

PRIORITIES HOUSEHOLD TRACKER **YEAR 3 QUANTITATIVE INSIGHTS**

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SPECIFIC OBJECTIVES

QUANTITATIVE priorities explored through a Maxdiff study conducted online with a representative sample of SSW and CAM customers



Provide a benchmark against which customers' priorities will be tracked for both wholesale and retail services



Explore any differences between uninformed/informed priorities and qualitative/quantitative insights



Understand the customer impact of the cost-of-living crisis



This chart pack illustrates the year 3 quantitative insights

THE BRIEF

SSC has put together a programme of research to track customer priorities on a consistent and regular basis throughout AMP7, 2020-2025. We are now at the end of the third year of the tracker.

WORK UNDERTAKEN throughout the first year AMP7 – 2020/21

YEAR 1 PRIORITIES TRACKER

- Desk research = Spring/summer 2020
- Qualitative research = September/October 2020 - household and business customers
- Quantitative household research = November 2020 to March 2021
 - Design November 2020
 - Fieldwork phase 1 = December 2020
 - Fieldwork phase 2 = January 2021
 - Fieldwork phase 3 = February 2021
 - Analysis = March 2021

WORK UNDERTAKEN throughout the second year AMP7 – 2021/22

YEAR 2 PRIORITIES TRACKER

- Quantitative household research
 - Fieldwork phase 1 = May 2021
 - Fieldwork phase 2 = September 2021
 - Fieldwork phase 3 = December 2021
 - Fieldwork phase 4 = March 2022
 - Analysis = April 2022

WORK UNDERTAKEN throughout the third year AMP7 – 2022/23

YEAR 3 PRIORITIES TRACKER

- Qualitative research = April 2022
- Quantitative household research - household and business customers
 - Fieldwork phase 1 = June 2022
 - Fieldwork phase 2 = September 2022
 - Fieldwork phase 3 = November 2022
 - Fieldwork phase 4 = March 2023
 - Analysis = April 2023

YEAR 1 TARGET 350 SSW/150 CAM YEAR 1: ACHIEVED 364 SSW/147 CAM - 511 ONLINE SURVEYS
YEAR 2 TARGET 700 SSW/300 CAM YEAR 2: ACHIEVED 701 SSW/353 CAM - 1,054 ONLINE SURVEYS
YEAR 3 TARGET 700 SSW/300 CAM YEAR 3: ACHIEVED 745 SSW/327 CAM - 1,072 ONLINE SURVEYS

Quotas set to ensure sample is representative of household customer base in each of the two supply areas – South Staffs Water and Cambridge Water. Final data set **weighted** according to targets.

 **Meter Status**

 **Gender**

 **Age**

 **Social Grade**

SSW	Target	Status		
		Year 1	Year 2	Year 3
Metered	45%	50%	45%	38%
Unmetered	55%	46%	51%	54%
Don't know	-	4%	4%	8%
CAM				
Metered	75%	75%	68%	71%
Unmetered	25%	19%	25%	21%
Don't know	-	6%	6%	7%

SSW	Target	Status		
		Year 1	Year 2	Year 3
Female	51%	46%	46%	51%
Male	49%	54%	54%	48%
Prefer not to say	-	-	0%	1%
CAM				
Female	50%	41%	47%	50%
Male	50%	59%	51%	48%
Prefer not to say	-	-	2%	2%

SSW	Target	Status		
		Year 1	Year 2	Year 3
18-34	19%	14%	16%	24%
35-49	30%	14%	18%	26%
50-64	25%	45%	9%	25%
65+	26%	27%	51%	24%
CAM				
16-34	18%	17%	15%	18%
35-49	31%	21%	20%	29%
50-64	27%	10%	10%	31%
65+	25%	52%	46%	21%

SSW	Target	Status		
		Year 1	Year 2	Year 3
AB	17%	31%	28%	17%
C1C2	51%	45%	42%	51%
DE	32%	24%	26%	29%
CAM				
AB	35%	52%	49%	36%
C1C2	48%	41%	31%	44%
DE	17%	7%	14%	15%

* Minimum quota missed

Not include prefer not to say

Not include prefer not to say

Quality checks

- Minimum completion time imposed
- Minimum time to review SSW/CAM information and attribute descriptions
- Straightliners removed
- Logic checks

Year 3 Follow ups

- 16% opted in to H2Online signup
- 60% requested a summary of results

Year 3 Source

- Dynata: 562 (52%)
- SSW: 346 (32%)
- CAM: 98 (9%)
- Youthsight – future customers (aged 18-25): 67 (6%)

Weighting

- Weighting applied to ensure consistency of samples between Years 1, 2 and 3

Questionnaires

- Questionnaires and stimulus materials were added to [Appendix](#)

* Quotas all based on the 2011 Census data, but any future years' work will switch to the 2021 Census data.

This quantitative element of the tracker only covers Household customers (Current bill payers and future customers) because:

- A range of Non-household customers have been covered in the qualitative stage of the research to understand their views in-depth.
- A main driver of the decision not to include Non-household customers is during the qualitative stage, we did not observe any significant differences between Household and non-household customers.
- Additionally, it is becoming increasingly challenging to achieve a robust number of interviews online among a NHH audience. Therefore, undertaking large-scale quantitative surveys among Non-household is not cost effective, given the constraint budget of the project.



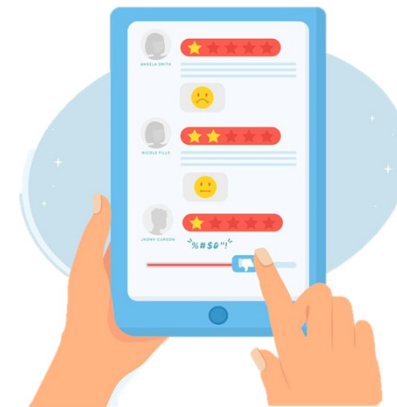
The study employed online methodology due to the following reasons:

- Participant preference – many prefer to answer surveys online rather than via telephone or face-to-face as they can pick a time that suits them best, and the time needed to complete the survey is shorter.
- Anonymity – participants in online surveys often provide longer and more detailed answers because they feel safe in the anonymous environment of the Internet, thus making them more likely to give a more honest and open response.
- Easy use of images including animations. Moreover, the quantitative survey employed a MaxDiff approach, which is not suitable to be conducted via telephone. Online is the most effective method to collect the responses.
- Undertaking sufficient volume of face-to-face surveys to provide sufficient sample in each wave to analyse this population separately to look for differences, so is not good value within budget constraints
- Online methodology shows that a wide range of vulnerabilities are being picked up – both PSR and financial types – who may not have attended face-to-face deliberative group sessions
- There is no evidence from past SSC studies or other studies that the views of customers who don't/won't complete online surveys are significantly different to those that do.
- Online survey shorten fieldwork periods

Limitations of online engagement

While this study captured the views from participants across all regions of SSC's client base, with a diverse layout of demographic sampling, the online methodology still holds some potential drawbacks:

- Without an actual interviewer, we can not guarantee that all participants fully understood what was being asked and each question was answered correctly. Being completely online also increases response bias when participants were disengaged and selected random option to complete the survey quickly. To minimise response bias, Accent have a thorough data-check process, removing any interviews that are completed under the minimum completion time and also removing any straight-lined interviews.
- Inability to reach participants who are digitally-excluded participants. In terms of this, SSC will review the fieldwork methodology from 2024 to assess what improvements could be made to reach customers who can't/won't get online.



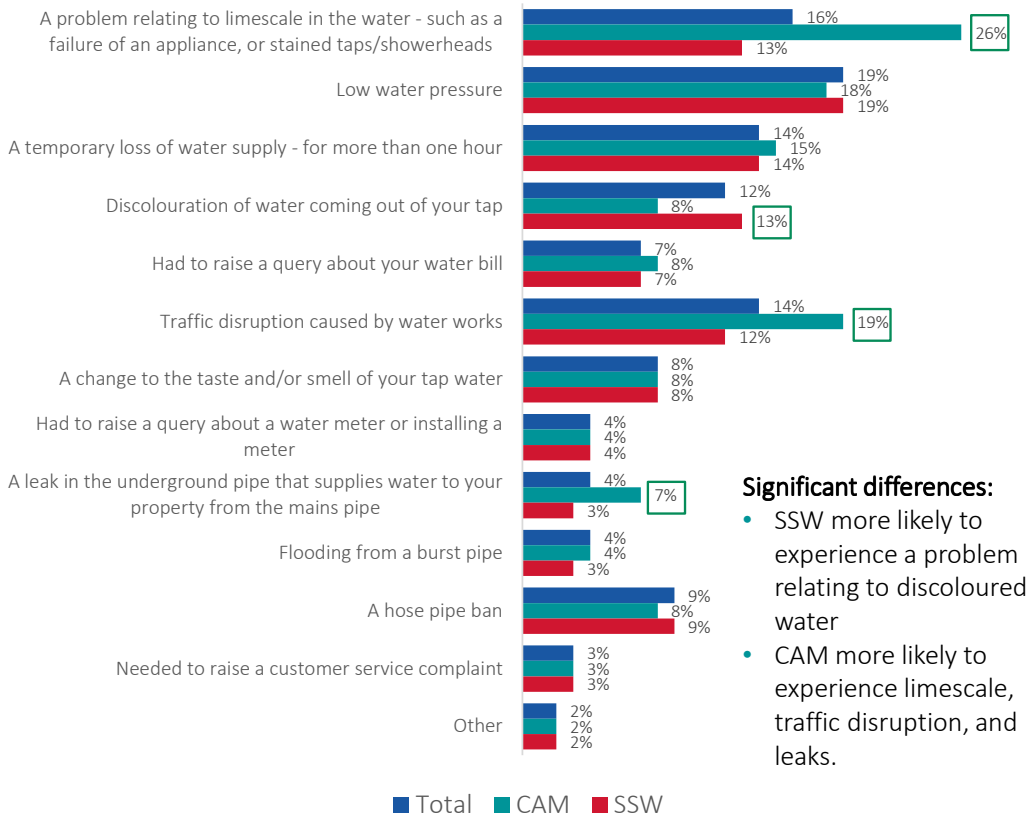
SAMPLE CHARACTERISTICS

SERVICE ISSUE EXPERIENCE/VULNERABILITY

All participants completed the survey online – a mix of SSC supplied customer sample and from Dynata & YouthSight’s commercial panels

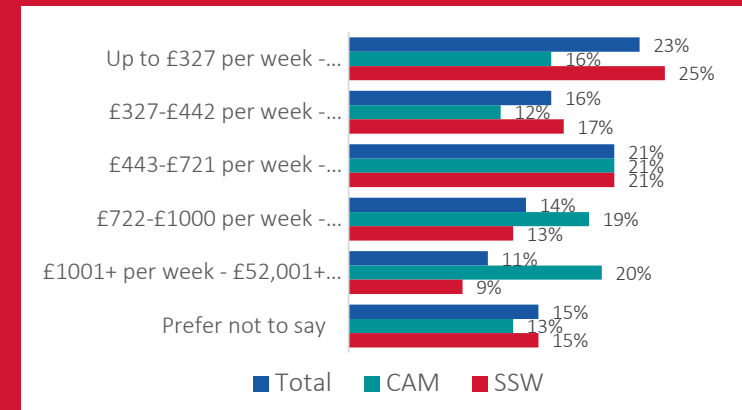
SERVICE ISSUE EXPERIENCE

56% had some form of service experience over the last 2 to 3 years

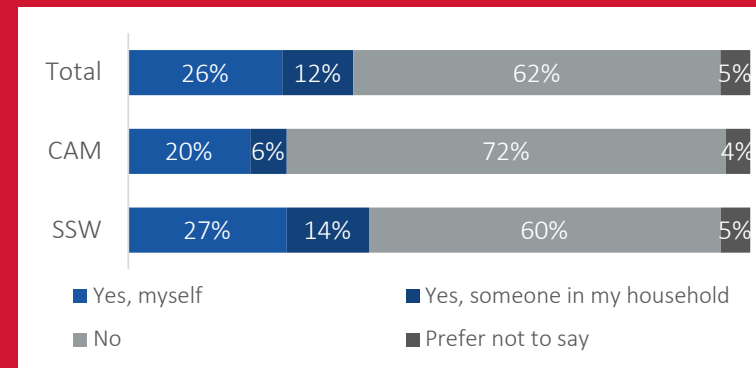


VULNERABILITY: 43% OF TOTAL SAMPLE

- 23% live in a household with an annual income under £17,005 pa
- And 14% of the sample live in a household where someone is on the SSC Priority Services Register (PSR)



Approx. one third of the sample live in a household where one or more person is in receipt of benefits

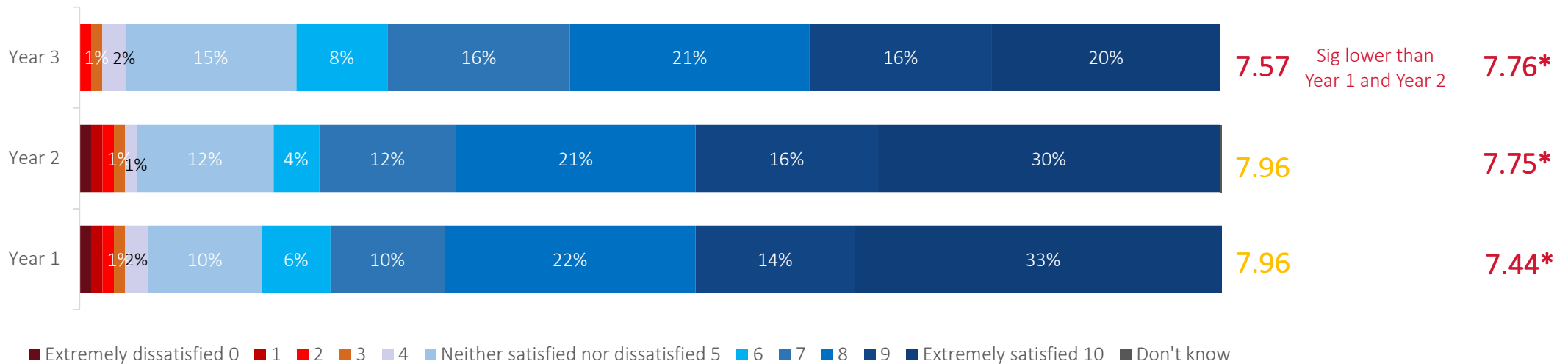


- SSW significantly more likely to have an annual household income of under £17,005 pa and be in receipt of benefits
- There were no significant differences by year.

CUSTOMER PERCEPTIONS

OVERALL SERVICE SATISFACTION

The mean score of the overall satisfaction in Year 3 was significantly lower than its in Year 2 and Year 1, with a decrease in the proportion of customers who gave the score 10 out of 10, and an increase in the percentage of those who were neither satisfied nor dissatisfied or scored 6 or 7 out of 10. There was a slight decrease in year 3 of those scoring 0-4 (dissatisfied).



SIG DIFFERENCES - YEAR 3

OLDER AGE GROUPS (50-65+) SCORE SIG HIGHER THAN YOUNGER AGE GROUPS (50-64: 7.81, 65+: 7.73 VS 18-34: 7.19, 35-49: 7.22)

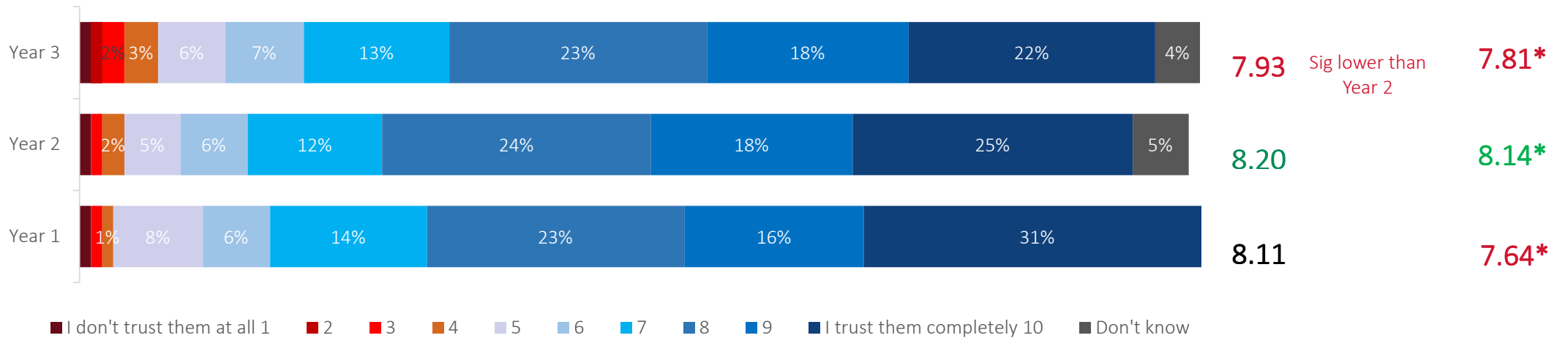
SEGMENT B(8.25) SCORE SIG HIGHER THAN SEGMENT A (7.49), SEGMENT C (7.64) AND SEGMENT E (6.69)

* SSC Customer Promises Tracker results: 437 online surveys between May 2022 and March 2023, 414 in 2021/22 and 407 in 2020/21. In all years, a representative sample of household customers surveyed.

CUSTOMER PERCEPTIONS

TRUST

The mean score of the trust level in Year 3 was lower than both previous years, but significantly lower than year 2, with a decrease in the proportion of customers who gave the score 10 out of 10, and a slight increase in the percentages of those who scored their trust in SSW/CAM lower than 6.



SIG DIFFERENCES – YEAR 3

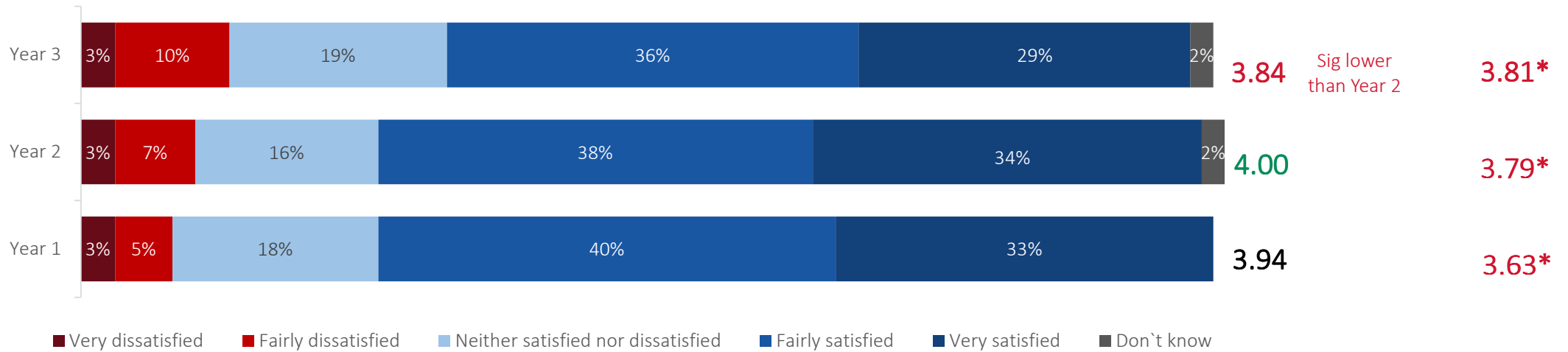
Segment E(7.30) SCORE **SIG LOWER** THAN SEGMENT B(8.35), SEGMENT A (8.03), AND SEGMENT D (8.17)

* SSC Customer Promises Tracker results: 437 online surveys between May 2022 and March 2023, 414 in 2021/22 and 407 in 2020/21. In all years, a representative sample of household customers surveyed.

CUSTOMER PERCEPTIONS

VALUE FOR MONEY

The mean score of the overall satisfaction in Year 3 was significantly lower than in Year 2 and slightly lower than Year 1, with a decrease in the proportion of customers who gave the score 10 out of 10, and an increase in the percentage of those who were neither satisfied nor dissatisfied, and fairly dissatisfied.



SIG DIFFERENCES - YEAR 3

DE (3.99) IS SIG HIGHER THAN C1 (3.69). Segment E(3.51) IS SIG LOWER THAN SEGMENT B(4.01), SEGMENT A (3.89), AND SEGMENT C (3.95)

* SSC Customer Promises Tracker results: 437 online surveys between May 2022 and March 2023, 414 in 2021/22 and 407 in 2020/21. In all years, a representative sample of household customers surveyed.

YEAR 3 (2022/23) CUSTOMER PRIORITIES



KEY EVENTS IN THE LAST 12 MONTHS

WATER RELATED

PN 22/22 Paying fair: Ofwat calls on water companies to support customers struggling to pay
23 May 2022

Ofwat has today published new guidelines for water companies to help household customers across England and Wales pay bills, get help and repay debts.

Water companies report supply issues as heatwave causes demand to soar

Millions more litres of water are expected to be used on Monday.

Claudia Rowan • Sunday 17 July 2022 19:32

South Staffs Water raises spectre of hosepipe bans if heatwave goes on

Residents have been urged to reduce their water usage immediately as the country braces for days of sweltering heat

News By Nazmi DeSouza 16:28 15 Jul 2022

Cambridge finds 'forever chemicals' in its water

August 25, 2022 By The Associated Press

UK heatwave

Water companies 'letting down' customers and the environment

8 December 2022

Watchdog to block shareholder payouts if water companies in England and Wales miss targets

Ofwat says new powers will be used if firms fail to reach performance and environmental goals

Media ramps up scrutiny of water firms on river pollution

Last week saw a surge in media interest in river water quality and, in particular, sewage pollution from storm overflows.

Water firms may owe UK customers £163m for spillages, say experts

Exclusive: Raw sewage releases exploit 'monopoly' of suppliers, argue corporate wrongdoing specialists

Sewage hits dozens of beaches in England and Wales after heavy rain

17 August 2022 • Comments

South Staffs Water and Cambridge Water have increased the income threshold of their social tariff from £17,005 per year to £19,050, so that more customers are eligible.

Serious data breach affecting financial information of South Staffs Water and Cambridge Water customers

Apr 22 May 22 Jun 22 Jul 22 Aug 22 Sep 22 Oct 22 Nov 22 Dec 22 Jan 23 Feb 23 Mar 23

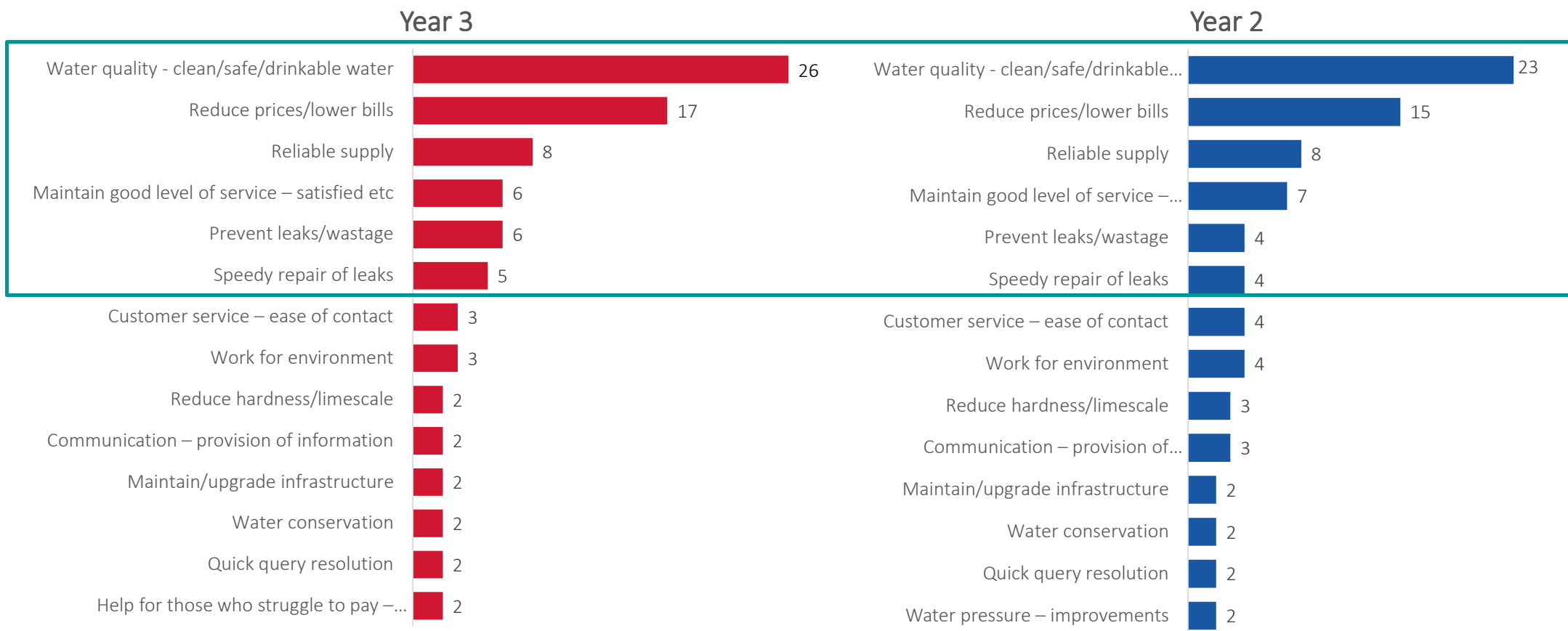
Energy price: Bill shock for millions as rises hit

1 April 2022 • Comments

QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON

Spontaneous priorities in year 3 fall into similar categories as those mentioned by customers in year 1 and year 2. Mostly focussed on water hygiene and lower bills.



