

Annex A: Independent Water Commission's call for evidence – interim summary of responses

3 June 2025

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Overview

1. The Independent Water Commission published a Call for Evidence on the water sector regulatory system in England and Wales. The Call for Evidence was open from 27 February to 23 April 2025 and sought to collect a broad range of views on challenges facing the water system and how regulation of the water sector could be improved.
2. The Call for Evidence received over 50,000 responses, from a wide range of individuals, groups and organisations. These are being used to inform the development of the Commission's recommendations.
3. This annex provides an initial summary of responses to the Independent Water Commission's Call for Evidence. The objective of this analytical annex is to offer a transparent overview of the views submitted, to support readers in understanding the evidence base informing the Commission's interim report. The Commission will undertake further quantitative and qualitative analysis of consultation responses as we work towards the final report.

Summary of responses

4. The Call for Evidence was hosted on the online platform Citizen Space and consisted of 73 questions. Responses were also received by email, by post and through four external campaigns.
5. Four organisations, Wildfish, Organise, 38 Degrees and Surfers Against Sewage ran four campaigns (with 38 Degrees and Surfers Against Sewage running a joint campaign survey, and Surfers Against Sewage running an additional, separate "Ocean Activist" survey) encouraging the public to submit responses.
6. The Call for Evidence received a total of 50,114 responses, these included:
 - 1,605 responses via Citizen Space
 - 162 via email
 - 2 via post
 - 15,741 via the Organise campaign
 - 970 via the Wildfish campaign
 - 28,458 via the joint 38 Degrees and Surfers Against Sewage campaign
 - 3,176 via the Surfers Against Sewage "Ocean Activist" campaign.
7. This annex presents a breakdown of responses to the questions asked in the Call for Evidence. The Call for Evidence questions and responses have been grouped under the five areas covered in the interim report and therefore are

not presented in this annex in chronological order. Only responses that followed the prescribed format of the Call for Evidence questionnaire are summarised here. Responses submitted outside of this format have not been included in this summary but are being considered alongside other evidence by the Commission. The Commission's final report will build on the analysis set out in this interim report, providing further detail and insight into all evidence received including responses outside of the Citizen Space platform and process.

Methodology of analysis for analytical summary

8. Closed-text responses submitted via Citizen Space or via email which followed the Citizen Space format, have been analysed quantitatively. For open-text responses submitted via Citizen Space or via email, thematic analysis was conducted by the Secretariat for the Independent Commission. For the purposes of this analytical summary, the team used a Government Artificial Intelligence (AI)-assisted tool to support them in identifying key themes.¹ To ensure the robustness and reliability of the analysis, an evaluation was conducted comparing the outputs of the AI-assisted tool with those of human reviewers. This evaluation assessed the tool's performance in identifying themes and sentiment across a sample of responses. The findings ensured a high level of alignment between the AI-generated outputs and human analysis, providing assurance of the tool's effectiveness and supporting its use in the thematic analysis process. A high-level overview of these findings is included here, with more detailed analysis to follow in the Commission's final report.
9. In addition, responses to surveys run by two public-facing campaigns have been considered here: one by Organise and one by 38 Degrees in collaboration with Surfers Against Sewage. Where campaign survey questions align with the questions posed by the Independent Commission's Call for Evidence, responses have been integrated into the main analysis of both closed and open-text questions. These campaign responses significantly increased the volume of responses to certain questions, which is noted where relevant, in the breakdown of questions below.
10. Where the campaign survey questions differed in meaning or format from the original questionnaire, responses are being analysed separately. This analysis is not reported within this annex. A full summary of findings has

¹ The Consult AI tool used is owned by the Department for Science, Innovation and Technology (DSIT): [Consult - Projects - Incubator for Artificial Intelligence - GOV.UK](#)

been provided to the Commission by 38 Degrees and Surfers Against Sewage, which is being considered as a piece of evidence informing the Commission's final conclusions.

11. Responses from the Wildfish campaign could not be integrated into the responses to our Call for Evidence questions, as they followed a single, uniform template and were not structured in line with the Call for Evidence questionnaire. Similarly, Surfers Against Sewage's separate Ocean Activist campaign survey, was not structured in line with the Call for Evidence questionnaire. As this annex solely reports on responses to the Call for Evidence questionnaire, the Wildfish and Surfers Against Sewage "Ocean Activist" campaign responses are not reported within this annex but will be considered in more detail as part of the Commission's final report.
12. Campaign, email, and postal responses that did not follow the format of the Call for Evidence questionnaire have not been summarised in this annex. However, these responses are being considered alongside other evidence in informing the Commission's final report.
13. For closed questions that allowed respondents to select only one option, percentages may not always total 100% due to rounding. Where this occurs, it is noted in the analysis of the relevant question. Some closed questions permitted multiple responses; this is clearly indicated in the analysis where applicable. Option labels within the tables and graphs below for some of the questions have been shortened for clarity and ease of presentation.

Section 1: Overview of respondents

Questions 1 to 5 in the consultation are related to confidentiality and personal details of respondents and are not explored in this section. Questions 6 to 9 are related to the demographic breakdown of respondents.

Question 6: In what capacity are you completing this consultation?

This question received 1,650 responses through Citizen Space and email. Results are shown as a percentage of respondents to this question (%).

Response	Percentage of respondents (%)
As a member of the public with an interest	73%
Other	7%
As an NGO or other non-profit public interest group	5%
As a consultant/industry expert	4%
As a business or organisation	4%
As an academic or researcher	2%
As a public representative	1%
As a farmer or land manager	1%
As a representative of a water company	1%
As a local authority	1%
As an investor	1%
As a representative of a regulator or enforcement body	<1%

This question also received 24,340 responses from the 38 Degrees and Surfers Against Sewage campaign. The majority of respondents to the joint 38 Degrees and Surfers Against Sewage campaign (98%) identified as a member of the public with an interest. An additional 1% selected 'Other', while the remaining 1% was made up of respondents who identified with each of the remaining categories.

This question was not covered in the Organise campaign, so their responses have not been included here.

Question 7: What is the name of the organisation or interested group that you are responding on behalf of?

We received 591 responses to this question, representing a broad cross-section of stakeholders in the water sector. This included:

- All water companies and water and sewerage companies (WASCs) in England and Wales
- All relevant regulatory bodies overseeing the water sector in England and Wales

- Independent public bodies and statutory agencies with responsibilities ranging from environmental protection, market regulation, and environmental protection
- A range of environmental non-governmental organisations (eNGOs), with a focus on issues such as sewage pollution and water quality
- Engineering and infrastructure experts with specialist knowledge of water systems and services
- Consumer and industry representative organisations.

Question 8: Where do you live?

This question received 1,648 responses through Citizen Space and email.

Response	Percentage of respondents (%)
England	94%
Wales	4%
Scotland	1%
Outside the UK, within the EU	<1%
Outside the UK, outside of the EU	<1%
Northern Ireland	0%

The majority of responses came from England (94%), followed by 4% from Wales, and 1% from Scotland. 0% of responses were received from Northern Ireland.

This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Question 9: Where does your business or organisation operate?

This was an open-text question and received 335 responses through Citizen Space and email. Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers. Results are shown as a percentage of respondents to this question (%).

Response	Percentage of respondents (%)
England	91%
Wales	35%
Scotland	25%
Northern Ireland	20%
Outside the UK, within the EU	20%
Outside the UK, outside of the EU	11%

Not applicable	7%
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The majority of respondents (91%) identified as a business or organisation operating in England, 35% in Wales, 25% in Scotland, and 20% in Northern Ireland.

This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here.

Section 2: Summary of responses

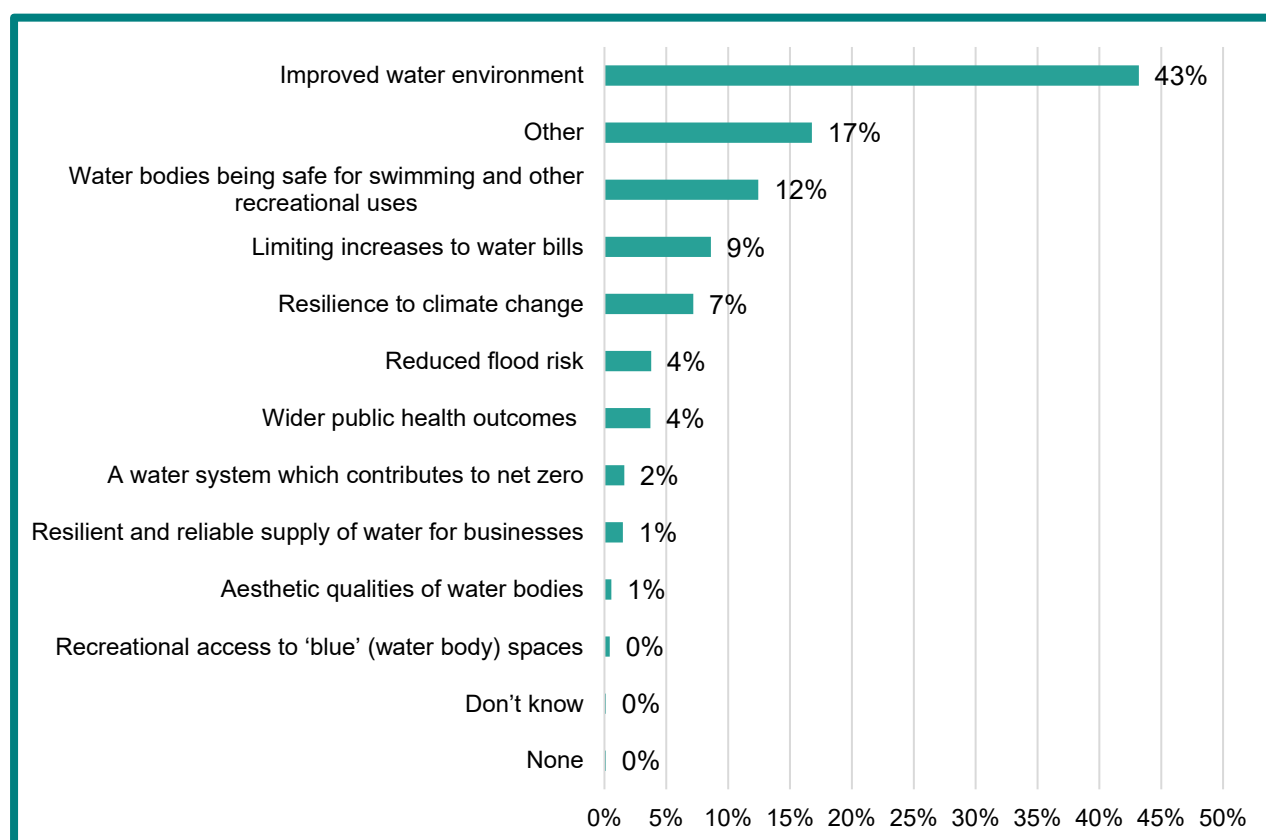
Strategic direction & planning

Q10a. Thinking ahead to what you would like the water system to look like in the future (e.g. in 25 years' time), what outcomes from the water system are most important to you? (Please select your first priority here)

For the interim report, we are focusing on the analysis of responses to this question and not questions Q10b and Q10c. This analysis will only cover responses related to the first priority outcome and its corresponding follow-up (Q11a). This approach allows us to provide an early insight into the most critical priorities identified by respondents and their perceptions of current delivery.

Analysis of the second and third priority outcomes, along with their respective Q11b and Q11c follow-up responses, will be included in the final report.

This question received 1,616 responses. The Organise and joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space and email responses and are therefore not included in this annex. This will be evaluated as part of the final report. Results are shown as a percentage of respondents to this question (%).



Respondents stated an ‘improved water environment’ as their most important outcome of the water system (43%).

Respondents were asked to expand if they selected “other” and 361 responses were received.

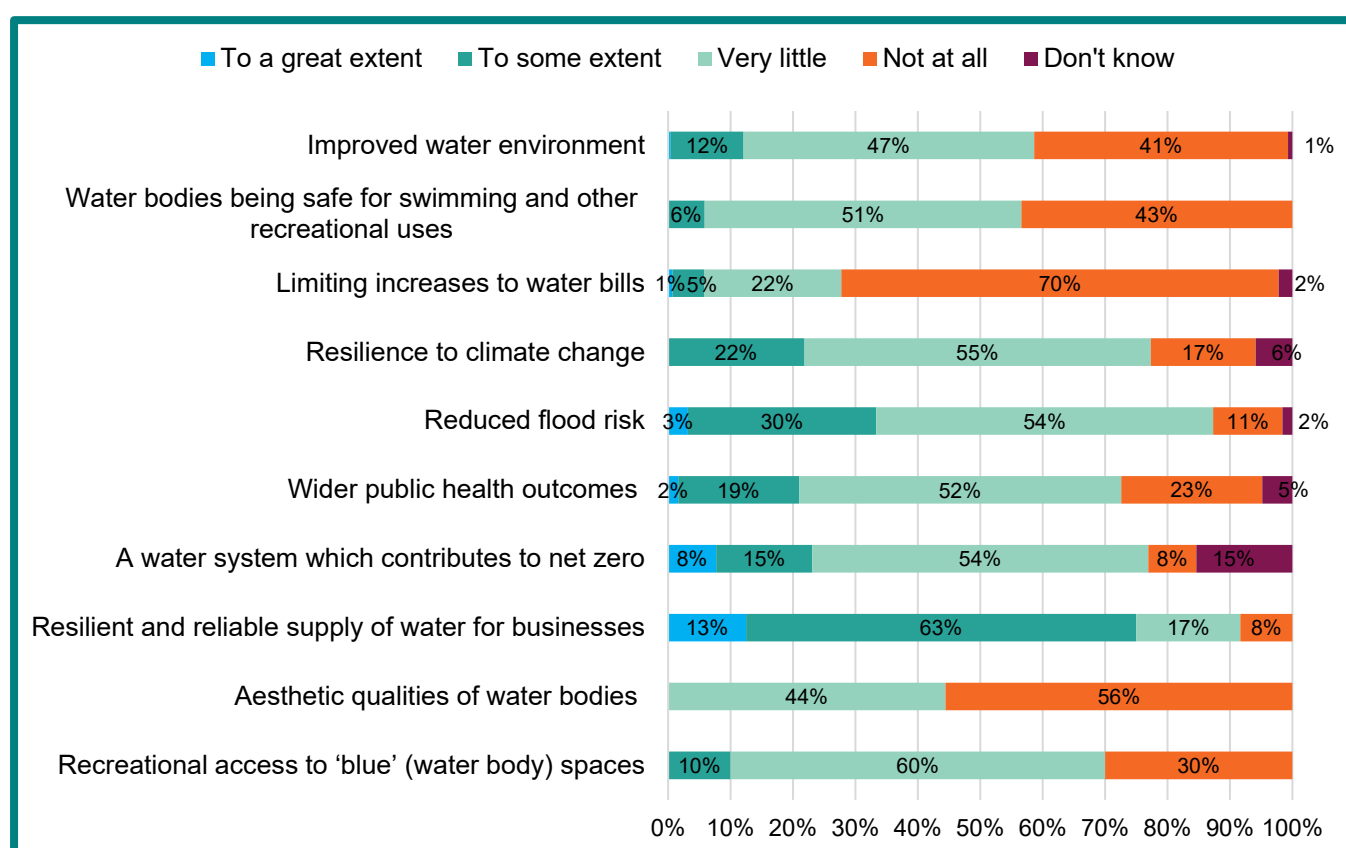
The top three themes raised in responses were:

- Nationalisation – mentioned in 19% of responses
- Safe and clean water – mentioned in 16% of responses
- Climate resilience – mentioned in 11% of responses

Q11a. To what extent do you believe the overall water framework already delivers the outcome you chose as your highest priority?

