

# Accent



# Affordability and Acceptability Testing Quantitative Fieldwork

Final Report

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# 1 Executive Summary

## 1.1 Assurance Statement

This fieldwork was conducted in accordance with the requirements of the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

## 1.2 Methodology and Fieldwork

987 Household (HH) interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online):

- 566 interviews were generated by an email approach
- 421 by post; (including 13 via paper questionnaires).

The Ofwat mandated minimum sample size was 500.

117 Non-household (NHH) interviews were conducted:

- 48 by NHH panel (Quest Mindshare)
- 23 by telephone; and
- 46 by email contact with customers of NHH retailers operating in the South Staffs and Cambridge supply areas.

The Ofwat mandated minimum sample size was 100.

In addition, separate surveys were sent to members of SSC’s H2Online Community, resulting in 32 South Staffs and 22 Cambridge interviews, exceeding the original target of 50 across both supply areas. These were not included in SUP14 tables or in the data used to generate this report (other than for the specific H2Online section), in order to comply with the guidance.

## 1.3 Summary of Results

### Financial temperature check

The economic situation was found to be challenging – with 34% of households reporting having had difficulty with paying household bills at least some of the time. 46% of households stated that it was difficult to manage financially or are just about getting by. 32% expect their financial situation to worsen in the next few years.

Cambridge Water participants were less likely to struggle financially with 76% struggling rarely or never to pay household bills, compared to 61% for South Staffs Water.

## Affordability – combined bill

Affordability of the combined bill was low – with 14% of participants saying the bill increases would be fairly or very easy to afford.

The overall affordability figure stands at 22% for NHH participants compared to 11% for HH participants.

Financially struggling households found the bills particularly unaffordable, with 75% of households who self-identified as financially struggling finding the increases very or fairly difficult to afford. Affordability was higher amongst metered users (18%) than unmetered users (9%).

## Affordability – water only bill

Affordability of the water only bill was higher than the combined although it remained low with 19% of participants able to afford it fairly or very easily.

The overall affordability figure stands at 24% for NHH participants compared to 17% for HH participants.

Cambridge Water participants, HH and NHH, were significantly more likely to find the water only bill affordable at 26% compared to 17% for South Staffs Water participants.

C1C2 and DE social grades were significantly more likely to report that the water only bill would be difficult to afford with 53% of DE participants finding the increase difficult or very difficult compared to just 25% of AB participants.

## Acceptability

Acceptability of the plan was much higher than affordability – with 70% of household participants finding the plan acceptable (either fairly or very). The net acceptability figures for Cambridge and South Staffs were very similar, 71% and 70% respectively.

The top three reasons for acceptability across HH and NHH were:

- support for what SSC is trying to do in the long term (54%)
- the plan focusing on the right services (48%); and
- trust that SSC is doing what's best for customers (19% overall with South Staffs' participants significantly more likely than Cambridge participants to choose this option).

The main reasons for participants not finding the plan acceptable were financially driven:

- the proposed bill increases being too high (39%)
- South Staffs' profits too high (32%); and
- an inability to afford the proposals (30%).



## Performance commitments and key investment areas

51% of total participants viewed reducing leakage as the most important performance commitment, followed by preventing issues with the taste, smell and appearance of tap water (35%) and then reducing the duration of water interruptions (9%).

Reducing leakage was the top water rated investment priority for both Cambridge participants (55%) and South Staffs participants (50%).

Of the three key investment areas (protect and improve the environment, improve water quality and increasing the resilience of the water network), protect and improve the environment was the clear priority – with 41% of total participants choosing this option. The next most popular was improving water quality (31%) followed by increasing resilience of the water network (23%).

Improving water quality was significantly more important for South Staffs participants with 32% prioritising this investment area compared to 25% of Cambridge participants.

## Intergenerational phasing

For just over two-fifths of total participants (42%), an increase in bills starting sooner is preferable, spreading increases across different generations of bill payers. 39% of total participants felt they did not know enough to give an answer and 19% of participants preferred an increase in bills starting later, putting more of the increases onto younger and future bill payers.

Both Cambridge and South Staffs audiences would prefer increases to start sooner (52% and 40% of responses respectively) compared to starting later (16% and 19% respectively). Cambridge participants were significantly more likely to want increases to start sooner than South Staffs participants.

A significantly large proportion of participants from South Staffs (41%) said they didn't know enough to answer with only 32% of Cambridge participants selecting this option.

# 2 INTRODUCTION

## 2.1 Background

SSC is responsible for clean water services in the South Staffordshire (SSW) and Cambridge (CAM) regions of England. Between both regions, they supply close to 388 million litres of clean water a day to more than 740,000 million homes and businesses.

The water sector in England and Wales faces a series of long-term challenges. Meeting these challenges requires business planning decisions to be made in a long-term context. At PR24, water companies are required to set out their five-year business plans in the context of a 25-year long-term delivery strategy. This will help ensure that what is delivered in the short term is likely to maximise long-term value for customers, communities and the environment.

As part of this process, all water companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting their plans for the upcoming Price Review (PR24) in October 2023.

To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken. This guidance has been designed to facilitate consistency and comparability between companies (e.g. question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme).

SSC has commissioned Accent to carry out the qualitative and quantitative components of affordability and acceptability testing (A&AT) with their customers. This report represents the findings from the quantitative stage.

## 2.2 Objectives

**The overarching objective is to demonstrate customer support for the SSC PR24 Business Plan ‘Securing Your Water Future’.**

More specifically, the research aims to:

- Ensure that customers priorities and preferences are driving SSC’s PR24 investment plan decisions where appropriate
- Provide evidence to demonstrate that customers consider the forecast bill impacts to be acceptable at various stages of development, including on affordability, levels of service and operational risk in the short and long term
- Understand why customers have formed their opinions, and if plans are not thought to be acceptable, to understand what would need to change in order for the plan to become acceptable; and

- Demonstrate that the engagement with customers reflects the potential range of affordability impacts in different futures.

Accent conforms to the requirements of the quality management system ISO 20252:2019.

## 2.3 Report Structure

This document is the report on the quantitative stage of the affordability and acceptability testing for SSC. This report describes survey design and methodologies alongside customers' views on the affordability and acceptability of South Staffs AMP8 business plan.

- Appendix A provides an overview of how Accent have adhered to Ofwat's standards for high quality customer research.
- Appendix B outlines additional information that is available upon request.
- Appendix C describes some of the limitations of the research.
- Appendix D contains fieldwork materials that were used during this research such as invitation letters and emails.
- Appendix E includes the online questionnaires for South Staffs and Cambridge participants, both for the main survey and for the separate H2Online Community survey.
- Appendix F displays the paper questionnaires sent to participants who requested a paper version for accessibility reasons.
- Appendix G is a copy of the cognitive report that was submitted by Accent following the quantitative cognitive interviews which tested the questionnaire and stimulus materials for this research.
- Appendix H is a briefing note issued by Accent and SSC detailing proposed alterations from the guidance approved by the company's Independent Challenge Group (ICG) Chair.

# 3 METHODOLOGY

## 3.1 Introduction

The methodology was heavily prescribed by the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

The guidance amended and clarified at a number of points throughout the research period. In all respects (unless documented within this report) the guidance in effect at the time was consistently followed.

SSC’s ICG Chair was informed and consulted throughout the research process, including inception, design, and fieldwork (particularly on parts of the research where the guidance was not specific, there was room for interpretation, or in the rare instance that it was thought best not to follow the guidance on a particular issue).

## 3.2 Cognitive testing

Cognitive testing was carried out. Four household and two non-household cognitive interviews took place through Zoom with the participant filling in the online survey and an Accent moderator observing and probing.

Findings were presented to the ICG, and all changes resulting from the cognitive testing process were implemented with ICG approval. The full report can be found in Appendix G.

## 3.3 Sampling and approach

### Household (HH) sampling

SSC is one company with two supply areas, South Staffs Water and Cambridge Water. South Staffs Water and Cambridge Water provide clean water services only, with waste water services provided by Severn Trent in the South Staffs region and Anglian Water in the Cambridge region. The target number of interviews across both supply areas was 900<sup>1</sup>.

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation.

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<sup>1</sup> The minimum sample size listed in the guidance issued by Ofwat and CCW was 500 HH.

Primarily, the recruitment used a push-to-web approach with online survey links provided in the letter and email invitations and QR codes for the letter invitations only. Participants were also offered the opportunity to request a paper version of the questionnaire to fill in and post back – 31 such requests were received and honoured.

The guidance mandates that areas of differing deprivation (as defined by the Index of Multiple Deprivation (IMD)) be boosted or suppressed by certain percentages, to account for lower response rates amongst more deprived areas and their importance in the research. The process by which this component of the guidance was followed, was to effectively convert the percentage given in the guidance to a “boost factor”, to sample by IMD decile naturally (using a consistent assumed response rate) and then adjust the number of selections by the boost factor. Where the IMD decile was not known, no boost was applied. The calculations used to define the universe for the research (and from which all sub-sampling was conducted), follows:

Cambridge

IMD Decile	Ofwat adjustment factor	Properties	Percentage:	ideal interview % split	ideal interview n split	Assumed baseline email response rate	Sample to be drawn (unadjusted)	<i>Sample to be drawn (adjusted)</i>
1	1.25	0	0.00%	0.00%	0	3%	0	0
2	1.25	1866	1.45%	1.45%	4	3%	130	163
3	1.1	4576	3.55%	3.55%	10	3%	320	352
4	1.1	1415	1.10%	1.10%	3	3%	99	109
5	1	15050	11.69%	11.69%	32	3%	1052	1052
6	1	11640	9.04%	9.04%	24	3%	814	814
7	0.9	18070	14.03%	14.03%	38	3%	1263	1137
8	0.9	21532	16.72%	16.72%	45	3%	1505	1354
9	0.75	22817	17.72%	17.72%	48	3%	1595	1196
10	0.75	29956	23.26%	23.26%	63	3%	2094	1570
Unknown	1	1846	1.43%	1.43%	4	3%	129	129
TOTAL		128768			270		9000	7876

## South Staffs

IMD Decile	Ofwat adjustment factor	Properties	Percentage:	ideal interview % split	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Sample to be drawn (adjusted)
1	1.25	70134	13.08%	13.08%	82	3%	2747	3434
2	1.25	97326	18.15%	18.15%	114	3%	3813	4766
3	1.1	50263	9.38%	9.38%	59	3%	1969	2166
4	1.1	44724	8.34%	8.34%	53	3%	1752	1927
5	1	45583	8.50%	8.50%	54	3%	1786	1786
6	1	44691	8.34%	8.34%	53	3%	1751	1751
7	0.9	46088	8.60%	8.60%	54	3%	1805	1625
8	0.9	49935	9.31%	9.31%	59	3%	1956	1760
9	0.75	47353	8.83%	8.83%	56	3%	1855	1391
10	0.75	35443	6.61%	6.61%	42	3%	1388	1041
Unknown	1	4548	0.85%	0.85%	5	3%	178	178
TOTAL		536088			630		21000	21825

This ensured that the selections matched the profiles of the Cambridge and South Staffs areas and boosted each IMD decile appropriately in line with the guidance.

Sample exclusions were kept to a minimum:

- Any that were not live household accounts: e.g. deceased, moved/moving out of area, voids, unconnected properties
- Any accounts for new properties where there was no billing data captured yet
- Any accounts which had previously opted of market research
- Any customers who were being contacted to take part in SSC's simultaneous PR24 tariff research (including social tariff) to prevent customer complaints due to volume of surveys in the same time period
- Any who were deemed high risk on the PSR: e.g. suffering from dementia or another serious medical condition that would mean they would not be able to complete a survey cognitively
- Any account which had negative bill amounts showing for the last 12 months for their clean water bill; and
- Any account which had no waste water bill as they are not connected to the mains.

No quotas were set (in line with the Ofwat and CCW guidance).

## 3.4 Fieldwork

### Household (HH)

An initial sample was drawn based on a response rate of 5% to ensure we did not invite more participants than was necessary. The proportions by IMD decile as defined above, were maintained. Records with an email address were sent a single email, records without, a letter. Responses to this mailing follow:



## Cambridge

Interviews wanted	270				
Assumed %	5.00%				
n=	5400				
IMD Decile					
	Total	email	Post	Total	
1	0	0	0	0	
2	112	49	63	112	
3	241	121	118	239	
4	75	42	33	75	
5	721	354	366	720	
6	558	267	291	558	
7	779	445	334	779	
8	929	428	500	928	
9	820	399	420	819	
10	1077	476	600	1076	
Unknown	88	80	8	88	
TOTAL	5400	2661	2733	5394	
Interviews after initial mailing		161	150	311	
Conversion rate after initial mailing		6.05%	5.49%	5.77%	

No reminders were required for the Cambridge region. Included within the above, three paper questionnaires were returned by Cambridge participants.

## South Staffs

Interviews wanted	630				
Assumed %	5.0%				
n=	12600				
IMD Decile					
	Total	email	Post	Total	
1	1983	865	1111	1976	
2	2751	1221	1524	2745	
3	1250	591	657	1248	
4	1113	579	529	1108	
5	1031	527	502	1029	
6	1011	487	520	1007	
7	938	447	489	936	
8	1016	490	523	1013	
9	803	413	387	800	
10	601	273	325	598	
Unknown	103	92	11	103	
TOTAL	12600	5985	6578	12563	
Interviews after initial mailing		290	271	561	
Conversion rate after initial mailing		4.85%	4.12%	4.47%	

It was assessed that to reach the target of 630 interviews for the South Staffs supply area by the closing date, a reminder would be required. Reminders were email only due

to time constraints and were sent to all those who had not opened the survey link in their original email to avoid the risk of complaints about being over contacted. Responses to this reminder were:

	Interviews wanted		As many as poss
		Assumed %	x
		n=	5503
IMD Decile	Total	email	postal
1	866	866	0
2	1202	1202	0
3	546	546	0
4	486	486	0
5	450	450	0
6	441	441	0
7	410	410	0
8	444	444	0
9	351	351	0
10	263	263	0
Unknown	45	45	0
<b>TOTAL</b>	<b>5503</b>	<b>5503</b>	<b>0</b>
IAs from email Reminder	115	115	
Conversion rate of email reminder	2.09%	2.09%	
<b>Running total (&amp; final) Interviews</b>	<b>676</b>	<b>405</b>	<b>271</b>
<b>Conversion Rate Overall</b>	<b>5.38%</b>	<b>6.77%</b>	<b>4.12%</b>

Included within as the above, ten paper questionnaires were received from South Staffs participants.

## Non-household (NHH) sampling and fieldwork

A target of 100 non-household interviews was set<sup>2</sup>. NHH bill-payers were recruited from a mix of sample sources, and interviewed by a variety of means:

### Commercial panel (online)

Quest Mindshare was used for this component, and a total of 48 interviews were obtained via this method, of which 33 were with South Staffs customers and 15 were with Cambridge customers.

### Purchased business lists (telephone)

Sample of appropriate businesses was purchased from Sample Answers. Participants were contacted by phone and recruited to take part. All participants viewed materials (including the bill graph and key investment area slides) at the time of interview. 23 interviews were achieved via this means, of which 11 were with South Staffs customers and 12 were with Cambridge customers. Sample statistics follow:

<sup>2</sup> The minimum NHH sample size listed in the guidance was 100 for WoCs.

## Cambridge

No. In Sample	Exhausted	Live	Unused	Recruited (inc. Lost)	Interviewed
3094	462	2632	770	16	12

## South Staffs

No. In Sample	Exhausted	Live	Unused	Recruited (inc. Lost)	Interviewed
2466	341	2125	1277	14	11

### **Retailer customer databases (online)**

Wave and Castle agreed to Accent using their customer lists to approach customers by email. 1,243 emails were sent to Cambridge customers, generating 8 interviews, and 4,840 to South Staffs customers, generating 38 interviews.

In total, 117 NHH responses were received of which 82 were for South Staffs and 35 for Cambridge.

Method	SSW	CAM
Panel (NHH)	33	15
Telephone (NHH)	11	12
Retailer (NHH)	38	8

## H2Online

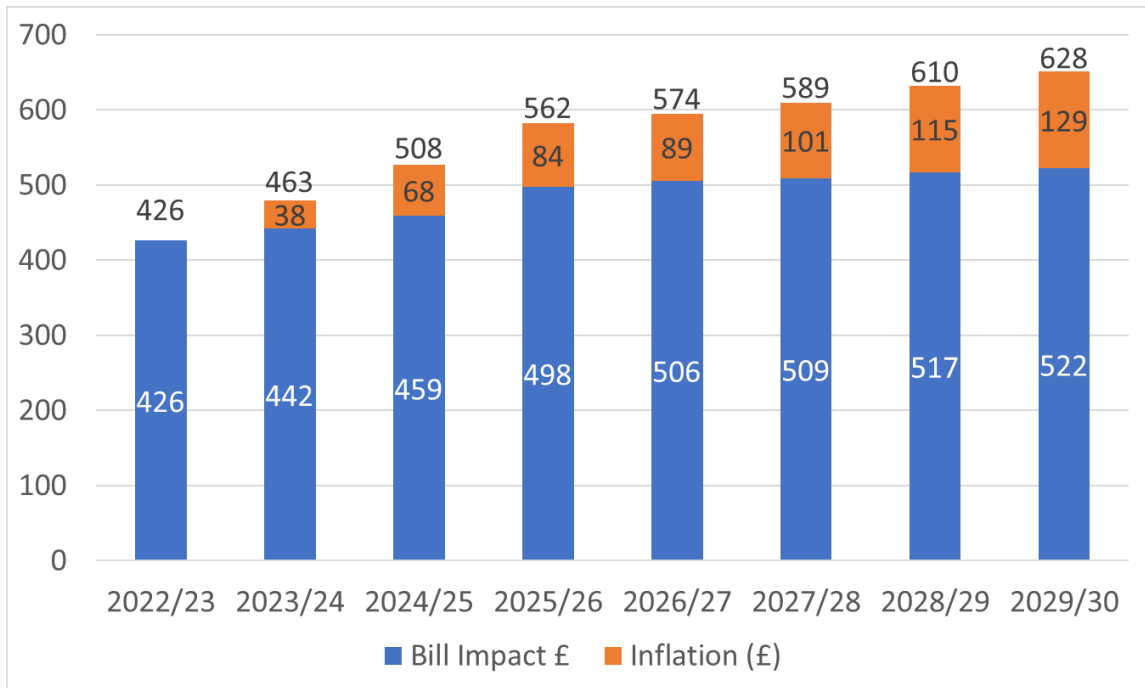
A target of 50 survey responses was set for the separate survey for the H2Online community. South Staffs invited household customers from their existing online communities for South Staffs and Cambridge to respond to the survey through promotion in its weekly members' newsletter. 32 responses were received for South Staffs and 22 for Cambridge.

## Survey

The questionnaire itself was generally tightly prescribed and for the mainstage fieldwork was implemented precisely as mandated.

One exception to this was the bill chart graph where, following cognitive feedback, it was decided that it would benefit comprehension if a total (of bill impact plus inflation) were added above each bar on the graph showing the impact of the plan on bills. This was added with the approval of SSC's ICG Chair. Severn Trent Water's waste water bill impact was provided for South Staffs Water and Anglian Water's waste water bill impact was provided for Cambridge Water by the relevant companies and used in the research.


An example (based on the average bill amount, and showing the actual increases tested):



Additionally, results from the qualitative and quantitative cognitive interviews showed that participants found contextual information on South Staffs/Cambridge Water insightful. Therefore, the decision was taken, with agreement from the ICG, to include introductory slides tailored to region and participant type (household and non-household).

An example slide for a Cambridge household participant is shown below:

### About Cambridge Water



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as two million full baths

Furthermore, within this same section, following the contextual information on South Staffs/Cambridge Water, results from the qualitative and quantitative cognitive interviews showed that participants wanted to see the separation of the combined bill, covering water and waste water services and the single, water-only bill. Participants found it clarifying to know which specific services they were paying for, especially if one bill is much higher than the other.

After the presentation of the business plans and subsequent guidance mandated acceptability and phasing questions, participants were again shown the water only bill impact chart and asked about its affordability.

### 3.5 Fieldwork dates

Household and non-household interviews took place simultaneously. Fieldwork commenced on 14<sup>th</sup> of August 2023 and closed on 11<sup>th</sup> of September 2023.

### 3.6 Data processing

Once fieldwork was completed, the resulting dataset was cleaned to remove poor quality responses (including suspiciously low interview durations (speeders), those clearly choosing the first answer code in all questions even when that meant contradictory responses (straight liners), multiple responses from the same IP address etc).

As mandated by Ofwat, data was checked to ensure that no interview was completed in a time of less than a third of the median interview duration for each method, as a result, 4 interviews were removed.

#### Weighting

SPSS was used to run RIM weighting (Random Iterative Methods, or “Raking”).

HH survey responses were weighted to the following targets (using figures derived from regional level Census data (2021) for age and gender/IMD decile as a proxy for SEG as per the guidance):

#### South Staffs

Age	%
1.00 18-34	18.7%
2.00 35-49	30.1%
3.00 50-64	25.1%
4.00 65+	25.4%
5.00 Prefer not to say	0.6%
<b>Total</b>	<b>100%</b>

Gender	%
1.00 Male	49%
2.00 Female	51%
3.00 Other	0.3%
<b>Total</b>	<b>100%</b>

#### Cambridge

Age	%
1.00 18-34	17.9%
2.00 35-49	30.3%
3.00 50-64	26.6%
4.00 65+	24.5%
5.00 Prefer not to say	0.7%
<b>Total</b>	<b>100%</b>

Gender	%
1.00 Male	49.7%
2.00 Female	49.7%
3.00 Other	0.6%
<b>Total</b>	<b>100%</b>

IMD decile		%
	70134	13.08%
	97326	18.15%
	50263	9.38%
	44724	8.34%
	45583	8.50%
	44691	8.34%
	46088	8.60%
	49935	9.31%
	47353	8.83%
	35443	6.61%
	4548	0.85%
<b>Total</b>		<b>100%</b>

IMD decile		%
	0	0%
	1866	1.45%
	4576	3.55%
	1415	1.10%
	15050	11.69%
	11640	9.04%
	18070	14.03%
	21532	16.72%
	22817	17.72%
	29956	23.26%
	1846	1.43%
<b>Total</b>		<b>100%</b>

Double Weighting Criteria	%
SSW	<b>80.63%</b>

Double Weighting Criteria	%
CAM	<b>19.37%</b>

Triple Weighting Criteria	
Total household consumption	%
245.14	<b>73.99%</b>

Triple Weighting Criteria	
Total household consumption	%
245.14	<b>73.99%</b>

NHH survey responses were weighted to the following targets (using BEIS (2022) data on regional employment size distributions):

### South Staffs

### Cambridge

Size	%
Micro (0~9)	89.08%
Small (10~49)	8.98%
Medium (50 ~249)	1.52%
Large (250+)	0.42%
<b>Total</b>	<b>100%</b>

Size	%
Micro (0~9)	89.97%
Small (10~49)	8.22%
Medium (50 ~249)	1.46%
Large (250+)	0.35%
<b>Total</b>	<b>100%</b>

Triple Weighting Criteria	
Total business consumption	%
86.16	<b>26.01%</b>

Triple Weighting Criteria	
Total business consumption	%
86.16	<b>26.01%</b>



# 4 FINDINGS

## 4.1 Introduction

The following section of this report details the findings of the study. Whilst this report is based on the quantitative findings, it is important to note that there were certainly similarities between the qualitative and quantitative findings affirming certain trends and patterns. However, it is also important to acknowledge that notable differences between the two sets of findings arose primarily due to methodological implications. The qualitative data delved into nuanced intricacies, shedding light on underlying motivations and contextual factors, however due to the smaller sample sizes, it is not possible to significantly compare the two datasets.

## 4.2 Household sample breakdown

1,001 household interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). 567 interviews were generated by an email approach, 421 by post and 13 via paper questionnaires. This is how their profiles fell out (pre-weighting and with weighting). Percentages may not add up to 100 and participants could select ‘prefer not to say’ for certain questions.

Q3. How old are you? Please enter your age.							
	20-24	25-34	35-44	45-54	55-64	65-74	75+
Weighted %	2%	12%	16%	14%	11%	15%	3%
Unweighted %	3%	20%	20%	18%	14%	11%	3%

	Q28. In which of the following ways do you identify?		Q29. Which ONE of the following best describes the occupation of the main income earner in your household?			Q5. Do you have a water meter at your home or your business/organisation?	
	Male	Female	AB	C1C2	DE	Meter	No meter
Weighted %	37%	36%	31%	22%	16%	56%	39%
Unweighted %	45%	42%	40%	27%	17%	50%	44%

	Customer in vulnerable situations CIVS <sup>3</sup>			FV <sup>4</sup>	
	Health vulnerable	Not health-vulnerable	Financially struggling	Not Financially struggling	
Weighted %	26%	44%	33%	64%	
Unweighted %	31%	53%	34%	64%	

<sup>3</sup> Heath vulnerability was calculated using responses to Q32. *Which of the following apply to you?*

<sup>4</sup> Financial vulnerability was calculated using responses to Q9. *Thinking about your finances over the last year, how often, if at all, has your household/organisation struggled to pay at least one of its bills*

### Q32. Which of the following apply to you?

I or another member of my household...	Weighted %	Unweighted %
...disabled or suffer(s) from a debilitating illness	<b>13%</b>	11%
...learning difficulty	<b>4%</b>	4%
...relies on water for medical reasons	<b>5%</b>	4%
...visually impaired	<b>2%</b>	2%
...over the age of 75	<b>6%</b>	5%
...speaks English as a second language	<b>8%</b>	9%
...deaf or hard of hearing	<b>6%</b>	4%
...a new parent	<b>4%</b>	6%
None of these apply to me	<b>59%</b>	59%
Prefer not to say	<b>6%</b>	6%

### Q33. What is your ethnic group? Choose one option that best describes your ethnic group or background

Ethnicity	Weighted %	Unweighted %
English, Welsh, Scottish, Northern Irish or British	<b>75%</b>	73%
Irish	<b>1%</b>	1%
Any other White background	<b>6%</b>	7%
White and Black Caribbean	<b>1%</b>	1%
Indian	<b>5%</b>	5%
Pakistani	<b>2%</b>	2%
Bangladeshi	<b>1%</b>	1%
Chinese	<b>1%</b>	2%
Any other Asian background	<b>1%</b>	2%
Caribbean	<b>1%</b>	1%
African	<b>1%</b>	1%
Arab	<b>1%</b>	1%
Prefer not to say	<b>3%</b>	4%

### 4.3 NHH sample breakdown

122 NHH interviews were conducted. They were split 48 by NHH panel, 23 by CATI, and 51 by email contact with customers of NHH retailers operating in the South Staffs and Cambridge supply areas.

Business customers were profiled based on characteristics of their business.

Q36. How many sites in the UK does your organisation operate from?	Unweighted %	Weighted %
1	61%	85%
2	9%	9%
3	9%	3%
4	5%	1%
5 to 10	6%	0%
11 to 50	3%	1%
51 to 250	3%	0%
250+	3%	0%
Prefer not to say	1%	1%
<b>Weighted base</b>	<b>117</b>	<b>287</b>

Q37. How many employees does your organisation have in the UK?	Unweighted %	Weighted %
0 (sole trader)	10%	21%
1 to 9 employees (micro)	33%	66%
10 to 49 employees (small)	17%	9%
50 to 249 employees (medium)	25%	1%
250+ employees (large)	13%	0%
Prefer not to say	2%	2%
<b>Weighted base</b>	<b>117</b>	<b>287</b>

Q35. How does your organisation mainly use water at its premises? Please select all that apply	Unweighted %	Weighted %
For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)	12%	9%
For the supply of services your organisation provides (eg cleaning services etc)	27%	18%
For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)	11%	3%
For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)	84%	85%
None of the above	1%	1%
Don't Know	1%	2%
<b>Weighted base</b>	<b>117</b>	<b>287</b>

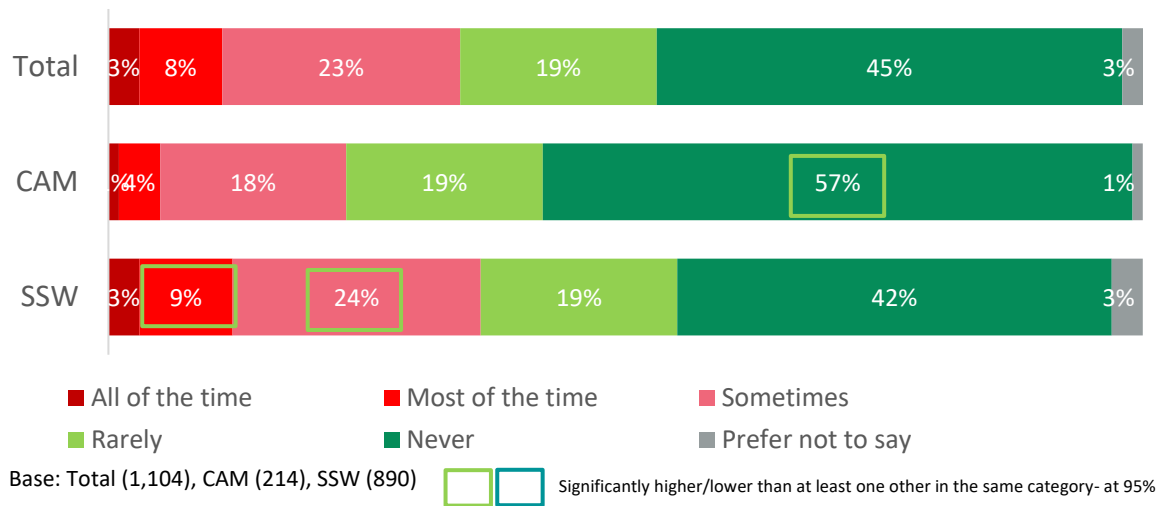
Industry	Unweighted %	Weighted %
Agriculture, forestry and fishing	1%	0%
Energy or water service & supply	3%	2%
Manufacturing	14%	11%
Construction	2%	2%
Wholesale and retail trade (including motor vehicles repair)	9%	11%
Transport and storage	3%	4%
Hotels & catering	10%	11%
IT and Communication	2%	1%
Finance and insurance activities	3%	1%
Real estate activities	7%	11%
Professional, scientific and technical activities	6%	7%
Administrative and Support Service Activities	2%	0%
Public administration and defence	1%	0%
Education	7%	4%
Human health and social work activities	14%	9%
Arts, entertainment and recreation	2%	2%
Other service activities	3%	6%
Other	13%	18%
Prefer not to say	1%	1%
<b>Weighted base</b>	<b>117</b>	<b>287</b>

## 4.4 Financial Temperature Check

### Current financial situation – payment of bills (figure 1)

- 64% of all participants stated that they rarely or never struggle to pay at least one of their bills with 33% struggling to pay at least some of the time.
- Those encountering the greatest challenges appear to be individuals between the ages of 18 and 34, with 67% in the 18-24 age group and 47% in the 25-34 age group expressing struggles, significantly higher than other age groups.
- 45% of households with vulnerable members said they struggle to pay at least sometimes, this is significantly higher than households without vulnerable members (29%).
- 42% of women reported that they struggle at least some of the time to pay their bills, this is significantly higher than men (26%).
- Participants in social grades DE were significantly more likely to struggle to pay their bills (60%) than those in social grades C1C2 (37%) and AB (19%).
- 38% of participants without a meter struggled to pay their bills at least some of the time which is significantly higher than those on a meter (29%).
- Business customers (51%) were significantly more likely to never struggle to pay at least one of their bills compared to household customers (43%)

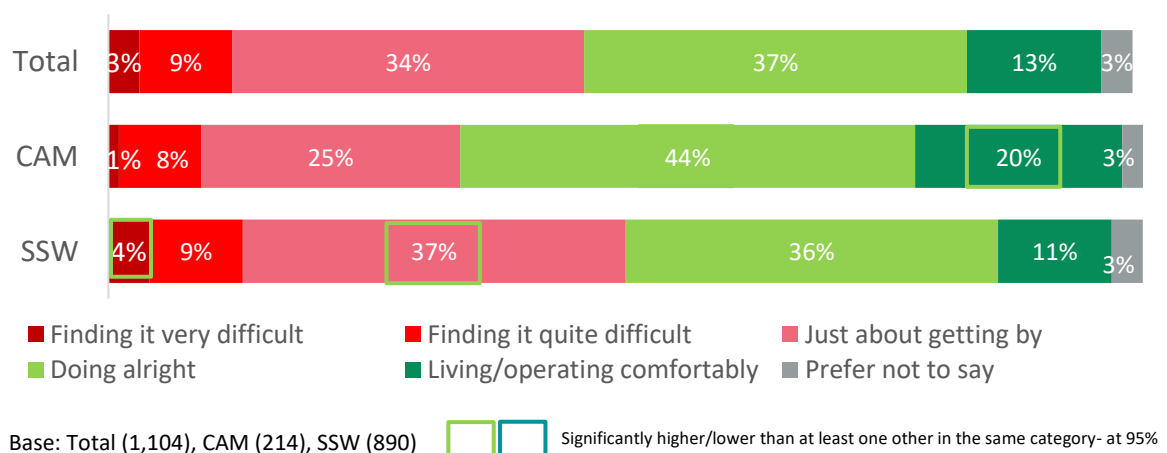
**Figure 1.** Q9 Thinking about your finances over the last year, how often, if at all, has your household/organisation struggled to pay at least one of its bills.



## Current financial situation – overall (figure 2)

- Almost half of participants (46%) are also finding it difficult to manage financially or are just about getting by.
- Participants in the Cambridge region were significantly more likely to say they were doing alright or living comfortably (64%) than those in the South Staffs region (47%).
- 58% of men were significantly more likely to say they were doing alright or living comfortably compared to 42% of women.
- 54% of households without vulnerable members said they were doing alright or living comfortably; this is significantly higher than households with vulnerable members (42%).
- Participants in social grades AB (65%) and C1C2 (47%) were significantly more likely say were doing alright or living comfortably than those in social grade DE (29%).
- 55% of participants on a meter were significantly more likely to say were doing alright or living comfortably than those without a meter (46%).
- There were no significant differences between household and business customers.

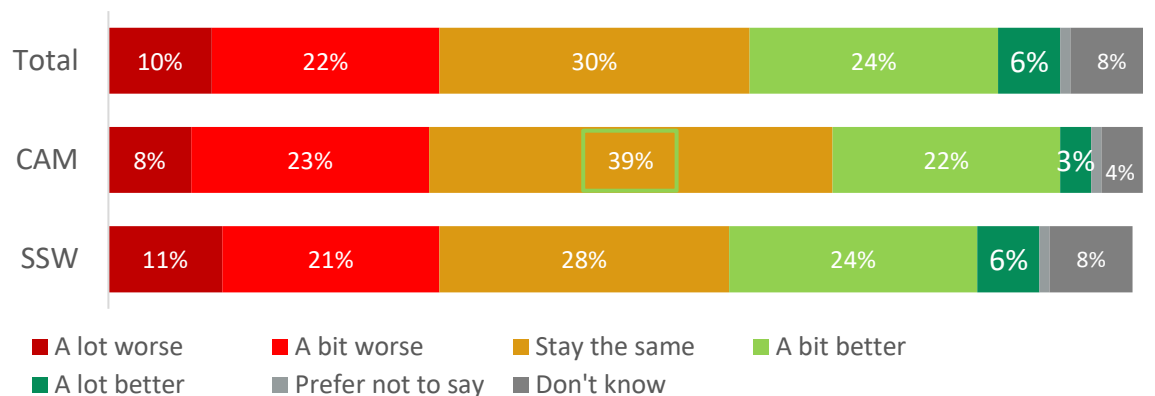
**Figure 2.** Q10 Overall, how well would you/your organisation say you are managing financially now?



## Future financial situation – (figure 3)

- Around 1 in 3 participants feel that their financial situation would worsen (32%), stay the same (30%) or get better (29%) over the next few years.
- The anticipation of positive change diminishes as age increases with individuals in the younger age brackets maintaining a more optimistic outlook, foreseeing an enhancement in their situations. (Overall, 65% for 18-24, 41% for 25-34 and 38% for 35-44, all significantly higher than the 55-64 and 65-75 age brackets with scores of 17% and 6% respectively).
- 37% of household customers feel that their financial situation would worsen compared to 18% of business customers; the difference is significant.

**Figure 3** Q11 Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get?



Base: Total (1,104), CAM (214), SSW (890)     Significantly higher/lower than at least one other in the same category- at 95%

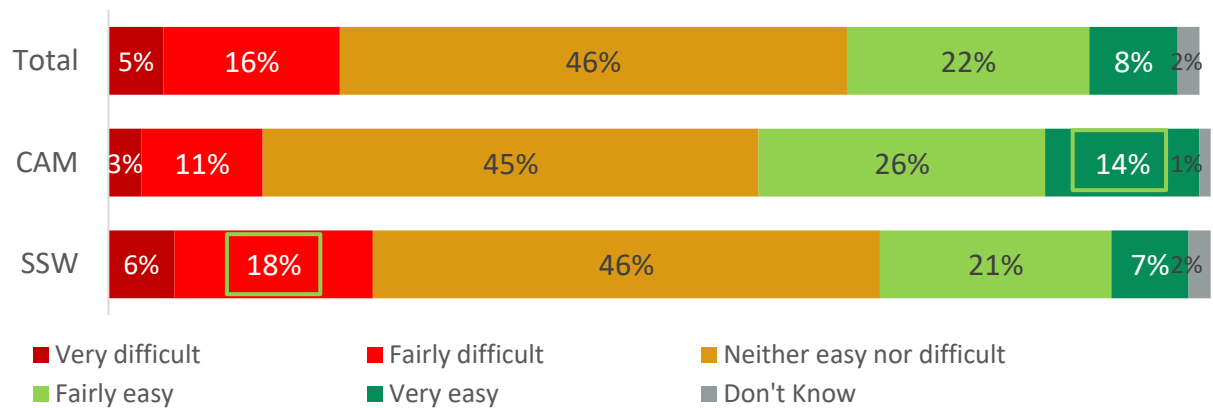
## 4.5 Affordability – combined bill

### Affordability of the current bill – (figure 4)

- When asked about the affordability of the current combined water and waste water bill, less than a third (30%) thought it was easy to pay these bills. This figure is significantly higher in Cambridge (40%) when compared to the South Staffs area (28%).
- Participants who identify as female were significantly more likely to feel that the current bill was difficult to afford (29%) compared to those identifying as male (19%).
- Around a third (32%) of non-vulnerable participants reported that the current bill was easy to afford, significantly higher than vulnerable participants (17%).
- Metered participants were also significantly more likely to say that the bill was easy to afford (35%) compared to non-metered participants (25%).



