South Staffs & Cambridge Water

Findings from the WRAP's (Water Resources Advisory Panel)
Theme: Strategic Decisions

August 2021

community research

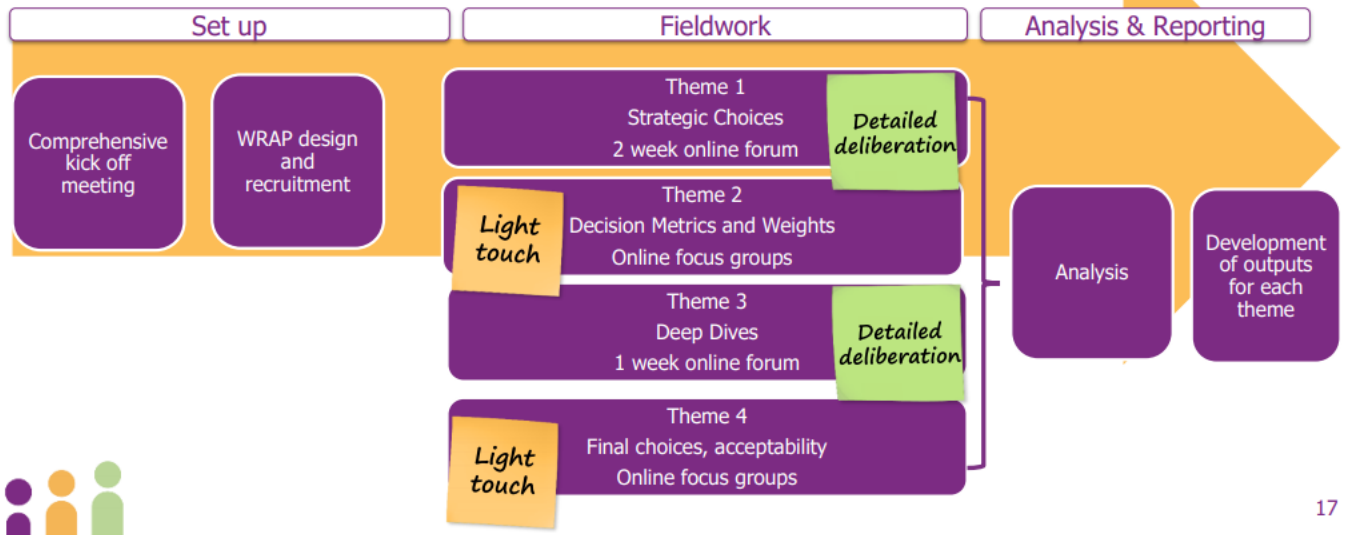
Bringing the voices of communities into the heart of organisations

Background and approach

Project background

- A comprehensive desk research study carried out by Accent/PJM (Dec-Feb 2020) recommended SSC undertake a four themed customer research programme to ensure customers' preferences underpinned the WRMPs in both supply regions
- In June 2021, SSC appointed Community research to undertake the qualitative elements of the programme and Accent/PJM the quantitative elements
- This deck covers the qualitative findings from the first theme (strategic choices)

The WRAP programme



Research aims: strategic choices theme

To explore household customer, future customer and SME business customer preferences in terms of:

- Environmental ambition
- Levels of service/resilience ambition
- Water efficiency ambition: leakage/PCC/metering
- Best value planning criteria

To ensure a "golden thread" of customer preferences in these strategic areas, which sets the context for the remainder of the engagement programme.

Method

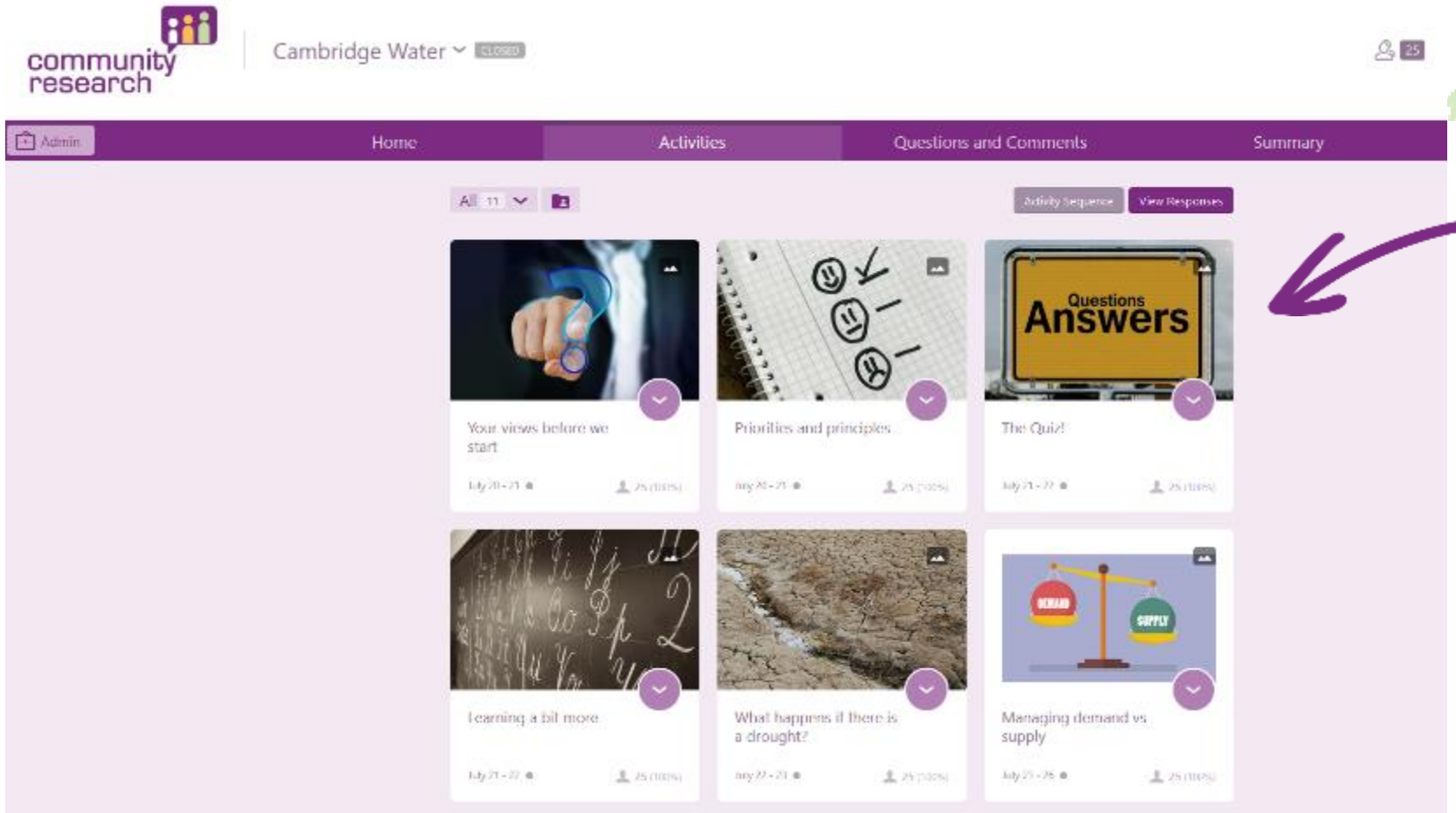
A deliberative research approach was chosen as the most appropriate for these research questions

Features of deliberative research

- Information is gradually provided to participants to take them on a journey from uninformed to informed.
    - This provides us with both spontaneous responses, as well as considered and informed viewpoints.
- Heterogenous (rather than homogenous) groups of participants, so that people are exposed to a perspectives from people from a range of backgrounds.

Due to COVID-19 the research was all conducted online

The online forum



Participants were provided with a series of tasks to complete online, including polling questions, discussion boards and self-filmed videos.

The deliberative journey – the core content was the same in each region

Week 1

Participants' starting points

- Survey exploring behaviour and attitudes to the environment
- Views on water company priorities and response to key principles/trade offs

Week 2

Resilience, demand and supply options and environment

- Spontaneous views / attitudes for each topic
- Provision of information in a variety of forms
- More informed discussion

Costs and fairness
Initial tasks revisited

- Information provided about cost and water bills
- Discussion about fairness and priorities in light of the cost information
- Repeat of priorities and principles tasks

Fieldwork took place between 20th July and 1st August 2021

Our sample

47 participants in total:

Type of customer	
Billpayer	18
Future customer	9
Small business	10

Water company	
Cambridge Water	25
South Staffs Water	22

Quotas set by a number of key characteristics, including:

- Gender
- Age
- Socio-economic group
- Ethnicity
- Location
- Presence of children
- Water meter in home
- Working status
- Vulnerability

This represents a proportionate response - the sample size was selected as the optimal approach to ensure a wide range of voices were heard in the context of budgetary constraints

Further details are provided at the end of this report - Additional information (sample, evaluation, stimulus material)

Views of the research experience

Mean average scores

South Staffs Water

CAMBRIDGE WATER COMPANY

Overall satisfaction with research experience (10-point scale)

Overall, how would you rate your experience of taking part in this research on a scale of 1-10, where 1 is very poor and 10 is excellent?

8.5

8.6

Only 1 participant does not want to continue in the WRAP. Future customers less likely to want to take part in live groups than other participants.

Having their say, the mechanics of the forum and the support provided were all rated highly. Most were particularly positive about the animations and the quiz.

Small number of comments about the time taken, the length & quality of the animations and the fact that some of the exercises were difficult!

I thought it was a thoroughly enjoyable and thought provoking forum that worked really well. I have also learnt so much about what Staffs are trying to achieve goals targets and I wish you every success in getting there. Stephen (billpayer)

I have really enjoyed taking part in the forum. I feel I can talk to friends and family about water and its processes. I really look forward to being involved in future activities. Wish Cambridge water all the future success. Many thanks Sarah (billpayer)

Further details are provided at the end of this report - Additional information (sample, evaluation, stimulus material)

Notes on the approach – general considerations

Please bear in mind this is **qualitative** research:

- Those who participated in this research 'opted in' to the process It could be that those who opted into the process are different in some way than other customers / citizens.
- It is also important to note, whilst polling results have been reported, qualitative research is not intended to be statistically reliable and, as such, does not permit conclusions to be drawn the wider population.
- Quotes have been included to illustrate particular viewpoints. The views expressed do not always represent the views of all those who participated.

The online forum approach is a trade-off

You get much more from each person than from face to face groups / workshops, but less interaction and reaction...we recommend that online live groups are conducted to fill this gap, if felt necessary

Notes on the approach – inclusivity considerations

The WRAP was conducted purely online and so excluded those who were not digitally literate. This was a pragmatic decision given it was convened during the Covid pandemic when face to face research was impossible. The online approach did have benefits in terms of allowing for a greater geographic reach than face to face research.

It also allowed for the engagement of individuals in vulnerable circumstances who are able to participate online and, in fact, find it easier than attending face to face sessions. For example, those who are 'just about managing'/in debt/poverty; those with long term physical or mental health conditions or mobility issues.

Clearly, some vulnerable people (i.e. those who are visually, sensory or cognitively impaired and those who are digitally excluded) are unable to participate in a forum of this type online. It would have been too difficult to meaningfully and accurately replicate the complexity of content in telephone depth interviews with these audiences.

It was, therefore, decided that the views of these audiences would be better represented through liaison with intermediary organisations (such as the convened stakeholder roundtables) as well as being captured in the three quantitative studies that ran alongside the WRAP.

The headlines

The headlines (golden threads)

Resilience
- Most expect more frequent restrictions than current service levels
- Level 1 (information) & 2 (TUBs) restrictions are acceptable and justified for most
- Most believe restrictions should be regional / national rather than more localised
- Environment Agency 1:500 year emergency drought target widely supported but mixed views on speed of delivering this

Water efficiency
- Leakage a key priority, but mixed views on national target
- Call for greater ambition in terms of speed of PCC reduction, but not in terms of the stretch ambition of 80l/p/d
- Strong agreement with compulsory meters – very strong support in Cambridge
- Support for higher tariffs for higher use (with caveats)

Environment
- Water companies have a central role in caring for water environment – but everyone else has a role to play too
- Ambitious target (level 3 – greater collaboration; ecological surveys; reviewing supply options) most popular, in spite of cost. Considered worth it to ensure supplies & protect environment
- No clear preference for timetable – but 20 years seems a reasonable compromise

Best value
- Participants generally favoured a balance between supply and demand options, but wanted to see demand management explored fully and first, before considering major supply side investments
- When asked to prioritise company actions at the end of the exercise, the provision of reliable, clean drinking water, minimising the environmental impact and reducing leakage were the top three in both areas.
- However, it should be noted that participants were forced to differentiate, and many expressed that they had found the exercise difficult. Furthermore, concerns in relation to affordability were a recurrent theme.

These key threads and themes were heard consistently in both regions and across participant characteristics.

community research

Key themes

- **The need for customer information and engagement***
- **Call for collective responsibility**
- **Concern for the environment***
- **Protection for vulnerable customers***

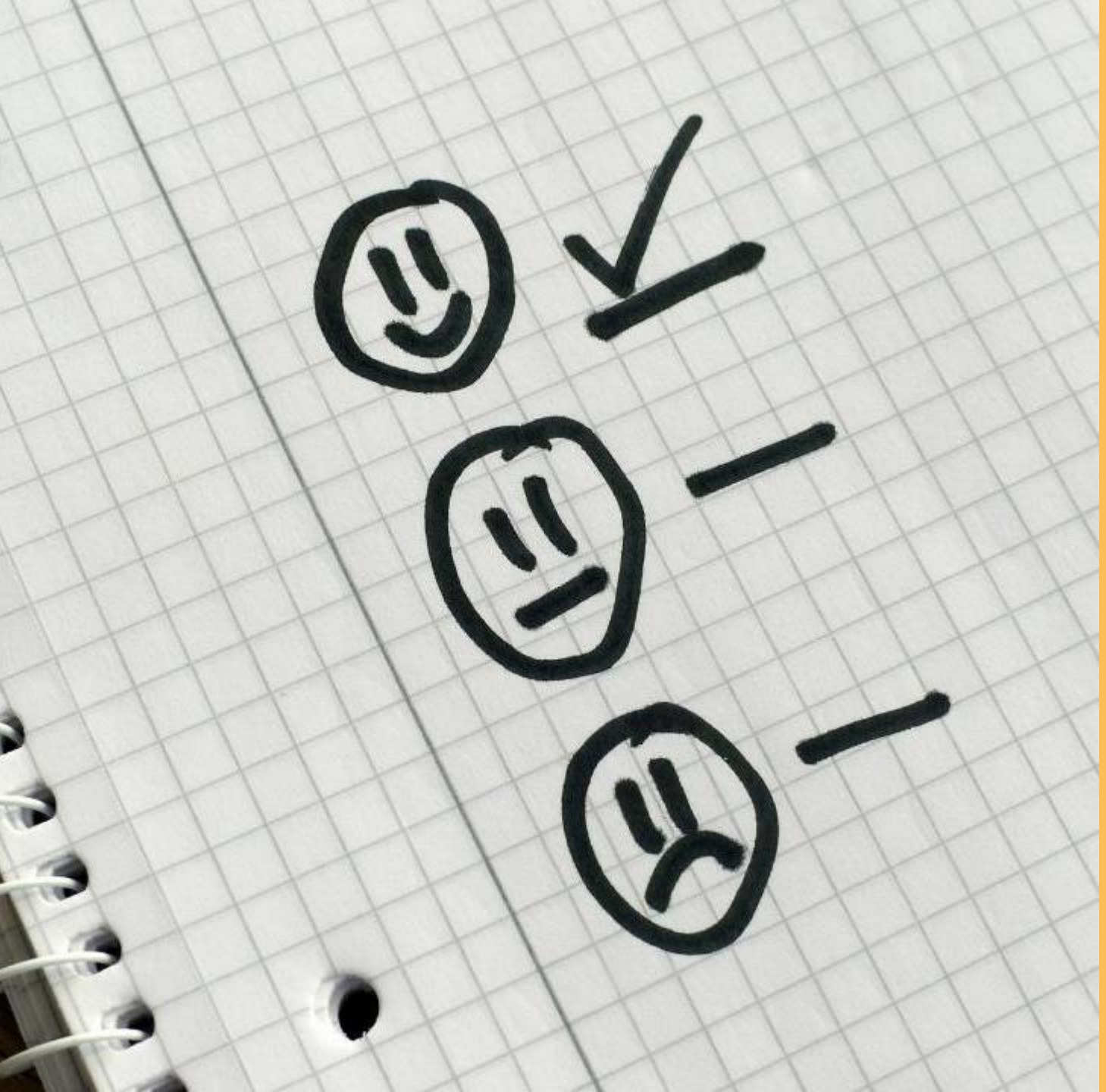
* These are also areas which have become more important to customers in Accent's Priority Tracker research.

Recommendations

- Keep WRAP members engaged by further communication and feedback on the findings.
- Whilst the option of follow up live group discussions was discussed at the inception of the project there is no obvious need for these and very little time to complete them before the next phase.
- As SSC develops its plans further, be mindful of key messages / findings:
  - Achieving balance throughout the plan – e.g., between demand & supply; short- & long-term solutions.
  - Considering demand side options first – particularly pursuing strong targets on leakage and compulsory metering (more frequent restrictions could be considered as part of the mix).
  - Pushing as hard as possible on environmental protection (whilst considering affordability) – avoiding further abstraction if at all possible.
  - Careful consideration of issues of fairness – a strong call throughout the process.
  - The need for effective customer communication to explain decisions and ensure customers play their part (collective responsibility).

Next Steps

- Deep Dive activity starting in September
- Stakeholder roundtable sessions – to follow in October
- The next WRAP activity – to be developed and run – timings to be agreed



Participants’ starting points

Views at the start

community research

Mean average scores

South Staffs Water

CAMBRIDGE WATER COMPANY

Overall satisfaction with water supply (10-point scale)
Thinking about your overall experience of your water supply - including the provision of water as well as charges, customer services and billing - how satisfied or dissatisfied are you?

7.6

7.2

Value for money (5-point scale)
Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?

3.7

3.6

Affordability (5-point scale)
How much do you agree or disagree that the water charges that you pay for are affordable to you?

3.6

3.7

Willingness to accept an **above inflation increase** (5-point scale)
How much do you agree or disagree that you would be willing to accept an above inflation* increase in your water bills over the next 10-15 years to ensure a reliable service of high-quality drinking from your water company over the long term?

2.9

3.0

Future customers were not asked these questions. Numbers represent mean average scores amongst current customers and SMEs

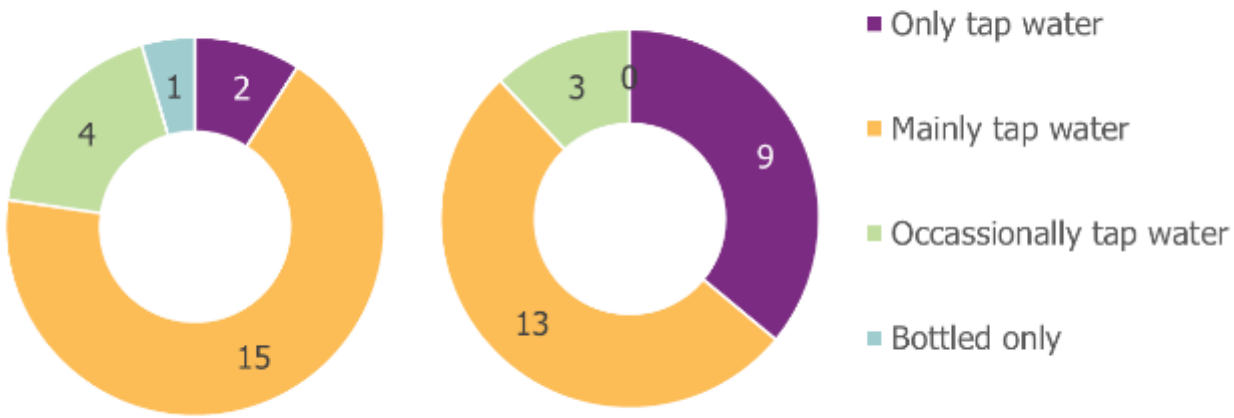
Scores are indicative, but similar to Accent Priority Tracker research where satisfaction was 7.96 and VFM was 3.94

Using and valuing water

South Staffs Water

CAMBRIDGE WATER

Which of the following best describes your own use of drinking water?

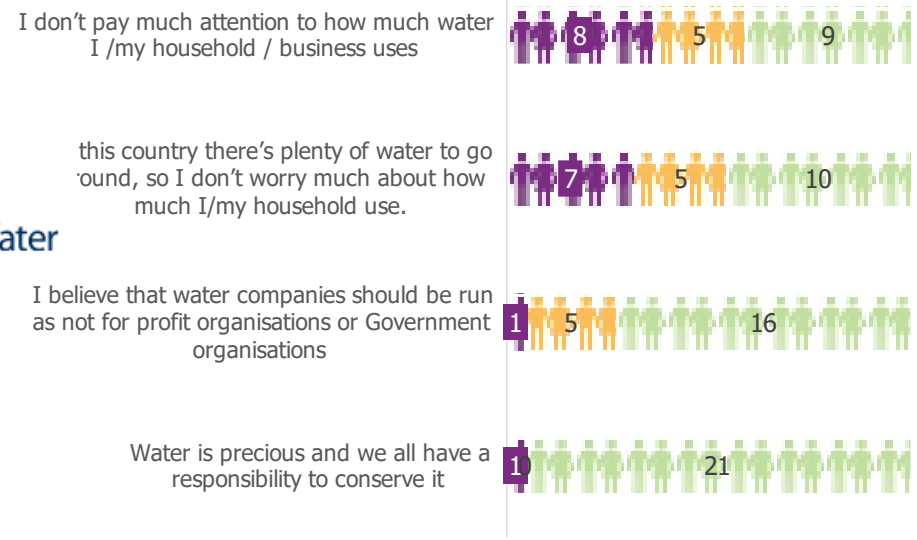


WRAP members in Cambridge are more likely to be drinking only or mainly tap water.