Q18. Please think about the services you receive from South Staffs Water/Cambridge Water and then tell us the one thing you really want them to focus on doing.

Please see Appendix for Year 1 data

QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON – EXAMPLES

Comments in Year 3 were similar to what we've seen last year, mostly centred around three areas

HYGIENE PRIORITIES

- Water quality
- Affordability
- Leakage
- Reliability
- Efficient customer service
- Good communication/notification
- Bill support (financial)
- Priority Service support

ENHANCING PRIORITIES

- Water Pressure
- Environment
- Planning
- Water resources/sustainability
- Hardness/limescale

FUTURE PRIORITIES

- App provision
- Roll out of smart metering

Keeping the water drinkable

Fixing leaks quickly

Lower the bills. Our water bills are so expensive, the company should be focusing on reducing costs as much as possible & driving down bills.

Minimising water wastage

Answering the telephone and dealing with problems quickly

To protect the environment, climate change is very important.

Cleaner and better tasting water. Reduce the level of limescale in the water as much as possible.

Uninterrupted service with complete trust

Making sure meter readings are up-to-date not estimated

MEASURING PRIORITIES

METHODOLOGY

Priorities assessed through a MaxDiff approach. Participants are shown ten sets of options. In each option set they are presented with 4 different areas that SSC could focus on and asked to say which is most and which is least important to them. In total 20 different priority areas are assessed. This deck focuses on Year 3 (quarters 1-4) and includes comparisons between Year 3 and Year 1& Year 2 findings. Participants were also asked to provide open-ended answers to explain for the attribute they selected as the most important area.

From the four options below please select the one you think is the most important for South Staffs Water to focus on and the one which is the least important:

Least important

They have accurate bills that are clear making it easy to understand what you are being charged for, how much you owe and what action you need to take next. 1

The water always comes out of the taps at a pressure that does not impact on the way you use water at home - e.g. taking a shower/bath, using a hose 1

They are easy to deal with by quickly and effectively resolving any queries you have about your water services 1

They provide extra support for customers who are struggling to pay their bills - for example, discounted bills or payment breaks 1

Most important

Q35. To help us understand your choices, please tell us why you selected #insert most important attribute selected at MaxDiff1# as the most important area for South Staffs Water/Cambridge Water to focus on?

15

*Full questionnaire and stimulus are found in [Appendix B & C](#)

DESIGN OF THE MAXDIFF











- Experimental design created of 10 choices per person, blocked into 20 sets. Each option appeared twice in each set.
- Information about all the different options was shown to participants prior to and during the exercise (because minor differences only found in Year 2 between uninformed and informed priorities)
- Econometric (logit) models were estimated on the choice data. Priority rankings were derived from the rank order of the coefficients.

CHANGES IN PRIORITY AREAS

- MORE REGULAR METER READINGS: They provide customers with meter readings on a regular basis (at least [Y3: monthly / Y1&2: quarterly]) to allow them to monitor and better understand how much water they use
- WATER SAVING INCENTIVES: They provide incentives to customers who use less water – for example, tariffs that are lower if you use [Y3: less water over a 12 month period / Y1&2: water outside of times of peak demand]
- ACCURATE BILLS: included in Y3 and Y2 only
- METER INSTALLS and WEBSITE: included in Y1 only (low-ranked areas, dropped)
- Minor changes in the wording of WATER PRESSURE, WIDE RANGE OF WAYS TO CONTACT, SERVICE SUPPORT (VULNERABLE PSR) between Y1 and Y2.

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES











TOP TO BOTTOM - PRIORITY SCORES*

HEADING	DESCRIPTION	SCORE
 RELIABILITY OF WATER QUALITY	They make sure your household receives water supplies that are high quality and always safe to drink	16.0
 BILL AFFORDABILITY	They keep the cost of water affordable for customers, today, tomorrow and long into the future	11.6
 LEAKAGE REDUCTION	They quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks	9.7
 LONG-TERM SUPPLY PLANNING	They have detailed plans in place to make sure drinking water always comes out of your taps – today, tomorrow and long into the future	7.3
 FINANCIAL BILL SUPPORT	They provide extra support for customers who are struggling to pay their bills – for example, discounted bills or payment breaks	5.6
 SENDING INCIDENT NOTIFICATIONS	They will always tell you if your water supply is to be cut off temporarily and/or if there is an issue with the quality of your water	5.6
 PROTECTING WATER RESOURCES	They actively protect the environment by not taking too much water from rivers & underground water sources and working with landowners & farmers to ensure water sources are not damaged by pollution	5.3
 SERVICE SUPPORT (VULNERABLE PSR)	They provide support for customers who need extra help accessing their services – for example, delivering bottled water if the water is cut off or braille bills	4.0
 ACCURATE AND INFORMATIVE BILLS	They have accurate bills that are clear making it easy to understand what you are being charged for, how much you owe and what action you need to take next	3.9
 MITIGATING WATER HARDNESS	They make sure your household is not impacted by the effects of hard water - for example, limescale in your appliances and taps, or particles/scum floating in the water when you make a drink	3.8

* Priority scores are a measure of preference intensity on a 0-100 scale.

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

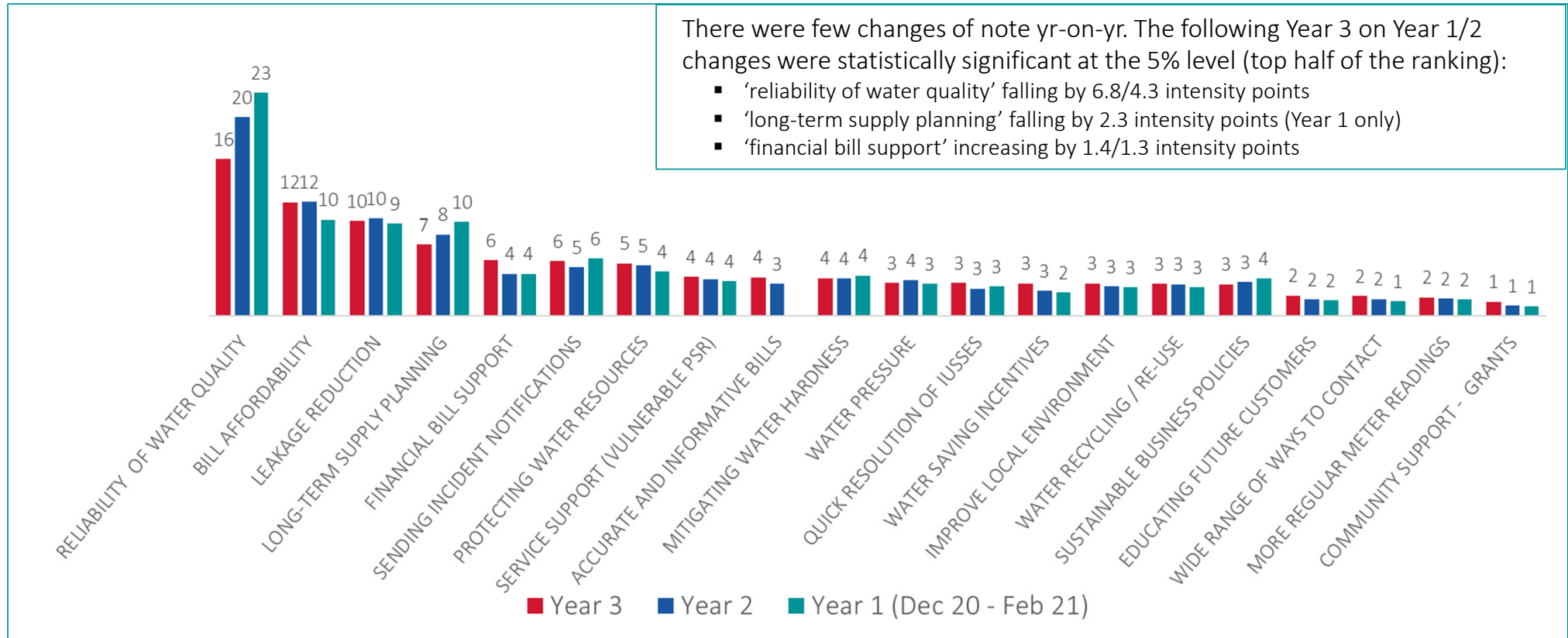
TOP TO BOTTOM - PRIORITY SCORES* (CONT.)

HEADING	DESCRIPTION	SCORE
 WATER PRESSURE	The water always comes out of the taps at a pressure that does not impact on the way you use water at home – e.g. taking a shower/bath, using a hose	3.4
 QUICK RESOLUTION OF ISSUES	They are easy to deal with by quickly and effectively resolving any queries you have about your water services	3.4
 WATER SAVING INCENTIVES	They provide incentives to customers who use less water – for example, tariffs that are lower if you use less water over a 12-month period	3.3
 IMPROVE LOCAL ENVIRONMENT	They improve the environment in the areas they supply, by offering grants to support local projects that improve natural habitats – i.e. trees, plants and animals	3.3
 WATER RECYCLING / RE-USE	They pro-actively work with households and developers to adopt approaches to re-use water – i.e. rainwater harvesting and ‘grey’ water recycling, where less treated water is used for activities like watering the garden and flushing the toilets	3.3
 SUSTAINABLE BUSINESS POLICIES	They focus on becoming a sustainable business that reduces the environmental impact of its operations - for example, reducing carbon emissions, waste that goes to landfill and single use plastics	3.2
 EDUCATING FUTURE CUSTOMERS	They work closely with primary, secondary schools and higher education bodies to educate young people about the value of conserving and re-using water	2.0
 WIDE RANGE OF WAYS TO CONTACT	They provide a wide range of ways to contact and interact with them so that any customer can easily access their services and support – e.g. face-to-face, phone, website, webchat, e-mail, mobile APP, letter	2.0
 MORE REGULAR METER READINGS	They provide customers with meter readings on a regular basis (at least monthly) to allow them to monitor and better understand how much water they use	1.9
 COMMUNITY SUPPORT - GRANTS	They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply	1.4

* Priority scores are a measure of preference intensity on a 0-100 scale.

YEAR 3 ON YEAR 1&2 COMPARISON OF PRIORITY SCORES*

INFORMED



* Priority scores are a measure of preference intensity on a 0-100 scale.

Informed priority scores shown for Years 1&2

* 'Accurate and informative bills' included in Years 2&3 only*

YEAR 3 ON YEAR 1&2 COMPARISON OF PRIORITY SCORES*

INFORMED by BP area

Long-term ambitions



Our service
We will use cutting edge technology and ensure the infrastructure is in place so that customers always receive resilient, high-quality water supplies



Our environment
We will lead in protecting and enhancing the environment- working with partners to ensure sustainable water supplies and flourishing local habitats.



Our customers
We will innovate to exceed customers' expectation of our service, end water poverty and make sure help is always available for those who need more support

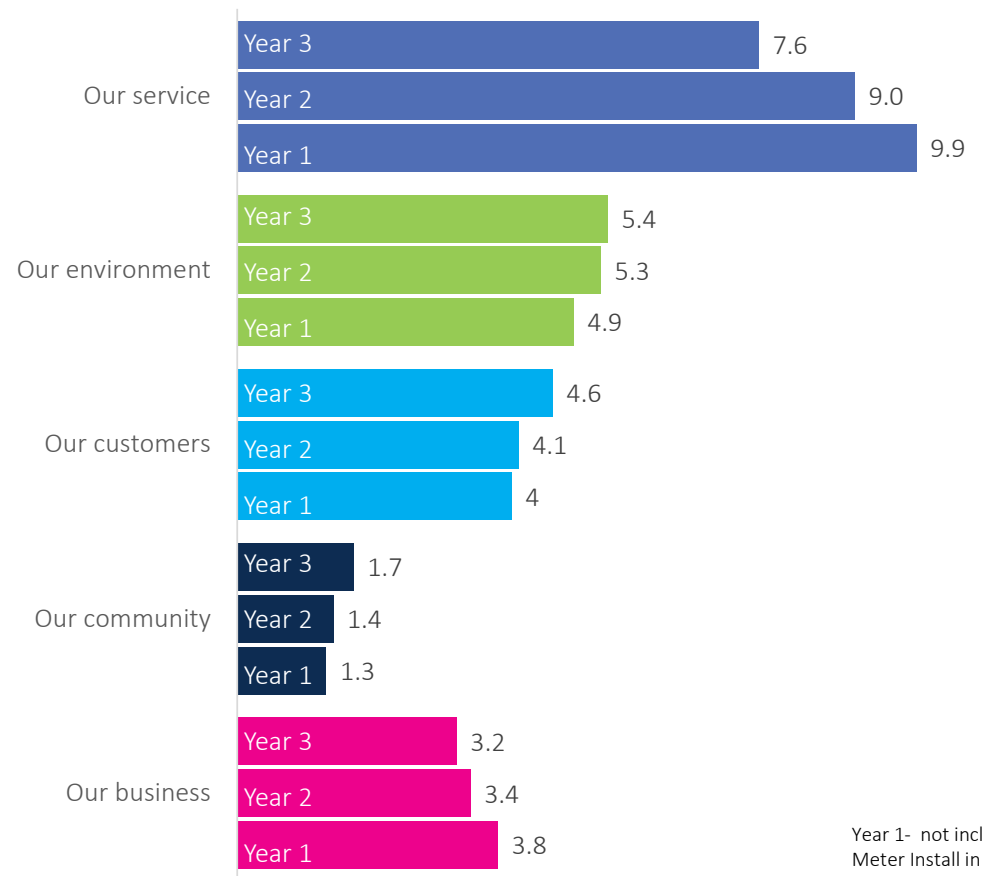


Our community
We will use partnerships and education to help lift up lift our communities, creating space and opportunities to help people work and thrive



Our business
We will lead in adapting to climate change and will run a safe, efficient and sustainable business, with a highly – skilled workforce.

Year on year comparison by BP areas



Year 1- not include Website & Meter Install in analysis
Accurate bills starts from Year 2

YEAR 3 ON YEAR 1&2 COMPARISON OF PRIORITY SCORES*

INFORMED by BP area

Long-term ambitions



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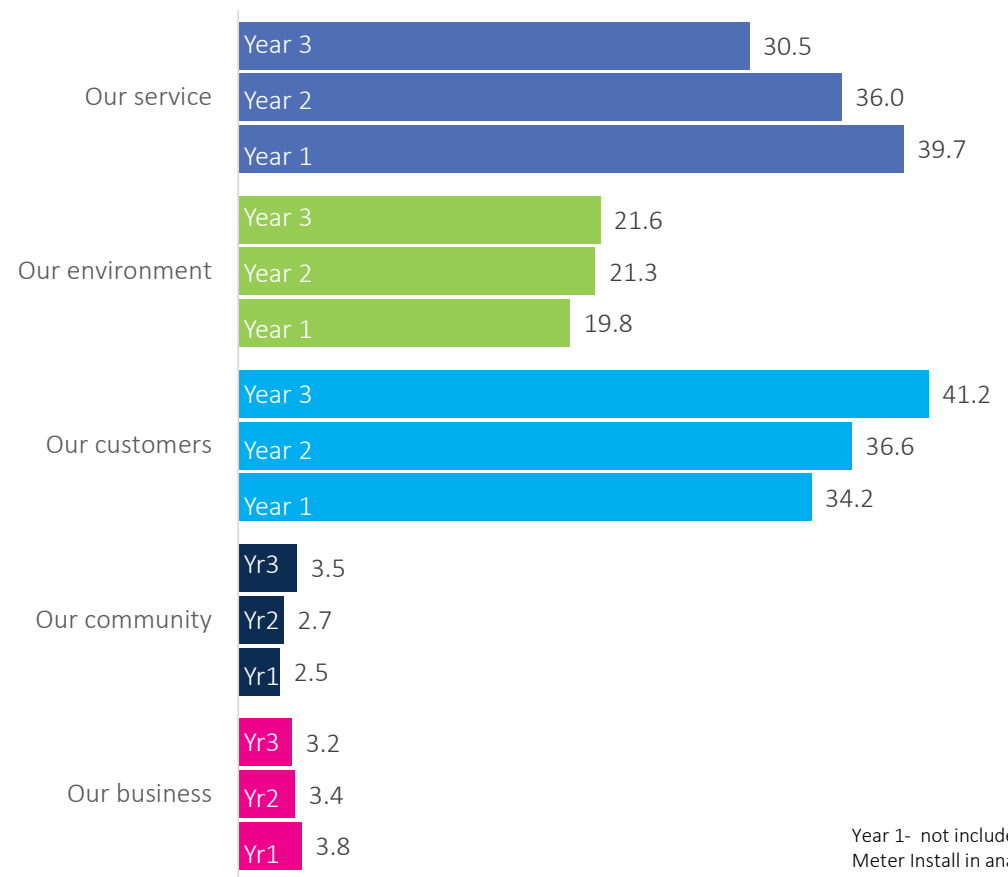


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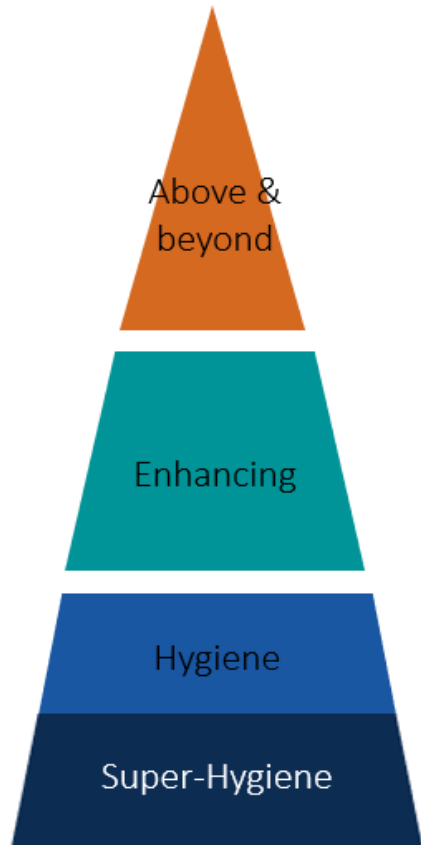
Year on year comparison by BP areas



Year 1- not include Website & Meter Install in analysis
Accurate bills starts from Year 2

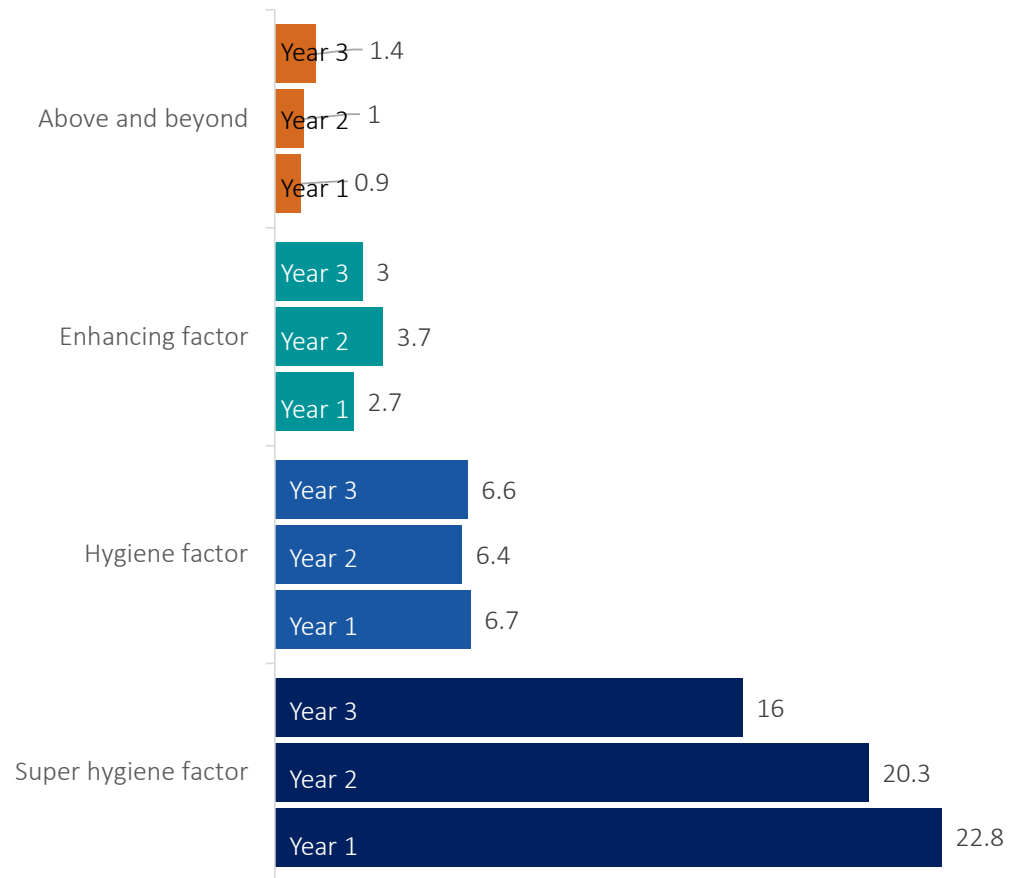
YEAR 3 ON YEAR 1&2 COMPARISON OF PRIORITY SCORES*

INFORMED by Hierachy



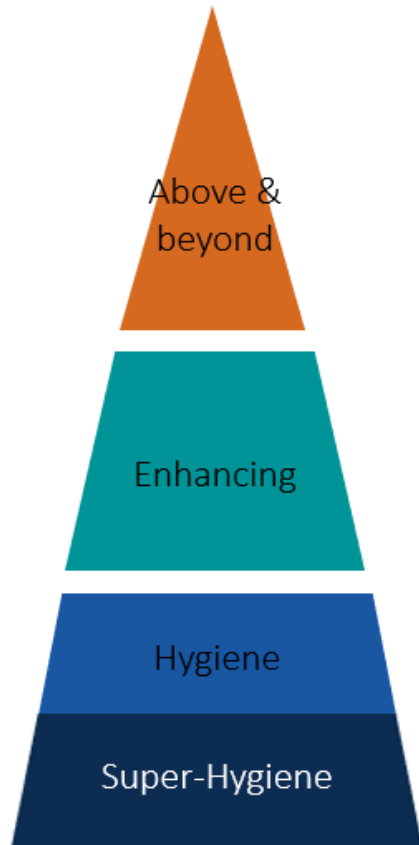
Year 1- not include Website & Meter Install in analysis
Accurate bills starts from Year 2