**Figure 4** Q13. How easy or difficult is it for you/company/organisation to afford to pay your current water and sewerage bill:

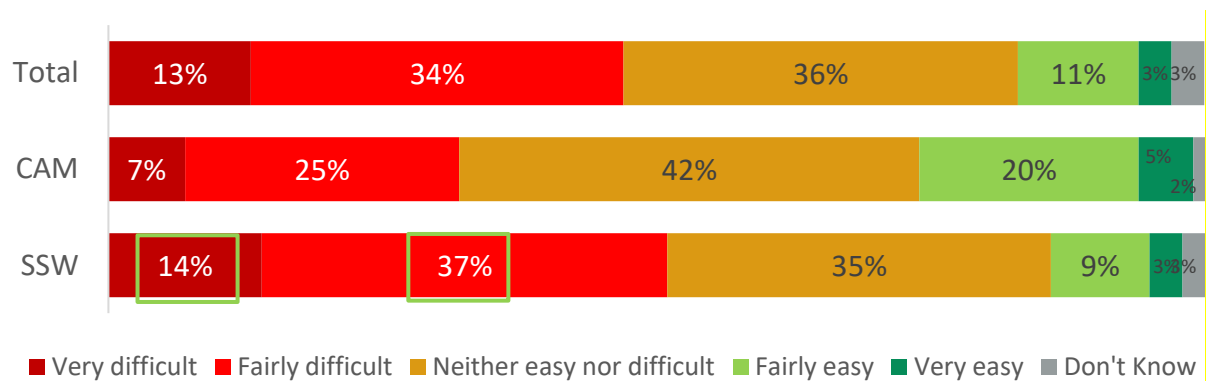


Base: Total (1,104), CAM (214), SSW (890)     Significantly higher/lower than at least one other in the same category- at 95%

### Affordability of the proposed combined bill – (figure 5)

- The proposed combined bill recorded a noticeable decrease in affordability rating, with just 14% of all participants rating it as 'fairly easy' or 'very easy' to afford. Once again, participants from Cambridge exhibited a higher affordability rating (25%) when compared to those in the South Staffs area (11%).
- Nearly half of all participants (47%) expressed concerns about their ability to pay the proposed combined bill, finding it potentially 'very difficult' or 'fairly difficult' to pay. Just over a third (36%) adopted a neutral stance regarding this projected combined bill by selecting 'neither easy nor difficult'.

**Figure 5** Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills?



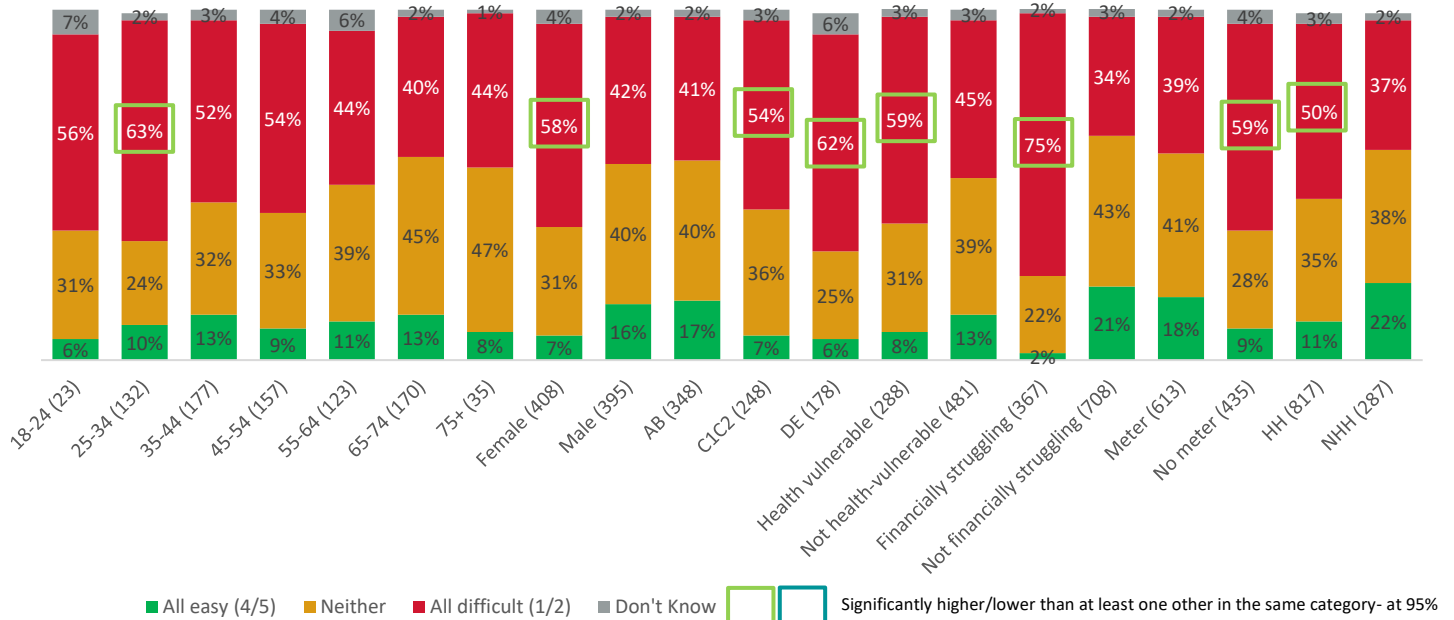
Base: Total (1,104), CAM (214), SSW (890)     Significantly higher/lower than at least one other in the same category- at 95%

### Affordability of the combined bill in subgroups – (figure 6)

- Younger participants, particularly those under the age of 34, indicated a notably greater degree of difficulties in affording the proposed water and sewerage bills. Females, individuals belonging to lower socioeconomic groups, as well as those facing financial and health challenges, were also more inclined to report that paying these bills would be "difficult."

- Furthermore, participants who do not have meters were significantly more inclined to express lower affordability ratings concerning the forthcoming combined bill (59%) compared to metered participants (39%).
- Non-household participants were significantly more likely to report that the combined bill would be easy to pay (22%) than household participants (11%).

**Figure 6** Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills?

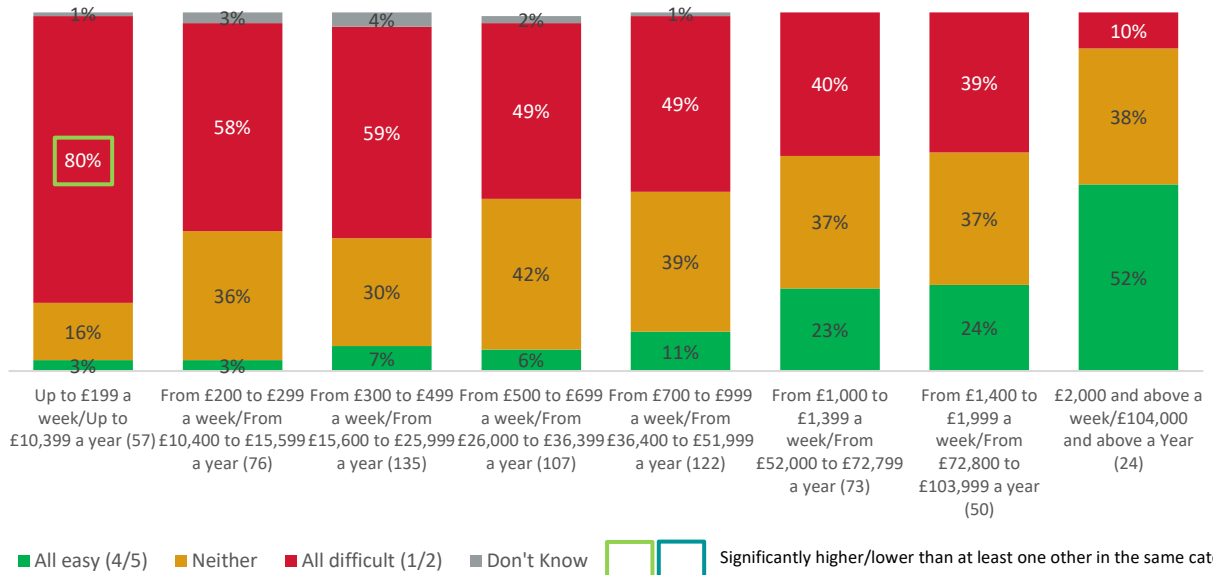


Base: Total (1,104), CAM (214), SSW (890)

### Affordability of the combined bill based on income (HH) – (figure 7)

- Affordability decreases as income declines. Participants on lower income bands reported a significantly higher degree of difficulties when it comes to being able to afford the combined water bills, especially those who earned under £26,000 a year.
- 80% of those in the lowest income band (under £10,399/year) said it would be difficult for them to pay for the projected combined bills while for those who earned over £104,000/year, this number was only 10%.

**Figure 7** Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills?

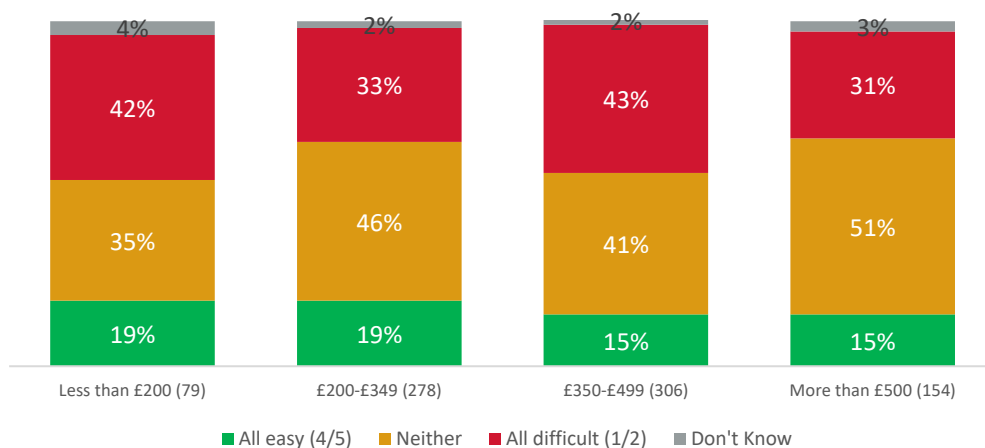


Base: Total HH (817)

## Affordability of the combined bill based on annual bill amount (HH) – (figure 8)

- There were no significant differences between affordability of the combined bill for participants with different bill amounts.
- Participants with a bill size of between £350 and £499 were most likely to struggle to afford the projected combined bill (43%) followed by those with a combined bill of less than £200 (42%).
- Just over half (51%) of participants with a bill amount greater than £500 selected 'neither easy nor difficult'.

**Figure 8** Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills?

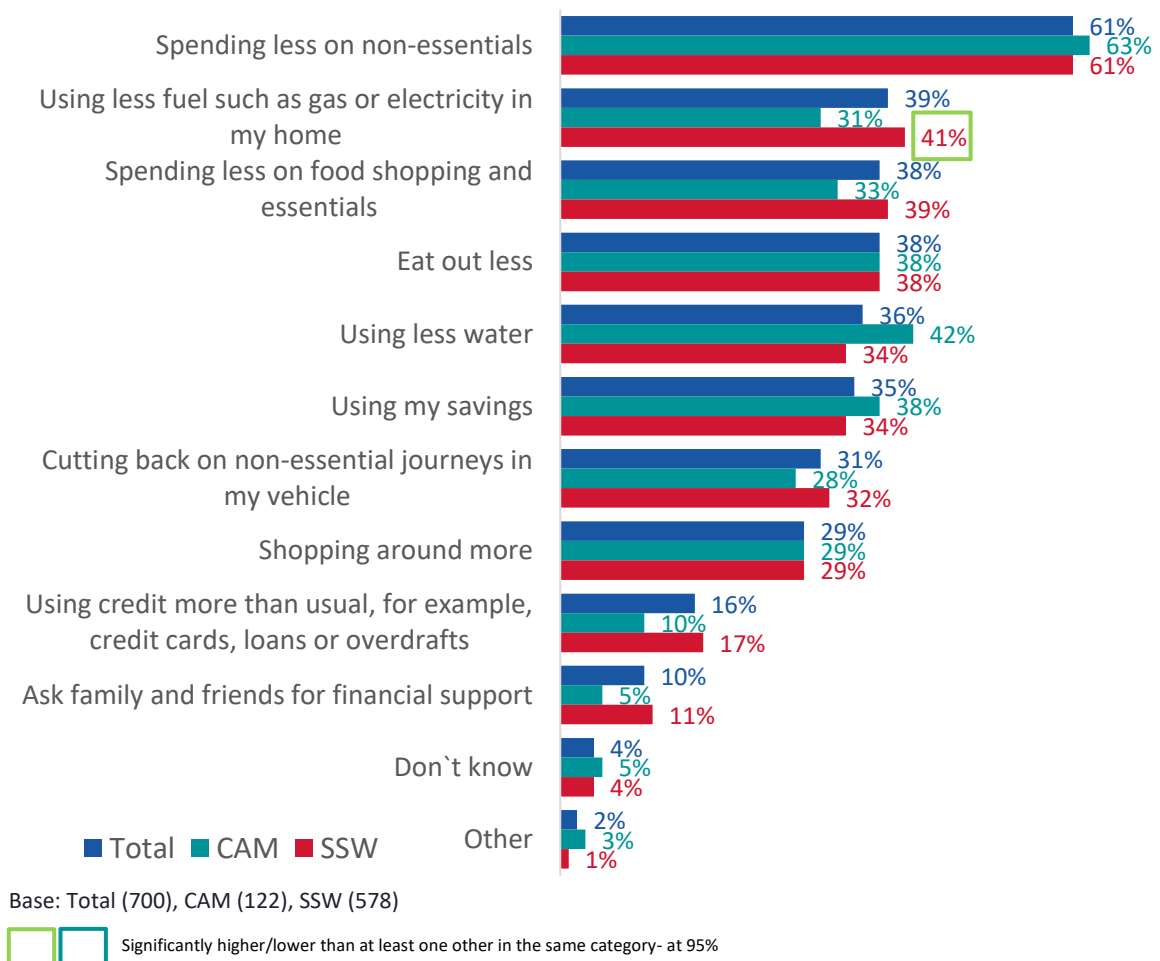


Base: Total HH (817)

## Making changes to pay for increase in combined bill – (figure 9)

- When asked about the changes participants need to make to pay for the increase in their water bills, the majority of participants intended to reduce their expenditures on non-essential items (61%), with the second most common strategy being a reduction in household fuel consumption (39%) and the third spending less on food and essential items (38%).
- Approximately 38% of participants believed they would also need to eat out less.
- The only significant difference between participants from Cambridge and the South Staffs area in their selection was in reducing household fuel which was an option South Staffs participants were significantly more likely to choose (41% for South Staffs vs 31% for Cambridge).
- Aside from 'other' and 'don't know', the least popular option was asking friends and family for financial support with only 10% of participants selecting this option.

**Figure 9** Q15. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

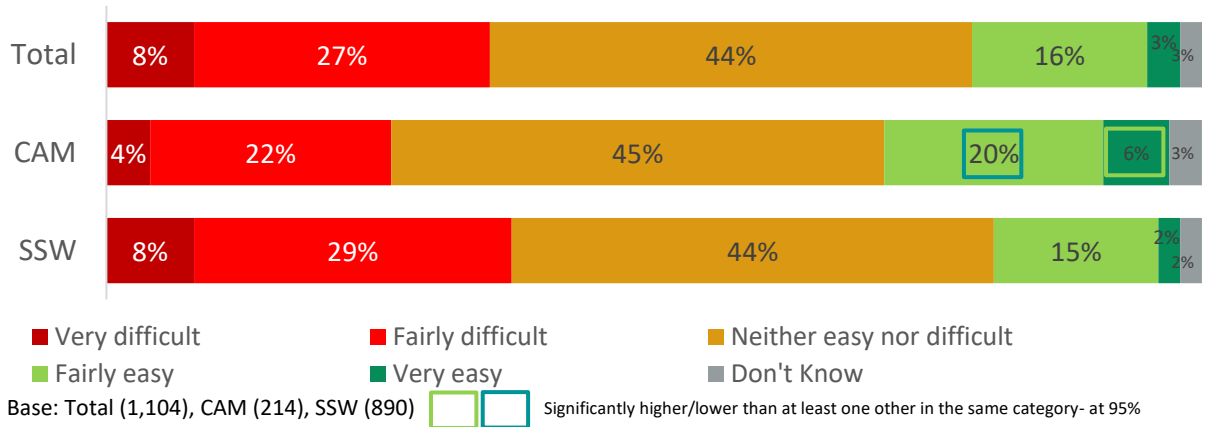


## 4.6 Affordability – water only bill – (figures 10 and 11)

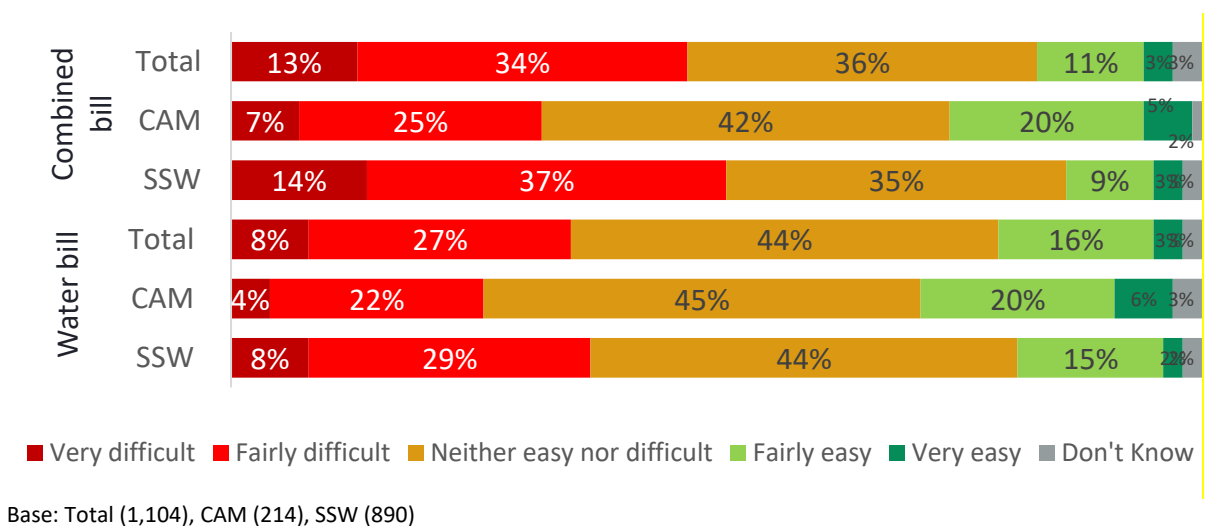
- When shown the water only projected bills, overall affordability increased to 19% (from 14% for the proposed combined bill) and net difficulty to pay decreased to 35% (from 47% for the proposed combined bill).

- Affordability continued to be significantly higher in Cambridge with around a quarter of Cambridge participants (26%) thinking it would be easy to pay for water only bills compared to 17% for South Staffs participants.
- The percentage of participants selecting 'neither easy nor difficult' increased from 36% for the combined bill to 44% for the water only bill.

**Figure 10** Q27a. How easy or difficult do you think it would be for you or your company/organisation to afford these water bills?



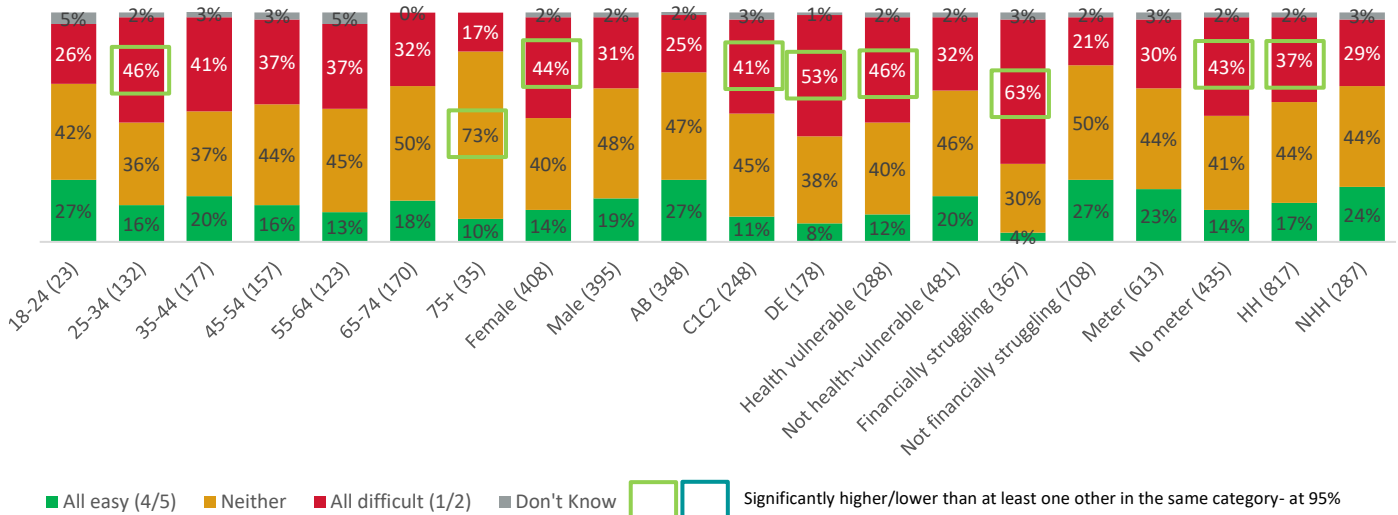
**Figure 11** Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills? / Q27a. How easy or difficult do you think it would be for you or your company/organisation to afford these water bills?



### Affordability - water only bill in subgroups – (figure 12)

- Participants aged 25-34 were significantly more likely to find it difficult to pay for future water only bills. This is also true for females, household participants, participants in lower SEG, those with health issues, those who struggle financially and those without a meter.

**Figure 12 Q27a.** How easy or difficult do you think it would be for you or your company/organisation to afford these water bills?

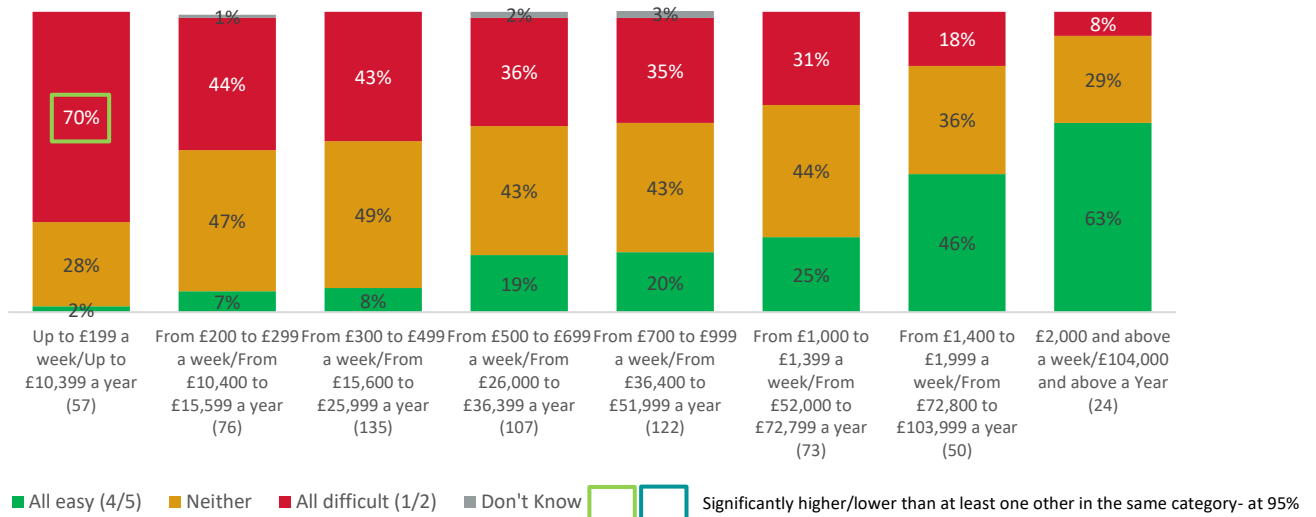


Base: Total (1,104), CAM (214), SSW (890)

### Affordability - water only bill based on income (HH) – (figure 13)

- Affordability for the water only bill in different income groups recorded a similar trend to affordability for the combined bill. As previously observed, there is a greater proportion of customers saying it is more difficult to afford the water-only bill diminishes as income decreases.
- Individuals in lower income brackets experienced notably greater challenges in affording the water only bill, particularly those earning less than £10,399 annually. A striking 70% of those in the lowest income bracket (earning under £10,399 per year) expressed difficulty in affording the projected water-only bill. In contrast, for those in the highest income band, this figure was 8%.

**Figure 13 Q27a.** How easy or difficult do you think it would be for you or your company/organisation to afford these water bills?



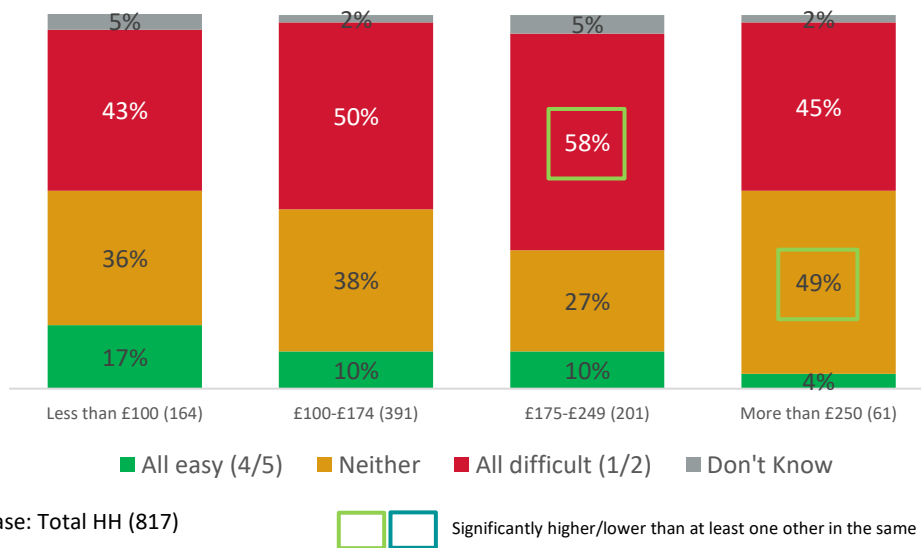
Base: Total HH (817)



## Affordability - water only bill based on annual water bill amount (HH) – (figure 14)

- 58% of participants with a water only bill amount of between £175 and £249 indicated that they would find it challenging to afford the proposed bill, significantly higher than those with bills smaller than £175 or larger than £249.
- Within the £175 to £249 bracket, the following demographics were significantly more likely to find it challenging to afford the proposed bill:
  - Females (60%) vs males (40%)
  - SEG C1C2 (54%) and DE (70%) vs SEG AB (37%)
  - Unmetered (65%) vs metered (36%)
- Participants outside the £175-£249 bill amount bracket had broadly similar scores for struggles with affordability (43% for under £100, 50% for £100-£174 and 45% for greater than £250).
- For participants with a bill amount more than £250, 'neither' was an option chosen significantly more frequently than for bill amounts less than £250 with almost half (49%) selecting this option.

**Figure 14** Q27a. How easy or difficult do you think it would be for you or your company/organisation to afford these water bills?

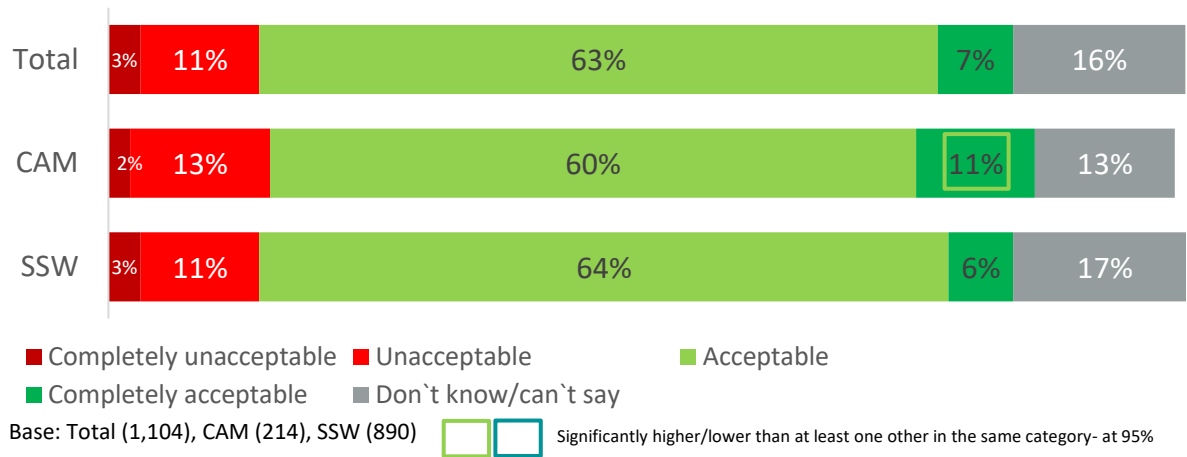


## 4.7 Acceptability – overall – (figure 15)

- Overall, acceptability of SSC's proposed business plan is 70% highlighting a clear majority support for the plan and the associated bills. 63% of all participants thought the plan was 'acceptable', and 7% reported that it was 'completely acceptable'.
- The level of acceptability of the proposed plan was high amongst both Cambridge and South Staffs participants, with 71% and 70% acceptability rates respectively. Cambridge participants were significantly more likely to find the plan 'completely acceptable' (11%) compared to South Staffs participants (6%).
- Participants who found it easy to pay their projected combined bill were significantly more inclined to express a higher level of acceptability (88%) compared to those who struggled to afford the projected bill (60%). The same was true for the projected water only bill, with 87% of participants who found this bill easy to afford choosing

‘acceptable’ or ‘completely acceptable’ but only 56% of participants who considered the water only bill difficult to afford choosing these acceptability options.

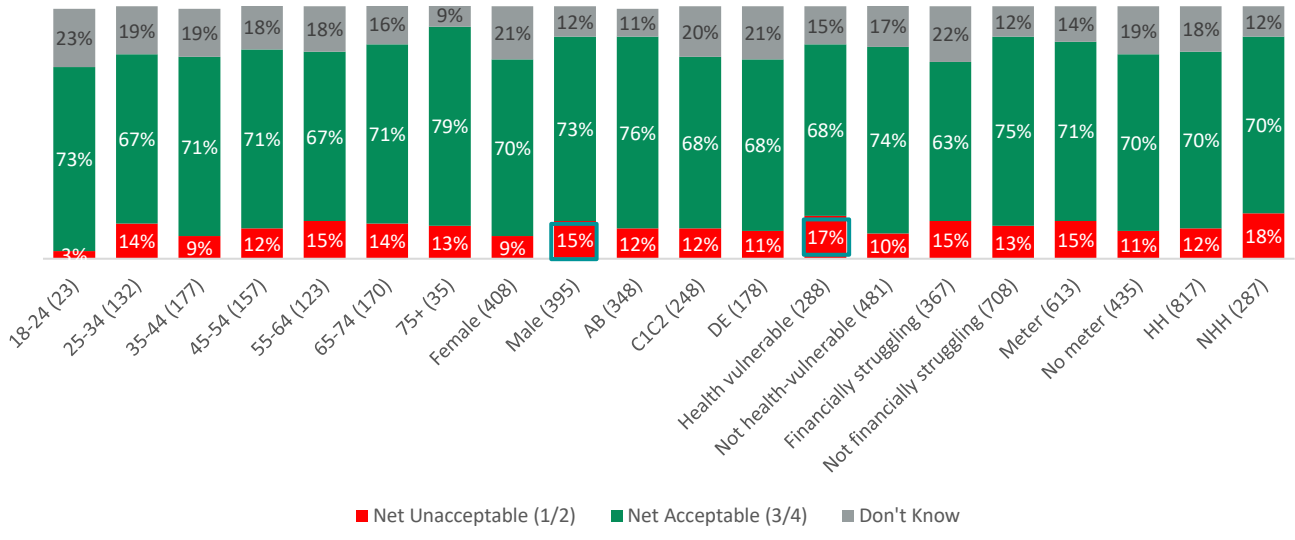
**Figure 15** Q24. Based on everything you have seen and read about Cambridge Water’s / South Staff Water proposed business plan, how acceptable or unacceptable is it to you?



### Acceptability of the proposed bill in subgroups – (figure 16)

- The acceptability question yielded few notable differences in comparison to affordability, except when considering male and vulnerable participants. These two subgroups exhibited a significantly higher likelihood of considering the proposed business plan presented by Cambridge/South Staffs Water to be ‘unacceptable’.
- NHH participants (18%) demonstrated the highest unacceptability score compared to all the variables, though the difference is not significant.
- Household participants as well as those who are lower SEG, female, financially struggling and have no meter were significantly more likely to choose ‘don’t know/can’t say’ when evaluating the acceptability of the proposed business plan.

**Figure 16** Q24. Based on everything you have seen and read about Cambridge Water’s / South Staff Water proposed business plan, how acceptable or unacceptable is it to you?

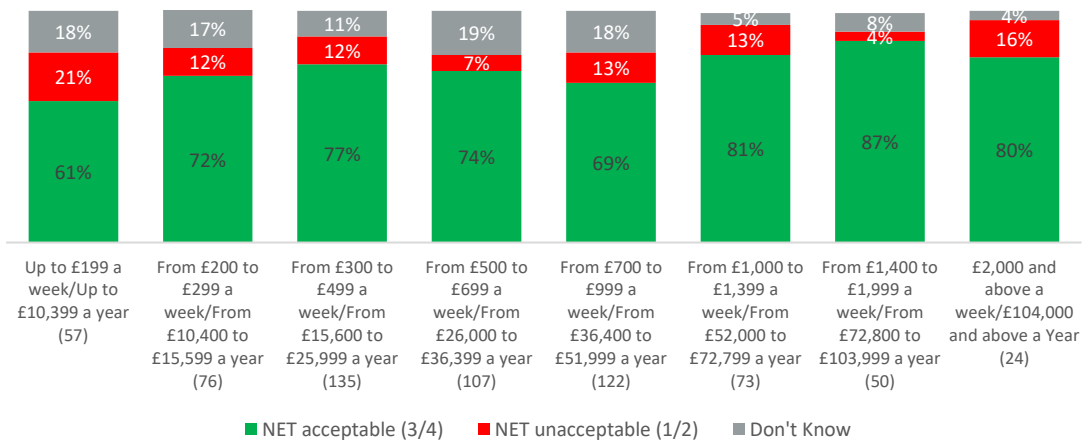


Base: Total (1,104), CAM (214), SSW (890)     Significantly higher/lower than at least one other in the same category- at 95%

## Acceptability of the proposed bill based on income (HH) – (figure 17)

- Acceptability levels generally increased with higher income bands, with the highest level of acceptability (87%) observed in the income band of £72,800 to £103,999/year. The lowest acceptability level (61%) is seen in the lowest income band of up to £10,399/year. While the data suggests that as income increases people tend to find the business plan more acceptable – the differences in acceptability levels between the lowest and highest income band were less noticeable than what we’ve observed in the affordability questions above.

**Figure 17** Q24. Based on everything you have seen and read about Cambridge Water’s / South Staff Water proposed business plan, how acceptable or unacceptable is it to you?



Base: Total HH (817)

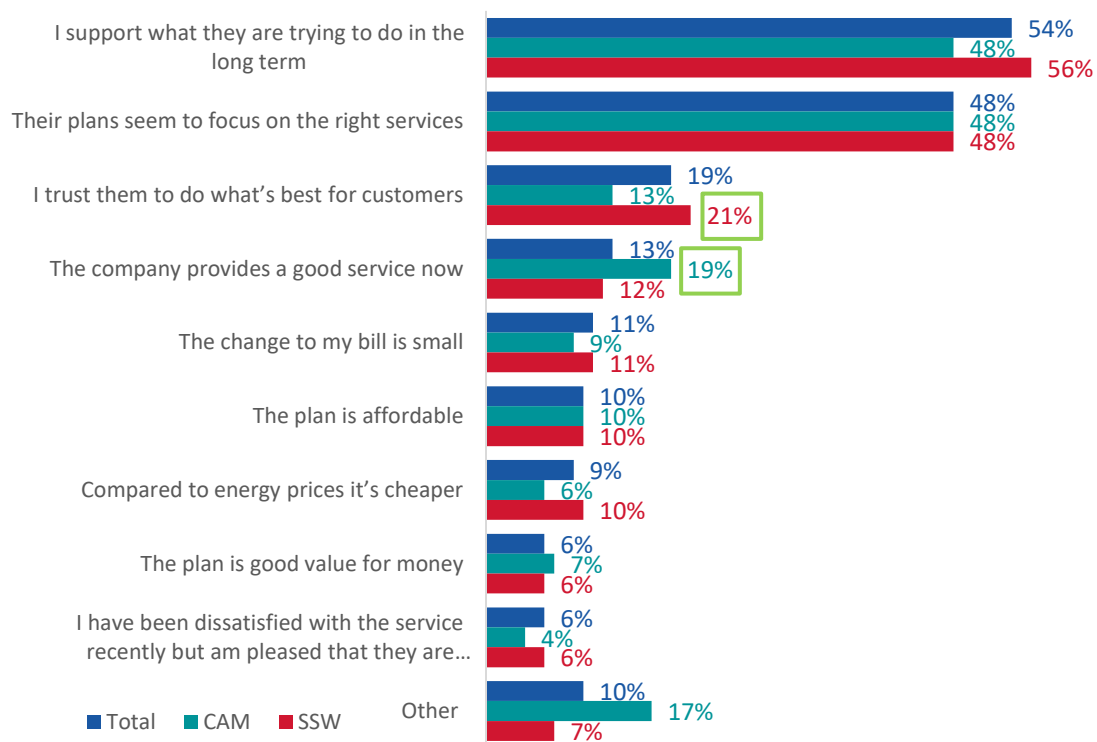
    Significantly higher/lower than at least one other in the same category- at 95%

## Reasons for acceptability – (figure 18)

- Among the 70% of participants who found the proposed plan acceptable, over half (54%) said they support what their water company was trying to do in the long term.