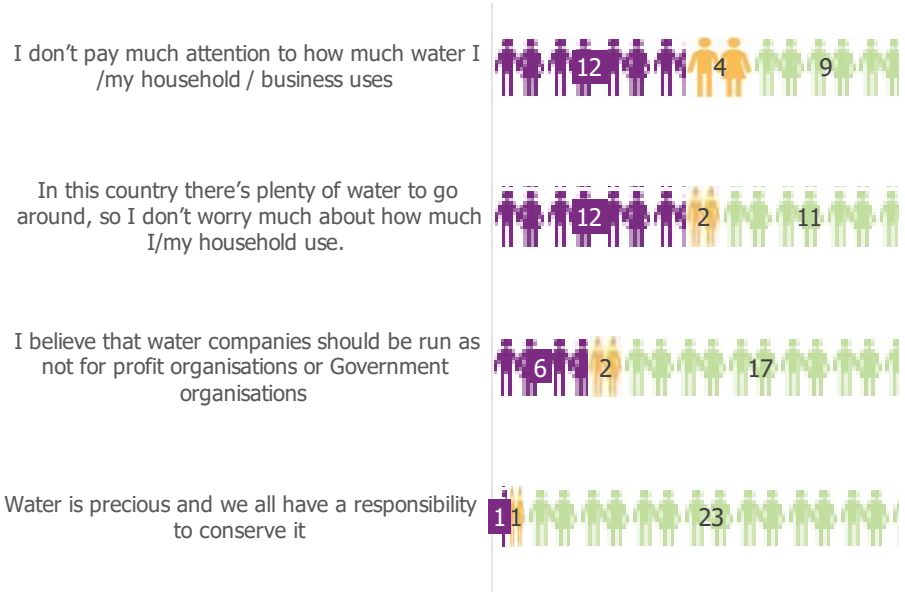
In Cambridge a higher proportion of WRAP members claim to pay attention to their water use. A higher proportion also disagree that 'there's plenty of water to go around'.

How far do you agree or disagree with each statement?

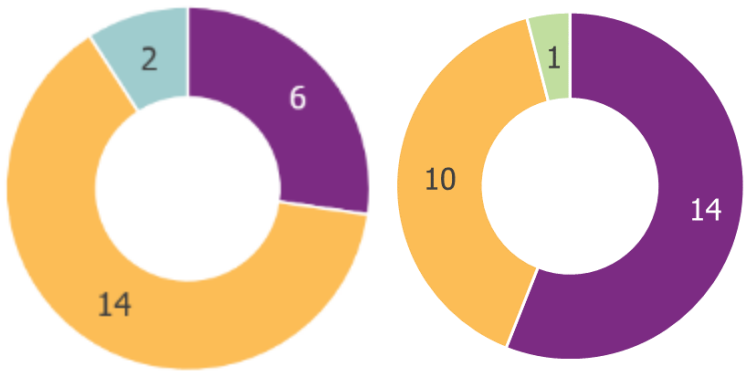
South Staffs Water



CAMBRIDGE WATER COMPANY



Environmental attitudes and behaviours

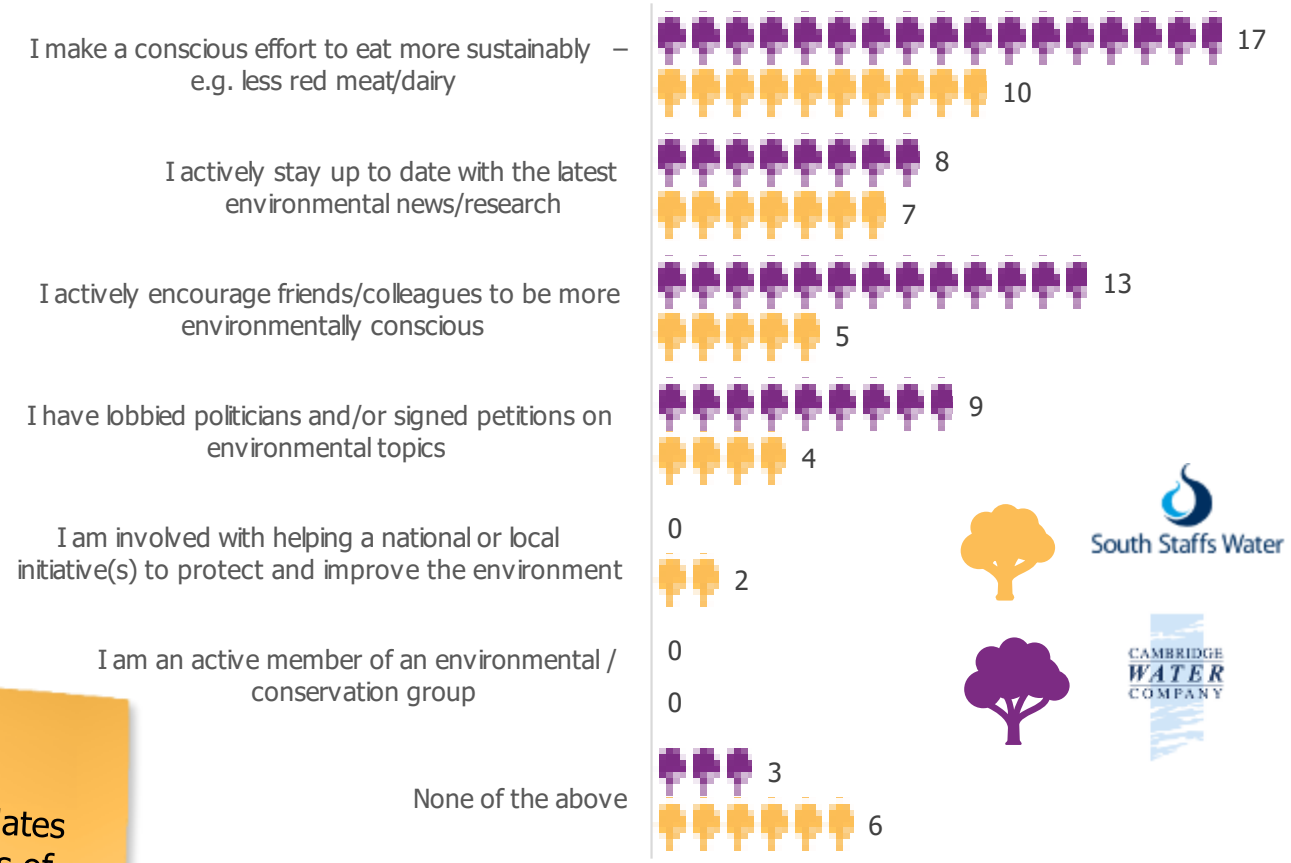


How important is protecting the environment to you personally?

Whilst protecting the environment is important to almost all, strength of feeling on this point is greater in Cambridge.

... and this translates into higher levels of claimed pro-environmental behaviours in the last 12 months.

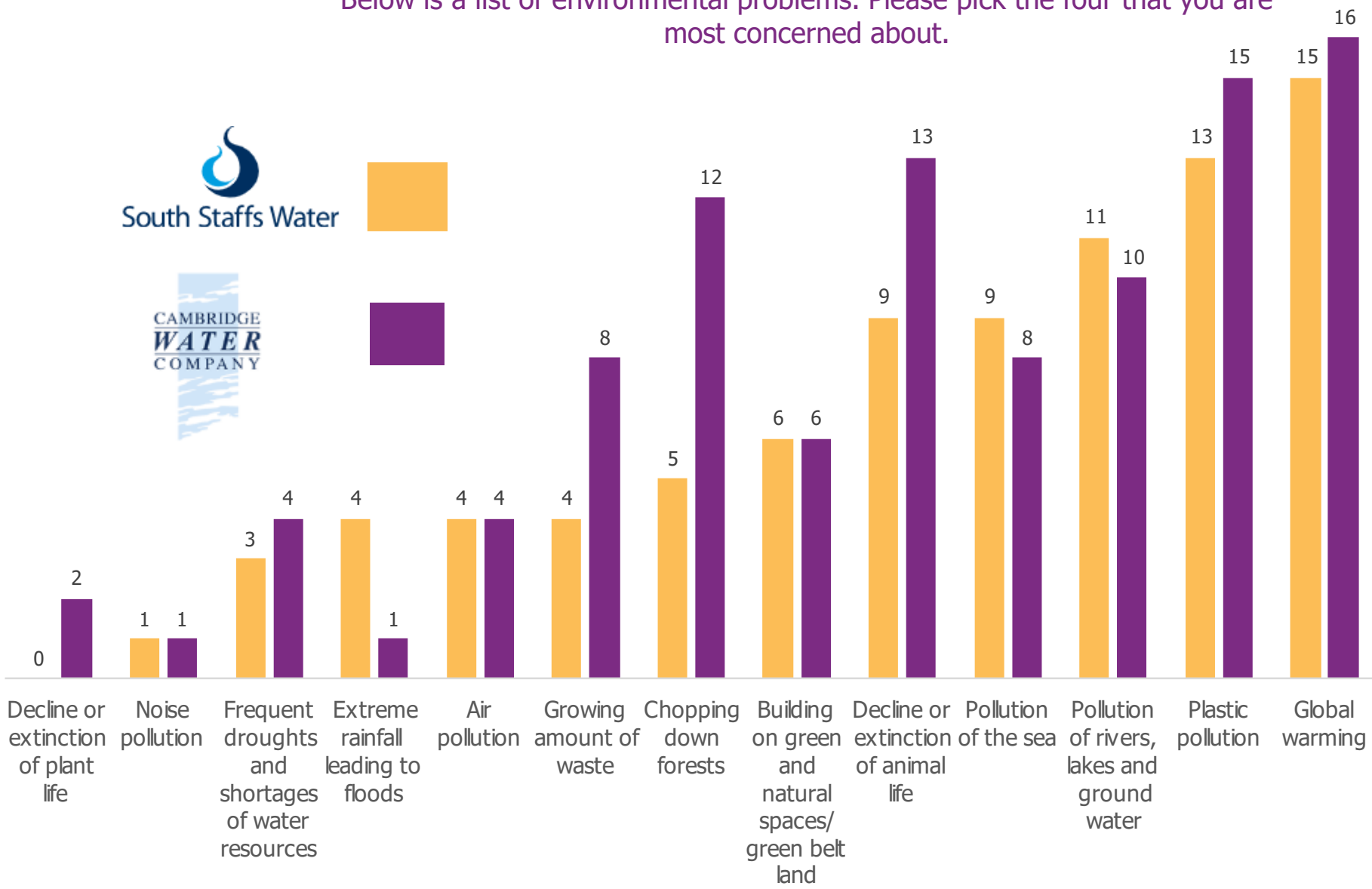
Which of the following statements applies to you over the last 12 months?



11 out of 22 South Staffs panelists and 17 out of 25 Cambridge panelists had visited a blue natural space (beach, river, lake, stream or urban blue space) within the last month.

Environmental concerns

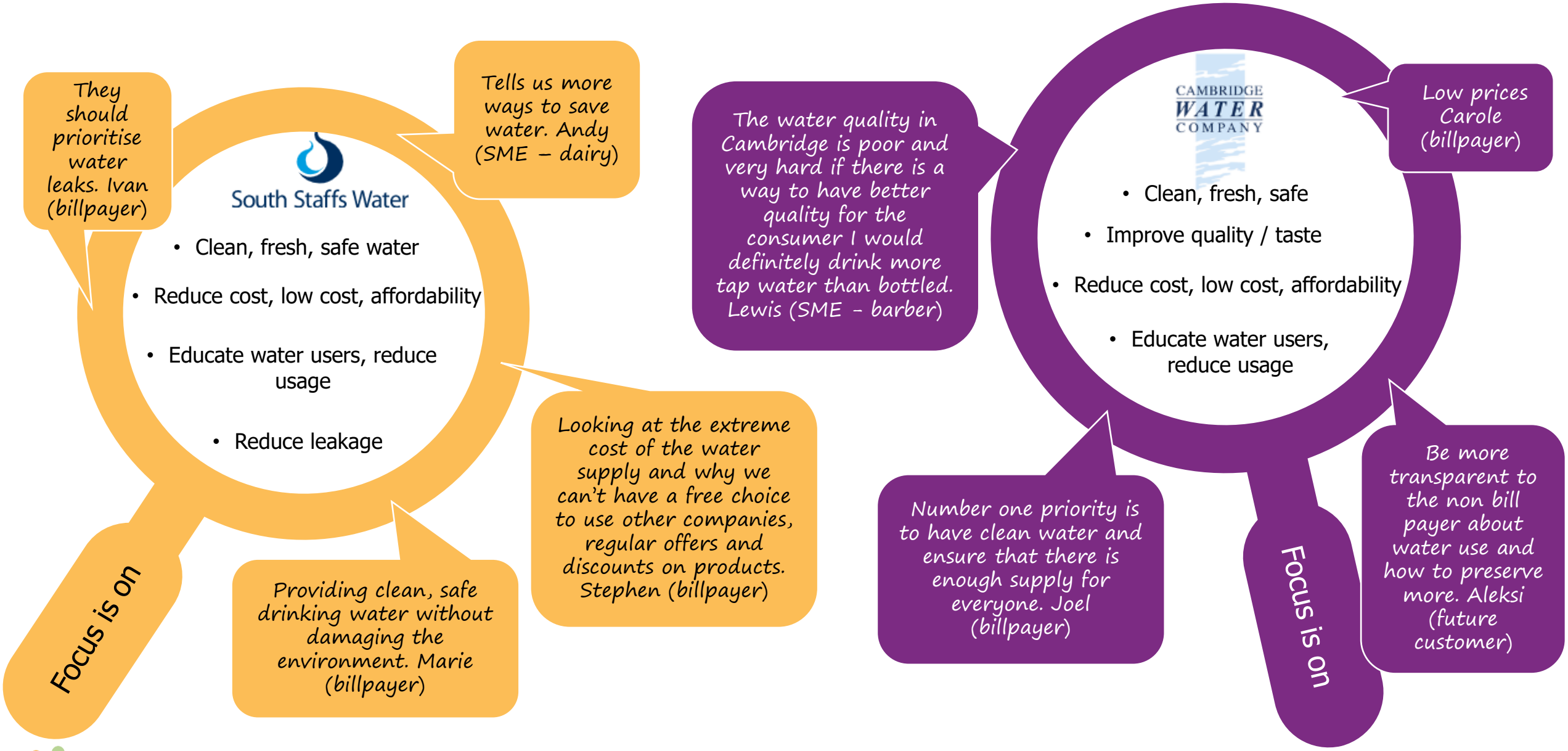
Below is a list of environmental problems. Please pick the four that you are most concerned about.



Cambridge members also more likely to express some concerns, with only 'extreme rainfall leading to flooding' of concern to more South Staffs members.

Global warming and pollution are most frequently cited concerns in both areas. This aligns with recent research for Consumer Council for Water.

Top three unprompted priorities for the water company



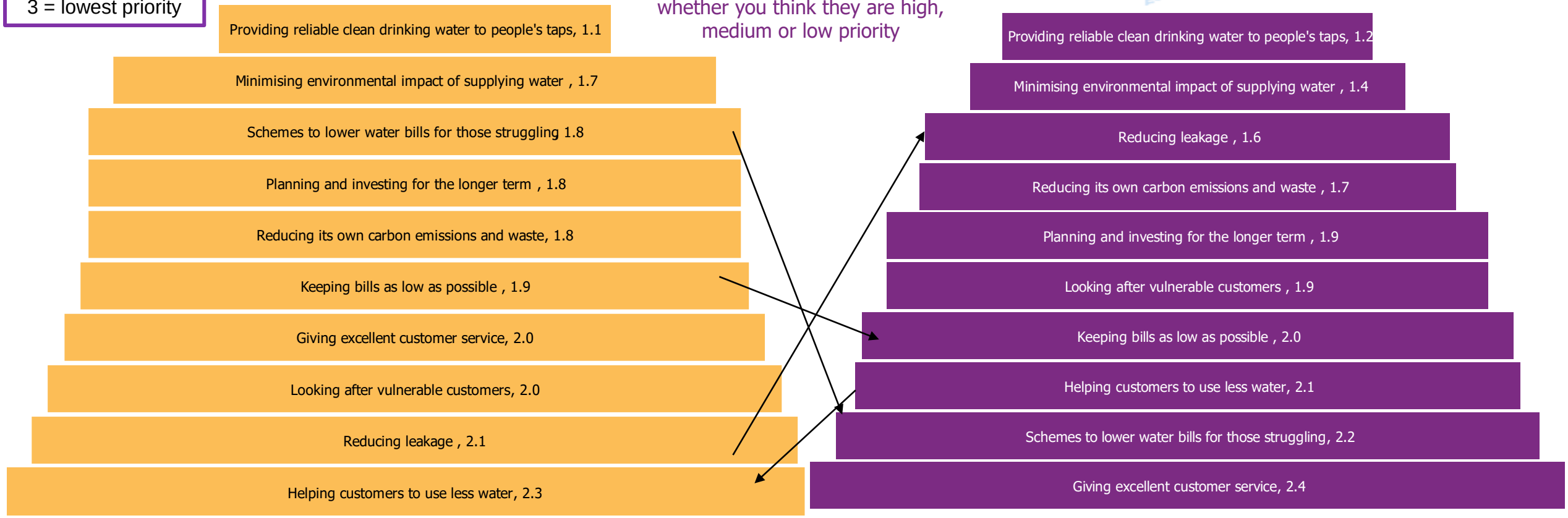
Prioritisation exercise at the start

Mean where 1= high priority, 2 = medium priority and 3 = lowest priority

South Staffs Water

Here are some things that could be a priority for your water company. Please sort all of them into categories to show whether you think they are high, medium or low priority

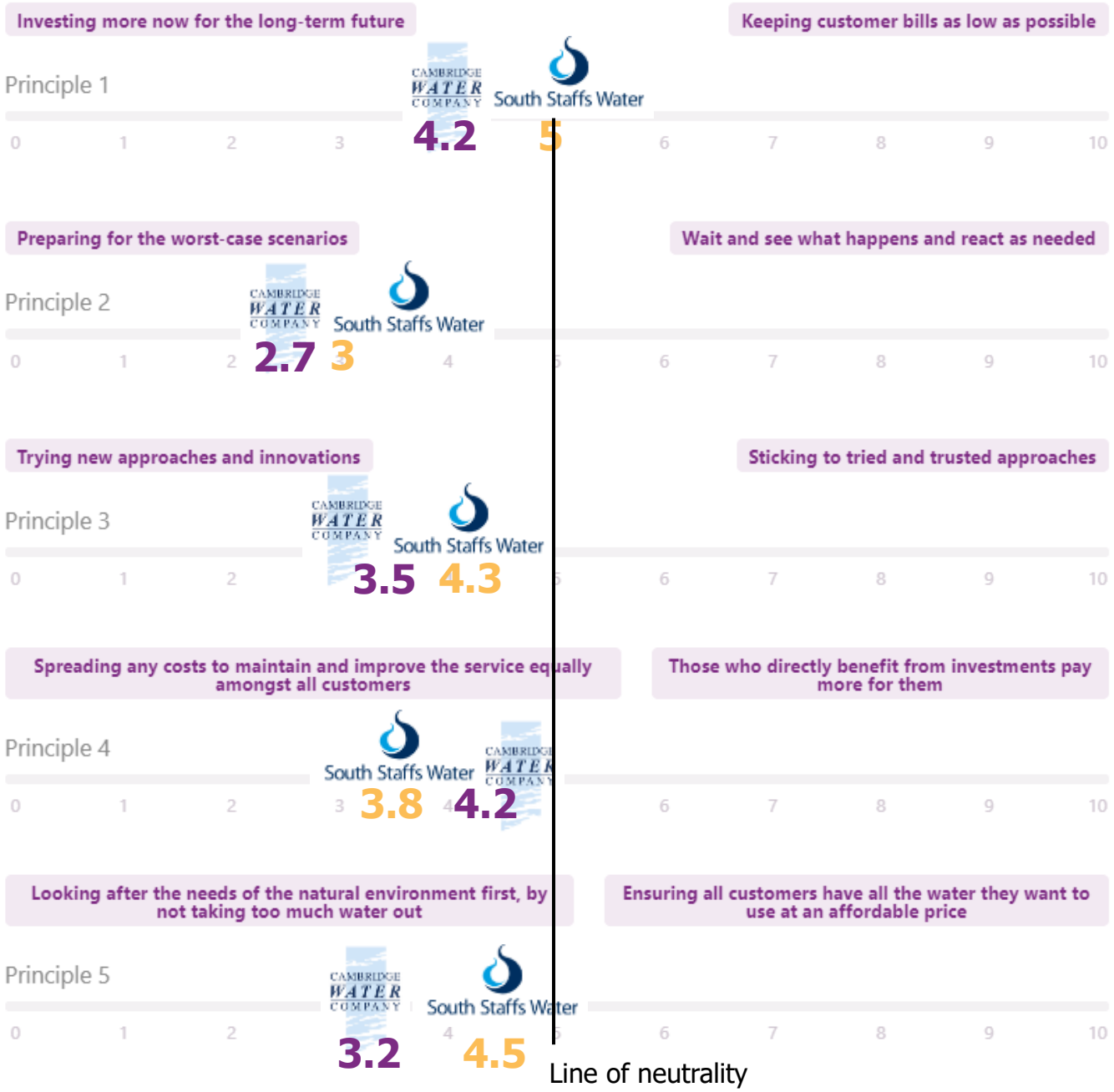
CAMBRIDGE WATER COMPANY



Whilst the top 2 priorities are the same in both areas, thereafter the order of priority is quite different. It should be noted that participants were forced to differentiate and couldn't make everything a high priority and many expressed that they had found the exercise very difficult.