This question received 1,366 responses.

The Organise and joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space and email responses and are therefore not included in this annex. This will be evaluated as part of the final report. Respondents were asked to what extent they believe the overall water framework currently delivers the outcome they had identified as their highest priority in Q10a. Results are shown as percentage of respondents to this question (%).



To Note: Figures do not add up to 100% due to rounding.

The responses highlight a notable gap between what people value most and what they feel is being delivered.

For example, 12% of those who prioritised 'Improved water environment' believed this is delivered to some extent, while a combined 88% said it is delivered very little or not at all. 'Limiting increases to water bills' was perceived as significantly underdelivered, with 70% saying it is not delivered at all.

In contrast, 76% of respondents who selected 'Resilient and reliable supply of water for businesses' as their top priority felt this outcome is delivered either to a great extent (13%) or to some extent (63%), indicating higher confidence in this area. Those who prioritised 'Resilience to climate change' were more split: 22% felt it is delivered to some extent, while 55% said it is delivered very little, and 17% said not at all, reflecting a mixed perception of progress on long-term environmental challenges.

Overall, these findings suggest that while some operational outcomes are seen as partially met, public priorities related to the environment, affordability, and recreational access are widely perceived as falling short under the current framework.

Q12. Who do you believe should be responsible for making decisions about what outcomes to prioritise from the water system?

This was an open-text question and received 14,756 responses in total. 1,488 responses were received through Citizen Space and email, 13,268 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).

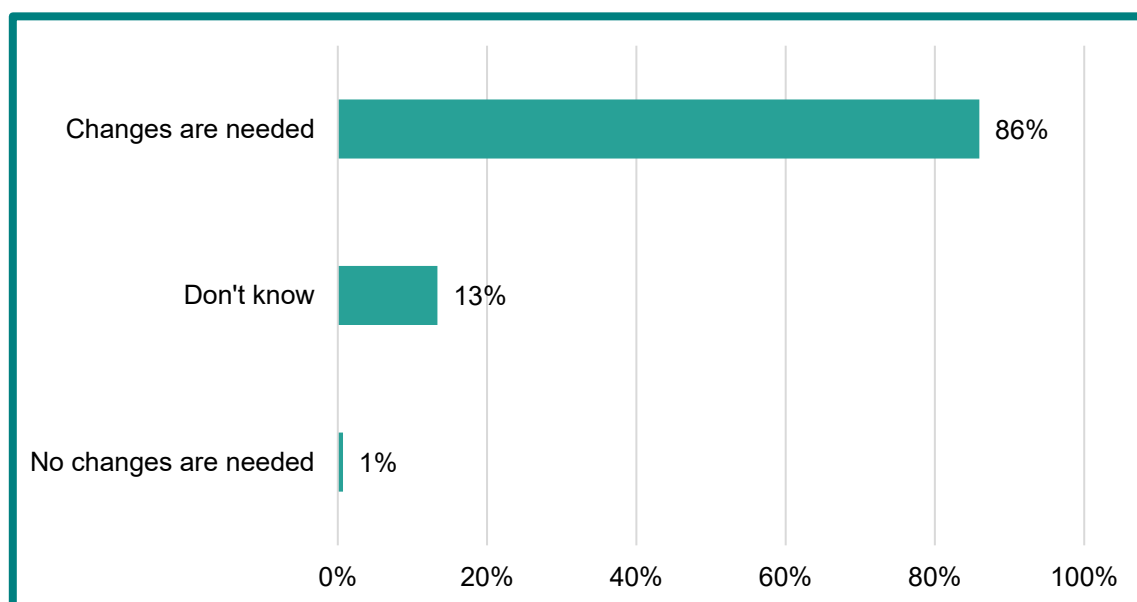
The top three themes raised in responses were:

- UK and Welsh government responsibility – mentioned in 46% of responses
- Independent regulators – mentioned in 31% of responses
- Local decision-making authority – mentioned in 23% of responses

Q13. Do you believe there should be changes to roles and responsibilities for water management across local, regional and national levels?

This question received 24,932 responses in total. 1,570 responses were received through Citizen Space and email and 23,362 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in

the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).



The majority of respondents (86%) believed that changes are needed to the roles and responsibilities of water management across local, regional and national levels. Just 1% felt that no changes are needed and 13% were unsure.

We asked respondents to expand if they selected “changes are needed” and received 9,922 responses total. 1,359 responses were received through Citizen Space and email, and 8,563 responses through the joint 38 Degrees and Surfers Against Sewage campaign.

The top three themes raised in responses were:

- Nationalisation – mentioned in 21% of responses
- Local and regional roles – mentioned in 19% of responses
- Government responsibility and oversight – mentioned in 12% of responses

Q14. Do you believe changes are needed to help reduce the siloed approach to water management across different sectors? If so, what changes do you believe would be beneficial?

This question received 1,574 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select up to 5 options. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.

Response	Percentage of respondents (%)
Changes to how regulators regulate sectors involved in the water system	57%
Government providing clearer national strategic direction and targets on water	54%
Streamlining or aligning water management planning and other plans such as flood risk plans, local nature recovery strategies, and local plans for development	47%
Increasing the status of water plans to influence other sectors	39%
A regional or catchment scale systems planning authority	35%
A national scale systems planning authority	29%
Aligning water management with democratic structures	27%
Streamlining or aligning existing water plans and planning processes across the water system	24%
Pooling together existing funding streams at a spatial level	23%
Other	12%
Don't know	5%
No changes are needed	<1%

We asked respondents to expand if they selected “other” and received 264 responses.

The top three themes raised in responses were:

- Nationalisation – mentioned in 23% of responses
- Catchment-based management – mentioned in 13% of responses
- Regulatory overhaul and enforcement – mentioned in 11% of responses

Q15. Do you believe there are barriers to money being spent more effectively and efficiently across different sectors to deliver the best outcomes for the water system? If so, what do you believe are the key barriers?

This question received 1,538 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select up to three choices. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.

Response	Percentage of respondents (%)
Limitations of alignment of existing funding pots	35%
Limitations of understanding of the full set of pressures	31%
Other	30%
Unclear targets and objectives	28%
The monitoring and classification system	27%
Limitations of evidence on costs and benefits	26%
The scale at which actions are developed	21%
Barriers to partnership schemes	16%
Planning timelines	15%
Don't know	10%
There are no key barriers	2%

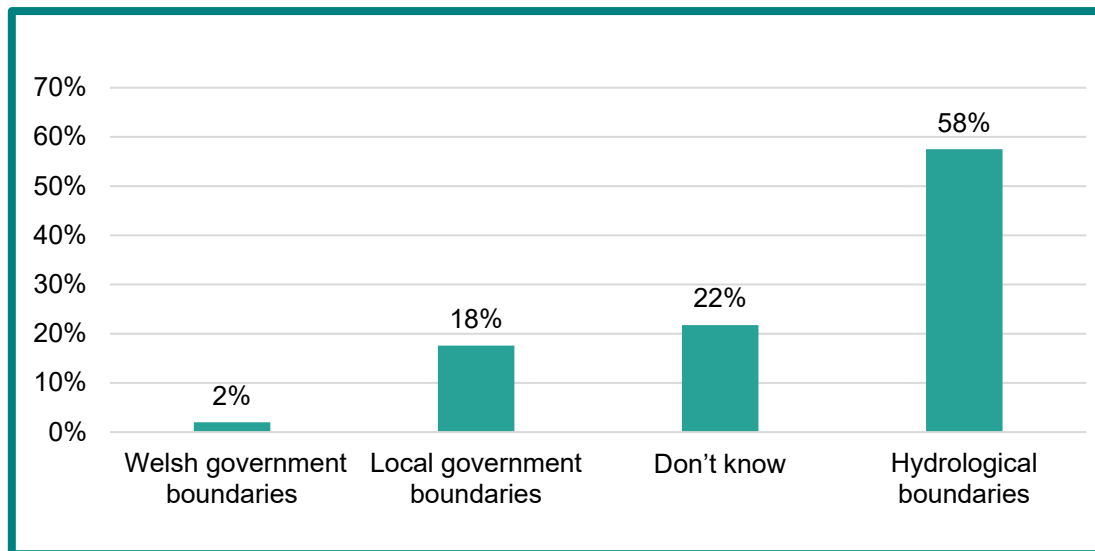
We asked respondents to expand if they selected “other” and received 525 responses.

The top three themes raised in responses were:

- Privatisation and profit motives – mentioned in 57% of responses
- Political and regulatory barriers – mentioned in 14% of responses
- Nationalisation – mentioned in 8% of responses

Q16. In your opinion, is it more important that regional water system governance aligns with hydrological or local government boundaries?

This question received 1,485 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



To Note: The 'Welsh government boundaries' option was only available to respondents who live in Wales or have a business of organisation that operate in Wales.

58% of respondents felt that it is more important for regional water system governance to align with hydrological boundaries, while 18% preferred alignment with local government boundaries. 2% selected Welsh government boundaries, and 22% were unsure.

Q20. What role do you believe the government can play in providing strategic direction for the water industry?

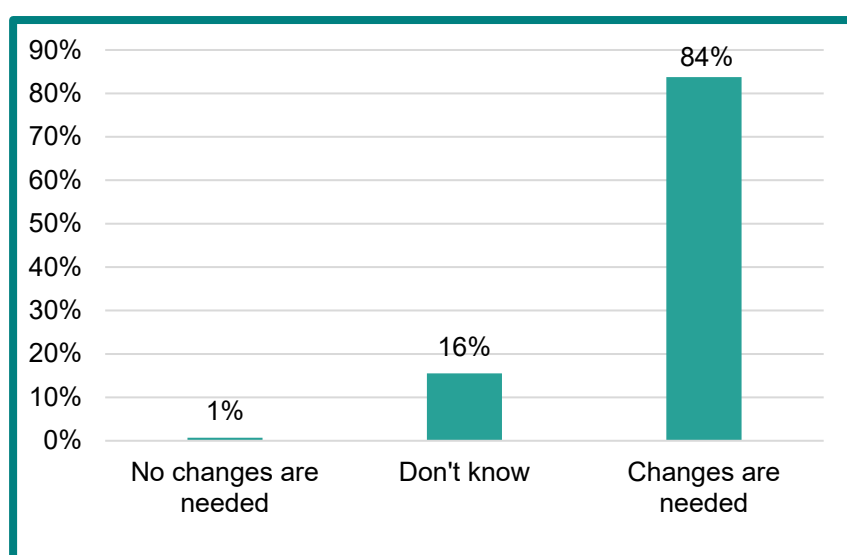
This was an open-text question and received 1,112 responses. The joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report. This question was not covered in the Organise survey, so their responses have not been included here. The top three themes raised in responses were:

- Nationalisation – mentioned in 28% of responses
- Effective independent regulators, monitoring and enforcement – mentioned in 20% of responses
- Providing stronger long-term strategic direction – mentioned in 17% of responses

Q21: What changes, if any, should be made to how the government provides strategic direction for the water industry?

This question received 1,397 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no

campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



To Note: Figures do not add up to 100% due to rounding.

84% of respondents felt changes are needed to how the government provides strategic direction for the water industry. Just 1% felt no changes are needed and 16% were unsure.

We asked respondents to expand if they selected “**changes are needed**” and received 1,057 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 23% of responses
- Effective regulation and enforcement – mentioned in 21% of responses
- Government oversight and strategic direction – mentioned in 19% of responses

Q22. Do you believe there are barriers to effective long-term water industry planning? If so, what factors do you believe are preventing effective long-term water industry planning?

This question received 1,446 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.

Response	Percentage of respondents (%)
Regulators are not adequately supporting effective planning	55%
Regulatory requirements don't support sufficient long-term certainty or respond well to emerging issues/policy changes	46%
Engagement with customers and environmental or local groups	40%
Limited timebound, specific and measurable targets	38%
Unclear what duties and functions other stakeholders	34%
Limited clear guidance from UK and Welsh Governments on priorities and how to manage trade-offs	31%
Plans don't interact well together	30%
Issues with data and assumptions	26%
Other	22%
Don't know	9%
There are no key barriers to effective long-term planning	3%

We asked respondents to expand if they selected “**other**” and received 440 responses. The top three themes raised in responses were:

- Profit-driven motives hinder investment – mentioned in 37% of responses
- Regulatory failures impede compliance – mentioned in 13% of responses
- Need for integrated planning – mentioned in 12% of responses

Q23: What changes, if any, would help water companies to use planning frameworks more effectively to fulfil their duties and deliver their functions?

This was an open-text question and received 835 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Nationalisation – mentioned in 22% of responses
- Enforcement and penalties – mentioned in 10% of responses
- Infrastructure investment and financial management – mentioned in 9% of responses

Legislative framework

Q52. Do you believe that legal and/or regulatory requirements would benefit from review or consolidation?