- Little significant difference can be seen between the Cambridge and South Staffs supply areas, apart from two options *'I trust them to do what's best for customers'* and *'the company provides a good service now'*. participants in the South Staffs area were significantly more likely to select *'I trust them to do what's best for customers'* (21% vs 13%), while participants in Cambridge were noticeably more likely to choose *'the company provides a good service now'* (19% vs 12%).
- The least popular reasons given were *'the plan is good value for money'* and *'I have been dissatisfied with the service recently but am pleased that they are making improvements'* which were both selected by 6% of participants.
- 'Other' reasons placed importance on chalk streams being high priority along with sustainability goals, preserving the environment and safeguarding the water supply. Some noted there is not much choice as it is needed for the aging water network.

**Figure 18 Q26.** What are the two main reasons that you feel the proposals for your water supply are acceptable? Please choose up to two answers only



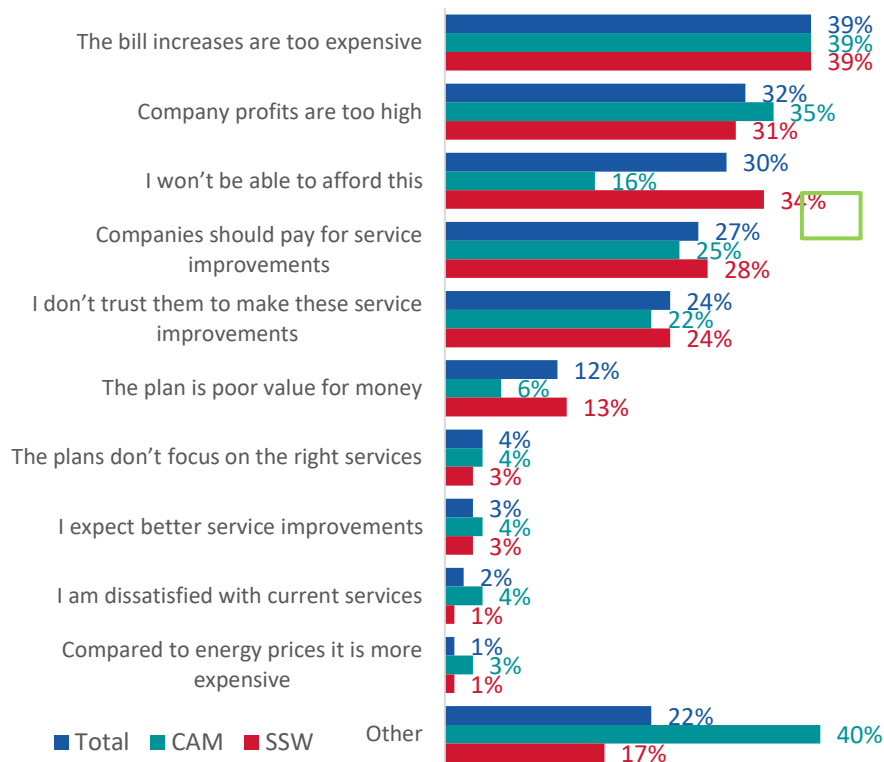
Base: Total (774), CAM (153), SSW (621)     Significantly higher/lower than at least one other in the same category- at 95%

## Reasons for unacceptability – (figure 19)

- For the 14% of participants who found the proposed plan unacceptable, the main reason chosen was *'the bill increases are too expensive'*, with nearly 2 in 5 selecting this option (39%). This was the same in both the Cambridge and South Staffs supply areas. The second most commonly selected option was *'company profits are too high'* (32%).
- In the South Staffs region, significantly more participants said *'I won't be able to afford this'* as their explanation for the plan's unacceptability (34%) when compared to Cambridge (16%).
- There were no other significant differences between the regions aside from the likelihood of choosing *'other'* which was higher for Cambridge participants.

- The least popular option overall was ‘*compared to energy prices it is more expensive*’ which was selected by 1% of participants although for South Staffs participants ‘*I am dissatisfied with current services*’ was equally rarely chosen (1%).

**Figure 19** Q25. What are the two main reasons that you feel the proposals for your water services are unacceptable? Please choose up to two answers only



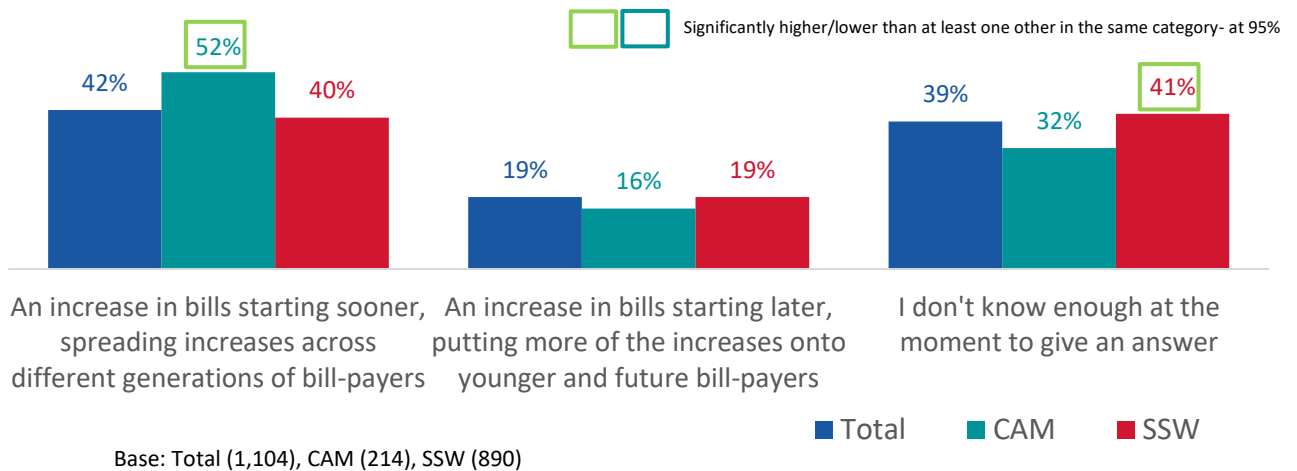
Base: Total (151), CAM (32), SSW (119)

Significantly higher/lower than at least one other in the same category- at 95%

## 4.8 Intergenerational Phasing – (figure 20)

- When asked about intergenerational phasing, over half (52%) of participants in Cambridge selected an increase starting sooner, significantly higher than the figure in South Staffs area (40%).
- Over 2 in 5 (41%) South Staffs participants claimed they did not know enough to make a decision, significantly higher than those in Cambridge (32%).
- Participants who wanted bill increases to start later had similar figures across the regions with 16% for Cambridge participants and 19% for South Staffs participants.

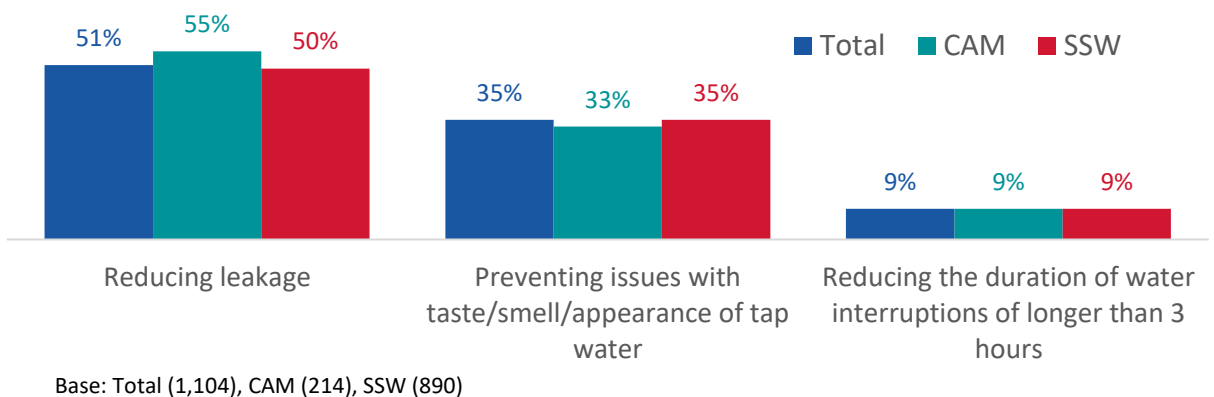
**Figure 20** Q27. Long term investment will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?



## 4.9 Performance commitments – (figure 21)

- After seeing the three performance commitments, just over half (51%) selected reducing leakage as the most important performance commitment, followed by preventing issues with taste, smell and appearance of tap water (35%). No significant statistical differences can be seen between Cambridge and South Staffs supply areas.
- Reducing leakage was significantly more popular for male, AB and C1C2 participants as well as those over 45, those who have a meter and those who do not struggle financially.
- Preventing issues with taste, smell and appearance of tap water was more significant for those who are female, aged 25-44, DE, without a meter and those who struggle financially.
- Reducing the duration of water interruptions was the least popular performance commitment with 9% of participants in Cambridge and South Staffs selecting this option. It was significantly more likely to be chosen by those in financial difficulty and non-household participants.

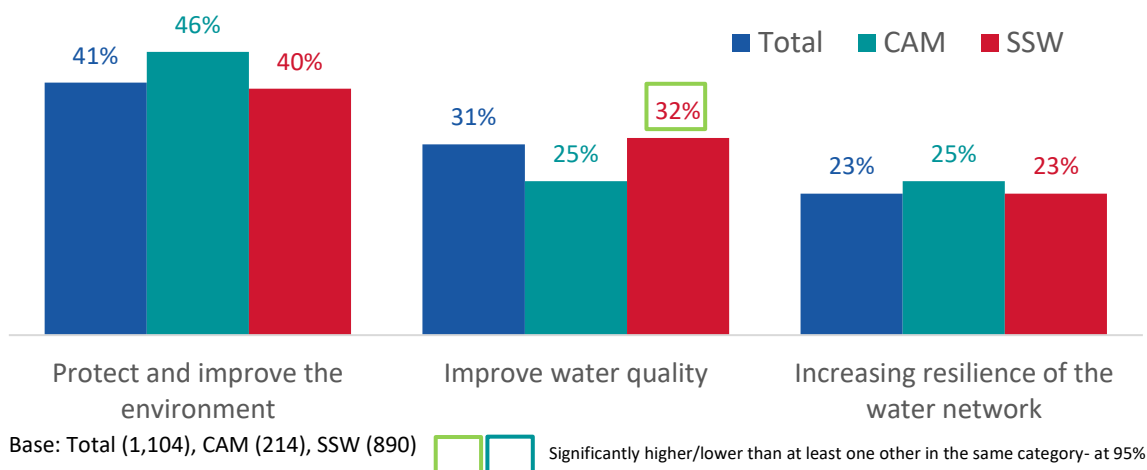
**Figure 21** Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?



## 4.10 Key investment areas – (figure 22)

- The most important investment area was thought to be protecting and improving the environment (41%), followed by improving water quality (31%) with increasing resilience of the water network selected by 23% of participants.
- Participants in the South Staffs supply area put significantly more importance on improving water quality (32%) when compared to those in Cambridge (25%).
- Improving water quality was also significantly more important for participants who were female, those in DE, those without a water meter, those who are vulnerable and who struggle financially.
- Increasing resilience of the water network was statistically more important for those who are over 45, male, AB or C1C2, have a meter and are not vulnerable or struggle financially.
- There were no significant differences to be observed in terms of protecting and improving the environment.

**Figure 22** Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you?



## 4.11 Water related attitudes

Participants were asked a randomised set of eleven statements about water-related attitudes to which they rated their agreement on a scale of 1 to 10, 1 being strongly disagree and 10 strongly agree. These questions focused on three main topics:

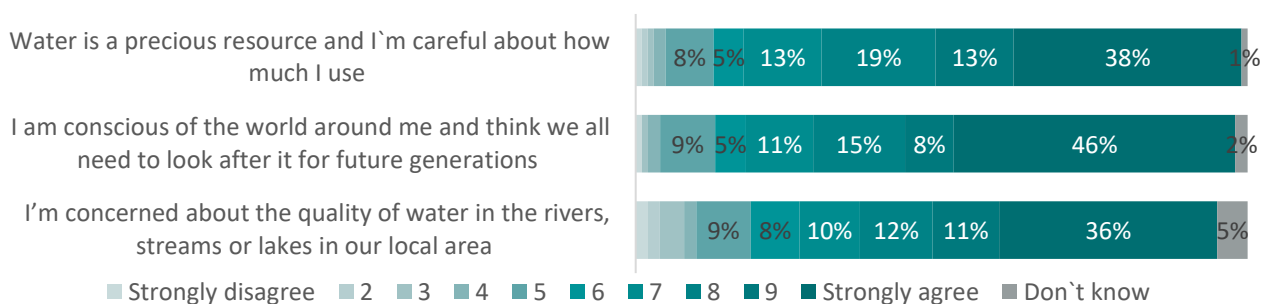
- water environment
- perceptions about their water company; and
- customer behaviour.

Data in the summary below uses the top 3 boxes (scores 8, 9 and 10).

## Water environment – (figure 23)

- Overall, 70% agreed that water is a precious resource, and they were careful about how much they used (top 3 boxes). Nearly the same proportion cited that they were conscious about the world and the need to look after it for future generations (69%). About 3 in 5 (59%) expressed concerns about the quality of water in rivers, streams or lakes in their local area.
- Those who found the business plan unacceptable were most likely to agree that water is a precious resource and that they were concerned with the quality of water in rivers, streams or lakes.
- Overall, those who agreed with these statements placed importance on protecting and improving the environment and reducing leakage in the business plan:
  - Participants that were conscious about the world and the need to look after it for future generations were significantly more likely to place importance on the following performance commitments: protect and improve the environment (57%) and reducing leakage (51%).

**Figure 23** Q27c.How strongly do you agree/disagree with the following:



Base: Total (1,104)

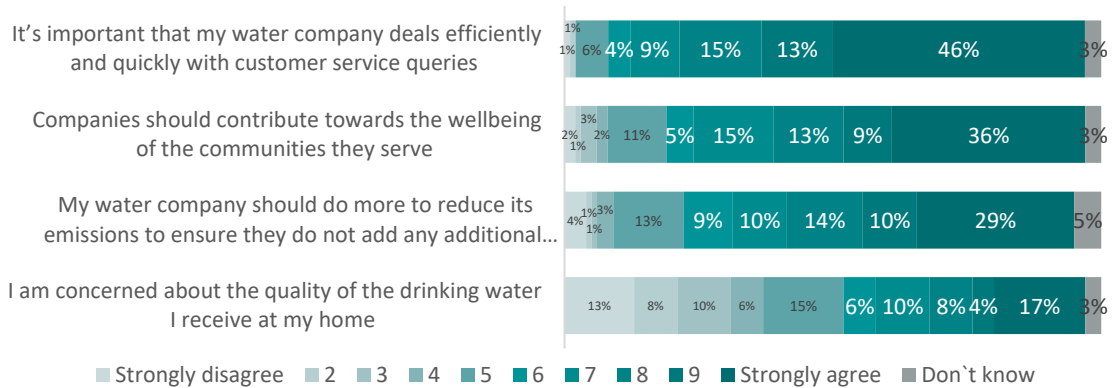
## Perceptions about their water company – (figure 24)

- The majority of participants agreed that it was important for their water company to deal with customer service queries effectively and quickly (74%).
- Less than a third (29%) agreed that they were concerned about the quality of drinking water at their home.
- Participants who found it very difficult to manage financially were most likely to strongly agree that their water company should be contributing to the wellbeing of communities and dealing efficiently with customer queries.
- Participants who reported that the combined and water only bills would be unaffordable were significantly more likely to indicate concern with the quality of drinking water at their homes than those who could easily afford these bills.
- When compared to the performance commitments, participants that agreed that it was important for their water company to deal with customer service queries effectively and quickly placed significantly higher importance on increasing resilience of the water network (83%).
- Participants who agreed that their water company should be contributing to the wellbeing of communities and should do more to reduce its emissions placed significantly higher importance on protecting and improving the environment.



- Those who were concerned about the quality of drinking water they receive at home placed significantly higher importance on improving water quality (43%) and preventing issues with taste, smell and the appearance of tap water (39%).

**Figure 24** Q27b. How strongly do you agree/disagree with the following:

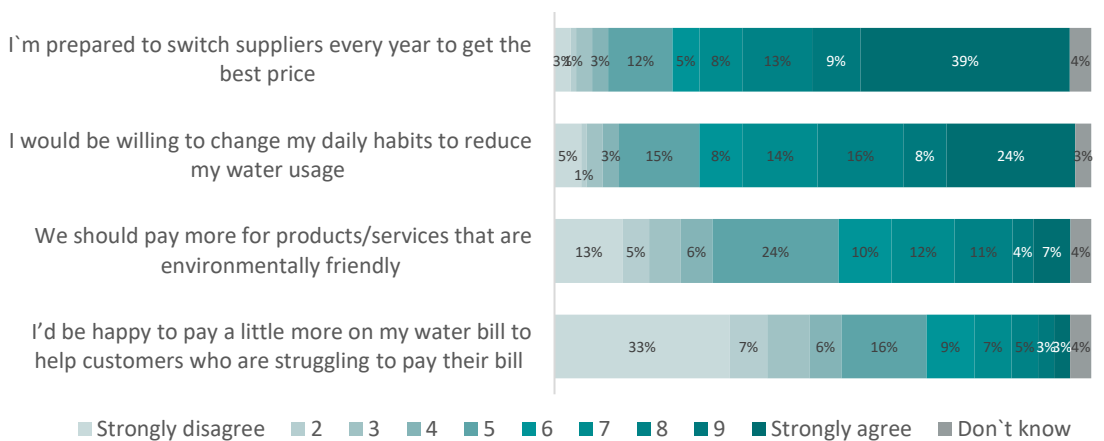


Base: Total (1,104)

### Customer behaviour – (figure 23)

- Customer behaviour was explored in a number of areas:
  - switching utility providers
  - habit change
  - trade-offs for environmentally friendly products; and
  - helping other consumers.
- The majority of participants agreed that they would switch suppliers every year to get the best price (61%), and nearly half would change their daily habits to save water (48%).
- Overall, only 22% would pay more for products that are environmentally friendly, and even less (11%) would pay more to help financially struggling consumers.
- Participants who found it fairly or very easy to afford the projected combined and water only bills were more likely to agree to pay more for environmentally friendly products and to help those struggling with their water bills.

**Figure 25** Q27b. How strongly do you agree/disagree with the following:

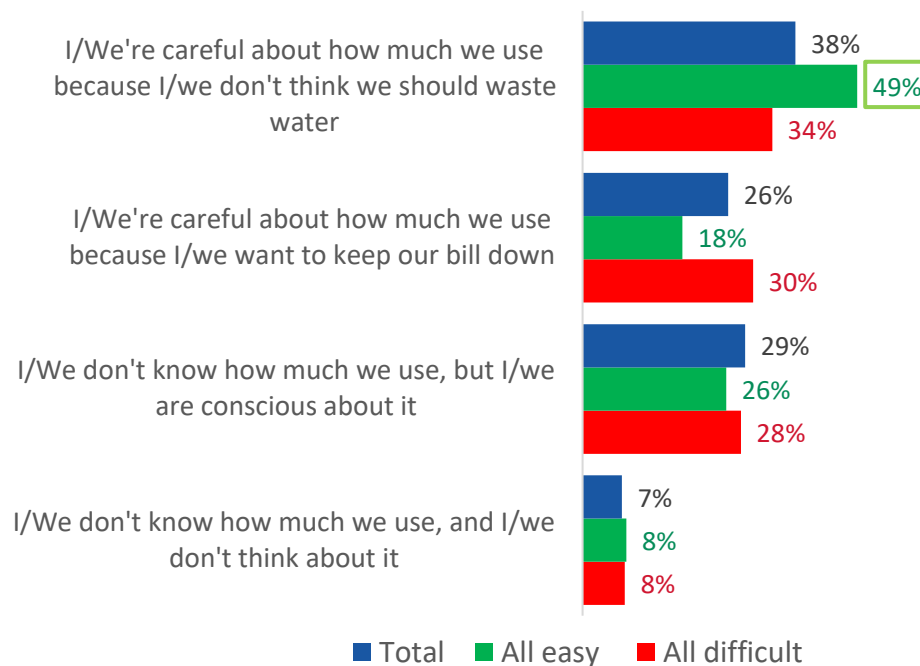


Base: Total (1,104)



## Water usage behaviour by affordability and acceptability – (figures 26 and 27)

- Almost two-fifths of participants (38%) reported that they are careful with the water they use as they do not think we should waste water with just over a quarter (26%) careful as they want to keep their bill down.
- Participants who struggle to pay bills most or all of the time had a significantly greater likelihood of saying they are careful about how much they use as they want to keep their bill down.
- Participants who found the plan 'acceptable' were statistically more likely to say that they do not know how much water they use but they are conscious about it.

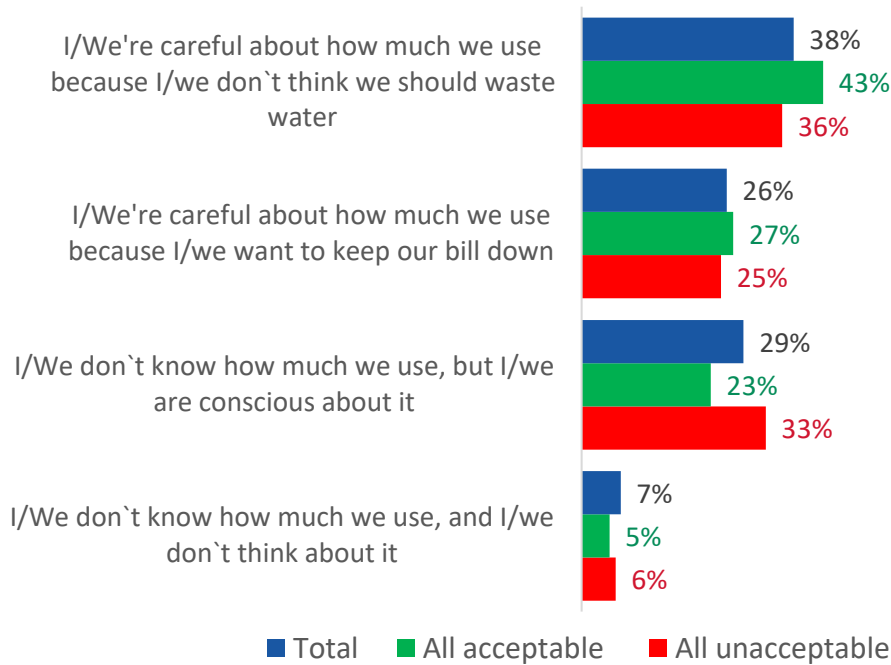
**Figure 26** Q27d. Which one of the following statements most closely applies to your use of water in your household?



Base: Total HH (817)

  Significantly higher/lower than at least one other in the same category- at 95%

**Figure 27** Q27d. Which one of the following statements most closely applies to your use of water in your household?

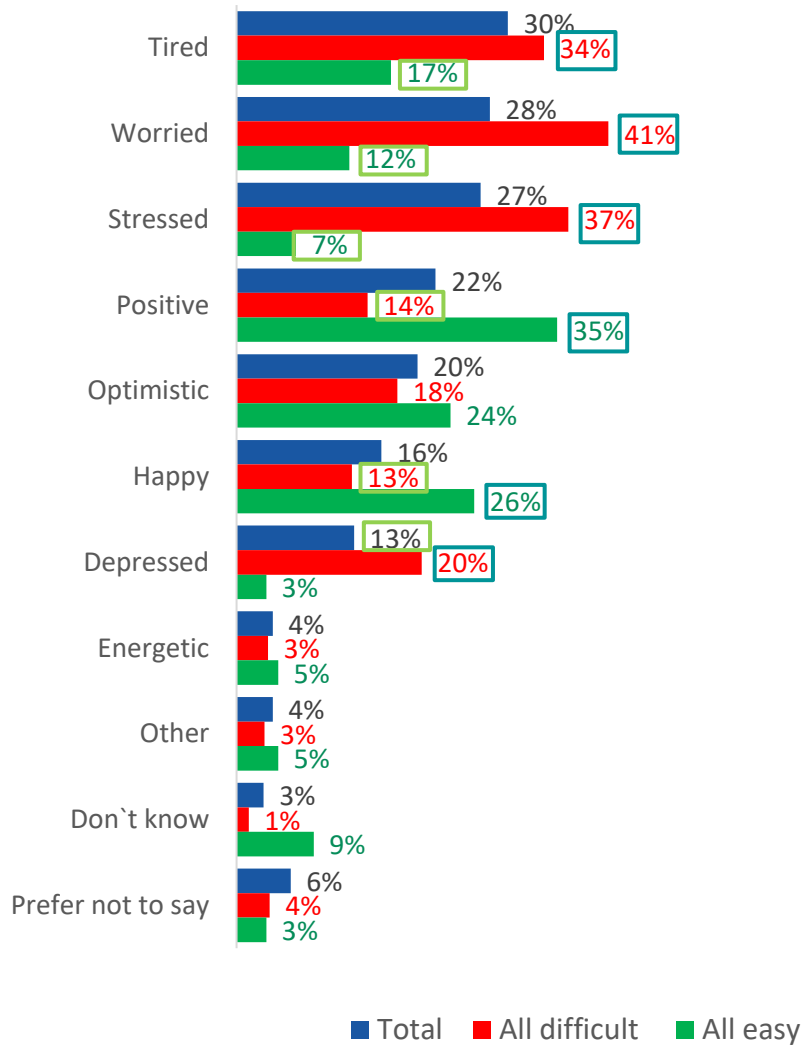


Base: Total HH (817)

### Participant emotions by affordability and acceptability - (figures 28 and 29)

- Almost a third (30%) of participants reported that they were tired, the most commonly chosen emotion, followed by worried (28%) and stressed (27%).
- Participants who indicated that it would be difficult to afford the combined and water only bills were significantly more likely to be stressed, depressed and worried.
- Similarly, participants who labelled the plan 'completely unacceptable' had a greater statistical likelihood of being depressed and stressed.
- Conversely, participants who felt the business plan was 'completely acceptable' were significantly more likely than those who felt it was unacceptable to be optimistic and positive.

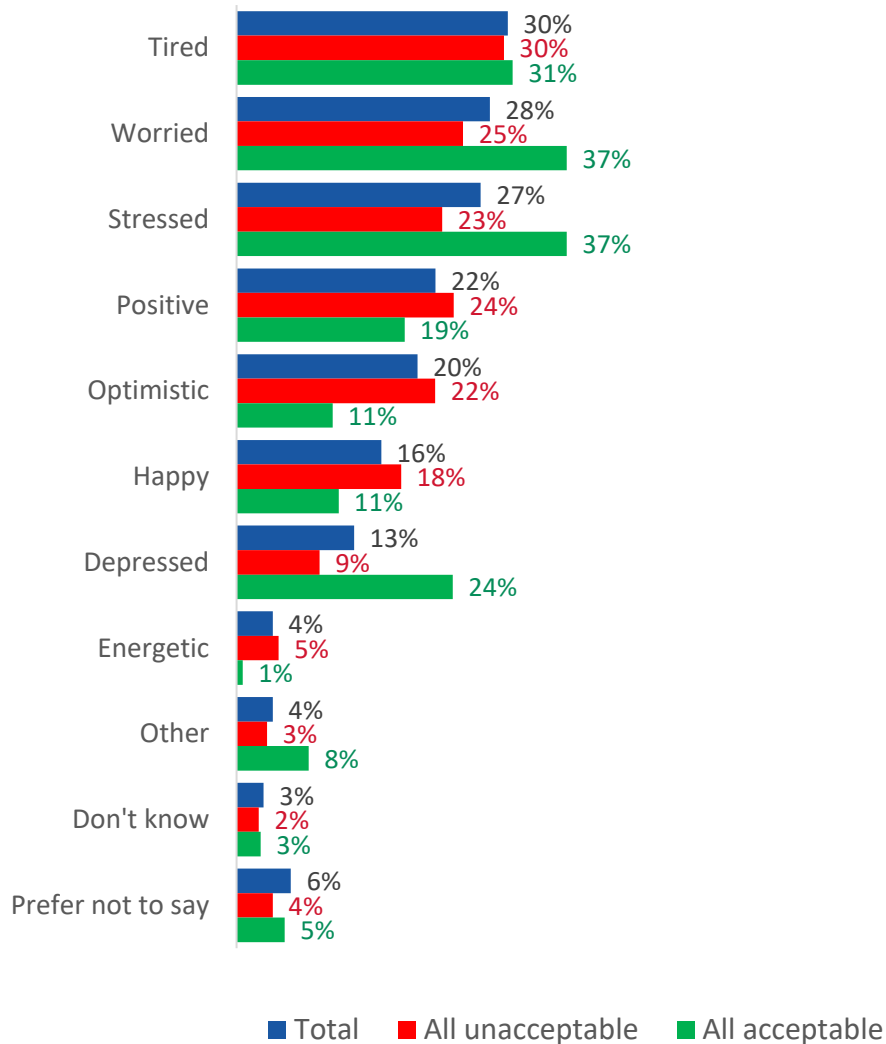
**Figure 28** Q27e. Which of the following emotions best describe how you're feeling towards day-to-day life at the moment?



Base: Total HH (817)

Significantly higher/lower than at least one other in the same category- at 95%

**Figure 29** Q27e. Which of the following emotions best describe how you're feeling towards day-to-day life at the moment?



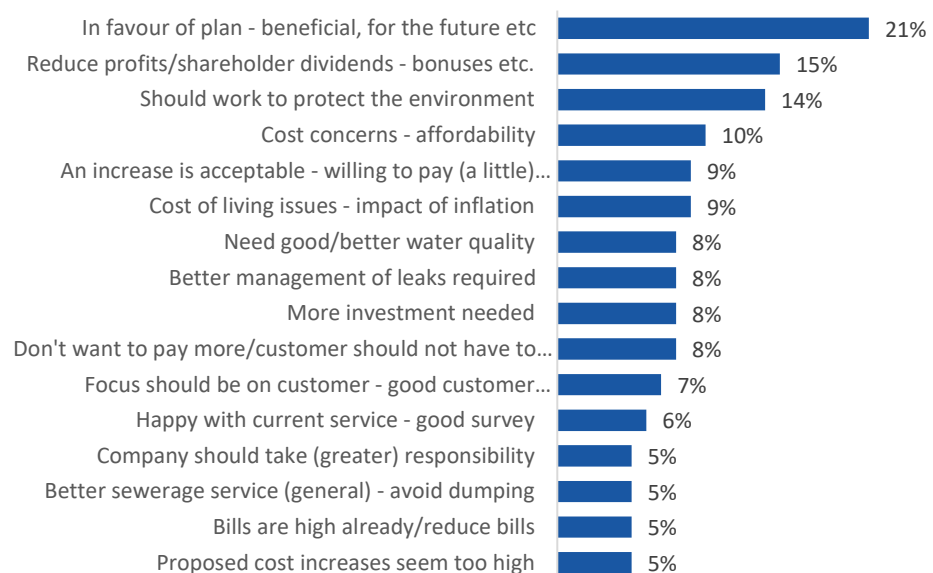
Base: Total HH (817)

## 4.12 Further thoughts – what participants say about the business plan – (figure 30)

- Just over a fifth of participants (21%) commented that they were in favour of the plan because it was beneficial for the future. Other positive comments included the following themes: acceptability of the increase (9%) and happiness with current service (6%).
- Many of the concerns expressed were financial with the most common being worries about affordability (10%). Other financial concerns included cost of living and inflation (9%), the existing cost of bills being too high (5%) as well as the proposed cost increases (5%).
- Some participants put forward thoughts on the topics of management and responsibility such as the suggestion that profits and shareholder dividends should be reduced (15%), that customers should not have to pay (8%) and that companies should take greater responsibility (5%).

- Comments from participants also focused on investment with either general calls for investment (8%) and upgrading of infrastructure (3%) or investment in specific areas such as managing leaks and water quality (8%) or protecting the environment (14%).
- 7% of participants mentioned that the focus should be on the customer with good customer service and support. On a similar theme, 4% of participants noted that they were unhappy with their current services.
- Comments did not solely relate to the clean water services provided by South Staffs/Cambridge Water as 5% of participants suggested that there should be better sewerage services.

**Figure 30 Q27f.** Based on what you have read about Cambridge/South Staffs Water’s plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?



Base: Total HH (817)

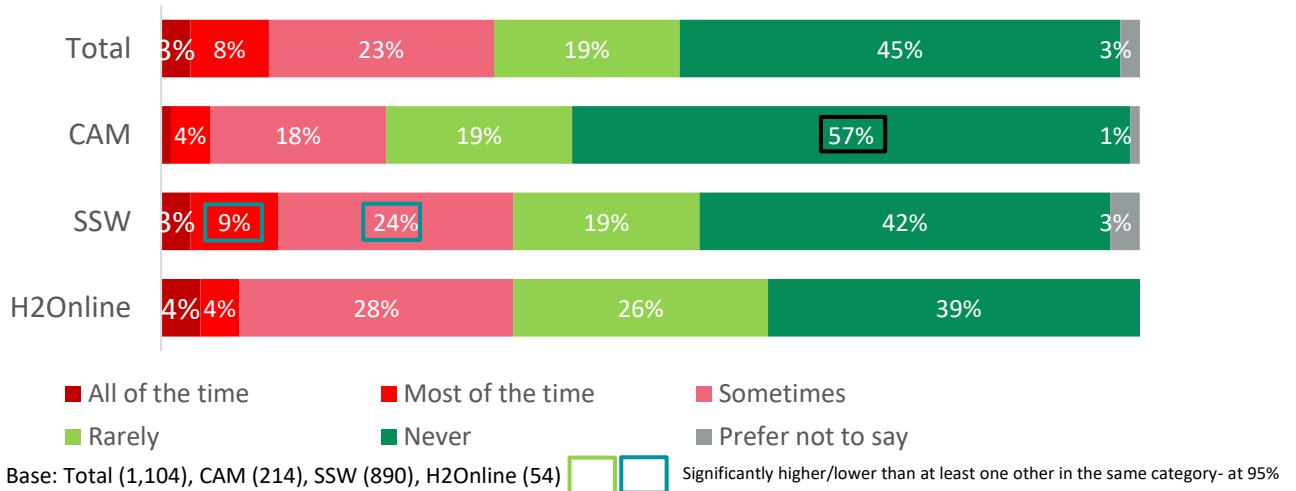
## 4.13 H2Online community – household survey findings

The H2Online sample is more informed and engaged than participants of the questionnaire and as the sample is conducted online, it is self-selecting by nature. Among the H2Online sample, a similar set of questions were asked. For full details of the H2Online questionnaire see Appendix E. Overall, the results were in line with the main survey, however the data needs to be interpreted with caution as the base size was relatively small and due to the small base size, the South Staffs/Cambridge Water sample was merged for reporting purposes.

### Financial temperature check – (figures 31 to 33)

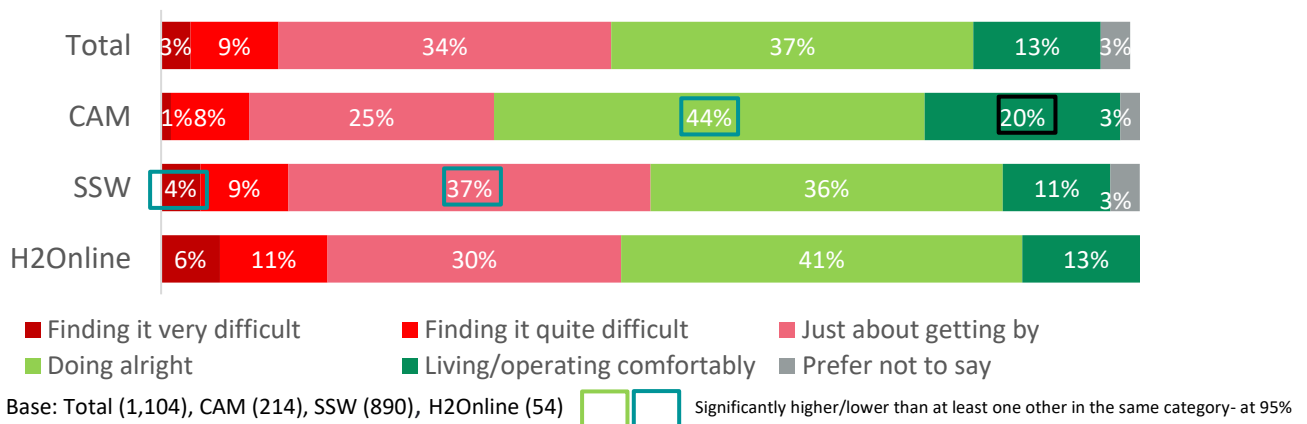
- Participants reported varying degrees of struggles to pay bills over the past year, with 39% stating that they never struggled while 8% struggled most or all of the time.

**Figure 31 Q9:** Thinking about your finances over the last year, how often, if at all, has your household struggled to pay at least one of its bills?



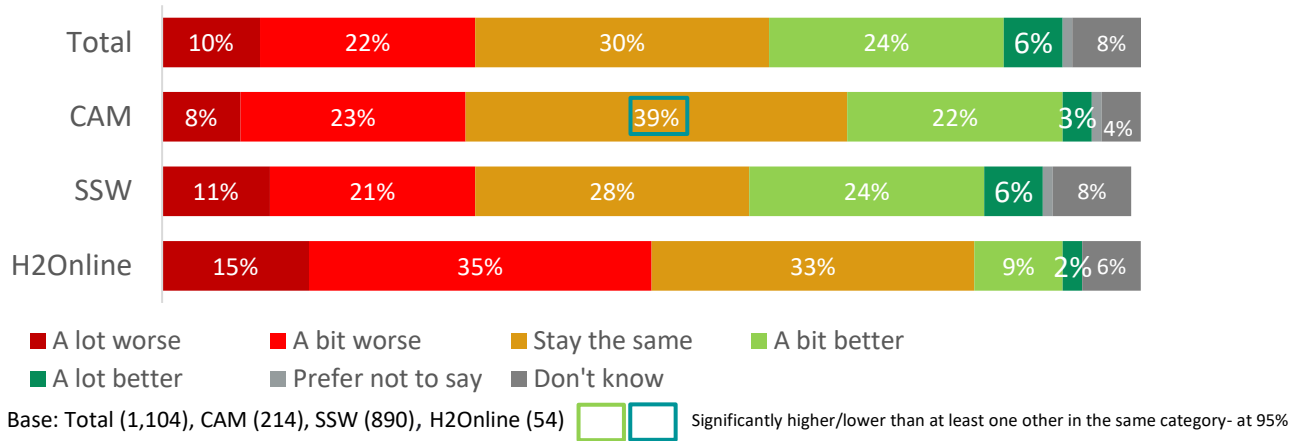
■ Regarding current financial management, the majority report that they are ‘doing alright’ (41%) or ‘just about getting by’ (30%). Just 13% of H2Online participants feel that they are living comfortably.