Key principles for the plan (1-5) at the start

Mean scores out of 10



Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.

Key principles for the plan (6-10) at the start

Mean scores out of 10

Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.

Priorities and principles - rationale

South Staffs Water

Most said they found it really hard to prioritise

- Tension between fairness (pay for what you use) vs ensuring everyone is able to pay
- Tension between desire to keep bills low, but believing more investment is needed
- Some prioritise affordability (for them and for others) – more common amongst ABC1 and SME participants
- Some think money is less important than being prepared / innovating
- Difficult to decide relative value of environment
- Wanted investments to come out of company profits

CAMBRIDGE WATER COMPANY

Cambridge also found it difficult but were more likely to prioritise environment

- Common to prioritise environment and planning for future over costs. Failure to invest seen as risking future water scarcity
- Tension between wanting people to use less (e.g. through metering) but not making costs for low income households unmanageable
- Consequently, strong desire to help people understand how to use less
- Couple of mentions of importance of keeping shareholder returns low
- Most agree the decisions were difficult
- Only one (ABC1 older woman) consistently prioritised low bills, though lots expressed no desire to pay more

Priorities and principles – rationale, in their own words

South Staffs Water

As I tried to balance the statements, I took into account the effects on the environment, the ability of customers to pay and I tried to be as fair as possible. Marie (billpayer)

Quite a few of the options were difficult as a customer I want bills as low as possible but as a mother I want to know the future is safe and planned for. Jody (billpayer)

I think a few of the statements go hand in hand such as stopping leakages in pipes and keeping water bills as low as possible. They are just as important as each other because if you have leakages it's a waste of water and people are paying for the water that's leaking but at the same price. In addition, it's a priority to have things be affordable with the prices of a lot of things increasing. Dylan (future customer)

CAMBRIDGE WATER COMPANY

I have definitely tried to balance more towards looking after the environment and planning for the future. Keeping people's bills low may seem tempting and be popular, but will be little use if we face water shortages because of overuse or other environmental issues.'' Sam (billpayer)

I thought about the environment and the impact our water usage may have on it. As a family we try to be mindful of the amount of water we use and educate our children in saving water and not wasting it.

Having been through periods of financial difficulty in the past, keeping an affordable bill is always important to me but also wanting to preserve and protect the environment by being more green and environmentally friendly. These are the questions that I found most difficult to answer as I felt I was pulled in both directions.'' Stephen (billpayer)

Resilience views

Resilience

A series of six short activities, week 1 of the forum.

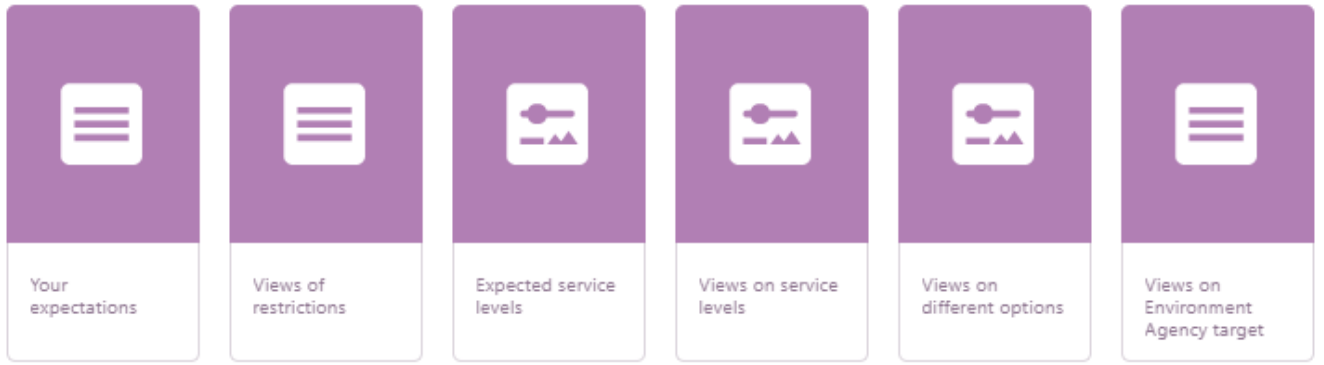
Context

- The regulatory target to be resilient to 1-in-500 is set out in the National Framework. But customers have a choice on when and how this target is achieved and a choice on the reliance on drought permits.

Objectives

- To understand how far SSC should go around resilience ambition?
- How quickly customers want to move from 1:200 to a target of 1:500 resilience?
- Are customers happy with the current level of service for a hose pipe ban (TUBs/NEUs)? Do they want an improvement in the medium term? What would they be willing to pay for it? Would they be happy for more frequent restrictions, if so, what would then want in return - bill rebate, more environmental protection?
- Acceptable frequency of drought permits; such as standpipes and rota-cuts?
- Do customers support harmonisation of the service levels across companies in the same regional area (WRE/WRW)?
- To provide a fuller understanding of customers preference in the context of:
- Their life-styles and attitude to risk in the context of receiving a clean and reliable supply of water – do they want more resilience?
- If expectations have changed since 2017, what has driven this?

Process / approach



Your expectations	Views of restrictions	Expected service levels	Views on service levels	Views on different options	Views on Environment Agency target
Imagine an impending drought. What would you expect them to do?	Video input explaining restrictions. How would these affect you? Do they seem fair /justified? Why?	For each level of drought what service level would you expect? • TUBs – 1 in every x years • NEUs 1 in every x years • Emergency restrictions 1 in every x years	Current service levels shared. Should they do better? Would you accept more frequent restrictions? Should they be the same across regions?	Views on service options: • TUBs every summer. • TUBs every hot summer. • Rota system. • Higher tariffs for those who use more.	Views on EA target by 2040.

Key takeouts

community research

Level 1 & 2 restrictions are acceptable and justified for most

Most expect more frequent restrictions than current service levels

Most believe restrictions should be regional / national rather than more localised

Environment Agency target widely supported

Higher tariffs for heavy users of water widely supported

Expected service levels

South Staffs	Temporary use ban (level 2)	Non essential business ban (level 3)	Emergency drought restrictions (level 4)
1 in every….			
Median	10 years	10 years	20 years
Max	50 years	100 years	100 years
Mean	13 years	26 years	35 years
Current actual	**40 years**	**80 years**	**200 years**

Cambridge	Temporary use ban	Non essential business ban	Emergency drought restrictions
1 in every….			
Median	10 years	15 years	30 years
Max	40 years	50 years	1,000 years
Mean	11 years	18 years	83 years
Current actual	**20 years**	**50 years**	**200 years**

Q. I would expect South Staffs Water to ensure that [restriction] for household customers happens, on average, once in every how many years? Base: SSW 22; Cambs 25

Behind the headlines

community research

Similar in 2017

Surprises / learning:

Timing of last hosepipe ban was a surprise – only 3 participants overall were correct in the quiz with vast majority believing the ban to be much more recent.

Current service levels for restrictions by far exceed spontaneous expectations.

Thoughts / justifications

Restrictions widely seen as hard but fair.

There is a need to take action given changing climate and likelihood of more frequent droughts.

More restrictions will make people more thoughtful about water use.

Restrictions are largely acceptable if they help to protect the environment.

Level system is in tune with expectations - when asked about what they would expect prior to information, many described a staggered system from information to more severe restrictions.

Caveats / limitations

Give reassurance about **planning and preparations** and that lower level restrictions have been implemented in a timely way.

Give people plenty of **warning**.

Look after the **vulnerable** (mentioned by many without vulnerabilities as well as those with specific conditions).

Think about the **impact on businesses** (including those that are non-essential).

Consider **fairness of approach** – willing to accept restrictions as long as other consumers play their part too.

Seek **alternative solutions** – consider educating consumers to reduce demand, fix leaks and find ways to increase water supply.

Very happy with current service levels and comfortable with more frequent restrictions with caveats…

community research

I don't think these are harsh enough if we are to protect our environment for future generations. Am I being too pessimistic??? Selina (billpayer)

Current restrictions

Planned service levels exceed or are in line with majority of expectations. No common traits for few who aren't supportive, women most likely to say plans exceed expectations.

Some spontaneously query if they are too ambitious at a high cost to the environment.

I would have never realised that the level of service as good as this, I think it is amazing that they work towards such big periods of time of not having to was impose these restrictions. Shareen (billpayer)

Any restrictions only acceptable <u>at all</u> if vulnerable customers and employees of non-essential businesses are protected (akin to furlough scheme)

More frequent restrictions

Most would be broadly comfortable with more frequent restrictions but <u>only</u> if the company can prove it's necessary, not their fault and being used to ensure Level 4 restrictions are rare.

Some would be happy to accept further restrictions to protect the environment – others would expect lower bills. Minority call for a rebate/compensation.

Objections slightly higher in SSW. Those who are not supportive are particularly concerned about the impact of level 3 and 4 restrictions.

I would be happy to accept more frequent restrictions at level 2 to about 1 every 15 years if it meant that we would [not] go into any other levels of restrictions & it help save more water & helping the environment & wildlife. Gareth (billpayer)

I think society as a whole would also be widely accepting and see them as justified, as long as it was properly communicated and it was clear that the reasons were environmental pressures rather than neglect by the water companies. Sam (billpayer)

Limited appetite for localised restrictions

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Most believe restrictions should be applied at a regional (or national) level

Applying to whole region / country conserves more water and is 'fair'

Especially if areas with more water can 'help' those with less

Having restrictions over larger area is perceived to make people take them more seriously

I do think that the same service levels would be of benefit across the whole region such as temporary use bans and non essential use bans as I think this would create a bigger impact on how people view it and take it seriously. Shareen (billpayer)

Some suggest this is true for Level 1 & 2 but that Level 3 & 4 should be more localised (if they are unavoidable) and might impact more on some locations than others (e.g. hotter cities might need more water)

Each area restriction should be linked to the amount of water available in the area. This will raise people awareness that it is a local problem and thus lead to them being more proactive in reducing their water usage. Carole (billpayer)

A few suggest that as different companies will have different investment strategies they should not have to support each other

A few want different approaches, including exemptions for people who always need water (farmers) or people who have managed to control their usage, or feedback at a local level on which areas are saving more / less

Higher tariffs for higher users option most supported of all options presented

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Most reject TUBs every summer

Rejected because every summer is different and implies lack of planning. Some call for money back if implemented. Limited support from those who believe won't affect them or if it means Level 4 restrictions won't be needed.

That would annoy me, need to water the plants. Shanif (billpayer)

Mixed views on TUBs for hot summers

People need water most during a hot summer. Wanted precise definition of hot summer and more idea of duration before endorsed. Foresee issues because of more hot summers in future – particularly those in Cambridge liken to a TUB every summer

Again I would be disappointed and would want to know was classed as a hot summer as this could be potentially interpreted differently and abused by water companies who have poorly managed water levels during the year and using this as a get out. Steven (billpayer)

Rotas for TUBs are more supported

Broad support for rotas, especially in SSW. Allows for planning and better than an outright ban. But concern about how policed, potential confusion about the rules and whether it is too drastic a solution.

Every other day would be better than every other week but it is worth a try at least. Lewis (SME – barber)

Strong support for higher tariffs for higher users

Spontaneously suggested by some – positive as long as:

- System takes account of household size and composition
- 'Normal' volume is reasonable (stop company profiteering)

Some in SSW query how it will work for those without meters.

I like the idea of a lower rate if you only use a minimal amount abut [sic] like paying a higher rate of tax. Jody (billpayer)

Broad support for the proposed Environment Agency target

(all companies to reduce the need for rota cuts and standpipes to be used no more than once in every 500 years by 2040)

community research

Most agree with the proposed Environment Agency target but some uncertainty about what is realistic

Some believe it will be difficult to bring companies together so think the timeline is slow but realistic

I think it's better to have a more robust plan than to rush it. Although 2040 feels a long time away it allows the water company to make plans and produce trials that will support the change. Joel (billpayer)

Small number think that 2040 is too long to wait for change

One suggests interim milestones would be helpful

Some believe that the companies will fail to achieve the target unless they also invest in educating customers

Some suggest the ambition is unrealistic given climate change that is already happening

All agree it's a good idea and necessary

I would have preferred it earlier but if it cost less over a longer period then I think it better with this time line. Hanna (billpayer)

A couple think that the longer time frame is important to spread out the cost

Differences between key groups

Regional differences

- Slightly higher number of objections to more frequent restrictions in SSW but majority still in favour. Slight preference for rota'd TUB restrictions in SSW – Cambs more likely to be in favour in principle but identify issues.

SMEs vs Households

- SMEs more likely to raise concerns about restrictions (although other participants are also concerned about the potential impact on businesses given the experience over lockdown)

Future vs current bill payers

- Few discernible differences – mentions of both cost and environmental factors in similar way to bill payers. Future customers very strongly in favour of higher tariffs for higher use.

Demographics

- Those on PSR less willing to accept lower service and / or point to issues and concerns with restrictions because of the impact on them personally
- Women more likely than men to say that current service levels exceed expectations and the small number of participants who are uncomfortable with restrictions tend to be male.

I think the only harmful thing in the restrictions is the potential closure for non essential businesses because that's peoples lives it's how they make money to live off and what we have experienced in recent times with COVID i have experienced first hand how closing businesses down is extremely harmful to everyone involved. Eden (future customer)

I think these would be very difficult to sell to the public given the amount of rainfall we get and so would make the water company very unpopular. They would affect my business very badly as water is a key component in our manufacturing process. Again looking at these options in makes me think that water companies should be nationalised and correct funding going into infrastructure projects to ensure shortages do not occur. Jason (SME – hot tub sales)

Due to health reasons, I am one of your customers that use water for bathing. So the restrictions on the amount of water available to me personally would be dire. Marie (billpayer)

In their words

South Staffs Water

CAMBRIDGE WATER COMPANY

community research

I would expect them to communicate via media about what the current situation is so people are aware. I would expect them to outline ways we can all help and what they are doing. I would expect them to say if it continues then X Y Z will happen. I expect they have a clear plan in place and protect the vulnerable. Jody (billpayer)

I think these measures are acceptable providing the water companies plan and manage effectively to avoid these wherever possible. Stephen (billpayer)

I would accept frequent restriction if the reasons for the restrictions were not the fault of the water company but I would expect them to be doing everything possible to avoid water shortages. I would expect to be compensated for frequent shortages. Frank (billpayer)

Maybe they could perhaps look to limit the water consumption per household? or maybe even charge a higher tariff if you go over a certain limit which would make people think twice before using it unnecessarily. Christian (SME – car leasing)

I suspect I would be considering the water company to have failed in their primary responsibility if level 4 was implemented. Beverley (billpayer)

It's fine to put restrictions in as required. Water is precious. But some will ignore restrictions which annoys me. Simon (SME – soft play centre)

I would be quite happy when methods like these are introduced. I think it's fair and responsible. It would apply to everyone and I hope that everyone would understand exactly why they are necessary. I think that we as a society need to adapt to the environment surrounding us and it's important that we as species try to reduce our harmful impact on nature. Anna (billpayer)

Views on demand options

Managing demand

A series of three short activities, week 1 of the forum.

Managing demand vs supply

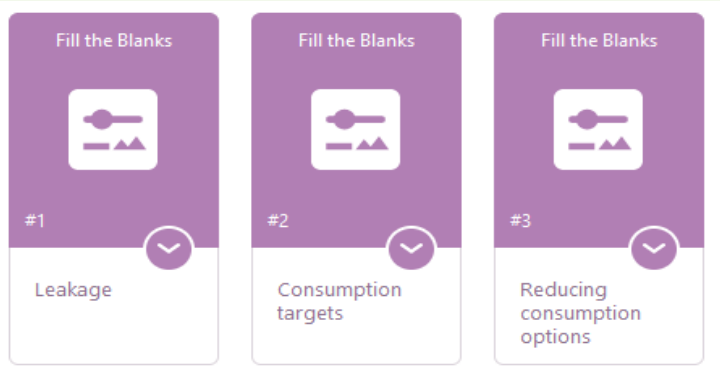
Context

- There is a national target to reduce leakage levels by 50% by 2050 from a baseline of 2017/18.
- Regulatory targets for 2050 set out in the National Framework highlight that the sector needs to reach a PCC figure of 110 l/p/d by 2050.

Objectives

- Do customers support the leakage target or are they prepared to pay more to see the target reached quicker?
- Do customers support consumption targets or are they prepared to pay more to see the target reached quicker?
- What's the best way to get there in terms of a bundle of options given the context of their homelife situation:
  - More meters vs change of occupier vs compulsory metering – what's the preference and why
  - Smart metering with real time data to help them make changes – would this really work?
  - Water efficiency education for customers – soft or more aggressive approach
  - Incentives to save water through tariffs or community driven incentive schemes - should current bill payers shoulder more of the burden?

Process / approach



Video input explaining leakage Views on national targets and speed of achievement	Video input on consumption targets Views on targets, including more ambitious version Balance between persuasion and coercion	Infographic showing various options to reduce consumption Views on: • Water meters • Higher tariffs for those who use more. • Preferred mix

Key takeouts

Managing demand vs supply

Leakage a key priority but mixed views on the 2050 national target

Similar in 2017

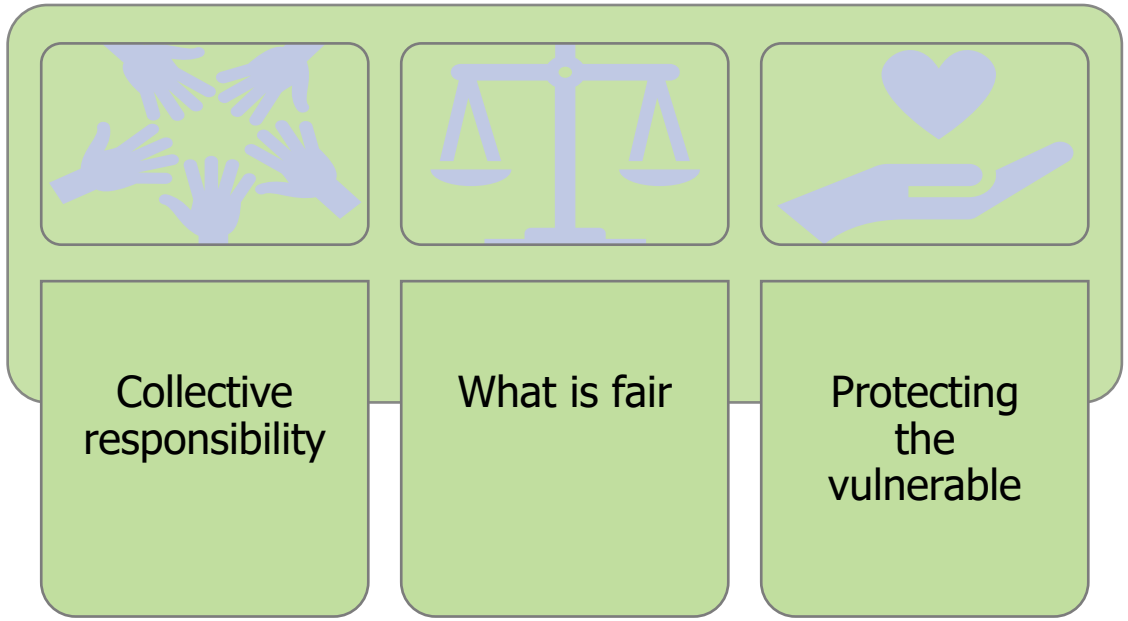
Call for greater ambition in terms of speed of PCC reduction to 110/p/d, but not going further

Strong agreement with compulsory meters

Stronger than 2017

Support for higher tariffs once usage goes over a set amount (with caveats)

Key themes when thinking about managing demand…



Behind the headlines

Managing demand vs supply

Surprises / learning:

Most believed that leakage had increased over recent years and were unaware of the extent of the issue.

There was some surprise over the proportion of leaks from customers' pipes.

Also, some surprise about how much water they/the average consumer uses each day.