Year on year comparison by BP areas



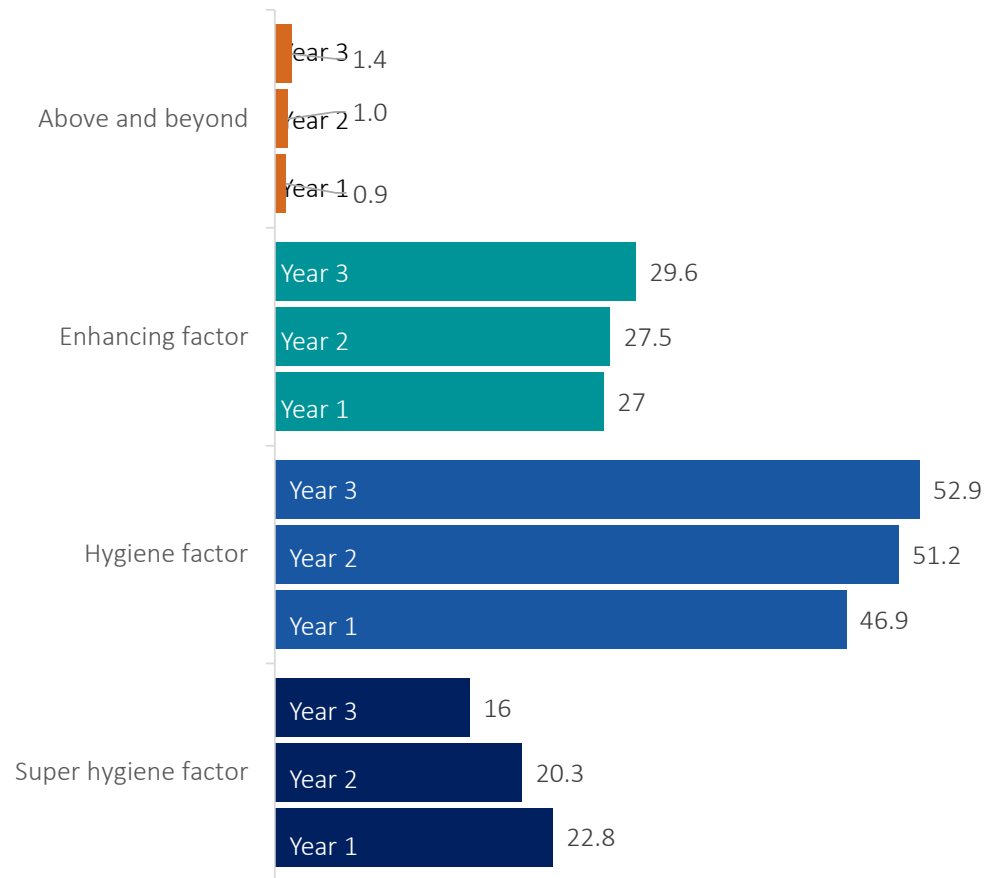
YEAR 3 ON YEAR 1&2 COMPARISON OF PRIORITY SCORES*

INFORMED by Hierachy

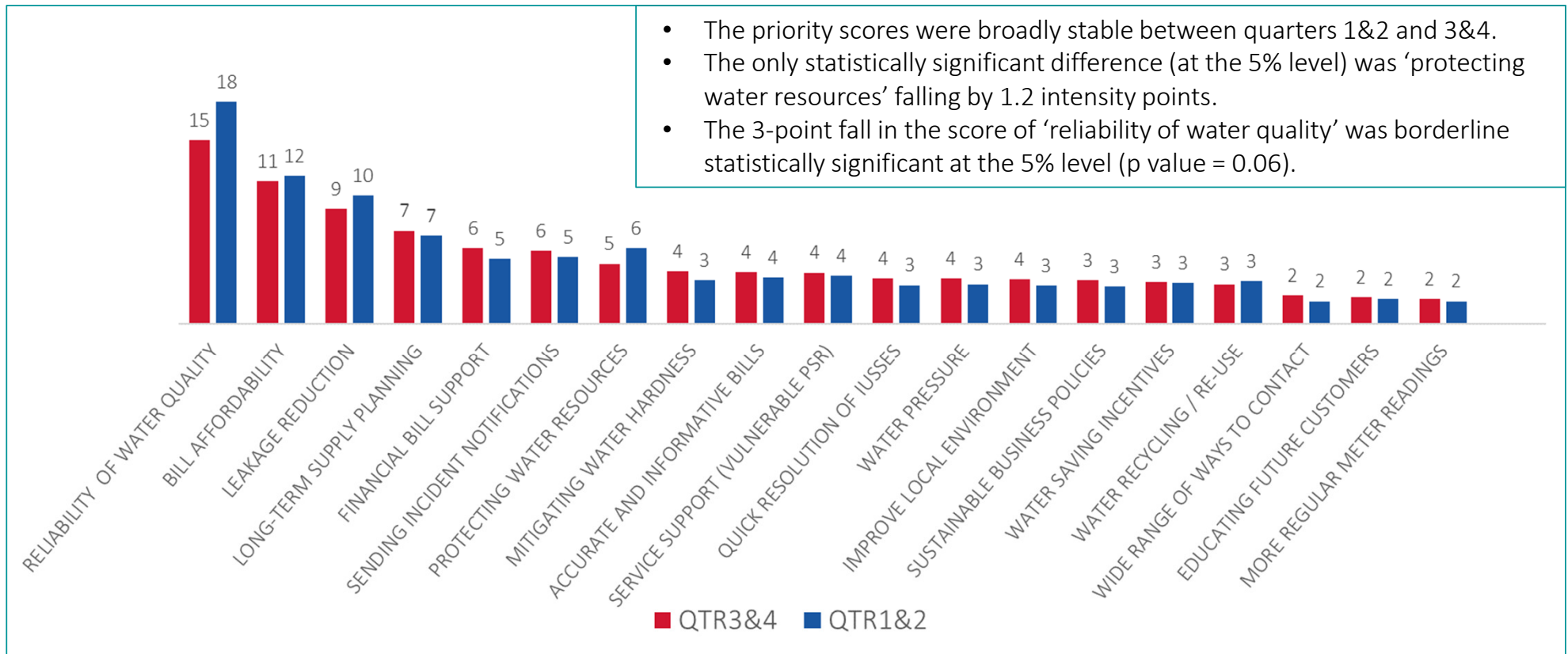


Year 1- not include Website & Meter Install in analysis
Accurate bills starts from Year 2

Year on year comparison by BP areas



YEAR 3 QTR 3&4 VS QTR 1&2 COMPARISON OF PRIORITY SCORES*



* Priority scores are a measure of preference intensity on a 0-100 scale.*

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – RELIABILITY OF WATER QUALITY

Customers call for the company to continue to provide safe drinking water, that is free of bacteria and viruses

Water viewed as an essential human right	Safe drinking water
<p><i>Water is essential to every thing we do in life our health is the most important thing with out water or poor quality water life deteriorates.</i></p> <p><i>It's important that people have complete faith in their water supply.</i></p> <p><i>Safety is everything, including households. Water is instrumental to a families state of mind and everyday lives. It's taken for granted but that's because it's a great service.</i></p> <p><i>It is a basic health issue and is the least we should expect from a water supplier.</i></p>	<p><i>Clean safe to drink water is essential to health and well being. Those in poor countries where they don't have access to clean water to consume and use for sanitary purposes clean are continually suffering with disease, illness and malnutrition.</i></p> <p><i>What you drink affects your health so water needs to be safe to drink.</i></p> <p><i>We use water and drink it so it should be high quality.</i></p> <p><i>This should always be there priority ensuring we have a clean and safe water supply.</i></p>

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – BILL AFFORDABILITY

Customers fear they won't be able to afford the bills without going into debt or sacrificing their personal hygiene

Concerns over the rising cost of living

Money is going to be tight for a lot of people in the next few years so it has to be spent wisely.

I believe my water rates are expensive and my cost of living is increasing rapidly so we are having to be careful with spending.

It seems obvious to keep prices affordable now and in future would be beneficial to customers.

Salaries are not increasing in line with bills so keeping cost down is important.

The cost of living is very high and people are struggling.

Clean water is a human right and people who are already struggling will be the first to suffer if prices become excessive.

With the cost of living being as it is, having people be able to access water cheaply is essential

The cost of living prices are going up so much and water is a necessity for everyone so it's really important that it's affordable and accessible to all.

All bills are increasing and the cost of living is becoming unsustainable.

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – LEAKAGE REDUCTION

Reasons allude to unresolved water leaks costing the customers in the long term.

Unresolved water leaks costing the customers	It doesn't make sense to waste	It's not sustainable
<p><i>This would be helpful in order to prevent and reduce large amount of water loss each day, also repairing and replacing pipes is incredibly important for people as it could lead to further damage.</i></p> <p><i>The quicker leaks are repaired, the less money is lost through water loss, I would assume.</i></p> <p><i>The more loss of water the more the cost is passed to customer.</i></p>	<p><i>We all need to use water wisely. So it's important not to lose water through leaks.</i></p> <p><i>Water is in short supply so we need to repair quickly to make sure that there is no much water lose.</i></p> <p><i>Leaks are such a waste!</i></p>	<p><i>Huge amounts of water can be lost, with climate change that's not sustainable.</i></p> <p><i>Water is such a precious commodity and so it's important to maximise it, rather than to waste it through leaks.</i></p>

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – LONG TERM SUPPLY PLANNING

Reasons allude to forward preparation in case of emergencies and disruptions

Water is too essential to live without	So it doesn't impact daily life
<p><i>Water is essential for multiple things so it needs to be constantly accessible.</i></p> <p><i>Water is essential to life. We cannot manage without it.</i></p> <p><i>Because water is life and we will always need it</i></p> <p><i>Water must not be cut off at anytime</i></p>	<p><i>I don't store water in the bath and therefore need a continuous supply without the need to buy bottled water.</i></p> <p><i>Ensuring basic services are secure and reliable is very important.</i></p> <p><i>Everyone should always be assured that there is running water.</i></p>

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – SENDING INCIDENT NOTIFICATIONS

Customers like to be informed, so they can prepare for the disruptions

To avoid inconveniences	Customers can prepare for alternatives	This is expected from a water company
<p><i>Earlier this year my water was cut off without warning I had to manage without water for nearly 2 days, I could not wash, boil any food and could not use the toilet and had to buy water to drink.</i></p> <p><i>Important if you are running central heating etc.</i></p>	<p><i>To plan for this occurrence if possible.</i></p> <p><i>This has to do with the health and safety of customers. And to ensure people make changes to their use or find other ways to get the water they need.</i></p> <p><i>So I can prepare for loss of water.</i></p> <p><i>So we are informed and can make provision.</i></p>	<p><i>Obviously you need to know if there is going to be an issue with water supply.</i></p> <p><i>Because it is imperative that I know is the water supply is going to be cut off or if there is an issue with it. My water has not been cut off and as far as I know there have not been any issues with it, but if there were, communication from Cambridge Water would be vital.</i></p>

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – PROTECTING WATER RESOURCES

There is a strong sense of priority placed on protecting the environment for now and future generations.

Important to protect the environment	Thinking about future generations
<p><i>With the issue of fresh water changing it's important we consider how to mitigate environmental issues.</i></p> <p><i>Improving the environment is good for people, animals etc.</i></p> <p><i>By reducing carbon emissions etc, our weather will become more stable and give more stable water supply.</i></p> <p><i>Because our environment is precious</i></p>	<p><i>Reducing carbon emissions is the single most important thing for our future survival.</i></p> <p><i>Kids are our future. We need to teach them how to use the resources we've got well.</i></p>

Hygiene vs Super-hygiene priorities

Important things SSC could do

Hygiene

HYGIENE PRIORITIES YEAR 1

- Water quality
- Affordability
- Leakage
- Reliability
- Efficient customer service
- Good communication/notification
- Bill support
- Service support

HYGIENE PRIORITIES YEAR 2

- Water quality
- Affordability
- Leakage
- Reliability
- Efficient customer service
- Good communication/notification
- Bill support
- Priority Service support

HYGIENE PRIORITIES YEAR 3

- Water quality
- Affordability
- Leakage
- Reliability
- Efficient customer service
- Good communication/notification
- Bill support
- Priority Service support

=> The list of hygiene priorities has remained consistent across 3 years, proving the importance of these areas to customers, which should be focused on by SSC in its plans.

“Super” Hygiene



Must-do as a water company

Reliability of water quality

‘It is a basic health issue and is the least we should expect from a water supplier’

‘Because this is a basic human need and something we should get as a minimum’

‘Everyone uses water every day - the quality of the water should be the highest priority. People rely on the water source, especially vulnerable people.’

‘Water is a basic human right, no-one should be denied this right because they do not have sufficient funds’

Affordability

‘Water is a basic need so needs to be readily available at a good standard’

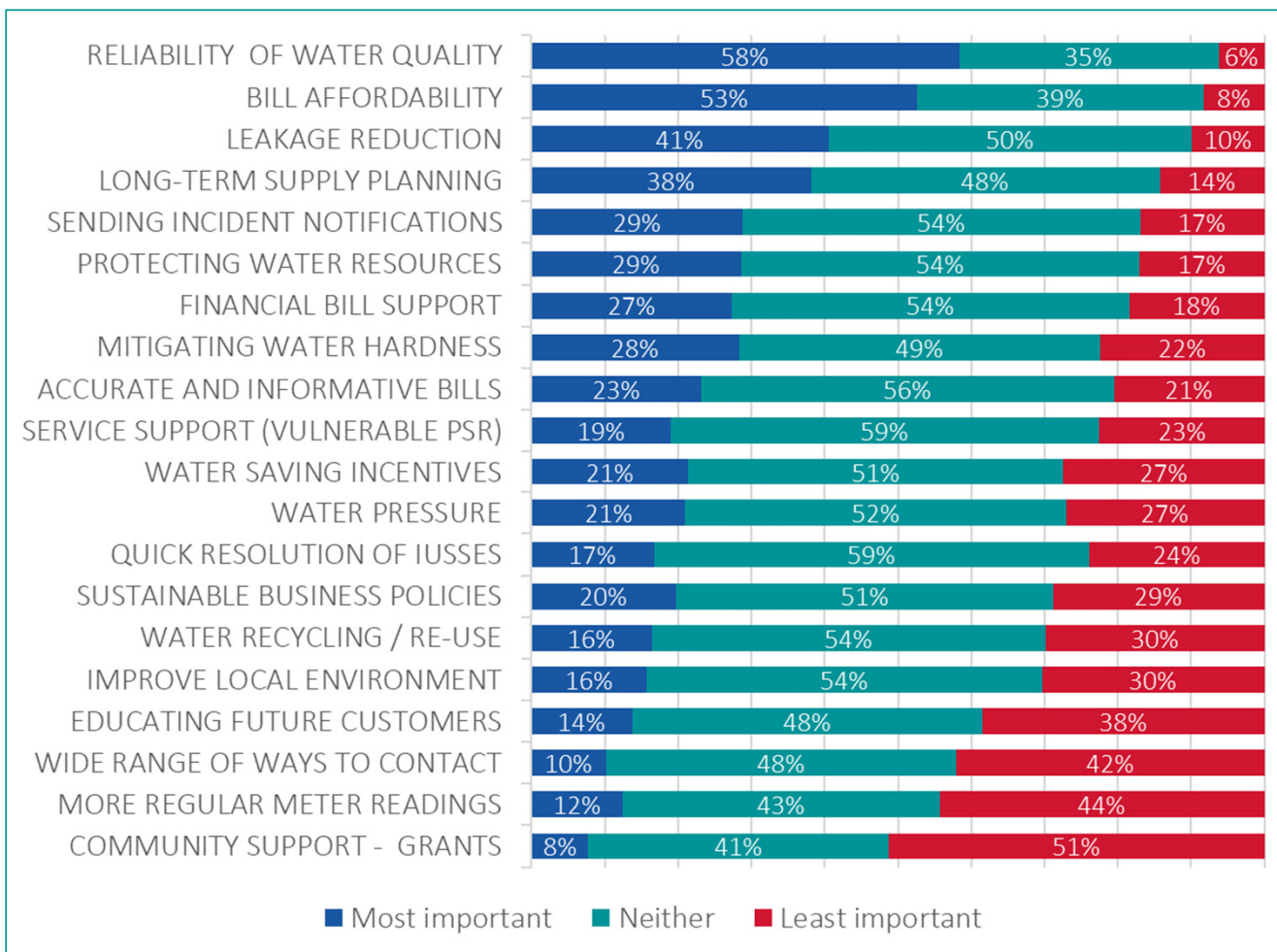
‘Water must be affordable to every household whatever their financial circumstances’

=> Ensuring the reliability of water quality and Affordability are considered the must-do things for a water company. Not only because these factors have remained the top 2 priorities across 3 years, but throughout responses to open-ended questions, customers believe water is a basic human necessity.

Therefore, supplying safe and high-quality water should be a minimum for a water company, and water should be made affordable for everybody regardless of their financial circumstance.

YEAR 3: QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - BEST-WORST RANKING*



There is a very high level of agreement between the ranking derived from the econometric model and the Best-Worst ranking (rank correlation = 0.98 on a 0-1 scale)

Statistically significant Year 3 on Year 1 changes in 'Most important' percentages (5% level)

INITIATIVES	Year 3	Year 1	Change
RELIABILITY OF WATER QUALITY	58%	70%	↓
LONG-TERM SUPPLY PLANNING	38%	43%	↓
SENDING INCIDENT NOTIFICATION	29%	39%	↓
PROTECTING WATER RESOURCES	29%	23%	↑
WATER RECYCLING	16%	21%	↓
IMPROVE LOCAL ENVIRONMENT	16%	12%	↑
WIDE RANGE OF WAYS TO CONTACT	10%	14%	↓

* The percentages (weighted) are calculated as number of times the initiative was chosen as most important ('best')/least important ('worst'), or neither, divided by number of times the initiative appeared in the choice tasks (across all participants). The ranking is based on the difference between 'best' and 'worst' percentages.

CHANGES IN PRIORITIES

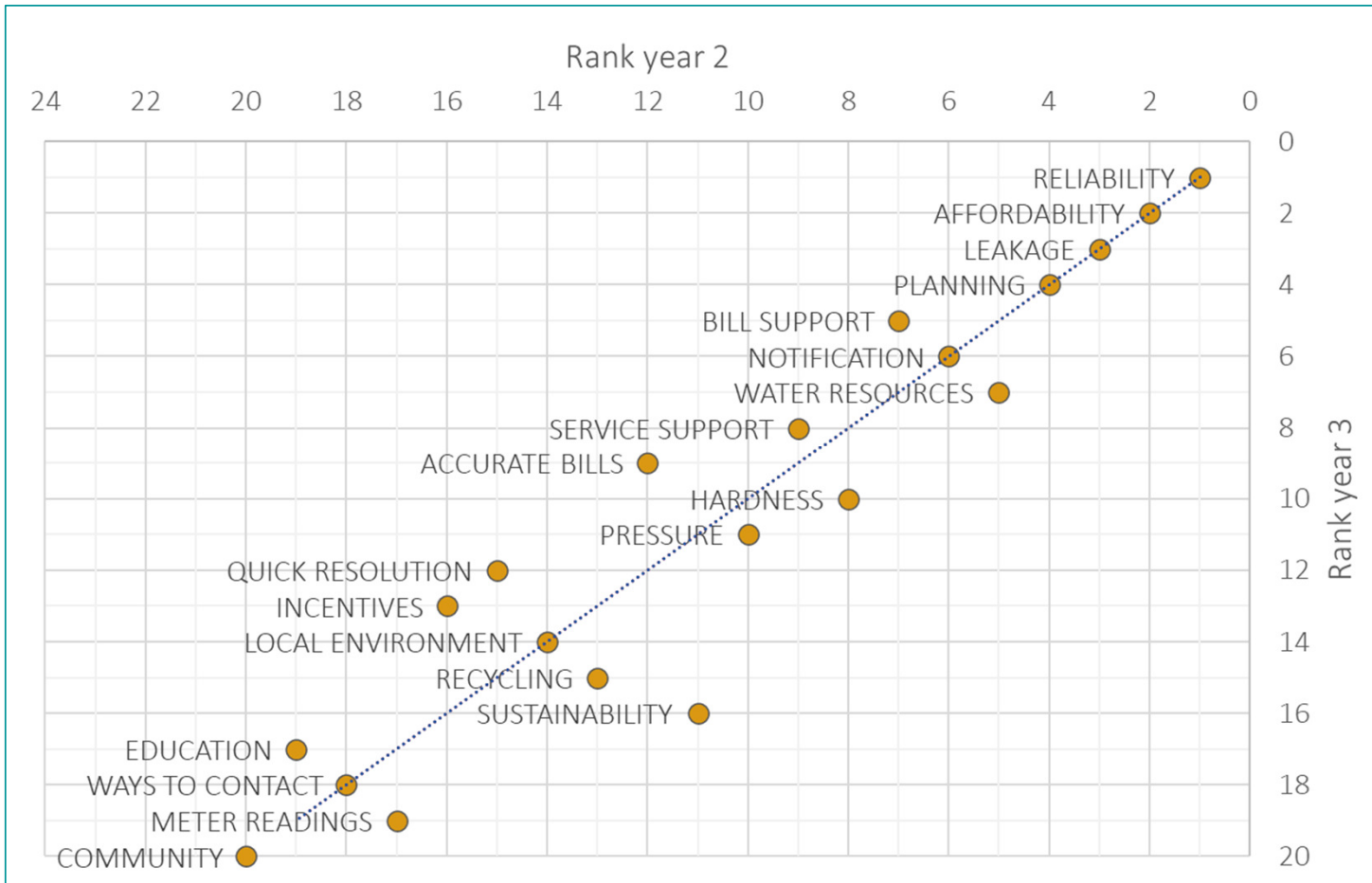
COMPARISON OF RANKINGS: YEAR 3 vs YEARS 1&2

	Year 3	Y3 vs Y2	Y3 vs Y1	Year 2 (informed)	Year 1 Dec 20-Feb 21 (informed)
RELIABILITY OF WATER QUALITY	1			1	1
BILL AFFORDABILITY	2			2	2
LEAKAGE REDUCTION	3		↑	3	4
LONG-TERM SUPPLY PLANNING	4		↓	4	3
FINANCIAL BILL SUPPORT	5	↑	↑	7	7
SENDING INCIDENT NOTIFICATIONS	6		↓	6	5
PROTECTING WATER RESOURCES	7	↓	↓	5	6
SERVICE SUPPORT (VULNERABLE PSR)	8	↑	↑	9	10
MITIGATING WATER HARDNESS	9	↓	↓	8	8
WATER PRESSURE	10		↑	10	11
QUICK RESOLUTION OF IUSSES	11	↑	↑	14	12
WATER SAVING INCENTIVES	12	↑	↑	15	15
IMPROVE LOCAL ENVIRONMENT	13			13	13
WATER RECYCLING / RE-USE	14	↓		12	14
SUSTAINABLE BUSINESS POLICIES	15	↓	↓	11	9
EDUCATING FUTURE CUSTOMERS	16	↑	↑	18	17
WIDE RANGE OF WAYS TO CONTACT	17		↑	17	18
MORE REGULAR METER READINGS	18	↓	↓	16	16
COMMUNITY SUPPORT - GRANTS	19			19	19

- The rankings are relatively stable (correlation = 0.95 for Y3 vs Y2 and 0.94 for Y3 vs Y1)
- Max rank difference of 2 in the top ten ranks
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (years 2&3 only)
 - Ranks revised accordingly

CHANGES IN PRIORITIES

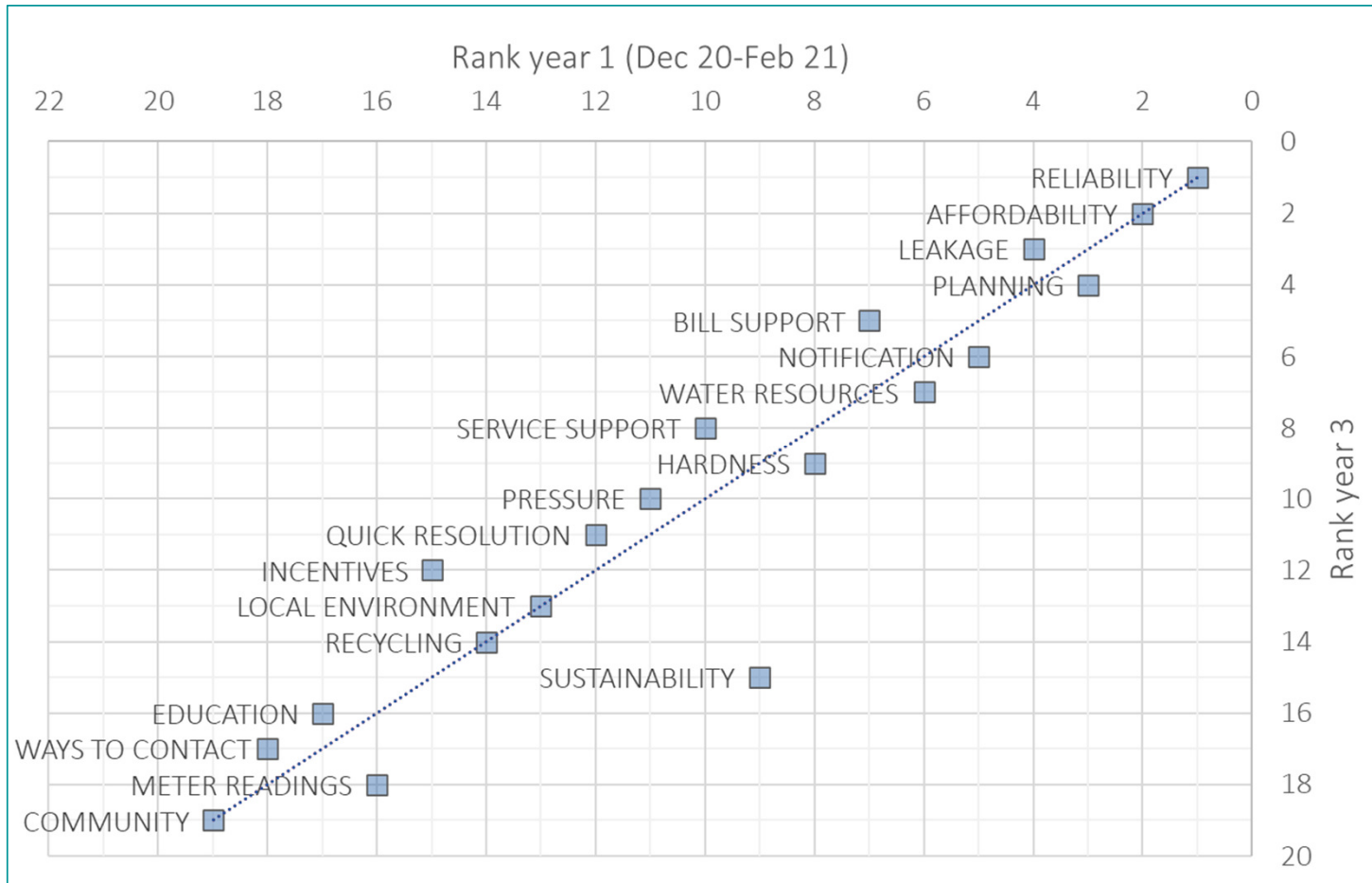
COMPARISON OF RANKINGS: YEAR 3 VS YEAR 2 (INFORMED)



- Priority areas above the line are ranked higher in Year 3 than Year 2
- The ranking is stable overall (correlation = 0.95)
- Among the top seven initiatives, 'Bill support' has risen by two places to 5th rank, while 'Water resources' has fallen two places

CHANGES IN PRIORITIES

COMPARISON OF RANKINGS: YEAR 3 VS YEAR 1 (INFORMED)



- The ranking is stable (correlation = 0.94)
- Those priority areas above the line are ranked higher in Year 3 than Year 1
- 'Bill support' climbed two places
- Some larger differences in the bottom half of the ranking
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (years 2&3 only)
 - Ranks revised accordingly

SEGMENTATION ANALYSIS

METHODOLOGY

Differences in the rankings of initiatives across the customer segments defined based on:

- Region
- Age
- Gender
- Social grade (SEG)
- Household income
- SSC attitudinal/behavioural segmentation
- Meter status
- Service issue
- Vulnerability
- Whether or not participants contacted the company within the last year

Separate models were estimated for each segment and the corresponding rankings were derived. Cells highlighted in green/red in the subsequent tables indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:

- a rank difference of at least 3 places between any segment and the complement 'Other' (e.g. social grade A/B vs C1/C2/D/E combined)
- at least one initiative is in the top third of the ranking (1st to 7th rank)
- the difference between priority scores is statistically significant at the 10% level

➤ NB No significant differences were found by region, gender, and meter status, nor according to whether participants did / did not contact the company within the last year

YEAR 3: DIFFERENCES IN PRIORITIES

COMPARISON OF RANKINGS ACROSS REGIONS

	South Staffs Water	Cambridge Water	
RELIABILITY OF WATER QUALITY	1	1	
BILL AFFORDABILITY	2	3	↑
LEAKAGE REDUCTION	3	2	↓
LONG-TERM SUPPLY PLANNING	4	4	
FINANCIAL BILL SUPPORT	5	7	↑
SENDING INCIDENT NOTIFICATIONS	6	6	
PROTECTING WATER RESOURCES	7	5	↓
SERVICE SUPPORT (VULNERABLE PSR)	10	10	
ACCURATE AND INFORMATIVE BILLS	9	13	↑
MITIGATING WATER HARDNESS	8	16	↑
WATER PRESSURE	11	15	↑
QUICK RESOLUTION OF IUSSES	12	14	↑
WATER SAVING INCENTIVES	14	11	↓
IMPROVE LOCAL ENVIRONMENT	13	12	↓
WATER RECYCLING / RE-USE	15	8	↓
SUSTAINABLE BUSINESS POLICIES	16	9	↓
EDUCATING FUTURE CUSTOMERS	18	17	↓
WIDE RANGE OF WAYS TO CONTACT	17	19	↑
MORE REGULAR METER READINGS	19	18	↓
COMMUNITY SUPPORT - GRANTS	20	20	

- The rankings are relatively similar (correlation = 0.83)
- Initiatives linked to the environment tend to rank higher among CAM customers (Leakage; Water resources; Recycling; Local environment; Sustainability)
- Affordability, Accurate bills, Hardness, and Pressure rank higher among SSW customers
- No significant differences, as defined on the previous slide.