**Figure 32** Q10. Overall, how well would you say you are/your organisation is managing financially now?



■ Looking ahead to 2030, half of H2Online participants expect their household's financial situation to get worse (a bit or a lot) with only 11% expecting it to improve.

**Figure 33** Q11. Thinking about your household’s/organisation’s financial situation over the next few years up to 2030, do you expect it to get:



## Affordability

More H2Online members find it relatively easy to pay their current combined water bill, with 42% rating it as 'easy'. However, there is a notable increase in perceived difficulty when it comes to the proposed combined bill, with only 19% considering it easy to afford. The proposed water-only bill falls in between with 24% rating it as easy to afford.

On the other hand, for ratings indicating difficulty to afford their water bill, only 17% of H2Online participants find the current bill difficult to pay. However, this percentage substantially increases to 37% for the proposed combined bill. The proposed water-only bill also poses some difficulty, with 18% finding it difficult to pay.

By comparison, for the combined bill, non-H2Online participants had a lower affordability score of 14% and a higher difficulty score of 47%. It was a similar story for the water only bill with 19% of non-H2Online members finding this easy to afford and 35% finding it difficult.

	Net easy	Net difficult
Current combined bill	42%	17%
Proposed combined bill	19%	37%
Proposed water only bill	24%	18%

Base: H2Online (54)

	Net easy	Net difficult
Current combined bill	30%	21%
Proposed combined bill	14%	47%
Proposed water only bill	19%	35%

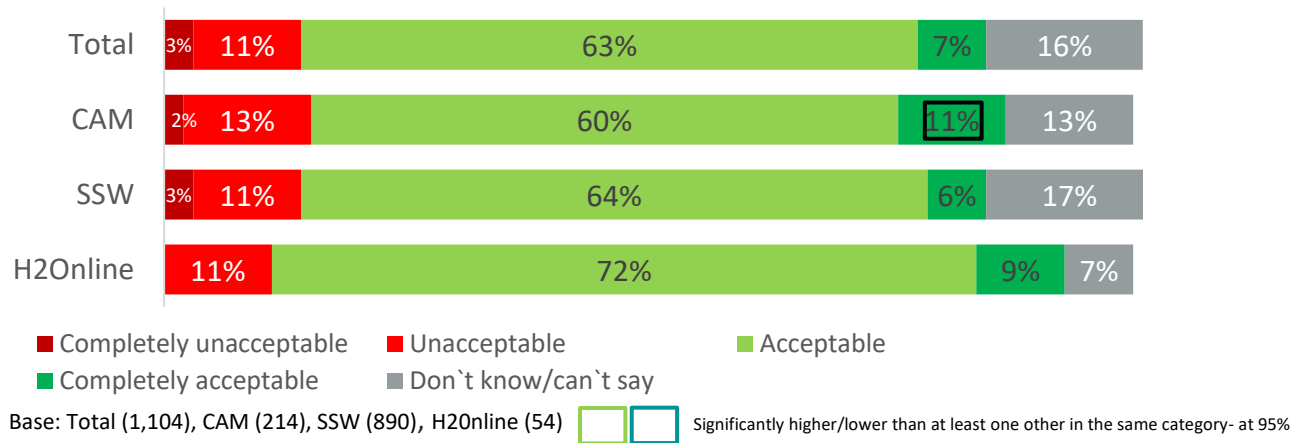
Base: Total (1,104), CAM (214), SSW (890)



## Acceptability – (figure 34)

81% of the H2Online participants surveyed found the proposed plan ‘acceptable’ or ‘completely acceptable’ – this is higher than acceptability levels of the main survey (70%). No H2Online participants felt the plan was ‘completely unacceptable’.

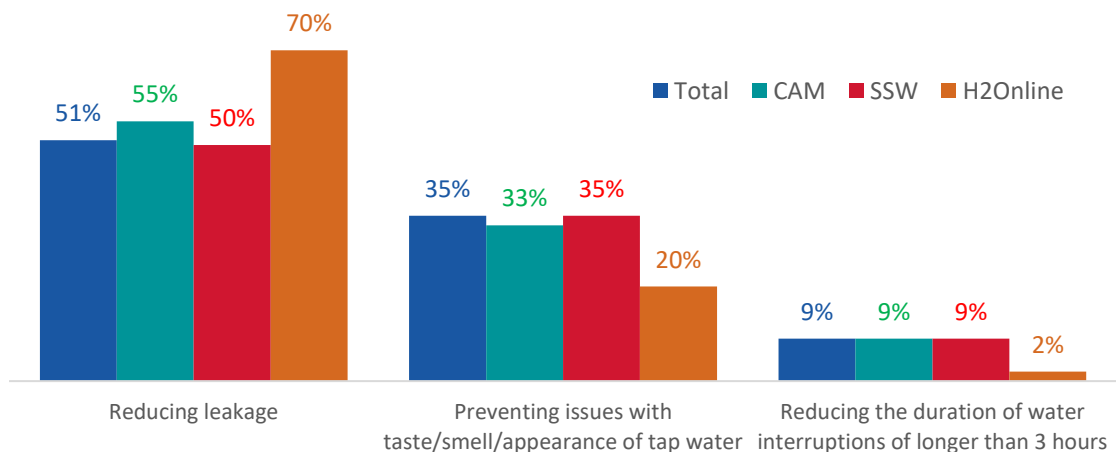
**Figure 34** Q24. Based on everything you have seen and read about Cambridge/South Staffs Water’s proposed business plan, how acceptable or unacceptable is it to you?



## Performance commitments and key investment areas – (figures 35 and 36)

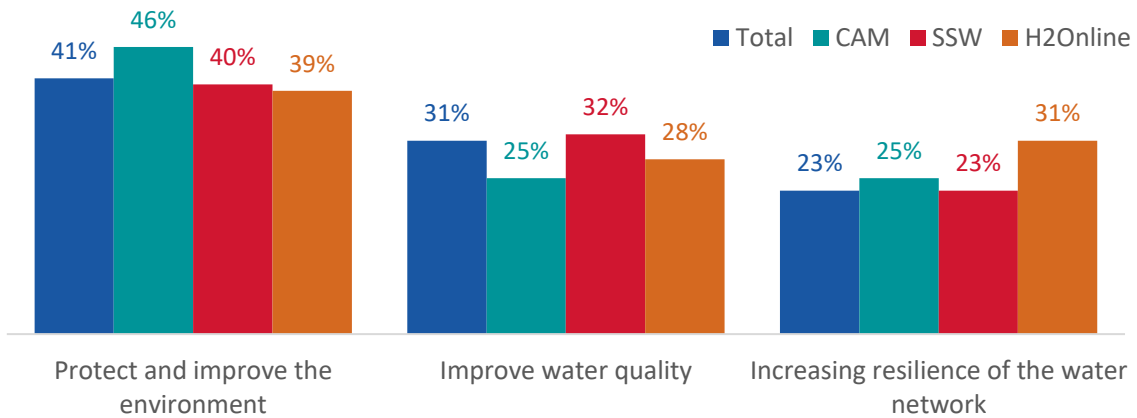
- As with the main survey, the most important performance commitment by far was reducing leakage (70%), followed by preventing issues with the taste, smell and appearance of tap water (20%) and reducing the duration of water interruptions (2%).
- A greater majority of H2Online participants chose reducing leakage (70%) compared to the main survey (51%).

**Figure 35** Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you?



- The most important investment area was the same as for the main survey, ‘*protect and improve the environment*’, with similar percentages for both (39% for H2Online, 41% for the main survey).
- However, uniquely, H2Online participants were more likely to select ‘*increasing resilience of the water network*’ than ‘*improve water quality*’ with 31% choosing this option compared to 23% in the main survey.

**Figure 36** Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you?

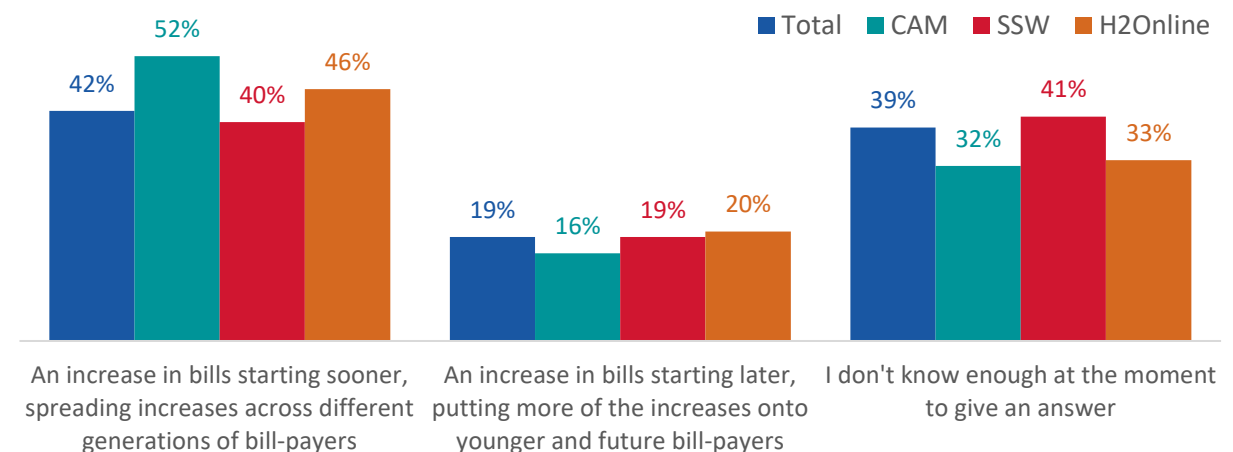


Base: Total (1,104), CAM (214), SSW (890), H2Online (54)

### Intergenerational phasing – (figure 37)

- Similarly to the main survey, the most popular option was an increase in bills starting sooner with almost half (46%) of H2Online participants selecting this option followed by not knowing enough to give an answer (33%) and then an increase in bills starting later (20%).

**Figure 37** Q27. Long term investment will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer?



Base: Total (1,104), CAM (214), SSW (890), H2O online (54)

# APPENDIX A

Adherence to Ofwat's standards for high quality customer research

Requirement	How the study has adhered
<ul style="list-style-type: none"> <li>■ Useful and contextualised</li> </ul>	<p>Research objectives aligned to PR24 and undertaken in accordance with Ofwat &amp; CCW’s published guidance. This research was conducted in order to test customer perceptions of the acceptability and affordability of South Staffs’ business plan for 2025-2030 and will be used by South Staffs to shape the final business plan.</p>
<ul style="list-style-type: none"> <li>■ Neutrally designed</li> </ul>	<p>Outside of the prescribed Ofwat guidance, every effort has been made to ensure that the research is neutral and free from bias. All elements of design were checked and challenged by SSC’s ICG.</p>
<ul style="list-style-type: none"> <li>■ Fit for purpose</li> </ul>	<p>Research undertaken in accordance with Ofwat &amp; CCW’s published guidance. Cognitive testing was carried out to ensure the complex subject matter was presented in the questionnaire in a way which was as understandable and engaging as possible for participants. Visual stimulus was created in order to aid participant understanding of the proposed plan.</p>
<ul style="list-style-type: none"> <li>■ Inclusive</li> </ul>	<p>Household and business customers were represented. Lower IMD deciles were over-sampled and higher IMD deciles under-sampled, to compensate for lower response rates. The response rates were monitored across a range of demographics to ensure representation, although the prescribed methodology prevents any interventions in this regard. Accommodation was made for accessibility requests (including paper/postal versions), via a freephone number.</p>
<ul style="list-style-type: none"> <li>■ Continual</li> </ul>	<p>This research builds on the foundation of the qualitative work and contributes towards the ongoing development of policy and plans.</p>
<ul style="list-style-type: none"> <li>■ Independently assured</li> </ul>	<p>All research was conducted by Accent, an independent market research agency. South Staffs collaborated with SSC’s ICG Chair who reviewed all research materials and provided a check and challenge approach on the method and findings.</p>
<ul style="list-style-type: none"> <li>■ Shared in full with others</li> </ul>	<p>The research will be published and shared on the South Staffs website.</p>
<ul style="list-style-type: none"> <li>■ Ethical</li> </ul>	<p>Research conducted in accordance with the Market Research Society code of conduct and conforming to the requirements of ISO 20252:2019. Accent and South Staffs were subject to strict data protection protocols.</p>

# APPENDIX B

Additional Information

The following information on **Quantitative** work is available upon request:

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews, synchronous or asynchronous),
- The target group and sample selection methods,
- Assessment of sample representation of target population and respective implications,
- The sampling method, including size of planned and achieved sample, reasons for differences in planned and achieved and how any problems in this respect were dealt with,
- Response rate where probability samples were used and its definition and calculation method,
- Participation rate where non-probability samples were used,
- The number of interviewers or moderators, if applicable,
- The fieldworker/moderator validation methods, if applicable,
- The questionnaires, any visual exhibits or show cards, and other relevant data collection documents,
- The weighting procedures, if applicable,
- Any methods statistical analysis used,
- The estimating and imputation procedures, if applicable,
- The results that are based on subgroups and the number of cases used in subgroup analysis,
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used).

# APPENDIX C

## Limitations

<b>Limitation</b>	<b>Impact</b>
Recruiting NHH participants via CATI proved challenging	A low percentage of the NHH sample consists of CATI participants.
Larger NHH participants were harder to recruit	The NHH sample is skewed towards smaller organisations, particularly micro businesses.
The H2Online survey's sample size is small	The data from the H2Online survey should be interpreted with caution.



# APPENDIX D

Fieldwork Materials

# Cambridge Water invitation letter



3 Orchard Place  
London  
SW1H 0BF

Customer name  
Address

Unique ID number: XXXX  
PIN: nnnn

Dear Customer,

## Water services research: give your feedback and receive a £10 voucher

Accent (an independent market research company) is working with **Cambridge Water**, the organisation which supplies clean water services to customers across the Cambridge region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### How to take part

The questionnaire will take about 15 - 20 minutes to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate and complete it online by entering the following link or scanning the QR code: <https://acsvy.com/3610CAMsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



The final date for us to receive completed surveys is **Wednesday 6<sup>th</sup> September, 2023**. Cambridge Water will be incredibly grateful if you are able to share your views, but taking part is completely optional.

Alternatively, you can fill the questionnaire in by pen and paper. To request a paper version of the survey please call FREEPHONE 0800 099 6595. You will be asked to leave your name 4-digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post and include a FREEPOST return envelope for you to post it back.

If you have any questions, please do not hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com). You will find more details about the survey on the back of this letter.

Yours faithfully

Rachel Risely on behalf of Accent and Cambridge Water



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

## About this survey

We have detailed below the answers to some frequently asked questions you might have about the survey.

### Q. How do I check if this research is genuine?

A. If you want to find out more about Cambridge Water's customer feedback programme and independent research companies it works with, please visit [www.cambridge-water.co.uk](http://www.cambridge-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact Cambridge Water on 01223 706050.

### Q. What information will be shown in the survey?

A. You will be shown information about Cambridge Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what Cambridge Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on Cambridge Water's plans.

### Q. Will my responses in the survey be attached to me?

A. No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

### Q. Why might I not be eligible to part in the survey?

A. Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

### Q. Why have I received this letter?

A. South Staffordshire Water Plc incorporating the Cambridge Water region is undertaking research to inform its business plan for the period 2025 – 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. Cambridge Water is sharing a limited set of personal data with Accent for the purpose of this research. They will collect and use personal data for only the purpose of the research and also to update Cambridge Water if you inform them that any of your details are incorrect. Cambridge Water do this in accordance with its privacy policy - [www.cambridge-water.co.uk/privacy-cookie-policy](http://www.cambridge-water.co.uk/privacy-cookie-policy). Cambridge Water process your personal data in this way as they are required by law to do so, including for statutory and government purposes.

Cambridge Water's records indicate that you have not opted out of receiving communications about market research. Communications regarding market research are not direct marketing, and do not require your direct consent. However, if you wish to opt out of communications about market research from now then please give your consent for us to tell Cambridge Water to update their records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or contacting Cambridge Water at: [www.cambridge-water.co.uk/contact-us](http://www.cambridge-water.co.uk/contact-us).

# Cambridge Water invitation letter (Retail)

Hello,

## **SUBJECT: Water services research – give your feedback and receive a £10 voucher**

Accent (an independent market research company) is working with **Cambridge Water**, the organisation which supplies clean water services to customers across the Cambridge region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

## **How to take part**

The questionnaire will take about **15 – 20 minutes** to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate, and complete it online by clicking the following link: <https://acsvy.com/3610CAMsurvey>

The final date for us to receive completed surveys is **5<sup>th</sup> September 2023**. Cambridge Water will be very grateful if you are able to share your views, but taking part is completely optional.

If you have any questions about this research, please don't hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com) or calling 0800 099 6595.

Best wishes,

Rachel Risely on behalf of Accent and Cambridge Water

## **About this survey**

We have detailed below the answers to some frequently asked questions you might have about the survey.

### **Q. How do I check if this research is genuine?**

**A.** If you want to find out more about Cambridge Water's customer feedback programme and independent research companies it works with, please visit [www.cambridge-water.co.uk](http://www.cambridge-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact Cambridge Water at: <https://www.cambridge-water.co.uk/contact-us>

### **Q. What information will be shown in the survey?**

**A.** You will be shown information about Cambridge Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what Cambridge Water's records say you have paid for your water services over the 12-month period

for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on Cambridge Water's plans.

**Q. Will my responses in the survey be attached to me?**

**A.** No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

**Q. Why might I not be eligible to part in the survey?**

**A.** Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

**Q. Why have I received this email?**

**A.** South Staffordshire Water Plc incorporating the Cambridge Water region is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. Cambridge Water is sharing a limited set of personal data with Accent for the purpose of this research. Accent will collect and use personal data for only the purpose of the research and also to update Cambridge Water if you inform them that any of your details are incorrect. Cambridge Water do this in accordance with its privacy policy - [www.cambridge-water.co.uk/privacy-cookie-policy](http://www.cambridge-water.co.uk/privacy-cookie-policy).

Cambridge Water's records indicate that you have not opted out of receiving communications about market research. If you wish to opt out of these then please give your consent for us to tell Cambridge Water to update its records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or by contacting Cambridge Water at: [www.cambridge-water.co.uk/contact-us](http://www.cambridge-water.co.uk/contact-us).

# South Staffs Water Invitation letter



Customer name  
Address

3 Orchard Place  
London  
SW1H 0BF

Unique ID number: XXXX  
PIN: nnnn

Dear Customer,

## Water services research: give your feedback and receive a £10 voucher

Accent (an independent market research company) is working with **South Staffs Water**, the organisation which supplies clean water services to customers across the South Staffs region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### How to take part

The questionnaire will take about 15 - 20 minutes to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate and complete it online by entering the following link or scanning the QR code: <https://acsvy.com/3610SSWsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



The final date for us to receive completed surveys is **Wednesday 6<sup>th</sup> September, 2023**. South Staffs Water will be incredibly grateful if you are able to share your views, but taking part is completely optional.

Alternatively, you can fill the questionnaire in by pen and paper. To request a paper version of the survey please call FREEPHONE 0800 099 6594. You will be asked to leave your name and the 4-digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post and include a FREEPOST return envelope for you to post it back.

If you have any questions, please do not hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com). You will find more details about the survey on the back of this letter.

Yours faithfully

Rachel Risely on behalf of Accent and South Staffs Water



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

## About this survey

We have detailed below the answers to some frequently asked questions you might have about the survey.

### Q. How do I check if this research is genuine?

A. If you want to find out more about South Staffs Water's customer feedback programme and the independent market research companies it works with, please visit [www.south-staffs-water.co.uk](http://www.south-staffs-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact South Staffs Water on 0345 60 70 456.

### Q. What information will be shown in the survey?

A. You will be shown information about South Staffs Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what South Staffs Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on South Staffs Water's plans.

### Q. Will my responses in the survey be attached to me?

A. No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

### Q. Why might I not be eligible to part in the survey?

A. Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

### Q. Why have I received this letter?

A. South Staffordshire Water Plc incorporating the South Staffs Water region is undertaking research to inform its business plan for the period 2025 – 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. South Staffs Water is sharing a limited set of personal data with Accent for the purpose of this research. They will collect and use personal data for only the purpose of the research and also to update South Staffs Water if you inform them that any of your details are incorrect. South Staffs Water do this in accordance with its privacy policy - [www.south-staffs-water.co.uk/privacy-cookie-policy](http://www.south-staffs-water.co.uk/privacy-cookie-policy). South Staffs Water process your personal data in this way as they are required by law to do so, including for statutory and government purposes.

South Staffs Water's records indicate that you have not opted out of receiving communications about market research. Communications regarding market research are not direct marketing, and do not require your direct consent. However, if you wish to opt out of communications about market research then please give your consent for us to tell South Staffs Water to update its records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or contacting South Staffs Water at: [www.south-staffs-water.co.uk/contact-us](http://www.south-staffs-water.co.uk/contact-us).

# South Staffs Water Invitation letter (retail)

Hello,

## **SUBJECT: Water services research – give your feedback and receive a £10 voucher**

Accent (an independent market research company) is working with **South Staffs Water**, the organisation which supplies clean water services to customers across the South Staffs region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### **How to take part**

The questionnaire will take about **15 – 20 minutes** to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate, and complete it online by clicking the following link: <https://acsvy.com/3610SSWsurvey>

The final date for us to receive completed surveys is **5<sup>th</sup> September 2023**. South Staffs Water will be very grateful if you are able to share your views, but taking part is completely optional.

If you have any questions about this research, please don't hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com) or calling 0800 099 6594.

Best wishes,

Rachel Risely on behalf of Accent and South Staffs Water

### **About this survey**

We have detailed below the answers to some frequently asked questions you might have about the survey.

#### **Q. How do I check if this research is genuine?**

**A.** If you want to find out more about South Staffs Water's customer feedback programme and the independent market research companies it works with, please visit [www.south-staffs-water.co.uk](http://www.south-staffs-water.co.uk) and search for "**Customer feedback – what to expect**". Or, you can contact South Staffs Water at: <https://www.south-staffs-water.co.uk/contact-us>

#### **Q. What information will be shown in the survey?**

**A.** You will be shown information about South Staffs Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what South Staffs Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on South Staffs Water's plans.

#### **Q. Will my responses in the survey be attached to me?**



**A.** No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

**Q. Why might I not be eligible to part in the survey?**

**A.** Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

**Q. Why have I received this email?**

**A.** South Staffordshire Water Plc incorporating the South Staffs Water region is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. South Staffs Water is sharing a limited set of personal data with Accent for the purpose of this research. Accent will collect and use personal data for only the purpose of the research and also to update South Staffs Water if you inform them that any of your details are incorrect. South Staffs Water do this in accordance with its privacy policy - [www.south-staffs-water.co.uk/privacy-cookie-policy](http://www.south-staffs-water.co.uk/privacy-cookie-policy).

# Cambridge Water email invite

Hello,

## **SUBJECT: Water services research – give your feedback and receive a £10 voucher**

Accent (an independent market research company) is working with **Cambridge Water**, the organisation which supplies clean water services to customers across the Cambridge region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### **How to take part**

The questionnaire will take about **15 – 20 minutes** to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate, and complete it online by clicking the following link: [\[INSERT LINK HERE\]](#).

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [\[INSERT LINK HERE\]](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **23<sup>rd</sup> August**. Cambridge Water will be very grateful if you are able to share your views, but taking part is completely optional.

If you have any questions about this research, please don't hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com) or calling FREEPHONE 0800 099 6595.

Best wishes,

Rachel Risely on behalf of Accent and Cambridge Water

### **About this survey**

We have detailed below the answers to some frequently asked questions you might have about the survey.

**Q. How do I check if this research is genuine?**

**A.** If you want to find out more about Cambridge Water's customer feedback programme and independent research companies it works with, please visit [www.cambridge-water.co.uk](http://www.cambridge-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact Cambridge Water at: <https://www.cambridge-water.co.uk/contact-us>

**Q. What information will be shown in the survey?**

**A.** You will be shown information about Cambridge Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what Cambridge Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on Cambridge Water's plans.

**Q. Will my responses in the survey be attached to me?**

**A.** No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

**Q. Why might I not be eligible to part in the survey?**

**A.** Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

**Q. Why have I received this email?**

**A.** South Staffordshire Water Plc incorporating the Cambridge Water region is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. Cambridge Water is sharing a limited set of personal data with Accent for the purpose of this research. Accent will collect and use personal data for only the purpose of the research and also to update Cambridge Water if you inform them that any of your details are incorrect. Cambridge Water do this in accordance with its privacy policy - [www.cambridge-water.co.uk/privacy-cookie-policy](http://www.cambridge-water.co.uk/privacy-cookie-policy).

Cambridge Water's records indicate that you have not opted out of receiving communications about market research. If you wish to opt out of these then please give your consent for us to tell Cambridge Water to update its records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or by contacting Cambridge Water at: [www.cambridge-water.co.uk/contact-us](http://www.cambridge-water.co.uk/contact-us).

# South Staffs Water email invite

Hello,

## **SUBJECT: Water services research – give your feedback and receive a £10 voucher**

Accent (an independent market research company) is working with **South Staffs Water**, the organisation which supplies clean water services to customers across the South Staffs region.

We want to understand your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

### **How to take part**

The questionnaire will take about **15 – 20 minutes** to complete and can be done on a laptop, tablet, PC or on mobile. You can check your eligibility to participate, and complete it online by clicking the following link: [\[INSERT LINK HERE\]](#).

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [\[INSERT LINK HERE\]](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **23<sup>rd</sup> August**. South Staffs Water will be very grateful if you are able to share your views, but taking part is completely optional.

If you have any questions about this research, please don't hesitate to contact the research team by emailing [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com) or calling FREEPHONE 0800 099 6594.

Best wishes,

Rachel Risely on behalf of Accent and South Staffs Water

### **About this survey**

We have detailed below the answers to some frequently asked questions you might have about the survey.

#### **Q. How do I check if this research is genuine?**

**A.** If you want to find out more about South Staffs Water's customer feedback programme and the independent market research companies it works with, please visit [www.south-staffs-water.co.uk](http://www.south-staffs-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact South Staffs Water at: <https://www.south-staffs-water.co.uk/contact-us>

#### **Q. What information will be shown in the survey?**

**A.** You will be shown information about South Staffs Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will

be estimated from what South Staffs Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on South Staffs Water's plans.

**Q. Will my responses in the survey be attached to me?**

**A.** No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

**Q. Why might I not be eligible to part in the survey?**

**A.** Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

**Q. Why have I received this email?**

**A.** South Staffordshire Water Plc incorporating the South Staffs Water region is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. South Staffs Water is sharing a limited set of personal data with Accent for the purpose of this research. Accent will collect and use personal data for only the purpose of the research and also to update South Staffs Water if you inform them that any of your details are incorrect. South Staffs Water do this in accordance with its privacy policy - [www.south-staffs-water.co.uk/privacy-cookie-policy](http://www.south-staffs-water.co.uk/privacy-cookie-policy).

South Staffs Water's records indicate that you have not opted out of receiving communications about market research. If you wish to opt out of these then please give your consent for us to tell South Staffs Water to update its records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or by contacting South Staffs Water at: [www.south-staffs-water.co.uk/contact-us](http://www.south-staffs-water.co.uk/contact-us).

# South Staffs Water reminder letter

Hello,

## **Water services research: Still time to have your say and receive a £10 voucher**

Accent (an independent market research company) is working with **South Staffs Water**, the organisation which supplies clean water services to customers across the South Staffs region.

There is still time to share your views on the **company's proposed plans for 2025 onwards** and whether you support them, and the costs associated with delivering them. This is an important opportunity for you to help your water company shape its short- and long-term plans.

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

## **How to take part**

The questionnaire will take about **15 – 20 minutes** to complete and can be done on a laptop, tablet, PC or on mobile.

[\[INSERT LINK HERE\]](#)

*(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)*

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [\[INSERT LINK HERE\]](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **5<sup>th</sup> of September 2023**. South Staffs Water will be very grateful if you are able to share your views, but taking part is completely optional.

If you have any questions about this research, please don't hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com) or calling FREEPHONE 0800 099 6594.

Best wishes,

Rachel Risely on behalf of Accent and South Staffs Water

## **About this survey**

We have detailed below the answers to some frequently asked questions you might have about the survey.

**Q. How do I check if this research is genuine?**

**A.** If you want to find out more about South Staffs Water's customer feedback programme and the independent market research companies it works with, please visit [www.south-staffs-water.co.uk](http://www.south-staffs-water.co.uk) and search for "Customer feedback – what to expect". Or, you can contact South Staffs Water at: <https://www.south-staffs-water.co.uk/contact-us>

**Q. What information will be shown in the survey?**

**A.** You will be shown information about South Staffs Water's business plan for 2025-2030. This will include information about investments the company plans to make. **It will also show you what your future water bills could be.** This will be estimated from what South Staffs Water's records say you have paid for your water services over the 12-month period for 2022/23. No information shown in this survey means that you need to take any action on your account, including paying your water bill. The information shown about your future bills is just illustrations to help you give your views on South Staffs Water's plans.

**Q. Will my responses in the survey be attached to me?**

**A.** No. Please be aware that this study is being conducted under the terms of the UK Market Research Society code of conduct, which can be viewed at [www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf](http://www.mrs.org.uk/pdf/MRS-code-of-conduct-2023.pdf), and is completely confidential.

**Q. Why might I not be eligible to part in the survey?**

**A.** Ofwat, the water regulator, has asked water companies to follow guidance around who is eligible to take part in this survey. For example, you must be over 18 and be responsible, or jointly responsible, for paying your water bill. Please accept our apologies if you find you are unable to take part this time, there will be more opportunities to do so in the future.

**Q. Why have I received this email?**

**A.** South Staffordshire Water Plc incorporating the South Staffs Water region is undertaking research to inform its business plan for the period 2025 to 2030 which is required by Ofwat, the water regulator, as it is for all other water companies. This is being conducted by a research agency called Accent Marketing & Research Ltd. South Staffs Water is sharing a limited set of personal data with Accent for the purpose of this research. Accent will collect and use personal data for only the purpose of the research and also to update South Staffs Water if you inform them that any of your details are incorrect. South Staffs Water do this in accordance with its privacy policy - [www.south-staffs-water.co.uk/privacy-cookie-policy](http://www.south-staffs-water.co.uk/privacy-cookie-policy).

South Staffs Water's records indicate that you have not opted out of receiving communications about market research. If you wish to opt out of these then please give your consent for us to tell South Staffs Water to update its records accordingly. You can do this by e-mailing Accent at [SSCWatersurvey@accent-mr.com](mailto:SSCWatersurvey@accent-mr.com), or by contacting South Staffs Water at: [www.south-staffs-water.co.uk/contact-us](http://www.south-staffs-water.co.uk/contact-us) at: [www.cambridge-water.co.uk/contact-us](http://www.cambridge-water.co.uk/contact-us).

# Cambridge Water paper version cover



3 Orchard Place  
London  
SW1H 0BF

Customer name  
Address

Unique ID number: XXXX  
PIN: nnnn

Dear Customer,

## Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for Cambridge Water. Please find it attached. This pack should contain:

- (1) This letter
- (2) A paper version of the survey
- (3) Two personalised bill impact graphs (for use with Question 11 and Question 25)
- (4) A reply envelope (pre-paid - no stamp required)

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

## How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3610CAMsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



Please note: the final date for us to receive completed surveys (including paper submissions) is Monday 11<sup>th</sup> September 2023.

If you have any questions, please do not hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com).

Yours faithfully

Rachel Risely on behalf of Accent and Cambridge Water



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



# South Staffs Water paper version cover



Customer name  
Address

3 Orchard Place  
London  
SW1H 0BF

Unique ID number: XXXX  
PIN: nnnn

Dear Customer,

## Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for South Staffs Water. Please find it attached. This pack should contain:

- (1) This letter
- (2) A paper version of the survey
- (3) Two personalised bill impact graphs (for use with Question 11 and Question 25)
- (4) A reply envelope (pre-paid - no stamp required)

Anyone who is eligible to take part and completes the full questionnaire will receive a **£10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate this to WaterAid. Details on how to claim your voucher are given at the end of the survey.

## How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvy.com/3610SSWsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



Please note: the final date for us to receive completed surveys (including paper submissions) is Monday 11<sup>th</sup> September 2023.

If you have any questions, please do not hesitate to contact the research team by emailing [SSCwatersurvey@accent-mr.com](mailto:SSCwatersurvey@accent-mr.com).

Yours faithfully

Rachel Risely on behalf of Accent and South Staffs Water



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

# APPENDIX E

Questionnaire (Online version)

## Cambridge Water – Online questionnaire



Thank you very much for agreeing to complete this [IF ONLINE] on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Cambridge Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone completing the survey in full will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

**IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.**

### About you

Q1. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

---

Q2. **IF HH:** Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

---

Q3. **IF HH:** How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Prefer not to say **THANK AND CLOSE**

**CODE AS** Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

---

Q4. **IF HH:** Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q5. **IF HH:** Do you have a water meter at **[IF HH]** your home **[IF NHH]** business/organisation?

Yes

No

Don't know

---

Q6. Cambridge Water is your water supplier, and Anglian Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

---

Q7. **IF NHH:** Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

---

Q8. **IF NHH:** Is Cambridge Water responsible for the water services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Cambridge Water area. Is that OK?

Yes

No **THANK AND CLOSE**

## Main Questionnaire

Thank you, **[IF CATI]** I **[IF ONLINE]** we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

**[ONLINE ONLY]**: For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

## Affordability

We are now going to ask you some questions about your **[IF HH]** household's/**[IF NHH]** organisation's financial situation.

---

Q9. Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time  
Most of the time  
Sometimes  
Rarely  
Never  
Prefer not to say

---

Q10. Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

**[IF HH]** Living/**[IF NHH]** Operating comfortably  
Doing alright  
Just about getting by  
Finding it quite difficult  
Finding it very difficult  
Prefer not to say

---

Q11. Thinking about your **[IF HH]** household's/ **[IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*  
A lot worse  
A bit worse  
Stay the same  
A bit better  
A lot better  
Prefer not to say  
Don't know

---

Q12. **IF NHH**: How much are you currently paying for your water and sewerage services bill, **each year**?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Don't know

---

Q13. **[IF HH] Your current water and sewerage services bill is #insert from sample# [all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

Don't know

---

Q13a. **[CATI ONLY] IF NHH:** At this point I need you to look at this chart which shows what your organisation's future water bills may look like under the plans Cambridge Water have

Please could you go to **LINK TBC**

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the Cambridge Water area. An estimate is absolutely fine.

**Interviewer note:** do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

## Proposed changes to your water/sewerage bill for the years 2025-2030.

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

**Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

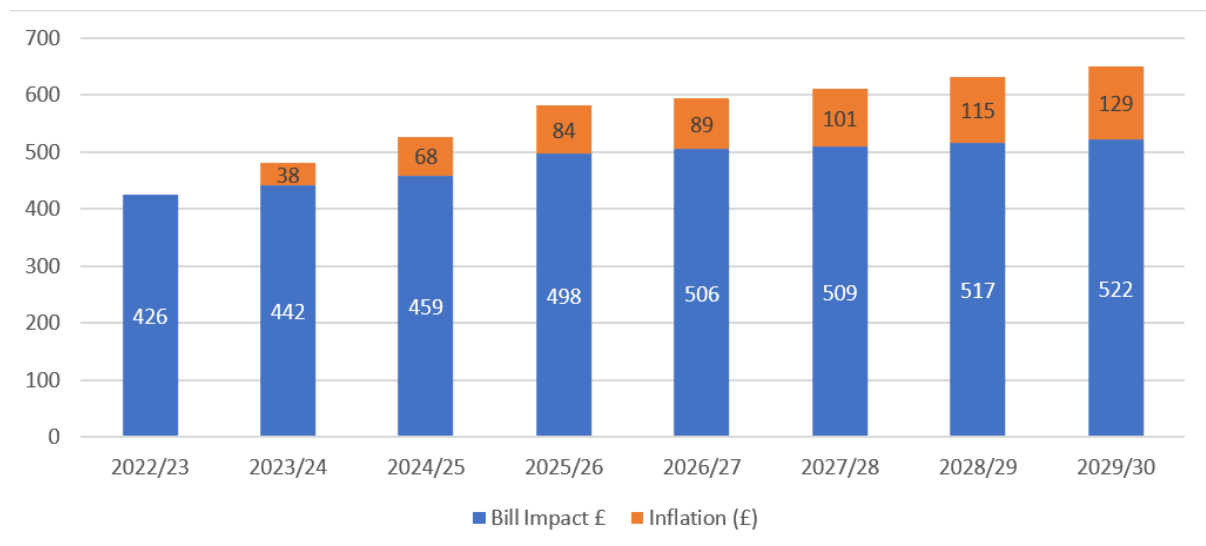
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water and sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**



**(Placeholder – this graph will be tailored according to bill amounts)**

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\CAM Bill Increase Graph calculator.xlsx>

USING CAMBS TAB

**[HH only]:** Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

**[IF Social Tariff Customer (from sample)]:** This bill profile is based on the financial support scheme you are currently on.

**IF ERROR! REFERENCE SOURCE NOT FOUND.= 'DON'T KNOW':** This bill profile is based on an example bill of £1,000.

---

Q14. How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Very easy

Fairly easy

Neither easy nor difficult **HH ONLY GO TO Q15**

Fairly difficult **HH ONLY GO TO Q15**

Very difficult **HH ONLY GO TO Q15**

Don't know

---

Q15. **[IF HH ONLY] IF Q14= 3,4,5** Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Shopping around more

Spending less on food shopping and essentials

Spending less on non-essentials

Cutting back on non-essential journeys in my vehicle

Eat out less

Using less fuel such as gas or electricity in my home

Using less water

Using my savings

Using credit more than usual, for example, credit cards, loans or overdrafts

Ask family and friends for financial support

Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**

Don't know

## Cambridge Water's Plans

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that Cambridge Water supplies.