Thoughts / justifications

Leakage should be tackled because treated water is a precious resource.

Strong belief that technological advances will be key in meeting targets in terms of both reducing leakage and consumption.

Options relating to metering and higher tariffs for higher use were generally supported.

Caveats / limitations

Some mentions of concern about disruption and cost of tackling leakage.

Reducing consumption is a collective responsibility – consumers need support and information; the water company and housing developers need to play their part as well as appliance manufacturers etc.

Need for protection for large families and vulnerable customers top of mind for many (as well as reassurance that changes to tariffs won't benefit the water company in terms of additional profits).

Leakage is a priority but mixed views on targets

Managing demand vs supply

Leakage is a clear priority:

1. Clean water is a precious resource and loss through leakage feels 'wrong'.
2. It is assumed that the issue will be exacerbated by population growth.
3. Technological advances will help achieve targets – many mentions of this as a justification for expectations.
4. Little evident concern about associated disruption.
5. Educating consumers about leakage from their pipes is key – some suggest incentives to tackle.

A minority of participants spontaneously mention cost – no clear pattern but slightly more bill payers (as opposed to future customers) and SSW customers

I would have thought with all the advances in technology it would be possible to identify and locate leakages quickly and so reduce wastage quite a lot over the next 25 years. Mary (SME – hotel)

I was quite shocked to hear that 5 swimming pools are wasted every day! I don't really understand how that's possible, but it makes me quite sad. Anna (billpayer)

Happy with 2050 target to reduce leakage by 50% from 2017/18 levels?

Around half of participants (slightly more in SSW) happy with target given challenges and associated cost/disruption of addressing… as long as:

Convinced about effective planning.

There is communication with customers about their role.

There is a strong call from both regions for **interim targets** to ensure on track

Half of participants (slightly more in Cambs) call for **more ambition** because of the urgency of the issue & the need for action. Some mentions of technology to facilitate achieving the target.

Call for greater ambition on reduced consumption timings rather than PCC targets

Managing demand vs supply

community research

National PCC target of 110 litres per person per day by 2050 felt to be challenging but a necessary step

It is achievable as long as:

- Customers are educated and incentivised to changed behaviours
- There is investment in changing infrastructure (water recycling, water efficient appliances) and developers are encouraged to build houses which help consumers use less water.
- Businesses are also set targets to reduce consumption.
- The impacts of the pandemic in terms of increasing PCC are not long term.

I would like to see this achieved more quickly if possible by 2040 as we could save a huge amount of water between 2040 and 2050 allowing for population growth. Marie (billpayer)

Appetite from nearly two-thirds for greater speed to achieve target

Many feel that the aspiration should be for the target to be 'the sooner the better' – there is a need for action; 30 years is too long to wait and the company should be ambitious. However, some are more cautious and mention that behaviours can be slow to change.

Target of PCC of 80 litres per person per day felt to be a step too far

The vast majority felt that this target was too ambitious and unrealistic. There was some call for interim targets.

We need to do it in stages ….using the data to understand if we can drop this even further, targets are great but need to be realistic and well measured. Joel (billpayer)

Most feel that a mix of options should be used to reduce demand

Managing demand vs supply

General consensus that communication and education needs to be used in conjunction with more interventionist measures.

Consumers need to be convinced of the need to change behaviour and information needs to pave the way to ensuring acceptability of more stringent measures.

Call for education to start early in schools and widespread support **for free water saving** devices

As well as support for action on metering and tariffs, widespread support for customer incentives (particularly free water saving devices) and any activity that suggests 'we are all in this together'

I think using a mixture of smart meters, and free education with personalized advice and free devices that save water would be the most useful so that people can make their own proactive choices and decisions. I thin these are my preference because it does not feel forced, and it feels like something that both the water company, and the community are working together to combat. Eliza (future customer)

Mix but also show your customers that you are actively looking at ways to reduce water usage yourself by lobbying the government into putting pressure on manufacturers to invest in water-saving technology: flushing systems, washing machine, dishwashers, carwash, etc. Carole (billpayer)

High levels of acceptance for compulsory metering

Managing demand vs supply

community research

Spontaneously suggested

Around half (similar in both regions) spontaneously suggest compulsory metering in response to initial question

Stronger than 2017

Broad consensus over acceptability

- It's the way other utilities are charged for
- Will help reduce consumption
- It's fairer

I support the notion of installing water meters because it would assist with the other areas the company wish to invest in. e.g. customers will become more aware of their usage, lower their consumption and benefit by lowering their water bill…educate each other on reducing water consumption…This would hopefully ensure less restrictions. Luke (billpayer)

If some are protected

With particular mention of those with large families

I think it is a great idea because it is only people that use an excessive amount that would moan. If they are wasting or using too much then they would have to pay for it or change their practices. Jody (billpayer)

And some further caveats

As long as it's a fair price and benefits are communicated

Handful of dissenters – 5 in total - 3 men aged 40+ disagreed on principle; 1 who prefers known bill to budget & 1 SME not on a meter.

Support also evident for higher tariffs for higher use

Managing demand vs supply

Most liked the principle of people paying more when they use over a set amount of water, but their agreement was more conditional than for compulsory water meters. Only 2 in each region rejected outright

There was concern about the impact on large families – particularly those on low incomes

The impact on those with health conditions was also flagged (typically by those on the PSR register)

That would be understandable as it makes sense to me that customers who use more water should pay for more water. I would only think this would be unfair if this was also applied to low income households who may not be able to afford the extra cost. Alice (future customer)

One SME agreed in principle with households being charged in this way but not businesses; some household customers only agreed if the same principle applied to businesses

Some suggest that a better approach would be to offer a lower price for lower use as this would be more of an incentive to change behaviour. Two suggested a more sophisticated banding system

The concept was spontaneously suggested at an early stage in discussions as a fair way of encouraging reduced consumption

If you use the water, you should pay, but also if you use less then your tariff charge decreases. Gareth (billpayer)

One raised the issue of tenants being charged high prices because of an unfixed leak

Differences between key groups

Regional differences

- Slight tendency for Cambs participants to be more optimistic about targets (leakage and PCC) than SSW. Both regions had similar views on compulsory meters and higher tariffs for higher use, although SSW were slightly more likely to mention issues regarding low income consumers and cost in relation to the latter.

SMEs vs Households

- There were no clear cut differences.

Future vs current bill payers

- Future customers were more likely to feel that reduced PCC targets were achievable than bill payers.

Demographics

- Some PSR customers were less likely to feel that reduced PCC targets were realistic (potentially because of their greater water use).

Managing demand vs supply

It would be an amazing feat to achieve the ambition and reduce the national target [for PCC] before 2040. This will take a lot of hard work but 'never say never' Cambridge Water could give it a good try. Madeline (SME – florist)

I think this is an important target – and I think it is relatively achievable . It will take that amount of time to educate people into ways to reduce water use. Aleksi (future customer)

I think it's going to be very hard to get people to reduce their water usage to this amount. Hanna (billpayer)

In their words

South Staffs Water

CAMBRIDGE WATER COMPANY

Managing demand vs supply

community research

I think that's a sensible target [leakage] there are lots of factors to like where the money will come from and disruption to local communities that need to be thought of and 50% by 2050 is a reasonable achievement. Eden (future customer)

I feel that it is essential for the planet, wildlife and environment that the amount of usage is reduced asap, 2050 is a long way off and potentially damaging moving forward. So the more people are aware of that target the more effective it would be. Sarah (billpayer)

I would personally like them to reduce leakage within 10 years. Therefore, I would like this to be achieved by 2031. I believe this target is very important, as within 10 years, we will loose a fast amount of water, to which is precious and needs to be taken care of. Emma (future customer)

I would be happy for more frequent restrictions if it helped the future supply of water, the only thing I would expect in return would be to have notice if this was going to happen. Asma (billpayer)

I think the best options are to educate everyone, especially children in schools, giving them ways to save water at home and making it fun for them. Then a mix of having meters installed so people are aware of their water usage and using tariffs as an incentive. Abbie (future customer)

Metering makes sense as customers who pay for what they use are obviously going to be more conscientious about wasting water. If we educate the young and current consumers that could make a huge difference. I've learnt so much this week. Most people just assume the water magically appears at the tap and that there's a never ending supply. Marie (billpayer)

Supply Options and Balance

Supply options and balance

A series of five short activities, week 1-2 of the forum.

community research

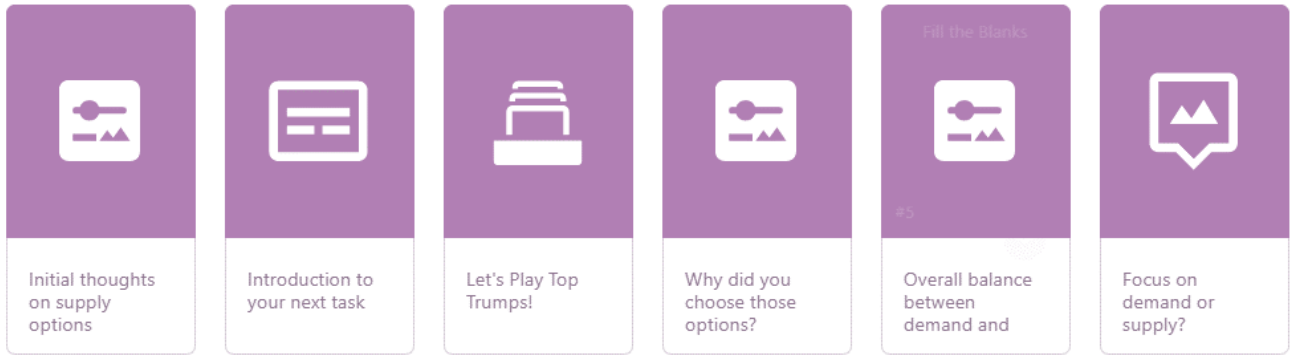
Context

- Looking at supply options in detail was not intended at this stage.
- However, key supply options were outlined at a high level, differing slightly in each area.

Objectives

- To inform WRAP members about the possible supply side options.
- To get a sense of WRAP members' immediate reactions to supply side options.
- To understand which of these options appeal most and why?
- To get a sense of where WRAP members would want to see the balance between demand and supply.

Process / approach



Video input explaining options. What is your immediate response to the various options you have just heard about? Which of these options do you prefer and why? Are there any you would rule out straight away?	Top Trumps exercise with demand and supply options. There are 9/10 options below that the water company could choose to pursue in their plan. We would like you to choose your top three only. Have a look through all the options. For the plan to meet future water needs in this area your chosen three options should ideally have at least 5/6 water drop symbols between them.	When thinking about the different options, what was important to you when weighing up which you preferred? What was the most important factor when weighing up which you preferred?	How would you feel about a plan that relied mainly on water companies managing / reducing demand Why? What about a plan that relied mainly on increasing supply?	Please mark using ONE pin where you sit on the scale in terms of how you would like South Staffs/ Cambridge Water to balance their plan.

Key takeouts

Abstracting more water was an unpopular choice in both areas

Similar in 2017

Many want a balance between demand management and increasing supply

Demand management options come first for many. Supply solutions a last resort for some

Similar in 2017

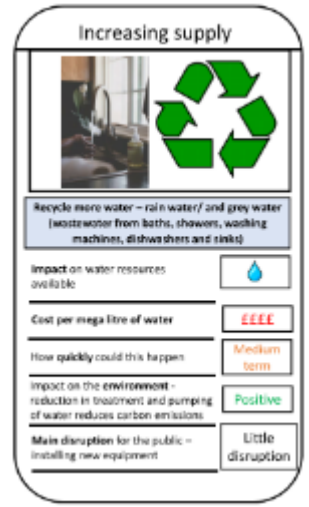
Negative environmental impacts are to be avoided

Stronger support for compulsory metering in Cambridge than in South Staffs

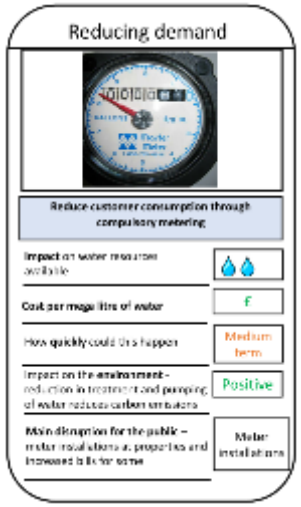
Supply options

Top three options

South Staffs Water



CAMBRIDGE WATER COMPANY



Behind the headlines

Supply options

community research

Surprises / learning:

Some were surprised that the possibility of water transfers could be considered.

There was a warm reception for recycling – particularly the idea of greywater recycling.

Some immediate concerns expressed (following introduction of the options) about the environmental impact of further abstraction.

Thoughts / justifications

Many were concerned to avoid / reduce further abstraction if at all possible.

Abstraction options were the least popular in both regions – negative environmental impacts were seen as a key reason to reject abstraction options.

The various factors to consider were weighed carefully. Many talked of a balanced programme in terms of demand vs. supply; high vs. low cost; and short vs. long term.

Caveats / limitations

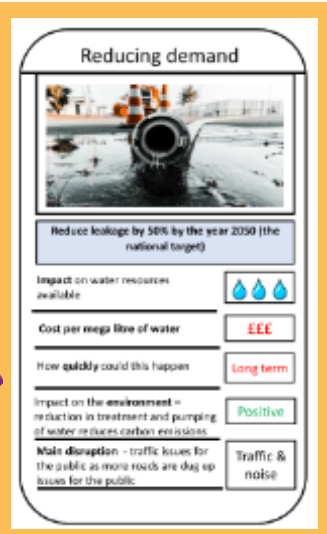
Whilst many sought balance, some expressed the view that demand management options should come first, with options to increase supply only being pursued if absolutely necessary.

If pursuing demand management measures (metering, restrictions and education) this will need to be carefully explained and communicated to the public.

Top Trumps choices – South Staffs

Half of the participants put these (three most popular choices) in their top three options

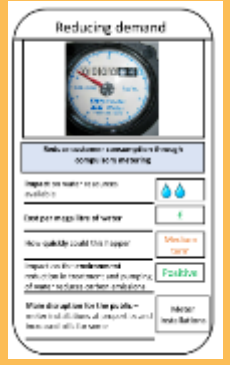
Most chose a mix of demand and supply side options. 1 participant picked all demand-management options, whilst 3 picked all supply side options.



Reduce leakage by 50% by the year 2050 (the national target), 11

Recycle more water – rain water/ and grey water , 11

Trade (bring water in) from another water company / region in the country , 11



Reduce customer consumption through compulsory metering , 7

Increase storage capacity – through making existing Blithfield reservoir bigger , 7

Imposing regular restrictions: e.g. annual use of more temporary use bans, increased tariffs., 6

Reduce customer consumption through education / advice campaigns , 6

Recycle effluent water - treated water being put back into rivers to increase river flows , 4

Take (abstract) more water from rivers and streams , 3

Supply options

The number shown = the number of times this option was placed in WRAP members' top three choices.

No-one chose: 'Take (abstract) more water from underground sources' in their Top 3 choices.

Top Trumps choices – Cambridge

Supply options

A more popular option in Cambridge

Reduce customer consumption through compulsory metering , 17

Reduce leakage by 50% by the year 2050 (the national target), 12

Reduce customer consumption through education / advice campaigns , 8

The number shown = the number of times this option was placed in WRAP members' top three choices.

Almost all chose a mix of demand and supply side options. Just 1 participant picked all demand-management options, and no-one chose all supply side.

Recycle more water – rain water/ and grey water , 13

Increase storage capacity – through large projects (e.g. build new reservoir) , 8

Imposing regular restrictions: e.g. annual use of more temporary use bans, increased tariffs., 6

Recycle effluent water - treated water being put back into rivers to increase river flows , 6

Trade (bring water in) from another water company / region in the country , 4

Take (abstract) more water from underground sources , 1

Reasons for choices made

South Staffs Water

CAMBRIDGE WATER COMPANY

- In both locations, participants had weighed the various criteria and sought to achieve a balance.
- For most this included a balance between supply and demand side options.
  - Those few that picked options from one side or the other had specific rationale (see examples).
- Negative environmental impact was often cited as a reason to reject options.
- Cost and the impact in terms of water resources available, were then frequently balanced in the thought process.
- Participants also described choosing a mix of short term and long term options.
- Most participants chose a mix of supply and demand side options (as shown on previous slides.

Supply options

community research

The building of reservoirs is a no brainer. Yes, it causes a lot of disruption and will take a while to come to fruition, but long term, we don't have a choice. The other two [both water recycling options] *causes much less disruption and is a more realistic short-term measure.*
Ivan (billpayer) (chose all supply side options)

The least impact on the environment came first, then I look at cost compared to the impact on water supply. Although I like the idea of recycling water grey water/rainwater, the cost involved is much higher than I thought. I would have chosen that option had it not been so expensive. I wonder if this is including maintenance or if that's the initial cost and the cost becomes less once it's in place (like the reservoirs). If this is the case than water recycling would be on my list of 3. Trading water seems to be a good option as well but I discarded it for the potential impact on the environment. This solution was equal third place in my opinion.
Carole (billpayer) (chose all demand side options)

In their words – reasons for choices made

South Staffs Water

Definitely the effect that this has on the **environment in the long term** is the most important factor that I am looking at. Although the cost is important, it is essential to look after the environment as well. Eliza (future customer)

I think all factors are equally important, though options that **cost less and provide long term benefits** with low impact on the environment are preferred. Abbie (future customer)

I did not want to pick anything that could **harm the environment**... So, for me to agree, it would have to be a last resort ....[then] I **balanced the amount of water we would get compared to cost.** Shareen (billpayer)

Impact on water resources, the cost of action now may be high but not as high as it will be in the future. Also, the indirect cost for businesses and the wider economy of 'kicking the can' may cause massive disruption and cost in the future at a time when we are all trying to recover from the effects of CV19 and Brexit. Jason (SME – hot tub sales)

CAMBRIDGE WATER COMPANY

Supply options

I guess I was trying to minimise both **environmental impact and disruption, while also minimising cost**. Of those, environmental impact is probably the biggest in my mind. Beverley (billpayer)

Impact to the environment and the benefits gained were the most important things for me. It seems to me we are going to have disruptions, but these are disruptions that will benefit us all in the long run. Selina (billpayer)

The most important factor was **cost and environmental impact**. I know that while preserving the environment is important its also expensive to implement water methods which are beneficial to it. I believe that methods such as water recycling of grey water are long term goals which are slowly implemented over time. As a result I needed to look at options that were less expensive and could still invoke positive changes. Alice (future customer)

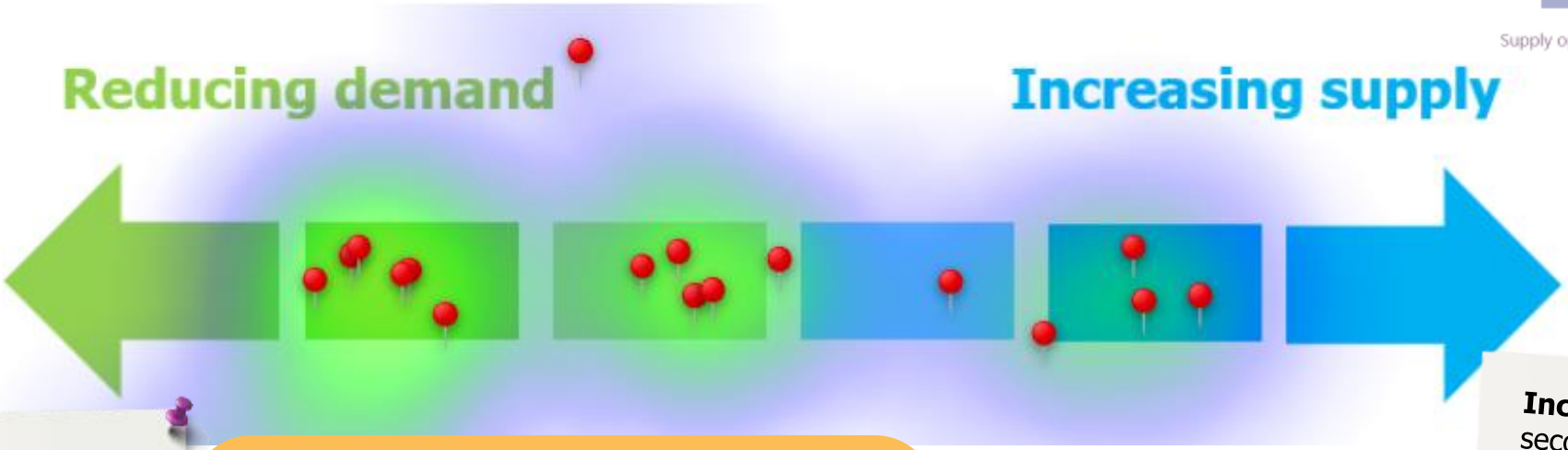
I like the idea that some of the options could be achieved in a **fairly short time** for example the compulsory water metering which I anticipate could probably be rolled out over 5 years?? This would **make an impact on water usage straight away**. Recycling of water is another area where once customers have been given advice, they can start to recycle their waste-water. The cost of this option would be minimal but may need to include the provision of free water butts....The two options above come at a fairly **low cost with minimal disruption** to customers. Madeleine (SME – florist)

The balance – South Staffs

Supply options

community research

Please mark using ONE pin where you sit on the scale (the coloured arrow) shown below in terms of how you would like South Staffs Water to balance their plan.