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES

HIGHER PRIORITY FOR.....

BILL SUPPORT (£)

- DE social grades
- Low-income households
- Vulnerable customers



INCIDENT NOTIFICATION

- Younger customers (18-35)
- Segment E



PROTECTING WATER RESOURCES

- Segment B
- Segment E
- Service issue: Traffic disruption



ACCURATE BILLS

- Segment E



MITIGATING HARDNESS

- Service issue: Limescale
- Low-income households



WATER PRESSURE

- High-income households



STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER DEMOGRAPHICS

Segment	Initiative	Rank	Difference
---------	------------	------	------------

Age

18-35 yrs	SENDING INCIDENT NOTIFICATIONS	4th	3
	PROTECTING WATER RESOURCES	10th	-5

Social grade

AB	FINANCIAL BILL SUPPORT	8th	-3
	WATER RECYCLING / RE-USE	7th	9
DE	FINANCIAL BILL SUPPORT	3rd	4

Household income

Up to £327 p.w.	FINANCIAL BILL SUPPORT	3rd	4
£327-£442 p.w.	MITIGATING WATER HARDNESS	7th	3
£722-£1,000 p.w.	FINANCIAL BILL SUPPORT	8th	-3
	SUSTAINABLE BUSINESS POLICIES	7th	9
£1,001+ p.w.	FINANCIAL BILL SUPPORT	16th	-11
	WATER PRESSURE	7th	7

Vulnerability

Vulnerable	FINANCIAL BILL SUPPORT	4th	3
Not vulnerable	FINANCIAL BILL SUPPORT	7th	-3

- Cells highlighted in green/red indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 - the difference between priority scores is statistically significant at the 10%.
- Many differences were significant also in Year 2 (but fewer significant differences in Year 3 than in Year 2):
 - Bill support ranked higher by lower SEG groups, low-income households and vulnerable customers
 - Water recycling ranked higher by higher SEG groups.

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER SEGMENTS AND SERVICE ISSUES

Segment	Initiative	Rank	Difference
---------	------------	------	------------

Segment

Segment B	PROTECTING WATER RESOURCES	4th	3
Segment E	SENDING INCIDENT NOTIFICATIONS	4th	3
	PROTECTING WATER RESOURCES	13th	-8
	ACCURATE AND INFORMATIVE BILLS	7th	4
Segment D	PROTECTING WATER RESOURCES	4th	3

Service issue

Limescale	MITIGATING WATER HARDNESS	7th	3
Leak in a supply pipe	FINANCIAL BILL SUPPORT	11th	-6
Traffic disruption	PROTECTING WATER RESOURCES	4th	3

Ethnicity

British	FINANCIAL BILL SUPPORT	7th	-3
	MITIGATING WATER HARDNESS	10th	-5
	LONG-TERM SUPPLY PLANNING	4th	4
Non-British	FINANCIAL BILL SUPPORT	4th	4
	MITIGATING WATER HARDNESS	5th	5
	LONG-TERM SUPPLY PLANNING	8th	-4

- Cells highlighted in green/red indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 the difference between priority scores is statistically significant at the 10%.
- 'Protecting water resources' ranked higher (lower) by Segment B (Segment E) type
- 'Mitigating water hardness' ranked higher by those who had limescale issues
- 'Long-term supply planning' ranked higher by British
- 'Financial bill support' and 'Mitigating water hardness' ranked higher by non-British.

YEAR 3: DIFFERENCES IN PRIORITIES BY ATTITUDES, CONCERNS, FEELINGS

SIGNIFICANT DIFFERENCES

	Rank	Difference*	
Water will become a scarcer resource in our country in the future ('Agree': 8-10)			
PROTECTING WATER RESOURCES	5	+6	↑
ACCURATE AND INFORMATIVE BILLS	13	-6	↓
I would be willing to change my daily habits to reduce my water usage ('Agree': 8-10)			
PROTECTING WATER RESOURCES	5	+4	↑
ACCURATE AND INFORMATIVE BILLS	14	-7	↓
My water company should do more to reduce its emissions [...] ('Agree': 8-10)			
PROTECTING WATER RESOURCES	4	+6	↑
SUSTAINABLE BUSINESS POLICIES	7	+9	↑
SENDING INCIDENT NOTIFICATIONS	8	-3	↓
I'm concerned about the quality of water in the rivers, streams or lakes in our local area ('Agree': 8-10)			
PROTECTING WATER RESOURCES	5	+5	↑
MITIGATING WATER HARDNESS	14	-7	↓
Customers, the Government and large businesses are equally responsible for reaching Net Zero by 2050			
PROTECTING WATER RESOURCES	4	+3	↑
The [2050 net zero] target [...] is meaningless when other countries continue to increase carbon emissions			
PROTECTING WATER RESOURCES	10	-4	↓
Level of carbon emissions (Level of concern 8-10)			
PROTECTING WATER RESOURCES	4	+6	↑
SUSTAINABLE BUSINESS POLICIES	7	+9	↑
WATER PRESSURE	16	-9	↓
SENDING INCIDENT NOTIFICATIONS	8	-3	↓
Poverty and inequality (Level of concern 8-10)			
FINANCIAL BILL SUPPORT	5	+4	↑
ACCURATE AND INFORMATIVE BILLS	12	-5	↓
Level of pollution – e.g. air, water (Level of concern 8-10)			
PROTECTING WATER RESOURCES	5	+5	↑
ACCURATE AND INFORMATIVE BILLS	12	-5	↓
Unemployment levels (Level of concern 8-10)			
FINANCIAL BILL SUPPORT	4	+3	↑

* Rank difference between complement and segment

- Those concerned about water scarcity / resources gave higher priority to **'Protecting water resources'**
- Those concerned about carbon emissions gave higher priority to **'Sustainable business policies'**
- Those concerned about poverty and unemployment gave higher priority to **'Financial bill support'**
- No significant differences based on feelings about day-to-day life and overall life satisfaction

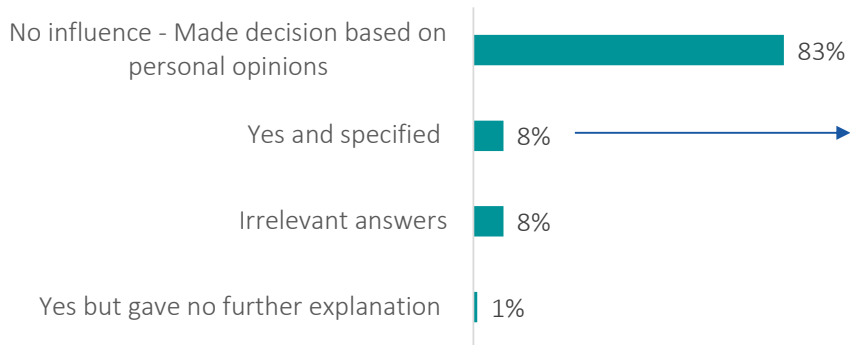
These findings provide additional assurance as to the validity of the priorities obtained from the SP exercise

- Separate models were estimated for each attitude/concern
- Significant differences defined as meeting the following criteria:
 - a rank difference of at least 3 places between any segment and the complement (e.g., concern about poverty: levels 8-10 vs levels 1-7)
 - the initiative is in the top third of the ranking (1st to 7th rank)
 - the difference between priority scores is statistically significant at the 10% level
- Segments based on feelings/overall life satisfaction:
 - Positive feelings only (happy, optimistic, positive, energetic)
 - Negative feelings only (depressed, stressed, worried, tired)
 - Mixed positive and negative feelings
 - Overall life satisfaction 8-10 (on a 0-10 scale)

Influence of the given information on customer's choices of priorities

A majority of customers claimed they made their priority choices during the maxdiff exercise without the given information influencing their choices. Out of those whose choices were influenced by the provided information, content related to environment and sustainability appeared to make the most impact.

Was there anything in the information you read about that influenced each of your choices?



Information about environment protection, sustainability, climate change, and water conservation (31 responses)

'The amount of water used in the region and the risk of reduced availability in the future'

'The information on decreasing rainfall during summer'

'Seeing how many people the company supplies water for and the importance of protecting the environment'

Information about water leaks (9 responses)

'Yes. I did not realise how much water was lost to damaged pipes'

The level of water leakage, while aligned to the national average, still seemed surprisingly high

Information water quality (12 responses)

'Knowing how bad hard water is.'

'The thought that not having water that was safe to drink could put thousands of people at risk of becoming ill or even worse.'

Information about SSW and CAM's commitment to customers (12 responses)

'Your commitment to supplying clean affordable water'

'The tech they are using to improve service'

Information about the importance of the water supply (5 responses)

'The importance of running water'

'Water usage is becoming a problem which needs to be addressed.'

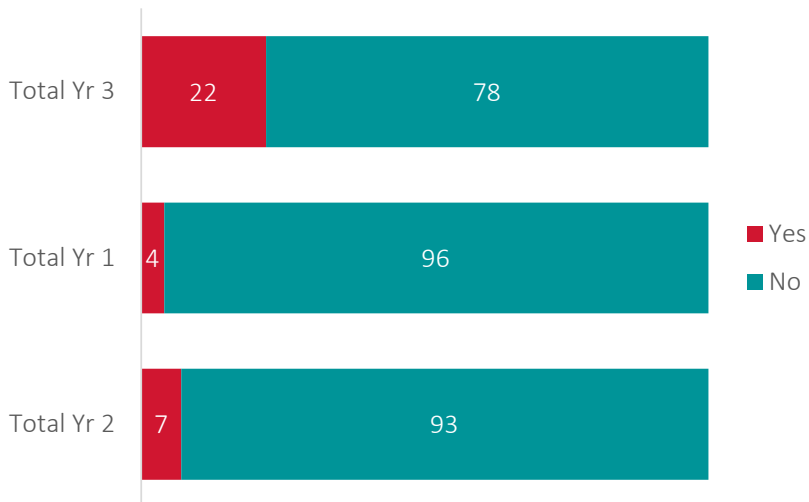
OTHER AREAS OF FOCUS FOR SSW/CAM

WHAT IS MISSING FROM THE ATTRIBUTES?

Overall, 22% of customers thought there are areas of high priority SSW/CAM failed to include in the survey. This figure is significantly higher than in Y2 (7%) and Y1 (4%).

However, when being asked to specify the missing areas, customers' comments seemed to focus on re-enforcing their views on areas that have been covered in the study, such as: the water company's actions to protect the environment and sustainability or keeping the price of water low.

Any areas that weren't included in the choices that you have read that you think Cambridge/South Staffs Water should focus on?



In year 3, due to the incident of the customer data breach in Summer 2022, customers have raised concerns over SSC's data security.

What's missing? - Accountability of water companies

'Manage Customer's data competently to minimise possibility of Cyber-hacking!'

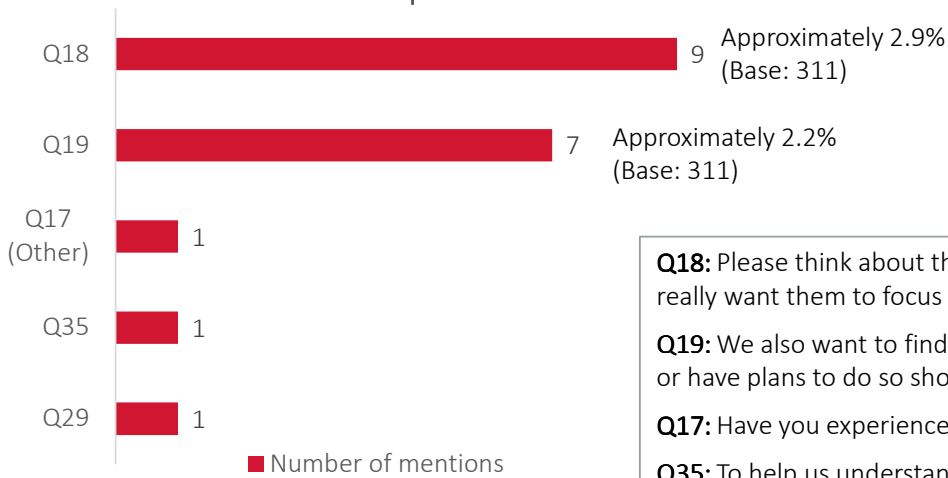
Keep customer data secure

Cyber-attack incident

The incident of the customer data breach has raised concerns among customers about SSC's data security.

Out of 311 participants in **Quarter 4 (Jan –Mar 2023)**, answers related to “**cyber**” and “**data protection**” were given **19 times** in total, mostly at Q18 and Q19 (Questions about the top priorities).

Answers related to data breaches incidents were mentioned at 5 questions...



Manage customer's data competently to minimise possibility of Cyberhacking!

Ensure no more data breaches occur, and should offer a discount to all customers affected.!

Get their IT in shape. The website could use some improvements. Since the cybersecurity incidence last year, they need to stay on top of that too.

Security! I received a letter informing me credentials were compromised from yourselves recently. You serve millions of people. Data breaches are unacceptable in today's age. Please secure our data.

Ensure my details and data are kept securely!

Improved data security my details have been leaked and I am now receiving a lot of spam email on the account.

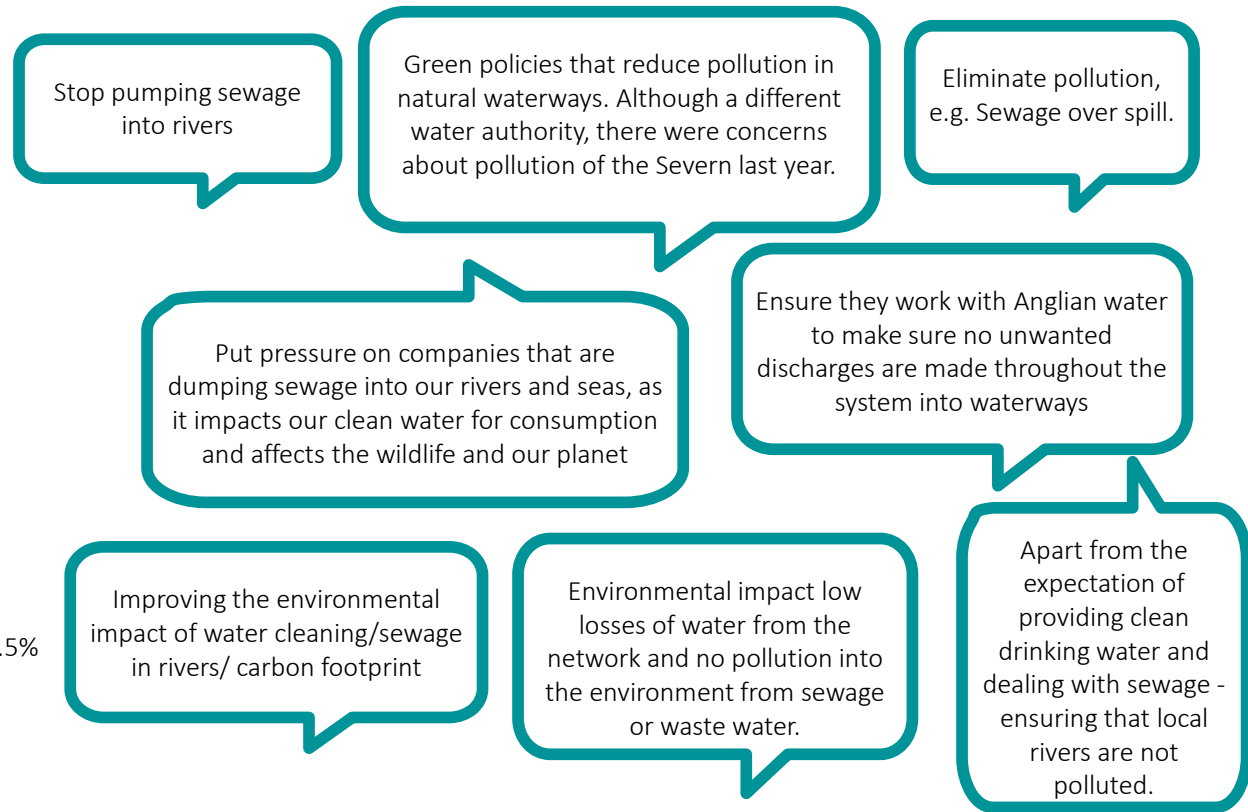
GDPR storing customer's data properly to avoid cyberattacks. Stop selling my details to 3rd party companies who bombard me with expensive plumbing insurance.

- Q18:** Please think about the services you receive from South Staffs Water/Cambridge Water and then tell us the one thing you really want them to focus on doing. What's your number one priority?
- Q19:** We also want to find out what else is important to customers, so now imagine that they have met your number one priority, or have plans to do so shortly. What's your next priority?
- Q17:** Have you experienced any of the following in the last 2 to 3 years?
- Q35:** To help us understand your choices, please tell us why you selected [] most important attribute selected at [] as the most important area for South Staffs Water/Cambridge Water to focus one?
- Q36:** Was there anything in the information you read about that influenced each of your choices?
- Q29:** Please tell us what other area(s) do you think South Staffs Water/ Cambridge Water should focus on?

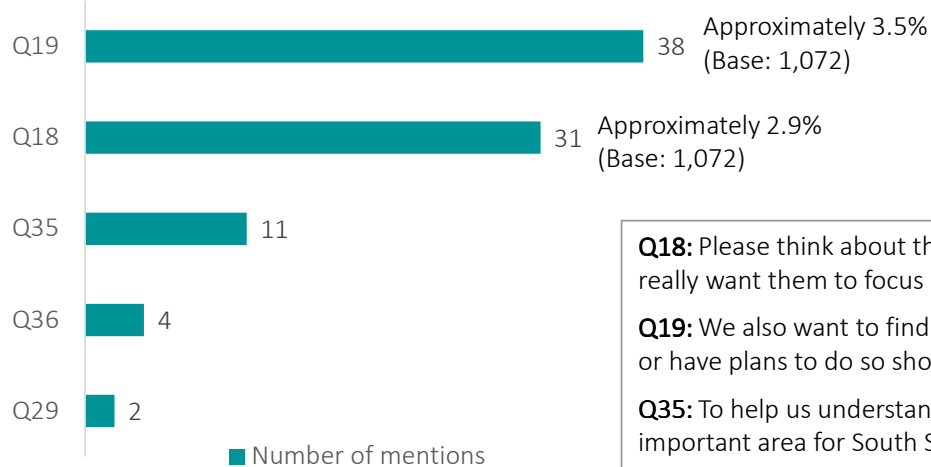
Q28. Were there any areas that weren't included in the choices that you have read that you think South Staffs Water/ Cambridge Water should also focus on?

Pollution incidents

Over the third year, Out of 1,072 participants, answers related to “pollution”, “sewerage spills”, and “river pollution” were given **approximately 86 times** in total, mostly at Q18, Q19 and Q35. Most comments did not mention a specific location but raised concerns over sewage spills/pollution in general. There was only one comment that mentioned pollution of the River Severn.



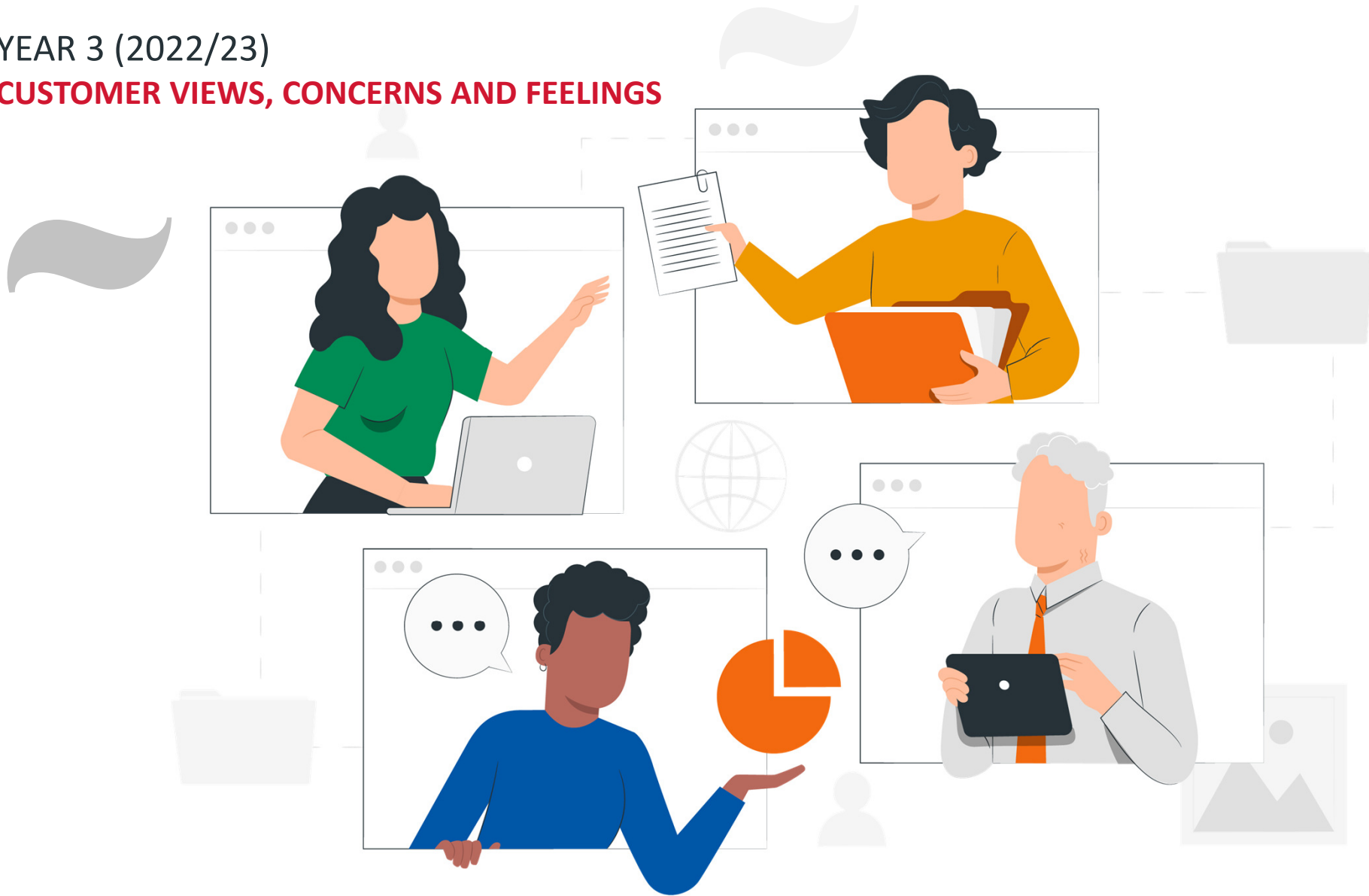
Answers related to pollution were mentioned at 5 questions...