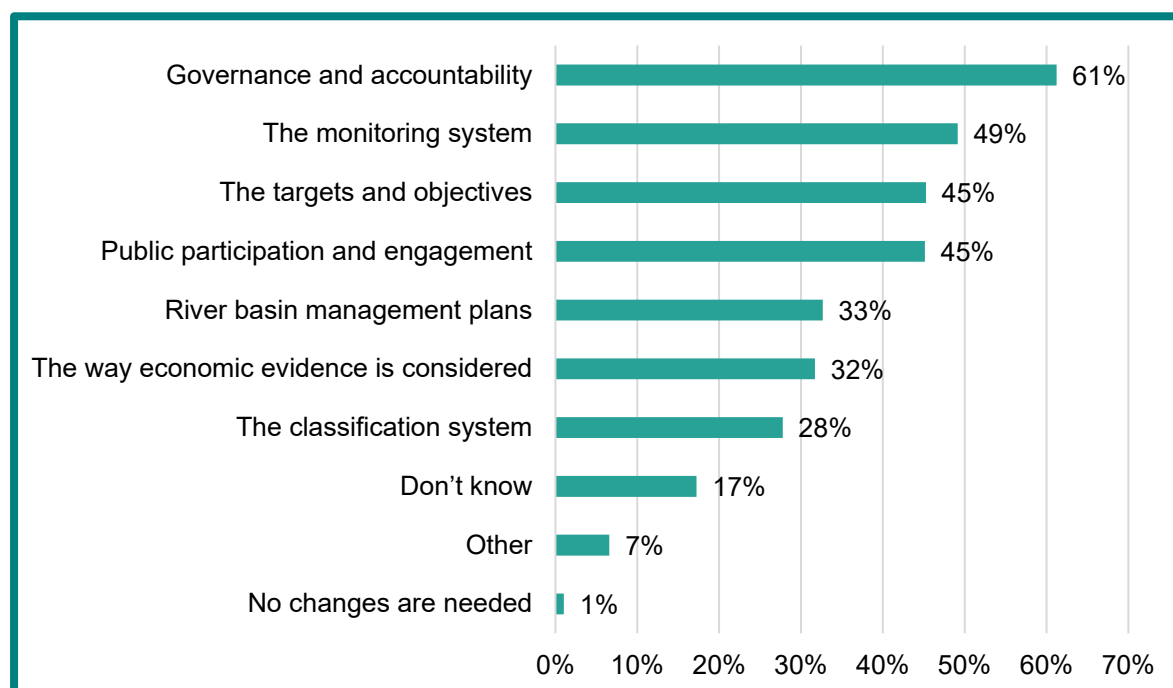
This was an open-text question and received 833 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 23% of responses
- Penalties and strengthening enforcement – mentioned in 16% of responses
- Review and consolidate legal and regulatory framework – mentioned in 12% of responses

Q17. Do you believe changes are needed to the WFD Regulations, including for 2027 onwards? If so, which areas would benefit the most from change?

This question received 1,473 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three areas of the WFD Regulations respondents believed would benefit most from change were:

1. Governance and accountability – selected by 61% of respondents
2. The monitoring system – selected by 49% of respondents
3. The targets and objectives – selected by 45% of respondents

Q18. If you feel the WFD Regulations would benefit from change, please expand on where you feel changes are necessary and the reasons why.

This was an open-text question and received 700 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Improved monitoring and data transparency– mentioned in 22% of responses
- Stricter regulations and financial penalties – mentioned in 19% of responses
- Clear targets and timelines– mentioned in 16% of responses

Q19. Do you believe changes are needed to improve how we monitor and report on the health of the water environment? If so, what changes do you believe could lead to improvements?

This question received 1,517 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.

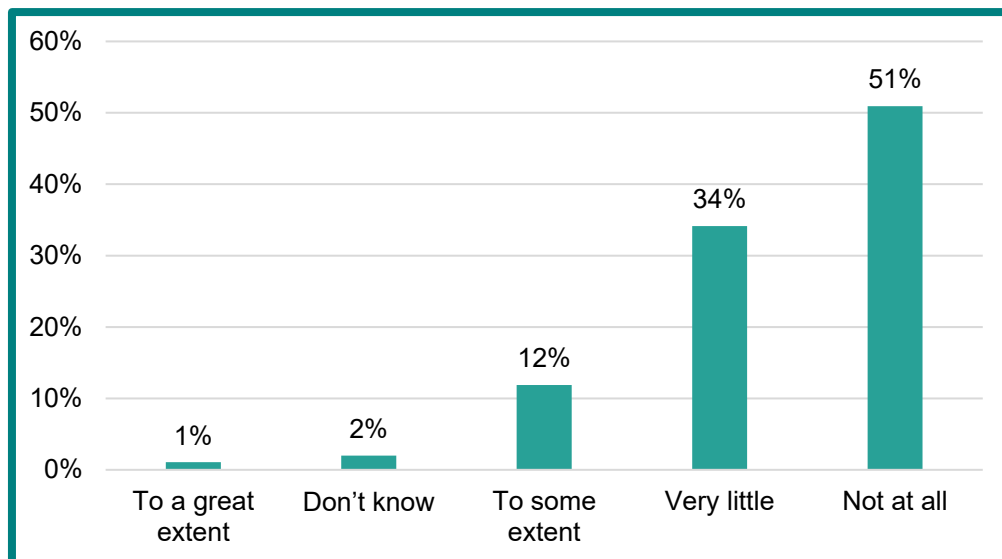
Response	Percentage of respondents (%)
Full or partial integration with wider environmental/water monitoring	60%
Reporting on wider outcomes than ecological status	58%
Data sharing platforms for government and third-party evidence/data	56%
Expanding out from the water body level to report on a whole catchment	48%
Use of citizen science	47%
Using statistical modelling for state of environment reports	16%
Other	12%
Don't know	9%
No changes are needed	1%

We asked respondents to expand if they selected “other” and received 288 responses. The top three themes raised in responses were:

- Comprehensive monitoring regime – mentioned in 20% of responses
- Improved communication with communities– mentioned in 17% of responses
- Utilisation of citizen science – mentioned in 16% of responses

Q53. Do you believe that the system of environmental regulation, monitoring and enforcement is ensuring water company compliance with environmental standards?

This question received 1,506 responses. The joint 38 Degrees and Surfers Against Sewage and Organise campaign surveys included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report. Results are shown as a percentage of respondents to this question (%).

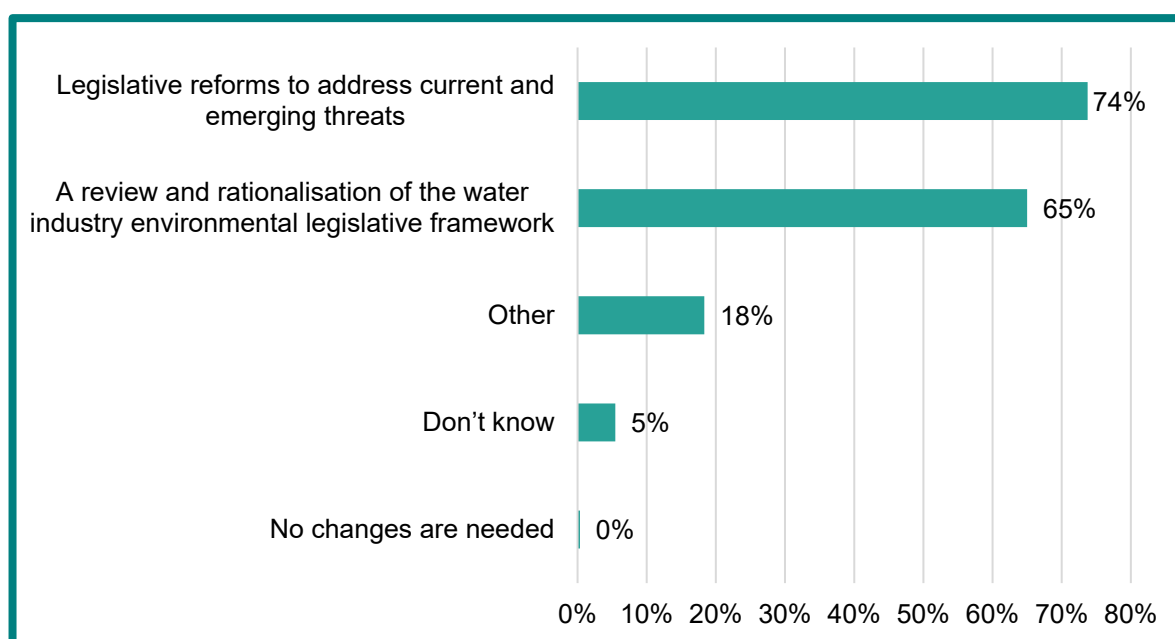


The majority of respondents (85%) believed the system of environmental regulation, monitoring and enforcement ensures water company compliance very little or not at all. 12% felt it does so to some extent, only 1% believed it does so to a great extent, and 2% were unsure.

Q54. Which of the following changes to water industry environmental regulatory requirements, if any, would improve outcomes from the sector?

This question received 1,463 responses. The joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to water industry environmental regulatory requirements that respondents believed would improve outcomes from the sector were:

1. Legislative reforms to address current and emerging threats – selected by 74% of respondents
2. A review and rationalisation of the water industry environmental legislative framework – selected by 65% of respondents
3. Other (expanded on below) – selected by 18% of respondents

We asked respondents to expand if they selected “**other**” and received 359 responses. The top three themes raised in responses were:

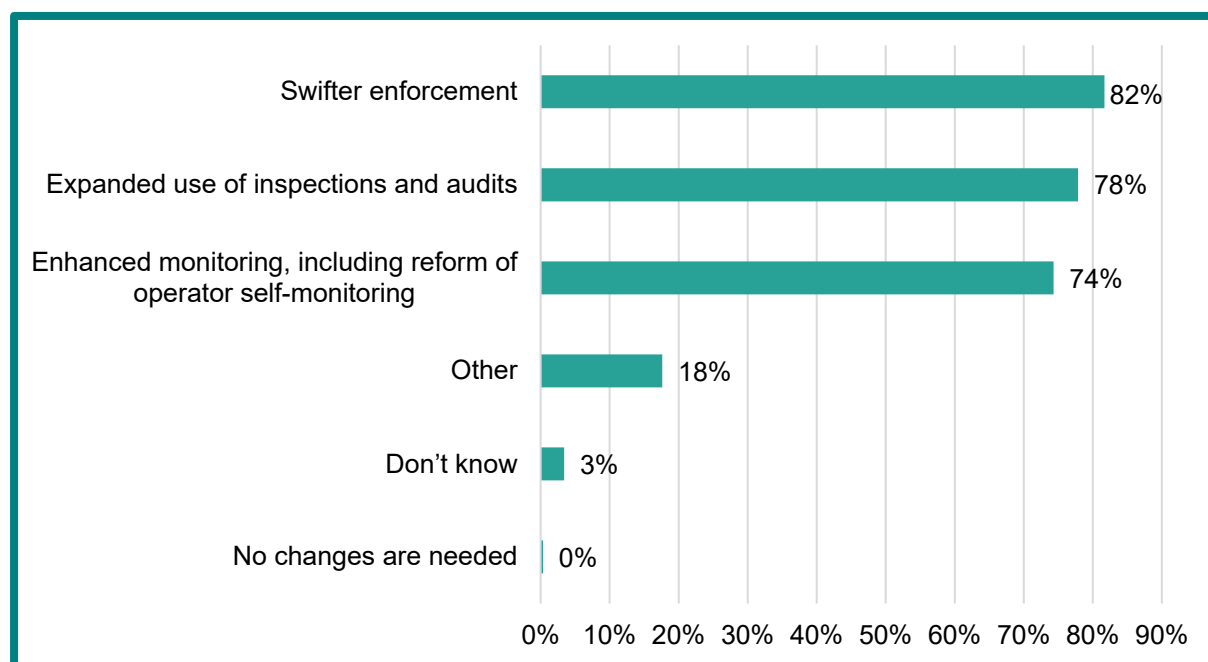
- Effective enforcement mechanisms – mentioned in 18% of responses
- Nationalisation – mentioned in 17% of responses
- Strengthen environment agency – mentioned in 13% of responses

Q55. Which of the following changes to the water industry environmental regulation, monitoring and enforcement framework, if any, would improve outcomes for the sector?

This question received 1,464 responses. The Organise campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report.

This question was not covered in the joint 38 Degrees and Surfers Against Sewage campaign survey, so their responses have not been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to the water industry environmental regulation, monitoring, and enforcement framework that respondents believed would improve outcomes for the sector were:

1. Swifter enforcement – selected by 82% of respondents
2. Expanded use of inspections and audits – selected by 78% of respondents
3. Enhanced monitoring, including reform of operator self-monitoring – selected by 74% of respondents

We asked respondents to expand if they selected “other” and received 366 responses. The top three themes raised in responses were:

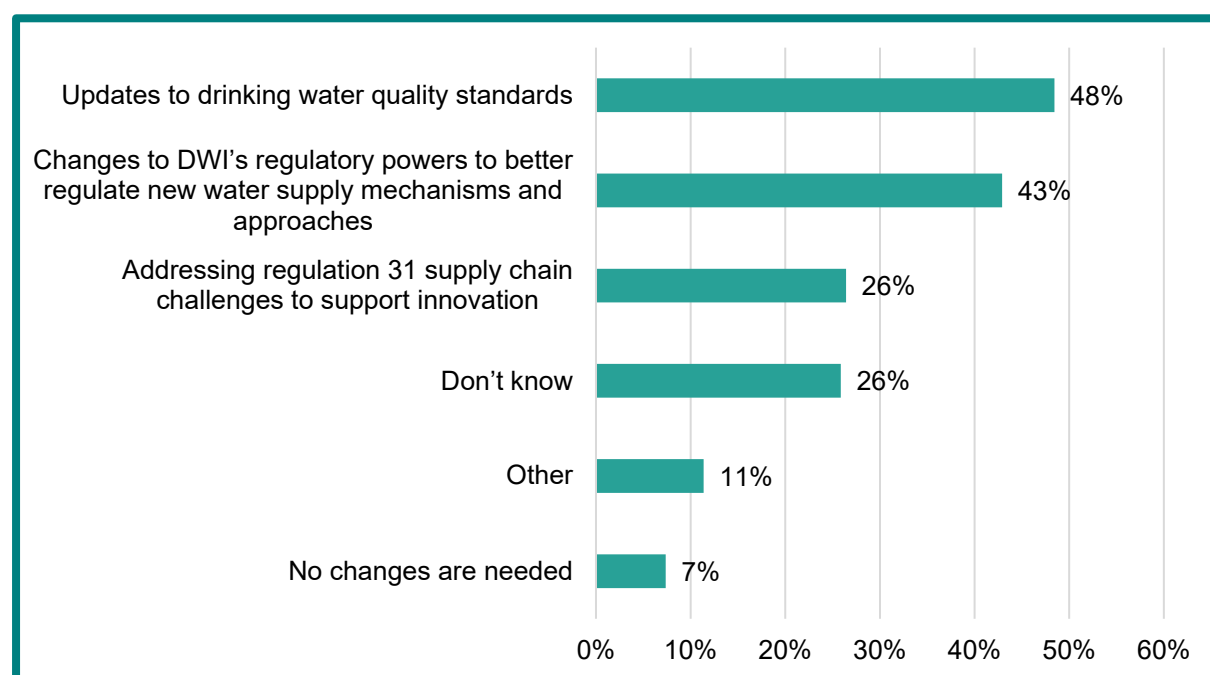
- Stronger enforcement measures – mentioned in 32% of responses
- Independent monitoring systems – mentioned in 26% of responses
- Executive accountability for violations – mentioned in 19% of responses

Q56. What changes, if any, could be made to the drinking water regulatory system to maintain world leading drinking water quality?