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that Cambridge Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Anglian Water.

**[If HH show Slide 10]**



## About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as **two million** full baths

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

[If NHH show Slide 11]

## About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as **two million** full baths

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a business customer, you **can** choose which company sends you your water bills, handles any customer service queries and reads your meter. You **can't** choose which company supplies your clean water to your taps
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. Cambridge Water only provides water services to customers, and so that graph included costs for waste services that Cambridge Water do not provide and cannot control.

[IF HH] For context, the typical annual household bill for the clean water services that Cambridge Water provides is expected to increase from **£167** in 2023/24 to **£218** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

**[IF NHH]** For context, the typical annual business customer bill for the clean water services that Cambridge Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

**Q16. Water Supply Interruptions (please do not show Q title in script)**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how Cambridge Water is performing in the area of “Water Supply Interruptions”, against both their target and also the other water companies.

**[INSERT SLIDE 1]**

**Supply interruptions: the average length of time properties are without water**


**More about supply interruptions**

If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Performance is measured by: **Duration without water for more than 3 hours, by minutes per property**  
Companies with the lowest numbers in the table are performing **better**



Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **4<sup>th</sup>** of **19** companies on this measure



Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
<b>South Staffs &amp; Cambridge</b>	<b>00:03:15</b>
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance

Poorer performance

The following slide shows what Cambridge Water is proposing to do to improve its performance:

**[INSERT SLIDE 2]**

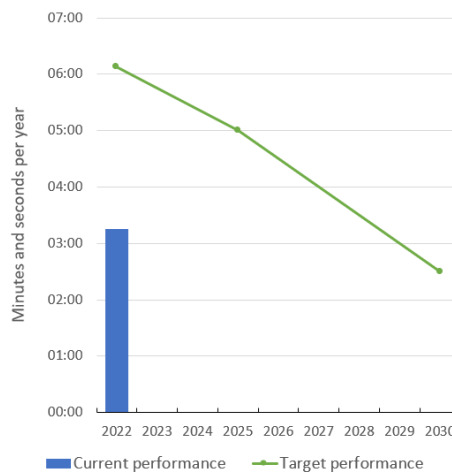
**Supply interruptions: the average length of time properties are without water**

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

**What Cambridge Water plan to do and the benefits this will bring**

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to **2 minutes and 30 seconds** per property by 2030.

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



Duration for more than 3 hours without water. A lower number is better.

**Q17. Leakages (please do not show Q title in script)**

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how Cambridge Water is performing in the area of “Leakages”, against both their target and also the other water companies.

[INSERT SLIDE 5]

### Leaks: The amount of water lost due to leaks from water mains and pipes



The following chart shows what Cambridge Water is proposing to do to improve its performance:

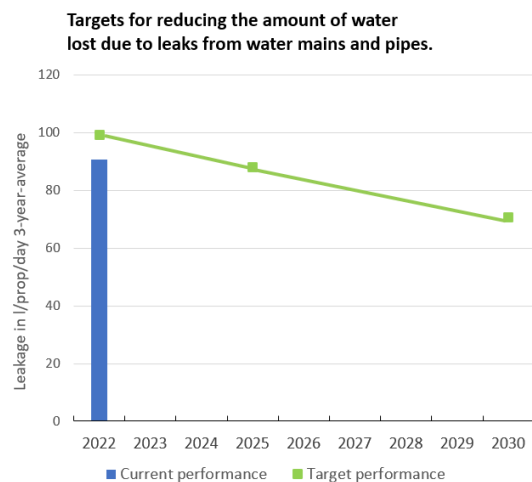
[INSERT SLIDE 6]

### Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in litres) due to leaks from water mains and pipes.

#### What Cambridge Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to 71 litres per property per day by 2030
- And then to reduce leakage by 50% to meet the 2050 national target, from 2017/18 levels.



Amount of water lost from pipes, expressed per property per day, in litres. A lower number is better.

## Q18. Water Quality Contacts (please do not show Q title in script)

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how Cambridge Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

[INSERT SLIDE 3]

### Water Quality: Appearance, taste and smell of tap water



The following chart shows what Cambridge Water is proposing to do to improve its performance:

[INSERT SLIDE 4]

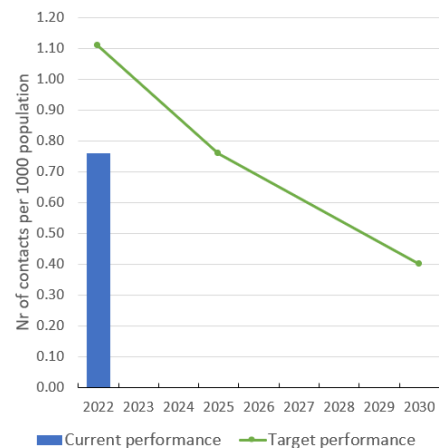
### Water Quality: Appearance, taste and smell of tap water

Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

#### What Cambridge Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000 population** by 2030.

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. A lower number is better.

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Reducing the duration of water interruptions of longer than 3 hours

- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

## Cambridge Water's Plans – Key Investment Areas

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next section will show you three of the important areas of investment in Cambridge Water's business plan before asking for your views on the plan as a whole.

Q20. The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 7 – HAS HOVER BUTTON]**

### Protect and restore the environment

#### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 31% between 2020 and 2050 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions. 

#### What Cambridge Water plan to do and the benefits this will bring

- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored
- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use, and help spot leaks faster. To avoid increased bills when moving onto a metred supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18



**To make these investments  
will cost £97 million between  
2025 and 2030**

**That's £10.20 more on the  
typical annual bill for  
household customers.**

**[Hover text]:** The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.

**Q21. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 8 – HAS HOVER BUTTON]**



## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers. 

### What Cambridge Water plan to do and the benefits this will bring

- **£13m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£4m to improve the filtration process** at water treatment sites - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as schools and care homes.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.



**To make these investments will cost £24 million between 2025 and 2030**

**That's £2.50 more on the typical annual bill for household customers.**

**[Hover text]:** Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

## Q22. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 9]**

## Increasing resilience of the water network

### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

### What Cambridge Water plan to do and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£9m to lay more pipes** – increases the flow of water around the network in the event of pipes failing
- **£3m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).



**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical annual bill for household customers.**

---

Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Protect and improve the environment  
Improve water quality  
Increasing resilience of the water network  
Don't know/can't say

---

Q24. Based on everything you have seen and read about Cambridge Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Completely acceptable **GO TO Q2626**  
Acceptable **GO TO Q2626**  
Unacceptable **GO TO Q2525**  
Completely unacceptable **GO TO Q2525**  
Don't know/can't say

---

Q25. **IF Q244=3 or 4** What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The bill increases are too expensive  
Company profits are too high  
Companies should pay for service improvements  
I expect better service improvements  
The plan is poor value for money  
Compared to energy prices it is more expensive  
I am dissatisfied with current services  
The plans don't focus on the right services  
I won't be able to afford this  
I don't trust them to make these service improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

Q26. **IF Q244=1 OR 2** What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The plan is good value for money  
The plan is affordable  
Compared to energy prices it's cheaper  
Their plans seem to focus on the right services  
The company provides a good service now  
I support what they are trying to do in the long term  
The change to my bill is small  
I trust them to do what's best for customers  
I have been dissatisfied with the service recently but am pleased that they are making improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

**Q27. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

Long term investment by Cambridge Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

*Please select one answer only*

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

As you saw previously, this chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about Cambridge Water's plans for 2025-2030.

HH: INSERT WATER ONLY BILL.

NHH: USE MULTIPLIER OF 0.380621 FROM CAM BILL CALCULATOR BELOW TO CALCULATE WATER ONLY BILL

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\CAM Bill Increase Graph calculator.xlsx>

USING CAMBSWO TAB

**[HH only]:** Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

**[IF Social Tariff Customer (from sample)]:** This bill profile is based on the financial support scheme you are currently on.

---

**Q27a** How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

## Your views about water

---

**Q27b** How strongly do you agree/disagree with the following:

**ROTATE**  
**RESPONSE CODES 1=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDED DON'T KNOW**

I am concerned about the quality of the drinking water I receive at my home



I would be willing to change my daily habits to reduce my water usage  
My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere  
I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill  
I'm concerned about the quality of water in the rivers, streams or lakes in our local area  
It's important that my water company deals efficiently and quickly with customer service queries  
Companies should contribute towards the wellbeing of the communities they serve  
We should pay more for products/services that are environmentally friendly

**Q27c** [IF HH] How strongly do you agree or disagree with how the following statements apply to you and your life generally:

**1=STRONGLY DISAGREE/10=STRONGLY AGREE**

I am conscious of the world around me and think we all need to look after it for future generations  
Water is a precious resource and I'm careful about how much I use  
I'm prepared to switch suppliers (e.g gas/electricity, insurance) every year to get the best price

**Q27d** [IF HH] Which one of the following statements most closely applies to your use of water in your household?

I/We don't know how much we use, and I/we don't think about it  
I/We don't know how much we use, but I/we are conscious about it  
I/We're careful about how much we use because I/we want to keep our bill down  
I/We're careful about how much we use because I/we don't think we should waste water

**Q27e** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

**ROTATE**

Happy  
Depressed  
Stressed  
Optimistic  
Positive  
Worried  
Energetic  
Tired  
Other (please specify)

Prefer not to say **DO NOT ROTATE**

Don't know **DO NOT ROTATE**

**Q27f** Based on what you have read about Cambridge Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

## HH ONLY: Household Demographics

**Q28.** Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female  
Male  
I identify in another way  
Prefer not to say

---

Q29. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO Q3030**

Student

Prefer not to say

---

Q30. **IF Error! Reference source not found.29=RETIRED ASK** Does the main income earner have a state pension, a private pension or both?

State only

Private only **GO TO Q3031**

Both **GO TO Q3031**

Prefer not to say

---

Q31. **IF Q3030= PRIVATE OR BOTH ASK:** How would you describe the main income earner's occupation type before retirement?

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

---

Q32. Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion. **MULTICODE**

*Please select all that apply*

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

---

Q33. What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

*Please select one answer only*

**WHITE**

English, Welsh, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

**MIXED**

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

**ASIAN OR ASIAN BRITISH**

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

**BLACK OR BLACK BRITISH**

Caribbean

African

Any other Black background

**OTHER ETHNIC GROUP**

Arab

Any other ethnic group

Prefer not to say

---

Q34. Which of the following bands does your household income fall into from all sources, before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year

From £1,000 to £1,399 a week/From £52,000 to £72,799 a year

From £1,400 to £1,999 a week/From £72,800 to £103,999 a year

£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

**GO TO Q3939**

## NHH only: Non-Household Demographics

Q35. How does your organisation mainly use water at its premises? **MULTICODE**

*Please select all that apply*

For the manufacturing process which is essential to the running of your organisation (e.g. to power machinery, agricultural production etc)

For the supply of services your organisation provides (e.g. cleaning services etc)

For an ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)

None of the above

Don't Know

---

Q36. How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250+

Prefer not to say

---

Q37. How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

---

Q38. Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities

Professional, scientific and technical activities

Administrative and Support Service Activities

Public administration and defence

Education

Human health and social work activities

Arts, entertainment and recreation

Other service activities

Other (please specify)

Prefer not to say

## Final Questions

Q39. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS

M&S Voucher by email COLLECT EMAIL ADDRESS

One4All by email COLLECT EMAIL ADDRESS

Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Q40. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

Q41. **[CATI ONLY]** Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes

No

Q42. **[IF HH]** Cambridge Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here: <https://www.cambridge-water.co.uk/household/extra-help/help-with-paying>

Q42a **[IF HH]** Would you like to join Cambridge Water's online community, called H<sub>2</sub>Online.

The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*

Yes

No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with Cambridge Water to send you an invite. This will be held securely and will only be used to invite you to join the online community in the coming days.

Thank you for taking part, your feedback will help Cambridge Water to finalise its business plan. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

## South Staffs Water – Online questionnaire



Thank you very much for agreeing to complete this [IF ONLINE] on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help South Staffs Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone completing the survey in full will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

**IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.**

### About you

Q1. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

Q2. **IF HH:** Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

---

Q3. **IF HH:** How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Prefer not to say **THANK AND CLOSE**

**CODE AS** Under 18 **THANK AND CLOSE**

18-24  
25-34  
35-44  
45-54  
55-64  
65-74  
75+

---

Q4. **IF HH:** Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes  
No, I am not responsible for paying the bill **THANK AND CLOSE**  
Don't know **THANK AND CLOSE**

---

Q5. Do you have a water meter at **[IF HH]** your home **[IF NHH]** your business/organisation?

Yes  
No  
Don't know

---

Q6. South Staffs Water is your water supplier, and Severn Trent Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**  
No **THANK AND CLOSE**  
Don't know **GO TO MAIN QUESTIONNAIRE**

---

Q7. **IF NHH:** Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes  
No **THANK AND CLOSE**

---

Q8. **IF NHH:** Is South Staffs Water responsible for the water services at your organisation?

Yes  
No **THANK AND CLOSE**  
Don't know **THANK AND CLOSE**

---

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the South Staffs Water area. Is that OK?

Yes  
No **THANK AND CLOSE**

## Main Questionnaire

Thank you, **[IF CATI]** I **[IF ONLINE]** we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

**[ONLINE ONLY]**: For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

## Affordability

We are now going to ask you some questions about your **[IF HH]** household's/**[IF NHH]** organisation's financial situation.

---

Q9. Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time  
Most of the time  
Sometimes  
Rarely  
Never  
Prefer not to say

---

Q10. Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

**[IF HH]** Living/**[IF NHH]** Operating comfortably  
Doing alright  
Just about getting by  
Finding it quite difficult  
Finding it very difficult  
Prefer not to say

---

Q11. Thinking about your **[IF HH]** household's/ **[IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*  
A lot worse  
A bit worse  
Stay the same  
A bit better  
A lot better  
Prefer not to say  
Don't know

---

Q12. **[IF NHH]**: How much are you currently paying for your water and sewerage services bill, **each year**?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Don't know



---

Q13. **[IF HH]** Your current water and sewerage services bill is #insert from sample# **[all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

---

Q13a. **[CATI ONLY] IF NHH:** At this point I need you to look at this chart which shows what your organisation's future water bills may look like under the plans South Staffs Water have

Please could you go to [LINK TBC](#)

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the South Staffs Water area. An estimate is absolutely fine.

**Interviewer note:** do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page

Cannot proceed now **Open appointment box**

## Proposed changes to your water/sewerage bill for the years 2025-2030.

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

### **Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

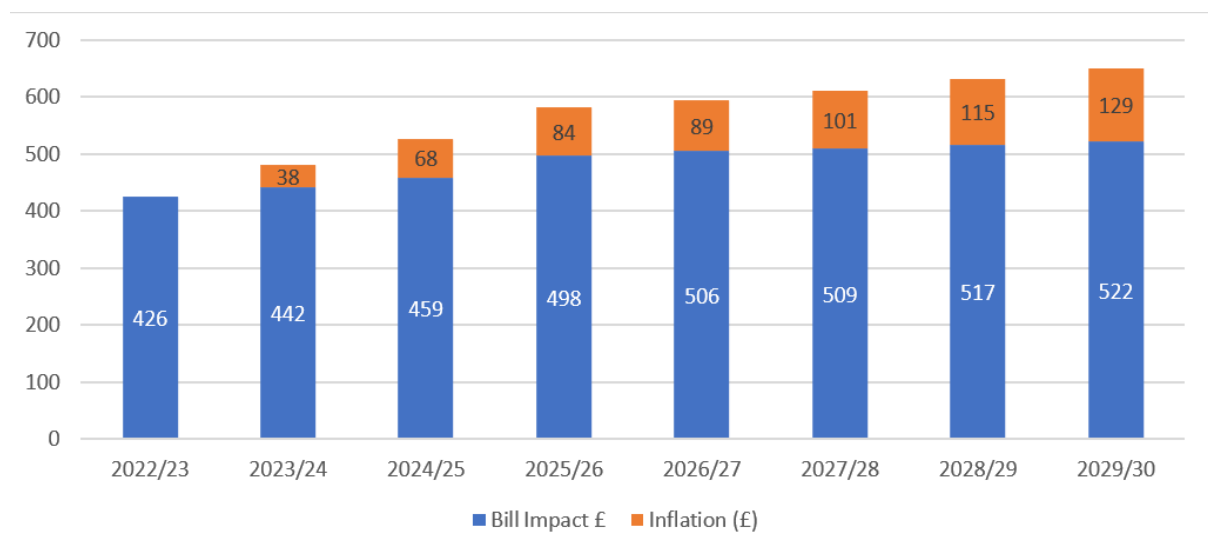
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water and sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**



**(Placeholder – this graph will be tailored according to bill amounts)**

<J:\3610 S Staffs A&A\Project management\workings & analysis\Quant bill calculator\SSW Bill Increase Graph calculator.xlsx>

USING SSW TAB

**[HH only]:** Please note that for the year 2022/23 South Staffs Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

**[IF Social Tariff Customer (from sample)]:** This bill profile is based on the financial support scheme you are currently on.

**IF ERROR! REFERENCE SOURCE NOT FOUND.= 'DON'T KNOW':** This bill profile is based on an example bill of £1,000.

---

Q14. How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Very easy  
Fairly easy  
Neither easy nor difficult **HH ONLY GO TO Q15**  
Fairly difficult **HH ONLY GO TO Q15**  
Very difficult **HH ONLY GO TO Q15**  
Don't know

---

Q15. **[IF HH ONLY] IF Q14= 3,4,5** Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Shopping around more  
Spending less on food shopping and essentials  
Spending less on non-essentials  
Cutting back on non-essential journeys in my vehicle  
Eat out less  
Using less fuel such as gas or electricity in my home  
Using less water  
Using my savings  
Using credit more than usual, for example, credit cards, loans or overdrafts  
Ask family and friends for financial support  
Other, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know

## South Staffs Water's Plans

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

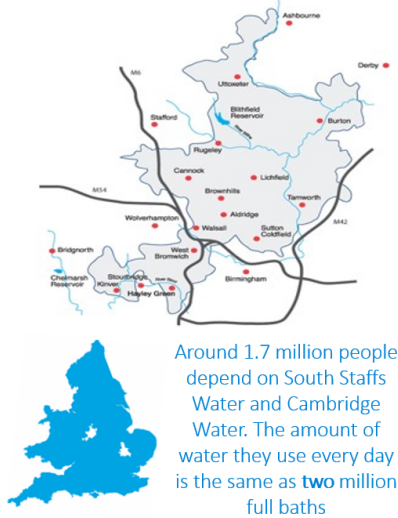
We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that South Staffs Water supplies.

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that South Staffs Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Severn Trent Water.

[If HH show Slide 10]

## About South Staffs Water

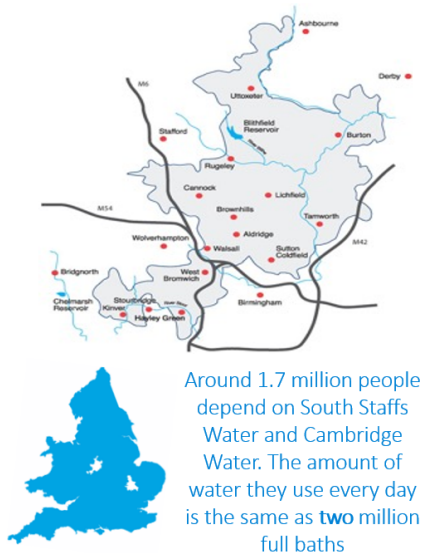


Around 1.7 million people depend on South Staffs Water and Cambridge Water. The amount of water they use every day is the same as **two million full baths**

- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

[If NHH show Slide 11]

## About South Staffs Water



Around 1.7 million people depend on South Staffs Water and Cambridge Water. The amount of water they use every day is the same as **two million full baths**

- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a business customer, you **can** choose which company sends you your water bills, handles any customer service queries and reads your meter. You can't choose which company supplies your clean water to your taps
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. South Staffs Water only provides water services to customers, and so that graph included costs for waste services that South Staffs do not provide and cannot control.

[If HH] For context, the typical annual household bill for the clean water services that South Staffs Water provides is expected to increase from **£174** in 2023/24 to **£228** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

[IF NHH] For context, the typical annual business customer bill for the clean water services that South Staffs Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

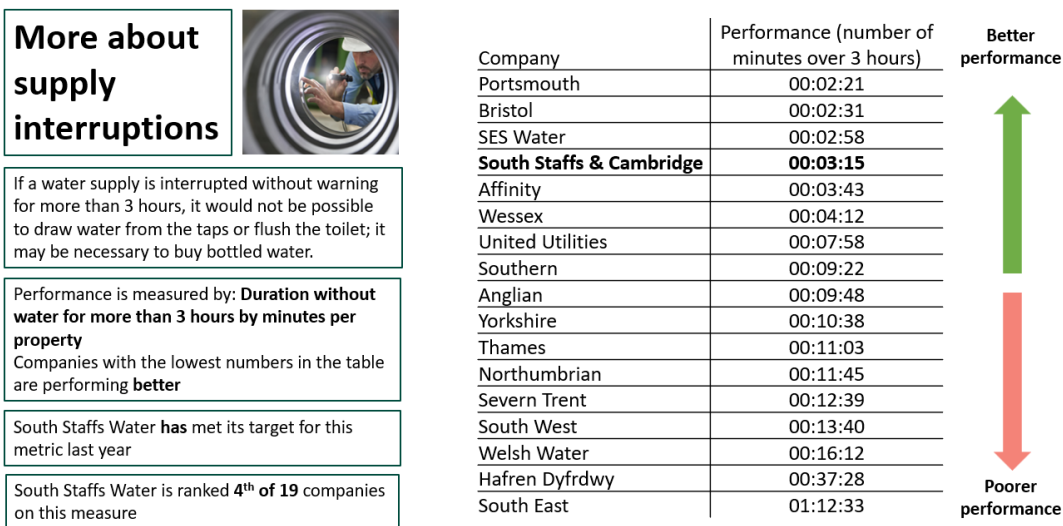
**Q16. Water Supply Interruptions (please do not show Q title in script)**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how South Staffs Water is performing in the area of “Water Supply Interruptions”, against both their target and also the other water companies.

[INSERT SLIDE 1]

**Supply interruptions: the average length of time properties are without water**



The following slide shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 2]

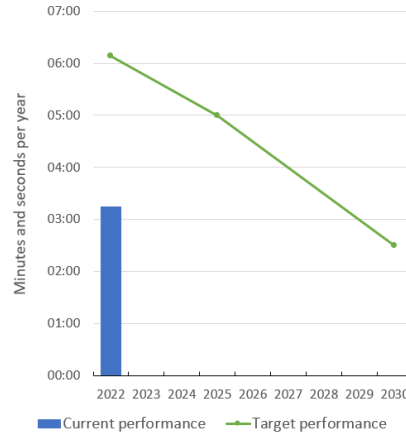
## Supply interruptions: the average length of time properties are without water

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

### What South Staffs Water plan to do and the benefits this will bring

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to 2 minutes and 30 seconds per property by 2030.

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



Duration for more than 3 hours without water. A lower number is better.

## Q17. Leakages (please do not show Q title in script)

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how South Staffs Water is performing in the area of “Leakages”, against both their target and also the other water companies.

[INSERT SLIDE 5]

## Leaks: The amount of water lost due to leaks from water mains and pipes

**More about leakage**



Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Performance is measured by: **Leakage per property served per day**  
Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **14<sup>th</sup> of 19** companies on this measure

Company	Performance (litres per property per day)
Bristol	65
Essex and Suffolk	76
Portsmouth	77
SES Water	79
Anglian	80
Southern	83
South East	88
Cambridge	91
Wessex	103
South West	108
Northumbrian	108
Affinity	109
Severn Trent	110
<b>South Staffs</b>	<b>113</b>
Yorkshire	123
United Utilities	124
Hafren Dyfrdwy	146
Thames	152
Welsh Water	159



The following chart shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 6]

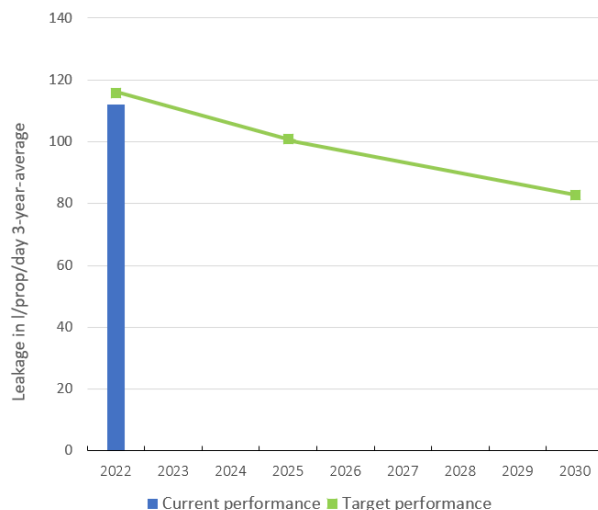
## Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in millions of litres) due to leaks from water mains and pipes.

### What South Staffs Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to 82 litres per property per day by 2030
- And then to reduce leakage by 50% to meet the 2050 national target, from 2017/18 levels.

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



Amount of water lost from pipes, expressed per property per day, in litres. A lower number is better.

## Q18. Water Quality Contacts (please do not show Q title in script)

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how South Staffs Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

**[INSERT SLIDE 3]**

### Water Quality: Appearance, taste and smell of tap water

#### More about water quality



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Performance is measured by: **Number of customer contacts received regarding incidents, per 1,000 population**  
Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **5<sup>th</sup>** of **19** companies on this measure

Company	Performance (number of contacts)	
Portsmouth	0.41	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">Better performance</div> <div style="flex-grow: 1;"> <div style="border-left: 2px solid green; height: 100%;"></div> <div style="border-left: 2px solid red; height: 100%;"></div> </div> <div style="margin-left: 10px;">Poorer performance</div> </div>
Thames	0.49	
SES Water	0.58	
Affinity	0.73	
<b>South Staffs &amp; Cambridge</b>	<b>0.76</b>	
Severn Trent	0.93	
Northumbrian	0.97	
Anglian	1.03	
Yorkshire	1.09	
Southern	1.1	
Wessex	1.17	
South East	1.34	
Bristol	1.38	
South West	1.55	
Hafren Dyfrdwy	1.71	
United Utilities	1.79	
Welsh Water	2.38	

The following chart shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 4]

## Water Quality: Appearance, taste and smell of tap water

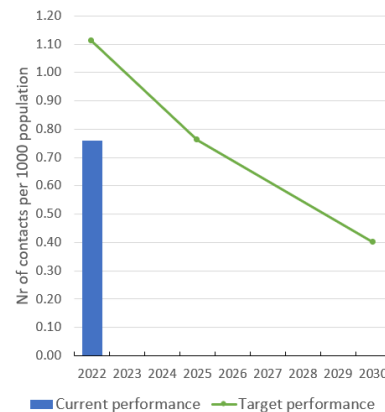
Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

### What South Staffs Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000 population** by 2030.

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. A lower number is better.

Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

## South Staffs Water's Plans – Key Investment Areas

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The next section will show you three of the important areas of investment in South Staffs Water's business plan before asking for your views on the plan as a whole.

Q20. The following slide describes one of the key investment areas of South Staffs Water's business plan:


[INSERT SLIDE 7 – HAS HOVER BUTTON]



## Protect and restore the environment

### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 19% by 2045 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use and help spot leaks faster. To avoid increased bills when moving onto a metred supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18
- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored in the Cambridge region



Investment

**To make these investments  
will cost £97 million  
between 2025 and 2030**

**That's £10.20 more on the  
typical annual bill for  
household customers.**

**[Hover text]:** The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.

---

### Q21. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN


The following slide describes one of the key investment areas of South Staffs Water's business plan:

**[INSERT SLIDE 8 – HAS HOVER BUTTON]**

## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£12m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£5m to improve the filtration process** at water treatment sites - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as nurseries and schools.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.



**To make these investments will cost £24 million between 2025 and 2030**

**That's £2.50 more on the typical annual bill for household customers.**

**[Hover text]:** Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

---

## Q22. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following slide describes one of the key investment areas of South Staffs Water's business plan:

**[INSERT SLIDE 9]**

### Increasing resilience of the water network

#### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

#### Key Investments by South Staffs Water and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£8m to lay more pipes** – increases the flow around the network in the event of pipes failing
- **£4m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).



**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical annual bill for household customers.**

---

Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Protect and improve the environment  
Improve water quality  
Increasing resilience of the water network  
Don't know/can't say

---

Q24. Based on everything you have seen and read about South Staffs Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Completely acceptable **GO TO Q2626**  
Acceptable **GO TO Q2626**  
Unacceptable **GO TO Q2525**  
Completely unacceptable **GO TO Q2525**  
Don't know/can't say

---

Q25. **IF Q244=3 or 4** What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The bill increases are too expensive  
Company profits are too high  
Companies should pay for service improvements  
I expect better service improvements  
The plan is poor value for money  
Compared to energy prices it is more expensive  
I am dissatisfied with current services  
The plans don't focus on the right services  
I won't be able to afford this  
I don't trust them to make these service improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

Q26. **IF Q244=1 OR 2** What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The plan is good value for money  
The plan is affordable  
Compared to energy prices it's cheaper  
Their plans seem to focus on the right services  
The company provides a good service now  
I support what they are trying to do in the long term  
The change to my bill is small  
I trust them to do what's best for customers  
I have been dissatisfied with the service recently but am pleased that they are making improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

**Q27. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

Long term investment by South Staffs Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

*Please select one answer only*

An increase in bills starting sooner, spreading increases across different generations of bill-payers  
An increase in bills starting later, putting more of the increases onto younger and future bill-payers  
I don't know enough at the moment to give an answer

As you saw previously, this chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about South Staffs Water's plans for 2025-2030.

HH: INSERT WATER ONLY BILL.

NHH: USE MULTIPLIER OF 0.455308 FROM SSW BILL CALCULATOR BELOW TO CALCULATE WATER ONLY BILL

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\SSW Bill Increase Graph calculator.xlsx>

USING sswwo TAB

**[HH only]:** Please note that for the year 2022/23 South Staffs Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

**[IF Social Tariff Customer (from sample)]:** This bill profile is based on the financial support scheme you are currently on.

---

**Q27a** How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

---

## Your views about water

**Q27b** How strongly do you agree/disagree with the following:

**ROTATE**

**RESPONSE CODES 1=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDED DON'T KNOW**

I am concerned about the quality of the drinking water I receive at my home  
I would be willing to change my daily habits to reduce my water usage  
My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere  
I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill  
I'm concerned about the quality of water in the rivers, streams or lakes in our local area  
It's important that my water company deals efficiently and quickly with customer service queries  
Companies should contribute towards the wellbeing of the communities they serve  
We should pay more for products/services that are environmentally friendly

**Q27c** **[IF HH]** How strongly do you agree or disagree with how the following statements apply to you and your life generally:  
**1=STRONGLY DISAGREE/10=STRONGLY AGREE**

I am conscious of the world around me and think we all need to look after it for future generations  
Water is a precious resource and I'm careful about how much I use  
I'm prepared to switch suppliers (e.g gas/electricity, insurance) every year to get the best price

**Q27d** **[IF HH]** Which one of the following statements most closely applies to your use of water in your household?  
I/We don't know how much we use, and I/we don't think about it  
I/We don't know how much we use, but I/we are conscious about it  
I/We're careful about how much we use because I/we want to keep our bill down  
I/We're careful about how much we use because I/we don't think we should waste water

**Q27e** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

**ROTATE**

Happy  
Depressed  
Stressed  
Optimistic  
Positive  
Worried  
Energetic  
Tired  
Other (please specify)

Prefer not to say **DO NOT ROTATE**

Don't know **DO NOT ROTATE**

**Q27f** Based on what you have read about South Staffs Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?  
[Open-ended answer] **DP PLEASE ADD TEXT BOX**

## HH ONLY: Household Demographics

Q28. Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female

Male

I identify in another way

Prefer not to say

---

Q29. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**High managerial, administrative or professional** e.g. doctor, lawyer, medium/large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO Q3030**

Student

Prefer not to say

---

Q30. **IF Error! Reference source not found.29=RETIRED ASK** Does the main income earner have a state pension, a private pension or both?

State only

Private only **GO TO Q3031**

Both **GO TO Q3031**

Prefer not to say

---

Q31. **IF Q3030= PRIVATE OR BOTH ASK:** How would you describe the main income earner's occupation type before retirement?

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

---

Q32. Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion. **MULTICODE**



*Please select all that apply*

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

---

Q33. What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

*Please select one answer only*

**WHITE**

English, Welsh, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

**MIXED**

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

**ASIAN OR ASIAN BRITISH**

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

**BLACK OR BLACK BRITISH**

Caribbean

African

Any other Black background

**OTHER ETHNIC GROUP**

Arab

Any other ethnic group

Prefer not to say

---

Q34. Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year

From £200 to £299 a week/From £10,400 to £15,599 a year

From £300 to £499 a week/From £15,600 to £25,999 a year

From £500 to £699 a week/From £26,000 to £36,399 a year

From £700 to £999 a week/From £36,400 to £51,999 a year  
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year  
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year  
£2,000 and above a week/£104,000 and above a Year  
Don't know  
Prefer not to say  
**GO TO Q3939**

## NHH only: Non-Household Demographics

Q35. How does your organisation mainly use water at its premises? **MULTICODE**

*Please select all that apply*

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)

For the supply of services your organisation provides (eg cleaning services etc)

For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)

None of the above

Don't Know

Q36. How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250+

Prefer not to say

Q37. How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

Q38. Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities



Professional, scientific and technical activities  
Administrative and Support Service Activities  
Public administration and defence  
Education  
Human health and social work activities  
Arts, entertainment and recreation  
Other service activities  
Other (please specify)  
Prefer not to say

## Final Questions

Q39. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS  
M&S Voucher by email COLLECT EMAIL ADDRESS  
One4All by email COLLECT EMAIL ADDRESS  
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Q40. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?  
Yes  
No

Q41. **[CATI ONLY]** Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential  
Yes  
No

Q42. **[IF HH]** South Staffs Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here: <https://www.south-staffs-water.co.uk/household/extra-help/help-with-paying>

Q42a **[IF HH]** Would you like to join South Staffs Water's online community, called H2Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*  
Yes  
No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with South Staffs Water to send you an invite. This will be held securely and will only be used to invite you to join the online community in the coming days.

Thank you for taking part, your feedback will help South Staffs Water to finalise its business plan.

This research was conducted under the terms of the MRS code of conduct and is completely confidential.

## Cambridge Water – H2Online Questionnaire

Thank you very much for agreeing to complete this [IF ONLINE] on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Cambridge Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone completing the survey in full will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

**IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.**

### About you

Q43. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

---

Q44. **IF HH:** Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

---

Q45. **IF HH:** How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Prefer not to say **THANK AND CLOSE**

**CODE AS** Under 18 **THANK AND CLOSE**

18-24

25-34

35-44

45-54

55-64

65-74

75+

---

Q46. **IF HH:** Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q47. **IF HH:** Do you have a water meter at **[IF HH]** your home **[IF NHH]** business/organisation?

Yes

No

Don't know

---

Q48. Cambridge Water is your water supplier, and Anglian Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

---

**Q6b** Please tell us how much you pay for your total water and sewerage bill – that's the total bill paid to both Cambridge Water and Anglian Water. Please provide the amount you think you have paid over the last 12 months.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Don't know

---

**Q6c** Please tell us how much you pay for your total clean water bill – that's the total bill paid just to Cambridge Water. Please provide the amount you think you have paid over the last 12 months.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**

Don't know

---

Q49. **IF NHH:** Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

---

Q50. **IF NHH:** Is Cambridge Water responsible for the water services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

---

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Cambridge Water area. Is that OK?

Yes

No **THANK AND CLOSE**

## Main Questionnaire

Thank you, **[IF CATI]** I **[IF ONLINE]** we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

**[ONLINE ONLY]:** For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

## Affordability

We are now going to ask you some questions about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

---

Q51. Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time

Most of the time

Sometimes

Rarely

Never

Prefer not to say

---

Q52. Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

**[IF HH]** Living/**[IF NHH]** Operating comfortably

Doing alright

Just about getting by

Finding it quite difficult

Finding it very difficult

Prefer not to say

---

Q53. Thinking about your **[IF HH]** household's/ **[IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

A lot worse

A bit worse

Stay the same

A bit better

A lot better

Prefer not to say

Don't know

---

Q54. **IF NHH:** How much are you currently paying for your water and sewerage services bill, **each year?**

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Don't know

---

Q55. **[IF HH]** Your current water and sewerage services bill is #insert from sample# **[all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*

Very easy  
Fairly easy  
Neither easy nor difficult  
Fairly difficult  
Very difficult  
Don't know

---

Q13a. **[CATI ONLY] IF NHH:** At this point I need you to look at this chart which shows what your organisation's future water bills may look like under the plans Cambridge Water have

Please could you go to **LINK TBC**

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the Cambridge Water area. An estimate is absolutely fine.

