

# Accent

 PJM economics

## WRMP24: MCDA, Theme 2 & Strategic choices, Themes 1&3 Research Method Statement

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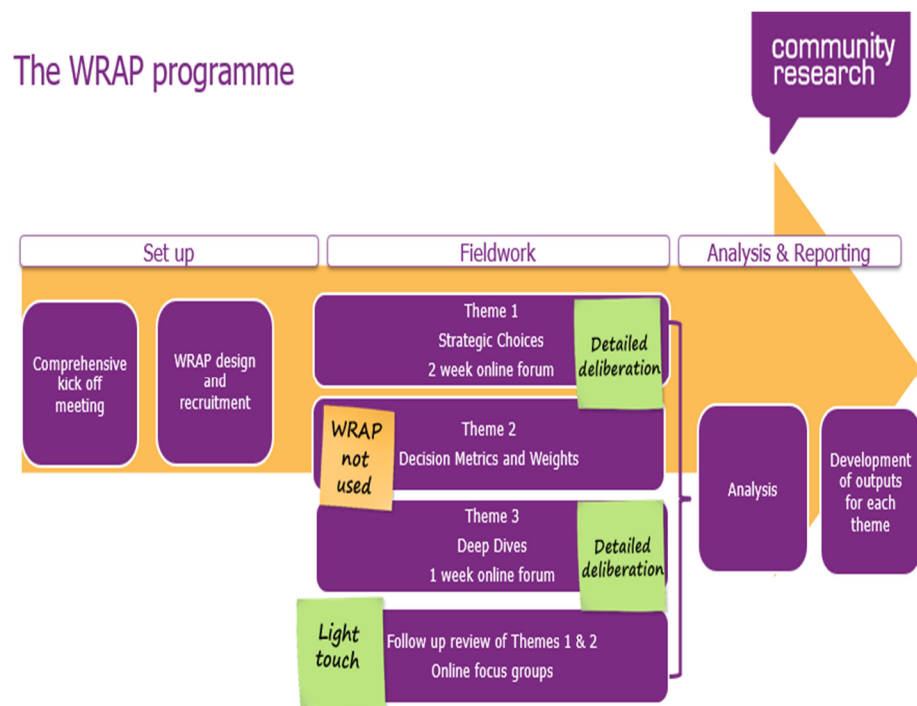
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# 1 Introduction

Accent and PJM Economics developed a core customer research programme based on four themes to support SSC’s draft WRMP24. This was developed from a comprehensive desk research study completed in February 2021:



Work undertaken has included a qualitative Water Resources Advisory Panel (WRAP) programme which has been used to steer the development of materials for two phases of quantitative work covering Multi-Criteria Decision Analysis (MCDA), universal metering, environmental ambition, leakage and managing droughts:



# 2 Multi-criteria Decision Analysis (MCDA) weights & metrics, Theme 2

## 2.1 Introduction

Water companies are responsible for involving customers, interested parties, statutory and non-statutory consultees in the development of their water resources management plans (WRMP). Requirements and principles for this involvement are outlined in the Water Resources Planning Guideline (WRPG) (EA, NRW and Ofwat, 2021); and the UKWIR Best Value Planning Guidelines (UKWIR, 2020).

Requirements and expectations for water resources management planning have moved on considerably since the previous WRMP in 2019. Key developments include:

- A new requirement to develop regional plans as well as company plans, and for them to be consistent with one another. South Staffs Water and Cambridge Water plans must be aligned with the regional plans of Water Resources West (WRW) and Water Resources East (WRE) respectively; and
- New guidance around 'best value' planning, issued as part of the water resources planning guidelines (WRPG) and elaborated into a full best value planning framework within UKWIR (2020).

For the regional plan, Water Resources West (WRW) selected a suite of metrics, via a stakeholder workshop, to support the development of a best value plan<sup>1</sup>. These included metrics based on environmental, social and economic criteria. Furthermore, WRW commissioned a team led by HR Wallingford to produce a multi-criteria option selection and scheduling tool (ValueStream) based on these metrics.<sup>2</sup> The tool takes as inputs the supply-demand deficit to be solved, the values of the decision metrics for the set of feasible water supply-demand options, and a set of weights to determine how those metrics should be balanced against one another in selecting and scheduling options.

An initial set of weights was derived for the tool in Summer 2021 via two stakeholder workshops<sup>3</sup>. Quantitative research with customers was recommended as an outcome of these workshops in order to obtain a revised set of weights based directly on customer preferences, rather than being based on stakeholder views alone.

In line with this requirement, Accent and PJM Economics were commissioned by South Staffs Water to conduct a programme of quantitative research to explore customer views and values on specific issues relating to WRMP24, including their preferences for South

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<sup>1</sup> See Water Resources West (2021) Decision metrics definitions. Supplementary note to the decision-making methodology. May 2021.

<sup>2</sup> See HR Wallingford (2021a) Water Resources West Regional Plan Decision Tool – ValueStream User Guide. November 2021.

<sup>3</sup> See HR Wallingford (2021b) Water Resources West Regional Plan Decision Tool – Workshop report. August 2021.

Staffs Water's water supply-demand options. The core focus of this research was to derive a set of customer preference weights to input into the ValueStream tool, with a secondary objective to explore preferences across the supply-demand options directly.

At the same time, DJS and PJM Economics were commissioned by United Utilities and Severn Trent, to conduct parallel pieces of quantitative research that each incorporated the same research design to obtain customer preference weights for ValueStream, so that the results would be directly comparable.

In line with the above research objectives, PJM Economics designed a common stated preference choice exercise for inclusion in customer research for three WRW companies: Severn Trent Water, United Utilities and South Staffs Water.

For Cambridge Water, the company had a greater degree of flexibility within the WRE planning framework regarding how customer input could be used to inform the selection of options. Thus, whilst the WRE regional model did not require the same inputs as the WRW model for which the customer research was designed, the company's own water resources planning tool could be adapted to make use of the outputs of the research in a similar way.

## 2.2 Survey mode and sample

A target of 1,000 interviews was set, with the aim of conducting 600 interviews in the SSW region and 400 in CAM.

The data was collected through a mixed method involving the use of the following commercial panels; Savanta, Respondi, Dynata and Youthsight, sample provided by SSC and face to face interviews. The latter element was used to target customers seen to be under/not at all represented through both SSC sample and commercial panels. These include:

- Digitally excluded
- Social grades DE
- Non white customers
- Those at the extremes of the age spectrum.

## 2.3 Quotas and weighting

Quotas were set on the overall sample. SSC sample was used to help guide the different quotas where shortfall was seen from the commercial panel.

Hard quotas were not imposed on the overall sample, rather minimum and maximum quotas were applied to ensure a broadly representative sample against which weighting was applied. Quotas were set to +/- 15% of the ONS statistics for:

- Age
- Social grade

- Gender
- Meter status (against SSC statistics)

The final data set was weighted. The weights for households were generated based on age, gender, segmentation code and customer region.

The weights for non-households were generated based on the number of business employees.

## 2.4 Interviews achieved

A total of 1,015 interviews was achieved, 570 in SSW and 445 in CAM. The breakdown of household interviews by survey mode, demographics and SSC segment is shown below.

Minimum targets missed are highlighted in blue.

Meter Status			Gender			Social Grade			Age		
SSW	Target	Status	SSW	Target	Status	SSW	Target	Status	SSW	Target	Status
Metered	239	265	Female	291	275	AB	97	136	16-34	108	92
Unmetered	331	271	Male	279	215	C1C2	291	203	35-49	171	124
CAM			CAM			DE	182	129	50-64	143	147
Metered	274	297	Female	190	196	CAM			65+	148	127
Unmetered	106	96	Male	190	193	AB	133	151	CAM		
Bill Payer Status			Sample Source			C1C2	182	121	16-34	68	49
Total	Target	Status	SSW	Target	Status	DE	65	100	35-49	118	82
Bill payer	n/a	965	Panel	300	281	Age					
Non payer	n/a	33	SSC	300	312	50-64	103	122	65+	95	139
Type			CAM								
Total	Target	Status	Panel	200	190						
HH	n/a	887	SSC	200	281						
NHH	n/a	128									

The fieldwork was conducted between 20<sup>th</sup> December 2021 and 4<sup>th</sup> March 2022.

The survey targeted those responsible (either jointly or solely) for paying the household water bill or, in the case of NHH participants, the organisation's water bill. A smaller target of 50 was also set to achieve interviews with future customers, i.e. current non-bill payers aged under 25.

## 2.5 Survey Design


The questionnaire is shown in Appendix A.

The questionnaire was structured as follows:

- Screening questions
- Satisfaction with service and value for money
- Experience of contacting SSW/CAM
- Customers' relationship with and attitudes towards the natural environment
- Introduction to SSC's WRMP
- Views on planning for the future
- Priorities for investment – water supply options
- Options for the water resources plan (stated preference exercise)
- Exercise diagnostics
- Participant characteristics

Materials used to introduce SSC's WRMP are shown below (note: the versions shown relate to SSW household customers; alternative sets were designed for SSW NHH participants, CAM HH participants and CAM NHH participants):

### About South Staffs Water

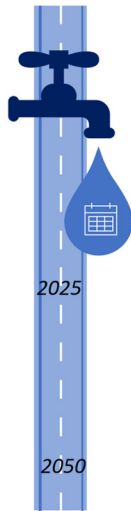


- Serves 1.3 million people across 1,500 km<sup>2</sup>
- Supply approx. 562,000 homes and almost 34,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 19 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is 2% of the bill
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region has recently been classed by the government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being able to meet human demand.

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	Customer facing activities
<ul style="list-style-type: none"> <li>■ Taking/collecting water from the environment</li> </ul>	<ul style="list-style-type: none"> <li>■ Read meters: 45% of customers have meters in the South Staffs region/75% in Cambridge</li> </ul>
<ul style="list-style-type: none"> <li>■ Transport water– through 8,622km of pipes, powered by 113 pumping stations</li> </ul>	<ul style="list-style-type: none"> <li>■ Send out bills: including offering an online MyAccount service</li> </ul>
<ul style="list-style-type: none"> <li>■ Operate 41 water treatment works</li> </ul>	<ul style="list-style-type: none"> <li>■ Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts</li> </ul>
<ul style="list-style-type: none"> <li>■ Maintenance, repairs and renewals of all these assets</li> </ul>	<ul style="list-style-type: none"> <li>■ Extra support: help over 39,000 customers with discounted bills and assist when needed over 49,000 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.</li> </ul>
<ul style="list-style-type: none"> <li>■ Delivering water to customers' premises and fitting water meters</li> </ul>	
<ul style="list-style-type: none"> <li>■ Protecting and improving the natural environment by working with landowners i.e. wildlife, trees, plants, rivers and streams</li> </ul>	



## South Staffs Water's Water Resources Management Plan

South Staffs Water is developing its **Water Resources Management Plan**

The next plan covers the next 25 years up to 2050 and has to be updated every 5 years.