This question received 1,249 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no

campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to the drinking water regulatory system that respondents believed would maintain world leading drinking water quality were:

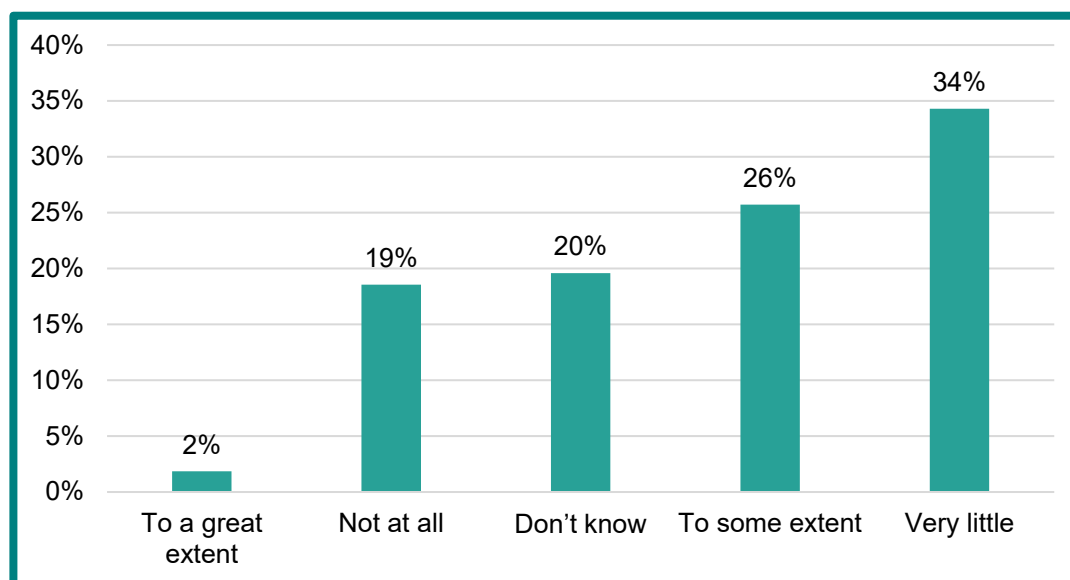
1. Updates to drinking water quality standards – selected by 48% of respondents
2. Changes to DWI's regulatory powers to better regulate new water supply mechanisms and approaches – selected by 43% of respondents
3. Addressing regulation 31 supply chain challenges to support innovation – selected by 26% of respondents

We asked respondents to expand if they selected “**other**” and received 200 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 21% of responses
- Chemical contaminants and health risks – mentioned in 17% of responses
- Regulation 31 clarity and concerns – mentioned in 10% of responses

Q57. To what extent is the overall water regulatory framework securing resilient long-term supplies of water?

This question received 1,353 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



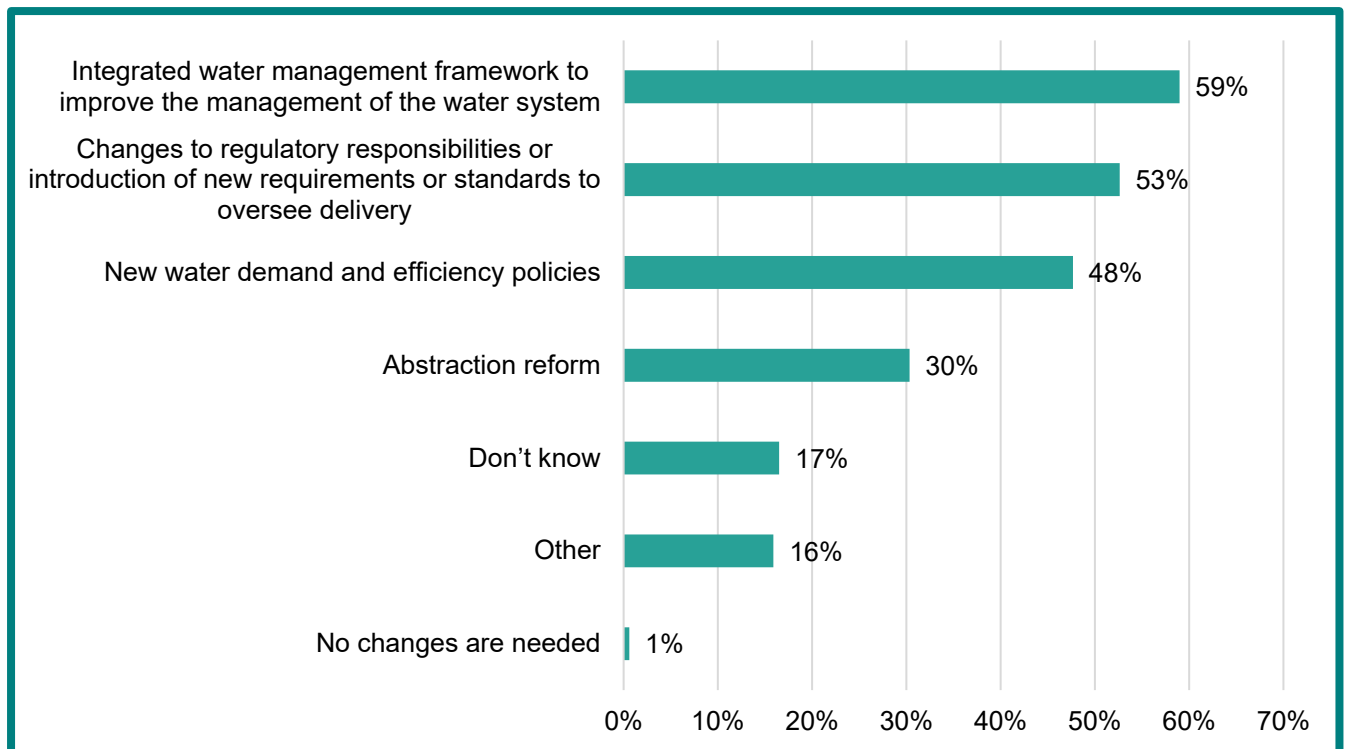
To Note: Figures do not add up to 100% due to rounding.

Responses to the question were broadly split, with no clear consensus. While 34% of respondents felt the framework is securing resilient long-term water supplies very little and 19% said not at all, a further 20% were unsure. Some respondents were more optimistic: 26% believed the framework is securing resilient long-term water supplies to some extent, and 2% felt it is to a great extent.

Q58: What changes, if any, could be made to the overall water regulatory framework to ensure it can secure a resilient long-term supply of water?

This question received 1,309 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to the overall water regulatory framework that respondents believed would ensure it can secure a resilient long-term supply of water were:

1. Integrated water management framework to improve the management of the water system – selected by 59% of respondents
2. Changes to regulatory responsibilities or introduction of new requirements or standards to oversee delivery – selected by 53% of respondents
3. New water demand and efficiency policies – selected by 48% of respondents

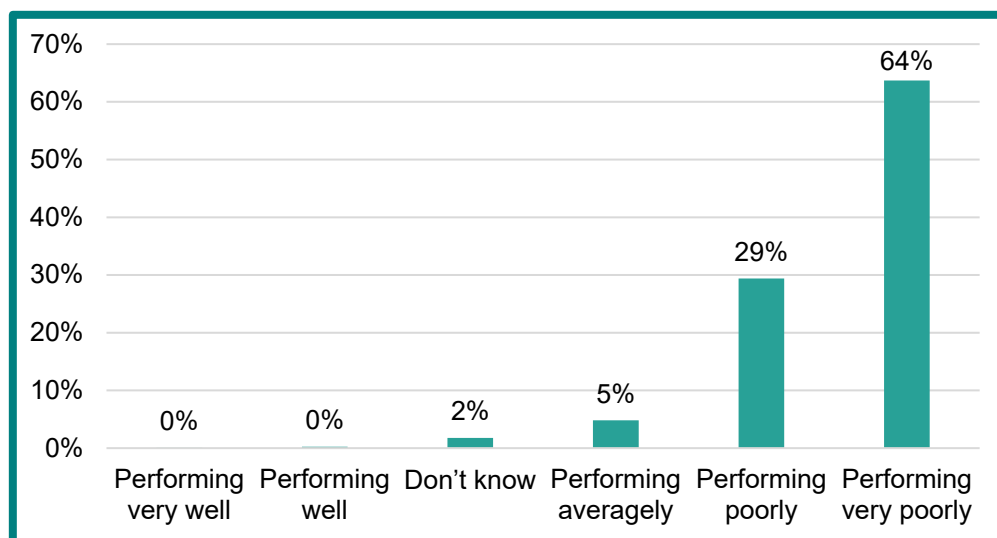
We asked respondents to expand if they selected “**other**” and received 324 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 20% of responses
- Infrastructure investment – mentioned in 16% of responses
- Integrated and holistic water management – mentioned in 14% of responses

Regulatory reform

Q24: How would you rate the performance of the water regulatory framework?

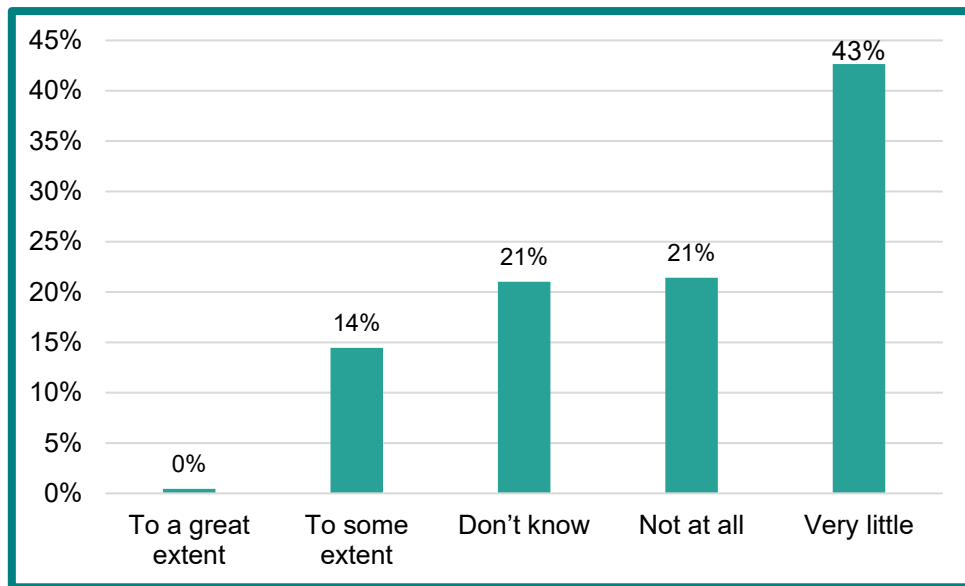
This question received 26,179 responses in total. 1,563 responses were received through Citizen Space or email and 24,616 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).



A large majority of respondents (93%) rated the performance of the regulatory framework as poor or very poor. 5% considered it average, only <1% felt it was performing well or very well, and 2% were unsure.

Q25: To what extent do water regulators coordinate effectively in the regulation of the water industry?

This question received 1,550 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of total respondents to this question (%).



To Note: Figures do not add up to 100% due to rounding.

The majority of respondents expressed the view that water regulators do not coordinate effectively in the regulation of the water industry. 64% replied that they coordinate very little or not at all, while only 14% believe there is effective coordination to some extent. <1% of respondents feel regulators coordinate effectively to a great extent, and 21% were unsure.

Q26: What changes, if any, do you consider are needed to the framework of water regulators to improve the regulation of the water industry? Please consider both potential benefits and costs of any proposed changes.

This was an open-text question and received 16,945 responses in total. 1,111 responses were received through Citizen Space and email and 15,834 responses were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%). The top three themes raised in responses were:

- Stronger enforcement powers – mentioned in 40% of responses
- Executive accountability – mentioned in 19% of responses
- Nationalisation – mentioned in 18% of responses

Q27: To what extent do you think the water industry regulators have the capacity, capabilities and skills required to effectively perform their roles?

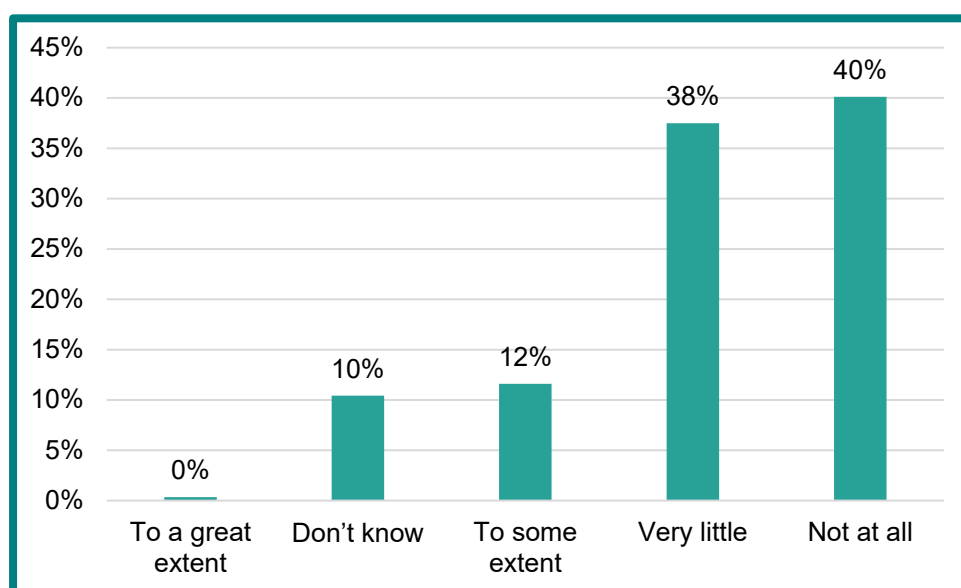
This was an open-text question and received 1,007 responses. The joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included

in this annex. This will be evaluated as part of the final report. This question was not covered in the Organise survey, so their responses have not been included here. The top three themes raised by respondents regarding issues with water industry regulators were:

- Funding and resource issues – mentioned in 37% of responses
- Ineffective regulators and leadership – mentioned in 36% of responses
- Legislation, powers and duties– mentioned in 15% of responses

Q28. To what extent do you think the economic regulatory framework is delivering positive outcomes?

This question received 1,448 responses. The joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of respondents to this question (%).



The majority of respondents (78%) thought the economic regulatory framework is delivering positive outcomes very little or not at all. 12% felt it is delivering positive outcomes to some extent, <1% selected 'to a great extent', and 10% were unsure.

Q29. How do you think the Price Review process should balance the need to keep customer bills low with the need for infrastructure resilience?

This was an open-text question and received 1,007 responses. The joint 38 Degrees and Surfers Against Sewage campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this

annex. This will be evaluated as part of the final report. This question was not covered in the Organise campaign survey, so their responses have not been included here. The top three themes raised in responses were:

- Profit regulation to reinvest into infrastructure – mentioned in 25% of responses
- Nationalisation – mentioned in 16% of responses
- Regulatory failure – mentioned in 14% of responses

Q30. What, if any, changes could be made to the Price Review process to better enable the water industry to deliver positive outcomes?