**Interviewer note:** do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page  
Cannot proceed now **Open appointment box**

## Proposed changes to your water/sewerage bill for the years 2025-2030.

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

**Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.

- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

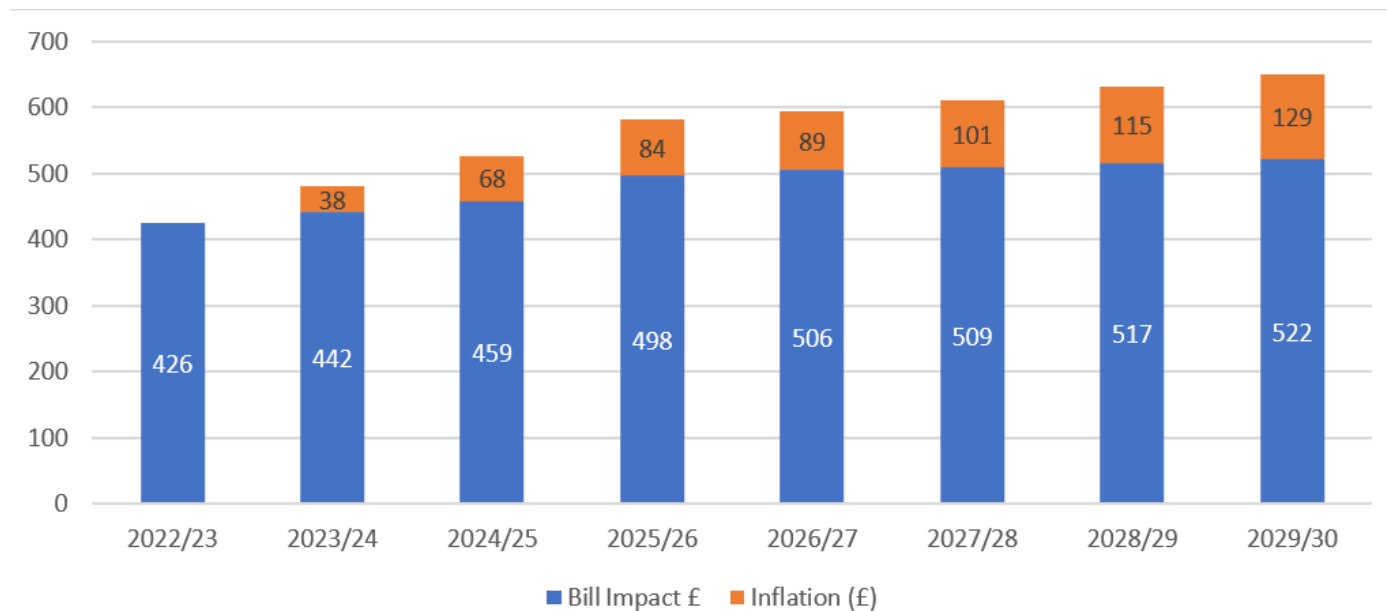
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water and sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**



**(Placeholder – this graph will be tailored according to bill amounts)**

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\CAM Bill Increase Graph calculator.xlsx>

USING CAMBS TAB

FOR DON'T KNOW USE £401.39

---

Q56. How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO Q15**
- Fairly difficult **HH ONLY GO TO Q15**
- Very difficult **HH ONLY GO TO Q15**
- Don't know

---

Q57. **[IF HH ONLY] IF Q14= 3,4,5** Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**
- Don't know

## Cambridge Water's Plans

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that Cambridge Water supplies.

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that Cambridge Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Anglian Water.

**[If HH show Slide 10]**



## About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as **two million** full baths

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

[If NHH show Slide 11]

## About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as **two million** full baths

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a business customer, you **can** choose which company sends you your water bills, handles any customer service queries and reads your meter. You **can't** choose which company supplies your clean water to your taps
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. Cambridge Water only provides water services to customers, and so that graph included costs for waste services that Cambridge Water do not provide and cannot control.

[IF HH] For context, the typical annual household bill for the clean water services that Cambridge Water provides is expected to increase from **£167** in 2023/24 to **£218** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

**[IF NHH]** For context, the typical annual business customer bill for the clean water services that Cambridge Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

**Q58. Water Supply Interruptions (please do not show Q title in script)**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how Cambridge Water is performing in the area of “Water Supply Interruptions”, against both their target and also the other water companies.

**[INSERT SLIDE 1]**

**Supply interruptions: the average length of time properties are without water**


**More about supply interruptions**

If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Performance is measured by: **Duration without water for more than 3 hours, by minutes per property**  
Companies with the lowest numbers in the table are performing **better**



Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **4<sup>th</sup>** of **19** companies on this measure



Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
<b>South Staffs &amp; Cambridge</b>	<b>00:03:15</b>
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

**Better performance**

**Poorer performance**

The following slide shows what Cambridge Water is proposing to do to improve its performance:

**[INSERT SLIDE 2]**

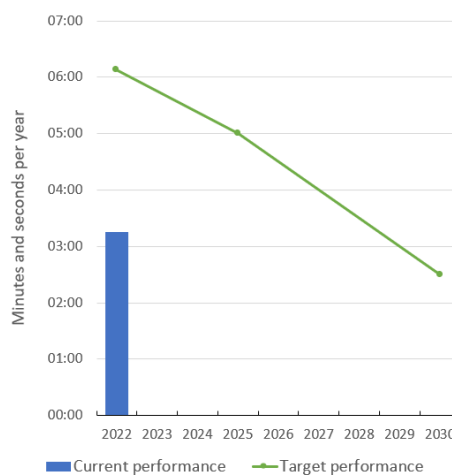
**Supply interruptions: the average length of time properties are without water**

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

**What Cambridge Water plan to do and the benefits this will bring**

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to **2 minutes and 30 seconds** per property by 2030.

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



Duration for more than 3 hours without water. **A lower number is better.**

**Q59. Leakages (please do not show Q title in script)**

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how Cambridge Water is performing in the area of “Leakages”, against both their target and also the other water companies.

[INSERT SLIDE 5]

### Leaks: The amount of water lost due to leaks from water mains and pipes



The following chart shows what Cambridge Water is proposing to do to improve its performance:

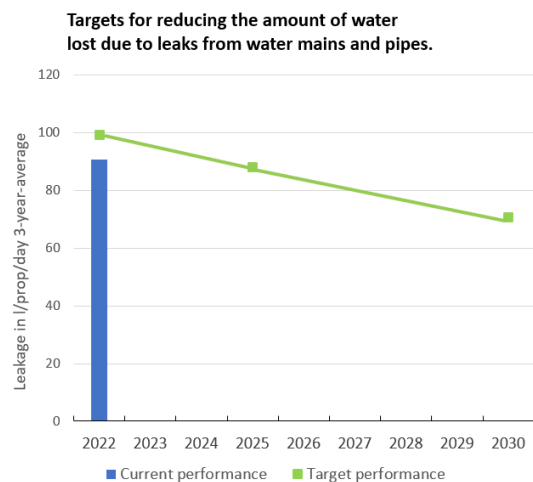
[INSERT SLIDE 6]

### Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in litres) due to leaks from water mains and pipes.

#### What Cambridge Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to 71 litres per property per day by 2030
- And then to reduce leakage by 50% to meet the 2050 national target, from 2017/18 levels.



Amount of water lost from pipes, expressed per property per day, in litres. A lower number is better.

## Q60. Water Quality Contacts (please do not show Q title in script)

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how Cambridge Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

[INSERT SLIDE 3]

### Water Quality: Appearance, taste and smell of tap water



The following chart shows what Cambridge Water is proposing to do to improve its performance:

[INSERT SLIDE 4]

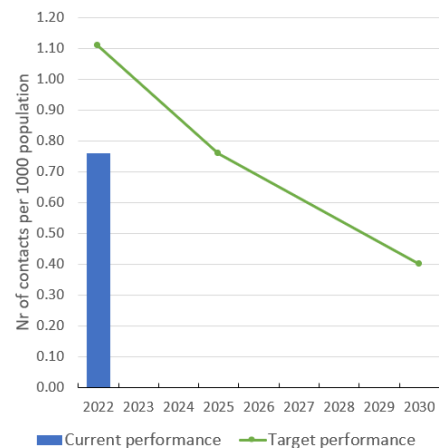
### Water Quality: Appearance, taste and smell of tap water

Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

#### What Cambridge Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000 population** by 2030.

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. A lower number is better.

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

Q61. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Reducing the duration of water interruptions of longer than 3 hours

Reducing leakage  
Preventing issues with taste/smell/appearance of tap water  
Don't know/can't say

## Cambridge Water's Plans – Key Investment Areas

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next section will show you three of the important areas of investment in Cambridge Water's business plan before asking for your views on the plan as a whole.


Q62. The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 7 – HAS HOVER BUTTON]**

### Protect and restore the environment

#### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 31% between 2020 and 2050 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions. 

#### What Cambridge Water plan to do and the benefits this will bring

- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored
- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use, and help spot leaks faster. To avoid increased bills when moving onto a metered supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18



**To make these investments  
will cost £97 million between  
2025 and 2030**

**That's £10.20 more on the  
typical annual bill for  
household customers.**

**[Hover text]:** The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.

**Q63. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 8 – HAS HOVER BUTTON]**



## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers.



### What Cambridge Water plan to do and the benefits this will bring

- **£13m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£4m to improve the filtration process** at water treatment sites - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as schools and care homes.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.



**To make these investments will cost £24 million between 2025 and 2030**

**That's £2.50 more on the typical annual bill for household customers.**

**[Hover text]:** Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

## Q64. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following slide describes one of the key investment areas of Cambridge Water's business plan:

**[INSERT SLIDE 9]**

## Increasing resilience of the water network

### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

### What Cambridge Water plan to do and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£9m to lay more pipes** – increases the flow of water around the network in the event of pipes failing
- **£3m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).



**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical annual bill for household customers.**

---

Q65. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Protect and improve the environment  
Improve water quality  
Increasing resilience of the water network  
Don't know/can't say

---

Q66. Based on everything you have seen and read about Cambridge Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Completely acceptable **GO TO Q2626**  
Acceptable **GO TO Q2626**  
Unacceptable **GO TO Q2525**  
Completely unacceptable **GO TO Q2525**  
Don't know/can't say

---

Q67. **IF Q244=3 or 4** What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The bill increases are too expensive  
Company profits are too high  
Companies should pay for service improvements  
I expect better service improvements  
The plan is poor value for money  
Compared to energy prices it is more expensive  
I am dissatisfied with current services  
The plans don't focus on the right services  
I won't be able to afford this  
I don't trust them to make these service improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

Q68. **IF Q244=1 OR 2** What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The plan is good value for money  
The plan is affordable  
Compared to energy prices it's cheaper  
Their plans seem to focus on the right services  
The company provides a good service now  
I support what they are trying to do in the long term  
The change to my bill is small  
I trust them to do what's best for customers  
I have been dissatisfied with the service recently but am pleased that they are making improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

**Q69. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

Long term investment by Cambridge Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

*Please select one answer only*

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

The chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about Cambridge Water's plans for 2025-2030.

INSERT WATER ONLY BILL.

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\CAM Bill Increase Graph calculator.xlsx>

USING CAMBSWO TAB

FOR DON'T KNOW USE £152.78

---

**Q27a** How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

---

## Your views about water

**Q27b** How strongly do you agree/disagree with the following:

**ROTATE**

**RESPONSE CODES 1=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDED DON'T KNOW**

- I am concerned about the quality of the drinking water I receive at my home
- I would be willing to change my daily habits to reduce my water usage
- My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere
- I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill
- I'm concerned about the quality of water in the rivers, streams or lakes in our local area
- It's important that my water company deals efficiently and quickly with customer service queries
- Companies should contribute towards the wellbeing of the communities they serve



We should pay more for products/services that are environmentally friendly

**Q27c** [IF HH] How strongly do you agree or disagree with how the following statements apply to you and your life generally:

**1=STRONGLY DISAGREE/10=STRONGLY AGREE**

I am conscious of the world around me and think we all need to look after it for future generations  
Water is a precious resource and I'm careful about how much I use  
I'm prepared to switch suppliers (e.g gas/electricity, insurance) every year to get the best price

**Q27d** [IF HH] Which one of the following statements most closely applies to your use of water in your household?

I/We don't know how much we use, and I/we don't think about it  
I/We don't know how much we use, but I/we are conscious about it  
I/We're careful about how much we use because I/we want to keep our bill down  
I/We're careful about how much we use because I/we don't think we should waste water

**Q27e** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

**ROTATE**

Happy  
Depressed  
Stressed  
Optimistic  
Positive  
Worried  
Energetic  
Tired  
Other (please specify)  
Prefer not to say **DO NOT ROTATE**  
Don't know **DO NOT ROTATE**

**Q27f** Based on what you have read about Cambridge Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?  
[Open-ended answer] **DP PLEASE ADD TEXT BOX**

## HH ONLY: Household Demographics

**Q70.** Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female  
Male  
I identify in another way  
Prefer not to say

**Q71.** Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO Q3030**

Student

Prefer not to say

---

Q72. **IF Error! Reference source not found.29=RETIRED ASK** Does the main income earner have a state pension, a private pension or both?

State only

Private only **GO TO Q3031**

Both **GO TO Q3031**

Prefer not to say

---

Q73. **IF Q3030= PRIVATE OR BOTH ASK:** How would you describe the main income earner's occupation type before retirement?

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

---

Q74. Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion. **MULTICODE**

*Please select all that apply*

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me  
Prefer not to say

---

Q75. What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

*Please select one answer only*

**WHITE**

English, Welsh, Scottish, Northern Irish or British  
Irish  
Gypsy or Irish Traveller  
Any other White background

**MIXED**

White and Black Caribbean  
White and Black African  
White and Asian  
Any other Mixed background

**ASIAN OR ASIAN BRITISH**

Indian  
Pakistani  
Bangladeshi  
Chinese  
Any other Asian background

**BLACK OR BLACK BRITISH**

Caribbean  
African  
Any other Black background

**OTHER ETHNIC GROUP**

Arab  
Any other ethnic group  
Prefer not to say

---

Q76. Which of the following bands does your household income fall into from all sources, before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year  
From £200 to £299 a week/From £10,400 to £15,599 a year  
From £300 to £499 a week/From £15,600 to £25,999 a year  
From £500 to £699 a week/From £26,000 to £36,399 a year  
From £700 to £999 a week/From £36,400 to £51,999 a year  
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year  
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year  
£2,000 and above a week/£104,000 and above a Year

Don't know

Prefer not to say

**GO TO Q3939**

---

## **NHH only:** Non-Household Demographics

Q77. How does your organisation mainly use water at its premises? **MULTICODE**

*Please select all that apply*

For the manufacturing process which is essential to the running of your organisation (e.g. to power machinery, agricultural production etc)

For the supply of services your organisation provides (e.g. cleaning services etc)

For an ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)

None of the above

Don't Know

---

Q78. How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250+

Prefer not to say

---

Q79. How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

---

Q80. Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities

Professional, scientific and technical activities

Administrative and Support Service Activities

Public administration and defence

Education

Human health and social work activities

Arts, entertainment and recreation

Other service activities

Other (please specify)

Prefer not to say

## Final Questions

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Q81. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email.  
Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS

M&S Voucher by email COLLECT EMAIL ADDRESS

One4All by email COLLECT EMAIL ADDRESS

Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

---

Q82. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

---

Q83. **[CATI ONLY]** Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes

No

---

Q84. **[IF HH]** Cambridge Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here: <https://www.cambridge-water.co.uk/household/extra-help/help-with-paying>

## South Staffs Water – H2Online Questionnaire

Thank you very much for agreeing to complete this [IF ONLINE] on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help South Staffs Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone completing the survey in full will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

**IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.**

### About you

Q85. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

---

Q86. **IF HH:** Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

---

Q87. **IF HH:** How old are you? Please enter your age.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Prefer not to say **THANK AND CLOSE**

**CODE AS** Under 18 **THANK AND CLOSE**

18-24  
25-34  
35-44  
45-54  
55-64  
65-74  
75+

---

Q88. **IF HH:** Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes  
No, I am not responsible for paying the bill **THANK AND CLOSE**  
Don't know **THANK AND CLOSE**

---

Q89. Do you have a water meter at **[IF HH]** your home **[IF NHH]** your business/organisation?

Yes  
No  
Don't know

---

Q90. South Staffs Water is your water supplier, and Severn Trent Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**  
No **THANK AND CLOSE**  
Don't know **GO TO MAIN QUESTIONNAIRE**

---

**Q6b** Please tell us how much you pay for your total water and sewerage bill – that's the total bill paid to both South Staffs Water and Severn Trent Water. Please provide the amount you think you have paid over the last 12 months.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Don't know

---

**Q6c** Please tell us how much you pay for your total clean water bill – that's the total bill paid just to South Staffs Water. Please provide the amount you think you have paid over the last 12 months.

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Don't know

---

Q91. **IF NHH:** Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes  
No **THANK AND CLOSE**

---

Q92. **IF NHH:** Is South Staffs Water responsible for the water services at your organisation?

Yes  
No **THANK AND CLOSE**  
Don't know **THANK AND CLOSE**

---

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the South Staffs Water area. Is that OK?

Yes  
No **THANK AND CLOSE**

## Main Questionnaire

Thank you, **[IF CATI]** I **[IF ONLINE]** we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

**[ONLINE ONLY]:** For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

## Affordability

We are now going to ask you some questions about your **[IF HH]** household's/**[IF NHH]** organisation's financial situation.

---

Q93. Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

All of the time  
Most of the time  
Sometimes  
Rarely  
Never  
Prefer not to say

---

Q94. Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

**[IF HH]** Living/**[IF NHH]** Operating comfortably  
Doing alright  
Just about getting by  
Finding it quite difficult  
Finding it very difficult  
Prefer not to say

---

Q95. Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*  
A lot worse  
A bit worse  
Stay the same



A bit better  
A lot better  
Prefer not to say  
Don't know

---

Q96. **IF NHH:** How much are you currently paying for your water and sewerage services bill, **each year?**

[Open-ended answer] **DP PLEASE ADD TEXT BOX**  
Don't know

---

Q97. **[IF HH]** Your current water and sewerage services bill is #insert from sample# **[all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

*Please select one answer only*  
Very easy  
Fairly easy  
Neither easy nor difficult  
Fairly difficult  
Very difficult  
Don't know

---

Q13a. **[CATI ONLY] IF NHH:** At this point I need you to look at this chart which shows what your organisation's future water bills may look like under the plans South Staffs Water have

Please could you go to **LINK TBC**

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the South Staffs Water area. An estimate is absolutely fine.

**Interviewer note:** do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page  
Cannot proceed now **Open appointment box**

**Proposed changes to your water/sewerage bill for the years 2025-2030.**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

**Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

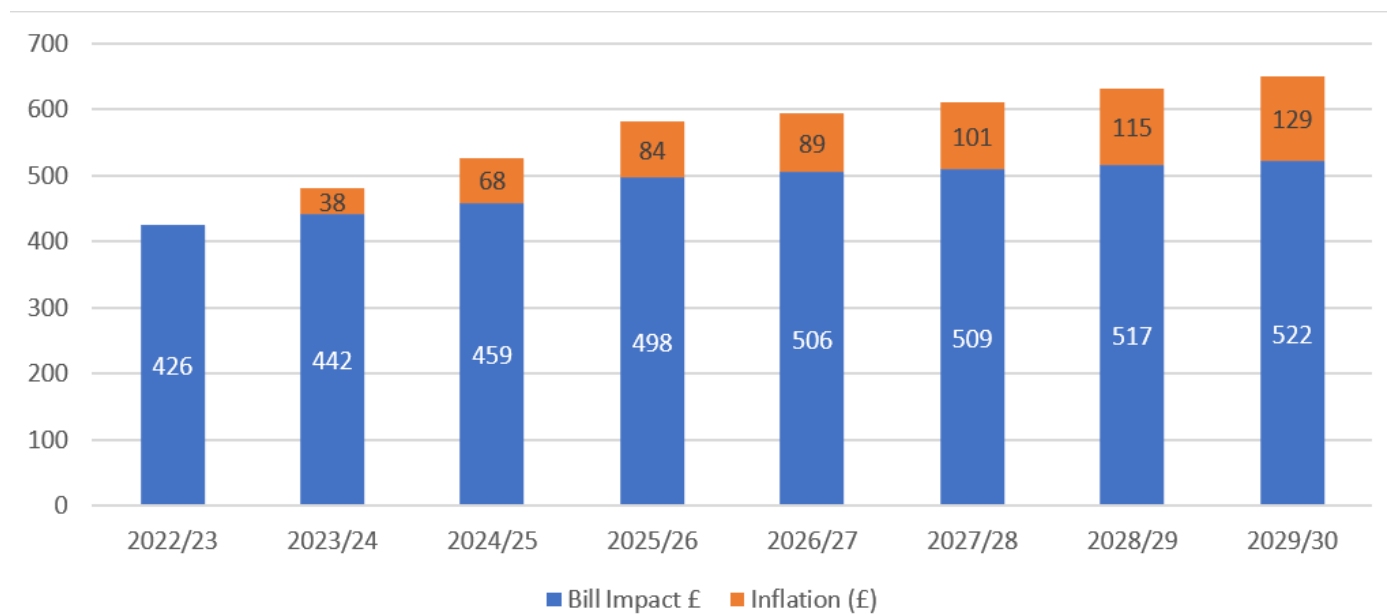
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water and sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**



**(Placeholder – this graph will be tailored according to bill amounts)**

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\SSW Bill Increase Graph calculator.xlsx>

USING SSW TAB

FOR DON'T KNOW USE £350.66

---

Q98. How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult **HH ONLY GO TO Q15**
- Fairly difficult **HH ONLY GO TO Q15**
- Very difficult **HH ONLY GO TO Q15**
- Don't know

---

Q99. **[IF HH ONLY] IF Q14= 3,4,5** Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Shopping around more
- Spending less on food shopping and essentials
- Spending less on non-essentials
- Cutting back on non-essential journeys in my vehicle
- Eat out less
- Using less fuel such as gas or electricity in my home
- Using less water
- Using my savings
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Ask family and friends for financial support
- Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**
- Don't know

## South Staffs Water's Plans

### **PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that South Staffs Water supplies.

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that South Staffs Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Severn Trent Water.

[If HH show Slide 10]

## About South Staffs Water



Around 1.7 million people depend on South Staffs Water and Cambridge Water. The amount of water they use every day is the same as **two million full baths**

- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

[If NHH show Slide 11]

## About South Staffs Water



Around 1.7 million people depend on South Staffs Water and Cambridge Water. The amount of water they use every day is the same as **two million full baths**

- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a business customer, you **can** choose which company sends you your water bills, handles any customer service queries and reads your meter. You can't choose which company supplies your clean water to your taps
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. South Staffs Water only provides water services to customers, and so that graph included costs for waste services that South Staffs do not provide and cannot control.

[If HH] For context, the typical annual household bill for the clean water services that South Staffs Water provides is expected to increase from **£174** in 2023/24 to **£228** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

[IF NHH] For context, the typical annual business customer bill for the clean water services that South Staffs Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

**Q100. Water Supply Interruptions (please do not show Q title in script)**

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how South Staffs Water is performing in the area of “Water Supply Interruptions”, against both their target and also the other water companies.

[INSERT SLIDE 1]

**Supply interruptions: the average length of time properties are without water**


**More about supply interruptions**

If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Performance is measured by: **Duration without water for more than 3 hours by minutes per property**  
Companies with the lowest numbers in the table are performing **better**



South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **4<sup>th</sup> of 19** companies on this measure



Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
<b>South Staffs &amp; Cambridge</b>	<b>00:03:15</b>
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

**Better performance**

**Poorer performance**

The following slide shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 2]

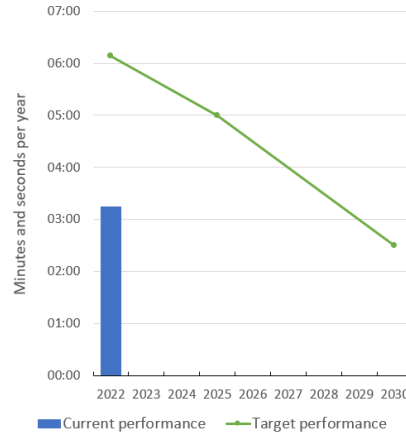
## Supply interruptions: the average length of time properties are without water

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

### What South Staffs Water plan to do and the benefits this will bring

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to 2 minutes and 30 seconds per property by 2030.

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



Duration for more than 3 hours without water. A lower number is better.

## Q101. Leakages (please do not show Q title in script)

PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following chart shows how South Staffs Water is performing in the area of “Leakages”, against both their target and also the other water companies.

[INSERT SLIDE 5]

## Leaks: The amount of water lost due to leaks from water mains and pipes

**More about leakage**

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Performance is measured by: **Leakage per property served per day**  
Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **14<sup>th</sup> of 19** companies on this measure

Company	Performance (litres per property per day)
Bristol	65
Essex and Suffolk	76
Portsmouth	77
SES Water	79
Anglian	80
Southern	83
South East	88
Cambridge	91
Wessex	103
South West	108
Northumbrian	108
Affinity	109
Severn Trent	110
<b>South Staffs</b>	<b>113</b>
Yorkshire	123
United Utilities	124
Hafren Dyfrdwy	146
Thames	152
Welsh Water	159

Better performance

Poorer performance

The following chart shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 6]

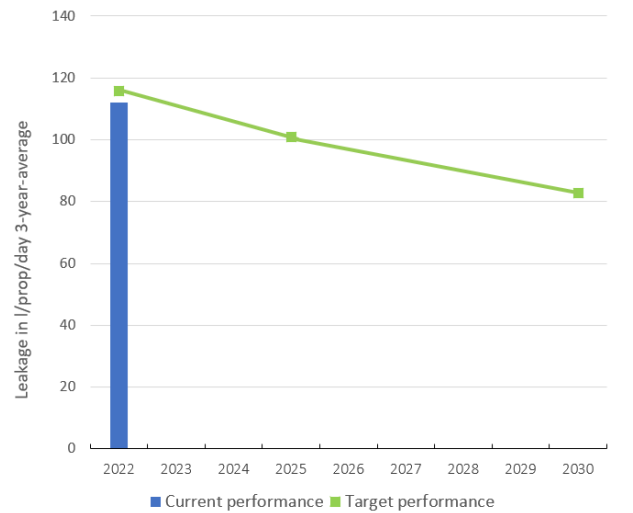
## Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in millions of litres) due to leaks from water mains and pipes.

### What South Staffs Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to 82 litres per property per day by 2030
- And then to reduce leakage by 50% to meet the 2050 national target, from 2017/18 levels.

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



Amount of water lost from pipes, expressed per property per day, in litres. A lower number is better.

## Q102. Water Quality Contacts (please do not show Q title in script)

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The following chart shows how South Staffs Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

**[INSERT SLIDE 3]**

### Water Quality: Appearance, taste and smell of tap water

#### More about water quality



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Performance is measured by: **Number of customer contacts received regarding incidents, per 1,000 population**  
Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **5<sup>th</sup>** of **19** companies on this measure

Company	Performance (number of contacts)		
Portsmouth	0.41	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">Better performance</div> <div style="flex-grow: 1;"> <div style="border-left: 2px solid green; height: 100%;"></div> <div style="border-left: 2px solid red; height: 100%;"></div> </div> <div style="margin-left: 10px;"> <div style="color: green; font-size: 2em;">↑</div> <div style="color: red; font-size: 2em;">↓</div> </div> </div>	
Thames	0.49		
SES Water	0.58		
Affinity	0.73		
<b>South Staffs &amp; Cambridge</b>	<b>0.76</b>		
Severn Trent	0.93		
Northumbrian	0.97		
Anglian	1.03		
Yorkshire	1.09		
Southern	1.1		
Wessex	1.17		
South East	1.34		
Bristol	1.38		
South West	1.55		
Hafren Dyfrdwy	1.71		
United Utilities	1.79		
Welsh Water	2.38		
			Poorer performance

The following chart shows what South Staffs Water is proposing to do to improve its performance:

[INSERT SLIDE 4]

## Water Quality: Appearance, taste and smell of tap water

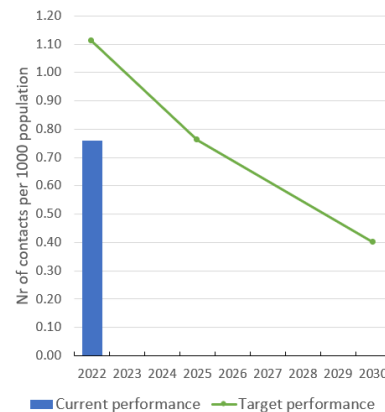
Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

### What South Staffs Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000 population** by 2030.

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. A lower number is better.

Q103. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

## South Staffs Water's Plans – Key Investment Areas

**PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

The next section will show you three of the important areas of investment in South Staffs Water's business plan before asking for your views on the plan as a whole.

Q104. The following slide describes one of the key investment areas of South Staffs Water's business plan:


[INSERT SLIDE 7 – HAS HOVER BUTTON]



## Protect and restore the environment

### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 19% by 2045 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use and help spot leaks faster. To avoid increased bills when moving onto a metred supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18
- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored in the Cambridge region



£

Investment

**To make these investments  
will cost £97 million  
between 2025 and 2030**

**That's £10.20 more on the  
typical annual bill for  
household customers.**

**[Hover text]:** The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.

---

### Q105. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN


The following slide describes one of the key investment areas of South Staffs Water's business plan:

**[INSERT SLIDE 8 – HAS HOVER BUTTON]**

## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£12m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£5m to improve the filtration** process at water treatment sites - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as nurseries and schools.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.



**To make these investments will cost £24 million between 2025 and 2030**

**That's £2.50 more on the typical annual bill for household customers.**

**[Hover text]:** Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

---

## Q106. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN

The following slide describes one of the key investment areas of South Staffs Water's business plan:

**[INSERT SLIDE 9]**

### Increasing resilience of the water network

#### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

#### Key Investments by South Staffs Water and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£8m to lay more pipes** – increases the flow around the network in the event of pipes failing
- **£4m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).



**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical annual bill for household customers.**

---

Q107. Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Protect and improve the environment  
Improve water quality  
Increasing resilience of the water network  
Don't know/can't say

---

Q108. Based on everything you have seen and read about South Staffs Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

*Please select one answer only*

Completely acceptable **GO TO Q2626**  
Acceptable **GO TO Q2626**  
Unacceptable **GO TO Q2525**  
Completely unacceptable **GO TO Q2525**  
Don't know/can't say

---

Q109. **IF Q244=3 or 4** What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The bill increases are too expensive  
Company profits are too high  
Companies should pay for service improvements  
I expect better service improvements  
The plan is poor value for money  
Compared to energy prices it is more expensive  
I am dissatisfied with current services  
The plans don't focus on the right services  
I won't be able to afford this  
I don't trust them to make these service improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

Q110. **IF Q244=1 OR 2** What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

*Please choose up to two answers only*

The plan is good value for money  
The plan is affordable  
Compared to energy prices it's cheaper  
Their plans seem to focus on the right services  
The company provides a good service now  
I support what they are trying to do in the long term  
The change to my bill is small  
I trust them to do what's best for customers  
I have been dissatisfied with the service recently but am pleased that they are making improvements  
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**  
Don't know/ can't say

---

**Q111. PN: PLEASE ADD A 7 SECONDS DELAY TO THIS SCREEN**

Long term investment by South Staffs Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

*Please select one answer only*

An increase in bills starting sooner, spreading increases across different generations of bill-payers  
An increase in bills starting later, putting more of the increases onto younger and future bill-payers  
I don't know enough at the moment to give an answer

The chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about South Staffs Water's plans for 2025-2030.

INSERT WATER ONLY BILL.

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\SSW Bill Increase Graph calculator.xlsx>

USING sswwo TAB

FOR DON'T KNOW USE £159.66

---

**Q27a** How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

## Your views about water

---

**Q27b** How strongly do you agree/disagree with the following:

**ROTATE**

**RESPONSE CODES 1=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDED DON'T KNOW**

I am concerned about the quality of the drinking water I receive at my home  
I would be willing to change my daily habits to reduce my water usage  
My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere  
I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill  
I'm concerned about the quality of water in the rivers, streams or lakes in our local area

It's important that my water company deals efficiently and quickly with customer service queries  
Companies should contribute towards the wellbeing of the communities they serve  
We should pay more for products/services that are environmentally friendly

**Q27c** **[IF HH]** How strongly do you agree or disagree with how the following statements apply to you and your life generally:  
**1=STRONGLY DISAGREE/10=STRONGLY AGREE**

I am conscious of the world around me and think we all need to look after it for future generations  
Water is a precious resource and I'm careful about how much I use  
I'm prepared to switch suppliers (e.g gas/electricity, insurance) every year to get the best price

**Q27d** **[IF HH]** Which one of the following statements most closely applies to your use of water in your household?

I/We don't know how much we use, and I/we don't think about it  
I/We don't know how much we use, but I/we are conscious about it  
I/We're careful about how much we use because I/we want to keep our bill down  
I/We're careful about how much we use because I/we don't think we should waste water

**Q27e** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

**ROTATE**

Happy  
Depressed  
Stressed  
Optimistic  
Positive  
Worried  
Energetic  
Tired  
Other (please specify)  
Prefer not to say **DO NOT ROTATE**  
Don't know **DO NOT ROTATE**

**Q27f** Based on what you have read about South Staffs Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?  
[Open-ended answer] **DP PLEASE ADD TEXT BOX**

## **HH ONLY:** Household Demographics

**Q112.** Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?  
Female  
Male  
I identify in another way  
Prefer not to say

---

**Q113.** Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed

please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**High managerial, administrative or professional** e.g. doctor, lawyer, medium/large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife/Househusband

Unemployed

Retired **GO TO Q3030**

Student

Prefer not to say

---

Q114. **IF Error! Reference source not found.29=RETIRED ASK** Does the main income earner have a state pension, a private pension or both?

State only

Private only **GO TO Q3031**

Both **GO TO Q3031**

Prefer not to say

---

Q115. **IF Q3030= PRIVATE OR BOTH ASK:** How would you describe the main income earner's occupation type before retirement?

**High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)

**Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant

**Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed

**Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

**Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer

Housewife / househusband

Unemployed

Student

None of these

Prefer not to say

---

Q116. Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion. **MULTICODE**

*Please select all that apply*

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**



I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**  
None of these apply to me  
Prefer not to say

---

Q117. What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

*Please select one answer only*

**WHITE**

English, Welsh, Scottish, Northern Irish or British  
Irish  
Gypsy or Irish Traveller  
Any other White background

**MIXED**

White and Black Caribbean  
White and Black African  
White and Asian  
Any other Mixed background

**ASIAN OR ASIAN BRITISH**

Indian  
Pakistani  
Bangladeshi  
Chinese  
Any other Asian background

**BLACK OR BLACK BRITISH**

Caribbean  
African  
Any other Black background

**OTHER ETHNIC GROUP**

Arab  
Any other ethnic group  
Prefer not to say

---

Q118. Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year  
From £200 to £299 a week/From £10,400 to £15,599 a year  
From £300 to £499 a week/From £15,600 to £25,999 a year  
From £500 to £699 a week/From £26,000 to £36,399 a year  
From £700 to £999 a week/From £36,400 to £51,999 a year  
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year  
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year  
£2,000 and above a week/£104,000 and above a Year

Don't know  
Prefer not to say

**GO TO Q3939**

---

## **NHH only:** Non-Household Demographics

Q119. How does your organisation mainly use water at its premises? **MULTICODE**

*Please select all that apply*

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)

For the supply of services your organisation provides (eg cleaning services etc)  
For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)  
For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)  
None of the above  
Don't Know

---

Q120. How many sites in the UK does your organisation operate from?

1  
2  
3  
4  
5-10  
11-50  
51-250  
250+  
Prefer not to say

---

Q121. How many employees does your organisation have in the UK?

0 (sole trader)  
1 to 9 employees (micro)  
10 to 49 employees (small)  
50 to 249 employees (medium)  
250+ employees (large)  
Prefer not to say

---

Q122. Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing  
Mining and quarrying  
Energy or water service & supply  
Manufacturing  
Construction  
Wholesale and retail trade (including motor vehicles repair)  
Transport and storage  
Hotels & catering  
IT and Communication  
Finance and insurance activities  
Real estate activities  
Professional, scientific and technical activities  
Administrative and Support Service Activities  
Public administration and defence  
Education  
Human health and social work activities  
Arts, entertainment and recreation  
Other service activities  
Other (please specify)  
Prefer not to say

## Final Questions

---

Q123. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.



This can be sent as an Amazon, Marks & Spencer or One4All voucher by email.  
Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS

M&S Voucher by email COLLECT EMAIL ADDRESS

One4All by email COLLECT EMAIL ADDRESS

Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

---

Q124. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

---

Q125. **[CATI ONLY]** Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes

No

---

Q126. **[IF HH]** South Staffs Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here: <https://www.south-staffs-water.co.uk/household/extra-help/help-with-paying>

# APPENDIX F

Questionnaire (Paper version)

Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help Cambridge Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

**Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **8<sup>th</sup> September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

When completing the survey please start from Question 1 (Q1) in the 'About you' section.

If at any point in the 'About you' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the 'About you' section without that message appearing next to any of your answers please go to the "Main questionnaire" and follow the questionnaire order.

## About you

Q1. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q2. Do you or any of your close family work in market research or for a water company?

- Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**
- No

---

Q3. How old are you? Please enter your age.

Please enter your age on the line below

- Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**
- Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q4. Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

- Yes
- No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**
- Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q5. Do you have a water meter at your home?

- Yes
- No
- Don't know

---

Q6. Cambridge Water is your water supplier, and Anglian Water is responsible for your sewerage services. Does this sound right?

- Yes
- No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**
- Don't know

**Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.**

## Main Questionnaire

### Affordability

We are now going to ask you some questions about your household's financial situation.

---

Q7. Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

***Please select one answer only***

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

---

Q8. Overall, how well would you say you are managing financially now?

***Please select one answer only***

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

---

Q9. Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

***Please select one answer only***

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

---

Q10. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

## Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

**Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

Once you have read the above, and referred to the chart on the following page, please continue.

HOLDING PAGE FOR GRAPH

---

Q11. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

***Please select one answer only***

- Very easy **Please skip question 12**
- Fairly easy **Please skip question 12**
- Neither easy nor difficult **Please go to Question 12**
- Fairly difficult **Please go to Question 12**
- Very difficult **Please go to Question 12**
- Don't know

---

Q12. **Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)**

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

***Please select all that apply***

- Shopping around more
  - Spending less on food shopping and essentials
  - Spending less on non-essentials
  - Cutting back on non-essential journeys in my vehicle
  - Eat out less
  - Using less fuel such as gas or electricity in my home
  - Using less water
  - Using my savings
  - Using credit more than usual, for example, credit cards, loans or overdrafts
  - Ask family and friends for financial support
  - Other, please specify:
- 
- Don't know

## Cambridge Water's Plans

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that Cambridge Water supplies.

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that Cambridge Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Anglian Water.

## About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as **two million full baths**

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. Cambridge Water only provides water services to customers, and so that graph included costs for waste services that Cambridge Water do not provide and cannot control.

For context, the typical annual household bill for the clean water services that Cambridge Water provides is expected to increase from **£167** in 2023/24 to **£218** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

### Q13. Water Supply Interruptions

The following table shows how Cambridge Water is performing in the area of

#### Supply interruptions: the average length of time properties are without water

##### More about supply interruptions



If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Performance is measured by: **Duration without water for more than 3 hours, by minutes per property**  
Companies with the lowest numbers in the table are performing **better**

Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **4<sup>th</sup>** of 19 companies on this measure

Company	Performance (number of minutes over 3 hours)
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
<b>South Staffs &amp; Cambridge</b>	<b>00:03:15</b>
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance



Poorer performance





“Water Supply Interruptions”, against both their target and also the other water companies.