This sets out:

- how they are going to **provide a secure and reliable supply of water for customers**
- and the measures it will take to **protect the water environment from damage** – such as lakes, rivers, underground water stores called aquifers.

In their planning, South Staffs/Cambridge Water need to **think about options to make the best use of the water** that they have and also **options to provide more water**. As part of this they need to think about questions like:

- **Is it what customers want them to do** and what will the impact of their decisions be on customers?
- How much will it **cost** and what impact will this have on **customers' bills**?
- Will it **impact the environment**?
- Will it give them the **water quality** needed?
- Will it give a **reliable supply** over the long-term?

## South Staffs Water's Water Resources Management Plan



South Staffs Water also has to develop a Drought Plan which outlines what the company and customers will do in situations when there is not enough water to meet demand for all human activities – such as during a long period of hot weather with no or little rainfall.

South Staffs Water is not responsible for taking away your wastewater or sewage. That is handled by Severn Trent Water who also develop a plan about how they handle and treat waste water to protect water sources like rivers and also prevent flooding from sewers. South Staffs Water support them in that work and have their own catchment management plan where they work with farmers and other land owners to protect water sources from pollution run-off.

South Staffs Water also work with other water companies and organisations who have an interest or who will be affected by decisions, for example local businesses and environmental organisations.

They produce a plan at a company level but also need to fit into a regional plan for the West of England and Wales to ensure their water resource plans are joined up with those of other companies.

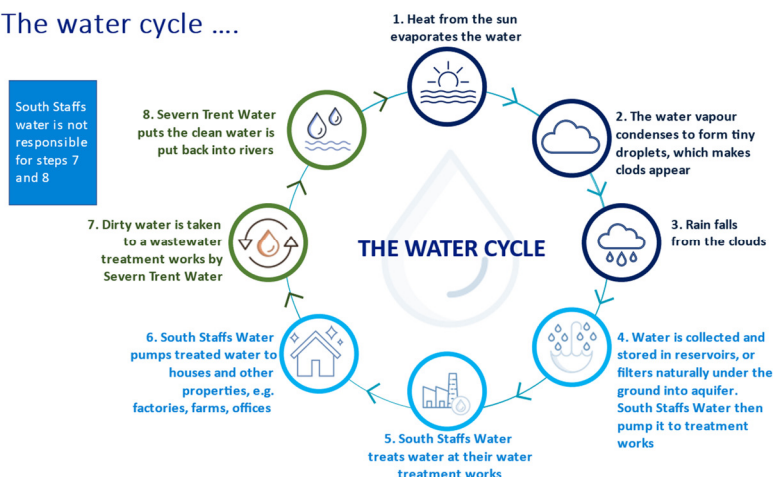
## South Staffs Water is facing a number of big environmental challenges in the

- **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.
- **Reducing the amount of bad plastics** (e.g those that are not fully recyclable) used in business operations.
- **Changing rainfall patterns leading to higher risk of flooding or longer periods of drought** - climate change means that we are forecast to have drier summers with 50% less rainfall and wetter winters with 30% more rainfall by 2080s. The last hose pipe ban in this region was in 1976.
- **Educating, informing and helping customers** to use less water and reuse more. The COVID-19 pandemic means water use went up 9% in total in 2020/21, compared with the year before.
- **Further reducing leakage from pipes** – currently around 20% of treated water is lost to leaks each day, which is about the same as the national average. 7 of every 10 litres is lost from leaks from the company's pipes and 3 out of 10 from customers' pipes.
- **Protecting the water environment:** some of the water taken 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.

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

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## The water cycle ....



Ten water supply options were shown to SSW participants and nine were shown to CAM participants. Participants were shown details on each scheme including:

- An option description
- The impact of each option by:
  - Relative cost
  - Carbon reduction
  - Reduction flood risk
  - Human and social wellbeing
  - Habitats for nature wildlife and plants
  - River flows and water quality
  - The amount of water resources available.

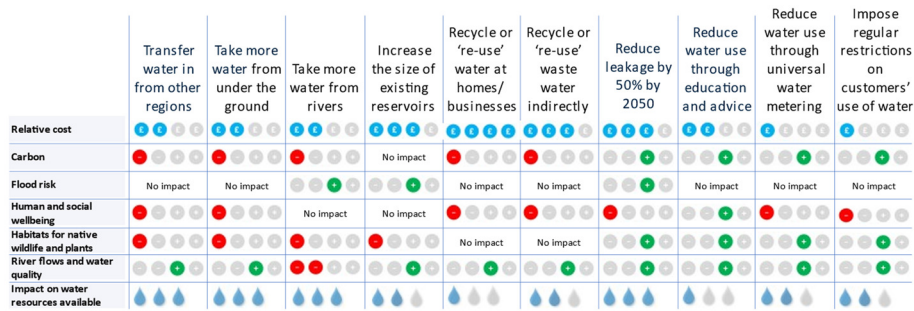
An example showcard (for leakage reduction) is shown below:

### Reduce leakage by 50% by 2050

Option description	Impact <sup>i</sup>
In 2020-21 leakage was 65.5 million litres per day, or 26 Olympic swimming pools. Leaks can occur on the water company's pipe network (70% of the total) or in pipe found on customers' homes (30% of total). Methods used to reduce leakage include; preventing leaks, raising awareness of leaks, locating leaks and mending leaks.	<b>Relative cost</b>
	<b>Carbon</b>
	<b>Flood risk</b>
	<b>Human and social wellbeing</b>
	<b>Habitats for native wildlife and plants</b>
	<b>River flows and water quality</b>
	<b>Impact on water resources available</b>
	<b>Key:</b>
£ This is the cost to South Staffs Water but will impact on customer bills further down the river. The more signs shown, the higher the cost and the greater the likelihood this will impact on customer bills	+ The amount of increase in each measure the option will result in. The more green plus signs, the more the positive impacts or reduction in negative effects!
- The amount of reduction in each measure this option will result in. The more minus signs, the more the negative impact or increase in negative effects!	The more water drops shown, which are coloured blue, the more effective the option is at providing the amount of water needed for future demand



Having viewed a showcard for each option, participants were then shown a summary which they could refer to when making their preference choices:



**Key:**

- £ This is the cost to South Staffs Water but will impact on customer bills further down the bill. The more £ signs shown, the higher the cost and the greater the likelihood this will impact on customer bills
- +
- 
- Water drops shown, which are coloured blue, the more effective the option is at providing the amount of water needed

The stated preference exercise for the decision metric weights included an introduction where participants were able to view a walk-through gif example of the pairwise choice exercise.

Participants were shown 8 choice sets with different showcards used for HH and NHH participants (the difference being that HH customers were shown the potential bill impact in real terms based on their stated bill; and NHH customers were shown the potential bill impacts in percentage terms). Examples of the relevant choice sets are shown below:

**HH example:**

Which option would you prefer, A or B?

	A	B
River flows and water quality	Moderate positive impact	No impact
Carbon emissions	No impact	Major increase equivalent to the emissions of around 300 households per year
Flood risk	Moderate negative impact	No impact
Human & social wellbeing	Moderate negative impact	Moderate negative impact
Habitats for native wildlife and plants	Major negative impact	No impact
Your annual water bill	£158.40 per year (£38.40 more than now)	£139.20 per year (£19.20 more than now)

Option A
  Option B

### NHH Example:

Which option would you prefer, A or B?

	A	B
River flows and water quality <sup>i</sup>	Major negative impact	Major negative impact
Carbon emissions <sup>i</sup>	No impact	No impact
Flood risk <sup>i</sup>	Major negative impact	Moderate negative impact
Human & social wellbeing <sup>i</sup>	Moderate negative impact	Major negative impact
Habitats for native wildlife and plants <sup>i</sup>	Major negative impact	Moderate positive impact
Your annual water and sewerage bill	4% more than now	0.5% more than now

Option A       Option B

Participants were shown a series of 8 questions, each offering a pair of different possible options for the plan and were asked to select the one they would prefer based on the information shown.

Participants were advised that one of the impacts relates to the change in their water bill; and that for some options there will be no increase to their bill while in others there will be an increase.

When choosing which option they prefer in each case, participants were asked to consider:

- Whether the impacts shown are important to them/their organisation; and
- Their household/organisation's overall income and expenses, remembering that:
  - Any money they pay/their organisation pays for improvements will not be available for them/their organisation to spend elsewhere
  - Other household/organisation bills may go up or down affecting the amount of money they/their organisation has to spend in general

## 2.6 Testing

The survey materials were designed to be comparable with similar studies being undertaken by United Utilities (UU) and Severn Trent Water (SVT). Cognitive testing was undertaken by DJS Research who undertook the work for UU and SVT.

The cognitive testing was followed by a formal pilot of 50 interviews. This was conducted through a commercial panel, Dynata. The pilot was used to test:

- the recruitment process
- the clarity and flow of the questionnaire
- the appropriateness of the language used
- the accuracy of all routings
- ease of use of the show material

- the interview duration
- the survey hit rate.

## 2.7 Analysis

Once the main data was collected, the following types of analysis were carried out on the choice data.

- First, tabular analyses will be used to examine the data, in order to get an overall picture of the choice behaviour of the respondents in the sample. Cross-tabulations with important variables were examined in order to establish a descriptive understanding of the data, along with any issues with respect to its validity, prior to econometric analysis. At this point weights were derived and incorporated within the analysis dataset
- Second, discrete choice econometric models were developed to explain the choices made by respondents as a function of the attribute levels shown. In discrete choice models, a utility function is defined such that utility is composed of the different attributes describing that service multiplied by coefficients that reflect the importance of these services. It is these coefficients which were estimated in the model analysis
- Third, the utility functions was used to derive trade off weights, typically calculated by exponentiating the coefficients and scaling them to sum to 100.