For many, **demand side options** were preferred and seen as the first choice.

They were seen as:

- Cost effective
- Common sense
- Environmentally sound

BUT

- Potentially difficult for businesses and large families.
- Reliant on behaviour change / education, so uncertain.
- May cause resentment – so requiring good communication.

As much as I would love to have more supply of water, I know that the impact to the environment is mostly negative and if there is more water supply the consumption will increase and we will still be in the same position. However, I feel like our way of life requires more water maybe because we have taken things for granted. Dylan (future customer)

I think customers definitely need to reduce their demand and stop taking water for granted. If people were supplied with water butts or saving devices this would make usage reduce, but relying on customers solely might not work. Jody (billpayer)

As the population increases its going to be extremely difficult to manage water based on just reducing usage as the more people there are the less each person should be using per day. So going forward long term the best option is increasing supply before it gets to this point. Shareen (billpayer)

Increasing supply is secondary option or even last resort for some.

Others see this as inevitable to meet long term challenges and call for a balance between demand and supply side options.

Cost, environmental impact and disruption are cited as concerns.

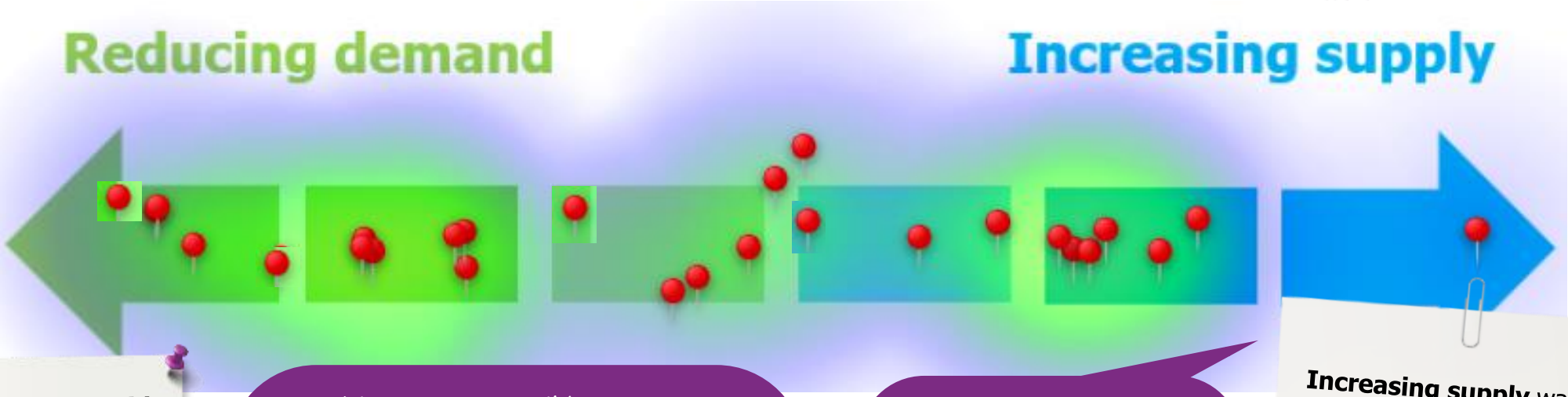
Questions whether too much emphasis on increased supply might lead to further waste / taking water for granted.

The balance – Cambridge

Supply options

community research

Please mark using ONE pin where you sit on the scale (the coloured arrow) shown below in terms of how you would like Cambridge Water to balance their plan.



Again, many saw **demand side options** as the first choice, but there was a strong call for a balanced plan.

Recognition that demand side options might not be sufficient, on their own, to allow for the needs of an increasing population.

There is a limit to how far these can solve the problem.

This seems a sensible way to go, because the vast majority of people I think use water fairly unconsciously, which in my opinion needs to change along with use of other resources (energy, oil etc). If we're all allowed to just keep using water as we see fit, then we're just going to keep exceeding supply and having to use more and more water with all the damage that entails. Which seems silly when there are ways to reduce what we use without stopping anyone from getting the water they need. Beverley (billpayer)

With the expected increase in population for the area, to neglect increasing/finding new supplies would be a mistake as there becomes a ceiling to how far water consumption can be reduced. Steven (billpayer)

Increasing supply was again seen as a last resort, but one that may well be necessary to cater for longer term need.

Some strong concerns expressed about the scale of the investment and the environmental impact.

Use the supply we have got. Investing in something we may not need is crazy. Simon (SME – soft play centre)

Differences between key groups

Supply options

community research

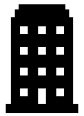
Regional differences

South Staffs Water

CAMBRIDGE WATER COMPANY

- Reducing leakage and recycling of greywater were very popular options in both areas.
- The idea of compulsory metering was favoured much more strongly in Cambridge that in South Staffs.

SMEs vs Households



- No SMEs in South Staffs chose compulsory metering within their Top 3 options.

Future vs current bill payers

- In South Staffs, compulsory metering was picked as one of the top three options by 3 of the 4 future customers. It was a much less popular option amongst current customers.
- Likewise in Cambridge, 4 of 5 future customers chose this option, although in this region it was a more popular choice for all.

Metered vs. Unmetered

- Although it might have been expected that unmetered customers would show less support for compulsory metering this did not appear to be strongly the case (although clearly this is not a quantitative exercise). In both areas a number of unmetered customers did endorse this choice within their Top Three.

All the choices has its pros and cons, but considering environmental issues, cost factors and I think these options will be beneficial for future usage with sustainability in mind, cost and long-term goals. Helal (billpayer)

I thought that the reservoir would be a good long-term investment which will benefit the area for many years and provide a large water source although I do understand it is a very expensive project. The recycling of water is a great way of re-using rainwater for the garden which will save on hosepipe usage. I am very keen on compulsory water metering, this surely has to be at the top of the list for the water company? Madeleine (SME – florist)

The environment

The environment

A series of two short activities, week 2 of the forum.

Context

- Companies need to reflect their region's environmental destination in their plans.
- There are minimum abstraction targets that customers need to hit, but customers then have a choice over how far SSC should go around environmental ambition and how far they are prepared to pay for any improvements?

Objectives

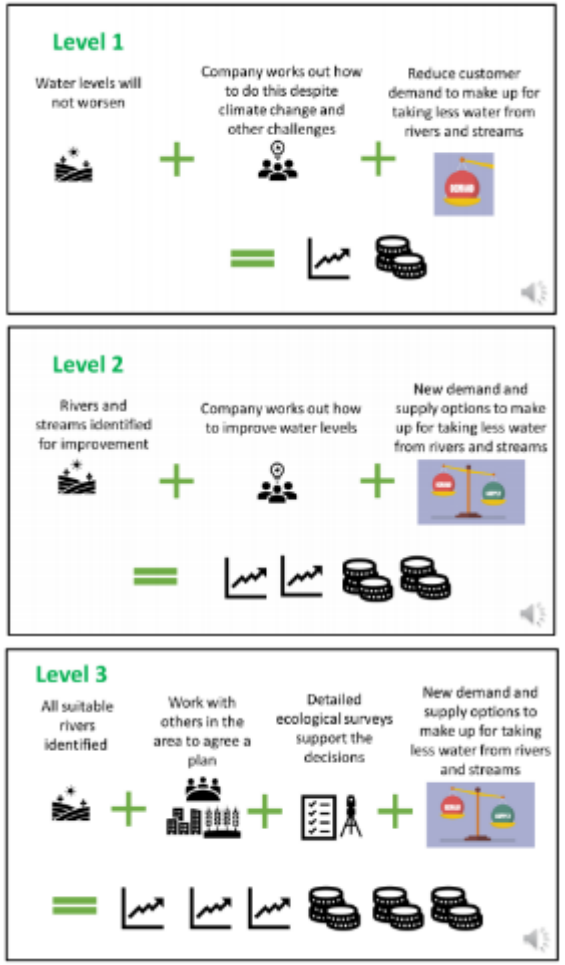
- Do they want SSC to go beyond the minimum of non-statutory sustainability reductions of abstractions. If they support this, how far do they want SSC to go?
- If they support going beyond the minimum, how quickly do they want to see these improvements made?

Process / approach

Spontaneous thoughts on issues and role of water companies.

Video input explaining 3 levels of environmental ambition.

Preferences about levels and speed of action.



Key takeouts

community research

Pollution (most widely mentioned) & water shortages dominate concerns about the water environment

Ambitious target (level 3) most popular, despite cost. Worth it to ensure supplies & protect environment

Chalk streams mentioned by a small number of Cambridge participants (after information provision)

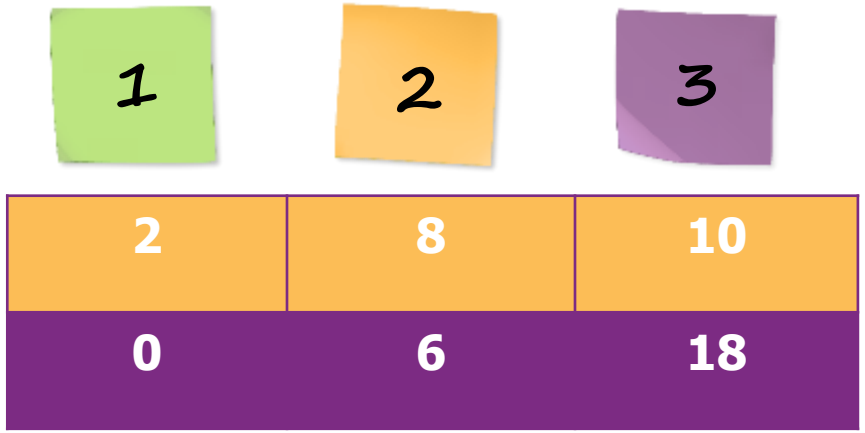
Water companies have a central role in caring for water environment – but everyone else has a role too

No clear preference for timetable – but 20 years seems a reasonable compromise

South Staffs Water

CAMBRIDGE WATER COMPANY

Preferred level of environmental ambition



Q. Which of the three levels of environmental ambition that you have heard about would you like the company to achieve? Base: SSW 22 (2 not sure); Cambs 25 (1 not sure)

Behind the headlines

community research

Surprises / learning:

For many the information provided just increased awareness and reinforced what they already knew and felt.

- Some surprise in the quiz about the carbon emissions caused by the water industry and the loss of wetlands. The information on chalk streams was new to some Cambs participants

Also, some participants (mainly in South Staffs) were surprised to learn:

- How many problems face the water environment.

- The impact of taking water from the environment.

- How much water companies do to protect the water environment

Thoughts / justifications

It makes sense to customers that water companies should protect the water environment, in order to ensure water supply and to protect nature.

Protecting the water environment is **seen as valuable,** so ambitious targets (levels 2 and 3) are worth achieving, even at a cost.

Dealing with wastewater was mistakenly seen as within the remit of Cambs and South Staffs water.

Caveats / limitations

Work with others to protect the water environment – water companies are just one of the many stakeholders with a role to play.

When setting targets and timetables, **weigh up what is practical** (in terms of cost, timetable, disruption etc) against **what is ideal** for the environment

If opting for ambitious targets, ensure the cost is acceptable to customers, and involvement of stakeholders is not onerous/overly time-consuming.

When communicating with customers about the water environmental problems, **recognize that awareness and concern varies**.

Pollution and water shortages dominate concerns about water environment

community research

Water pollution

Most widely mentioned. Discussed plastics, FOG, industry, and (in Cambs) farming & sewage.

Seen as an immediate and major concern, can affect both human health & nature.

The amount of poison that is released into our rivers. OK the water gets treated once it gets to us but you cannot get rid of every bit of it. What damage is it doing to the world around us? Ivan (billpayer)

Water shortages

Fairly widely mentioned.

Discussed shortages & droughts, supply side issues (e.g. changes in rainfall from climate change, leakage, groundwater depletion) & demand-side (e.g. increased water use in hot weather, "thirsty" crops.) Tended not to be seen as an immediate concern.

I am seriously concerned about the future water shortage issues that will affect my son and the generations that follow and impact on the environment including the loss of many varieties of wildlife. David (billpayer)

Other points

Other issues raised: flooding, and loss of habitats & species.

A few participants (mainly in South Staffs) admitted little knowledge of water environment problems or little concern about them.

Weather in general. Not really [a concern] to be honest. Andy (SME – dairy)

Drought, flooding, development. All bother me, especially after experiencing significant development around Cambridge over the last 10 years. Annmaria (SME – nursery school)

Water companies have in important role in protecting water environment – but others do too

All agree that water companies have a role to play.

Water companies were expected to ensure they were not taking too much water from the environment and not polluting.

Making sure that they don't take too much of the water from the environment that it harms the wildlife and ecosystem. Hanna (billpayer)

In Cambridge we are lucky to have rare chalk streams, these need to be protected therefore I would like the company to take measures to ensure the water level is maintained by educating customers not to waste water and be very very quick to stop leakages. Barbara (billpayer)

Participants unaware (until informed) that dealing with wastewater was outside the scope of a water only company.

The water company must ensure that they dispose of sewerage according to the law. Mary (SME – hotel)

Others with a role in protecting the water environment include: the public, government (central & local), regulators (mainly EA), farmers, house builders and business in general.

I would expect the govt via the EA to take the leading role and give water companies clear instructions, guidance and targets to sustain and improve the environment. Jason (SME – hot tub sales)

Some saw water companies taking the lead. Others saw their role as secondary.

Water companies' responsibilities include educating the public on what they could do to protect the water environment and working to help businesses reduce their impact e.g. reduce pollution.

Ambitious targets (level 3) most popular, in spite of cost – but level 2 also acceptable

community research

I think level 2 would be more realistic. Level 3 would be a better option, but how many years would it take to come to fruition? Would people want their water bills hiked exponentially? Ivan (billpayer)

Level 2

Fairly popular in Cambs and South Staffs.

Sometimes a tough choice between levels 2 and 3. Level 2 seen as more realistic, mainly because lower cost, faster, does not rely on stakeholders.

Also seen as a good starting point, leading to more ambitious targets in future (not widely mentioned).

I think option 2 is more realistic as an ambition for change that Cambridge Water could achieve then begin to slowly adapt to level 3. Alice (future customer)

Level 1 received no support in Cambs and hardly any in South Staffs.

Very few mentions - seems to have been barely considered.

Level 3

By far most popular in Cambs, slightly more popular than level 2 in South Staffs.

Seen as the ideal option, to ensure supplies and protect wider environment.

Noted higher cost than level 2. But those who chose level 3 considered it worth the cost, mainly because it is comprehensive (not a 'sticking plaster' approach), invests in the future, and draws in stakeholders.

Might be difficult to achieve. But if aim high, this will achieve a lot, even if not all targets are reached (rarely mentioned).

You would want it to be level 3 because it would make sure the water is protected at all times. Ben (future customer)

I would be inclined to go for level 3, the most expensive option but also the most practical and thinks about long term strategy... Sometimes you have to invest a bit more on these long term decisions but also make sure that you have engaged as many people as possible along the way. Joel (billpayer)

Mixed views on timetable but 20 years seen as a good compromise – good for environment & achievable

community research

10 years best for environment

Strong support in Cambs, some support in South Staffs. Mainly because of the need to take steps to protect the environment urgently; and a few even suggested a shorter timetable because of the urgency. Also short timescales provide focus (rarely mentioned). But 10 years was often rejected as unachievable.

Anything else could be too late. Annamaria (SME – nursery school)

30 years is too long and it could of gotten to the point of no return, 20 is in between 10 and 30. This means that it is far away but not to far to change. Ben (future customer)

20 years seems a good compromise

Strong support in Cambs and South Staffs. Seems a good compromise: addresses environmental needs fairly quickly; and allows enough time/seems achievable. Time is needed to plan, try things then adjust, change attitudes, build partnerships, and carry through large complex projects. Occasionally noted that they do not really know how long things take – and some evidence that they overestimate e.g. a participant suggested 20 years is needed to achieve full metering in South Staffs.

20 years feels like a stretch, but achievable (not that I really know the ins and outs of what is involved). The sooner the better, but 10 years I'm guessing is probably not realistic. Beverley (billpayer)

30 years most feasible

Some support in South Staffs, very little in Cambs. Support was mainly because 30 years seems more feasible than the faster timescales. Also least disruptive for customers (rarely mentioned). But widespread concerns that it could be too late for the environment. So a lot needs to be done early in the 30 year period. No-one suggested extending the timetable beyond 30 years.

I just appreciate that these things probably take longer than you think. If we can do it quicker [than 30 years] then great. Christian (SME – car leasing)

Differences between key groups

community research

Regional differences

South Staffs Water

CAMBRIDGE WATER COMPANY

- In Cambs there was more detailed knowledge about water environment problems, more support for ambitious targets (level 3), and slightly more support for faster timetable compared to South Staffs.

> Level 3 would take up too much time (when they consult farmers) and they have such different needs/ requirements you would never be able to please all of them. We shouldn't be penalised for where our farm is located.
> Emma (SME – farmer)

> My preferred level would be level 3….I know this level would be expensive & to complete would be the long term. But is important to make sure we have effective & high quality water for businesses & residents but also for the environment & wildlife that will last for years. Gareth (billpayer)

SMEs vs Households

- There were no clear differences between SMEs and households, perhaps because some non-SME participants considered the needs of businesses (see quote). However, a farmer had a personal perspective on the difficulty of consulting farmers, something she understood would happen as part of level 3 (see quote)

Future vs current bill payers

- Perhaps surprisingly, future bill payers were no more ambitious (and were possibly slightly less ambitious) than current bill payers. Almost all of them supported a 20-year timetable, with only one supporting a faster (10 year) timetable. They were evenly split between supporting level 2 and level 3 targets.

> Level 2 gives more protection to the environment… and it is a middle ground solution in terms of costs to the customers. Linda (billpayer)

> I understand that these improvement will take a while to put into place and organise which is why I didn't go for 10 years as it may be unachievable to do within that time but 30 years is way too long. Improvements do need to be made ASAP before there are longer term consequences.
> Abbie M (future bill payer)

Demographics

- Women were slightly more likely than men to support level 2 (about ½ of women vs about 1/3 of men). They focused particularly on is being more achievable and realistic than level 3.
- There were no clear differences with SEG or vulnerability. Lower SEGs were no more likely to consider cost when choosing targets and timescales for environmental improvements.

In their words

South Staffs Water

CAMBRIDGE WATER COMPANY

community research

Adverse weather conditions like heavy rain and flooding, and droughts. Also, pollution by people putting things down their sinks and disposing of things into rivers, lakes and canals. Paul (billpayer)

I would definitely want [South Staffs Water] to fight against pollution and help to protect the water. Eliza (future customer)

Level 2 would be a good middle ground as the rivers and streams that need to be improved would be improved, and the demand and supply options would be a good middle ground for the company and the environment. Dylan (future customer)

I live in an area of Cambridge where there is an abundance of nature reserves and for me protecting the water environment from this pollution is vital for the ecology of the planet. I feel very strongly that water pollution needs to be addressed by various bodies involved e.g. government, environment agency and water companies to protect all species from harm. Madeleine (SME – florist)

10 years feels too quick for proper planning and adjustment while 30 years is too long of a period of time to properly act in the benefit of the planet. As a result 20 years is a reasonable period to begin planning and maintaining focus on making impactful changes. Alice (future customer)

We should all take a role. The water company can assist by letting us know how we can best help. Mary (SME – hotel)

Costs and fairness

Costs and fairness

A series of two short activities, week 2 of the forum.

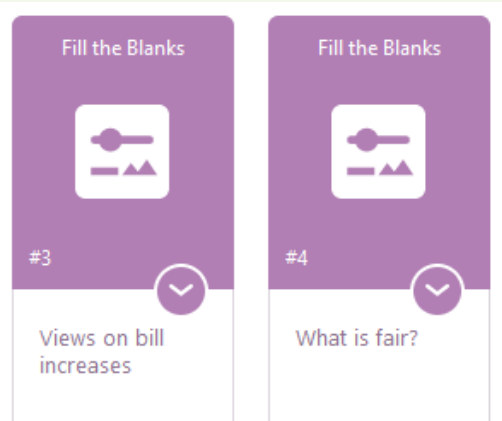
Context

- Across all key areas of ambition, SSC wants to understand whether consumers are happy to pay more for greater ambition or speed.
- WRW has standardised strategic questions on the acceptability of bill increases to pay for various investments.

Objectives

- Exploring consumer preferences and priorities in terms of ambition and how it relates to billpayer costs.
- Fairness in cost – how large scale investment is paid for, between generations and across water companies.

Process / approach



Video input explaining water bills and fairness dilemmas

Views on value for money, priority areas for investment and acceptable bill increase levels

Views on three elements of fairness:

- Government funding vs water bills
- Regional investment
- Intergenerational

Key takeouts

community research

Water bill mainly seen as good VFM in both areas & across all demographics

Least comfortable with bill increases to reduce frequency of restrictions

Most comfortable with bill increases for fitting more meters & educating customers

Generally acceptable to pay for future generations – but mixed views for other regions

Mean average acceptable bill increase approx. £20

South Staffs	Acceptable bill increases – per year
Min	£0
Max	£70
Mean	£20

Cambridge	Acceptable bill increases – per year
Min	£0
Max	£120
Mean	£22

Q. If you think an increase in bills would be acceptable for customers, how much of an increase you think would be acceptable?
Base: SSW 18; Cambs 20 (not asked of future customers)

Behind the headlines

Costs and fairness

community research

Surprises / learning:

Surprised to learn how much water companies do, and this makes bills more justifiable.