- Q18:** Please think about the services you receive from South Staffs Water/Cambridge Water and then tell us the one thing you really want them to focus on doing. What’s your number one priority?
- Q19:** We also want to find out what else is important to customers, so now imagine that they have met your number one priority, or have plans to do so shortly. What’s your next priority?
- Q35:** To help us understand your choices, please tell us why you selected [] most important attribute selected at [] as the most important area for South Staffs Water/Cambridge Water to focus one?
- Q36:** Was there anything in the information you read about that influenced each of your choices?
- Q29:** Please tell us what other area(s) do you think South Staffs Water/ Cambridge Water should focus on?

YEAR 3 (2022/23)

CUSTOMER VIEWS, CONCERNS AND FEELINGS

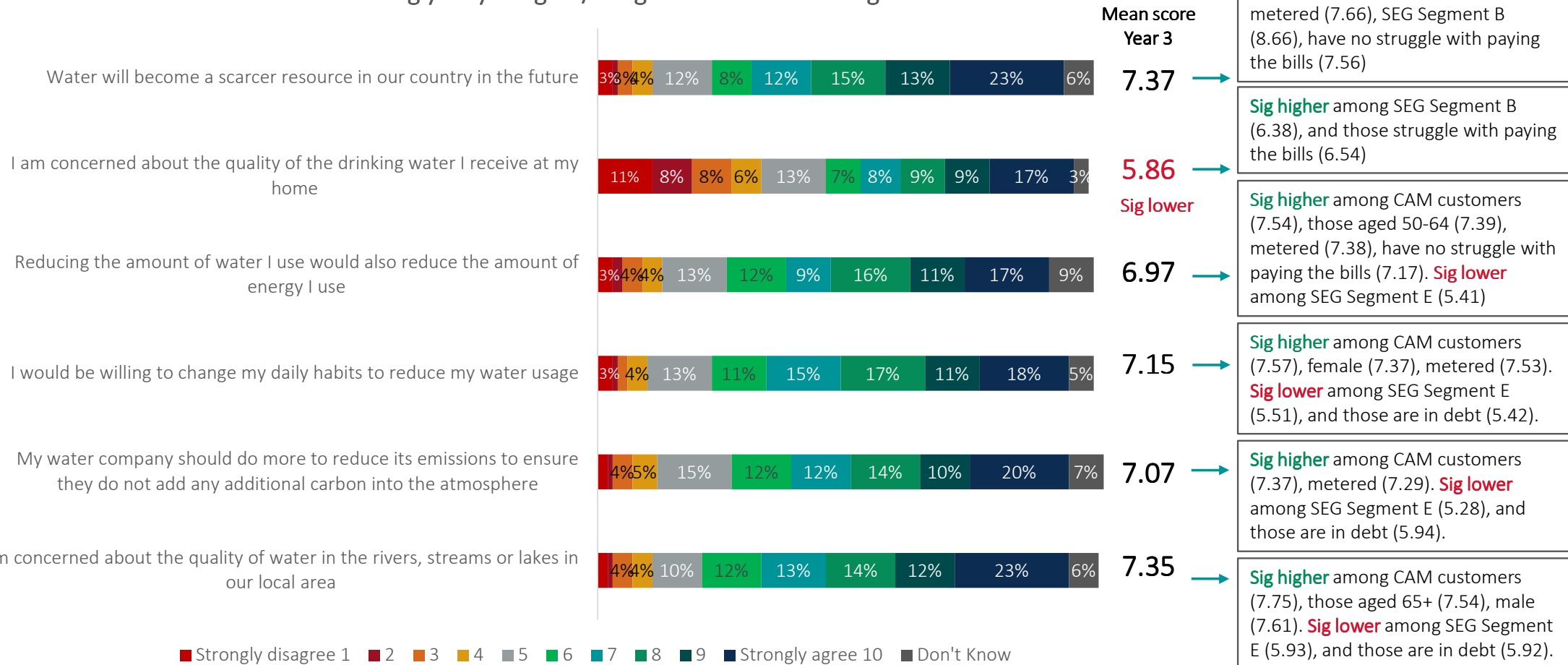


Customer views

Across all statements, *concern about the quality of the drinking water* has the significantly lower mean score.

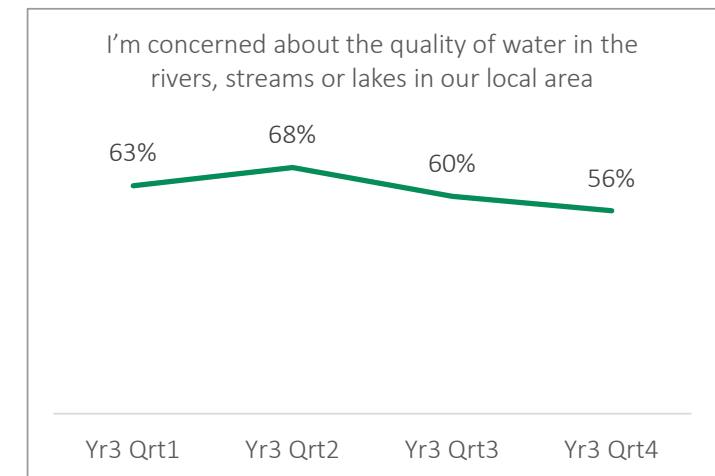
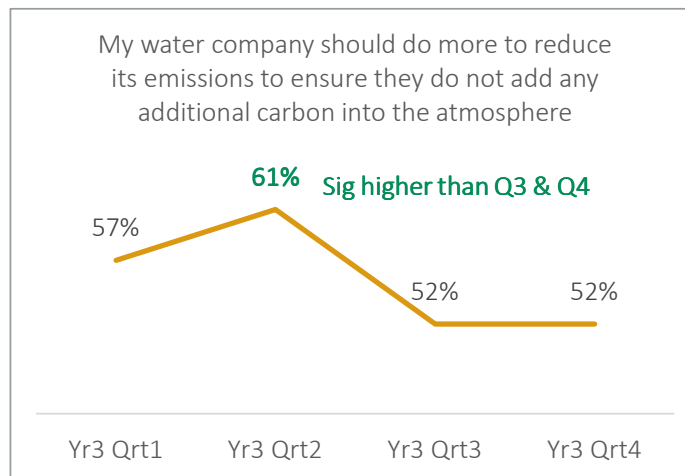
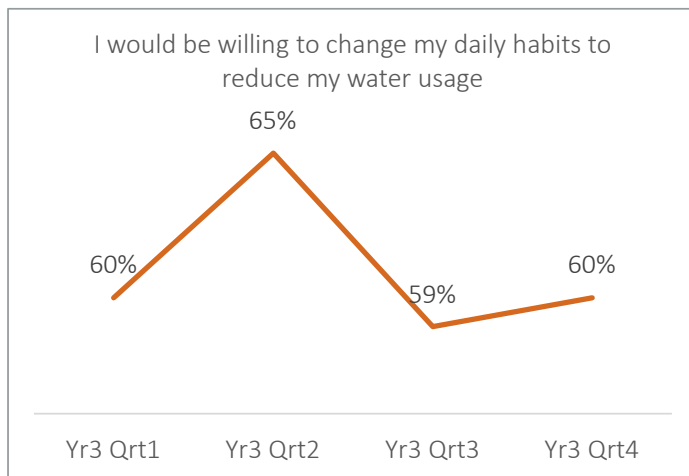
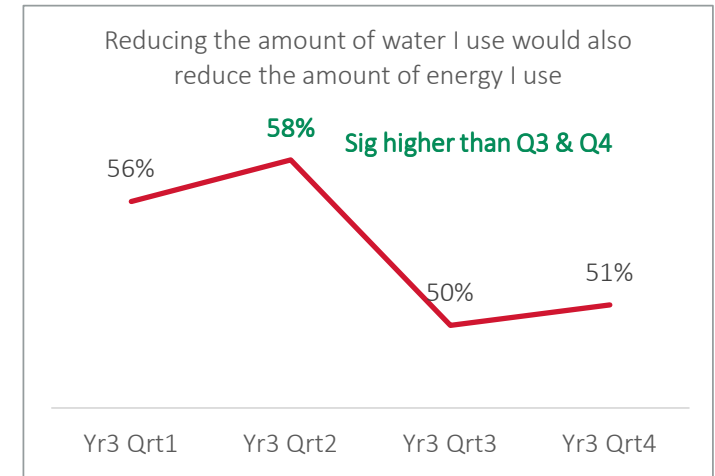
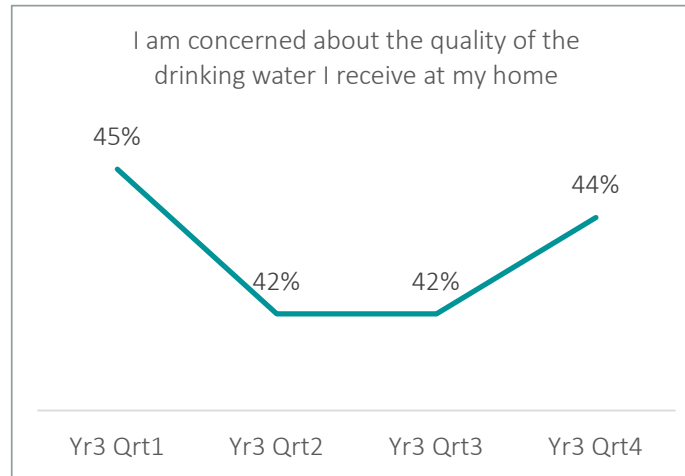
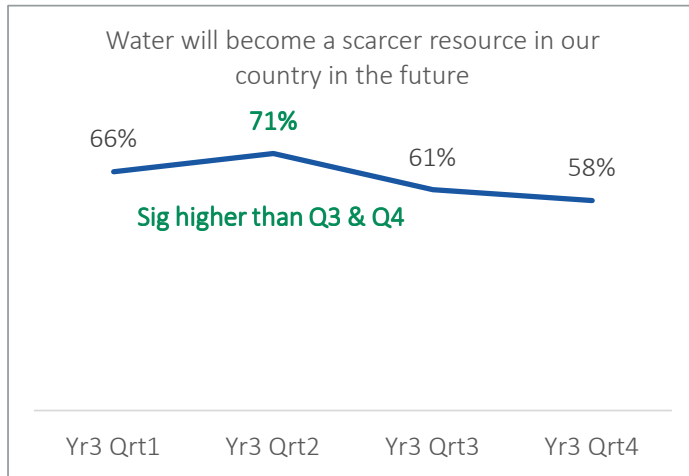
Statements with highest agreement = *future scarcity of water / quality of rivers, streams, etc*

How strongly do you agree/disagree with the following:



Q49a.How strongly do you agree/disagree with the following:

How customer views have changed during the year



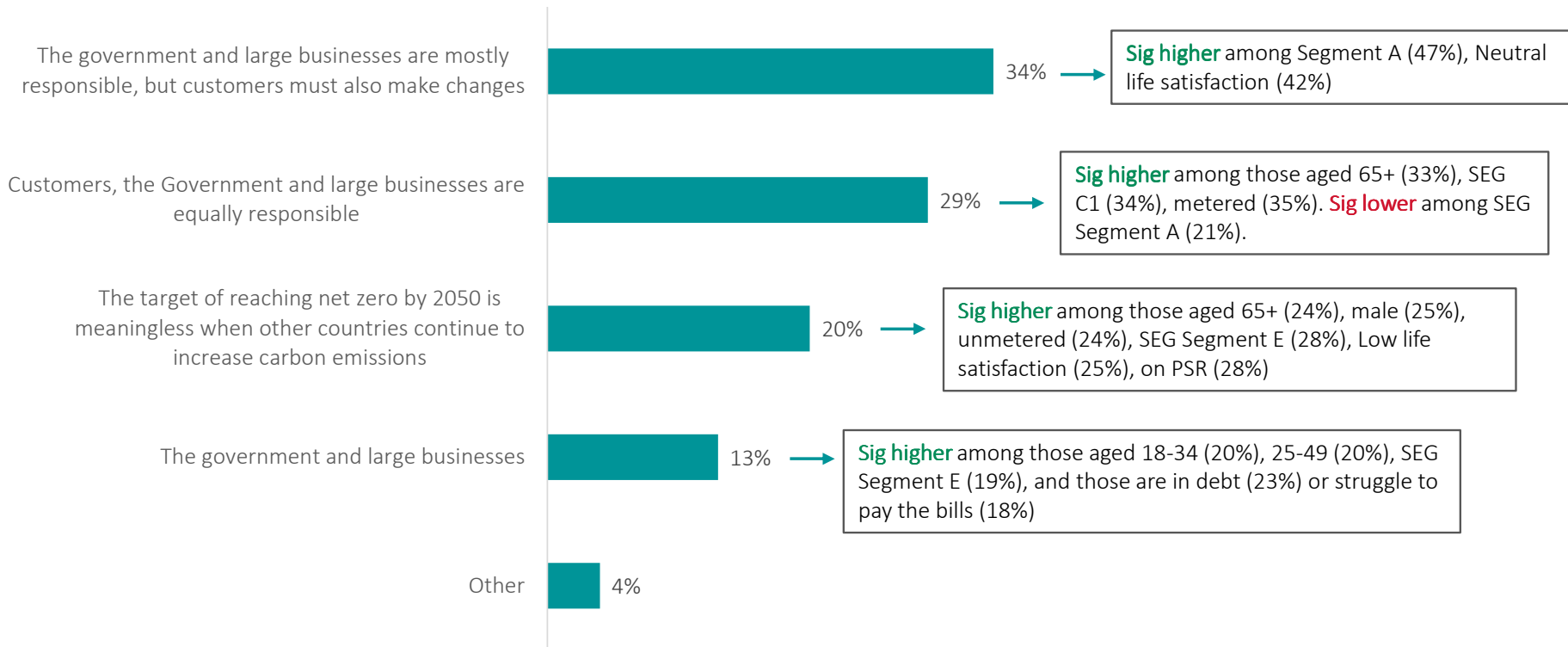
Q49a. How strongly do you agree/disagree with the following:

Who should be responsible for reaching Net Zero by 2050

More than one third of customers agreed that the responsibility for reaching Net Zero by 2050 should be taken mostly by the government and large businesses, but customers must also make changes.

Which of the following statements most closely applies to your views on who should be responsible for reaching Net Zero by 2050

*There were no significant changes during the year



Q49b. Which of the following statements most closely applies to your views on who should be responsible for reaching Net Zero by 2050:

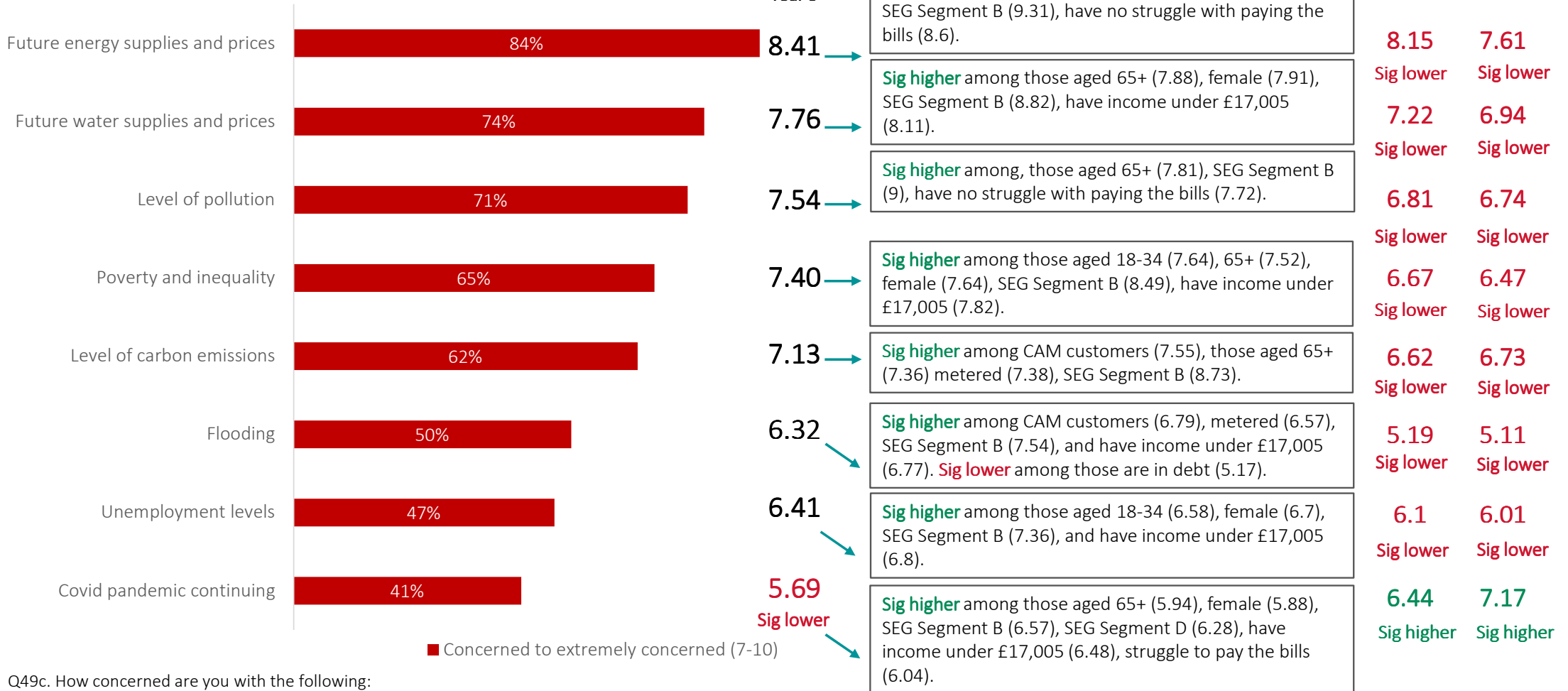
Customer concerns

In year 3, customers seem to be concerned least about *Covid pandemic* continuing. The mean score of this metric this year was significantly lower than its in Theme 1 & 3, and MCDA 2022 studies, whereas all other metrics experienced a significant increase. Across three surveys, *future energy supplies and prices* remain the biggest concern.

How concerned are you with the following:

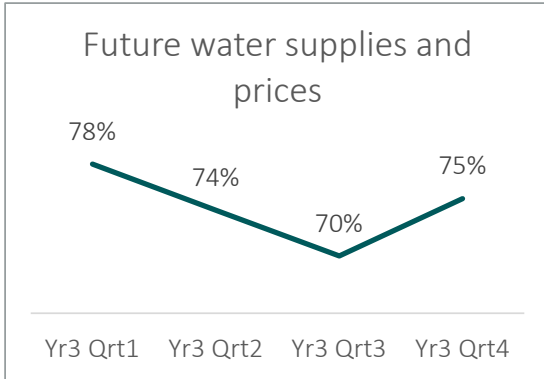
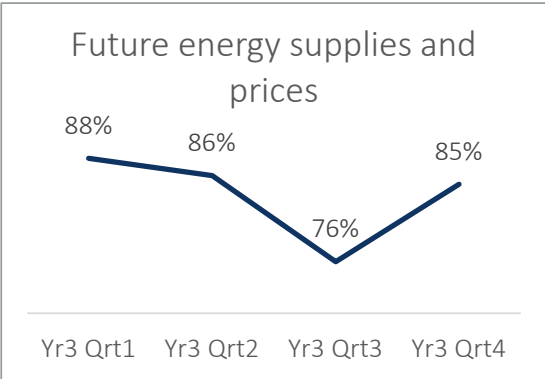
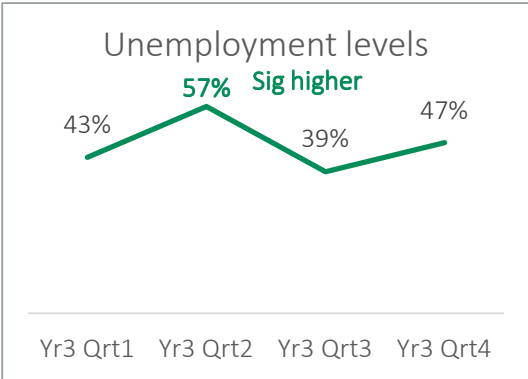
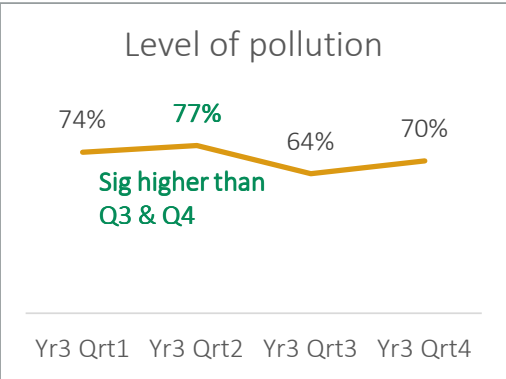
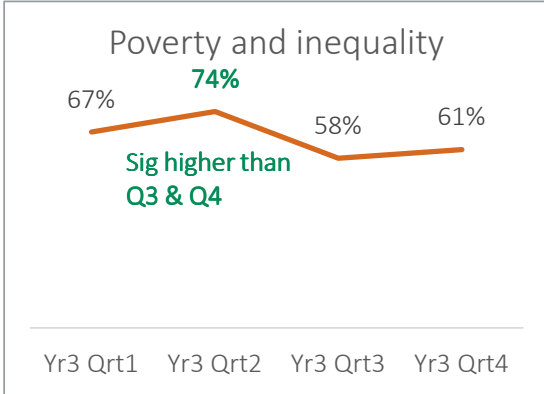
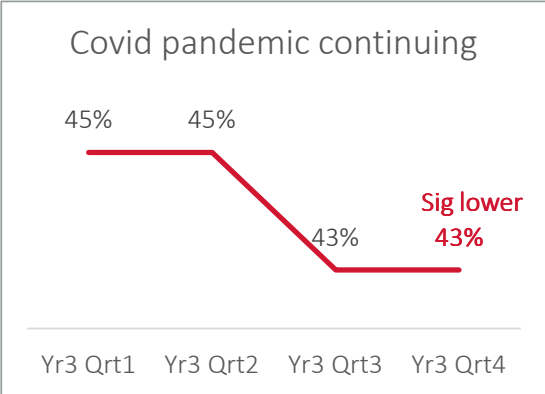
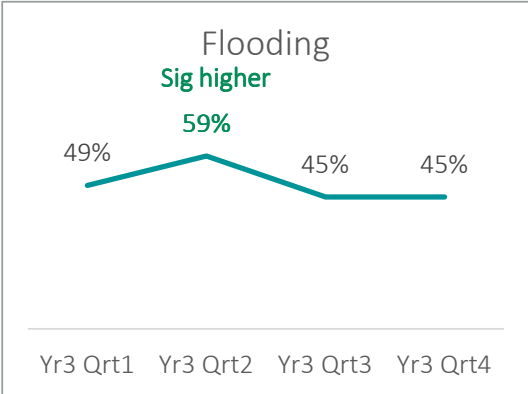
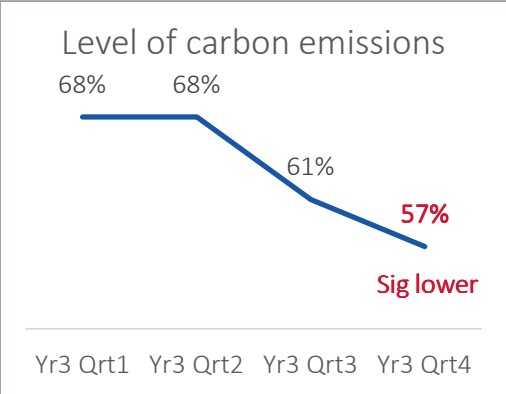
Mean score
Year 3

Theme 1&3
(Mar 2022) MCDA
(Feb 2022)



Q49c. How concerned are you with the following:

How customer concerns have changed during the year



Q49c. How concerned are you with the following:

How customers are feeling

The top 3 feelings were negative feelings (*Worried, Tired, and Stressed*). These emotions were mostly felt by those have lower income, are struggling to pay the bills, in debt or on PSR, and have low life satisfaction or neutral.