In respect of the econometric analysis, mixed logit models were used. These models are superior to the more common conditional, or multinomial, logit models for the following reasons.

- They produce estimates of variances within the population, and subpopulations, as well as estimates of mean model parameters
- They allow for correlation in preferences across the choices made by respondents, which in turn:
  - allows for more flexible, and hence realistic, substitution patterns between alternatives
  - gives more accurate estimates of the statistical confidence intervals around the results
- They allow for calculation of individual-level coefficients, which in turn allows for the segmentation of results by any cut of the sample data.

## 2.8 Validity Appraisal

The validity of the outputs of the quantitative analysis were assessed along two broad dimensions; content and construct validity.

**Content validity** judgements take into account the entirety of the study with the key test being that valid values are revealed by participants in the stated preference survey. Examples of content validity analysis include examination of responses to verbatim

follow-up questions (following the SP exercise) to verify that participants understood the survey and found the choices realistic and not too difficult to choose.

**Construct validity** assessments take into account the extent to which the output conform with prior expectations. Examples of construct validity testing included analysing the internal consistency of response data with expectations and drawing comparisons of the results against those from previous studies where appropriate.

# 3 Themes 1 & 3

## 3.1 Introduction

The purpose of this second study was to understand customer responses to:

- Managing Droughts:
  - Uninformed preference for frequency of TUBs and NEUBs
  - Uninformed acceptability of current level of risks
  - Informed support for 2040 target (for reducing the need for rota cuts/standpipes to no more than once every 500 years)
  - Informed preference for frequency of TUBs and NEUBs
- Leakage Ambition:
  - Uninformed preference for leakage target
  - Informed support for 2050 target
- Universal Metering:
  - Uninformed support for universal metering
  - Informed support for universal metering
  - Preference for metering roll out strategy
  - Willingness to pay for delivering universal metering within a number of different timelines
  - Preference and willingness to pay for more frequent meter reading
- Environmental Ambition:
  - Informed support for three potential environmental options with associated indicative bill impacts
  - Preference for timing of delivery of environmental ambition.

Content for the study was driven by insights from the qualitative work conducted by Community Research.

## 3.2 Survey mode and sample

A target of 1,000 interviews was set, with the aim of conducting 600 interviews in the SSW region and 400 in CAM.

The data was collected through a mixed method involving the use of the following commercial panels; Respondi, Dynata and Youthsight, sample provided by SSC and face to face interview. The latter element was used to target customers seen to be under/not at all represented through both SSC sample and commercial panels. These included:

- Digitally excluded
- Social grades DE
- Non white customers
- Those at the extremes of the age spectrum.

### 3.3 Quotas and weighting

Quotas were set on the overall sample. SSC sample was used to help guide the different quotas where shortfall was seen from the commercial panel.

Hard quotas were not imposed on the overall sample, rather minimum and maximum quotas were applied to ensure a broadly representative sample against which weighting was applied. Quotas were set to +/- 15% of the ONS statistics for:

- Age
- Social grade
- Gender
- Meter status (against SSC statistics).

The final data set was weighted. The weights for households were generated based on age, gender, segmentation code and customer region.

The weights for non-households were generated based on the number of business employees.

### 3.4 Interviews achieved

A total of 1,180 interviews was achieved, 753 in SSW and 427 in CAM. The breakdown of household interviews by survey mode, demographics and SSC segment is shown below.

Minimum targets missed are highlighted in blue.

Meter Status			Gender			Social Grade			Age		
SSW	Target	Status	SSW	Target	Status	SSW	Target	Status	SSW	Target	Status
Metered	239	337	Female	291	364	AB	97	193	16-34	108	101
Unmetered	331	353	Male	279	279	C1C2	291	237	35-49	171	183
<b>CAM</b>			<b>CAM</b>			DE	182	199	50-64	143	203
Metered	274	270	Female	190	187	<b>CAM</b>			65+	148	158
Unmetered	106	112	Male	190	185	AB	133	142	<b>CAM</b>		
<small>Not included: Prefer not to say/Refused</small>			<small>Not included: Prefer not to say/Refused</small>			C1C2	182	116	16-34	68	61
<b>Bill Payer Status</b>			<b>Sample Source</b>			DE	65	103	35-49	118	86
Total	Target	Status	SSW	Target	Status	<small>Sample may not add up to total as some participant cannot be classed as any SEG (future customers)</small>					
Bill payer	n/a	978	Panel	300	407	<small>Not include Prefer not to say/ Refused</small>					
Non payer	n/a	34	SSC	300	285	Accent F2F	60	61	50-64	103	100
<b>Type</b>			<b>CAM</b>			Panel	200	157	65+	95	129
Total	Target	Status	Panel	200	157	SSC	200	229			
HH	1,000	1,028	Accent F2F	40	41						
NHH	Min 100	152									

The fieldwork was conducted between 4<sup>th</sup> February to 28<sup>th</sup> March 2022.

The survey targeted those responsible (either jointly or solely) for paying the household water bill or, in the case of NHH participants, the organisation's water bill. A smaller target of 50 was also set to achieve interviews with future customers, i.e. current non-bill payers aged under 25.

It should be noted that the research conducted for Themes 1 and 3 was conducted at a time when the cost of living were high on everyone’s radar – with rising inflation, energy and food prices. This may have influenced people’s perceptions of the affordability of the cost of the options shown to them during the engagement in spite of the associated bill increases not taking effect for several years.

### 3.5 Survey Design

The questionnaire is shown in Appendix B.


The questionnaire was structured as follows:

- Screening questions
- Satisfaction with service and value for money
- Experience of contacting SSW/CAM
- Customers’ relationship with and attitudes towards the natural environment
- Introduction to SSC’s WRMP
- Views on planning for the future
- Preferences for SSC’s options for managing droughts
- Preferences for SSC’s options for dealing with leakage
- Preferences for SSC’s options for rolling out universal metering
- Views on SSC’s environmental ambition
- Participant characteristics.

The questionnaire was designed taking into account findings from the qualitative research undertaken for SSC by Community Research. Learnings from the qualitative insight were particularly helpful when designing the show material for the quantitative study.

Materials used to introduce SSC’s WRMP are shown below (note: the versions shown relate to SSW household customers; alternative sets were designed for SSW NHH participants, CAM HH participants and CAM NHH participants):

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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

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- Merged with Cambridge Water in April 2013
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### South Staffs Water's Water Resources Management Plan

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- and the measures it will take to **protect the water environment from damage** – such as lakes, rivers, underground water stores called aquifers.

In their planning, South Staffs/Cambridge Water need to **think about options to make the best use of the water** that they have and also **options to provide more water**. As part of this they need to think about questions like:

- Is it what customers want them to do** and what will the impact of their decisions be on customers?
- How much will it cost** and what impact will this have on **customers' bills**?
- Will it impact the environment?**
- Will it give them the water quality** needed?
- Will it give a reliable supply** over the long-term?

### South Staffs Water's Water Resources Management Plan



<p>South Staffs Water also has to develop a Drought Plan which outlines what the company and customers will do in situations when there is not enough water to meet demand for all human activities – such as during a long period of hot weather with no or little rainfall.</p>	<p>South Staffs Water is not responsible for taking away your wastewater or sewage. That is handled by Severn Trent Water who also develop a plan about how they handle and treat waste water to protect water sources like rivers and also prevent flooding from sewers. South Staffs Water support them in that work and have their own catchment management plan where they work with farmers and other land owners to protect water sources from pollution run-off.</p>	<p>South Staffs Water also work with other water companies and organisations who have an interest or who will be affected by decisions, for example local businesses and environmental organisations.</p>	<p>They produce a plan at a company level but also need to fit into a regional plans for the West of England and Wales to ensure their water resource plans are joined up with those of other companies.</p>
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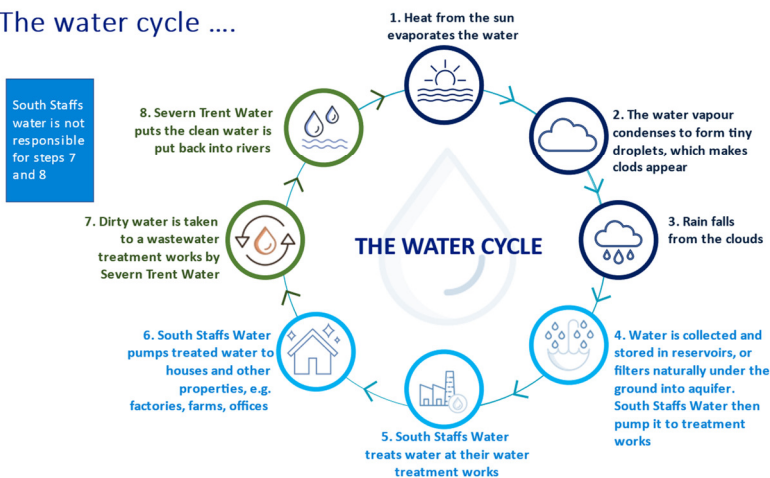
## South Staffs Water is facing a number of big environmental challenges in the

- 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.
- Changing rainfall patterns leading to higher risk of flooding or longer periods of drought** - climate change means that we are forecast to have drier summers with 50% less rainfall and wetter winters with 30% more rainfall by 2080s. The last hose pipe ban in this region was in 1976.
- Further reducing leakage from pipes** – currently around 20% of treated water is lost to leaks each day, which is about the same as the national average. 7 of every 10 litres is lost from leaks from the company’s pipes and 3 out of 10 from customers’ pipes.
- Reducing carbon emissions** to combat the impacts of global warming.
- Reducing the amount of bad plastics** (e.g those that are not fully recyclable) used in business operations.
- Educating, informing and helping customers** to use less water and reuse more . The COVID-19 pandemic means water use went up 9% in total in 2020/21, compared with the year before.
- Protecting the water environment:** some of the water taken 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.