Some did not know before, that bill covers water (Cambs/South Staffs) and wastewater (Anglian /Severn Trent).

Learnt that water meters reduce consumption – this boosts support for investing in them.

Thoughts / justifications

Investment in demand-side measures preferable as less environmental impact and might make supply side measures unnecessary.

When considering investments that do not benefit them directly:

(1) Precedents are persuasive – e.g. recognising that we benefit from contributions paid for by previous generations for the benefit of all.

(2) Fairness matters – to some it seems unfair to pay for something they do not benefit from.

(3) Some happy to pay for the 'greater good' - but others only if they see personal benefits.

Caveats / limitations

Likely to be more willing to accept investment in supply-side measures if they feel that demand-side measures have been adequate.

When considering investments that do not benefit them directly:

(1) More comfortable paying to benefit future generations if the associated bill increase is small.

(2) More willing to contribute to investment in other regions if within the same company (more likely to reciprocate later).

(3) More comfortable if customers who benefit directly (future customers/customers in other regions) contribute more, to reflet their greater benefit to them (seems fairer).

Water bills overwhelmingly seen as good VFM for many reasons

community research

In comparison with my council tax bill the amount I pay for water seems quite insignificant. Paul (billpayer)

Good value for money

Dominant view in both areas and across all demographics. Many reasons for this view:

- Good quality water, good supply, few restrictions.
- Lower cost than other water companies.
- Low cost compared to other essentials (e.g., gas, electricity, food, council tax).
- Low cost per day & for amount used
- Low cost for such an important essential.
- Considering amount of work involved.

Bearing in mind the consequences of having no water I would have to say it represents excellent value for money. Stephen (billpayer)

Not good value for money

Rarely mentioned, mainly in Cambs

- Privatised, with proportion of bills going to shareholders.
- Poor quality, bad taste – so have to spend money on water filter.
- Not linked to amount used because of high standing charge.
- Lower bills than other companies is not necessarily a good thing – does it imply inadequate investment to ensure supplies and keep bills low in future?

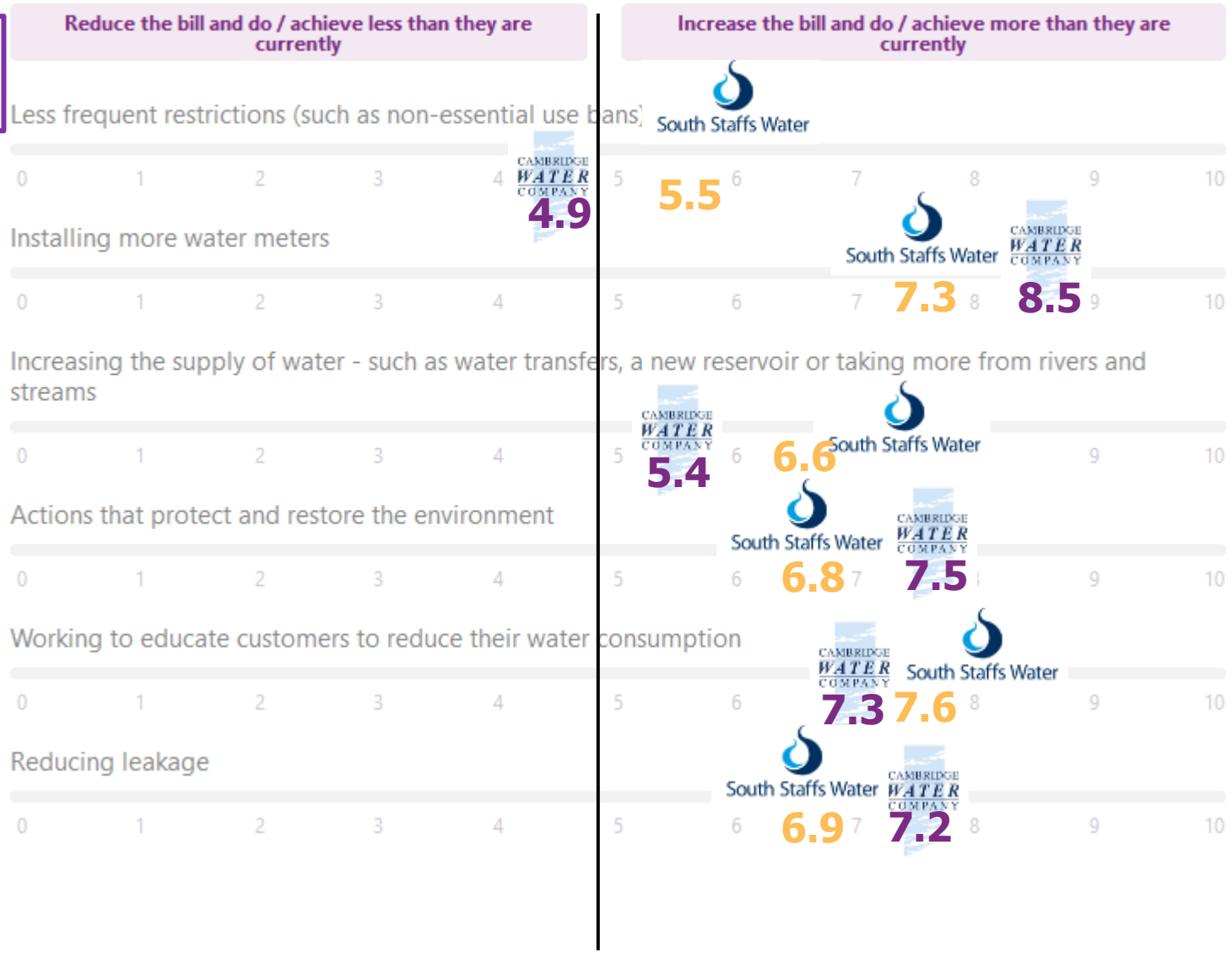
A few questioned video content (e.g., as their bills were higher) or said the question was difficult to answer (e.g., because they pay water and wastewater bills together).

Cambridge is 'seriously water stressed' so it does raise the question; if the bills had been more in line with the national average, the environment might not have got to the condition it's now in. Beverley (billpayer)

Acceptance of bill increases for more investment/achievement - preferences

community research

Mean scores out of 10



Line of neutrality

Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.

Participants more likely to accept bill increases for:

- Installing more water meters
- Working to educate customers
- Reducing leakage
- Actions to protect the environment (particularly Cambs)

Acceptance of bill increases for more investment/achievement

community research

Reasons for strong support

Installing meters

- Knock-on effect – will reduce consumption, reduce the need for restrictions, supply-side measures etc.
- Expected to reduce bills.
- Just believe it is the right thing to do.

Educating customers

- Seen as essential – mentioned here but also repeatedly throughout the process/in other contexts.
- Ripple effect – customers will educate others e.g., parents to children.
- Limitations: needs to be done well & will be ignored by some.

Reasons for less support

Increasing supply

- Concern about negative impact of taking more water from rivers.
- Seen as lower priority/not needed, if demand can be reduced.

Less frequent restrictions

- Assume other actions (e.g., fitting meters) would reduce restrictions so no need to invest directly.
- Some would actually prefer more restrictions as a guaranteed way to reduce consumption.

2 participants in Cambs and 3 in SSW would not accept a bill increase because of concerns about affordability for them or others. They were from a mix of backgrounds but 2 were on the PSR

Generally happy to pay for future generations – but more mixed views about other regions & large investments

community research

Generally happy to pay for future generations

Support - Widely held view: current customers should pay for investments that will benefit future generations. This work is urgent and cannot wait. Making sure the environment is fit for future generations is the responsible thing to do, not least because current customers have contributed to the problems. Young current customers might actually benefit themselves in future.

Opposition - Minority view: the cost should be borne by future customers as it is not fair for current customers to pay for something they will not benefit from.

We have to take responsibility for the environment surrounding us and pay for whatever is necessary to protect it. We have to leave it in a better state than we encountered it, not leave huge bills for our children to pay. We also have to stop being selfish and only focus on keeping our current bills low. Anna (billpayer)

Paying for other regions more controversial

Support - A few supported paying for investments in other regions for 'the greater good' (e.g. because water is a common resource, and people should look out for each other). More supported it if there would be some future benefit for them e.g. water from a new reservoir shared or investment help offered.

Opposition - Would not want to pay if they do not directly benefit and would not trust that they will get future benefit.

I think if the favour is returned at a later date – which It would be as there would be a time in the future our region would need money to invest – then I think it's fair. Eden (future customer)

Also mixed views on how to pay for large investments

Support paying through tax – More appropriate for national schemes, cost spread fairly. Gives govt more control over how funding spent. Only paid by those who can afford it.

Support paying through bills – Make more sense for local projects (e.g. for areas more prone to drought). Fit local needs/preferences. Could give customers sense of ownership/connection.

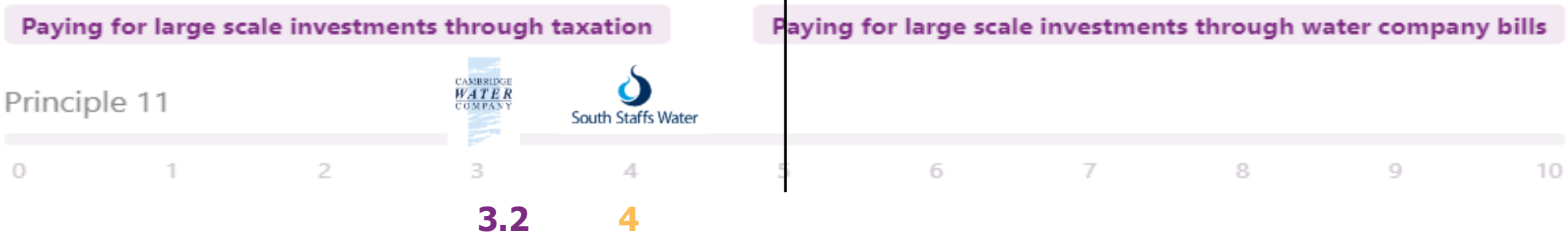
I I think that huge major investment should be paid through taxation as it will affect people and future generations nationwide, a little bit like the NHS. Jody (billpayer)

Payment principle – payment through taxation vs. payment through water bills

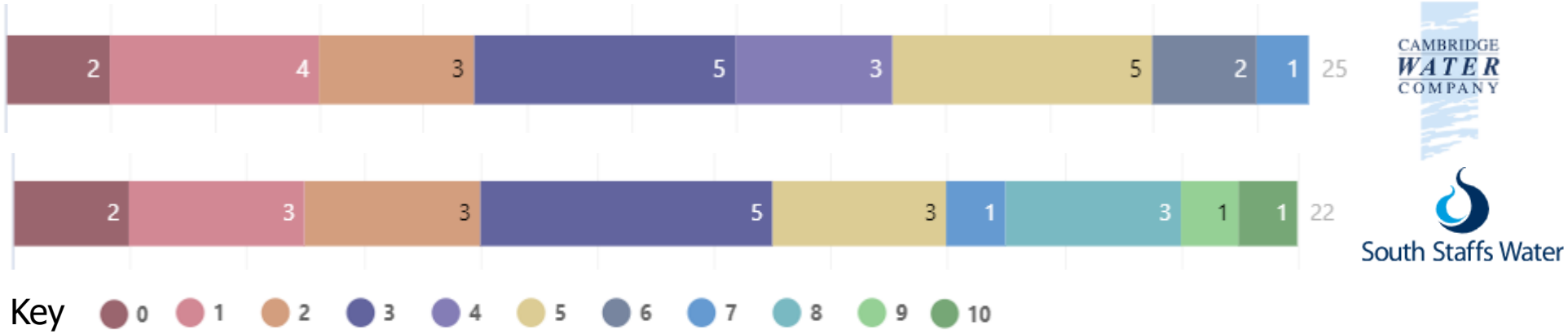
community research

Mean scores out of 10

Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.



Distribution of scores in each area:



Only 3 people in Cambs indicated more than 5.

6 people in South Staffs did so and a few were firmly at the opposite end of the scale.

Differences between key groups

community research

Regional differences

South Staffs Water

CAMBRIDGE WATER COMPANY

- VFM of water bills generally seen as good in both areas but more argued it was not good in Cambs e.g. not fair to pay shareholders, not right that charges aren't linked to use.
- More mentions of affordability in South Staffs when discussing investments.

2% of every single household bill goes to the shareholders… Is it right for individuals to make money on the back of essential services and for those essential services to become more expensive to use? Water is an essential amenity, it should not benefit a few but all. Carole (billpayer)

SMEs vs Households

- Some of the strongest support for investing to reduce restrictions came from SMEs because business could be affected.

Restrictions are good it just depends on how it affects business' – our business wouldn't function without water and we couldn't have a ban even temporarily. Emma (SME – farmer)

Future vs current bill payers

- Future customers no different from other customers in their views about intergenerational fairness.
- Future customers, like current customers, were mindful of and concerned about the potential bill impact from investment.

I think we should always be in support of making the future better, helping protect the environment long term for our children and their children. I think the majority of people who have children would agree with this. Shareen (billpayer)

Demographics

- Few differences with demographics e.g. views about VFM did not differ.
- Parents and non-parents were willing to pay for future generations – but almost all who were **not** willing were **not** parents.

In their words

South Staffs Water

CAMBRIDGE WATER COMPANY

community research

I think it is good value. We take it for granted that each day we have clean safe drinking water. I have also been lucky to have never have been without water so to me what south staffs are doing is good value. Linda (billpayer)

We would never do anything to protect the environment if we thought that it wasn't our job because the changes will only benefit future generations. It is everyone's responsibility to act now, even if that means we pay more for something that will benefit future generations not us! Selina (billpayer)

I think the current price is very good value for money - especially given where it sits on the national scale. I think 45ish pence per day is more than fair in comparison to other essentials - electricity/ gas/ food/ fuel. Sam (billpayer)

If it was guaranteed that the favour be returned then yes. i.e you promise both areas investment at differing times. Otherwise, I feel it's unfair for one area of bill payers to subsidise the benefits of another area just because they are owned by the same company. Marie (billpayer)

For me, the priority should be given to the protection of the environment and the more forceful methods of cutting down on the water consumption (metering, temporary bans, staggered costs, reducing leakage). Under no circumstances should we increase the water consumption - that's why I don't want any investment in that area [supply side measures]. Anna (billpayer)

For me it would be about affordability, so I could not say they should do all of the above and bills could go up drastically. Asma (billpayer)

I think in the near future, as I'm quite young i would rather not see a bill increase at all (money is tight as a student!). But if i were to see an increase i would be more accepting if it was actions that protect and restore the environment or installing more water meters to help reduce people's consumption of water. Protecting the environment is very important to me and would make me feel less guilty about the water I use. Abbie (future customer)

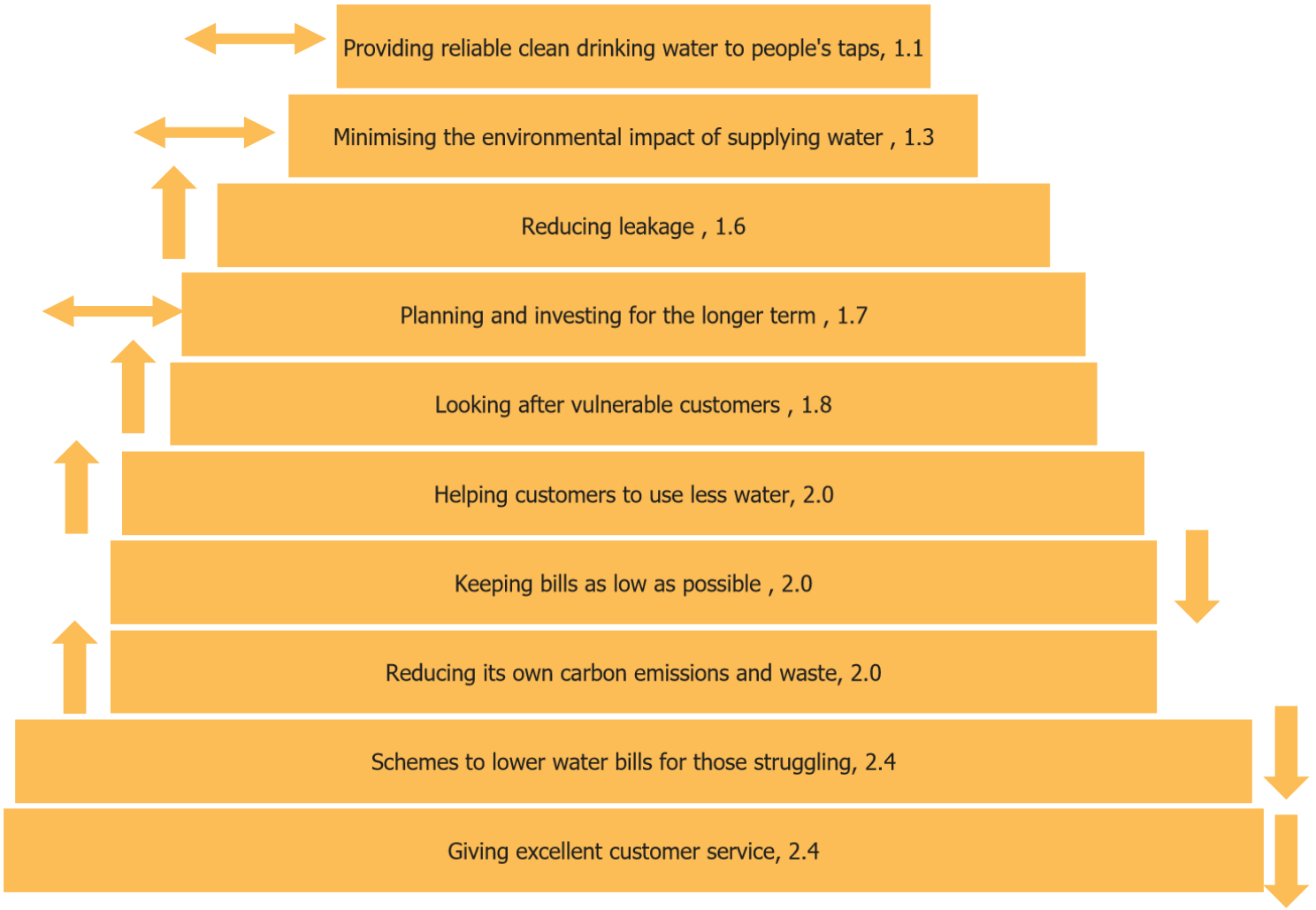
Changing views – at an aggregate and individual level

Prioritisation before and after

Mean where 1= high priority, 2 = medium priority and 3 = lowest priority

Q. Here are some things that could be a priority for your water company. Please sort all of them into categories to show whether you think they are high, medium or low priority

South Staffs Water

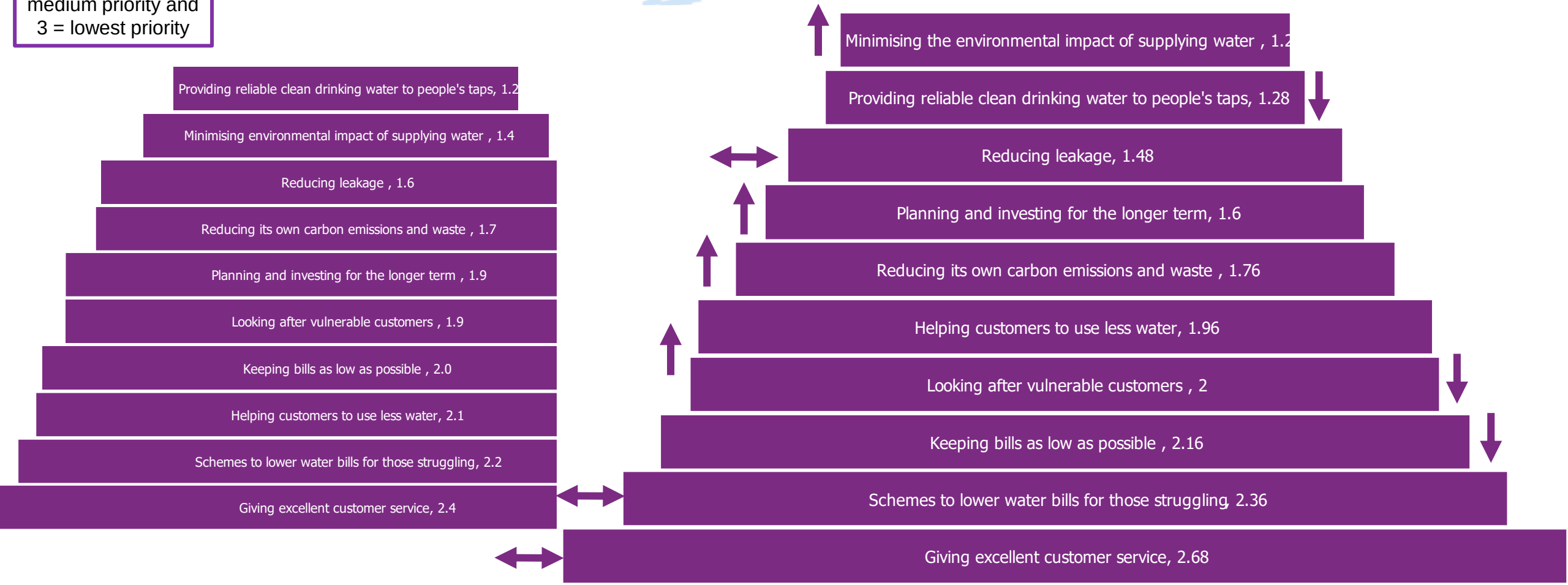


The order of priorities changed in South Staffs with leakage, looking after vulnerable customers, helping customer use less water and reducing carbon emissions all higher in the prioritisation. Keeping bills low, schemes for those struggling and customer service were all given lower priority.