Positive feelings

Happy

Sig higher among those aged 18-34 (33%), Higher life satisfaction (31%)

Energetic

Sig higher among those aged 18-34 (8%), male (7%), SEG AB (11%), metered (7%), £52,001+ (13%), maybe on PSR (15%), Higher life satisfaction (8%)

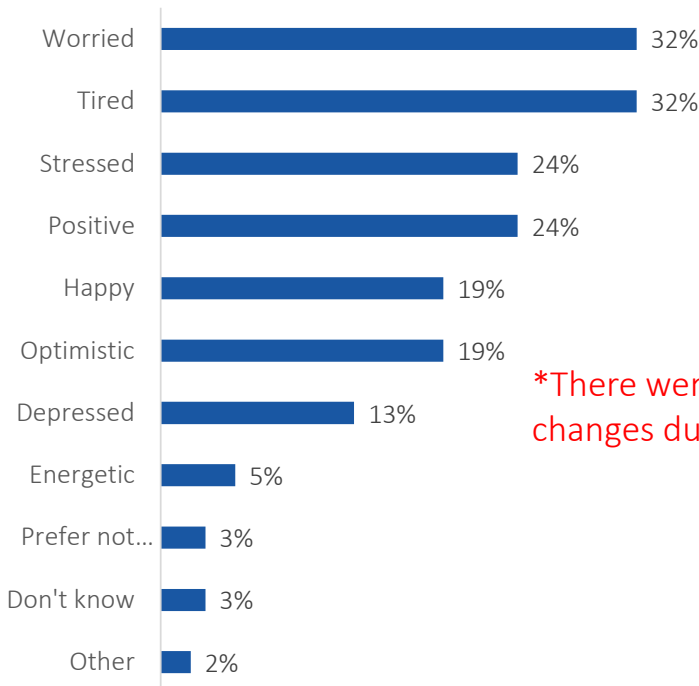
Positive

Sig higher among CAM customers (31%), SEG AB (35%), C1 (25%), C2 (28%), metered (28%), SEG Segment D (36%), have no struggle to pay the bills (28%), have income £52,001+ (40%), Higher life satisfaction (36%).

Optimistic

Sig higher among those aged 50-64 (28%), male (22%), SEG AB (25%), metered (20%), have income from £37,501 - £52,000 (27%), £52,001+ (29%), Higher life satisfaction (25%). **Sig lower** among those are in debt (5%).

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



Negative feelings

Depressed

Sig higher among SEG DE (23%), those are in debt (26%), and have income under £17,005 (21%), Low life satisfaction (30%)

Tired

Sig higher among those aged 18-34 (40%), female (38%), SEG DE (40%), unmetered (37%), struggling to pay the bills (39%), Low life satisfaction (42%) and Neutral (48%).

*There were no significant changes during the year

Worried

Sig higher among female (36%), those have income under £17,005 (44%), £23,001 - £37,500 (33%), Low life satisfaction (43%) and Neutral (43%).

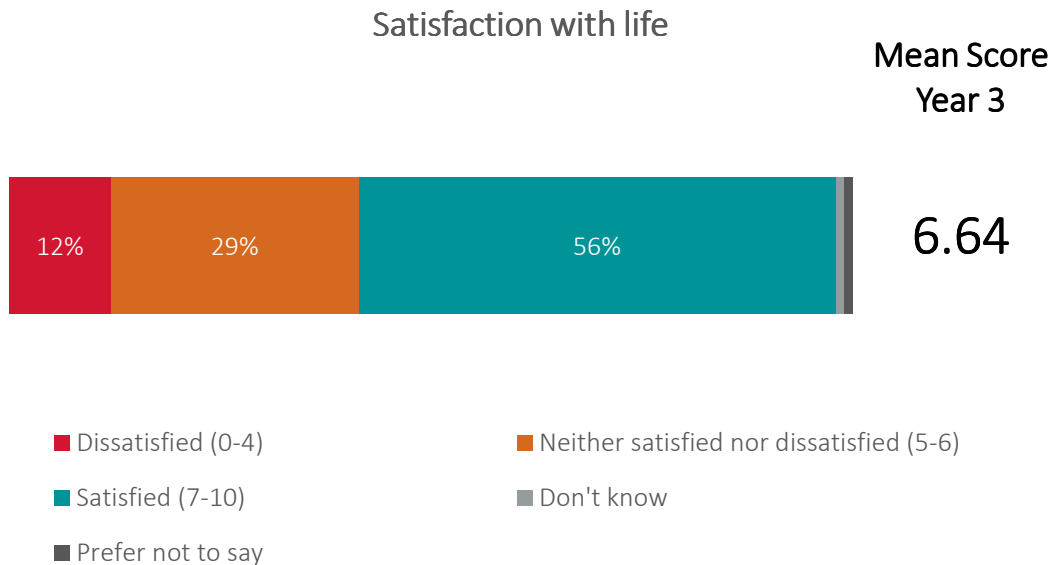
Stressed

Sig higher among those aged 18-34 (34%), 35-49 (30%), female (30%), unmetered (28%), struggling to pay the bills (39%), in debt (37%), have income under £17,005 (29%), those on PSR (23%), Low life satisfaction (36%) and Neutral (31%).

Q40d. Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

How satisfied are customers with their life these days

More than a half of customers satisfied with their life these days. This proportion was significantly higher among CAM customers, those who have higher income, have no struggle to pay the bills, have water meter, not on PSR, and show more positive feelings.



Higher satisfaction (Sig higher mean score)

- CAM customers (7.01)
- Metered (6.94)
- Not on PSR (6.76)
- Have no struggle to pay the bills (6.93)
- Positive feelings (7.88)



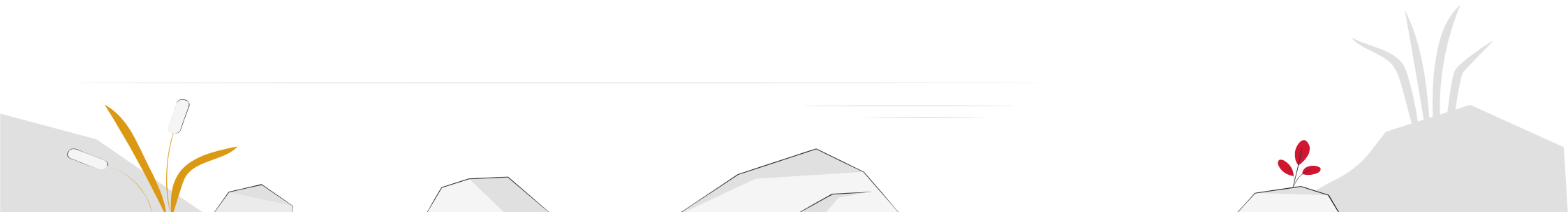
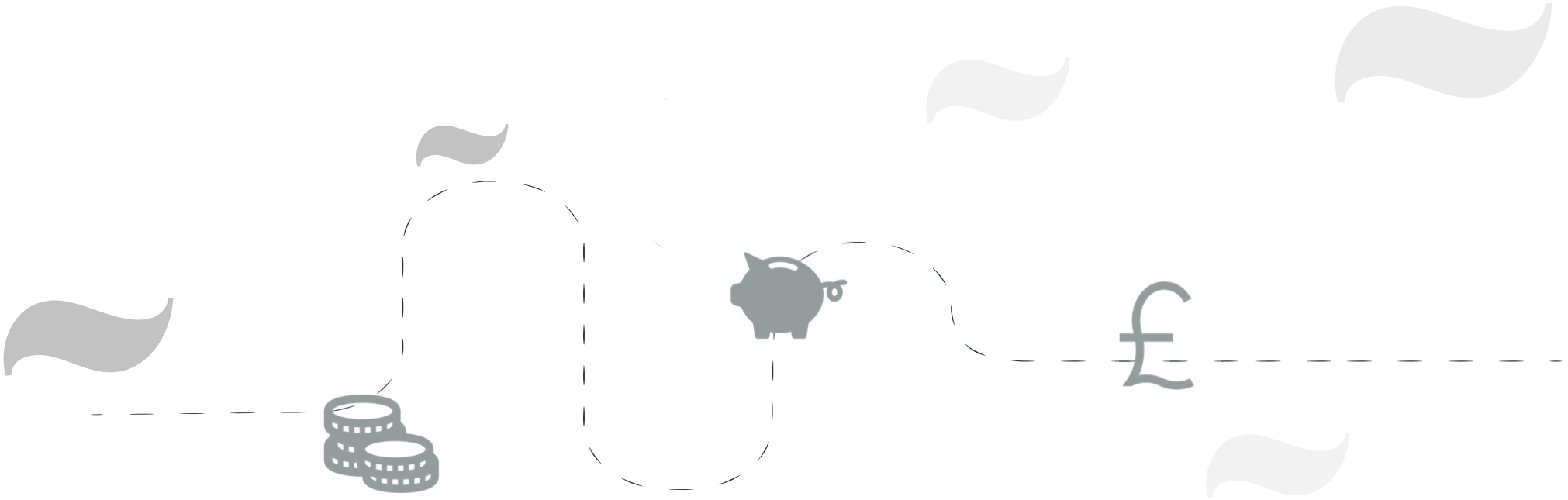
Lower satisfaction (Sig lower mean score)

- SEG DE (5.91)
- Segment E(5.99)
- Have income under £17,005 (6.01)

*There were no significant changes during the year

FINANCIAL CONCERNS

IMPACT OF THE COST-OF-LIVING CRISIS



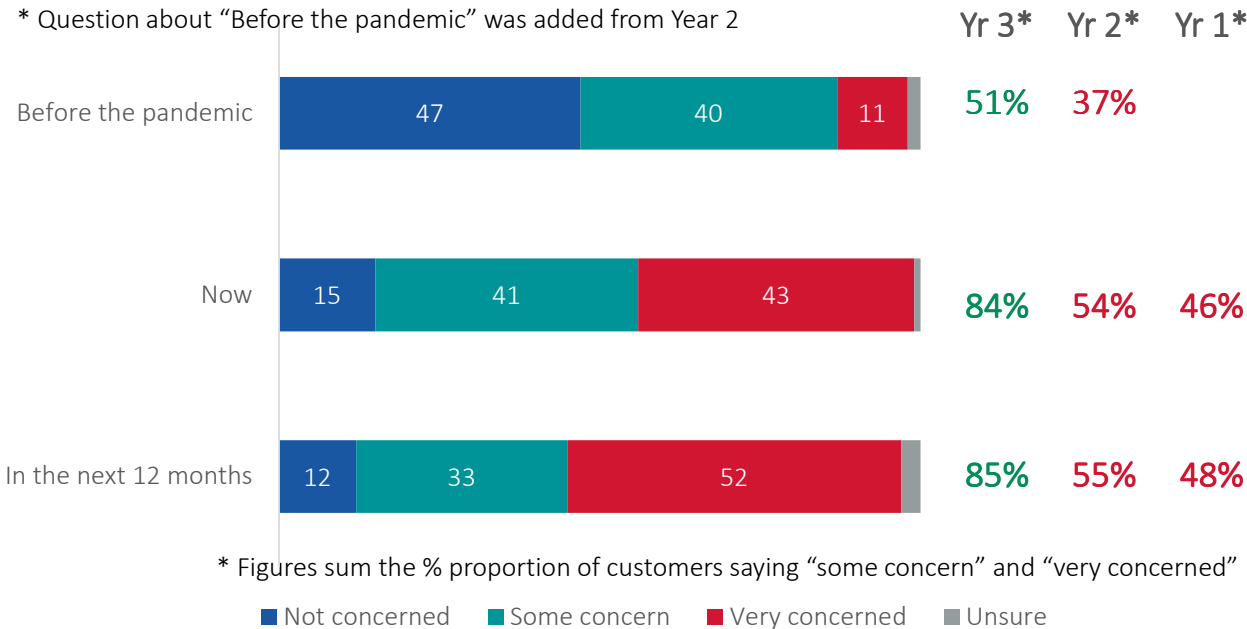
CONCERNS ABOUT HOUSEHOLD BILLS

BEFORE THE PANDEMIC, NOW AND IN THE NEXT 12 MONTHS

Before the pandemic, the concerns about household bill were significantly lower than after the pandemic. When compared to year 1 and year 2, a significantly higher proportion of customers in Y3 reported concerns with paying their household bills (against the backdrop of spiraling inflation, cost of living crisis, etc). This applied to both now and when thinking about the next 12 months.

Do you have any concerns about your ability to pay any household bills now, or in the future?

* Question about "Before the pandemic" was added from Year 2

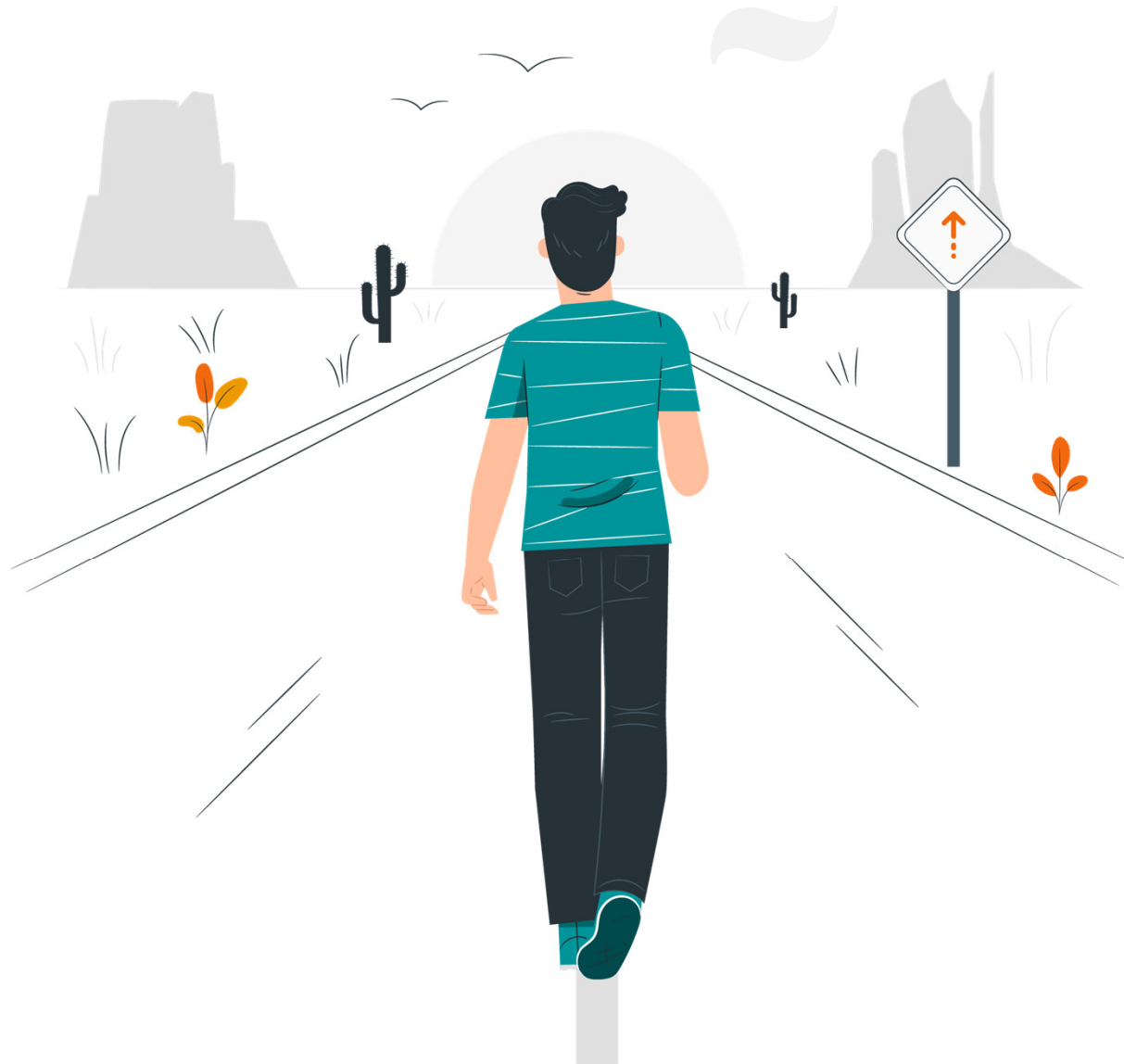


Significant higher:

- Not concerned about ability to pay household bills **before the pandemic:** SEG AB (56%) and C1 (54%), Segment A (54%), income £17,005 - £23,000 (48%), £23,001 - £37,500 (55%), £37,501 - £52,000 (55%), £52,001+ (65%).
- Some concern about ability to pay household bills **before the pandemic:** SEG C2 (44%), DE (47%), Under £17,005 (52%)
- Very concerned about ability to pay household bills **before the pandemic:** male (13%), SEG DE (15%), Under £17,005 (16%).
- Not concerned about ability to pay household bills **now:** CAM (22%), 65+ (19%), male (20%), SEG AB (21%), C1 (16%) and C2 (16%), metered (18%), income £52,001+ (32%).
- Very concerned about ability to pay household bills **now:** SSW (44%), female (49%), SEG DE (53%), under £17,005 (57%).
- Not concerned about ability to pay household bills **in next 12 months:** CAM (18%), 65+ (15%), Male (16%), SEG AB (19%), metered (16%), Some concern about ability to pay household bills **in next 12 months:** male (38%), income £52,001+ (25%).
- Very concerned about ability to pay household bills **in next 12 months:** SSW(54%), 18-34 yrs (59%), female (59%), SEG DE (60%), income under £17,005 (65%)

Q47. Do you have any concerns about your ability to pay any household bills now, or in the future? Please also tell us whether you had concerns about your ability to pay any household bills before the pandemic and the rise in the cost of living.

SUMMARY AND **WAY FORWARD**



SUMMARY



WHAT'S HAPPENING IN THE LAST 12 MONTHS THAT IS IMPACTING ON PRIORITIES

- Energy price rises – Cost-of-living crisis
- Cambridge failure around “forever chemicals” (PFAS) in its water
- Hosepipe bans in some areas of UK due to heatwave
- SSW and CAM’s customer data breach
- Water companies’ environmental responsibility under the microscope



OVERALL SATISFACTION, TRUST, AND VFM

The overall satisfaction, level of trust and satisfaction with value for money **have decreased** significantly compared to Year 2

Overall satisfaction

7.57/10

(Sig lower than Year 1 and Year 2)

Trust

7.93/10

(Sig lower than Year 2)

Value for money

3.84/5

(Sig lower than Year 2)



HOW CUSTOMERS ARE FEELING

Top 3 feelings were negative ones:

Worried – Tired - Stressed

Biggest concern is rising energy prices

These emotions were mostly felt by those:

- Who have lower household income
- Are struggling to pay the bills, in debt
- On the Priority Services Register (PSR)
- Have low life satisfaction or neutral.



=> Negative feelings and low life satisfaction can be an effect of the cost-of-living crisis



CUSTOMER VIEWS

A majority of customers agreed that **Water will become a scarer resource in our country in the future.**

35% are very concerned about the quality of the water in rivers and streams.



HOW SATISFIED ARE CUSTOMERS WITH THEIR LIFE THESE DAYS

Just more than half of customers are satisfied with their life these days (56%)

Sig higher satisfaction among:

- CAM customers
- Those with higher income
- Have no struggle to pay the bills
- Have water meters, are not on PSR
- Show more positive feelings.

Sig lower satisfaction among those:

- Have lower household income
- Are struggling to pay the bills, in debt
- On PSR



WHO SHOULD BE RESPONSIBLE FOR REACHING NET ZERO BY 2050

More than one third of customers agreed that the responsibility for reaching Net Zero by 2050 should be **taken mostly by the government and large businesses, but customers must also make changes.** 29% say everyone is equally responsible 56

SUMMARY



CONCERNS ABOUT HOUSEHOLD BILLS

The concerns about household bill were **significantly higher** after the pandemic.

When compared to year 1 and year 2, a **significantly higher proportion of customers in Year 3** reported concerns with paying their household bills. This applied to both now and when thinking about the next 12 months – with **52% very concerned**

=> This is relatively consistent with the findings from qualitative work, which shows that optimism when moving out of pandemic was short lived and has been replaced by significant cost of living concerns!



OTHER CUSTOMER CONCERNS

In year 3, customers seem to be **concerned least about Covid pandemic continuing**, whereas all other metrics of concerns experienced a significant increase. Concerns fell each quarters
Future energy supplies and prices remain the biggest concern.



Energy and water bills going up, poverty/inequality

Energy price: Bill shock for millions as rises hit

1 April 2022 · Comments



South Staffordshire Water says it was target of cyber attack as criminals bungle extortion attempt

The parent company for Cambridge Water and South Staffs Water stresses it is still supplying safe water for customers.



Alexander Martin
Technology reporter @AlexMartin



NEW CONCERNS

In year 3, due to the customer data breach in Summer 2022, customers have raised new concerns over SSC's **data security**, which was not included in the tracker.

Serious data breach affecting financial information of South Staffs Water and Cambridge Water customers

NEWS

Home | Cost of Living | War in Ukraine | Climate | UK | World | Business | Politics | Culture | Tech

England | Local News | Regions | Stoke & Staffordshire

South Staffs Water reveals data hack

30 November 2022



SUMMARY



TOP UNINFORMED PRIORITIES

1. Water quality - clean/safe/drinkable water
2. Reduce prices/lower bills
3. Reliable water supply
4. Maintain good level of service – satisfied etc
5. Prevent leaks/wastage
6. Speedy repair of leaks



TOP INFORMED PRIORITIES

1. Reliability of water quality
2. Bill affordability
3. Leakage Reduction
4. Long-term supply planning

“Super”
Hygiene

MUST-DO
by a water
company

Customer priorities have remained consistent between the qualitative and quantitative research. The overall rankings are relatively stable between Year 3 and Year 1&2.

Reliable high quality water supply, affordability, leakage and long-term planning remain the top 4 priorities mentioned spontaneously and through the prioritisation exercises.

This reflects the core hygiene priorities identified during the latest year 3 qualitative work.

SUPER-HYGIENE: Ensuring the reliability of water quality and that water bills are affordable are considered the must-do things for a water company.

=> Given the importance of those attributes to customers, SSC should continue to enhance performance in those areas, especially the “super” hygiene factors, in order to improve customer satisfaction



DIFFERENCES IN PRIORITIES BY ATTITUDES, CONCERNS, FEELINGS, AND SERVICE ISSUES

- ‘Mitigating water hardness’ ranked higher by those who had limescale issues
- Those concerned about **water scarcity / resources** gave higher priority to ‘Protecting water resources’
- Those concerned about **carbon emissions** gave higher priority to ‘Sustainable business policies’
- Those concerned about **poverty and unemployment** gave higher priority to ‘Financial bill support’

=> There is a consistency between attitudes, concerns, feelings, service issues, and priority

SUMMARY

SIGNIFICANT CHANGES IN PRIORITIES OVER TIME



Bill support ↑ Climbed 2 places compared to Year 1 and Year 2

Protecting Water Resources ↓ Fell 2 places compared to Year 2

DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER DEMOGRAPHICS



- **Bill support** ranked **higher by lower SEG groups**, low-income households and vulnerable customers
- **Water recycling** ranked **higher by higher SEG groups**

DIFFERENCES IN PRIORITIES ACROSS REGIONS



- Initiatives linked to the **environment** tend to rank **higher** among **CAM customers** (leakage; water resources; recycling; local environment; sustainability), but not significantly.
- **Affordability, accurate bills, hardness, and pressure** rank **higher** among **SSW customers**, but not significantly.











⇒ These insights complement the finding in qualitative work: *Environment is taken more seriously than ever and understood better BUT has been pushed to a longer-term issue and dwarfed by short-term, personal economic concerns.*

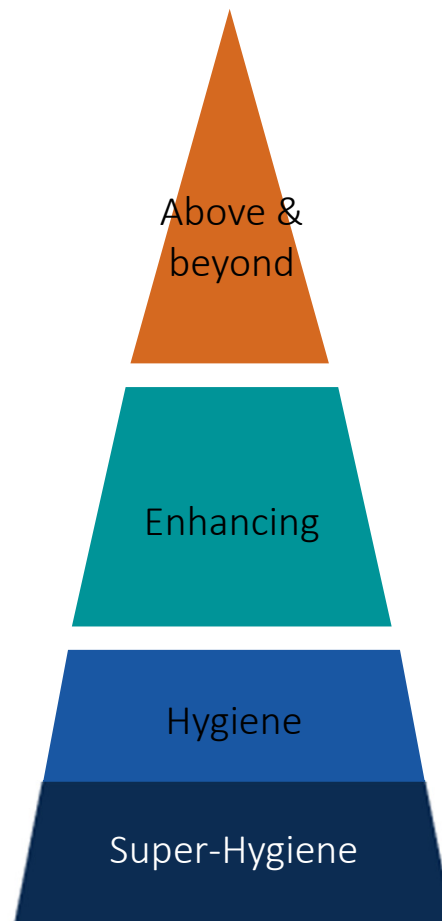
⇒ Although environmental issues have been increasingly aware by customers, people tend to focus on their situation first, especially with low SEG groups, who are struggling in the cost-of-living crisis, before they can prioritise environmental issues.