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

Accent

## The water cycle ....



## Managing Droughts

Participants were first asked their uninformed opinions on the options SSC could take in terms of managing droughts; after which they were shown information about how droughts are defined and how water supplies are managed. Participants were then asked their informed views on what actions they would like SSC to take in the future. The information presented to customers is shown below:



**Level 1:** Groundwater could be just a little below average for the time of year



**Level 4:** Groundwater level could be extremely low, a severe drought

Cambridge Water looks at groundwater levels to work out how severe a drought is. The lower the level, the more severe the drought – i.e. from:

- **Level 1** (groundwater could be just a little below average for the time of year); to
- **Level 4** (groundwater level could be extremely low, a severe drought)

Your water company also looks at the level of water compared to what it normally is at that time of year. So, a reservoir or underground aquifer that is 80% full in July might be good, but in February this may give them cause for concern as they aren't fully stocked up ready to support the drier summer period ahead when typically more water is used by customers



**Level 1:** Groundwater could be just a little below average for the time of year



**Level 4:** Reservoir water is extremely low, a severe drought

South Staffs Water looks at levels in its Blithfield Reservoir to work out how severe a drought is. The lower the level, the more severe the drought – i.e. from:

- from **Level 1** (reservoir water level could be a little low); to
- **Level 4** (reservoir water is extremely low, a severe drought)

Your water company also looks at the level of water compared to what it normally is at that time of year. So, a reservoir or underground aquifer that is 80% full in July might be good, but in February this may give them cause for concern as they aren't fully stocked up ready to support the drier summer period ahead when typically more water is used by customers

### Reducing water use during a drought



**Level 1 drought**, water companies tell customers about the drought and encourage them to use less water on non-essential uses - e.g. cleaning your windows  
As droughts get more severe, water companies consider imposing restrictions on how their customers use water. The more severe the drought, the more severe the restrictions that are needed



**Level 2 drought**, water companies consider using 'temporary use bans'. These used to be called 'hosepipe bans' but the name was changed because the restrictions aren't only about hosepipes. They restrict non-essential water use at home, like filling up paddling pool or hot tub and using a hosepipe to water the garden, wash a car, wash a patio



**Level 3 drought**, water companies consider using 'non-essential use bans' which means that businesses can't use water for activities like cleaning windows or watering grounds. They also restrict water use in businesses such as swimming pools, car washes, and garden centres

**Level 4 severe drought**, water companies consider using 'emergency drought orders' to substantially reduce water use. They could use standpipes (where people have to get their water from standpipes in the street; vulnerable customers receive bottled water drops) or rota cuts (people only being able to use water in their homes on, say, alternate days). All non-essential businesses (e.g. leisure, some shops) would likely need to close as water would not be supplied to them



Water companies need to apply to the Government for permission to use level 4 restrictions. And they would also look to use support from the government (such as the army) and other water companies to make sure all customers had a supply of clean drinking water for essential uses

## Leakage

Participants were asked their uninformed views on what level of leakage they would want SSC to plan for in the future.

Participants were then given information about how SSC could tackle leakage and asked their support for the national target of reducing leakage (for SSC this would mean that the rate of leakage by 2050 would be 10% of water produced lost each day compared to 20% /for CAM this would mean that the rate of leakage by 2050 would be 8% of water produced lost each day, compared to the 16%). They were also asked their informed views on they would like this national target reached by. The information they were given is shown below:

*The company is using new ways to tackle leakage (like new pipe materials which last longer, using satellites to find leaks or fitting smart sensors which pick up when a leak has started or is about to start). However, even with advances in technology, it is not possible to reduce leaks to zero:*

- *Extreme weather, natural wear and tear and heavy traffic mean that pipes will not last forever*
- *There are always new leaks springing up – such as when the ground moves due to the amount of water in the ground*
- *Not all leaks can be found as some are very small*
- *30% of all leaks come from customers' pipes on their property which they are responsible for and not the water company. The company therefore relies on customers to fix these when they are found.*

*The cost of fixing leaks becomes more expensive:*

- *Fixing twice as many leaks won't cost twice as much – it will likely cost three times as much because the leaks that are left are more difficult to find and more expensive to fix*
- *Reducing demand might be a cheaper way to save the equivalent amount of water when compared to fixing difficult leaks.*

*Fixing leaks can also be very disruptive to the local community, for example causing delays to traffic whilst roads and pavements are dug up to replace burst pipes or older pipes that might be about to burst.*

*There is a national target for all water companies to reduce their leakage levels by 50% by 2050: that means that by 2050 levels need to be half the level they were in 2017/18. **SSW:** This would mean that the rate of leakage by 2050 would be 10% of water produced lost each day, compared to 20% last year. **CAM:** This would mean that the rate of leakage by 2050 would be 8% of water produced lost each day, compared to the 16% last year.*

## Universal Metering

Uninformed, participants were asked if they supported the introduction of universal metering. They were then shown the following information before being asked for their

informed support, which approach to metering they would like SSC to take and their willingness to pay for different options:

### Cambridge Water's Current Metering Policy



**Cambridge Water's current target for metering over the next 25 years:**  
90% of household customers would be on a water meter by 2045, up from 75%

In its latest Business Plan (agreed with the water regulator, Ofwat), Cambridge Water set themselves a target for metering over the next 25 years

Virtually all businesses already have a water meter fitted

At the moment water meters are installed in all new builds. Customers can also ask for a water meter to be installed at their property. Cambridge Water does not have a policy of installing a meter when a property changes hand, which some water companies do

However, this could change. Cambridge Water has recently been classed by government as "seriously water stressed". This means that it can now consider universal metering, where all household customers are placed on a water meter (where it's feasible to do so)

### Reducing Water Usage

On average, in 2020/21, customers used **152 litres of water per person per day in the Cambridge Water region**

This is slightly higher than before the pandemic due to more people working from home

To help ensure reliable supplies of water in the future, there is now a national target for all water companies to reduce the amount used to 110 litres per person per day by 2050

2050 Target: **110 litres / person / day**



5 short showers per week



2 washing machine washes per week



5 toilets flushed per day



2 mins hand washing per day

If you do all of the above, then washing the car, watering the garden or taking a long shower would take you over the 110 litre target

### Benefits of all homes and businesses being on a water meter



Everyone pays for the amount of water they use – just like all households and businesses do for their gas and electricity usage



The company is in a better place to spot if a customer's water consumption changes suddenly, which could indicate a leak from a pipe or appliance inside or outside their property



Meters offer the potential for customers to have more understanding of their water usage which helps them to take better decisions about how they want to use water



Metering is seen as one way of reducing customer demand for water. The more people who are on water meters, the more demand could be reduced. For example, national research has shown that household customers use 10% less water, on average, in the years after the meter is fitted. The difference reduces to 5% after 5 years

## Environmental Ambition

Participants were shown information about the water environment before being asked to select one of three levels (together with a notional bill impact) that SSC would take in terms of their environmental ambition:

### The Water Environment

Currently only 16% of waters in England are classed as being in good ecological condition. This is assessed by the Environment Agency and is based on four factors:

- Biological quality: the health and abundance of fish, invertebrates, plants, etc
- Structural quality: are banks capable of supporting wildlife, is the river-bed in good condition to support aquatic and other wildlife?
- What is the water like: the right temperature, the right balance of chemicals and nutrients to allow aquatic and other wildlife to thrive, etc
- Pollution levels: level of chemicals (like nitrates) or fertilizer run-off



Across the area that South Staffs supplies, there are 129 Sites of Special Scientific Interest (SSSIs).

There are also 2 wetlands of international importance (called RAMSAR sites) which are very sensitive to damage.

### Taking Water From Rivers, Streams and Underground



The amount of water that is taken from rivers, streams and underground sources has a direct impact on the condition of the water environment:

- **Too much water taken out** can make environmental conditions **worse**
- **Reducing the amount of water taken out** can **improve** the conditions of these environments

**The Environment Agency**



Companies can't just decide for themselves how much water they want to take and from where. **The Environment Agency closely monitor how much water is taken** by water companies at each location where it is taken from.

**The Environment Agency sets specific limits** for each company and each source of water to make sure that the environment is protected to at least a minimum level, but given that so few water environments are currently in good condition, more needs to be done in order to get these environments back into a better state

**Each water company must set out its environmental ambitions** within their Water Resources Management Plan and this is an area where customers can have an important voice over what the ambition should be

### Waste water



You may have heard in the news that some water companies have been fined for polluting rivers. Recently one company that handles wastewater was fined a record amount for illegally dumping sewage into waterways

It is important to **remember that 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 these types of pollution incidents



**South Staffs Water**

**NOT responsible for treating wastewater in your area**

However, even though South Staffs Water doesn't deal with wastewater they do have responsibilities for (and important choices to make) about the environment within their Water Resources Management Plan and how they treat the water to ensure it meets drinking water quality standards

## 3.6 Testing

Given that the survey materials were designed using learnings from extensive qualitative testing no cognitive testing was undertaken. A formal pilot of 50 interviews was conducted through the commercial panel Dynata. The pilot was used to test:

- the recruitment process
- the clarity and flow of the questionnaire
- the appropriateness of the language used
- the accuracy of all routings
- ease of use of the show material
- the interview duration
- the survey hit rate.

## 3.7 Analysis

Prior to the production of the first run of data report edits were conducted to check that the data are in the correct range, routing has been followed and to identify missing values. If any logical inconsistencies were found, forced edits were applied as appropriate and the logic of this forcing was documented in the syntax. Subsequent data runs established if the forcing has the desired effect. No data was assumed/imputed without the full knowledge of the client.

A codeframe for any open or other questions was drawn up by the Senior Coding Supervisor.

Standard question analysis was then undertaken using SPSS and output was in the form of frequencies (initially) and then simple data tabulations in Excel, as well as raw data in Excel format.

Checks of tabulations and other data outputs include:

- all tables are present and complete
- any abbreviations used accurately reflect the full content
- the correct base size is shown and the base correctly labelled
- cross breaks are checked against the source questions
- derived data are checked against their source
- subgroup and net totals are correct
- there are no blank tables
- any weighting is correct
- frequencies have been checked prior to running tabulations
- spelling is correct
- any statistical analysis used is appropriate and correct.

Additionally, the following was checked for data tables:

- the source question is included

- as the data was weighted, a description of the weighting method is included
- subgroups are clearly identified
- the base was shown clearly (for both weighted and unweighted data)
- the number and/or proportion of those giving a 'not stated' or 'don't know' response is shown
- any analysis variables and other statistical tests are shown clearly such as significance testing, indexing, scoring, scaling, calculation of means, standard deviations
- information on any data that has been suppressed to assure confidentiality.