Prioritisation before and after

Mean where 1= high priority, 2 = medium priority and 3 = lowest priority

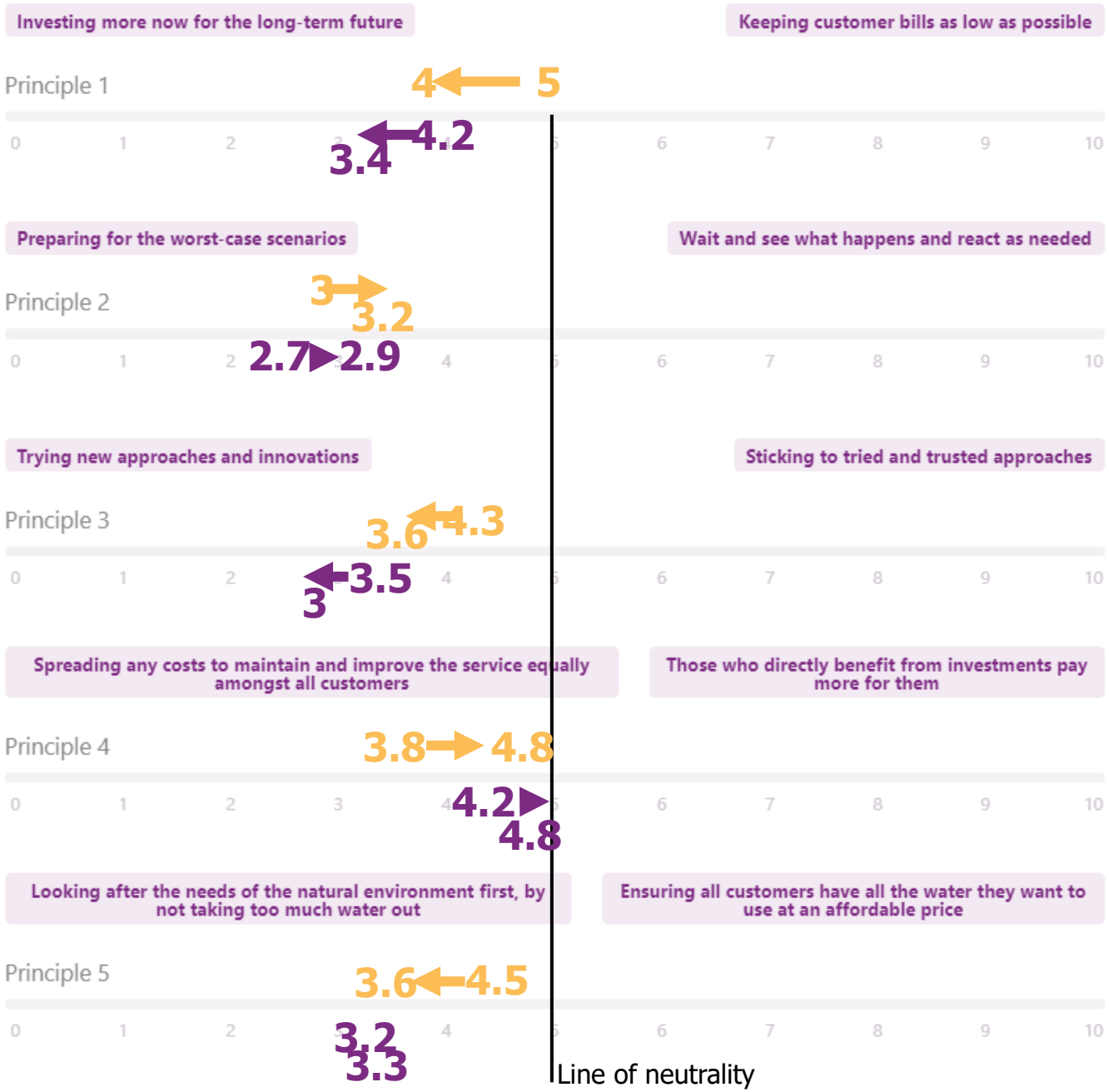
Q. Here are some things that could be a priority for your water company. Please sort all of them into categories to show whether you think they are high, medium or low priority



Changes were also seen in Cambridge. Minimising the environmental impact of supplying water, long term planning, reducing carbon emissions and helping customers to use less water were all higher in the prioritisation. Keeping bills low, looking after vulnerable customers and even providing a reliable water supply were given a lower priority overall.

Key principles for the plan (1-5) changes by the end

Mean scores out of 10



South Staffs Water

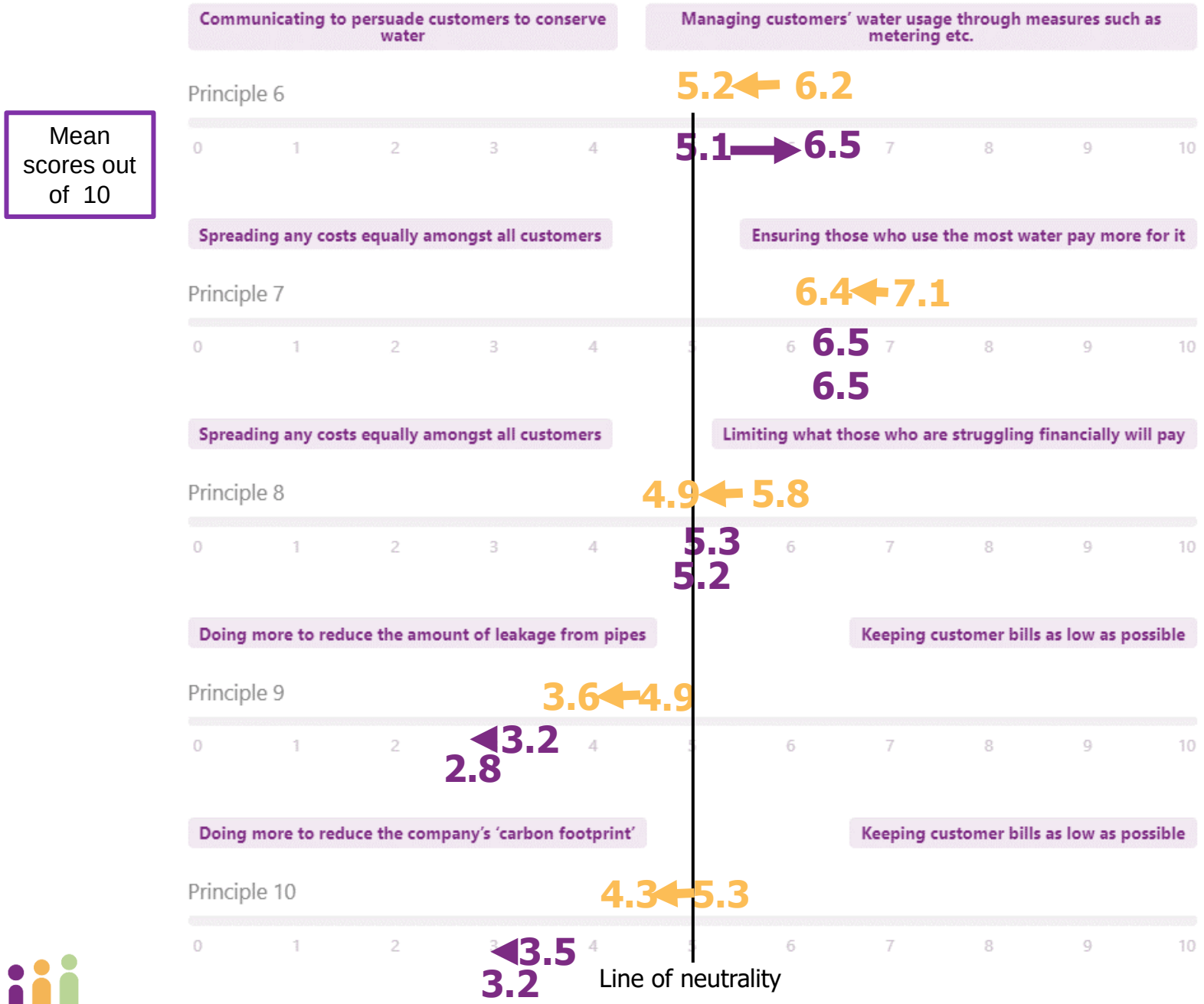
CAMBRIDGE WATER COMPANY

Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.

Views on the principles had changed in both areas, but not markedly. There was a small shift towards:

- Long term planning over keeping bills low (both areas)
- Looking after the natural environment over human needs (in SSW)
- Those who directly benefit from investments paying more (in SSW)

Key principles for the plan (6-10) changes by the end



South Staffs Water

CAMBRIDGE WATER COMPANY

Move the slider towards the principle you favour more, or a 5 means you are sitting on the fence.

Views shifted in opposing directions with regard to education vs. management to reduce consumption; with those in Cambridge moving towards stronger management measures.

South Staffs customers moved in favour of spreading costs equally amongst all customers.

How individual views changed

- There were shifts in responses to both the priorities and the principles in both areas at an aggregate level.
- Some of the individual shifts were considerable, with priorities amongst all kinds of WRAP members (future customers, current customers and SME's) clearly apparent (some examples follow).
- Furthermore, most participants recognised their own changes in attitude. Most commonly this was expressed in terms of heightened concern for future environmental issues; along with a better understanding of what water bills pay for and why they may need to increase for the benefit of everyone.

Did your views change? Why?

South Staffs Water

The fact that water companies are planning so far into the future shows how serious this problem is. Some very difficult decisions to be made for everyone's sake. I really do not want wildlife to suffer. I live near areas of natural beauty which I appreciate more since I moved here. Ivan (billpayer)

I never thought about the impact taking water has on the environment and so I'd never have given it a second thought and always voted for lowest bills possible, but I now see the benefit paying a little more will have on our community and future. Shareeen (billpayer)

I'm thinking more about the overall picture instead of just the cost to the customers. I'm thinking more about the natural environment as well. Hanna (billpayer)

My views have changed a little because you want to help those who are struggling but the earth is at risk as well so maintaining the views was a bit tricky. The information which changed what I thought was the statements which mentioned people with a low income that made me put them as a high priority because they need basic nutrition such as water. Helal (billpayer)

My views in terms protecting the environment when we use water have only become firmer as a result of the forum. Sam (billpayer)

Definitely. I think that we should get more education around this topic and broaden the knowledge around the wider community, I really enjoyed learning about this and enjoyed taking part, but also seeing what everyone else thinks around the same topics and conversation. Joel (billpayer)

CAMBRIDGE WATER COMPANY

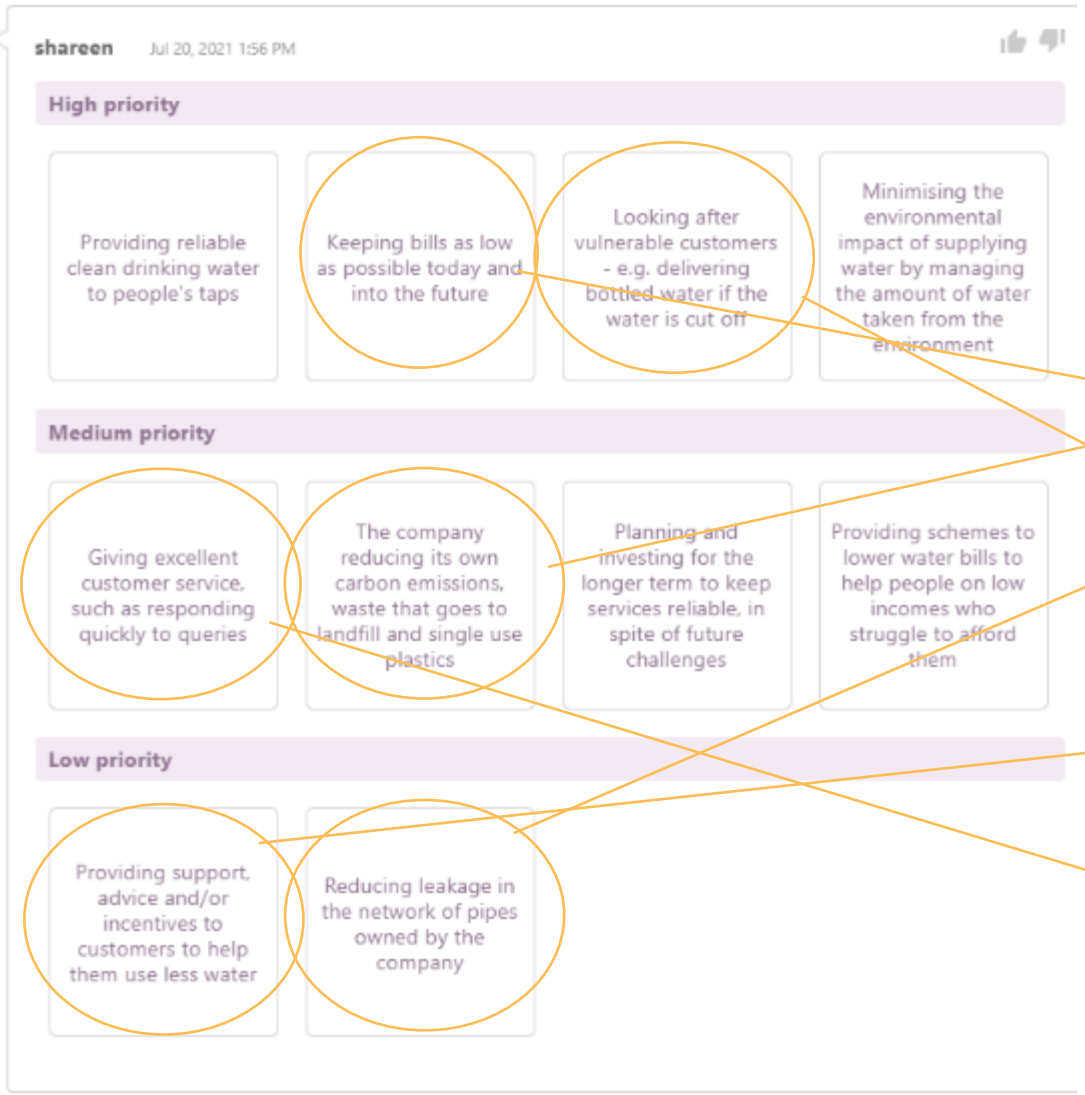
My views are now more weighted towards action on reducing water consumption and minimising environmental impact, and away from individual needs – though these are still important they need to be secondary to environmental considerations. Beverley (billpayer)

The environment has always been a concern for me but I didn't know very much at all about our water supply, how we got it and everything involved with future proofing. Three weeks ago I would have moaned about an increase in my water bill because I wouldn't understand why. Now that is not the case. I had no concept of how much water is lost through leakages or how much water is used on average in litres per person per day. I do now. I have been much more conscious of this over the last 2 weeks. The education of customers is very important. Stopping leakages didn't seem that important to me when I didn't understand how much water was being lost. Now I do think it is important to work at fixing as many as possible. Selina (billpayer)

community research

Priorities journey – South Staffs Bill Payer

Before



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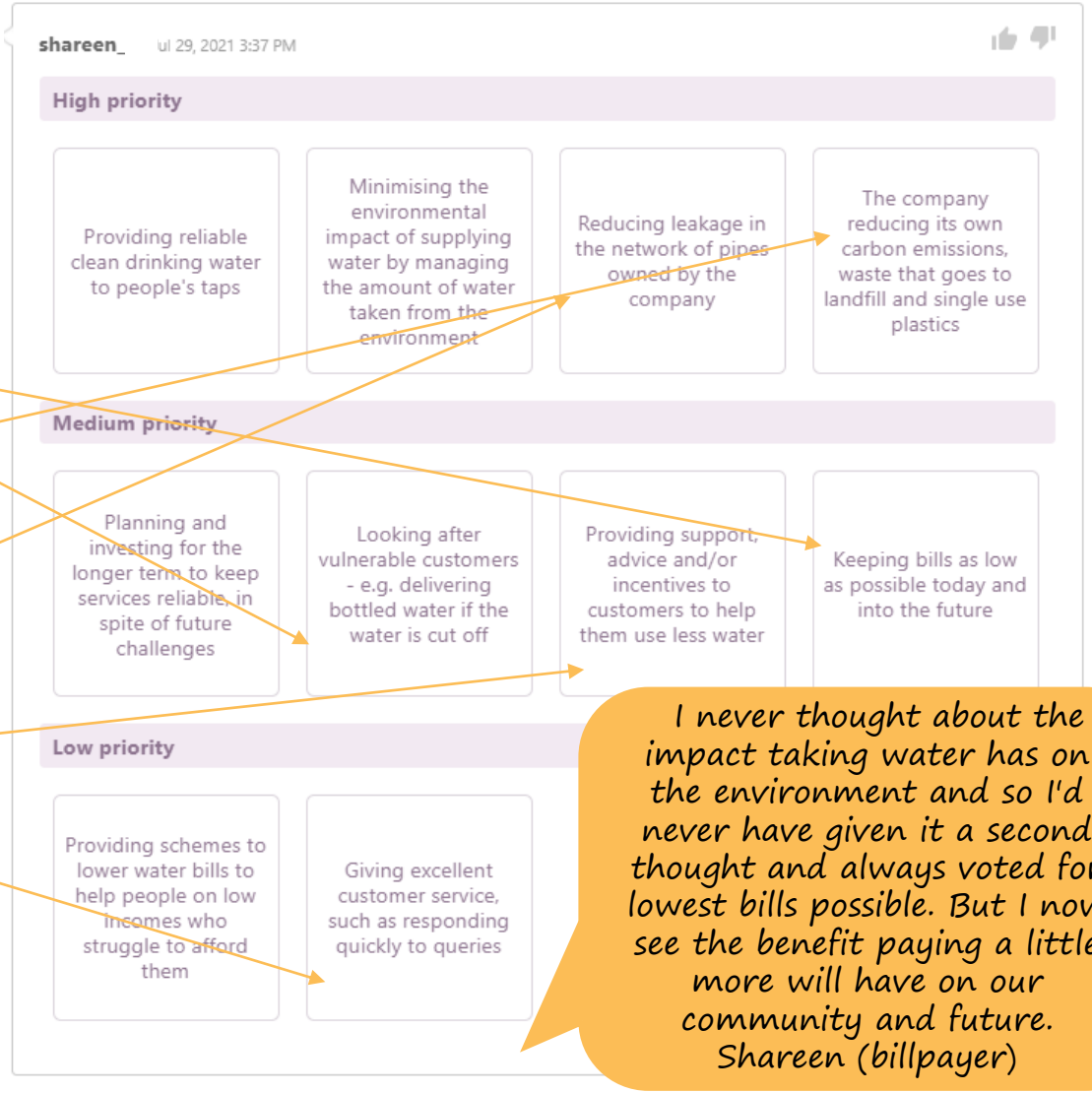
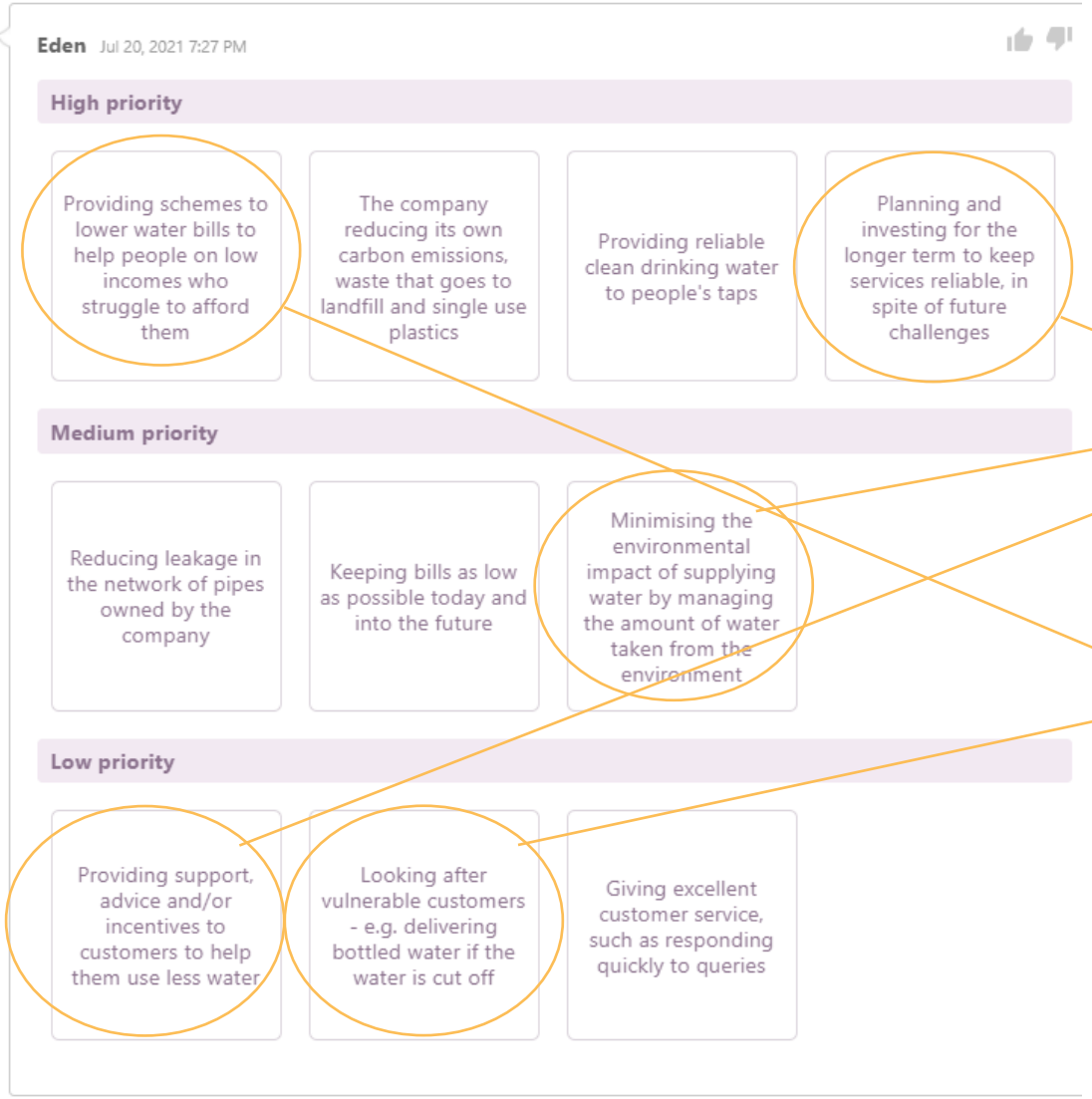