This was an open-text question and received 737 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Profit regulation to reinvest into infrastructure – mentioned in 18% of responses
- Nationalisation – mentioned in 16% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 15% of responses

Q31. What, if any, changes could be made to the Price Review process on assessing and setting base expenditure to effectively support infrastructure maintenance?

This was an open-text question and received 556 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 19% of responses
- Nationalisation – mentioned in 14% of responses
- Profit regulation to reinvest into infrastructure – mentioned in 13% of responses

Q32. What, if any, changes could be made to the Price Review process on assessing and setting enhancement expenditure to effectively support infrastructure improvements?

This was an open-text question and received 496 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign

surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 30% of responses
- Nationalisation – mentioned in 14% of responses
- Profit regulation to reinvest into infrastructure – mentioned in 13% of responses

Q33. What, if any, changes could be made to the Price Review Process on assessing and setting the Weighted Average Cost of Capital (WACC) to effectively attract investment in the water industry?

This was an open-text question and received 433 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 28% of responses
- Nationalisation – mentioned in 21% of responses
- Profit regulation to reinvest into infrastructure – mentioned in 12% of responses

Q34. What, if any, changes could be made to the Price Review process on assessing and setting performance incentives to effectively secure infrastructure delivery?

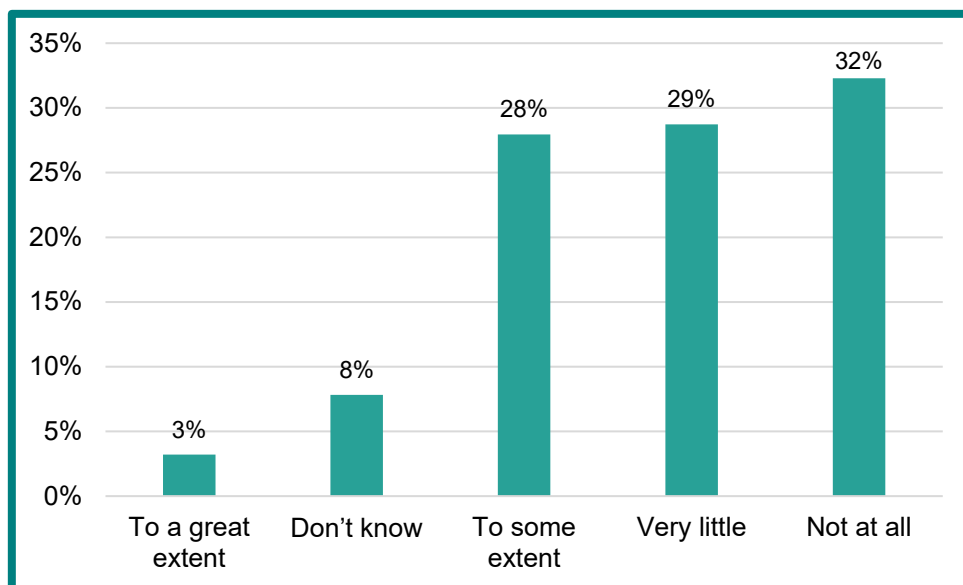
This was an open-text question and received 467 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Regulatory reform – mentioned in 24% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 17% of responses
- Nationalisation – mentioned in 16% of responses

Q35. To what extent does the economic regulatory framework deliver acceptable water bills for customers?

This question received 1,431 responses. The joint 38 Degrees and Surfers Against Sewage survey and Organise campaign survey included a version of this question, but differences in phrasing and/or format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this

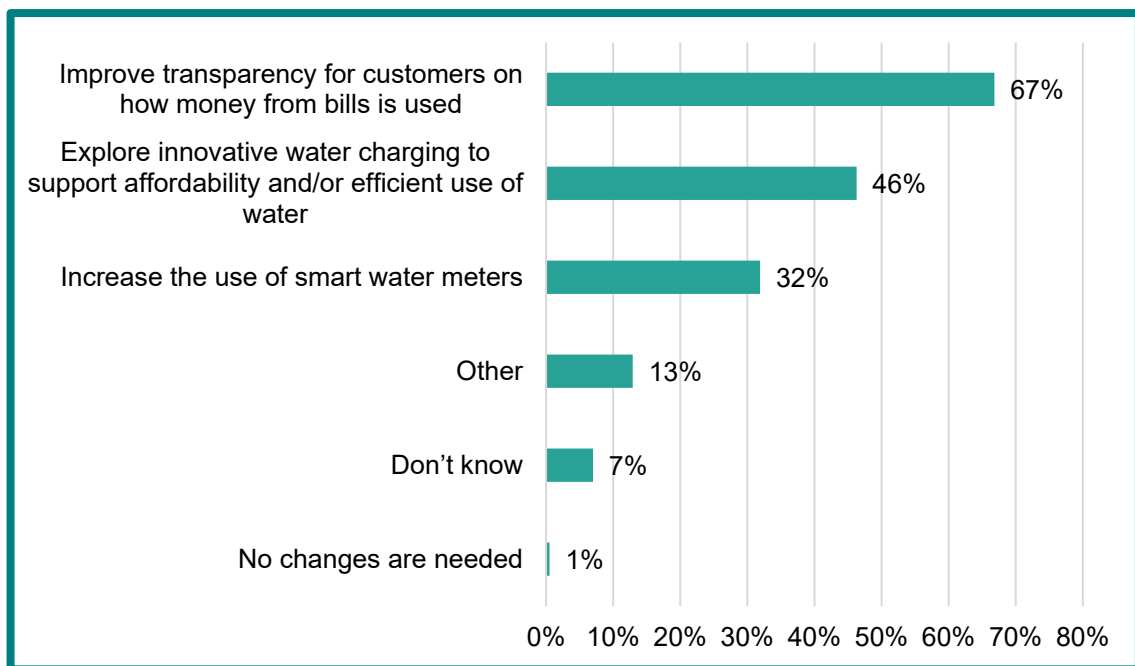
annex. This will be evaluated as part of the final report. Results are shown as a percentage of respondents to this question (%).



61% of respondents felt that the economic regulatory framework delivers acceptable water bills to customers either very little or not at all. 28% felt it did so to some extent, whereas only 3% felt it delivered acceptable bills to a great extent. 8% were unsure.

Q36. What, if any, changes would help ensure customers are paying fairly for the water they use?

This question received 25,897 responses in total. 1,415 responses were received through Citizen Space or email and 24,482 responses were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of respondents to this question (%). Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes respondents believed would help ensure customers are paying fairly for the water they use were:

1. Improve transparency for customers on how money from bills is used – selected by 67% of respondents
2. Explore innovative water charging to support affordability and/or efficient use of water – selected by 46% of respondents
3. Increase the use of smart water meters – selected by 32% of respondents

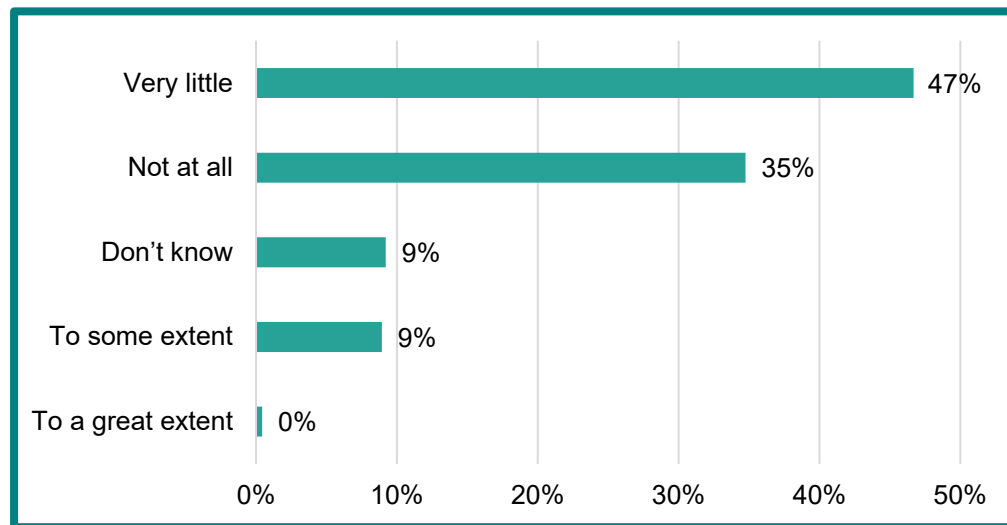
We asked respondents to expand if they selected “**other**” and received 564 responses. A version of this part of the question was asked in the joint 38 Degrees and Surfers Against Sewage campaign, but differences in phrasing/format meant the responses could not be analysed alongside Citizen Space/email responses and are therefore not included in this annex. This will be evaluated as part of the final report. The top three themes raised in responses were:

- Nationalisation – mentioned in 24% of responses
- Infrastructure investment and readiness – mentioned in 17% of responses
- Universal metering with smart meters – mentioned in 14% of responses

Q37. To what extent does the regulatory framework protect customers from poor service?

This question received 26,787 responses in total. 1,411 responses were received through Citizen Space or email and 25,376 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in

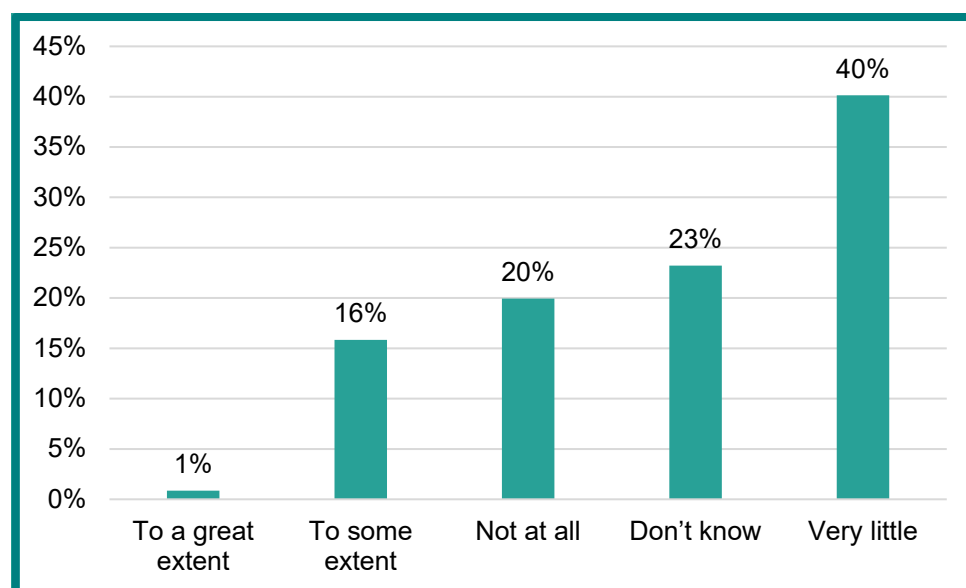
the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).



The majority of respondents (82%) expressed that the regulatory framework protects customers from poor service either very little or not at all. 9% felt that it does so to some extent, and <1% believed it does so to a great extent. 9% were unsure.

Q38. To what extent does the regulatory framework ensure that vulnerable customers are effectively supported?

This question received 25,881 responses in total. 1,380 responses were received through Citizen Space or email and 24,501 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).

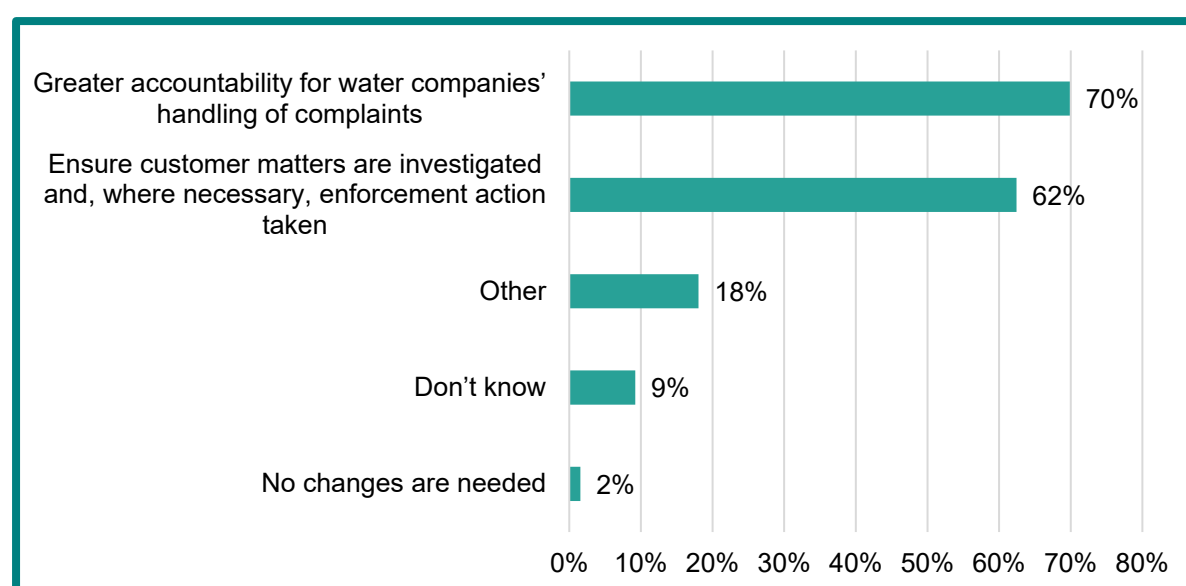


23% of respondents were unsure about the extent to which vulnerable customers are effectively supported by the regulatory framework. 40% reported that vulnerable customers are supported very little, while 20% believed they are not supported at all. 16% thought they are supported to some extent and only 1% felt they are to a great extent.

Q39. What, if any, changes to the regulatory framework would better incentivise water companies to deliver and maintain high customer standards?