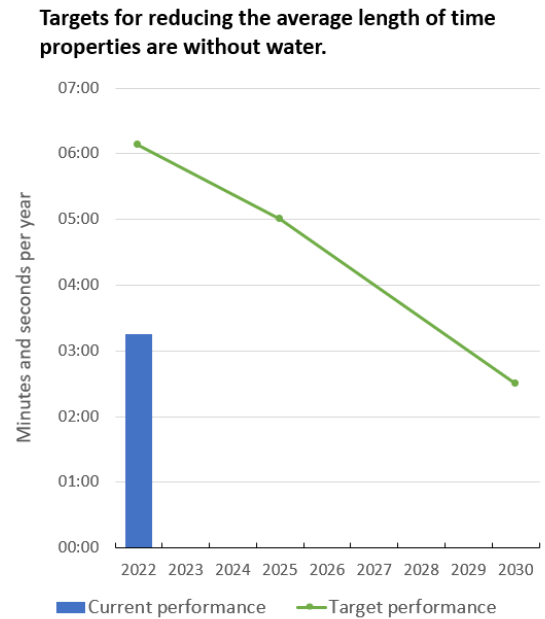
The following chart shows what Cambridge Water is proposing to do to improve its

## Supply interruptions: the average length of time properties are without water

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

### What Cambridge Water plan to do and the benefits this will bring

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to 2 minutes and 30 seconds per property by 2030.



Duration for more than 3 hours without water. A lower number is better.

performance:

### Q14. Leakages

The following table shows how Cambridge Water is performing in the area of “Leakages”, against both their target and also the other water companies.

## Leaks: The amount of water lost due to leaks from water mains and pipes

### More about leakage



Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Performance is measured by: **Leakage per property served per day**  
Companies with the lowest numbers in the table are performing **better**

Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **8<sup>th</sup>** of 19 companies on this measure

Company	Performance (litres per day)
Bristol	65
Essex and Suffolk	76
Portsmouth	77
SES Water	79
Anglian	80
Southern	83
South East	88
<b>Cambridge</b>	<b>91</b>
Wessex	103
South West	108
Northumbrian	108
Affinity	109
Severn Trent	110
South Staffs	113
Yorkshire	123
United Utilities	124
Hafren Dyfrdwy	146
Thames	152
Welsh Water	159

Better performance



Poorer performance



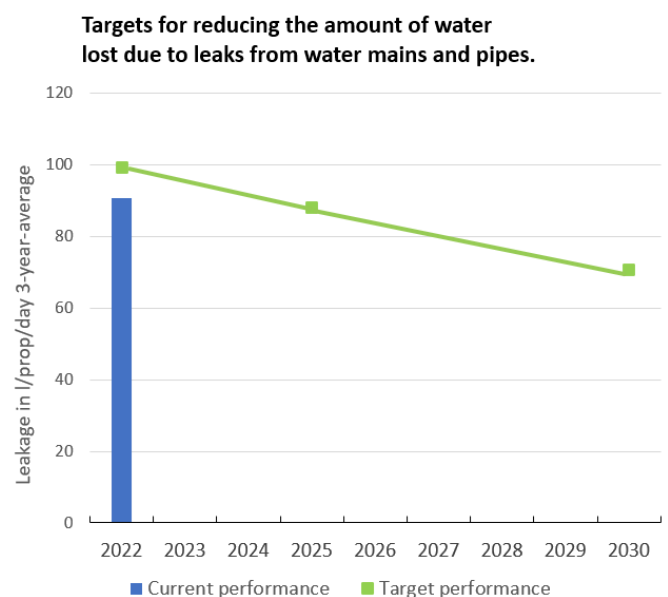
The following chart shows what Cambridge Water is proposing to do to improve its performance:

## Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in litres) due to leaks from water mains and pipes.

### What Cambridge Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to 71 litres per property per day by 2030
- And then to reduce leakage by 50% to meet the 2050 national target, from 2017/18 levels.



Amount of water lost from pipes, expressed per property per day, in litres. **A lower number is better.**

---

### Q15. Water Quality Contacts

The following table shows how Cambridge Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

The following chart shows what Cambridge Water is proposing to do to improve its

## Water Quality: Appearance, taste and smell of tap water

Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

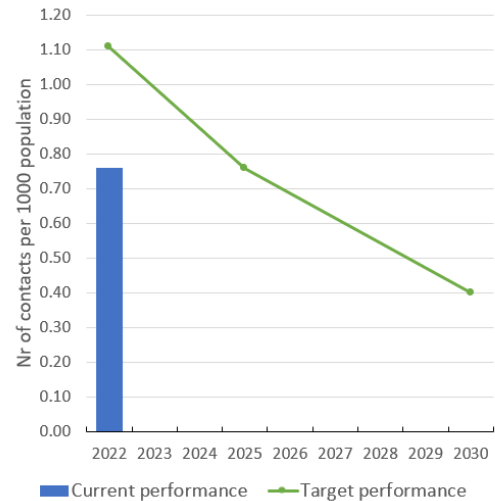
### What Cambridge Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000** population by 2030.

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

performance:

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. **A lower number is better.**

**Q16.** Based on what you have just read, which of these three parts of the business plan is the most important to you?

**Please select one answer only**

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

## Cambridge Water's Plans – Key Investment Areas

**Q17.** The following text describes one of the key investment areas of Cambridge Water's business plan:

## Protect and restore the environment

### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 31% between 2020 and 2050 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions.

### What Cambridge Water plan to do and the benefits this will bring

- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored
- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use, and help spot leaks faster. To avoid increased bills when moving onto a metered supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18

The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.

---

**Q18.** The following text describes one of the key investment areas of Cambridge

## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers.

### What Cambridge Water plan to do and the benefits this will bring

- **£13m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£4m to improve the filtration process at water treatment sites** - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as schools and care homes.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.

Water's business plan:



Investment

**To make these investments  
will cost £97 million between  
2025 and 2030**

**That's £10.20 more on the  
typical bill for household  
customers.**



Investment

**To make these investments  
will cost £24 million between  
2025 and 2030**

**That's £2.50 more on the  
typical bill for household  
customers.**

Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

---

**Q19.** The following text describes one of the key investment areas of Cambridge Water's business plan:

## Increasing resilience of the water network

### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

### What Cambridge Water plan to do and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£9m to lay more pipes** – increases the flow of water around the network in the event of pipes failing
- **£3m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).



£  
Investment

**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical bill for household customers.**

---

**Q20.** Based on what you have just read, which of these three parts of the business plan is the most important to you?

**Please select one answer only**

- Protect and improve the environment
- Improve water quality
- Increasing resilience of the water network
- Don't know/can't say

---

**Q21.** Based on everything you have seen and read about Cambridge Water's proposed business plan, how acceptable or unacceptable is it to you?

**Please select one answer only**

- Completely acceptable **Please go to Question Q23**
- Acceptable **Please go to Question Q23**
- Unacceptable **Please go to Question Q22**
- Completely unacceptable **Please go to Question Q22**
- Don't know/can't say

---

**Q22. Answer if you selected "Unacceptable" or "Completely unacceptable" at question 21 (Q21 above)**

What are the two main reasons that you feel the proposals for your water services are unacceptable?



***Please choose up to two answers only***

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q23. Answer if you selected "Acceptable" or "Completely" acceptable at question 21 (Q21 above)**

What are the two main reasons that you feel the proposals for your water supply are acceptable?

***Please choose up to two answers only***

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q24. Long term investment by Cambridge Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?**

***Please select one answer only***

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

As you saw previously, this chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about Cambridge Water's plans for 2025-2030.

Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

Once you have read the above, and referred to the chart on the following page, please continue.

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**Q25** How easy or difficult do you think it would be for you to afford these water bills?

*Please select one answer only*

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

## Your views about water

---

**Q26** How strongly do you agree/disagree with the following:

*Please select one answer only for each of the following statements*

**1 = Strongly disagree to 10 = Strongly agree**

I am concerned about the quality of the drinking water I receive at my home

1  2  3  4  5  6  7  8  9  10

I would be willing to change my daily habits to reduce my water usage

1  2  3  4  5  6  7  8  9  10

My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere

1  2  3  4  5  6  7  8  9  10

I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill

1  2  3  4  5  6  7  8  9  10

I'm concerned about the quality of water in the rivers, streams or lakes in our local area

1  2  3  4  5  6  7  8  9  10

It's important that my water company deals efficiently and quickly with customer service queries

1  2  3  4  5  6  7  8  9  10

Companies should contribute towards the wellbeing of the communities they serve

1  2  3  4  5  6  7  8  9  10

We should pay more for products/services that are environmentally friendly

1  2  3  4  5  6  7  8  9  10

---

**Q27** How strongly do you agree or disagree with how the following statements apply to you and your life generally:

*Please select one answer only for each of the following statements*

**1 = Strongly disagree to 10 = Strongly agree**

I am conscious of the world around me and think we all need to look after it for future generations

1  2  3  4  5  6  7  8  9  10

Water is a precious resource and I'm careful about how much I use

1  2  3  4  5  6  7  8  9  10

I'm prepared to switch suppliers (e.g gas/electricity, insurance) every year to get the best price

1  2  3  4  5  6  7  8  9  10

---

**Q28** Which one of the following statements most closely applies to your use of water in your household?

- I/We don't know how much we use, and I/we don't think about it
- I/We don't know how much we use, but I/we are conscious about it
- I/We're careful about how much we use because I/we want to keep our bill down
- I/We're careful about how much we use because I/we don't think we should waste water

---

**Q29** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment?

*Please select all that apply*

- Happy
- Depressed
- Stressed
- Optimistic
- Positive
- Worried
- Energetic
- Tired
- Other, please specify

---

Prefer not to say

Don't know

---

**Q30** Based on what you have read about Cambridge Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?

*Please use the textbox below*

## Household Demographics

**Q31** Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

**Please select one answer only**

- Female
- Male
- I identify in another way
- Prefer not to say

---

**Q32** Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**Please select one answer only**

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q33**
- Student
- Prefer not to say

---

**Q33** **Answer if you have selected “retired” at question 32 (Q32 above)**  
Does the main income earner have a state pension, a private pension or both?

**Please select one answer only**

- State only
- Private only **Please go to Question Q34**
- Both **Please go to Question Q34**
- Prefer not to say

---

**Q34** **Answer if you have selected “private only” or “both” at question 33 (Q33 above)**

How would you describe the main income earner’s occupation type before retirement?

**Please select one answer only**

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed

- Student
- None of these
- Prefer not to say

---

**Q35** Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion.

***Please select all that apply***

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

---

**Q36** What is your ethnic group? Choose one option that best describes your ethnic group or background

***Please select one answer only***

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**OTHER ETHNIC GROUP**

- Arab
- Any other ethnic group
- Prefer not to say

---

**Q37** Which of the following bands does your household income fall into from all sources, before tax and other deductions?

***Please select one answer only***

- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

## Final Questions

---

**Q38** We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

---

**Q39** Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

- Yes
- No

---

**Q40** Would you like to join Cambridge Water's online community, called H<sub>2</sub>Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*

- Yes
- No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with Cambridge Water to send you an invite. This will be held securely and will only be used to invite you to join the online community in the coming days.

---

Cambridge Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.cambridge-water.co.uk/household/extra-help/help-with-paying>

Thank you for taking part, your feedback will help Cambridge Water to finalise its business plan. This research was conducted under the terms of the MRS code of conduct and is completely confidential.



Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help South Staffs Water, your water service provider, to understand your views on how affordable and acceptable its future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

**Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher** (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **8<sup>th</sup> September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you can stop taking part at any point.

When completing the survey please start from Question 1 (Q1) in the 'About You' section.

If at any point in the 'About You' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this

survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the ‘About you’ section without that message appearing next to any of your answers please go to the “Main questionnaire” and follow the questionnaire order.

## About you

Q1. Any data collected over the course of this survey that could be used to identify you, such as your name or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q2. Do you or any of your close family work in market research or for a water company?

Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

No

---

Q3. How old are you? Please enter your age.

Please enter your age on the line below

Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q4. Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

---

Q5. Do you have a water meter at your home?

Yes

No

Don't know

- 
- Q6. South Staffs Water is your water supplier, and Severn Trent Water is responsible for your sewerage services. Does this sound right?
- Yes
  - No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**
  - Don't know

**Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.**

## Main Questionnaire

### Affordability

- 
- Q7. Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

***Please select one answer only***

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

- 
- Q8. Overall, how well would you say you are managing financially now?

***Please select one answer only***

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

- 
- Q9. Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

***Please select one answer only***

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

- 
- Q10. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

***Please select one answer only***

- Very easy
- Fairly easy



- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

## Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

### **Water bills change each year in line with inflation.**

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (i.e. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

Once you have read the above, and referred to the chart on the following page, please continue.

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Q11. How easy or difficult do you think it would be for you to afford these water/sewerage bills?

***Please select one answer only***

- Very easy **Please skip question 12**
- Fairly easy **Please skip question 12**
- Neither easy nor difficult **Please go to Question 12**
- Fairly difficult **Please go to Question 12**
- Very difficult **Please go to Question 12**
- Don't know

---

Q12. **Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)**

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

***Please select all that apply***

- Shopping around more
  - Spending less on food shopping and essentials
  - Spending less on non-essentials
  - Cutting back on non-essential journeys in my vehicle
  - Eat out less
  - Using less fuel such as gas or electricity in my home
  - Using less water
  - Using my savings
  - Using credit more than usual, for example, credit cards, loans or overdrafts
  - Ask family and friends for financial support
  - Other, please specify:
- 
- Don't know

## South Staffs Water's Plans

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only, that is the services that South Staffs Water supplies.**

Before we show you the company's plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that South Staffs Water only supplies clean water services (that's the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Severn Trent Water.

## About South Staffs Water



Around 1.7 million people depend on South Staffs Water and Cambridge Water. The amount of water they use every day is the same as **two million full baths**

- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day. Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and over 20 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

---

Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. South Staffs Water only provides water services to customers, and so that graph included costs for waste services that South Staffs do not provide and cannot control.

For context, the typical annual household bill for the clean water services that South Staffs Water provides is expected to increase from **£174** in 2023/24 to **£228** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

---

### Q13. Water Supply Interruptions

The following table shows how South Staffs Water is performing in the area of “Water Supply Interruptions”, against both their target and also the other water

### Supply interruptions: the average length of time properties are without water

#### More about supply interruptions



If a water supply is interrupted without warning for more than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Performance is measured by: **Duration without water for more than 3 hours by minutes per property**

Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **4<sup>th</sup> of 19** companies on this measure

Company	Performance (number of minutes over 3 hours)	Better performance	
Portsmouth	00:02:21		
Bristol	00:02:31		
SES Water	00:02:58		
<b>South Staffs &amp; Cambridge</b>	<b>00:03:15</b>		
Affinity	00:03:43		
Wessex	00:04:12		
United Utilities	00:07:58		
Southern	00:09:22		
Anglian	00:09:48		
Yorkshire	00:10:38		
Thames	00:11:03		
Northumbrian	00:11:45		
Severn Trent	00:12:39		
South West	00:13:40		
Welsh Water	00:16:12		
Hafren Dyfrdwy	00:37:28		
South East	01:12:33		
			Poorer performance

companies.

The following chart shows what South Staffs Water is proposing to do to improve its performance:

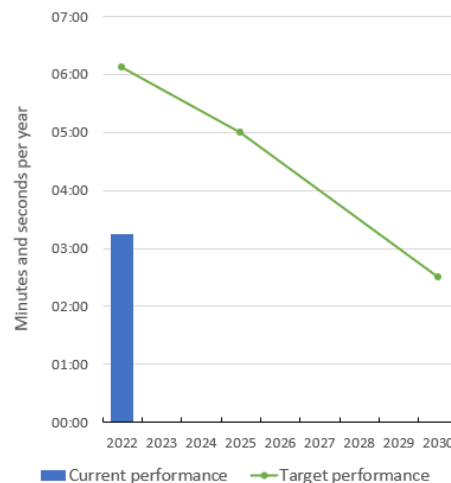
### Supply interruptions: the average length of time properties are without water

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

#### What South Staffs Water plan to do and the benefits this will bring

- Invest more in its pipe networks and new technology to improve real time intelligence. This enables quicker reaction times - e.g. identifying failures before they happen
- Maintain its “top 4” water industry performance position, in at least 4 of the years between 2020-2025.
- Reduce length of time properties are without water to **2 minutes and 30 seconds per property by 2030.**

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

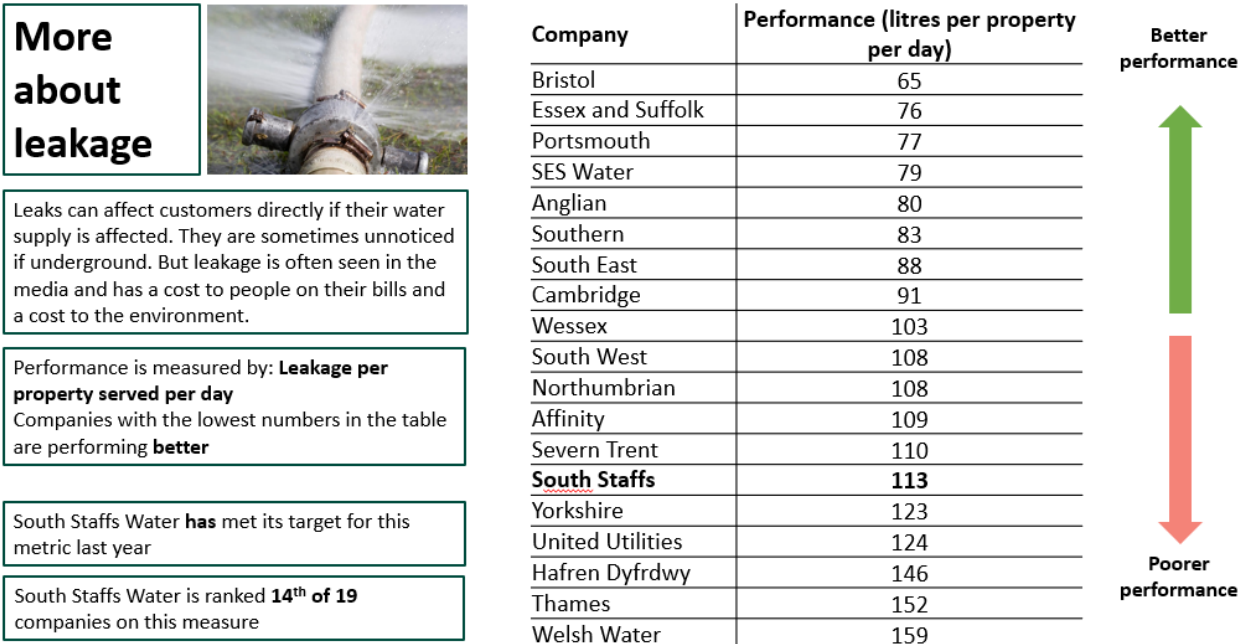


Duration for more than 3 hours without water. **A lower number is better.**

## Q14. Leakages

The following table shows how South Staffs Water is performing in the area of “Leakages”, against both their target and also the other water companies.

### Leaks: The amount of water lost due to leaks from water mains and pipes



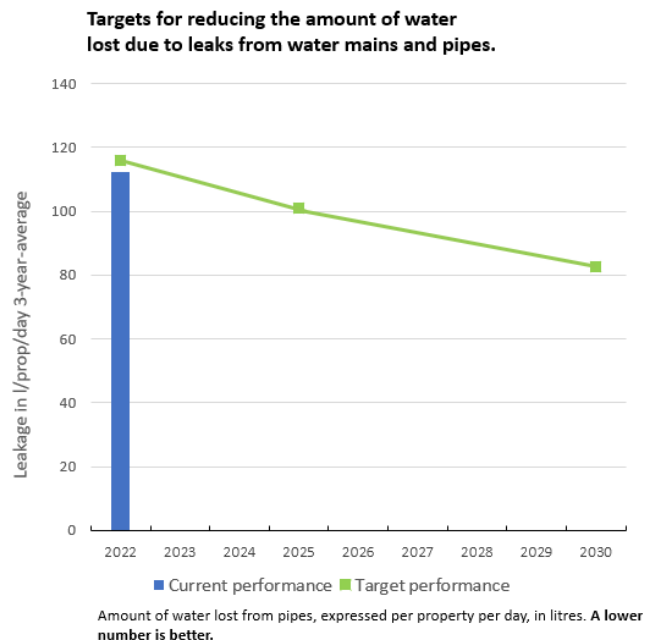
The following chart shows what South Staffs Water is proposing to do to improve its performance:

### Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in millions of litres) due to leaks from water mains and pipes.

#### What South Staffs Water plan to do and the benefits this will bring

- Quicker detection of leakage on company and customer pipes by using:
  - Advanced leakage detection techniques
  - Latest water metering technology
  - More smart sensors on the pipe network
- These investments will help ensure less water is taken from environment by reducing leakage to **82 litres per property per day by 2030**
- And then to reduce leakage by **50% to meet the 2050 national target**, from 2017/18 levels.



## Q15. Water Quality Contacts

The following table shows how South Staffs Water is performing in the area of “Water Quality Contacts”, against both their target and also the other water companies.

### Water Quality: Appearance, taste and smell of tap water

#### More about water quality





Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Performance is measured by: **Number of customer contacts received regarding incidents, per 1,000 population**  
Companies with the lowest numbers in the table are performing **better**

South Staffs Water **has** met its target for this metric last year

South Staffs Water is ranked **5<sup>th</sup> of 19** companies on this measure

Company	Performance (number of contacts)	
Portsmouth	0.41	<b>Better performance</b>   <b>Poorer performance</b>
Thames	0.49	
SES Water	0.58	
Affinity	0.73	
<b>South Staffs &amp; Cambridge</b>	<b>0.76</b>	
Severn Trent	0.93	
Northumbrian	0.97	
Anglian	1.03	
Yorkshire	1.09	
Southern	1.1	
Wessex	1.17	
South East	1.34	
Bristol	1.38	
South West	1.55	
Hafren Dyfrdwy	1.71	
United Utilities	1.79	
Welsh Water	2.38	

The following chart shows what South Staffs Water is proposing to do to improve its performance:

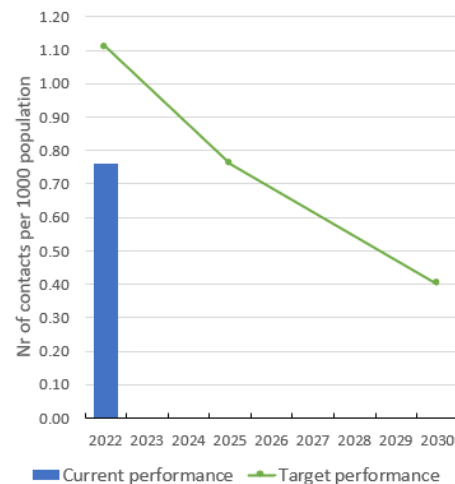
### Water Quality: Appearance, taste and smell of tap water

Chart shows the number of customer contacts received per 1,000 population about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

#### What South Staffs Water plan to do and the benefits this will bring

- Deliver largest-ever investment programme for water quality improvements
- Focus on investment in addressing risks to the colour, taste and smell of water supply
- The latest upgrades to two largest water treatment works (due for completion in 2025) will help maintain positive trend
- Reduce number of customer contacts received about water quality to **0.4 contacts per 1,000** population by 2030.

Targets for reducing the number of contacts received about water quality incidents.



Number of customer contacts received about water quality incidents, expressed per 1,000 population. **A lower number is better.**

Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

---

**Q16.** Based on what you have just read, which of these three parts of the business plan is the most important to you?

***Please select one answer only***

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

## South Staffs Water's Plans – Key Investment Areas

The next section will show you three of the important areas of investment in South Staffs Water's business plan before asking for your views on the plan as a whole.

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**Q17.** The following text describes one of the key investment areas of South Staffs Water's business plan:



## Protect and restore the environment

### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 19% by 2045 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£31m to roll out new metering technology to all customers** – providing more customers with more information on how much water they use and help spot leaks faster. To avoid increased bills when moving onto a metred supply, customers will be offered advice and support (including discounted tariffs for low-income households)
- **£16m in schemes to help restore water environments** – ensure a healthy level of water flow in rivers and streams to allow local plants, trees and wildlife to flourish
- **£6m to install solar panels and other renewables at its sites** – to reduce carbon emissions
- **£4m to reduce leakage levels quicker than required** – to meet the national target of a 50% reduction by 2050, from the leakage level in 2017/18
- **£40m to lay the preparations for new water sources** – to ensure long-term demand for water can be met and water environments, like chalk streams, can be restored in the Cambridge region

The services that water companies provide must comply with environmental laws in England and Wales, as well as UK and Welsh Government policy. Water companies have a program of work to meet these laws, which includes:

- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.


---

**Q18.** The following text describes one of the key investment areas of South Staffs

## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers. 

### Key Investments by South Staffs Water and the benefits this will bring

- **£12m to improve disinfection processes at seven sites** – includes more ultraviolet treatment equipment
- **£5m to improve the filtration process at water treatment sites** - includes mains cleaning to remove sediment build-up
- **£7m to increase the rate of lead pipe replacement from properties** – Targeting properties with more vulnerable customers - such as nurseries and schools.

Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.

Water's business plan:



**To make these investments will cost £97 million between 2025 and 2030**

**That's £10.20 more on the typical annual bill for household customers.**



**To make these investments will cost £24 million between 2025 and 2030**

**That's £2.50 more on the typical annual bill for household customers.**

Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

---

Q19. The following text describes one of the key investment areas of South Staffs

## Increasing resilience of the water network

### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

### Key Investments by South Staffs Water and the benefits this will bring

- **£10m to upgrade sites** – improves resilience to power cuts to keep the water flowing, e.g. power generators
- **£8m to lay more pipes** – increases the flow around the network in the event of pipes failing
- **£4m to install more smart sensors and technology** – identify issues before they cause the network to fail (e.g. burst pipe main).

Water's business plan:



**To make these investments will cost £22 million between 2025 and 2030**

**That's £2.30 more on the typical annual bill for household customers.**

---

Q20. Based on what you have just read, which of these three parts of the business plan is the most important to you?

**Please select one answer only**

- Protect and improve the environment
- Improve water quality
- Increasing resilience of the water network
- Don't know/can't say

---

Q21. Based on everything you have seen and read about South Staffs Water's proposed business plan, how acceptable or unacceptable is it to you?

**Please select one answer only**

- Completely acceptable **Please go to Question Q23**
- Acceptable **Please go to Question Q23**
- Unacceptable **Please go to Question Q22**
- Completely unacceptable **Please go to Question Q22**
- Don't know/can't say

---

Q22. **Answer if you selected "Unacceptable" or "Completely unacceptable" at question 21 (Q21 above)**

What are the two main reasons that you feel the proposals for your water services are unacceptable?

***Please choose up to two answers only***

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q23. Answer if you selected "Acceptable" or "Completely" acceptable at question 21 (Q21 above)**

What are the two main reasons that you feel the proposals for your water supply are acceptable?

***Please choose up to two answers only***

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

---

Other 2, please specify

---

Don't know/ can't say

---

**Q24. Long term investment by South Staffs Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?**

***Please select one answer only***

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

As you saw previously, this chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about South Staffs Water's plans for 2025-2030.

Please note that for the year 2022/23 South Staffs Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

Once you have read the above, and referred to the chart on the following page, please continue.

HOLDING PAGE FOR GRAPH

---

**Q25** How easy or difficult do you think it would be for you to afford these water bills?

*Please select one answer only*

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

## Your views about water

---

**Q26** How strongly do you agree/disagree with the following:

*Please select one answer only for each of the following statements*

**1 = Strongly disagree to 10 = Strongly agree**

I am concerned about the quality of the drinking water I receive at my home

1  2  3  4  5  6  7  8  9  10

I would be willing to change my daily habits to reduce my water usage

1  2  3  4  5  6  7  8  9  10

My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere

1  2  3  4  5  6  7  8  9  10

I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill

1  2  3  4  5  6  7  8  9  10

I'm concerned about the quality of water in the rivers, streams or lakes in our local area

1  2  3  4  5  6  7  8  9  10

It's important that my water company deals efficiently and quickly with customer service queries

1  2  3  4  5  6  7  8  9  10

Companies should contribute towards the wellbeing of the communities they serve

1  2  3  4  5  6  7  8  9  10

We should pay more for products/services that are environmentally friendly

1  2  3  4  5  6  7  8  9  10

---

**Q27** How strongly do you agree or disagree with how the following statements apply to you and your life generally:

*Please select one answer only for each of the following statements*

**1 = Strongly disagree to 10 = Strongly agree**

I am conscious of the world around me and think we all need to look after it for future generations

1  2  3  4  5  6  7  8  9  10

Water is a precious resource and I'm careful about how much I use

1  2  3  4  5  6  7  8  9  10

I'm prepared to switch suppliers (e.g. gas/electricity, insurance) every year to get the best price

1  2  3  4  5  6  7  8  9  10

---

**Q28** Which one of the following statements most closely applies to your use of water in your household?

- I/We don't know how much we use, and I/we don't think about it
- I/We don't know how much we use, but I/we are conscious about it
- I/We're careful about how much we use because I/we want to keep our bill down
- I/We're careful about how much we use because I/we don't think we should waste water

---

**Q29** Which of the following emotions best describe how you're feeling towards day-to-day life at the moment?

***Please select all that apply***

- Happy
- Depressed
- Stressed
- Optimistic
- Positive
- Worried
- Energetic
- Tired
- Other, please specify

---

Prefer not to say

Don't know

---

**Q30** Based on what you have read about South Staffs Water's plan and the expected changes to the bills to deliver the plan please tell us any further thoughts you have?

***Please use the textbox below***

## Household Demographics

**Q31** Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

**Please select one answer only**

- Female
- Male
- I identify in another way
- Prefer not to say

---

**Q32** Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**Please select one answer only**

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q33**
- Student
- Prefer not to say

---

**Q33** **Answer if you have selected “retired” at question 32 (Q32 above)**

Does the main income earner have a state pension, a private pension or both?

**Please select one answer only**

- State only
- Private only **Please go to Question Q34**
- Both **Please go to Question Q34**
- Prefer not to say

---

**Q34** **Answer if you have selected “private only” or “both” at question 33 (Q33 above)**

How would you describe the main income earner’s occupation type before retirement?

**Please select one answer only**

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- None of these

Prefer not to say

---

**Q35** Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion.

***Please select all that apply***

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

---

**Q36** What is your ethnic group? Choose one option that best describes your ethnic group or background

***Please select one answer only***

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**OTHER ETHNIC GROUP**

- Arab
- Any other ethnic group
- Prefer not to say

---

**Q37** Which of the following bands does your household income fall into from all sources, before tax and other deductions?

***Please select one answer only***



- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

## Final Questions

**Q38** We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

**Q39** Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

- Yes
- No

**Q40** Would you like to join South Staffs Water's online community, called H2Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*

- Yes
- No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with South Staffs Water to send you an invite. This will be held securely and will only be used to invite you to join the online community in the coming days.

South Staffs Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.south-staffs-water.co.uk/household/extra-help/help-with-paying>

Thank you for taking part, your feedback will help South Staffs Water to finalise its business plan.

This research was conducted under the terms of the MRS code of conduct and is completely confidential.

# APPENDIX G

Cognitive Report

# Contents

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# 1 INTRODUCTION

## 1.1 Objectives

Cognitive testing was conducted to ensure accessibility and comprehensibility of the quantitative questionnaire. This process is important as the material focuses on topics that may be unfamiliar to many customers.

Cognitive interviews involve taking a participant through the research materials to probe for levels of comprehension and response to the stimuli.

## 1.2 Methodology

The interviews took place on Zoom from 12<sup>th</sup> to 14<sup>th</sup> July. Each interview took place in two parts to replicate the process involved in participants completing the questionnaire in their own time:

- For the first part, participants were asked to share their screen and complete the survey without any interaction with the interviewer. Interviewers watched participants complete the survey, whilst noting how long each section took and any facial cues.
- For the second part, interviewers took participants back through their completed survey and asked their thoughts on each section. Interviewers used cognitive probes to assess areas of the questionnaire that were inaccessible or difficult to understand.

The interviews lasted approximately 45 minutes.

## 1.3 Sample

Six participants were recruited through free-find recruitment:

- Four cognitive interviews were with household customers.
- Two cognitive interviews were with non-household customers.

Both the household and the non-household interviews covered a range of customer types (as shown in Table 1 below). All participants were proficient at using the Zoom and did not work in Market Research.

Household participants were offered an £50 incentive to thank them for their time. Non-household participants were offered £60 if they completed both stages of the cognitive interview process.

**Table 1: Sample breakdown**

<b>Group</b>	<b>Quotas</b>
4x HH Customer	2x SSW 2x CAM
	2x SEG ABC1 2x SEG C2DE
2x NHH customer	1x SSW 1x CAM

# 2 FINDINGS

## 2.1 Overall findings

The first part of the interview took between 8 and 22 minutes to complete, when participants were asked to complete the survey uninterrupted. The average survey completion time was 14 minutes and 54 seconds.

Overall, participants felt the questionnaire was interesting and informative. For some participants, the questionnaire was too text-heavy in places. Recommended actions are detailed below for the relevant sections.

*“There is lots of information provided ... lots of figures. I’m impressed with the level of actions that are included. [South Staffs] obviously have a lot of plans. There is a clear plan of action in every area.”*

Participants thought the purpose of the questionnaire was to test affordability for future price increases and to educate customers on South Staffs and Cambridge Water’s future plans.

## 2.2 Current Affordability

### Questions 9-13:

#### Affordability

We are now going to ask you some questions about your household’s financial situation.

Thinking about your finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills?

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say you are managing financially now?

- Finding it very difficult
- Finding it quite difficult
- Just about getting by
- Doing alright
- Living comfortably
- Prefer not to say

Thinking about your household’s financial situation over the next few years up to 2030, do you expect it to get:

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don’t know

Your current water and sewerage services bill is £480. How easy or difficult is it for you to afford to pay your current water and sewerage bill:

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Prefer not to say

## Feedback:

This section was found to be clear and straightforward by most participants.

For two participants, these questions were felt to be invasive and awkward to answer. Despite this, both participants felt they did provide an honest answer.

*“It’s quite invasive really to be asking people how they are getting on at the moment.”*

*“It’s bit too personal .. Why do you want to know if I’m struggling or not? Even if I were, what would you do? You have to pay utility bills otherwise they cut you off. If they go up in price there is not much we can say about it. We need water to run a business and we can’t switch our supplier.”*

There was reluctance amongst 4 out of 6 participants to say their bills were easy to afford at present. This was out of fear that this may be perceived as willingness to pay for future price increases.

*“It’s awkward! Nobody wants price increases. Everything is going up and if prices did increase we could afford it. Nobody wants to pay out but I guess you have to for the service you get. We could afford it but would we want to pay it? No.”*

*“Small increments would be okay but when it triples or doubles, that is out of reach.”*

## Action:

- None.
  - o The question and response codes are mandated.

## 2.3 Proposed changes to your water/sewerage bill

Questions 14 and 15:

## Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

*Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.*

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

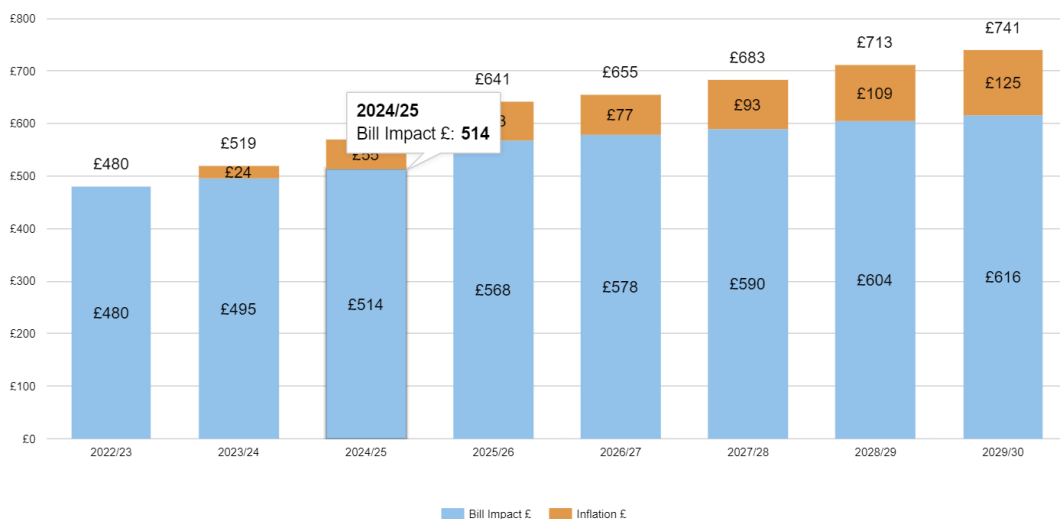
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

How easy or difficult do you think it would be for you to afford these water/sewerage bills?

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know



The following chart shows the expected increase in the **water only component** of your bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



How easy or difficult do you think it would be for you to afford these water bills?

- Very difficult
- Fairly difficult
- Neither easy nor difficult
- Fairly easy
- Very easy
- Don't know

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030.

Please tick all that apply

- Ask family and friends for financial support
- Using credit more than usual, for example, credit cards, loans or overdrafts
- Using my savings
- Using less water
- Using less fuel such as gas or electricity in my home
- Eat out less
- Cutting back on non-essential journeys in my vehicle
- Spending less on non-essentials
- Spending less on food shopping and essentials
- Shopping around more
- Don't know
- Other, please specify

### Feedback:

Participants found this section informative and easy to understand. The colouring of the chart helped with comprehension and clarity.

*“The graph is clear. The colours are good and it’s easy to read.”*

*“I’m not sure how you could explain [inflation] any better. It needs quite a lot of text. This is manageable and I like how the charts are laid out.”*

Although all six participants understood the text and graphs, there were mixed reactions to the volume of information presented. Four participants said it was informative and contained just enough information.

One participant mentioned that they would like an indicative monthly timeframe of when these increases would affect bills. One non-household participant suggested they would prefer to see the increases expressed in percentages.

