Community

Sources

Item	Date	Source	Title/Topic	Methodology	Links	Robustness Scoring				Key Subject Contribution level
						Overall	Design	Method	Interpretation	
250	22/03/2023	Ofwat	Leakage Dataset March 2023	K	https://affinitywaterltd.sharepoint.com/:x:/s/w_CIE/EfmTLs-eBQVDr9qQaTepdLsBQ9Uldf-D619K7jkNz5Vwtw?e=1E1xhY	2.3	2.0	2.0	3.0	3 – Asset Management
251	11/09/2023	Accent	Acceptability & Affordability Testing Quantitative Summary	W	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EdLqvhl_GpZCusPPqqmhl_ABeFeiEvc27c7ghfONpq7t3g?e=dwCEIo	2.6	2.5	2.5	2.7	3 - Billing & Tariffs 1 – Water Quality, Supply, Asset Management, Environment
252	08/09/2023	Incling	Topic 65: AAT & LTDS	P	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EeDqFMQsl9FBu6cpcKBeBZ0BXuNBMOd-x3ev_-qrcSMn2g?e=FpDCtf	2.0	2.0	2.0	2.0	3 - Billing & Tariffs 1 – Water Quality, Supply, Asset Management, Environment
253	28/06/2023	Community Research	Affinity Water Business Plan Acceptability: research with vulnerable and future customers	Gf, D	https://affinitywaterltd.sharepoint.com/:b:/s/w_CIE/EZ2MePjGAPBDpSn5TTUiHq4BFNfDMe5dy2ABYIS0TB8gxw?e=ykQZGy	2.0	2.0	2.0	2.0	3 – Billing & Tariffs, Vulnerability 1 – Water Quality, Environment, Asset Management, Customer Satisfaction, Community
Items still in draft & not yet available in the Research Library										
XXX		Affinity	PR24 Consultation results	Q						

Methodology Codes	
D	Qualitative Depth Interviews
F	CAPI/Face to Face quantitative surveys
Gf	Face to Face Focus Groups
Go	Online Focus Groups
K	Desk Research
M	Data Analytics & Modelling
O	Observation/"Ethnography"
P	Qualitative Customer Panel
Q	Town Hall/Public Consultation
R	Postal Survey
T	CATI/ quantitative telephone survey
V	Data from customer feedback surveys
W	CAWI/ Online quantitative survey
X	Quant Survey of unknown method
-	Not enough info to determine