This question received 1,347 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes respondents believed would better incentivise water companies to deliver and maintain high customer standards were:

1. Greater accountability for water companies' handling of complaints – selected by 70% of respondents
2. Ensure customer matters are investigated and, where necessary, enforcement action taken – selected by 62% of respondents
3. Other (expanded on below) – selected by 18% of respondents

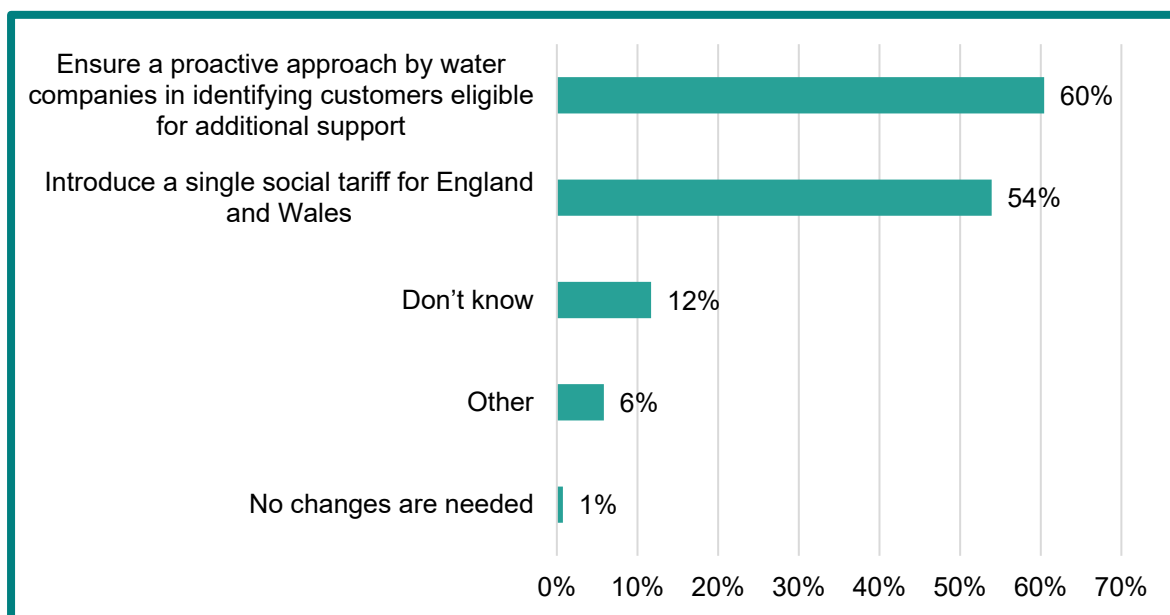
We asked respondents to expand if they selected “**other**” and received 368 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 25% of responses
- Increased penalties and enforcement – mentioned in 9% of responses
- Effective complaint handling – mentioned in 9% of responses

Q40. What, if any, changes to the regulatory framework would improve support for customers in vulnerable circumstances?

This question received 41,672 responses in total. 1,284 responses were received through Citizen Space or email and 24,987 were received through the joint 38 Degrees and Surfers Against Sewage campaign. 15,401 responses to this question were received through the Organise survey. However, the campaign asked about “people struggling with bills” rather than “people in vulnerable circumstances” as phrased in the Commission’s questionnaire. These responses have been integrated into the analysis, but this difference should be kept in mind when interpreting results. Results are shown as a percentage of total respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top two changes respondents believed would improve support for customers in vulnerable circumstances were:

1. Ensure a proactive approach by water companies in identifying customers eligible for additional support – selected by 60% of respondents
2. Introduce a single social tariff for England and Wales – selected by 54% of respondents

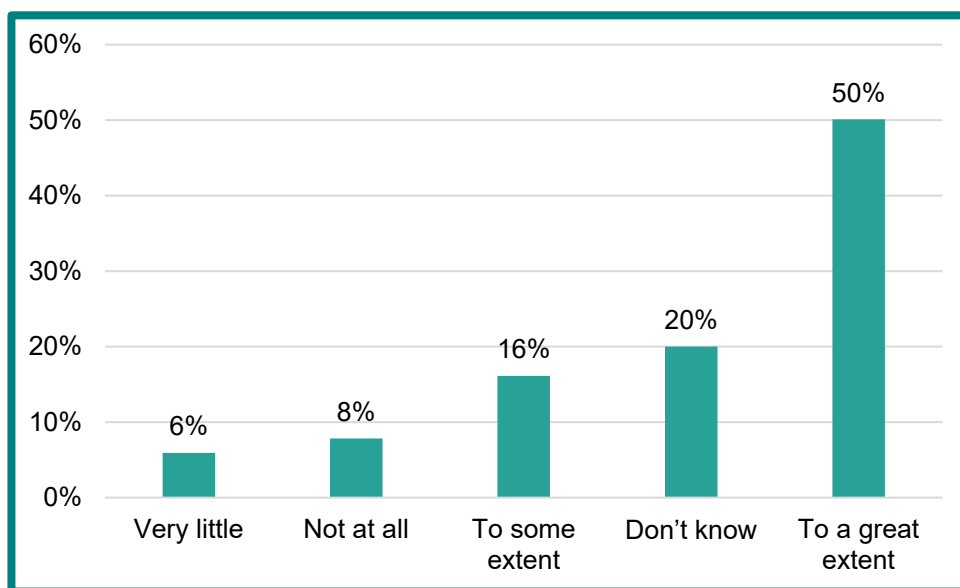
We asked respondents to expand if they selected “**other**” and received 2,973 responses total. 209 responses were received through Citizen Space and email, and 1,477 were received through the joint 38 Degrees and Surfers Against Sewage campaign. 1,287 responses to this question were received through the Organise survey. The top three themes raised in responses were:

- Nationalisation – mentioned in 41% of responses
- Fair water pricing – mentioned in 10% of responses
- Control of financial practices – mentioned in 9% of responses

Company structures, ownership, governance and management

Q41. To what extent is change required to the economic regulatory framework to support water companies' financial resilience?

This question received 1,315 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

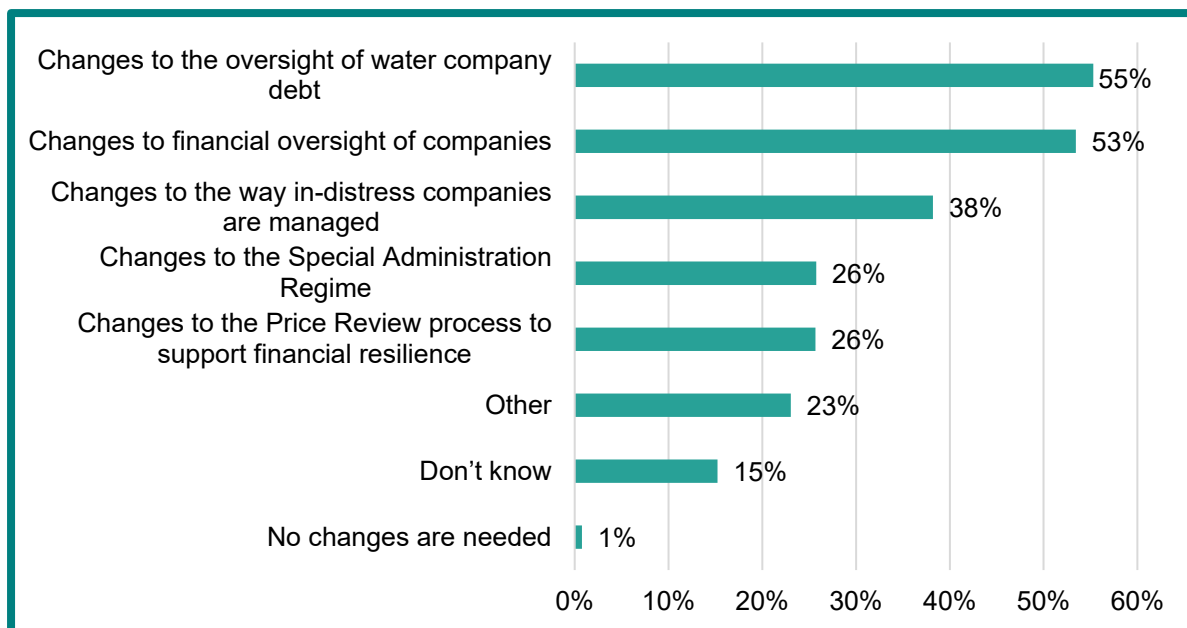


66% of respondents felt that changes to the economic regulatory framework to support water companies' financial resilience are needed, either to a great or to some extent. 14% believed that very little to no change is needed and 20% were unsure.

Q42. Which of the following changes to the economic regulatory framework, if any, would improve outcomes for the water industry?

This question received 1,293 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to the economic regulatory framework that respondents believed would improve outcomes for the water industry were:

1. Changes to the oversight of water company debt – selected by 55% of respondents
2. Changes to financial oversight of companies – selected by 53% of respondents
3. Changes to the way in-distress companies are managed – selected by 38% of respondents

We asked respondents to expand if they selected “**other**” and received 396 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 46% of responses
- Regulation of bonuses and dividends – mentioned in 11% of responses
- Improving financial resilience – mentioned in 11% of responses

Q43. Do you think there is evidence on the historical relationship between debt, dividends, and expenditure at water companies that the Commission should be looking at?

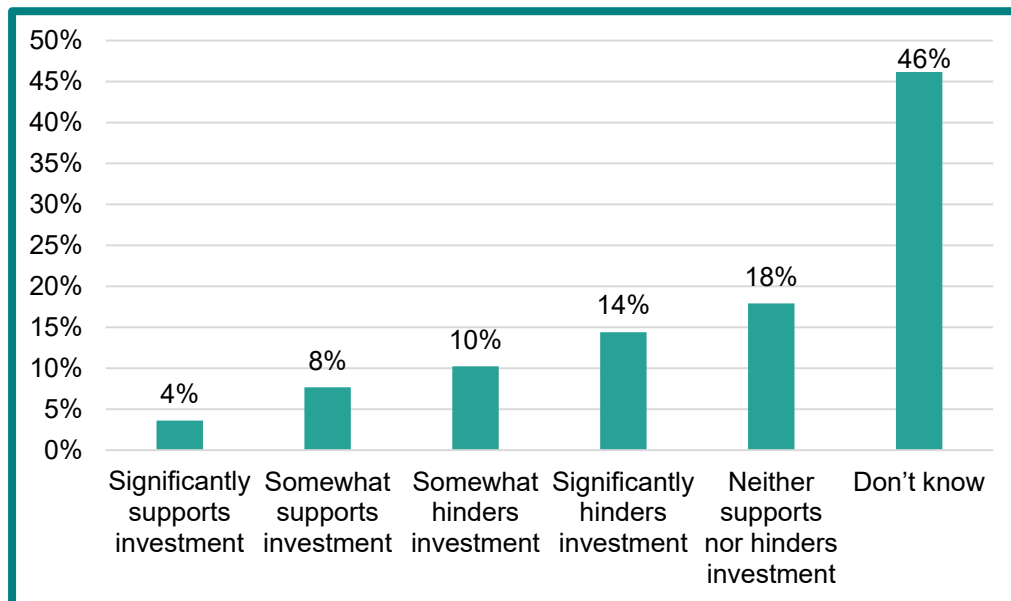
This was an open-text question and received 880 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Debt-funded dividends – mentioned in 39% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 16% of responses

- Historical underinvestment – mentioned in 15% of responses

Q44. To what extent does the economic regulatory framework support or hinder investment into the sector?

This question received 1,250 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



Responses here show mixed overall sentiment, with 46% unsure and 18% indicating that the regulatory framework neither supports nor hinders investment. 24% indicated that the framework either somewhat or significantly hinders investment, while 12% indicated that it either somewhat or significantly supports investment.

Q45. How do financial returns in the water sector compare to other similar sectors (for example, energy)?

This was an open-text question and received 523 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Nationalisation – mentioned in 17% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 16% of responses
- Higher returns – mentioned in 13% of responses

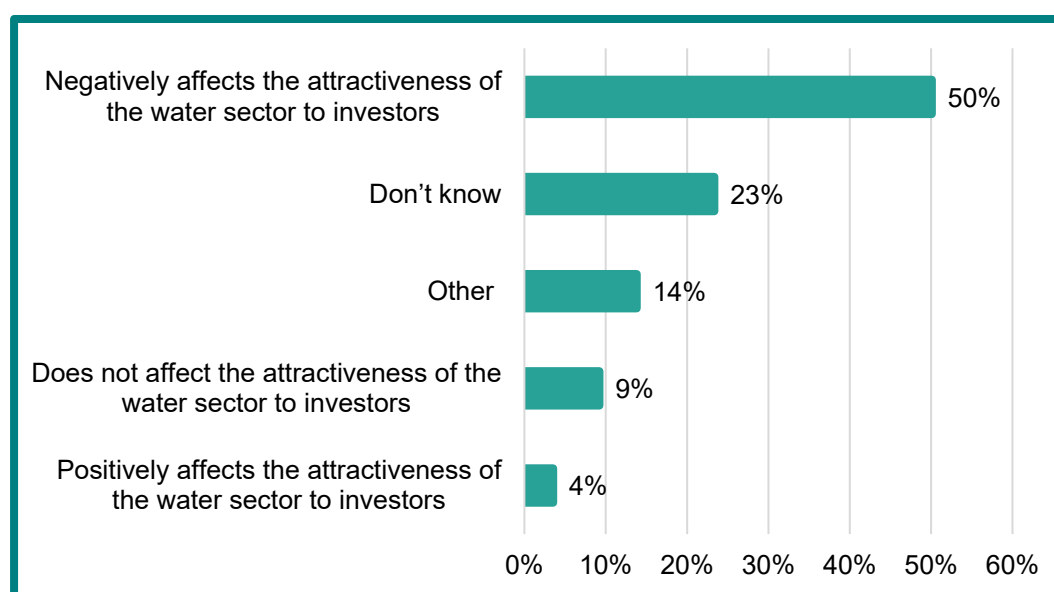
Q46. What options, if any, would incentivise investment in the water sector?

This was an open-text question and received 622 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Nationalisation – mentioned in 28% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 17% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 10% of responses

Q47. How does the public and political portrayal of water companies in the media and elsewhere affect the attractiveness of the water sector to investors?

This question received 1,246 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



50% of respondents believe that the public and political portrayal of water companies in the media and elsewhere negatively affects the attractiveness of the water sector to investors. 9% believe that it does not have an impact and 4% felt it has a positive impact. 23% were unsure and 14% selected other.

We asked respondents to expand if they selected “**other**” and received 292 responses. The top three themes raised in responses were:

- Negative portrayal and deserved criticism – mentioned in 19% of responses
- Nationalisation – mentioned in 12% of responses

- Negative portrayal reduces investor confidence – mentioned in 12% of responses

Q48. To what extent should further competition in the water industry be encouraged through regulation?