*“I really liked how the bar charts were all laid out. It’s good that you can see it with inflation and without inflation. The jumps weren’t massive because they were scaled. You know I could do an extra £20 or £30 per year and you divide that out by 12. If you had just gone in and said your bill is going up by £X, that would be a bit scary.”*

*“I’m working on percentages at the moment of increase to our bills so I suppose it would have been nice to see them in percentages, were just figures on the top.”*

On the other hand, some felt the charts contained too much information. For these participants, this volume of data was unnecessary as price trends could be understood from three or four bars, as opposed to eight. For one participant in particular, this caused concern around members of the general public being able to understand the graphs.

*“I know that they’re planning for 2025-2030 but there’s too many bars on that graph. By just showing 3 or 4 bars, I think people can see the trend.”*

*“I only really considered the first couple of years. I did glance at the later years but it’s in almost 10 years’ time ... I’ll worry about that then.”*

*“I understood what they’re trying to show here but the ordinary Joe public isn’t going to fully understand and appreciate diagrams”*

One participant found it difficult to answer questions on future affordability given the uncertainty of the current economic climate.

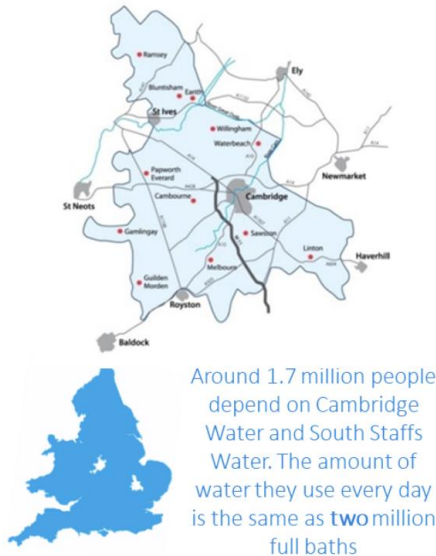
*“I found the future oriented financial questions hard. ... I don’t really know where I’ll be in 5 or 7 years. I hope I’ll be back at work so that’s why I think things will be easier.”*

### **Action:**

- None.
  - The question and response codes are mandated by guidance.

## 2.4 South Staffs and Cambridge Water's Plans – Performance Targets

### About Cambridge Water



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

### Feedback:

Three participants found the slide to be interesting, informative and easy to understand.

*"I like the layout and the graphics. It's interesting to see the amount of people [South Staffs and Cambridge Water] serve."*

One of these three participants expressed a desire for more information on strategies to deal with the 'seriously water stressed' classification of the area by the government.

*"The last bullet point where we're classed as seriously water stressed I would have wanted to see later in this document a little more on how they're dealing with and going to plan for this seriously water stressed category that Government has put them in."*

Another participant felt that the presence of chalk streams should have been mentioned given their unique presence in the region Cambridge Water serves.

*"There is no mention of chalk streams. Those make Cambridge unusual as they have the only remaining chalk streams."*

Two participants found this slide to be unnecessary and didn't want to know much about South Staffs and Cambridge Water.

*"Is it really relevant? No. I'm not interested in knowing who they are."*

One participant found the slide too text heavy and difficult to engage with.

*"There is too much text. It was a bit overwhelming with all the facts. A bit less text would be better."*

## Action:

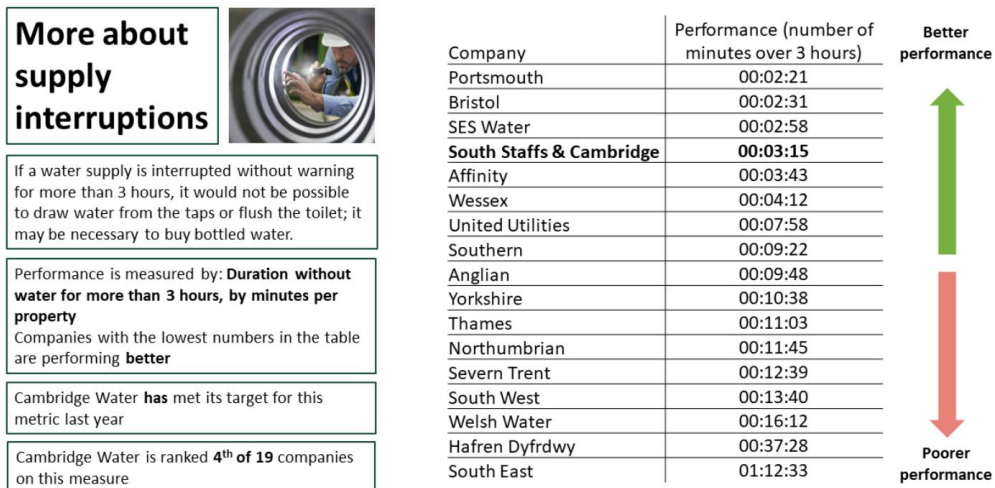
- Reduce the volume of text to aid engagement with the material.
- Avoid adding any additional information
  - o Only two participants requested more information, with each participant inquiring about different topics.
  - o Adding this additional information risks disengaging other participants who already think the slide is too text-heavy or unnecessary.

## Questions 16-19:

Water Supply Interruptions.

The following chart shows how Cambridge Water are performing in the area of "Water Supply Interruptions", against both their target and also the other water companies.

### Supply interruptions: the average length of time properties are without water



The following chart shows what Cambridge Water is proposing to do to improve its performance:

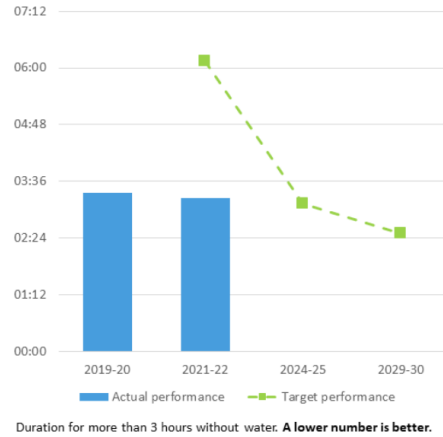
### Supply interruptions: the average length of time properties are without water

Average duration properties are without water, when the interruption to supply lasts for more than 3 hours, expressed by minutes per property.

#### What Cambridge Water plan to do and the benefits this will bring

- Build on our performance by continuing to invest in our pipe networks and invest in technology to allow more real time intelligence on our networks. This will allow us to react even quicker in the future.
- Cambridge Water's ambition is to continue this trend and maintain our top 4 position, in at least 4 of the years between 2020-2025.
- Cambridge Water has a target in its proposed business plan for 2025-2030 of reducing the average time without water each year to **2 minutes and 30 seconds per property by 2030**.

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



### Leakages

The following chart shows how Cambridge Water are performing in the area of "Leakages", against both their target and also the other water companies.

### Leaks: The amount of water lost due to leaks from water mains and pipes

#### More about leakage



Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Performance is measured by: **Leakage per property served per day**  
Companies with the lowest numbers in the table are performing **better**

Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **8<sup>th</sup> of 19** companies on this measure

Company	Performance (litres per day)
Bristol	65
Northumbrian	76
Portsmouth	77
SES Water	79
Anglian	80
Southern	83
South East	88
<b>Cambridge</b>	<b>91</b>
Wessex	103
South West	108
Northumbrian	108
Affinity	109
South Staffs	114
Severn Trent	120
Yorkshire	123
United Utilities	124
Hafren Dyfrdwy	131
Thames	152
Welsh Water	159



The following chart shows what Cambridge Water is proposing to do to improve its performance:

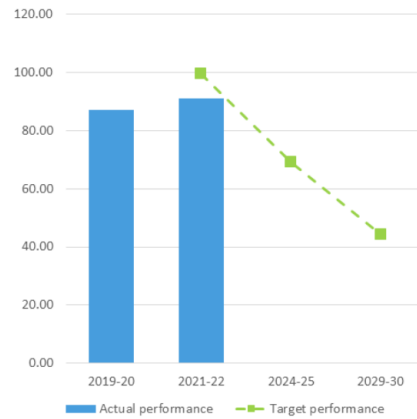
## Leaks: The amount of water lost due to leaks from water mains and pipes

Amount of water lost per day (in litres) due to leaks from water mains and pipes.

### What Cambridge Water plan to do and the benefits this will bring

- Use advanced leakage detection techniques and increased smart metering to find leaks quicker on both our pipes and those on customer properties. This means we will take less water from the environment.
- Cambridge Water has a target in its proposed business plan for 2025-2030 of reducing leakage by **50% by the 2050 target from 2017/18 levels**, and our interim targets reflect this trajectory.

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



Amount of water lost from pipes, expressed per property per day, in litres. **A lower number is better.**

## Water Quality Contacts

The following chart shows how Cambridge Water are performing in the area of "Water Quality Contacts", against both their target and also the other water companies.

## Water Quality: Appearance, taste and smell of tap water

### More about water quality



Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Performance is measured by: **Number of customer contacts received regarding incidents, per 1,000 properties**  
Companies with the lowest numbers in the table are performing **better**

Cambridge Water **has** met its target for this metric last year

Cambridge Water is ranked **5<sup>th</sup> of 19** companies on this measure

Company	Performance (number of contacts)	Better performance	
Portsmouth	0.41		
Thames	0.49		
SES Water	0.58		
Affinity	0.73		
<b>South Staffs &amp; Cambridge</b>	<b>0.76</b>		
Severn Trent	0.93		
Northumbrian	0.97		
Anglian	1.03		
Yorkshire	1.09		
Southern	1.10		
Wessex	1.17		
South East	1.34		
Bristol	1.38		
South West	1.55		
Hafren Dyfrdwy	1.71		
United Utilities	1.79		
Welsh Water	2.38		
			Poorer performance

The following chart shows what Cambridge Water is proposing to do to improve its performance:

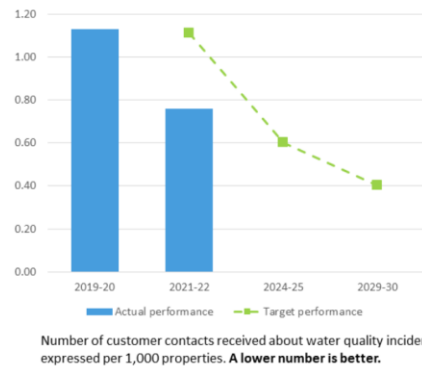
### Water Quality: Appearance, taste and smell of tap water

Chart shows the number of customer contacts received per 1,000 properties about water quality incidents e.g. discoloured water (brown tinge), or a strange taste or smell occurring.

#### What Cambridge Water plan to do and the benefits this will bring

- Building its largest-ever investment programme for water quality, to further invest in addressing specific risks to achieve sector leading levels of customer contacts about the colour, taste and smell of their water.
- The latest major upgrades to its two largest water treatment works due for completion in 2025 will help maintain the positive trend.
- Cambridge Water has a target in its proposed business plan for 2025-2030 of reducing the number of contacts received about water quality to **0.4 contacts per 1,000 properties by 2030**.
- Please note there are a range of other water quality targets the company must meet to ensure a safe supply to customers.

Targets for reducing the number of contacts received about water quality incidents.



### Feedback – Comparative Information:

Participants generally found the slides detailing comparative performance clear and detailed.

Five of six participants felt the slides presented interesting information on South Staffs and Cambridge Water's performance.

*"It's really good to see performance in comparison to other areas ... it's good to see the level of service we should expect from*

Despite understanding the slides, one participant found it difficult to grasp what the measurement scales were actually representing given they did not work in the water industry.

*"These may be the statistical measures that are used within the water industry but actually the performance statistic means absolutely nothing to me, it was just pleasing to see that South Staffs are 4<sup>th</sup> out of 19."*

One participant found the comparative performance information on water companies in other parts of the country less relevant.

*"There was a lot of information on there in relation to counties and other areas. Keep it to your local area and you're likely to read it more. If they're trying to improve services fantastic. Luckily we haven't had an issue here but if we did that would probably feel more relevant."*

#### Action:

- None. Presentation of comparative information is mandated by guidance.

### Feedback – Performance Commitments:



Engagement with the performance commitments varied with just two participants engaging with the graphs. Both participants were critical of the scale of these graphs and the metrics used to display performance.

One participant felt the graphs were inaccurate due to the scale of measurement used and the absence of data points for some years.

*“There are years missing from graph - where’s 2022-23? There is a false scale on bottom of graph, it does not make sense. This graph is mathematically invalid.”*

*“You’ve got a false scale on the bottom of that graph, it doesn’t make sense.”*

One participant found the graph detailing leakage targets confusing as the scale differed between the comparative performance slide and the target performance slide.

*“I don’t understand the leakage metric ... it’s different for the target slide. It looks bad from mains and pipes and the prediction is that it will come down but it’s a skewed chart – it’s not like for like.”*

One participant found the performance commitments too text-heavy which appeared to prevent meaningful engagement with the graphical representation.

*“I would rather bullets with bare level of information. Reducing the text would help ... the text took away from the graph. There was lots of different colours and sizes you had to read so much to take it all in. you don’t take in the graph as much.”*

### Action:

- Remove the 2019-2020 data point. This will create more consistency within the data and will follow presentation as mandated by guidance.
- Reduce the volume of accompanying text with the graph.
  - o This will improve engagement with the graphical representation of the performance targets.

Based on what you have just read, which of these three parts of the business plan is the most important to you?

*Please select one answer only*

- Reducing the duration of water interruptions of longer than 3 hours
- Reducing leakage
- Preventing issues with taste/smell/appearance of tap water
- Don't know/can't say

### Feedback:

Some participants struggled with deciding which aspect of the business plan was most important to them. This was primarily due to the perceived importance of all areas covered.

*“Because [leakage] is the worst area that South Staffs are performing in and quite clearly if we’re going to run out of water then they’ve got to do something about the leakage but I could have ticked all three.”*



## Action:

- None. Presentation of comparative information is mandated by guidance.

## 2.5 South Staffs and Cambridge Water's Plans – Key Investment

### Questions 20-27:

#### Cambridge Water's Plans - Key Investment Areas

The next section will show you three of the important areas of investment in Cambridge Water's business plan before asking for your views on the plan as a whole.

The following slide describes one of the key investment areas of Cambridge Water's business plan:

#### Protect and restore the environment

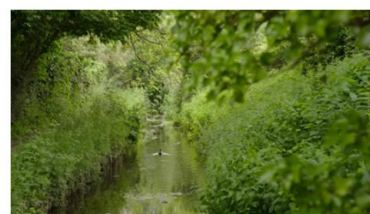
##### Making sure there is enough water for the future

Poor river quality in England coupled with climate change has placed increased pressure on the environment. Expected population growth of 18% by 2045 will also place more pressure on supplies to meet human demand.

Environmental work will focus on restoring the water environment, supporting customers to reduce their water usage, sourcing alternative supplies of water and reducing carbon emissions.

##### What Cambridge Water plan to do and the benefits this will bring

- Invest **£57m** to lay the preparations for new water sources, including a reservoir and water transfer, so that less water is taken from the underground aquifers that feed the region's chalk streams
- Invest **£37m** to roll out new metering technology to all customers to help spot leaks faster and encourage people to use less by giving them more regular information. Customers will be offered advice and support (including continuing to offer discounted tariffs for low-income households) to help avoid increased bills when households move onto a metered supply
- Invest **£16m** in schemes to help restore water environments, so they have a healthy level of water flowing in them and allow local plants, trees and wildlife to flourish
- Invest **£6m** to install solar panels and other renewables at our sites
- Invest **£4m** to reduce leakage levels quicker than required to meet the national target of a 50% reduction from 2017/28 by 2050.



**To make these investments  
will cost £116m between  
2025 and 2030**

**That's £12.10 more on the  
average annual bill for  
household customers.**

The following slide describes one of the key investment areas of Cambridge Water's business plan:

## Improve Water Quality

### Ensuring water is safe for human consumption

With an increasingly polluted water environment, alternative treatment methods are required to continue to make water safe for human consumption. There are also risks within the network as around 1 in 4 properties across the region are estimated to be supplied by lead pipes.

Water quality work will focus on removing any potential risks to water quality, affecting the taste, smell or colour of water supplied to customers.

### What Cambridge Water plan to do and the benefits this will bring

- Invest **£13m** to improve disinfection processes at seven sites, including more ultraviolet treatment equipment.
- Invest **£4m** to improve the filtration process across water treatment sites and mains cleaning to remove sediment build-up.
- Invest **£7m** to increase the rate of lead pipe replacement from properties targeting vulnerable customers -such as schools and care homes. Please note that the water supply is currently dosed with approved chemicals to protect against lead pipes being a danger to public health and this will continue until all lead pipes are removed.



**To make these investments will cost £24m between 2025 and 2030**

**That's £2.50 more on the average annual bill for household customers.**

The following slide describes one of the key investment areas of Cambridge Water's business plan:

## Increasing resilience of the water network

### Future-proofing the network to increase resilience

The ageing infrastructure needs investment to ensure that it is fit for the future. Given the increasingly erratic weather conditions, including storms, cold snaps and very hot weather, sites need extra protection to reduce the chance of them failing.

Work on increasing resilience of the network will focus on improving capability to identify issues proactively to better manage the network for household and business users.

### What Cambridge Water plan to do and the benefits this will bring

- Invest **£10m** to upgrade sites e.g. power generators to ensure resilience to power cuts to keep the water flowing.
- Invest **£9m** to lay more pipes to increase flow around the network in the event of pipes failing.
- Invest **£3m** to install more smart sensors and technology to identify issues before they cause the network to fail (e.g. burst pipe main).



**To make these investments will cost £22m between 2025 and 2030**

**That's £2.30 more on the average annual bill for household customers.**

Based on what you have just read, which of these three parts of the business plan is the most important to you?

*Please select one answer only*

- Increasing resilience of the water network
- Improve water quality
- Protect and improve the environment
- Don't know/can't say

**Feedback:**

Most participants engaged heavily with the information provided on these slides, which was thought to be clear and detailed.

Although all three areas were considered to be important to most participants, each participant was able to decipher which area they considered as the most important investment.

*"I found it really hard to answer because they are all really important but environment is most important so had to go with that one."*

*"These questions were easy to answer. The detail given was really informative and helped me make a decision."*

The coloured box detailing the required investment was informative and helped customers to understand how these costs would affect their bills on an annual basis.

*"I really liked the coloured box. I love how it is broken down to an annual figure ... it shows that it is doable. It makes you think about it and the figures seem real"*

For one participant, the slides were too text-heavy despite the information being broken down into separate sections.

*"It's a lot of text. Condensing it into bullet points would be better. It was too text-heavy."*

Furthermore, one participant was critical of the statement that poor river quality and climate change had increased pressure on the environment as they felt water companies and local authorities were to blame and therefore it was misleading.

## Action:

- Reduce the volume of text to aid engagement with the material.

Based on everything you have seen and read about Cambridge Water's proposed business plan, how acceptable or unacceptable is it to you?

*Please select one answer only*

- Completely acceptable
- Acceptable
- Unacceptable
- Completely unacceptable
- Don't know/can't say

What are the two main reasons that you feel the proposals for your water supply are acceptable?

*Please choose up to two answers only*

- Compared to energy prices it's cheaper
- The company provides a good service now
- I support what they are trying to do in the long term
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- The plan is good value for money
- The change to my bill is small
- I trust them to do what's best for customers
- The plan is affordable
- Their plans seem to focus on the right services
- Other 1, please specify
- Other 2, please specify
- Don't know/ can't say

Long term investment by Cambridge Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?

*Please select one answer only*

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

### **Feedback:**

Participants found it easy to answer on the acceptability of the business plan.

One participant commented that they selected 'I don't know enough at the moment to give an answer' for the long term investment question as they wanted further information on how South Staffs planned to tackle resilience of the water supply.

#### **Action:**

- None. Questions and response codes are mandated by guidance.

## **2.6 Attitudes and Behaviours**

Question 27a:

How strongly do you agree/disagree with the following: Please respond on a scale of 1 to 10 where 1 = strongly disagree and 10 = strongly agree.

	Strongly disagree	1	2	3	4	5	6	7	8	9	Strongly agree	10	Don't know
I would be willing to change my daily habits to reduce my water usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It's important that my water company deals efficiently and quickly with customer service queries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'd be happy to pay a little more on my water bill to help customers who are struggling to pay their bill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Companies should contribute towards the wellbeing of the communities they serve	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We should pay more for products/services that are environmentally friendly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am concerned about the quality of the drinking water I receive at my home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm concerned about the quality of water in the rivers, streams or lakes in our local area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Feedback:

Participants found these questions straightforward and easy to answer. Five out of six felt they answered instinctually.

*"I didn't find it too difficult, I ticked the first thought that came into my head."*

One participant found these questions difficult to answer as they struggled to decipher the scale of their agreement with the statements. As a result, this participant opted for the middle option each time.

*"I hate these questions when you have to scale it. I struggle with how deciding how strongly I agree or disagree. I often go for the middle."*

### Action:

- None.

## 2.7 Demographic Questions

Questions 28-34: Household Customers Only

## Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

- Female
- Male
- I identify in another way
- Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)
- Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
- Supervisory or clerical/ junior managerial/ professional/ administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)
- Skilled manual work** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)
- Semi or unskilled manual work** (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)
- Housewife/Househusband
- Unemployed
- Retired
- Student
- Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion.

*Please select all that apply*

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background

**WHITE**

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

**MIXED**

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

**BLACK OR BLACK BRITISH**

- Caribbean
- African
- Any other Black background

**CHINESE OR OTHER ETHNIC GROUP**

- Arab
- Any other ethnic group

- Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions?

- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

**Feedback:**

Participants who were household customers found these questions easy to answer.

**Action:**

- None.

Questions 35-38: Non-Household Customers Only

## Demographic Questions

How does your organisation mainly use water at its premises?

*Please select all that apply*

- For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)
- For the supply of services your organisation provides (eg cleaning services etc)
- For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)
- For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)
- None of the above
- Don't Know

How many sites in the UK does your organisation operate from?

- 1
- 2
- 3
- 4
- 5-10
- 11-50
- 51-250
- 250
- Prefer not to say

How many employees does your organisation have in the UK?

- 0 (sole trader)
- 1 to 9 employees (micro)
- 10 to 49 employees (small)
- 50 to 249 employees (medium)
- 250+ employees (large)
- Prefer not to say



Which of the following best defines the core activity of your organisation?

- Agriculture, forestry and fishing
- Mining and quarrying
- Energy or water service & supply
- Manufacturing
- Construction
- Wholesale and retail trade (including motor vehicles repair)
- Transport and storage
- Hotels & catering
- IT and Communication
- Finance and insurance activities
- Real estate activities
- Professional, scientific and technical activities
- Administrative and Support Service Activities
- Public administration and defence
- Education
- Human health and social work activities
- Arts, entertainment and recreation
- Other service activities
- Other (please specify)

- Prefer not to say

### **Feedback:**

Customers who were non-household customers found these questions generally easy to answer.

One participant struggled to choose a core activity for their organisation as they engaged in more than one of these core activities in the daily operation of their organisation.

### **Action:**

- None.

# APPENDIX H

Proposed Alterations From the Guidance

# Proposed Alterations from the Guidance

## Briefing note for PR24 Acceptability and Affordability research

### Introduction

This document sets out for the ICG where SSC and Accent propose to deviate from the Ofwat/CCW guidance for the quantitative phase of the PR24 Acceptability and Affordability research.

It includes descriptions of the changes and the reasoning behind them including evidence from cognitive interviews and the qualitative phase.

### Questionnaire design

#### 2.1 Water meter scoping question

#### Guidance

**S3. Are you currently charged for water through a water meter?**

*Please select one answer only*

80

SINGLE CODE

Yes	1	
No	2	
Don't know	97	

#### Proposed change

**IF HH:** Do you have a water meter at **[IF HH]** your home **[IF NHH]** business/organisation?

Yes – I/we asked to have one installed

Yes – it was already in the property when I/we moved in

Yes – I/we had to have it fitted, but I/we didn't really want it installed

No – and I/we not interested in getting one

No – but I/we are considering getting one

No – I/we had one, but decided to opt out

Don't know

#### Reason

This alternative question was chosen to align with previous SSC surveys and provide more detailed information about why participants do or do not have a water meter. It will also still

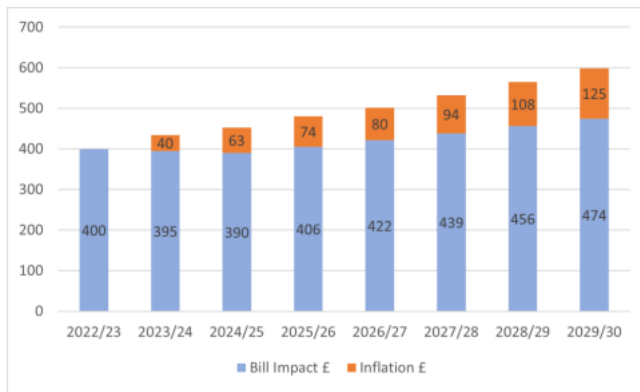
enable SSC to aggregate up to meet the Yes/No response in the guidance for any analysis purposes.

### Final Decision:

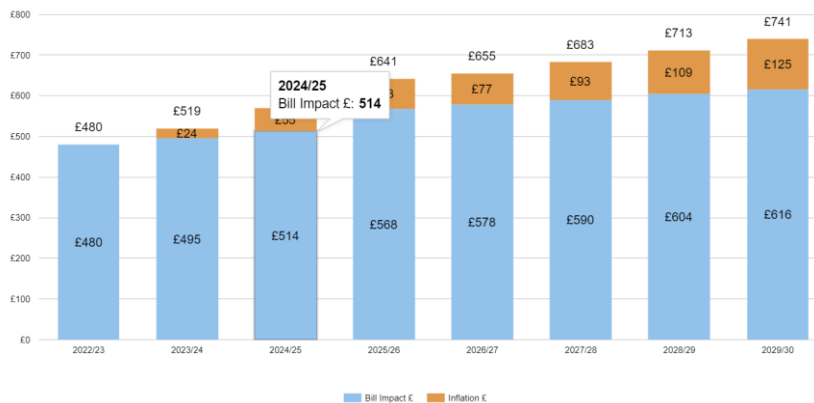
Amend response codes to reflect those provided in the guidance.

## 2.2 Presentation of bill impact bar chart

### Guidance



### Proposed change



### Reason

The figure above each bar was added to aid participants' understanding of the bill increases.

The qualitative cognitive interviews found that participants were happy to see the bill impact and inflationary impact represented separately, however, some remained confused about the overall total bill impact.

### Final Decision:

Keep the figure totaling the bill and inflationary increase.

## 2.3 Presentation of clean water only bill impact chart

### Guidance

For WoCs the business plan will only relate to water services and acceptability of the plan should be against the bill impact of that plan, ie current water only bill and estimated bill profile for 2025-2030. This will be different to the affordability testing at the start of the questionnaire which will be based on whole bill impact (ie including water and wastewater services).

- 
2. Affordability testing for the water only future bills and wastewater only future bills can be tested, but only as additional questions at the end of the questionnaire. Where research is jointly commissioned it makes sense for the combined business plans to be tested first and then the individual plans separately.

### Proposed change

Within the section on Cambridge/South Staffs Water's plans, participants will initially be shown the water only bill impact chart. In the cognitive testing this was shown to customers as the feedback showed it provided good context of the water only bill before being shown the details of SSW/CW plan.

1)

#### Cambridge Water's Plans

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025-2030.

**The plan elements we are going to show you are related to your water supply only**, that is the services that Cambridge Water supplies.

The following chart shows the expected increase in this **water only component** of your bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

**The figure above each bar represents the total expected bill amount (the blue plus the orange)**

INSERT WATER ONLY BILL.

After the presentation of the business plans and subsequent guidance mandated acceptability and phasing questions, participants will again be shown the water only bill impact chart and asked about its affordability.

2)

As you saw previously, this chart shows the expected increase in the **water only component** of your bill over the next few years. When reviewing, please reflect on what you have just read about Cambridge Water's plans for 2025-2030.

INSERT WATER ONLY BILL FOR SECOND TIME.

<J:\3610 S Staffs A&AT\Project management\workings & analysis\Quant bill calculator\CAM Bill Increase Graph calculator.xlsx>

USING CAMBSWO TAB

**[HH only]:** Please note that for the year 2022/23 Cambridge Water have worked out your bill from the records it holds for that period, and so it may not reflect what is shown on the latest water bill you have received.

**[IF Social Tariff Customer (from sample)]:** This bill profile is based on the financial support scheme you are currently on.

---

**Q27a** How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

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

## Reason

SSC believe it would be beneficial to test the affordability of the clean water only bill impact and to do so once participants are aware of what the business plan includes. The chart is shown twice so that participants have an initial idea of the clean water only bill impact and then a reminder just before they are asked about the affordability.

Findings from the qualitative cognitive interviews show that participants wanted to see the separation of the combined bill, covering water and waste water services and the single, water-only bill. Participants found it clarifying to know which specific services they were paying for, especially if one bill is much higher than the other.

**SSC comment:** We are proposing this as we are concerned that customers will then read the details of the SSW/CW plan and still have in their minds the combined bill impact, which may skew their thinking. The other alternative is to just put a short text summary explaining what the typical bill increase is for AMP8, rather than the bill chart. Ofwat/CCW have pushed back hard on us showing the chart here saying they would not accept this change, unless there is support from the qual/quant Cogs and the ICG to include the clean water bill profile at this point.

## Final Decision:

Given Ofwat/CCW's reluctance to accept deviation from the guidance without rigorous evidence and full back from the ICG, the clean water only bill will not be shown twice. **Instead, the following text will be included before Q16 in the survey:**

---

**Earlier in this survey we showed you a graph of how your combined water and waste water bill might change over the next 7 years up to 2030. [South Staffs] OR [Cambridge] Water only provides water services to customers, and so that graph included costs for waste services that [South Staffs] OR [Cambridge] Water do not provide and cannot control.**

**FOR SSW ONLY:**

■ **[IF HH]** For context, the typical annual household bill for the clean water services that South Staffs Water provides is expected to increase from **£174** in 2023/24 to **£228** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

■

■ **[IF NHH]** For context, the typical annual business customer bill for the clean water services that South Staffs Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

**FOR CAM ONLY:**

■ **[IF HH]** For context, the typical annual household bill for the clean water services that Cambridge Water provides is expected to increase from **£167** in 2023/24 to **£218** by 2029/30, including the impact of inflation. That's a rise of **31%** in what customers will pay.

■

■ **[IF NHH]** For context, the typical annual business customer bill for the clean water services that Cambridge Water provides is expected to increase by **31%** from 2023/24 to 2029/30.

## 2.4 Occupation demographic question

### Guidance

OCCUPATION

**Q11. Please indicate which one of the following best describes the profession of the chief income earner in your household**

*Please select one answer only*

SINGLE CODE

High managerial, administrative or professional eg doctor, lawyer, medium / large company	1	
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director (50+ people)		
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant	2	
Supervisor, administrative or professional eg police officer, nurse, secretary, self-employed	3	
Skilled manual worker eg mechanic, plumber, electrician, lorry driver, train driver	4	
Semi-skilled or unskilled manual worker eg waiter, factory worker, receptionist, labourer	5	
Housewife / househusband	6	
Unemployed	7	
Student	8	
Retired	9	

## Proposed change

**Q29.** Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

**Higher managerial/ professional/ administrative** (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)

**Intermediate managerial/ professional/ administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)

**Supervisory or clerical/ junior managerial/ professional/ administrative** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc)

**Skilled manual work** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc)

**Semi or unskilled manual work** (e.g. Manual worker, apprentice to skilled trade, Caretaker, Park keeper, non-HGV driver, shop assistant)

Housewife/Househusband

Unemployed

Retired **GO TO Q30**

Student

Prefer not to say

## Reason

The wording of the question was altered to align with previous SSC surveys and because it was felt that it would be easier for self-employed participants to complete compared to the wording in the guidance.

### Final Decision:

Keep the instructions for those who are self-employed in the question text. Amend response codes to reflect those mandated by the guidance.

**Q12. Which of the following best describes the previous occupation of the chief income earner in your household before retirement?**

*Please select one answer only*

SINGLE CODE

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)	1	
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant	2	
Supervisor, administrative or professional eg police officer, nurse, secretary, self-employed	3	
Skilled manual worker eg mechanic, plumber, electrician, lorry driver, train driver	4	
Semi-skilled or unskilled manual worker eg waiter, factory worker, receptionist, labourer	5	
Housewife / househusband	6	
Unemployed	7	
Student	8	



# Stimulus materials

## 2.5 Presentation of performance target charts

### Guidance

#### Ongoing performance targets

##### Using a line chart

You must use line charts to depict the ongoing performance targets for each data set. Particularly suited to tracking variations over time, these charts will help the customer to understand the journey your company is on towards improved performance.

##### Showing the right data

You should only show your company's current performance against your future targets.

You must not combine your company's future targets data with the comparison data for other companies on the same chart. Using separate charts will keep the data easier to understand.

##### Colours

You should use a separate colour to those used to display the comparison data-sets, to avoid any data misinterpretation.

##### Titles and subtitles

Clear and informative titles and subtitles have been written for the ongoing performance targets and must be displayed alongside the line chart. These may not be replaced or edited in any way. Titles are only provided for the targets applicable to all companies. If you have individual company targets, you will need to provide titles that clearly articulate the data for those graphs. Please refer to page 16 for a full list of titles.

##### Value and category axis

The value axis must be displayed with numbers relating to the title and subtitle. The category axis must show the target dates.

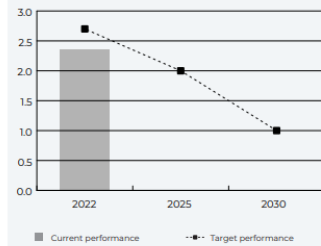
You should include full-width tick marks on the value axis to help customers distinguish the change in performance from one category to the next.

##### Using a key

You should use a key to distinguish your company's current performance and the future targets.

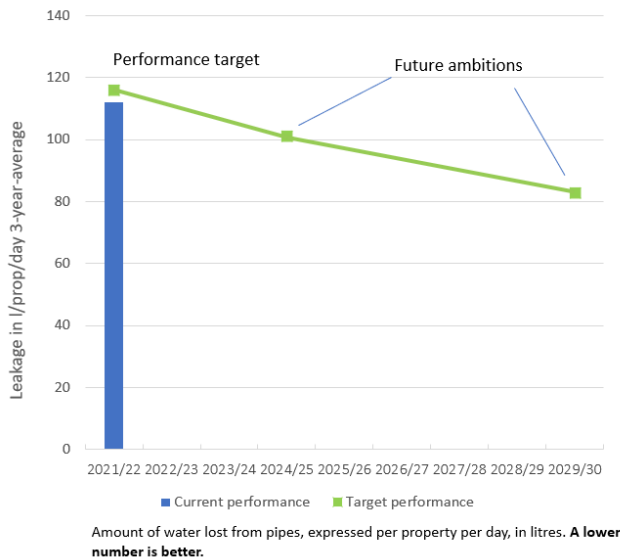
Targets for reducing the number of incidents of discoloured water (e.g. brown tinge); or a strange taste or smell occurring.

Number of customer contacts received regarding incidents, per 1,000 properties. (A lower number is better.)



### Proposed change

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



### Reason

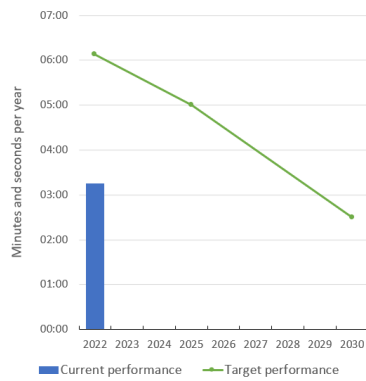
In the qualitative and quantitative cognitive interviews, participants expressed concern around the accuracy of the performance target charts, questioning the absence of some years along the x-axis. To improve clarity, the intervals on the x-axis consist of one unit only i.e. one year.

## Final Decision:

SSC, in conjunction with Accent, decided to adjust the charts to the below for Supply Interruptions, Water Quality Contacts and Leakage. The following charts communicate the relationship between South Staffs' past performance, future ambitions and industry-set targets most effectively.

## Supply Interruptions

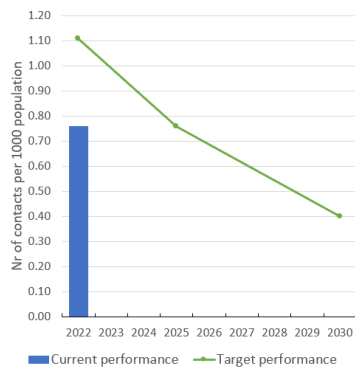
**Targets for reducing the average length of time properties are without water.**



Duration for more than 3 hours without water. **A lower number is better.**

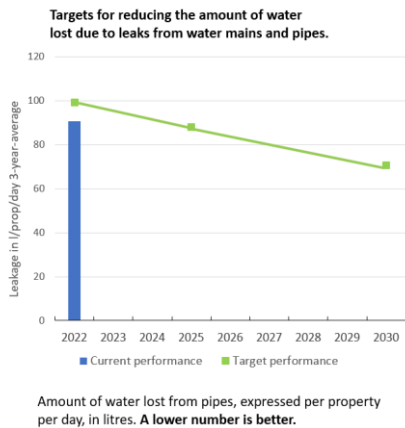
## Water Quality Contacts

**Targets for reducing the number of contacts received about water quality incidents.**



Number of customer contacts received about water quality incidents, expressed per 1,000 population. **A lower number is better.**

## Leakage



## 2.6 Introductory information

### Guidance

The guidance does not include any mention of introductory information on the relevant water company which can be added to the quant survey.

### Proposed change

Within the section on Cambridge/South Staffs Water’s plans, we propose to include the following text and a slide with introductory information that is geographically relevant and tailored to either HH or NHH participants.

Before we show you the company’s plans, we just wanted to tell you a few facts about the company and the challenges it faces. Please read the information below. Please remember that Cambridge Water only supplies clean water services (that’s the supply of water to your taps) and does not own or manage the wastewater/sewerage network, which is done by Anglian Water.

**[If HH show Slide 12]**

#### About Cambridge Water



Around 1.7 million people depend on Cambridge Water and South Staffs Water. The amount of water they use every day is the same as two million full baths

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day. Drinking water comes from 24 underground water sources, which feed into the chalk streams across the region
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013 and employ approximately 440 staff in Walsall and Cambridge
- The Cambridge Water region is now classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand.

### Reason

Results from the qualitative and quantitative cognitive interviews show that participants found contextual information on South Staffs and Cambridge Water insightful. Participants liked how these slides provide a general overview of the company, whilst also providing more specific information on the scope of the company’s operations and the areas it serves.

*Final Decision:*

Keep both slides with introductory information.