Accent researchers use a message-led approach to analysis. This involves the following key steps:

- **Step 1: Data Assimilation** – reading through the data tabulations or frequencies and noting down the key findings as they relate to the research objectives
- **Step 2: Identifying the Key Message(s)** – using these findings to identify the key message(s) to be drawn from the research as they relate to the research objectives
- **Step 3: Identifying Other Useful/Interesting Data** – for example, any segments of the population where results are distinctly different, show key trends or patterns etc.
- **Step 4: Translating Messages into Actions** – concluding with a suggested set of actions for the client to focus upon based upon the research findings.

The main data breaks for this project were:

- Region (CAM cf SSW)
- Gender
- Social grade
- Meter status
- Age.

# 4Appendix A: MCDA Questionnaire



DP USE SAME BACKGROUND AS 3410 THROUGHOUT

**SSC SAMPLE ONLINE AND FACE TO FACE:** Thank you for agreeing to take part in this important study which is being conducted by Accent on behalf of South Staffs/Cambridge Water.

South Staffs/Cambridge Water would like to hear from customers to understand more about your views on how they should plan to maintain future water supplies in your region over the next 25 years. There are lots of options the company could look at and they are looking for your input to make sure customers' preferences are fully reflected in its plans.

We would really appreciate it if you could spare 15-20 minutes of your time to give your feedback - but it may take longer depending on the answers you give. The results will be used, alongside those of thousands of other customers across the region, to inform where South Staffs/Cambridge Water invests the money from bills.

Accent is a member of the Market Research Society and we operate in accordance with its Code of Conduct, which means the responses you give will be held securely and remain anonymous. There would be no follow-up contact resulting from doing this study unless you give permission to do so in your answers.

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 Love2Shop voucher, or as a donation to charity. We'll ask you which is your preferred option at the end of the [ONLINE study/ F2F interview]. You must complete all the questions in this study to be eligible to receive the £5 offer.

**COMMERCIAL PANEL: ENSURE NO COMPANY LOGO IS SHOWN:** Thank you very much for agreeing to complete this on-line study which is being conducted by Accent, an independent research agency

We just need to ask a few questions to check that you're eligible to take part in this research.

---

**Q1.** For the purposes of administering the study and for analysis, we may collect demographic information. You do not have to answer any questions that you do not wish to and if you do you can withdraw your consent for us to process this information at any time. Any personal data collected over the course of this [ONLINE study/ F2F 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/](http://www.accent-mr.com/privacy/).

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

Yes

No **THANK AND CLOSE**

---

**Q2. ASK CAPI ONLY. OTHERS GO TO Q6:** In line with government guidelines we have a few questions to check your Covid-19 status. Are you or anyone you have been in close contact with currently experiencing any flu-like symptoms or other Covid-19 symptoms?

**INTERVIEWER NOTE: THIS WOULD INCLUDE HIGH TEMPERATURE AND/OR LOSS OF SENSE OF TASTE OR SMELL**

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q3. Have you or anyone you have been in close contact with been diagnosed with Covid-19 within the past two weeks, and not subsequently tested negative

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q4. Are you someone who is defined as either Clinically Extremely Vulnerable or Clinically Vulnerable?  
**INTERVIEWER NOTE: THEY WILL HAVE BEEN INFORMED OF THIS STATUS EARLY ON IN LOCKDOWN**

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q5. Are you currently shielding to protect yourself from Covid-19 or caring for someone else who is especially vulnerable to Covid-19?

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q6. Do you or any of your close family work in market research or for a water company **SSC SAMPLE AND CAPI ONLY:** (including working for South Staffs Water or Cambridge Water)? **SINGLE CODE**

Yes **THANK & CLOSE**  
No

---

Q7. **ASK ALL:** What's the first half of your postcode? We will only use this to check who provides your water.

<b>South Staffs:</b>	<b>Cambridge Water:</b>
B	CB
DE	
DY	
ST	PE
WS	SG
WV	
CV	

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

---

Q8. **ASK ALL:** Are you in paid employment?

Yes  
No **GO TO Q14**

---

Q9. **ASK IF Q8 = 1** How much involvement, if any, do you have in managing the water bills for your business?

I solely or jointly manage the water bills **GO TO Q10**

I don't have any involvement in the water bills **GO TO Q14**

We do not have a mains water supply / do not receive a separate water bill as it is included with other bills **GO TO Error! Reference source not found.**

---

Q10. Are you a sole trader working from home and with no separate business premises?

I am a sole trader and have no separate business premises **GO TO Q14**

I work in a separate business premises

---

Q11. How many sites does your organisation have in the UK; one or more than one?

One site

More than one site

Don't know

---

Q12. **SHOW IF Q11 = 1** Is this site **SHOW IF Q11=2-3** "Are any of these sites" in any of the areas supplied with clean water services by South Staffs Water/Cambridge Water (please use the map below for reference)?

Yes

No **CODE AS HH, SHOW TEXT BELOW AND THEN GO TO Q14**

Don't know **CODE AS HH, SHOW TEXT BELOW AND THEN GO TO Q14**

**IF Q12 = 2 OR 3** We would like you to respond to this study as a household customer of Q7

---

Q13. **ASK IF Q12=1** We need to check that we are gaining feedback from people working for organisations with premises in specific areas. Please can you tell me the first half of the postcode of the site in the areas supplied by South Staffs Water/Cambridge Water?

**DP: PLEASE CREATE DROP DOWN LOOK UP FOR POSTCODE CHECK.**

**USE POSTCODES SHOWN IN COLUMN X OF X AS THE LOOK UP. DO NOT CREATE BOX FOR 2ND HALF OF POSTCODE**

Prefer not to answer **CODE AS HH AND GO TO Q14**

None of the above **CODE AS HH AND GO TO Q14**

---

**IF IT DOES MATCH, SHOW FOLLOWING AND THEN GO TO MAIN QUESTIONNAIRE:** Thank you, [F2F I/ONLINE we] can confirm that South Staffs Water/Cambridge Water is responsible for the provision of water services in your organisation's area.

When thinking about your answers, please respond from the perspective of your organisation's preferences and needs, rather than as what is important to you when thinking about the supply of water to your home.

**IF CONFIRMED POSTCODE DOES NOT MATCH LOOK UP CONTINUE AS HH CUSTOMER**

---

Q14. 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**

---

Q15. Which of the following age groups do you fall into? Are you... **SINGLE CODE**

Under 18 **THANK AND CLOSE**

18 to 24

25 to 29

30 to 34

35 to 44

45 to 49

50 to 54

55 to 64

65 to 74

75 or over

Prefer not to say

FUTURE CUSTOMER = Q15= CODE 2 OR 3 AND Q14= CODES 3 OR 4

---

Q16. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- Higher managerial/ professional/ administrative (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 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.)
- Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- Skilled manual worker (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, pub/bar worker etc.)
- Semi or unskilled manual worker (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- Student
- Unemployed or not working due to long-term sickness
- Casual worker – not in permanent employment
- Full-time carer of other household member
- Retired
- Rather not say **THANK AND CLOSE ONLY DYNATA**

---

Q17. **IF Q16=10 (RETIRED). OTHERS GO TO Q19:** Does the main income earner have a state pension, a private pension or both?

State only

Private only

Both

---

Q18. **IF Q17 = PRIVATE OR BOTH. OTHERS GO TO Q19:** How would you describe the main income earner's occupation before retirement?

- Senior managerial or professional (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- Intermediate managerial, administrative or professional (e.g. Solicitor, Board Director of small organisation, middle manager in large organisation, principle officer in civil service / local government etc.)

- Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- Manual worker (with industry qualifications) (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, pub / bar worker etc.)
- Manual worker (with no qualifications) (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- None of these

---

**Q19. SEG: CODE AS FOLLOWS:**

IF Q16= 1 or 2; SEG = AB

IF Q16 = 3; SEG = C1

IF Q16 = 4; SEG = C2

IF Q16 = 5-9; SEG = DE

IF Q16 = 10 and Q17= State only; SEG = DE

IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 1 or 2; SEG = AB

IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 3; SEG = C1

IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 4; SEG = C2

IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 5; SEG = DE

---

**Q20. Are you:**

Male

Female

Prefer to self-identify

Prefer not to say

---

**Q21. ASK ALL: Do you have a water meter at your [HH] home [NHH] organisation?**

Yes – I/we asked to have one installed

Yes – it was already in the property when I/we moved in

Yes – I/we had to have it fitted, but I/we didn't really want it installed

No – and I/we not interested in getting one

No – but I/we are considering getting one

No – I/we had one, but decided to opt out

Don't Know

## Thanks, you're good to go

This research study is being conducted for your water company, South Staffs Water/Cambridge Water. The company is only responsible for the clean water services to your [HH] home [NHH] organisation, that's the water that comes through your taps. It is not responsible for your sewerage services, which are provided by Severn Trent Water (IF SOUTH STAFFS CUSTOMER)/Anglian Water (IF CAMBRIDGE WATER CUSTOMER).

**SSC SAMPLE ONLY:** Remember, if you fully complete the survey, we'd like to provide you with £5 which you can accept either as a Love2Shop 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.

---

Q22. [HH] 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.

[NHH] Taking into account all aspects of the wholesale service provided, how satisfied would you say you are with the overall service provided by South Staffs Water / Cambridge Water? This could include things like the reliability of the water supply, how quickly leaks in the public highway are fixed and the quality of the water supply itself.

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

---

Q23. **ONLINE PANEL ONLY:** 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

---

Q24. How much [HH] do you [NHH does your organisation] pay for your total water bill – that's the amount for your water and sewerage services? Please select "per month" or "per year" along with your amount.

Per month/Per year      **GO TO Q26**  
I'm not sure  
I prefer not to say

---

Q25. HH: Which of the following bands do you estimate that your total bill for water falls into – that's the amount for your water and sewerage services? The month amounts assume that the bills are paid evenly over a 12-month period, but some customers pay over a different number of months.

SINGLE CODE

Monthly	Annual
Less than £13 per month	Less than £150 per year
£13 - £16 per month	£151 - £200 per year

£17 - £20 per month	£201 - £250 per year
£21 - £24 per month	£251 - £300 per year
£25 - £28 per month	£301 - £350 per year
£29 - £32 per month	£351 - £400 per year
£33 - £37 per month	£401 - £450 per year
£38 - £41 per month	£451 - £500 per year
£42 - £45 per month	£501 - £550 per year
£46 - £50 per month	£551 - £600 per year
£50 - £54 per month	£601 - £650 per year
£55 - £59 per month	£651 - £700 per year
£60 - £64 per month	£701 - £750 per year
£65 - £69 per month	£751 - £800 per year
Over £70 per month	Over £800 per year
I'm not sure	
Prefer not to say	

NHH: Approximately what is your business's average annual water and sewerage services bill?