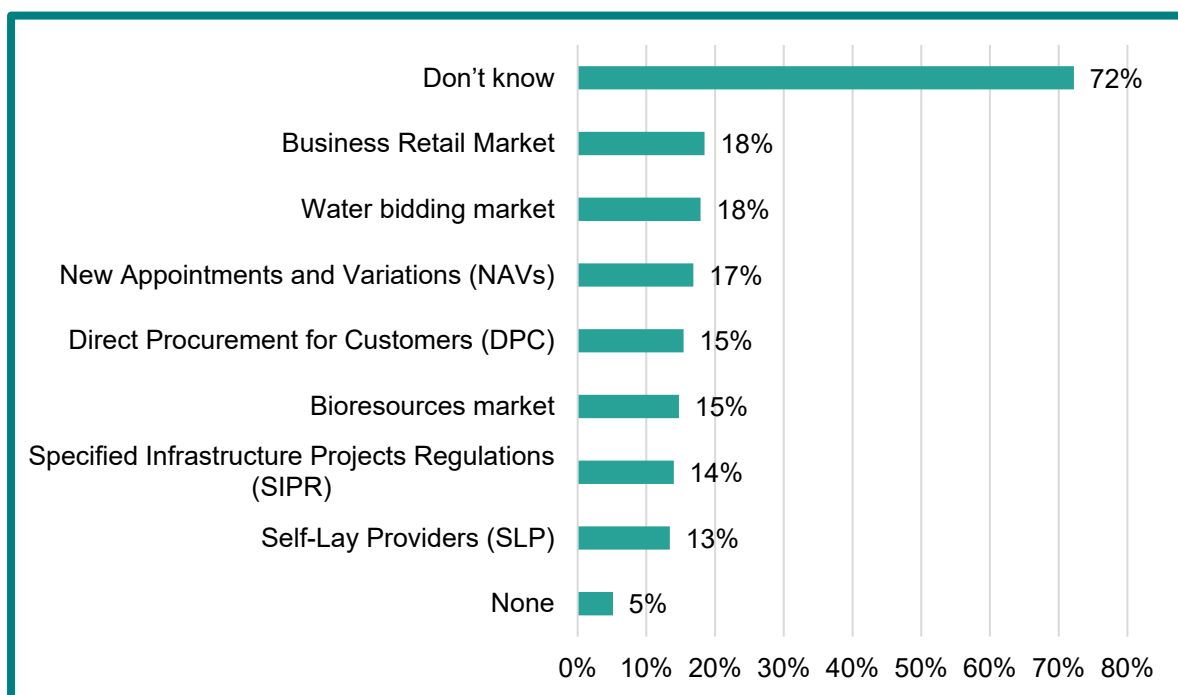
This was an open-text question and received 813 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Competition challenges – mentioned in 30% of responses
- Nationalisation – mentioned in 23% of responses
- Criticisms of competition and privatisation – mentioned in 17% of responses

Q49. Which of the following schemes, if any, have failed to provide effective levels of competition and efficiency?

This question received 1,051 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



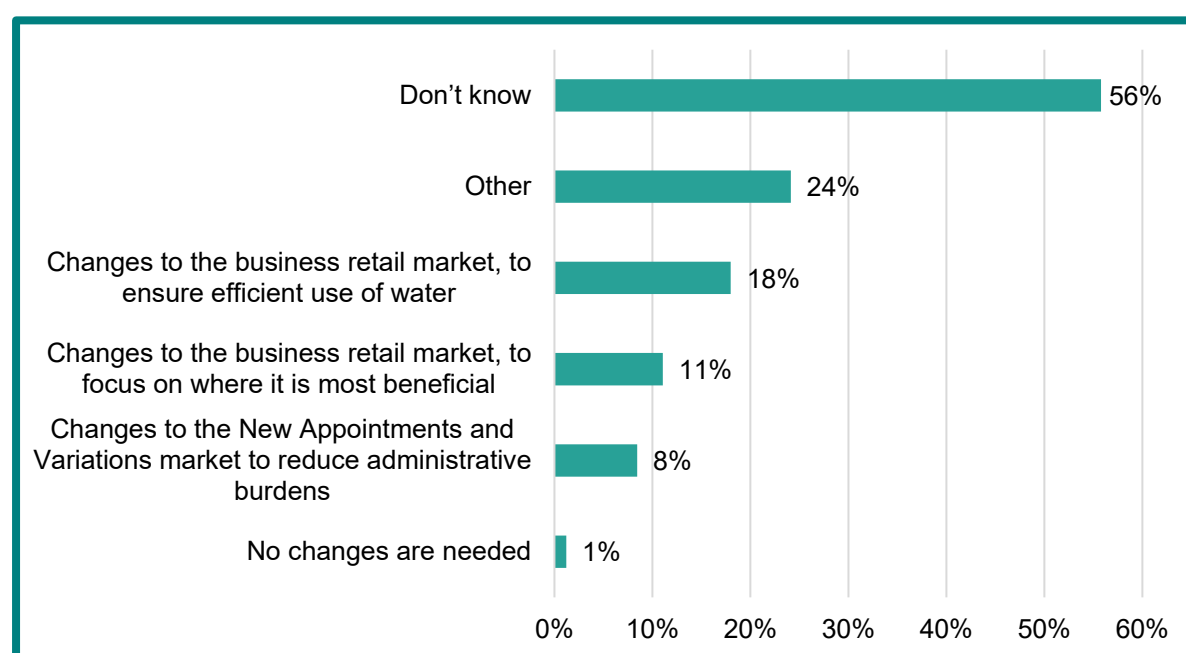
72% of respondents selected “don’t know” in response to this question. After this, the top three schemes’ respondents believed have failed to provide effective levels of competition were:

1. Business retail market – selected by 18% of respondents
2. Water bidding market – selected by 18% of respondents
3. New appointments and variations (NAVs) – selected by 17% of respondents

Q50. Which of the following changes to competition schemes, if any, would improve outcomes for the sector?

This question received 995 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



56% of respondents selected “don’t know” in response to this question. After this, the top three changes to competition schemes that respondents believed would improve outcomes for the water sector were:

1. Other (expanded on below) – selected by 24% of respondents
2. Changes to the business retail market, to ensure efficient use of water – selected by 18% of respondents

3. Changes to the business retail market, to focus on where it is most beneficial – selected by 11% of respondents

We asked respondents to expand if they selected “**other**” and received 288 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 39% of responses
- Ineffectiveness of water sector competition – mentioned in 18% of responses
- Other (responses that covered distinct or less common topics – mentioned in 9% of responses

Q51: To what extent would greater market tendering of infrastructure delivery projects improve outcomes?

This was an open-text question and received 402 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Negative outcomes through tendering – mentioned in 27% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 20% of responses
- Improved outcomes through tendering – mentioned in 16% of responses

Q68. What impact, if any, has consolidation of water companies had on their performance?

This was an open-text question and received 635 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Negative impacts of consolidation – mentioned in 36% of responses
- Negative impacts of profit driven management – mentioned in 13% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 13% of responses

Q69. What impact, if any, does whether or not a water company is listed on the stock exchange have on their performance?

This was an open-text question and received 688 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Profit-driven conflicts – mentioned in 35% of responses
- Dividend prioritisation – mentioned in 14% of responses
- Mixed performance impact – mentioned in 13% of responses

Q70. What impact, if any, do complex company structures like Whole Business Securitisation have on water company performance?

This was an open-text question and received 384 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Negative impact on performance – mentioned in 27% of responses
- Regulatory challenges and transparency – mentioned in 20% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 16% of responses

Q71. What impact, if any, does the type of investor (for example, private equity firms, pension funds) have on water company performance?

This was an open-text question and received 660 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Pressure for dividends harms investment – mentioned in 19% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 15% of responses
- Environmental impact of profit-driven investment – mentioned in 14% of responses

Q72. How effective has Dŵr Cymru Welsh Water's not-for-profit model been in driving improved outcomes?

This was an open-text question and received 1,235 responses in total. 176 responses were received through Citizen Space and email, 1,059 were received through the joint 38 Degrees and Surfers Against Sewage campaign. This question was not covered in the Organise campaign survey, so their responses have not been included here. Results are shown as a percentage of total respondents to this question (%).

The top three themes raised in responses were:

- Ineffectiveness of not-for-profit model – mentioned in 23% of responses

- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 20% of responses
- Not-for-profit model benefits – mentioned in 17% of responses

Q73. What are the risks associated with Dŵr Cymru Welsh Water's not-for-profit model?

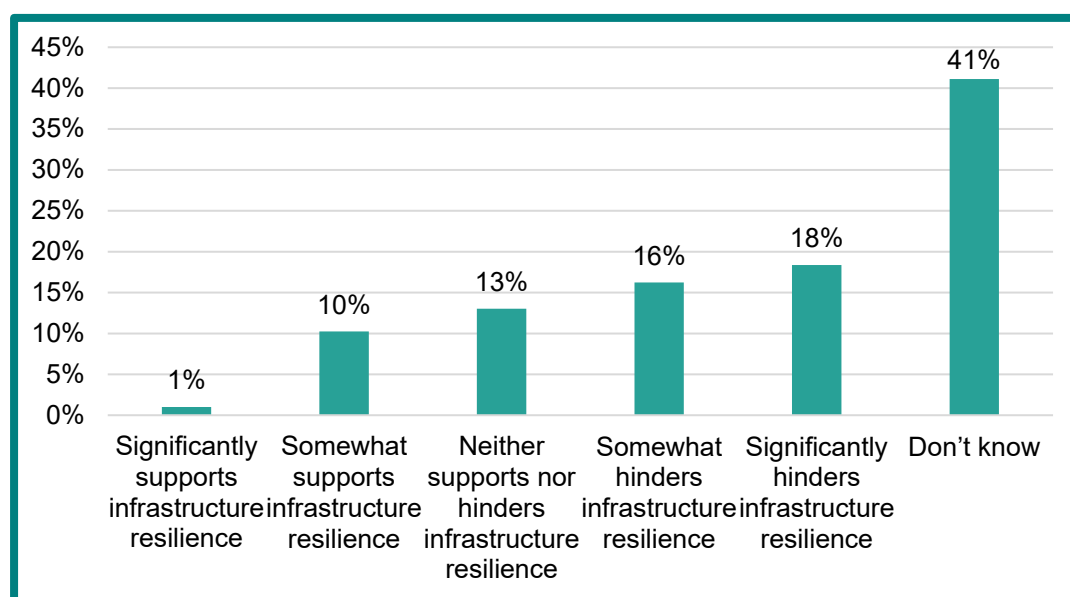
This was an open-text question and received 135 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Investor and financial risks – mentioned in 26% of responses
- Lack of knowledge (respondents cited lack of knowledge or relevance) – mentioned in 17% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 11% of responses

Infrastructure and asset health

Q59. To what extent does the overall water regulatory framework support or hinder infrastructure resilience? When considering your answer, please think about future pressures including factors such as climate change and population growth.

This question received 1,182 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

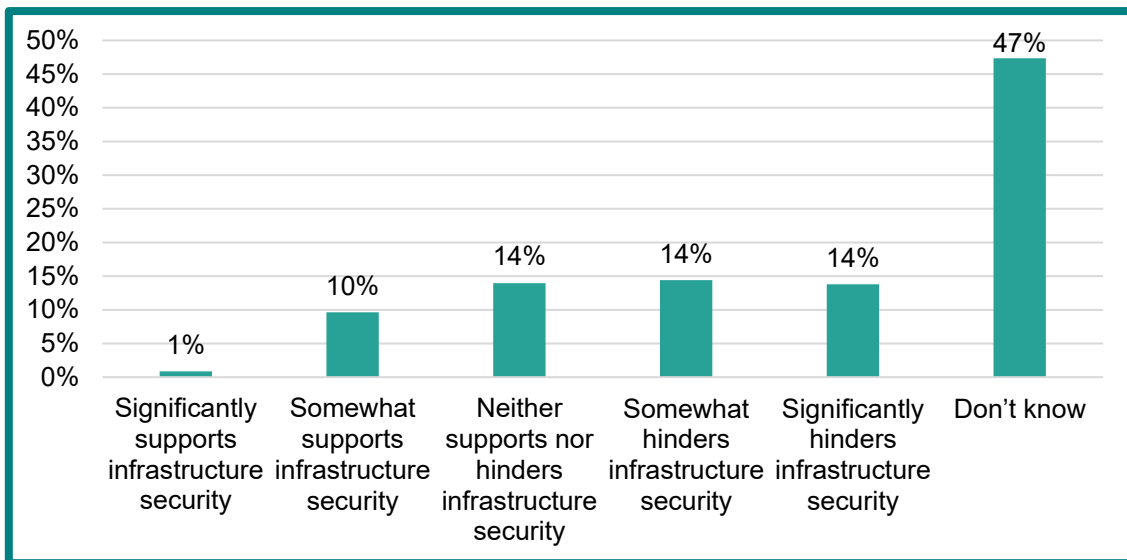


To note: Figures do not add up to 100% due to rounding.

Sentiment on the extent to which the water regulatory framework supports or hinders infrastructure resilience was mixed. 41% of respondents were unsure. 34% of respondents believed the water regulatory framework somewhat or significantly hinders infrastructure resilience. 13% responded neutrally, and 11% felt it somewhat or significantly supports infrastructure resilience.

Q60. To what extent does the overall water regulatory framework support or hinder infrastructure security? When considering your answers, please think about evolving security threats such as cyber security.

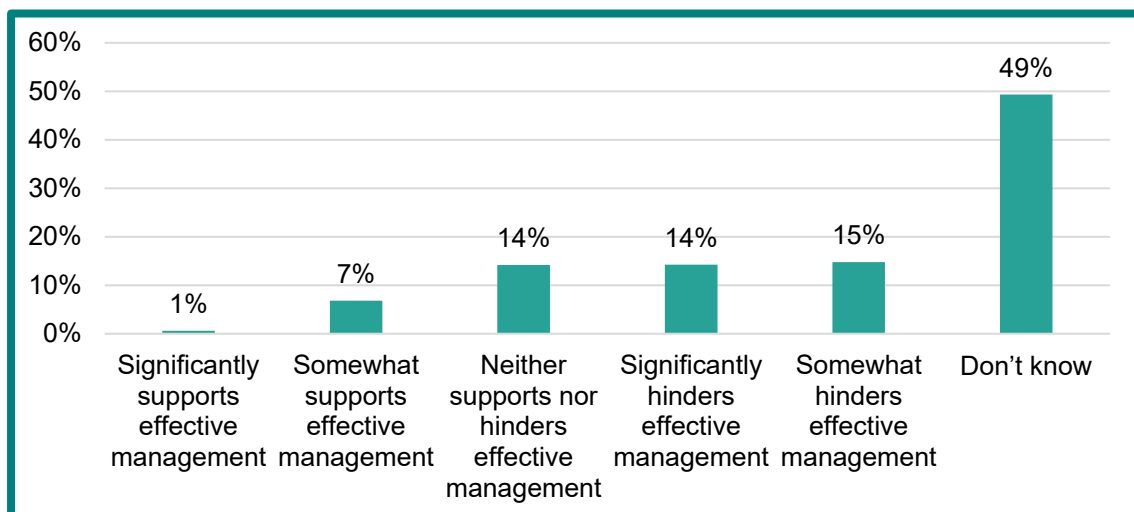
This question received 1,153 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).



The sentiment in response to the extent to which the regulatory framework supports or hinders infrastructure security was mixed with 47% unsure. 28% of respondents felt it somewhat or significantly hinders infrastructure security whereas 11% believed it either somewhat or significantly supports infrastructure security. 14% believed it neither supports nor hinders infrastructure security.

Q61. To what extent does the overall water regulatory framework support or hinder effective management of supply chain risks? When considering your answers, please think about disruption in and constraints from supply chains.