I never thought about the impact taking water has on the environment and so I'd never have given it a second thought and always voted for lowest bills possible. But I now see the benefit paying a little more will have on our community and future. Shareen (billpayer)

Priorities journey – South Staffs Future Customer

Before



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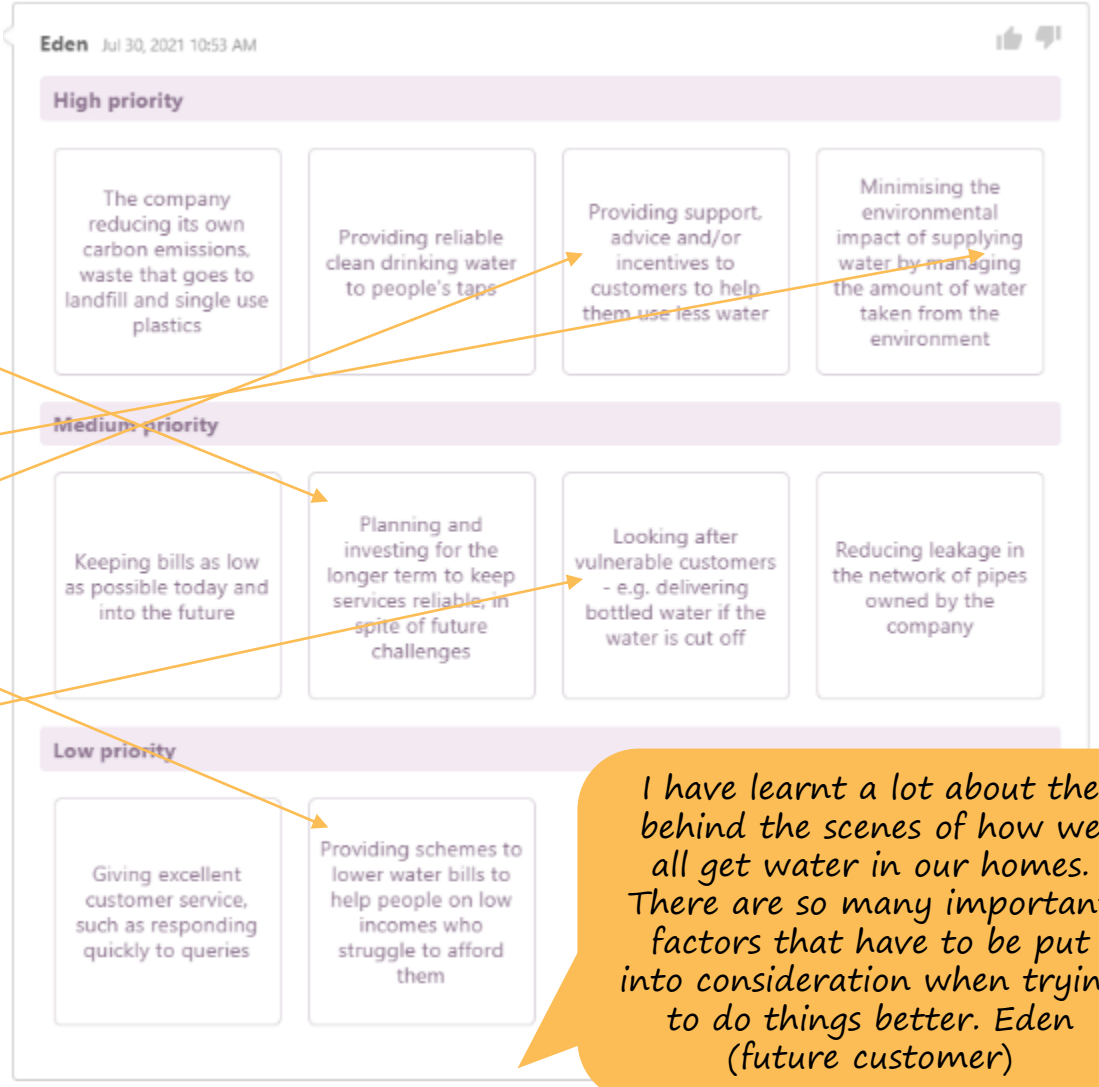
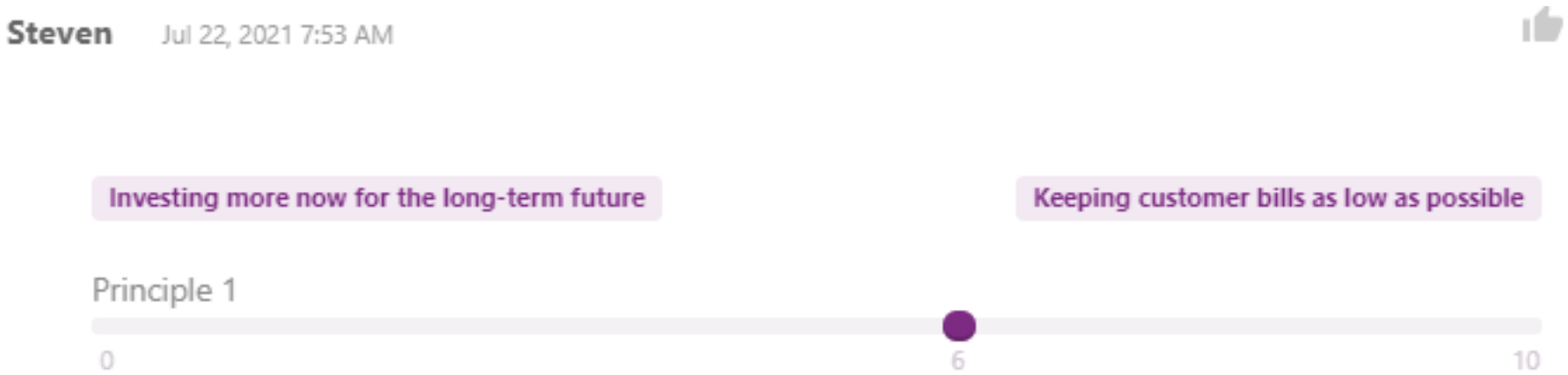


I have learnt a lot about the behind the scenes of how we all get water in our homes. There are so many important factors that have to be put into consideration when trying to do things better. Eden (future customer)

Principles – Cambridge Bill Payer

Before



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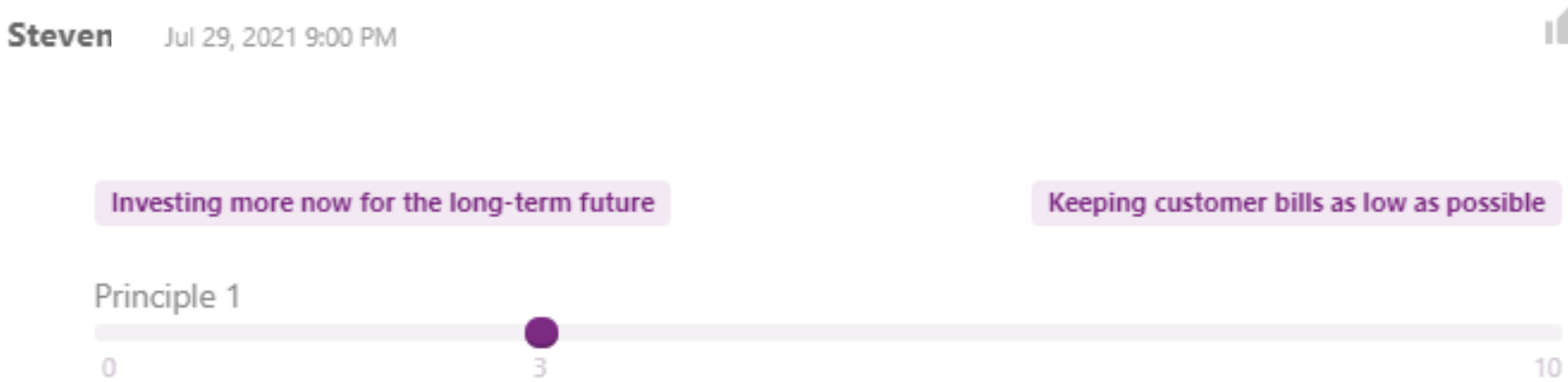
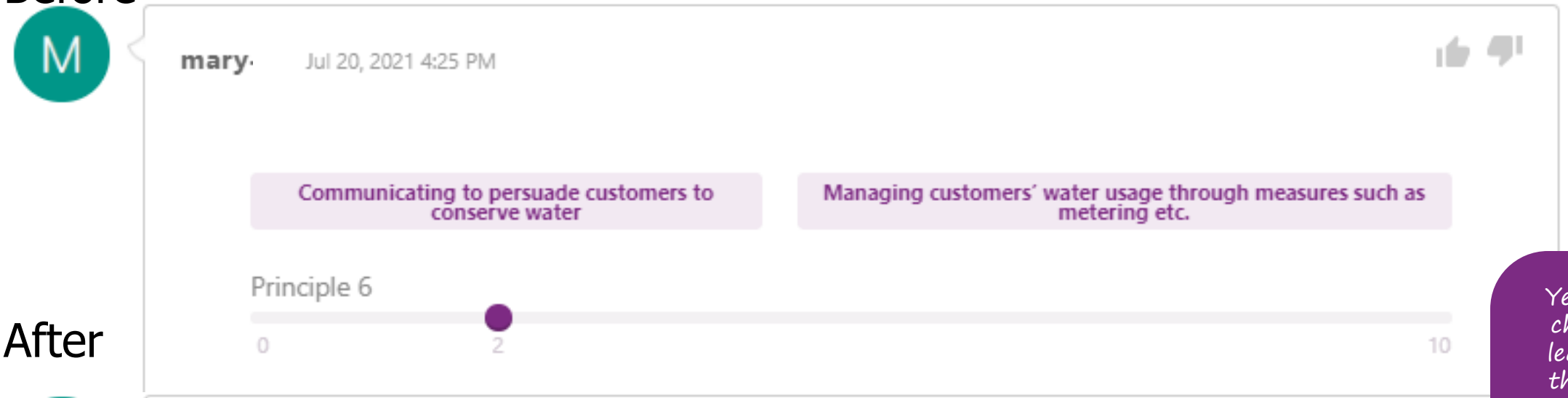


I am no longer taking the clear liquid for granted. I sort of always knew there was a lot of work going into providing my water without quite realising how much. Steven (bill payer)

Principles – Cambridge SME

Before



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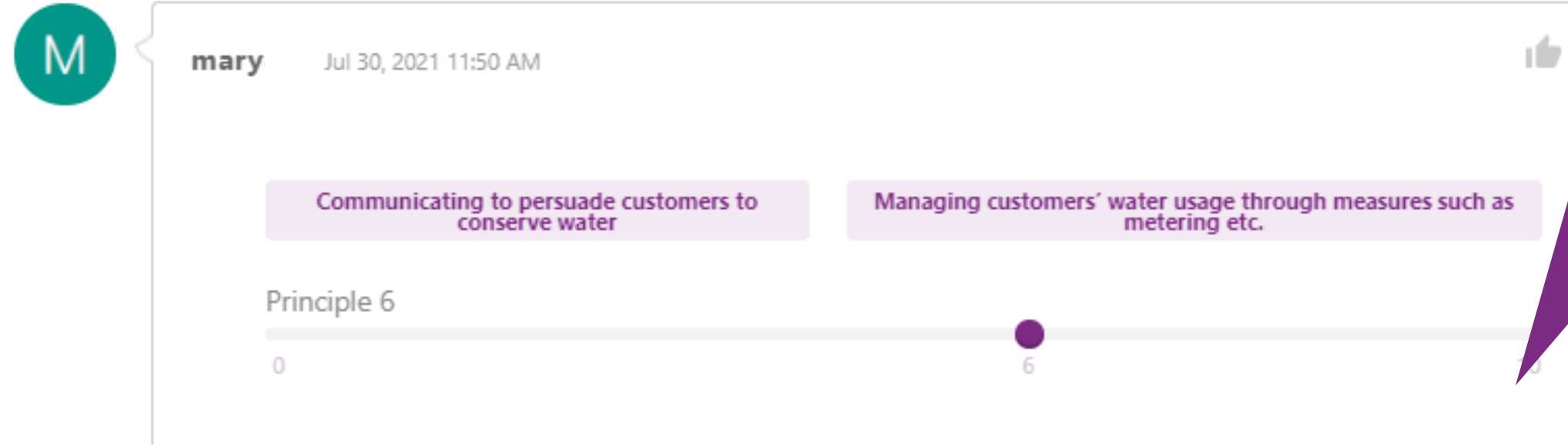

Yes {my views} have changed as I have learnt more about the subject. I have given it more thought than I would if I had not had to answer some difficult questions. All the information given made me realise how important these decisions are for the future and how we can all best conserve water. Mary (SME)

Final messages from participants

Clear call for more consumer education and information

My message to South Staffs Water would be to communicate to their customers the urgency with which things need to start changing, educating them as I feel I have been educated via this forum and encourage them to start thinking long term about how behaviour needs to change and the likelihood that bills are going to start increasing in the near future. Paul (billpayer)

Difficult to add just one message to the team at South Staffs as this has been such a thought provoking week and certainly given me food for thought. I would urge them to ensure not all additional costs are passed onto the customer in fact in the current climate there should be a price freeze. They have to find another way of paying for the continual improvements and look into new and innovative ideas. Stephen (billpayer)

There was a consistent call for greater engagement with customers across both regions.

Whilst some participants in SSW mentioned the environment and specific demand management measures (particularly metering), these were stronger themes in feedback from Camb participants.

SSW participants were more likely to mention the need for balance, innovation and planning.

I have thoroughly enjoyed learning about the process the water goes through in order to reach my taps! Going forward I would just hope that everything we have shared as a forum is taken into consideration and I hope it helps shape the future of Cambridge water as a whole., that the environment and wildlife continue to flourish whilst maintaining a fair and reasonably priced service. Sarah (billpayer)

My message to Cambridge Water is please include in your management plan the development of strategies that will help slow down climate change, continue to tackle water leakage with a view to considerably increasing the targets for repairs and put resources into the education of customers so that future generations can continue to enjoy our beautiful planet for many more generations. Madeleine (SME – florist)

Additional information (sample, evaluation, stimulus material)

WRAP participant profile

WRAP participants	SSW	CAMBS
Total	22	25
SME owners *(mix sectors and size)*	5	5
Future bill payers – *(mix of current work / study and home circumstances)*	4	5
Bill-payers (jointly or solely responsible for bill), of which:	13	15
Gender		
Male	12	10
Female	10	15
Age		
18 to 24	4	5
25 to 39	5	8
40 to 54	10	4
55 to 70	2	7
70+	1	1
Children at home		
Children in household	5	6
Ethnicity		
BAME Background	4	4

WRAP participants	SSW	CAMBS
Socio Economic Group		
ABC1	13	18
C2DE	9	7
Working status		
Employed (full or part time)	18	19
Water Meter in Home		
Yes	14	17
Home location		
Rural	4	16
Vulnerable circumstances		
Vulnerability (financial/health)	5	5
SSC Segment (not asked to SMEs or PSR)		
A: Very time pressed juggling all their commitments. Consequently don't think much about their water usage and don't want their time wasted. Often online.	3	7
B: Highly engaged with their water usage and the wider community their live in. Expect a very high level of service from companies they use. Use technology, but prefer a personal relationship.	2	3
C: Often financially and time pressured. Strong preference for being on-line and using social media.	3	3
D: Highly engaged with using the 'latest' technology and managing their lives online. Switched on to saving water.	2	4
E: Highly engaged with technology and very focused on their network of family and friends. Admit to not thinking much about their water usage or services and prefer a more transactional relationship with their water company.	3	1

Evaluation survey

South Staffs Water

	Very good	Quite good
Logging in for the first time	18	4
Finding your way around the site	11	11
Understanding the tasks and questions	9	11
Being able to have your say	17	5
Reading and commenting on other people's comments	10	10

	Too much	About right	Too little/few	N/A
The amount of time you had to spend on the research	3	19	-	-
The amount of emails from Community Research	-	21	1	-
The amount of support you received if you had problems	-	11	1	10

CAMBRIDGE WATER COMPANY

	Very good	Quite good
Logging in for the first time	23	2
Finding your way around the site	18	7
Understanding the tasks and questions	20	5
Being able to have your say	20	5
Reading and commenting on other people's comments	8	14

	Too much	About right	Too little/few	N/A
The amount of time you had to spend on the research	3	22	-	-
The amount of emails from Community Research	-	24	1	-
The amount of support you received if you had problems	-	10	-	15

community research

Stimulus material – animated videos

Topic	Stimulus	Slide number
General context	SSW WRMP video - https://vimeo.com/570335823/99f6bd6a76 CAMBS WRMP video - https://vimeo.com/576711137/825d47ffe4	
Resilience	SSW drought video - https://vimeo.com/577244192/ec6c58dcad CAMBS drought video - https://vimeo.com/577505308/fc6a41670b	28-33
Demand	SSW leakage video - https://vimeo.com/577576968/3f92621f13 CAMBS leakage video - https://vimeo.com/577574702/63a7c30102 SSW consumption video - https://vimeo.com/577573703/09a1174b45 CAMBs consumption video - https://vimeo.com/577573393/3c5e42bce8 Additional information on consumption - http://nicola.qeng-ho.org/water/	38-41 42-47
Supply	SSW supply options video- https://vimeo.com/577641064/910dea7099 CAMBS supply options video - https://vimeo.com/577645265/357fd2e89e	49-51
Environment	SSW environmental options video - https://vimeo.com/578539175/9c9d244c6d CAMBS environmental options video - https://vimeo.com/579467600	60-64
Costs and fairness	SSW payment options video - https://vimeo.com/579357205/93479b2e32 CAMBS payment options video - https://vimeo.com/580193186/631e92eb68 SSW fairness video - https://vimeo.com/579365194/769ac7fb3f CAMBS fairness video - https://vimeo.com/579365194/769ac7fb3f	70-75 76

Stimulus material – questionnaires, handouts and infographics

Topic	Stimulus	Where referenced in report (Slide no.)
Initial attitudes/ awareness	Individual quiz (attitudes) (found in Appendices to the report, page 3) Individual quiz (information provision) (found in Appendices to the report, page 8)	17-20
Principles and priorities	Principle statements (found in Appendices to the report, page 14) Prioritisation statements (found in Appendices to the report, page 16)	22-25
Resilience	Service levels infographic (found in Appendices to the report, page 17) Environment Agency target infographic (found in Appendices to the report, page 19)	29 34
Demand	Options for reducing demand infographic (found in Appendices to the report, page 20	43
Supply	Top Trumps exercise – Cambridge Water (found in Appendices to the report, page 21) Top Trumps exercise – South Staffs Water (found in Appendices to the report, page 30)	50-55
Environment	Environment options summary infographic (found in Appendices to the report, page 40)	61

Note that the forum agenda is not available in a format compatible with a pdf file

Click here to be taken to full Appendices containing stimulus documents