SINGLE CODE

Less than £500 per year  
£500 to £1,499 per year  
£1,500 to £2,999 per year  
£3,000 to £9,999 per year  
£10,000 to £14,999 per year  
£15,000 to 29,999 per year  
£30,000 to £49,999 per year  
£50,000 or more per year  
Don't know

---

Q26. Bill calculation:

**USE ANNUAL AMOUNT FROM Q24**

**USE MONTHLY AMOUNT X 12 FROM Q24**

**USE MID POINT OF RANGE ANNUAL AMOUNT FROM Q25**

**USE MID POINT OF RANGE MONTHLY AMOUNT X 12 FROM Q25**

**SHOW REGIONAL AVERAGE IF NONE OF THE ABOVE APPLIES: SSW: £332/CAM: £375**

---

Q27. **ONLINE PANEL ONLY & HH ONLY, NHH GO TO Q25:** How satisfied are you with the **value for money** of the clean water services you receive?

**DP ADD HORIZONTAL SCALE LIKE Q22**

Very dissatisfied

Fairly dissatisfied

Neither satisfied nor dissatisfied

Fairly satisfied

Very satisfied

Don't know

---

Q28. Have you experienced any of the following in the last 2 to 3 years? **MULTICODE**

Had to raise a query about your water bill

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**

## The Natural Environment

We would like to now find out a bit more about your views about the environment.

**Q29.** When did you last visit rivers, lakes or reservoirs in your area for recreational purposes e.g. walking, cycling, fishing, swimming?

- Within the last year
- 1-3 years ago
- More than 3 years ago
- Never
- I'm not sure

**Q30.** How much do you agree or disagree with the following statements:

**ROTATE**

RESPONSE CODES 0=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDE DON'T KNOW

Protecting lakes, rivers, reservoirs, fish and other aquatic plants and wildlife is really important to me

I am concerned about the impact of climate change on the natural environment in my area

ONLINE PANEL ONLY: I do more to save energy than I do to save water in my home

I worry about the amount of water available for use in my local area

ONLINE PANEL ONLY: I don't think much about saving water, I just take it for granted really

## South Staffs/Cambridge Water's Water Resources Management Plan

Please read the following information which provides some background on South Staffs/Cambridge Water and the water cycle. There is a minimum time for each slide to ensure the information is read. But there is no maximum time so please don't feel you need to rush!

**SLIDES 1 TO 6:**

SSW: [3495stim01\\_theme2\\_v9.pptx](#)

CAM: [3495stim01\\_theme2\\_v2 CAM.pptx](#)

We are asking for your opinions as it's important to South Staffs/Cambridge Water to hear customers' views when making important decisions. For really big decisions there is also a requirement from the water regulators, like Ofwat and the Environment Agency that customers are consulted to find out if they support large investment decisions.

**Q31. ONLINE PANEL ONLY:** Is the information about why South Staffs/ Cambridge Water are asking for your views clear and easy to understand?

- Yes – very easy to understand



- Yes – quite easy to understand
- No – quite difficult to understand
- No – very difficult to understand
- Don't know

**Q32. ONLINE PANEL ONLY: ASK IF CODE 3 OR 4. OTHERS GO TO PRIORITIES FOR INVESTMENT:** What do you find difficult to understand? Please write in as much information as possible

## Your Views About Planning for the Future

**Q33.** In developing its plans, South Staffs Water/Cambridge Water has to balance the needs of customers, stakeholders (like environmental groups and councils) and the water environment. We'd like to understand your initial reaction to some key balances in terms of the company's general approach to planning and where you stand on each.

Please indicate the point on the scale that that most closely reflects how you feel:

**ROTATE  
7 POINT SLIDER SCALE**

Investing more now for the long-term future even if it costs customers more/Keeping customer bills as low as possible  
 ONLINE PANEL ONLY: Trying new approaches and innovations to find solutions to challenges/Sticking to tried and trusted approaches that are proven to work

Looking after the needs of the natural environment first, by not taking too much water out of rivers/streams or underground sources/Ensuring all customers have all the water they want to use at an affordable price

ONLINE PANEL ONLY: Doing more to reduce the amount of leakage from pipes even if it costs customers more/Keeping customer bills as low as possible

ONLINE PANEL ONLY: Doing more to reduce the company's 'carbon footprint' (the amount of carbon dioxide the company adds to the atmosphere through its operations) – even if it costs customers more/Keeping customer bills as low as possible

Doing more to reduce the amount of water customers use – even if it costs more/Keeping customer bills as low as possible

**Q34. ONLINE PANEL ONLY:** On a scale of 1-10 how concerned are you about the following in the area where [HH] you live [NHH] your organisation is located?

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

Reducing carbon emissions

Flooding

Covid-19 pandemic continuing

Poverty and inequality

Level of pollution – e.g. air, water

Unemployment levels

Future gas supplies and prices

Future water supplies and prices

## Priorities for Investment – Water Supply Options

Part of South Staffs/Cambridge Water's role is to ensure that there is a sufficient supply of water to meet demand, and to take action to ensure that it maintains supplies during events such as extreme droughts.

You are about to be shown [SSW] 10 different options that South Staffs [CAM] 9 different options that Cambridge Water is thinking about in its plans to ensure that there is a sufficient supply of water to meet demand over the next 25 years. Each one will be displayed like the one shown on the next screen.

**INSERT EXAMPLE SHOWCARD WALK THROUGH GIF – DP SLOW DOWN GIF AND ADD A ‘PLAY’ BUTTON FOR CUSTOMERS TO START THE GIF AFTER THEY HAVE READ THE TEXT ABOVE**

Please read the information which provides some background on [SSW] 10 different options that South Staffs [CAM] 9 different options that Cambridge Water could consider in order to maintain the water supply for your area. Please click the forward arrow once done.

Please familiarise yourself with this and then press the forward arrow to read about the other options.

**DP: ROTATE ORDER OF SHOWCARD OPTIONS SHOWN TO EACH CUSTOMER**

**DP: EACH SLIDE NEEDS A MINIMUM TIME OF 8 SECONDS BEFORE PARTICIPANT CAN MOVE ON**

NEXT PAGE

Here is a summary of the [SSW] ten [CAM] nine options you have just seen. On the next screen we will ask you which ones you like the best.

**DP ADD SLIDE 18 FROM STIM – REMOVE FROM Q35**

---

**Q35. Taking into account the different impacts that each of these options has, which would you pick as a priority for South Staffs/Cambridge Water to invest in to maintain water supplies in the region over the next 25 years [NHH] for your organisation?**

Please rank your top three by dragging the option into the boxes and order these with the one you prefer the most at the top of the list. You can change your choices if you want by dragging an option out of the box and adding another one in.

You can click or hover over the ‘i’ button at any time to see all the options again before you make your choices. **DP: THE “I” BUTTON TEXT SHOULD SHOW THE RELEVANT SLIDE**

**SSW:**

- Transfer water in from other regions
- Take more water from under the ground
- Take more water from rivers
- Increase the size of existing reservoirs
- Recycle or ‘re-use’ water at homes/businesses
- Recycle or ‘re-use’ waste water indirectly
- Reduce leakage by 50% by 2050
- Reduce water use through education and advice
- Reduce water use through universal water metering
- Impose regular restrictions on customers’ use of water

**CAM:**

- Transfer water in from other regions
- Take more water from under the ground
- Build a new regional storage reservoir
- Recycle or ‘re-use’ water at homes/businesses
- Recycle or ‘re-use’ waste water indirectly
- Reduce leakage by 50% by 2050
- Reduce water use through education and advice

Reduce water use through universal water metering  
Impose regular restrictions on customers' use of water

**DP: CLICK AND DRAG – NEED TO ENSURE ONLY ONE OPTION CAN BE ADDED TO EACH OPTION BOX  
ROTATE IN SAME ORDER AS SHOW CARDS**

---

Q36. Why have you picked Q35 as your top choice? Please provide as much detail as possible.

---

Q37. What things were you thinking about when you made your decisions on which options you preferred?

## Options for the Water Resources Plan

South Staffs/Cambridge Water's Water Resources Management Plan will need to include a combination of options to make sure there is enough water for the region.

But they also need to develop a plan that is best value. This means the plan has wider positive impacts, including:

- making the water environment better – e.g. rivers
- making investments that benefit communities and wider society
- ensuring that water bills remain affordable.

The best value plan might not be the cheapest way to secure future water supplies, which is why getting customers' input is so important.

**SSW PARTICIPANTS SHOW:** South Staffs Water is also working closely with the other three water companies in the West of England region to make the best decisions. **CAM PARTICIPANTS SHOW:** Cambridge Water is also working closely with the other three water companies in the East of England region to make the best decisions.

NEXT PAGE:

In the next exercise you'll be shown a series of 8 questions, each offering a pair of different possible options for the plan. We want to understand which one you would prefer based on the information shown to help South Staffs/Cambridge Water make the decisions. An example is shown below:

**DP: INSERT WALK THROUGH GIF**

Please familiarise yourself with this and then press 'next' to read about the other options.

NEW PAGE:

As you've just seen one of the impacts relates to the change in your water bill. In some options there will be no increase to your bill while in others there will be an increase.

When choosing which option you prefer in each case, please consider:

- Whether the impacts shown are important to [HH: you/NHH: your organisation]; and

- Your [HH: household/NHH: organisation] overall income and expenses, remembering that:
- Any money [HH: you pay/NHH: your organisation pays] for these improvements will not be available for [HH: you/NHH: your organisation] to spend elsewhere
- Other [HH: household/NHH: organisation] bills may go up or down affecting the amount of money [HH: you have/NHH: your organisation has] to spend in general

---

Q38. Your [HH: household/NHH: organisation's] bills will also be affected by the rate of inflation [DP: **INSERT I BUTTON SHOWING THE FOLLOWING TEXT:** Inflation means that the general level of prices are going up. More money will need to be paid for goods (like a loaf of bread or petrol) and services (like getting a haircut at the hairdresser). The current rate of inflation is 3.8%. Wages should also rise at a similar pace.] each year.