This question received 1,143 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

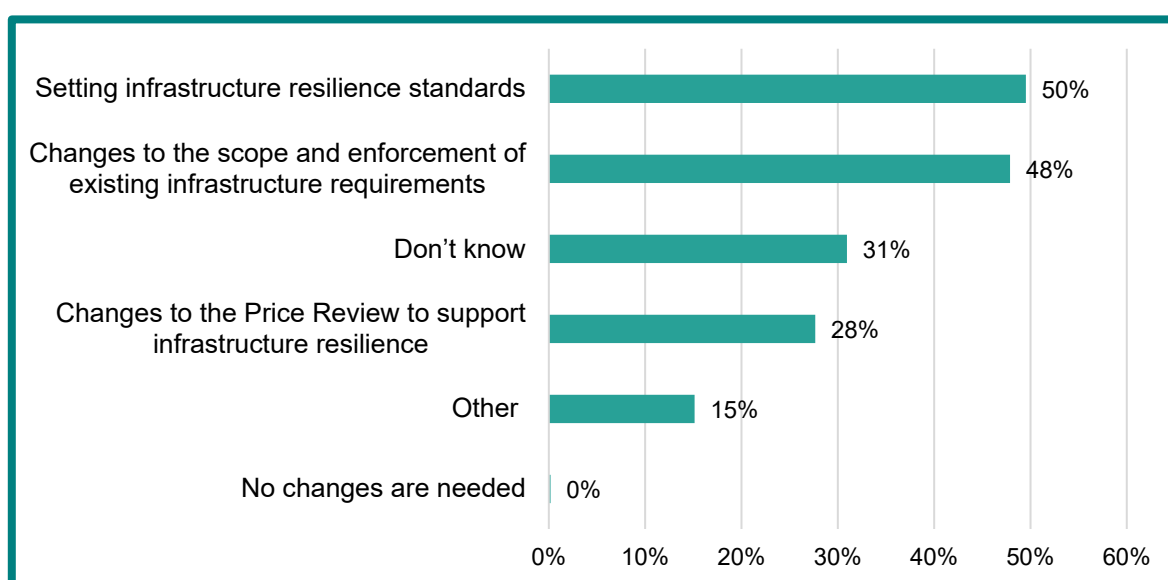


Perception of the extent to which the water regulatory framework supports or hinders effective management of supply chain risks was unclear with 49% of respondent unsure. 29% believed it somewhat or significantly hinders effective management whereas 7% felt it somewhat supports effective management. Just 1% felt it significantly supports effective management.

Q62. What changes, if any, could be made to the overall water regulatory framework to better support infrastructure resilience?

This question received 1,157 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes to the overall water regulatory framework that respondents believed would better support infrastructure resilience were:

1. Setting infrastructure resilience standards – selected by 50% of respondents
2. Changes to the scope and enforcement of existing infrastructure requirements – selected by 48% of respondents
3. Don't know – selected by 31% of respondents

We asked respondents to expand if they selected “**other**” and received 227 responses. The top three themes raised in responses were:

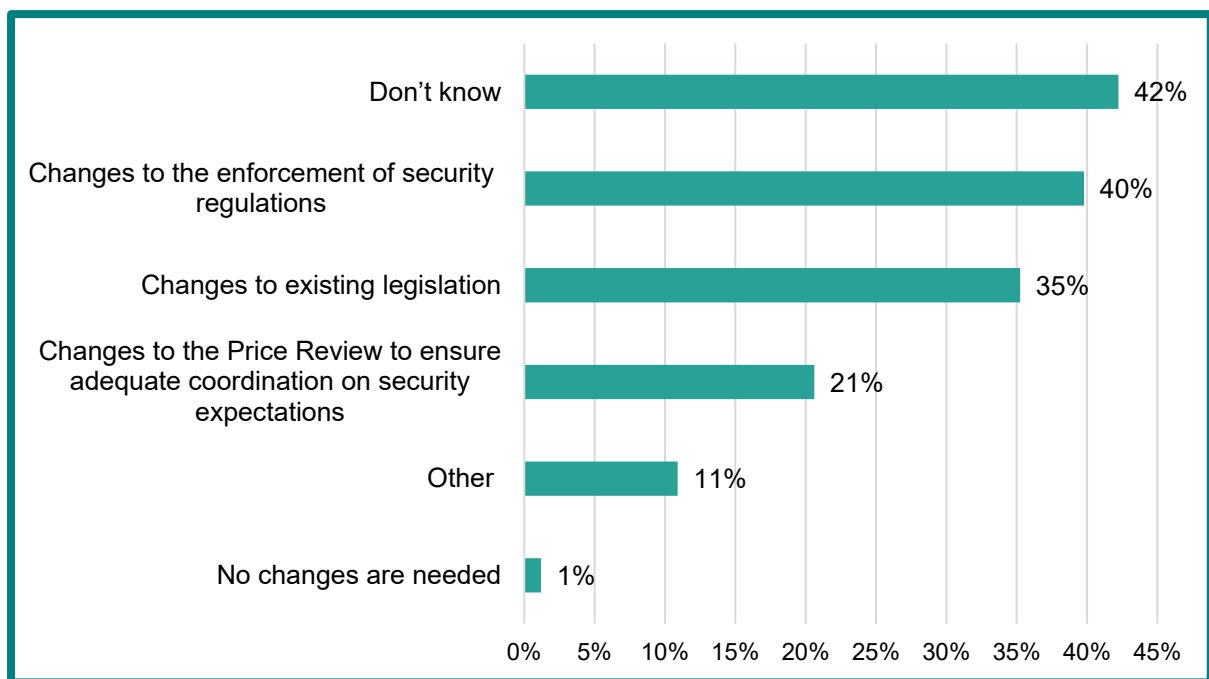
- Nationalisation – mentioned in 32% of responses

- Other (responses that covered distinct or less common topics) – mentioned in 13% of responses
- Resilience standards – mentioned in 11% of responses

Q63. What changes, if any, could be made to the overall water regulatory framework to better support infrastructure security?

This question received 1,101 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three options for changes to the overall water regulatory framework that respondents believed would better support infrastructure security were:

1. Don't know – selected by 42% of respondents
2. Changes to the enforcement of security regulations – selected by 40% of respondents
3. Changes to existing legislation, such as security emergency measures direction and cyber security regulations – selected by 35% of respondents

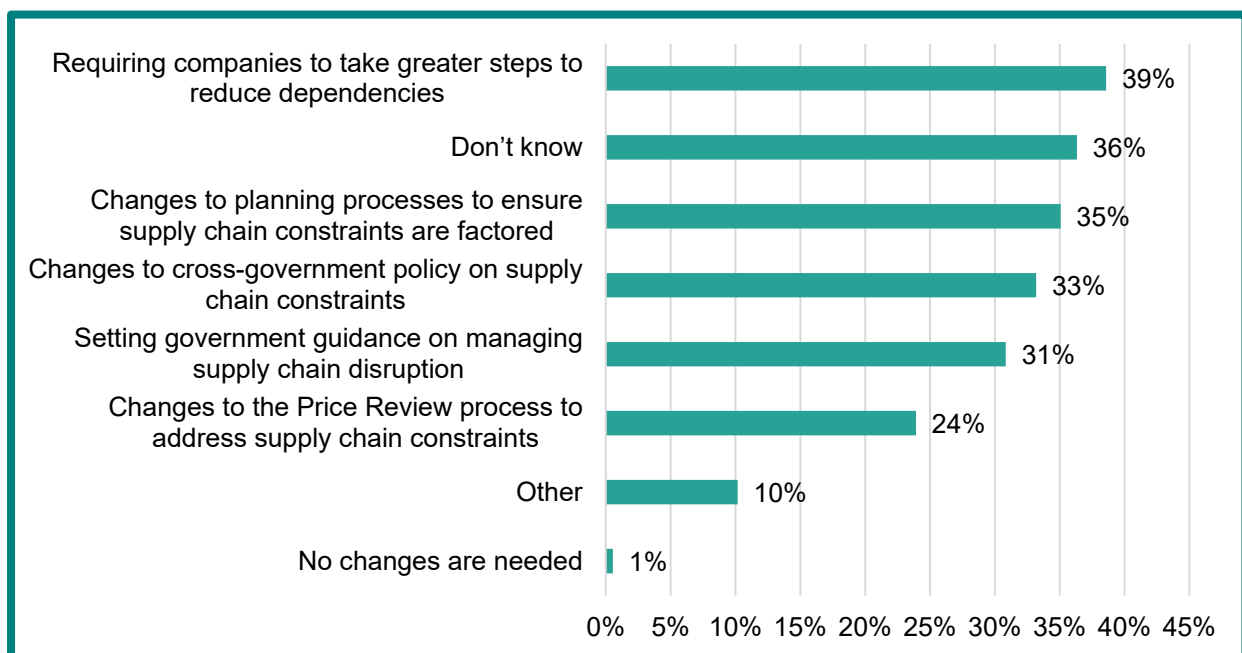
We asked respondents to expand if they selected “**other**” and received 146 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 45% of responses
- No reason given (responses didn't provide a substantive answer to the question) – mentioned in 9% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 8% of responses

Q64. What changes, if any, could be made to the overall water regulatory framework to better manage risks from supply chains?

This question received 1,112 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three options for changes to the overall water regulatory framework that respondents believed would better manage risks from supply chains were:

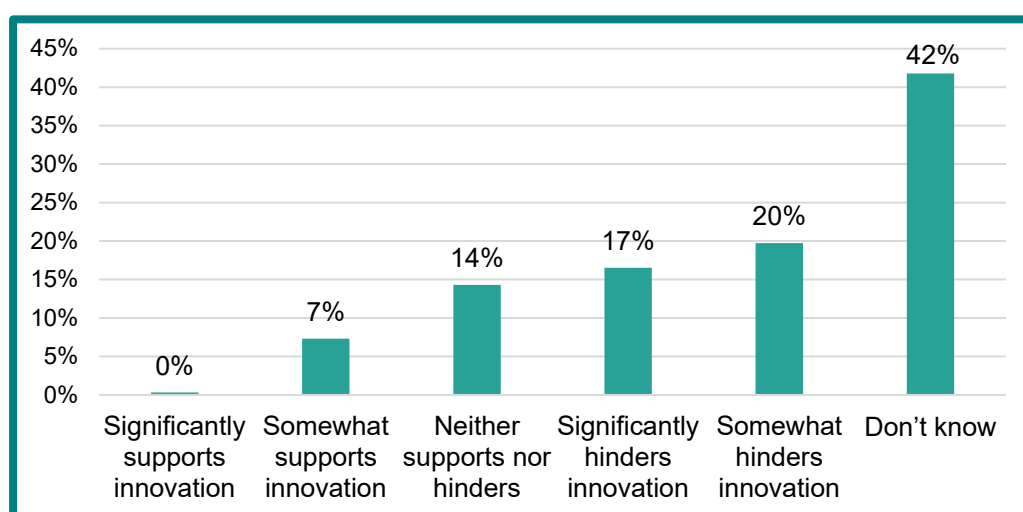
1. Requiring companies to take greater steps to reduce dependencies (for example, onshoring chemicals production) – selected by 39% of respondents
2. Don't know – selected by 36% of respondents
3. Changes to planning processes to ensure supply chain constraints are factored – selected by 35% of respondents

We asked respondents to expand if they selected “**other**” and received 142 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 40% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 16% of responses
- No reason given (responses didn’t provide a substantive answer to the question) – mentioned in 15% of responses

Q65. To what extent does the overall water regulatory framework currently support or hinder innovation?

This question received 1,216 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

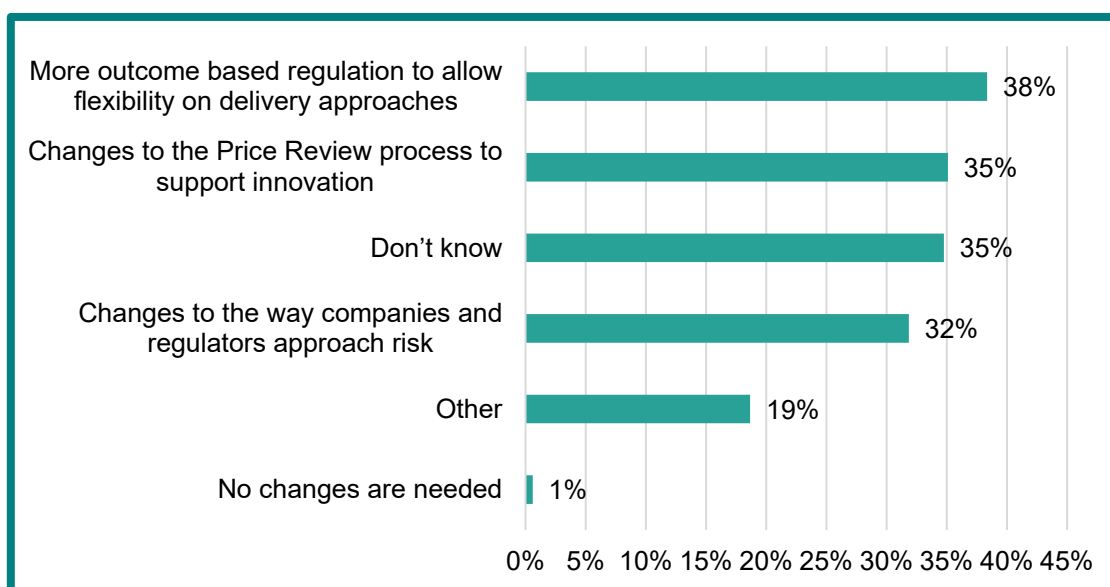


42% of respondents were unsure of the extent to which the water regulatory framework supports or hinders innovation. 37% felt it somewhat or significantly hinders innovation whereas 7% felt it somewhat supports innovation. <1% felt it significantly supports innovation and 14% believed it did neither.

Q66. Which of the following changes in the sector, if any, would enable innovation outcomes?

This question received 1,168 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. Results are shown as a percentage of respondents to this question (%).

Respondents were asked to select all that apply. As a result, the total percentage across all response options exceeds 100% as each respondent could choose multiple answers.



The top three changes in the sector that respondents believed would enable innovation outcomes:

1. More outcome-based regulation to allow flexibility on delivery approaches – selected by 38% of respondents
2. Changes to the price review process to support innovation – selected by 35% of respondents
3. Don't know – selected by 35% of respondents

We asked respondents to expand if they selected “**other**” and received 264 responses. The top three themes raised in responses were:

- Nationalisation – mentioned in 25% of responses
- Other (responses that covered distinct or less common topics) – mentioned in 18% of responses
- Encourage sharing and collaboration of data from innovation trials – mentioned in 18% of responses

Q67. What opportunities, if any, do new technologies present for companies and the regulators?

This was an open-text question and received 426 responses. This question was not covered in the joint 38 Degrees and Surfers Against Sewage or Organise campaign surveys, so no campaign responses have been included here. The top three themes raised in responses were:

- Advanced monitoring and transparency – mentioned in 28% of responses
- Innovative water treatment solutions – mentioned in 18% of responses
- Environmental benefits and resilience – mentioned in 15% of responses