⇒ It is important for SSC to understand the differences in priority across customer segments to come up with suitable strategies.

ATTRIBUTE RANKINGS

SUMMARY OF PRIORITY RANKINGS - MIRRORS QUALITATIVE RESEARCH

	RELIABILITY OF WATER QUALITY	1
	BILL AFFORDABILITY	2
	LEAKAGE REDUCTION	3
	LONG-TERM SUPPLY PLANNING	4
	FINANCIAL BILL SUPPORT	5
	SENDING INCIDENT NOTIFICATIONS	6
	PROTECTING WATER RESOURCES	7
	SERVICE SUPPORT (VULNERABLE PSR)	8
	ACCURATE AND INFORMATIVE BILLS	9
	MITIGATING WATER HARDNESS	10



	WATER PRESSURE	11
	QUICK RESOLUTION OF ISSUES	12
	WATER SAVING INCENTIVES	13
	IMPROVE LOCAL ENVIRONMENT	14
	WATER RECYCLING / RE-USE	15
	SUSTAINABLE BUSINESS POLICES	16
	EDUCATING FUTURE CUSTOMERS	17
	WIDE RANGE OF WAYS TO CONTACT	18
	MORE REGULAR METER READINGS	19
	COMMUNITY SUPPORT - GRANTS	20

LITERATURE REVIEW

FOUR CORE RECOMMENDATIONS

1

Approach adopted in the qualitative and quantitative methods for Yr1. Quantitative research in Yr2. Qualitative and quantitative in Yr3



Use deliberative research methods in order to elicit uninformed and informed priorities



Use MaxDiff method in order to ensure priorities

3

MaxDiff design used to provide relative priorities in the quantitative study

2

Issue explored in the qualitative research SSC to review as part of PR24



Consider aggregation and equity issues



Utilise qualitative triangulation approach to combine priorities from all SSC insight sources

4

SSC undertaking insight triangulation project which this insight will inform



APPENDIX A

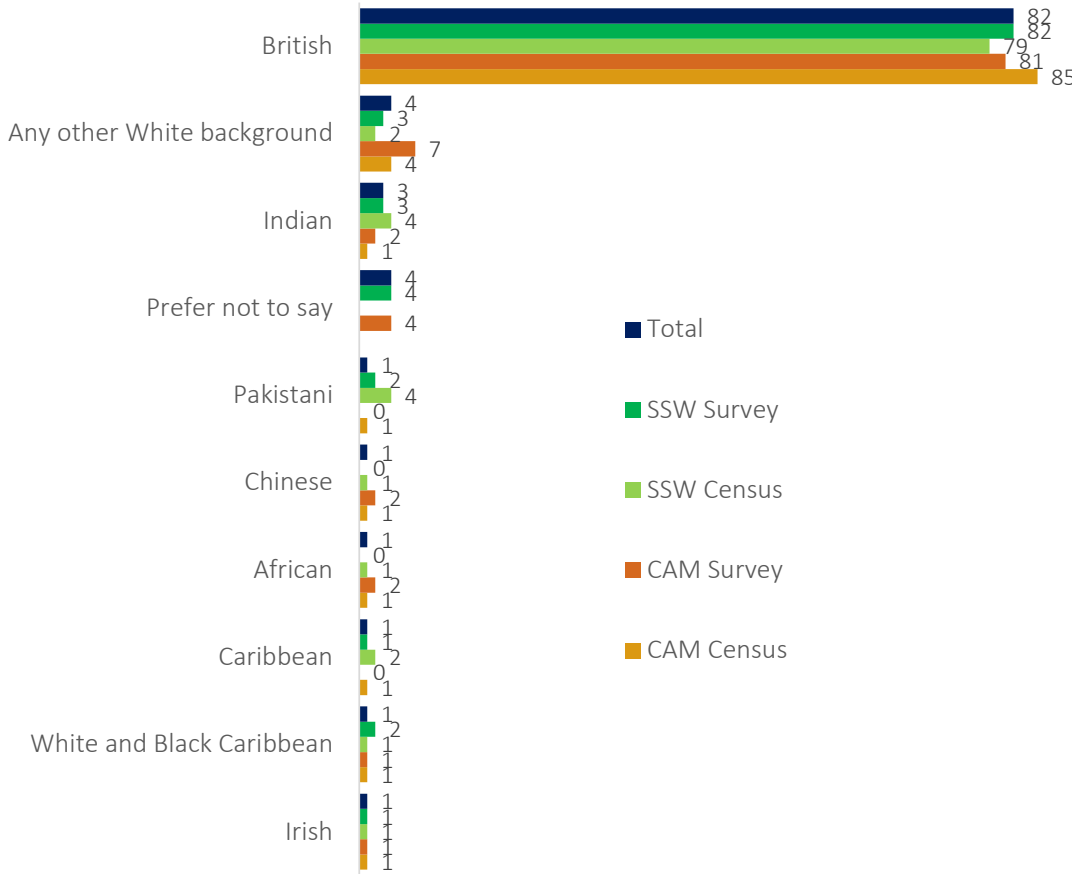
PARTICIPANT ETHNICITY & ATTITUDINAL SEGMENT



PARTICIPANT CHARACTERISTICS

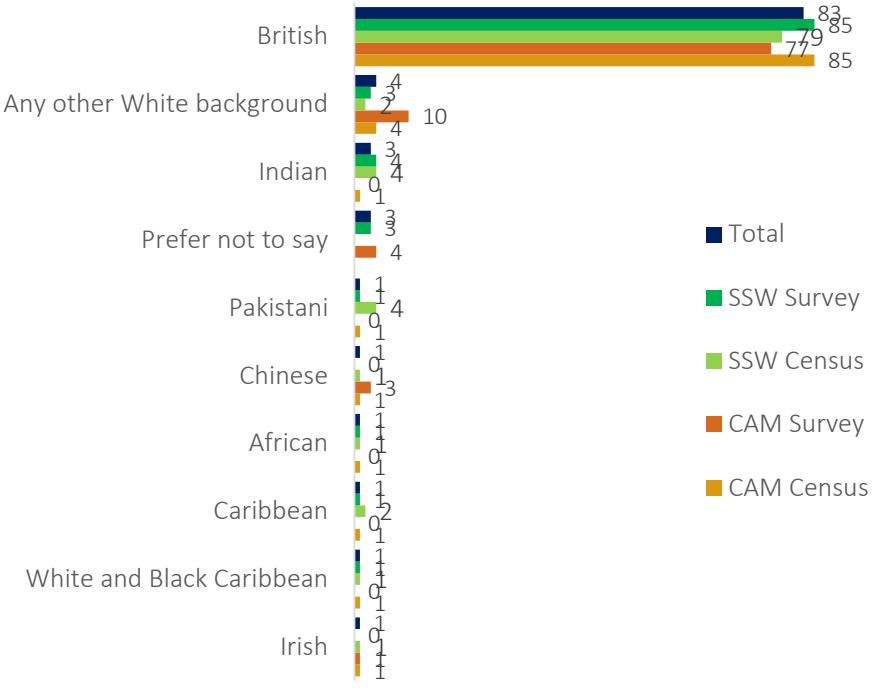
ETHNICITY

YEAR 3



The gaps between CENSUS and survey sample in year 3 were smaller than in year 2.

YEAR 2



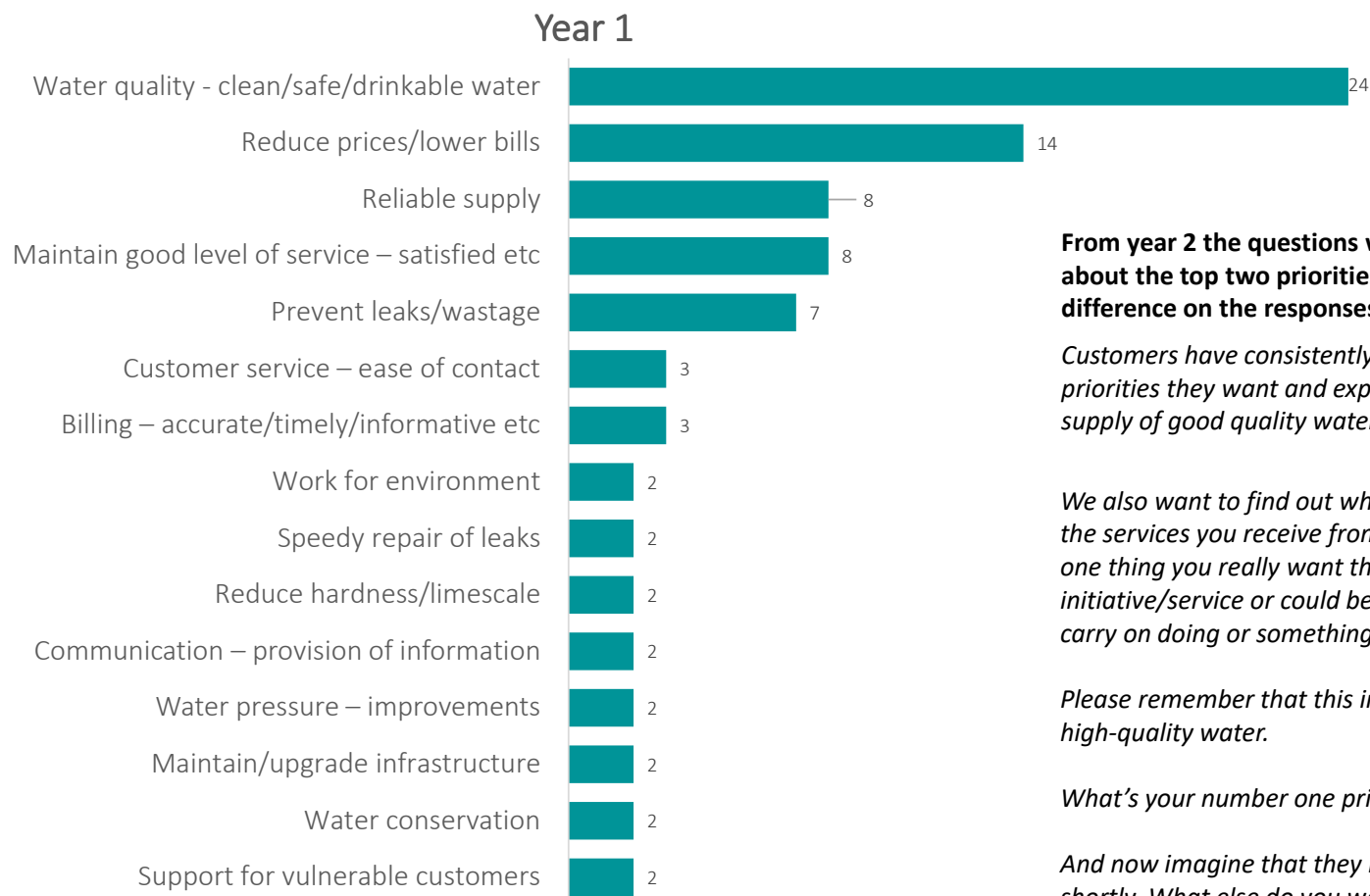
PARTICIPANT CHARACTERISTICS

ATTITUDINAL SEGMENT YEAR 3

Customer Segment %	Overview of segment	Original Segmentation PR19 - 2018	Reworked Segmentation - July 2021	Year 3 priority	Year 2 priority	Year 1 priority
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.	24	23	21	25	21
B	Highly engaged with their water usage and the wider community they live in. Expect a very high level of service from companies they use. Use technology, but prefer a personal relationship.	24	35	31	35	37
C	Often financially and time pressured. Strong preference for being on-line and using social media.	16	15	14	14	15
D	Highly engaged with using the 'latest' technology and managing their lives online. Switched on to saving water.	9	8	9	8	7
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.	27	18	24	18	20

QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON – YEAR 1



From year 2 the questions wording was changed to inform customers (see below) about the top two priorities using the wording below. However, this had no notable difference on the responses received from customers.

Customers have consistently told us through all the feedback that the top two priorities they want and expect South Staffs/Cambridge Water to deliver are a reliable supply of good quality water at an affordable price.

We also want to find out what else is important to customers, so please think about the services you receive from South Staffs Water/Cambridge Water and then tell us the one thing you really want them to focus on doing. This could be a new initiative/service or could be something they currently do well that you want them to carry on doing or something that they do now but you want them to improve on.

Please remember that this in addition to providing an affordable and reliable supply of high-quality water.

What's your number one priority

And now imagine that they have met your number one priority, or have plans to do so shortly. What else do you want them to focus on?

APPENDIX B

QUESTIONNAIRES



3410
SSC Priorities Tracker: Year 3 – Q4

Given the challenges we have all faced over the last 2 years and with 2023 set to be equally challenging, South Staffs Water/Cambridge Water appreciates you taking the time to tell them the things that are important for you and your household and the wider communities the company serves – now and in the future.

There are numerous areas where South Staffs Water/Cambridge Water could spend money to make improvements to your water supply and offer the right kind of support services. This survey should take about 15-20 minutes to complete.

ADD FOR SSC SAMPLE ONLY: We appreciate the time you'll spend giving your feedback for South Staffs Water/Cambridge Water. As a thank you we'd like to provide you with £5, which you can accept either as a One4All voucher or as a donation to charity. We'll ask you which is your preferred option at the end of the interview. You must complete the full feedback survey to be eligible to receive the £5 offer.

Q1. Any personal data collected over the course of this interview will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at www.accent-mr.com/privacy/.

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

Yes
 No **THANK AND CLOSE**

Q2. Are you the person, or one of the people, in your household who pays the water bills? **SINGLE CODE**

- I have complete responsibility for payment
- I share responsibility for payment with others in my household
- I have no responsibility, but I know it is paid by my landlord and included in my rent
- I have no responsibility for payment and I don't know who pays the bills
- Other - please tell us what
- Don't know **THANK & CLOSE**

Q3. Do you or any of your close family work in market research or for a water company (including working for South Staffs Water or Cambridge Water)? **SINGLE CODE**

Yes **THANK & CLOSE**
 No

Q10. **ASK ALL:** What's the first half of your postcode? We will only use this to check who provides your water.

South Staffs:	Cambridge Water:
B	CB
DE	
DY	
ST	PE
WS	SG

Please note that the questionnaire is regionalised to South Staffs Water or Cambridge Water where appropriate.

WV
 CV

Prefer not to answer **THANK & CLOSE**
 None of the above area codes **THANK & CLOSE**

Q11. According to our records, your water bills are sent from South Staffs Water/Cambridge Water, is this correct? **SINGLE CODE**

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

Q12. **ALLOCATE TO COMPANY:**

Cambridge Water
 South Staffs Water

Q4. Which of the following age groups do you fall into? Are you... **SINGLE CODE**

- 18 to 24
- 25 to 29
- 30 to 34
- 35 to 44
- 45 to 49
- 50 to 64
- 65 to 74
- 75 or over
- Prefer not to say

FUTURE CUSTOMER = Q4 = CODE 1 AND Q2 = CODES 3 OR 4

Q5. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

1. Higher managerial/ professional/ administrative (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
2. Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director of small organisation, middle manager in large organisation, principle officer in civil service/local government etc.)
3. Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
4. Skilled manual worker (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
5. Semi or unskilled manual worker (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
6. Student
7. Unemployed or not working due to long-term sickness or being Furloughed
8. Casual worker – not in permanent employment
9. Full-time carer of other household member
10. Retired **GO TO Q6**
11. Rather not say **THANK AND CLOSE ONLY DYNATA**

Q6. **IF Error! Reference source not found.=10 (RETIRED). OTHERS GO TO 0:** Does the main income earner have a state pension, a private pension or both?

State only



APPENDIX B

QUESTIONNAIRES

Private only
Both

- Q7. **IF Q6 = PRIVATE OR BOTH. OTHERS GO TO 0:** How would you describe the main income earner's occupation before retirement?
1. Senior managerial or professional (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
 2. Intermediate managerial, administrative or professional (e.g. doctor, Solicitor, Board director of small organisation, middle manager in large organisation, principle officer in civil service / local government etc.)
 3. Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Doctor, Foreman with 25+ employees, salesperson, etc.)
 4. Manual worker (with industry qualifications) (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus / Ambulance Driver, HGV driver, pub / bar worker etc.)
 5. Manual worker (with no qualifications) (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
 6. None of these

Q7a **SEG: CODE AS FOLLOWS:**

IF Error! Reference source not found.= 1 or 2; SEG = AB
IF Error! Reference source not found.= 3; SEG = C1
IF Error! Reference source not found.= 4; SEG = C2
IF Error! Reference source not found.= 5-9; SEG = DE

IF Error! Reference source not found.= 10 and Q6= State only; SEG = DE

IF Error! Reference source not found.= 10 and Q6 = Private only OR Both and Q7 = 1 or 2; SEG = AB
IF Error! Reference source not found.= 10 and Q6 = Private only OR Both and Q7 = 3; SEG = C1
IF Error! Reference source not found.= 10 and Q6 = Private only OR Both and Q7 = 4; SEG = C2
IF Error! Reference source not found.= 10 and Q6 = Private only OR Both and Q7 = 5; SEG = DE

- Q9. Are you:
- Male
 - Female
 - Prefer to self-identify / Other
 - Prefer not to say

Q8. **DELETED QUESTION**

Q9. **DELETED QUESTION**

Q10. **DELETED QUESTION**

Q13. Do you have a water meter at your home?

Yes – I/we asked to have one installed
Yes – it was already in the property when I/we moved in
Yes – I/we had to have it fitted, but I/we didn't really want it installed
No – and I/we not interested in getting one
No – but I/we are considering getting one
No – I/we had one, but decided to opt out
Don't Know

Thanks, you're good to go

This survey is all about the services you receive from your water company, South Staffs Water/Cambridge Water. They are only responsible for the water services to your home, that's the water that comes through

your taps. They are not responsible for your sewerage services, which are provided by Severn Trent Water (IF SOUTH STAFFS CUSTOMER)/Anglian Water (IF CAMBRIDGE WATER CUSTOMER).

Remember, if you fully complete the survey, we'd like to provide you with £5 which you can accept either as a One4All voucher or as a donation to charity.

We would like start by asking you a few questions about your experiences of South Staffs Water/Cambridge Water.

- Q14. How satisfied would you say you are with the overall service provided by South Staffs Water/Cambridge Water? When giving your answer, please think about all aspects of the service they provide, from the water supply itself to the bills you receive.

0. Extremely dissatisfied
- 1.
- 2.
- 3.
- 4.
5. Neither satisfied nor dissatisfied
- 6.
- 7.
- 8.
- 9.
10. Extremely satisfied
11. Don't know

- Q15. This time, using a 10-point scale, how much do you **trust** South Staffs Water/Cambridge Water?

1. I don't trust them at all
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
10. I trust them completely
11. Don't know

- Q16. How satisfied are you with the **value for money** of the clean water services you receive?

Very dissatisfied
Fairly dissatisfied
Neither satisfied nor dissatisfied
Fairly satisfied
Very satisfied
Don't know

- Q17. Have you experienced any of the following in the last 2 to 3 years? Please tick all that apply regardless of whether you contacted your water company **MULTICODE**

Had to raise a query about your water bill

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Had to raise a query about a water meter or installing a meter
Needed to raise a customer service complaint
Discolouration of water coming out of your tap
A change to the taste and/or smell of your tap water
A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
A temporary loss of water supply - for more than one hour
A leak in the underground pipe that supplies water to your property from the mains pipe
Low water pressure
Flooding from a burst pipe
A hose pipe ban
Traffic disruption caused by water works
Other (please specify) **DO NOT ROTATE**
I haven't experienced any of these **DO NOT ROTATE**

Q17a When was the last time you contacted South Staffs Water/Cambridge Water either via telephone or any other method of contact? Other methods could include writing a letter or email, their website or mobile App, or speaking to someone face-to-face. SINGLE CODE

Within the last six months
Over a month ago, but within the last 6 months
Six to twelve months ago
Over a year ago
Have contacted them before but can't recall how long ago
Never contacted them
Don't know

Understanding what's important

Q18. Please think about the services you receive from South Staffs Water/Cambridge Water and then tell us the one thing you really want them to focus on doing. This could be a new initiative/service **or** could be something they currently do well that you want them to carry on doing **or** something that they do now but you want them to improve on.

What's your number one priority

Q19. The majority of customers have consistently told us that the top two priorities they want and expect South Staffs/Cambridge Water to deliver are a reliable supply of good quality water at an affordable price.

We also want to find out what else is important to customers, so now imagine that they have met your number one priority, or have plans to do so shortly. Beyond delivering a reliable supply of good quality water at an affordable price, which may or may not have been your number one priority, what else do you want them to focus on?

What's your next priority:

About South Staffs Water/Cambridge Water

Before we ask you some more questions, we would like to tell you more about South Staffs Water/Cambridge Water.

Please read carefully through the following information. Please note that you will be unable to move on until the information is read. But there is no maximum time so please don't feel you need to rush!

INSERT INFORMATION: one slide per screen

DP: ADD MINIMUM TIME PERIOD BEFORE 'NEXT' BUTTON APPEARS:

Screen 1: 7 seconds

Screen 2: 10 seconds

Screen 3: 10 seconds

DP: PLEASE ADD TIME STAMP HERE AND ALSO AFTER NEXT MAXDIFF SECTION

NEW PAGE

South Staffs/Cambridge Water is regulated by Ofwat and has to submit a Business Plan every five years that outlines the services it will provide, the improvements it will make to these and how much customers

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will pay for them. In its current plan, the commitments the company has made to customers are grouped into five main areas:



Overall, their performance is being closely monitored and reported over this period across 28 different areas.

NEW PAGE

We're now going to show you a series of 10 questions showing the areas that South Staffs Water/ Cambridge Water could focus on in the period 2025-2030

In each question we'll show you four different areas and we'd like you to tell us:

- which you think is the **most** important for South Staffs Water/Cambridge Water to focus on
- which you think is the **least** important for South Staffs Water/Cambridge Water to focus on. We appreciate that you might think all the options presented for each question are important, but to understand peoples' views we really need you to select the one which is **least** important compared to the other options shown.

When answering the questions, please don't try to factor in how much you would expect these initiatives to cost. At this stage, we're most interested in what you think is most important for South Staffs Water/Cambridge Water to focus on.

There's an "Ask the Expert" button available that you can click to provide more information about each of the areas. **Please make use of this help when making your choices.**

Below is an example question [INSERT MOVING GIF WITH WALK THROUGH OF DESIGN]

DP: ATTRIBUTES AS PER SP DESIGN. FOR EACH EXERCISE SHOW THE RELEVANT INTRODUCTORY TEXT FOR EACH ATTRIBUTE AND INFORMATION BUTTON TEXT AS FOLLOWS:

ATTRIBUTE DESCRIPTION: They make sure your household receives water supplies that are high quality and always safe to drink

INFO BUTTON TEXT: South Staffs Water/Cambridge Water is responsible for making sure your water has no unpleasant taste or smell or is discoloured and that there are no bacteria, viruses, chemicals or micro plastics in it. In 2021, 7.6 out of every 10,000 properties had to contact their water company about the appearance and/or taste and smell of their water. This is an improvement on the figure of 9.8 of every 10,000 properties recorded the year before.

The company could also focus more on removing any lead pipe from the 1 in 3 properties that have a supply pipe made of this material. A harmless additive is added to the water supply to ensure the lead pipe poses no risk to health and there is also a national lead replacement strategy in place to protect higher risk properties like care homes and schools.

ATTRIBUTE DESCRIPTION: They make sure your household is not impacted by the effects of hard water - for example, limescale in your appliances and taps, or particles/scum floating in the water when you make a drink

INFO BUTTON TEXT: The area you live in has harder water than average when compared with other parts of England and Wales. South Staffs Water/Cambridge Water offers advice on how customers can prevent limescale build-up in their appliances and fittings (like showerheads and taps) and what they can do to soften their own water supply. But the company does not currently offer financial support for those customers who buy their own water filters or softening systems. The company has no plans at this time to build a water softening treatment works to soften the whole water supply.

The company's independent surveys show that during the year 2021/22 17%/47% of customers in the South Staffs Water/ Cambridge Water region are dissatisfied with the hardness of their water, a slight increase/decrease on the figure from last year.

ATTRIBUTE DESCRIPTION: They have detailed plans in place to make sure water always comes out of the tap – today, tomorrow and in the future

INFO BUTTON TEXT: Your water company has detailed plans to make sure you have a constant supply of water, taking into account the growing pressures of a potentially drier climate and population growth.