---

Q39. Choice 1

---

Q40. Why did you select this option? Please write in as much information as possible. Please use the back button to remind yourself of the choice if needed.

---

Q41. Choice 2

---

Q42. Choice 3

---

Q43. Choice 4

---

Q44. Choice 5

---

Q45. Choice 6

---

Q46. Choice 7

---

Q47. Choice 8

---

Q48. Having been through that exercise, did you feel able to make comparisons between the choices that were presented to you?

- Yes
- No

---

Q49. Why weren't you able to make comparison between the choices presented to you?

## 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 its water services in the future. The answers you give will be kept confidential, unless you give permission to share them at the end of the survey.

---

Q50. **HH ONLY. NHH GO TO Q65:** 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 (eg: gas/electricity, insurance) every year to get the best price

Q51. 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

Q52. Which of the following statements applies to you over the last 12 months? Please select all that apply

ROTATE: APART FROM NONE OF THE ABOVE

- I am an active member of an environmental/conservation group or local initiative protect and improve the environment - e.g. Friends of the Earth, World Wildlife Fund, Extinction Rebellion, volunteering time or expertise to local causes
- I actively encourage family/friends/colleagues to be more environmentally conscious
- I have lobbied politicians and/or signed petitions on environmental topics
- None of the above

Q53. 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.

- Yes
- No
- Prefer not to say
- Don't know

Q54. A lot of people struggle to pay their household bills. 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	<b>STRUGGLING</b>
3	I sometimes pay my water bill late	<b>STRUGGLING</b>
4	I often find it difficult to pay my water bill on time	<b>IN DEBT</b>
5	I am rarely, or never, able to pay my water bill on time	<b>IN DEBT</b>
6	Prefer not to answer	

Q55. 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 £315	Under £16,380
B1	£316-£442	£16,381 - £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
---	-------------------

Q56. Do you/your partner or other members of your household receive any benefits or tax credits?

1	Yes, myself	<b>ON BENEFITS</b>
2	Yes, someone in my household	
3	No	
4	Prefer not to say	

Q57. **ONLINE PANEL ONLY:** Thinking about all the people in your household, including yourself, how many people live here permanently for each of these age groups? **IF THERE ARE NO PEOPLE IN YOUR HOUSEHOLD BELONGING TO A CERTAIN AGE GROUP, PLEASE SELECT 'ZERO' FOR IT.**

Up to 15 years	.....0.....	1.....	2.....	3.....	4.....	5+
16 to 65 years	.....0.....	1.....	2.....	3.....	4.....	5+
Over 65 years	.....0.....	1.....	2.....	3.....	4.....	5+
Prefer not to say						

Q58. Which of these ethnic groups do you consider you belong to?

**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

Q59. **ASK NHH ONLY:** Could you please tell me how many employees your organisation has? If you have more than one office/site/staff working from home, please count all of them in your answer. **SINGLE CODE**

- 1 (Sole trader)
- 2 – 4
- 5 – 9
- 10 - 19

20 - 49  
50 - 99  
100 - 249  
250 - 499  
500 - 999  
1,000 +  
Don't know

---

**Q60. ASK NHH ONLY:** What business sector best defines the main activity of your organisation?

- Agriculture, forestry and fishing
- Mining, quarrying
- Utilities and Energy (including electricity, gas, steam and air-conditioning supply)
- Water supply, sewerage and waste management, recycling
- Food, Drink and Tobacco Manufacturers and Other Manufacturing
- Construction (including plumbing, painting, electrical etc)
- Retail (NOT hairdressing), Wholesale, Motor Trades including vehicle repair
- Transport and Storage (including freight, taxis, airlines, bus, rail and warehousing, post offices)
- Hotel, catering, Camp sites, restaurants, cafes, accommodation, pubs
- Information, Telecommunications (including computer, newspaper, radio, TV, news agency, book publishing)
- Banking, Finance, Insurance
- Real estate and property activities
- Professional, scientific and technical activities
- Business Admin and support services (including cleaning, gardening, employment agencies, office services)
- Education (including schools, universities)
- Health and social work (including hospitals, doctors, dentists, charities, nursing care)
- Government and Defence
- Arts, Recreation, Entertainment (including Libraries, theatres, museums, zoos, sport centres, fitness)
- Other service activities (including Trade Unions, Churches, Repair services, Funeral-related services, Hairdressers)
- Other, please specify
- Prefer not to answer

---

**Q61. ASK NHH ONLY:** How essential would you say the supply of water is to the day-to-day running of your business?

Not at all essential  
Not essential  
Neither not essential nor essential  
Essential  
Absolutely essential  
Don't know

---

**Q62. SSC SAMPLE HH ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H<sub>2</sub>Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*

Yes  
No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with 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.

---

Q63. Would you like to see the results of the study and how South Staffs Water / Cambridge Water is using customers' feedback to help shape its plans? This information will be available to share from Summer 2022 and a link will be sent to you by e-mail.

Yes  
No

---

Q64. **DYNATA SAMPLE HH ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H<sub>2</sub>Online. The community allows 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. 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>

---

Q65. **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

---

Q66. **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**

Yes  
No

---

Q67. **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 UK stores  
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:**



# 5 Appendix B: Themes 1&3 Questionnaire

DP USE SAME BACKGROUND AS 3410 THROUGHOUT

**SSC SAMPLE ONLINE AND FACE TO FACE:** Thank you for agreeing to take part in this important study which is being conducted by Accent on behalf of South Staffs/Cambridge Water The company would like to understand customers' views on how it should plan to maintain future water supplies in your region over the next 25 years. There are lots of options the company could look at and they are looking for your input to make sure customers' preferences are fully reflected in its plans.

We would really appreciate it if you could spare 15-20 minutes of your time to give your feedback - but it may take longer depending on the answers you give.

As a thank you we'd like to provide you with £5, which you can accept either as a Love2Shop voucher, or as a donation to charity. We'll ask you which is your preferred option at the end of the [ONLINE study/ F2F interview]. You must complete all the questions in this study to be eligible to receive the £5 offer.

**COMMERCIAL PANEL: ENSURE NO COMPANY LOGO IS SHOWN:** Thank you very much for agreeing to complete this on-line study which is being conducted by Accent, an independent research agency

We just need to ask a few questions to check that you're eligible to take part in this research.

---

Q1. Any personal data collected over the course of this [ONLINE study/ F2F 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/](http://www.accent-mr.com/privacy/).

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

Yes

No **THANK AND CLOSE**

Q1a Have you completed any surveys on behalf of South Staffs Water or Cambridge Water in the last 6 months?

Yes **THANK AND CLOSE**

No

---

Q2. **ASK CAPI ONLY. OTHERS GO TO Q6:** In line with government guidelines we have a few questions to check your Covid-19 status. Are you or anyone you have been in close contact with currently experiencing any flu-like symptoms or other Covid-19 symptoms?

**INTERVIEWER NOTE: THIS WOULD INCLUDE HIGH TEMPERATURE AND/OR LOSS OF SENSE OF TASTE OR SMELL**

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.

Thank you for your time

No

---

Q3. Have you or anyone you have been in close contact with been diagnosed with Covid-19 within the past two weeks, and not subsequently tested negative

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q4. Are you someone who is defined as either Clinically Extremely Vulnerable or Clinically Vulnerable?  
**INTERVIEWER NOTE: THEY WILL HAVE BEEN INFORMED OF THIS STATUS EARLY ON IN LOCKDOWN**

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q5. Are you currently shielding to protect yourself from Covid-19 or caring for someone else who is especially vulnerable to Covid-19?

Yes **THANK AND CLOSE** On this occasion we will not be able to continue with the survey due to Covid-19 guidelines.  
Thank you for your time  
No

---

Q6. Do you or any of your close family work in market research or for a water company **SSC SAMPLE AND CAPI ONLY: (including working for South Staffs Water or Cambridge Water)? SINGLE CODE**

Yes **THANK & CLOSE**  
No

---

Q7. **ASK ALL:** What's the first half of your postcode? For example if your full postcode is CB1 1NE, please just tell CAPI: me **ONLINE:** us the first part i.e. CB1. We will only use this to check who provides your water.

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

---

Q8. **ASK ALL:** Are you in paid employment or do you own a business?

Yes  
No **GO TO Q14**

---

Q9. **ASK IF Q8 = 1** How much involvement, if any, do you have in managing the water bills for your business?

I solely or jointly manage the water bills **GO TO Q10**  
I don't have any involvement in the water bills **GO TO Q14**  
We do not have a mains water supply / do not receive a separate water bill as it is included with other bills **GO TO Q14**

---

Q10. Are you a sole trader working from home and with no separate business premises?

I am a sole trader and have no separate business premises **GO TO Q14**  
I work in a separate business premises

---

Q11. How many sites does your organisation have in the UK; one or more than one?

One site  
More than one site  
Don't know

---

Q12. **SHOW IF Q11 = 1** Is this site **SHOW if Q11=2-3** "Are any of these sites" in any of the areas supplied with clean water services by South Staffs Water (please use the map below for reference)?

Yes  
No **CODE AS HH, SHOW TEXT BELOW AND THEN GO TO Q14**  
Don't know **CODE AS HH, SHOW TEXT BELOW AND THEN GO TO Q14**

**IF Q12 = 2 OR 3** We would like you to respond to this study as a household customer of Q7

---

Q13. **ASK IF Q12=1** We need to check that we are gaining feedback from people working for organisations with premises in specific areas. Please can you tell me the first part of the postcode **SHOW IF Q11 = 1: 'ONE SITE' OR 3: 'DON'T KNOW'** of the site in the areas supplied by South Staffs or Cambridge Water? **SHOW IF Q12 = 2 'MORE THAN ONE SITE'** of any one of the sites you have in the areas supplied by South Staffs or Cambridge Water? **SHOW ALL** For example if your full postcode is CB1 1NE, please just tell me the first part i.e. CB1.

**DP: PLEASE CREATE DROP DOWN LOOK UP FOR POSTCODE CHECK.**  
**USE POSTCODES SHOWN IN COLUMN X OF X AS THE LOOK UP. DO NOT CREATE BOX FOR 2ND HALF OF POSTCODE**

Prefer not to answer **CODE AS HH AND GO TO Q14**  
None of the above **CODE AS HH AND GO TO Q14**

---

**IF IT DOES MATCH, SHOW FOLLOWING AND THEN GO TO MAIN QUESTIONNAIRE:** Thank you, [F2F I/ONLINE we] can confirm that South Staffs Water/Cambridge Water is responsible for the provision of water services in your organisation's area.