Although most customers will experience no interruption to their water supply in a typical year your water company counts the number of properties that are affected and the length of time they were without water. Using this approach, in 2021/22, the average supply interruption time across all customers works out as 3 minutes 15 seconds, which is slightly worse than the figure of 4 minutes 33 seconds the year before.

ATTRIBUTE DESCRIPTION: The water always comes out of the taps at a pressure that does not impact on the way you use water at home – e.g. taking a shower/bath, using a hose

INFO BUTTON TEXT: Your water company has to ensure a minimum level of water pressure to every customer's property, or it has to pay compensation. The water pressure can be too high, for example if a customer's supply is near a booster station or it can be too low, for example if it is at the top of a hill or a long way from a booster station. This can lead to taps and showers running too fast or slowly.

An independent survey in 2021/22 shows that [SSW] 8 [CAM] 10 of every 100 customers said that they are dissatisfied with the pressure of their water supply, a slight increase from the figure of 7 of every 100 the year before.

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ATTRIBUTE DESCRIPTION: They quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks

INFO BUTTON TEXT: All water pipes leak over time and it is up to South Staffs Water/Cambridge Water to prioritise the leaks they find, or are reported by customers, as quickly as possible. Your water company is investing in new technology to identify sections of pipe that need replacing before they burst or start to leak, but it could invest more to reduce leakage levels faster

Currently, around 70% of all leakage occurs in pipes for which South Staffs Water/Cambridge Water is responsible for maintaining; 30% come from leaks in pipes on customers' premises.

Currently 21% #SOUTH STAFFS WATER# 15% #CAMBRIDGE WATER# of treated water is lost to leaks each day. This is slightly higher #SOUTH STAFFS WATER# better #CAMBRIDGE WATER# than the national industry average, which is just under 20%.

ATTRIBUTE DESCRIPTION: They will always tell you if your water supply is to be cut off temporarily and/or if there is an issue with the quality of your water

INFO BUTTON TEXT: When the water supply is interrupted unexpectedly or there is a short, planned interruption to allow essential work to take place, South Staffs Water/Cambridge Water sends messages to customers through a number of different channels, including text, mobile app, website and social media updates and recorded messages on company phone lines.

Your water company currently holds mobile numbers for six out of 10 of its customers and the app is used to receive alerts and updates by over 46,000 of the 567,000 #SOUTH STAFFS WATER# by over 9,500 of the 140,000 #CAMBRIDGE WATER# properties they serve.

ATTRIBUTE DESCRIPTION: They have accurate bills that are clear making it easy to understand what you are being charged for, how much you owe and what action you need to take next.

INFO BUTTON TEXT: Regular investment in this area is needed to make it easy for customers to understand what services they are being charged and how the charges are worked out when they receive their water bills. There is also the opportunity to include more information about how the money customers pay is spent by the company to improve the service in the future. For customers on a water meter, it is also important to clearly show how their water use is changing over time.

ATTRIBUTE DESCRIPTION: They are easy to deal with by quickly and effectively resolving any queries you have about your water services

INFO BUTTON TEXT: Regular investment in this area is needed to make sure customers can always contact South Staffs Water/Cambridge Water easily through a number of different channels, from phone to online services and that any queries or problems are responded to quickly and with the minimum of effort for customers. Then could make even more investment into staff training and take on more apprentices to ensure the best possible service is offered to customers, from their customer service centre staff to the engineers who visit properties to fix any issues customers have with their water supply.

Currently, in an independent survey, just under 6 out of 10 customers said that the company is easy to deal with.

ATTRIBUTE DESCRIPTION: They provide a wide range of ways to contact and interact with them so that any customer can easily access their services and support – e.g. face-to-face, phone, website, webchat, email, APP, letter

Regular investment is needed to make sure that online services (such as the website) work effectively on all computer and mobile devices and that all customers, including those with special needs or who can't use online services, can contact the company using the best method for them. The range of options currently available includes phone, letter, email, mobile app, webchat, #SOUTH STAFFS WATER# in person at the Community Hub in Wednesbury and #ALL# (COVID safe) home visits.

There are new approaches the company could look to offer to provide more choices for customers when contacting it. One example is offering a live video call service so that a customer, for example, could show one of the company's engineers a leaking pipe and then ask for advice. They could add new features to the MyAccount service. At the moment customers can use this to manage their bills, payments, meter readings and account details online. New features might include facilities to book appointments or showing charts analysing your water usage".

ATTRIBUTE DESCRIPTION: They provide customers with meter readings on a regular basis (at least monthly) to allow them to monitor and better understand how much water they use

INFO BUTTON TEXT: Currently 45% (South Staffs Water)/75% (Cambridge Water) of customers have a water meter installed. Water meters are currently read once a year #SOUTH STAFFS WATER# twice a year #CAMBRIDGE WATER#. To offer more benefits for customers who already have a meter and to encourage those who don't have a meter to get one installed, South Staffs Water/Cambridge Water could invest in services that provide customers with meter read information through an online website or mobile app. This could include comparisons with other similar households and advice to help customers understand and manage their water use.

The company is also exploring different options to provide more frequent meter readings, such as using bin lorries to automatically read meters when they pass by customers' houses.

ATTRIBUTE DESCRIPTION: They provide incentives to customers who use less water – for example, tariffs that are lower if you use less water over a 12 month period

INFO BUTTON TEXT: There are options that South Staffs Water/Cambridge Water could offer to customers, such as:

- awarding customers points for every litre of water they save over a 12-month period; at the end of the year, all the points would be converted into money and used to fund local community projects.
- offering the best prices to customers who use less than 100 litres of water per person a day over the course of any year. During 2021/22, the average was 149 litres per person a day (down from 152 the year before) #SOUTH STAFFS WATER# 141 litres per person a day (down from 152 the year before) #CAMBRIDGE WATER#. However, the amount of water the average person uses each day has not returned to the level (128) from 2019/20. This is due to the changes caused by the pandemic, such as people continuing to work from home.

Customers would need to have a water meter to benefit from initiatives such as these.

ATTRIBUTE DESCRIPTION: They focus on becoming a sustainable business that reduces the environmental impact of its operations for example, reducing carbon emissions, waste that goes to landfill and single use plastics

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INFO BUTTON TEXT: South Staffs Water/Cambridge Water will continue to work towards removing all single-use plastics from their day-to-day operations and to minimise the amount of waste going to landfill. The company is aiming to be a carbon neutral business by 2030, using different initiatives such as only buying and generating electricity from zero carbon sources, using electric vehicles, reducing leakage and planting more trees on the sites it manages.

ATTRIBUTE DESCRIPTION: They actively protect the environment by not taking too much water from rivers and underground water sources and working with landowners and farmers to ensure water sources are not damaged by any pollution

INFO BUTTON TEXT: **SOUTH STAFFS:** Your water supply is taken from the natural environment, which includes underground water sources (boreholes) and surface water sources (rivers and reservoirs). **CAMBRIDGE WATER:** Your water supply is taken from the natural environment, and is all from underground water sources called boreholes, many of which feed the rivers in the region. **ALL:** If leakage was reduced and everyone used less water, then the company wouldn't need to take as much from the environment. The quality of water can also be affected by the activity that takes place on the land and in the rivers that make up the catchment area.

Your water company works with landowners and farmers to minimise the impact of their activities on the quality of the water supply. One way the company does this is through the SPRING Environmental Protection Scheme, where farmers can each apply for a grant of up to £10,000 to help them farm more sustainably and reduce the amount of fertilisers and pesticides entering rivers and other water sources. The company could expand its activities in this area further.

ATTRIBUTE DESCRIPTION: They improve the environment in the areas they supply, by offering grants to support local projects that improve natural habitats – i.e. trees, plants and animals

INFO BUTTON TEXT: South Staffs Water/Cambridge Water runs an annual environmental enhancement scheme called PEBBLE. Funding of up to £10,000 is available for projects that seek to improve, restore or create habitats for nature and wildlife within the local area. The projects given funding also often have a community benefit. The company could expand its activities in this area further.

ATTRIBUTE DESCRIPTION: They pro-actively work with households and developers to adopt approaches to re-use water – i.e. rainwater harvesting and 'grey' water recycling, where less treated water is used for activities like watering the garden and flushing the toilets

INFO BUTTON TEXT: South Staffs Water/Cambridge Water could invest more in offering free devices, such as water butts, on a large scale. The company could also do more to help develop new technology, such as compost toilets with no flushes, and promote grey water recycling systems. These grey water systems collect the water you've used in your sinks, dishwashers, showers and baths, then clean it and plumb it straight back into your toilet, washing machine or outside tap. This means you would have two water supplies – you would use your 'clean' water supply for cooking, drinking and washing; and your recycled water supply for flushing toilets or in your washing machine.

If successful, these initiatives should help to reduce the average volume of water the average person uses each day to 80 litres (down from the current figure this year of 149 #SOUTH STAFFS WATER# 141 #CAMBRIDGE WATER#). Your water company is currently working with developers to make sure that at least five of every 100 new homes built each year will have access to grey water recycling systems.

ATTRIBUTE DESCRIPTION: They provide support for customers who need extra help accessing their services – for example, delivering bottled water if the water is cut off or braille bills

INFO BUTTON TEXT: If customers need some extra help because of medical, learning, physical disabilities or financial difficulties, they can join South Staffs Water's/Cambridge Water's Priority Services Register. It's free to join.

There are currently more than 58,850 customers on this register across all the areas the company serves, up from just over 39,170 the year before. The company also now offers a proactive service to over 3,000 of the most vulnerable customers to ensure they receive the right level of support.

ATTRIBUTE DESCRIPTION: They provide extra support for customers who are struggling to pay their bills – for example, discounted bills or payment breaks

INFO BUTTON TEXT: South Staffs Water/Cambridge Water offers a range of special tariffs to help customers who are on a low income or struggling to pay their water bills. These tariffs aim to make water bills more affordable and reduce water poverty. The main discounted tariff is called Assure.

There are currently over [SSW] 42,700 [CAM] 2,300 customers on the Assure tariff; they benefit from discounted water bills of 60% in the first year after applying and 40% in the second year. The company estimates that around half of households who would qualify and benefit for financial support are currently on a discounted tariff.

ATTRIBUTE DESCRIPTION: They work closely with primary, secondary schools and higher education bodies to educate young people about the value of conserving and re-using water

INFO BUTTON TEXT: South Staffs Water's/Cambridge Water's team visits primary schools to focus on educating young people on why and how they can reduce how much water they use. This is to help ensure we all use water responsibly. The company's education programme includes class workshops and assemblies; they were made available online following the COVID-19 pandemic.

Between 1 April 2021 and 31 March 2022, over 2,300 pupils from across the company's supply area took part in the educational programme. The company's target is 6,000 a year, but covid restrictions during 2021 made it challenging to engage with schools. The company could go further in this area to employ more staff to visit more primary and secondary schools.

ATTRIBUTE DESCRIPTION: They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply

INFO BUTTON TEXT: South Staffs Water/Cambridge Water currently supports and fundraises for a number of local charities, as well as for WaterAid, which works internationally. Staff also spend time working on community projects and normally do around 400 days of volunteering a year between them – that's around 1 day a year for each staff member.

The company also supports local organisations with advice on how to become a Refill point. This is a nationwide initiative which seeks to reduce plastic bottle waste and open up access to more high-quality free drinking water points for everyone to use. The company could expand its activities in this area further.

ATTRIBUTE DESCRIPTION: They keep the cost of water affordable for customers, today, tomorrow and long into the future

INFO BUTTON TEXT: Typical water bills in the South Staffs Water/Cambridge Water area are currently the fourth/third lowest out of the 19 water companies in England and Wales. 54% of the bill you pay goes to Severn Trent Water, which provides sewerage and drainage services #SOUTH STAFFS WATER# 63% of the total bill you pay goes to Anglian Water, which provides sewerage and drainage services #CAMBRIDGE WATER#.

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Shareholder dividends for South Staffs Water/Cambridge Water were 4% between 2015 and 2020; this has fallen to around 2% for the five years from 2020 to 2025.

DP: ON EACH MAXDIFF CHOICE PLEASE ADD TEXT AS FOLLOWS:

From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important

Please remember to click on the "Ask the Expert" icon if you need more information to help you make your choices

SPCHOICE1. MaxDiff1: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q35. To help us understand your choices, please tell us why you selected #insert most important attribute selected at MaxDiff1# as the most important area for South Staffs Water/Cambridge Water to focus one?

Q36. Was there anything in the information you read about that influenced each of your choices?

SPCHOICE2. MaxDiff2: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE3. MaxDiff3: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE4. MaxDiff4: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE5. MaxDiff5: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE6. MaxDiff6: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE7. MaxDiff7: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE9. MaxDiff9: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

SPCHOICE10. MaxDiff10: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q28. We've just shown you the following 20 different areas that South Staffs Water/Cambridge Water could focus on. Were there any areas that weren't included in the choices that you have read that you think South Staffs Water/ Cambridge Water should also focus on?

Yes
No **GO TO 0**

Q29. Please tell us what other area(s) do you think South Staffs Water/ Cambridge Water should focus on?

Q48. How strongly do you agree or disagree with how the following statements apply to you and your life generally:

1=STRONGLY DISAGREE/10=STRONGLY AGREE

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

Q49. Which one of the following statements most closely applies to your use of water in your household?

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

Q49a. How strongly do you agree/disagree with the following:

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

Water will become a scarcer resource in our country in the future
I am concerned about the quality of the drinking water I receive at my home
Reducing the amount of water I use would also reduce the amount of energy I use
I would be willing to change my daily habits to reduce my water usage
My water company should do more to reduce its emissions to ensure they do not add any additional carbon into the atmosphere
I'm concerned about the quality of water in the rivers, streams or lakes in our local area

Q49b. The UK Government has pledged to deliver its emissions targets of Net Zero [INSERT INFO BUTTON – TEXT: Net zero means that a company's activities do not add any additional carbon emissions into the atmosphere] in 2050 in order to prevent significant damage to our climate. Which of the

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following statements most closely applies to your views on who should be responsible for reaching Net Zero by 2050:

The government and large businesses
 The government and large businesses are mostly responsible, but customers must also make changes
 Customers, the Government and large businesses are equally responsible
 The target of reaching net zero by 2050 is meaningless when other countries continue to increase carbon emissions
 Other: please write in as much information as possible

Q49c. How concerned are you with the following:

ROTATE

RESPONSE CODES 1=NOT AT ALL CONCERNED/10=EXTREMELY CONCERNED. INCLUDED DON'T KNOW

Level of carbon emissions
 Flooding
 Covid pandemic continuing
 Poverty and inequality
 Level of pollution – e.g. air, water
 Unemployment levels
 Future energy supplies and prices
 Future water supplies and prices

Understanding how customers are feeling

All customers are important to South Staffs Water/Cambridge Water, especially in these challenging times, so the next 5 questions will simply be about you and how you're currently feeling. As with all questions your responses will be confidential. And if you feel uncomfortable answering some or all of these questions, please feel free to tick 'Prefer not to say'

Q40d Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply.

ROTATE

Happy
 Depressed
 Stressed
 Optimistic
 Positive
 Worried
 Energetic
 Tired
 Other (please specify)
 Prefer not to say DO NOT ROTATE
 Don't know DO NOT ROTATE

Q40e Overall, how satisfied are you with your life these days? Please use a scale of 0-10, where 0 = extremely dissatisfied and 10 = extremely satisfied.

0
 1
 2 etc
 11 Don't know
 12 Prefer not to say

Q47. Many people have told us that their income has been adversely affected by the pandemic and more recently the rise in the cost of living and this means that they may struggle to pay some household bills. Do you have any concerns about your ability to pay any household bills now, or in the future? Please also tell us whether you had concerns about your ability to pay any household bills before the pandemic and the rise in the cost of living.

DP: BUILD UP EACH ROW AT A TIME AFTER THE PARTICIPANT CLICKS ON AN ANSWER

Level of concern with paying your household bills – e.g. water, electricity, insurance, phone.

	Not concerned	Some concern	Very concerned	Unsure
Before the pandemic/cost of living increases	1	2	3	
Now	1	2	3	
In the next 12 months	1	2	3	

Q50b Which of the following best describes how affordable you find your water and sewerage bill and other household bills? Please remember, this research is entirely confidential and that it is only by talking to people in debt, or struggling to pay their bills, that change can be influenced.

SINGLE CODE

1	I always pay my water bill, and other household bills, on time	
2	I always pay my water bill on time, but sometimes struggle, or am late, paying other bills	STRUGGLING
3	I sometimes pay my water bill late	STRUGGLING
4	I often find it difficult to pay my water bill on time	IN DEBT
5	I am rarely, or never, able to pay my water bill on time	IN DEBT
6	Prefer not to answer	

Finally, a bit more about you

Before we finish there are just a few more questions which will help us to understand different customers and what they want from their water services in the future. The answers you give will be kept confidential.

Q30. DELTED QUESTION

Q31. DELTED QUESTION

Q50. Is anyone in your household registered on the Priority Service Register? The Priority Services Register is for water customers who may need extra support or additional services - e.g. braille bills, or bottled water deliveries in the event of the water supply being interrupted.

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Yes **GO TO 51**
 No
 Prefer not to say **GO TO Q51**
 Don't know

Q50a There are a wide range of factors that could mean anyone might need extra help or support from their water company. You can click here for more information on the Priority Services Register. Having read this, do you feel that any of the following factors apply to you or anyone in your household at the moment, meaning you might need extra support or help. Do you believe you or someone else in your household who may be eligible to be on South Staffs Water/Cambridge Water's Priority Services Register?

Yes
 No
 Prefer not to say
 Don't know

Q51. We want to take account of the views of people of all incomes. Which of the following annual income bands does your household fall into? Please take into account the income of all of those in the household before tax and national insurance and include pensions, benefits or extra earnings.

	Per Week	Per Year
A	Up to £327	Under £17,005
B1	£327-£442	£17,005 - £23,000
B2	£443-£721	£23,001 - £37,500
B3	£722-£1000	£37,501 - £52,000
C	£1001+	£52,001+
D	Prefer not to say	

Q52. Do you/your partner or other members of your household receive any benefits or tax credits?

	ON BENEFITS
1 Yes, myself MULTICODE	
2 Yes, someone in my household MULTICODE	
3 No	
4 Prefer not to say	

Q32. DELTED QUESTION

Q54. Which of the following best describes your background?

WHITE
 1. British
 2. Irish
 3. Any other White background

MIXED
 4. White and Black Caribbean
 5. White and Black African
 6. White and Asian
 7. Any other Mixed background

ASIAN OR ASIAN BRITISH
 8. Indian
 9. Pakistani
 10. Bangladeshi

11. Any other Asian background

BLACK OR BLACK BRITISH

12. Caribbean
 13. African
 14. Any other Black background

CHINESE OR OTHER ETHNIC GROUP

15. Chinese
 16. Any other ethnic group

Prefer not to say

Q55. **SSC SAMPLE:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H₂Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service*

Yes
 No

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

Q56. Would you like to see the results of the study and how South Staffs Water / Cambridge Water is using customers' feedback to help shape their plans? This information will be available to share from October 2022 and a link will be sent to you by e-mail.

Yes
 No

Q56a **DYNATA SAMPLE ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H₂Online. The community allows customers to take part in activities to help shape their future plans and also hear about how this feedback is being used to improve the service. If you are interested, please click the link below:

<https://www.south-staffs-water.co.uk/community/h2online>
<https://www.cambridge-water.co.uk/community/h2online>

Q57. **SSC SAMPLE ONLY:** We really appreciate the time that you have given us today. Would you be willing to be contacted again by Accent to allow them to clarify any responses you have given today, or to be invited to take part in other related research for South Staffs Water/Cambridge Water?

Yes, for both clarification and further related research
 Yes, for clarification only
 Yes, for further related research only
 No

Q57a **SSC SAMPLE ONLY:** South Staffs Water/Cambridge Water is very keen to understand customer views in order to help improve the services and support they offer. To help them do this, do you give permission for us to pass back your details and responses to them so they know how you personally feel about the service they provide? No sales calls or unwanted contact will result from this. **SINGLE CODE**

APPENDIX B

QUESTIONNAIRES

Yes
No

Q57b **SSC SAMPLE ONLY:** Occasionally customers provide responses in surveys that indicate they may benefit from a call with a South Staffs Water/Cambridge Water representative (for example if they've received poor service or if they need to talk about their bill or the amount they pay). Do you give permission for us to pass your details back to South Staffs Water/Cambridge Water if your responses indicate there may be a benefit to you in talking to them to improve the service and/or the support you receive from them? **SINGLE CODE**

Yes
No

Q58. **SSC sample only:** Thank you for taking the time to give your feedback. Please select how you would like to receive your £5 thank you:

Love2shop gift voucher – accepted at over 20,000 retailer outlets
Donation to Water Aid – a charity who works globally to ensure more people have access to clean water every day
Donation to The Trussell Trust – who run a nationwide network of food banks

This research was conducted under the terms of the UK Market Research Society code of conduct and is completely confidential.

SYSTEM INFORMATION

Time interview completed:

APPENDIX C

STIMULUS MATERIALS - CAM

About Cambridge Water



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

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day
- Drinking water comes from 23 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- Cambridge Water is **NOT** responsible for treating wastewater in your area. That is the responsibility of Anglian Water, so they will be the ones who have to consider how to prevent any pollution incidents
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall

Cambridge Water's and South Staffs Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,580km of pipes, powered by 113 pumping stations
- Operate 40 water treatment works - 20 in the Cambridge region
- Maintenance, repairs and renewals of all these assets
- Delivering water to customers' premises and fitting water meters
- Protecting and improving the natural environment by working with landowners - i.e. wildlife, trees, plants, rivers and streams



Customer facing activities

- Read meters: 75% of customers have meters in the Cambridge region / 45% in the South Staffs
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help just over 45,000 customers with discounted bills and assist over 58,850 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply.



Cambridge Water is facing a number of big challenges in the future

- **Increased demand for water due to:**
 - population of the region being forecast to increase by **19%** by 2045
 - property development – **46,500** new homes are expected to be built by 2045
- **Changing rainfall patterns** leading to **higher risk of flooding or longer periods of drought** - climate change means that the region is forecast to have drier summers, with up to **60%** less rainfall, and wetter winters, with up to **30%** more rainfall, by 2080s. The last hose pipe ban in this region was in 1991
- Further **reducing leakage from pipes** – currently around **15%** of treated water is lost to leaks each day, which is below the national average of 20%. 7 of every 10 litres that leak are lost from the company's pipes and 3 out of 10 from pipes owned by customers on their properties
- **Reducing carbon emissions** to combat the impacts of global warming and **reducing the use of non-recyclable plastic**
- **Educating, informing and helping customers** to use less water and reuse more.
- **Protecting and improving the water environment:** taking water from underground chalk aquifers for human needs could lead to a deterioration of the water environment. Currently, only **16%** of rivers in England are classed by the Environment Agency as being in ecologically good condition - i.e. healthy and able to fully recover if damaged
- Ensuring services are **accessible** to all customers who need extra support and providing **financial support** and advice to customers who are struggling to pay their bills



All whilst balancing the need for affordable water bills and ensuring the long-term resilience of water services to meet these challenges

APPENDIX C

STIMULUS MATERIALS - SSW

About South Staffs Water



- Serves 1.3 million people across 1,500 km²
- Supply approx. 567,000 homes and almost 34,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 19 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- South Staffs Water is **NOT** responsible for treating wastewater in your area. That is the responsibility of Severn Trent Water, so they will be the ones who have to consider how to prevent any pollution incidents
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge

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



South Staffs Water's and Cambridge Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,622km of pipes, powered by 113 pumping stations
- Operate 41 water treatment works
- Maintenance, repairs and renewals of all these assets
- Delivering water to customers' premises and fitting water meters
- Protecting and improving the natural environment by working with landowners - i.e. wildlife, trees, plants, rivers and streams



Customer facing activities

- Read meters: 45% of customers have meters in the South Staffs region / 75% in Cambridge
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help just over 45,000 customers with discounted bills and assist over 58,850 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply, or visiting a Community Hub.



South Staffs Water is facing a number of big challenges in the future

- **Increased demand for water due to:**
 - population of the region being forecast to increase by **18%** by 2045
 - property development – **125,000** new homes are expected to be built by 2045
- **Reducing carbon emissions** to combat the impacts of global warming and **reducing the use of non-recyclable plastic**
- **Educating, informing and helping customers** to use less water and reuse more.
- **Protecting the water environment:** taking water from rivers and underground sources for human needs could lead to a deterioration of the environment. Currently, only **16%** of rivers in England are classed by the Environment Agency as being in ecologically good condition - i.e. healthy and able to fully recover if damaged
- Ensuring services are **accessible** to all customers who need extra support and providing **financial support** and advice to customers who are struggling to pay their bills



All whilst balancing the need for affordable water bills and ensuring the long-term resilience of water services to meet these challenges

THANK YOU!



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