When thinking about your answers, please respond from the perspective of your organisation's preferences and needs, rather than as what is important to you when thinking about the supply of water to your home.

**IF CONFIRMED POSTCODE DOES NOT MATCH LOOK UP CONTINUE AS HH CUSTOMER**

---

Q14. 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**

---

Q15. Which of the following age groups do you fall into? Are you... **SINGLE CODE**

Under 18 **THANK AND CLOSE**  
18 to 24  
25 to 29  
30 to 34  
35 to 44  
45 to 49

50 to 54  
55 to 64  
65 to 74  
75 or over  
Prefer not to say

NON BILL PAYER Q14= CODES 3 OR 4

---

Q16. Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- Higher managerial/ professional/ administrative (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 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.)
- Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- Skilled manual worker (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, pub/bar worker etc.)
- Semi or unskilled manual worker (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- Student
- Unemployed or not working due to long-term sickness
- Casual worker – not in permanent employment
- Full-time carer of other household member
- Retired
- Rather not say **THANK AND CLOSE ONLY DYNATA**

---

Q17. **IF Q16=10 (RETIRED). OTHERS GO TO Q19:** Does the main income earner have a state pension, a private pension or both?

State only  
Private only  
Both

---

Q18. **IF Q17 = PRIVATE OR BOTH. OTHERS GO TO Q19:** How would you describe the main income earner's occupation before retirement?

- Senior managerial or professional (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- Intermediate managerial, administrative or professional (e.g. Solicitor, Board Director of small organisation, middle manager in large organisation, principle officer in civil service / local government etc.)
- Supervisor; clerical; junior managerial administrative or professional (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- Manual worker (with industry qualifications) (e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, pub / bar worker etc.)
- Manual worker (with no qualifications) (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- None of these

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Q19. **SEG: CODE AS FOLLOWS:**

IF Q16= 1 or 2; SEG = AB  
IF Q16 = 3; SEG = C1

IF Q16 = 4; SEG = C2  
IF Q16 = 5-9; SEG = DE

IF Q16 = 10 and Q17= State only; SEG = DE

IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 1 or 2; SEG = AB  
IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 3; SEG = C1  
IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 4; SEG = C2  
IF Q16 = 10 and Q17 = Private only OR Both and Q18 = 5; SEG = DE

---

Q20. How do you prefer to identify?

Male  
Female  
Prefer to self-identify  
Prefer not to say

---

Q21. **ASK ALL:** Do you have a water meter at your [HH] home [NHH] organisation?

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

## Thanks, you're good to go

This research study is being conducted for your water company, South Staffs Water/Cambridge Water. The company is only responsible for the clean water services to your [HH] home [NHH] organisation, that's the water that comes through your taps. It is not responsible for your sewerage services, which are provided by Severn Trent Water (IF SOUTH STAFFS CUSTOMER)/Anglian Water (IF CAMBRIDGE WATER CUSTOMER).

**SSC SAMPLE ONLY:** Remember, if you fully complete the survey, we'd like to provide you with £5 which you can accept either as a Love2Shop 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.

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Q22. **[HH]** 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.

**[NHH]** Taking into account all aspects of the wholesale service provided, how satisfied would you say you are with the overall service provided by South Staffs Water / Cambridge Water? The wholesale service includes things like the reliability of the water supply, how quickly leaks in the public highway are fixed and the quality of the water supply itself, but does NOT cover customer service, meter readings and anything relating to your bills.

**RESPONSE CODES: 0=Extremely satisfied/5=Neither satisfied nor dissatisfied/10=Extremely satisfied/11=Don't know**

---

Q23. **ONLINE PANEL ONLY:** This time, using a 10-point scale, how much do you **trust** South Staffs Water/Cambridge Water?

**RESPONSE CODES: 1= I DON'T TRUST THEM AT ALL/10=I TRUST THEM COMPLETELY /11=DON'T KNOW**

---

Q24. **ONLINE PANEL ONLY & HH ONLY, NHH GO TO Q25:** How satisfied are you with the **value for money** of the clean water services you receive?

**DP ADD HORIZONTAL SCALE LIKE Q22**

Very dissatisfied

Fairly dissatisfied

Neither satisfied nor dissatisfied

Fairly satisfied

Very satisfied

Don't know

---

Q25. 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 a query about your water bill**

**Had 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**

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## The Natural Environment

We would like to now find out a bit more about your views about the environment.

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Q26. When did you last visit rivers, lakes or reservoirs in your area for recreational purposes e.g. walking, cycling, fishing, swimming?

Within the last year

1-3 years ago

More than 3 years ago

Never

I'm not sure

---

Q27. How much do you agree or disagree with the following statements:

**ROTATE**

**RESPONSE CODES 0=STRONGLY DISAGREE/10=STRONGLY AGREE. INCLUDE DON'T KNOW**

**IF MOBILE ADD:** Please rotate your device to horizontal position to see all options

Protecting lakes, rivers, reservoirs, fish and other aquatic plants and wildlife is really important to me

I am concerned about the impact of climate change on the natural environment in my area

---

I do more to save energy than I do to save water in my home  
I worry about the amount of water available for use in my local area  
I don't think much about saving water, I just take it for granted really

## South Staffs/Cambridge Water's Water Resources Management Plan

Please read the following information which provides some background on South Staffs/Cambridge Water and the water cycle. There is a minimum time for each slide to ensure the information is read. But there is no maximum time so please don't feel you need to rush!

### SLIDES 1 TO 6:

We are asking for your opinions as it's important to South Staffs/Cambridge Water to hear customers' views when making important decisions. For really big decisions there is also a requirement from the water regulators, like Ofwat and the Environment Agency, that customers are consulted to find out if they support large investment decisions.

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**Q28. ONLINE PANEL ONLY:** Is the information about why South Staffs/ Cambridge Water are asking for your views clear and easy to understand?

Yes – very easy to understand  
Yes – quite easy to understand  
No – quite difficult to understand  
No – very difficult to understand  
Don't know

---

**Q29. ONLINE PANEL ONLY: ASK IF CODE 3 OR 4. OTHERS GO TO YOUR VIEWS ABOUT PLANNING FOR THE FUTURE:** What do you find difficult to understand? Please write in as much information as possible

## Your Views About Planning for the Future

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**Q30.** In developing its plans, South Staffs Water/Cambridge Water has to balance the needs of customers, stakeholders (like environmental groups and councils) and the water environment. We'd like to understand your initial reaction to some key trade-offs in terms of the company's general approach to planning and where you stand on each.

Please indicate the point on the scale that that most closely reflects how you feel:

**ROTATE  
7 POINT SLIDER SCALE**

Investing more now for the long-term future even if it costs customers more/Keeping customer bills as low as possible  
ONLINE PANEL ONLY: Trying new approaches and innovations to find solutions to challenges/Sticking to tried and trusted approaches that are proven to work

Looking after the needs of the natural environment first, by not taking too much water out of rivers/streams or underground sources/Ensuring all customers have all the water they want to use at an affordable price

ONLINE PANEL ONLY: Doing more to reduce the amount of leakage from pipes even if it costs customers more/Keeping customer bills as low as possible



ONLINE PANEL ONLY: Doing more to reduce the company’s ‘carbon footprint’ (the amount of carbon dioxide the company adds to the atmosphere through its operations) – even if it costs customers more/Keeping customer bills as low as possible  
Doing more to reduce the amount of water customers use – even if it costs more/Keeping customer bills as low as possible

---

Q31. **ONLINE PANEL ONLY:** On a scale of 1-10 how concerned are you about the following in the area where [HH] you live [NHH] your organisation is located?

**ROTATE**

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

- Level of carbon emissions
- Flooding
- Covid-19 pandemic continuing
- Poverty and inequality
- Level of pollution – e.g. air, water
- Unemployment levels
- Future gas supplies and prices
- Future water supplies and prices

## Managing Droughts

We now want to ask you for your thoughts on a few important areas of South Staffs/Cambridge Water’s Water Resources Management Plan. The first area is about what the company should do in periods of drought.

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Q32. A drought [**DP ADD INFO BUTTON OVER DROUGHT:** Droughts are different from a few days of hot weather (a heatwave) when there might be temporary problems getting enough water into supply for customers in periods of very high demand] is an extended period of time with very low rainfall. This leads to lower than expected water levels in **SSW SHOW:** rivers, reservoirs and groundwater in aquifers, **CAM SHOW:** underground aquifers, which is where your drinking water comes from.

When this happens water companies can introduce restrictions to ensure there’s enough water for essential use (such as bathing, drinking water, washing clothes, cooking). A temporary use ban (used to be referred to as a hosepipe ban) is a ban on non-essential uses such as washing the car or filling a paddling pool. These bans typically last for a few weeks, but some have run for many months. At present, South Staffs/Cambridge Water plan to ensure you will not experience a Temporary Use ban of any duration, more often than **SSW** once every 40 years **CAM** once every 20 years. **NHH:** They can also introduce restrictions for businesses to reduce demand. At present, South Staffs/Cambridge Water plan that non-essential use bans (e.g. washing windows, watering grounds are not allowed) of any length of time will occur no more than **SSW** once every 80 years **CAM** once in every 50 years.

In reality, the time between bans could be reasonably equally spaced, or there might be two in relatively quick succession, but then no more for a long period of time depending on weather patterns. The last temporary use ban in your region was in **SSW** 1976 **CAM** 1991/92.

What level of service for **HH** Temporary Use Bans **NHH** Non-Essential Use Bans would you want South Staffs/Cambridge Water to plan for in the future?

**SSW – HH (PULL DOWN LIST)**

They should bring one in every time there is a long period of dry weather and not view the ban as a service failure but view them as good way to protect the water environment and help ensure supplies are protected long-term

More frequently than once every 20 years – more likely than now

Once every 20 years – more likely than now

Once every 30 years – more likely than now

Once every 40 years – as now

Once every 50 years – less likely than now

Once every 60 years – less likely than now

Less frequently than once every 60 years – less likely than now

Not sure

**CAM – HH (PULL DOWN LIST)**

They should bring one in every time there is a long period of dry weather and not view the ban as a service failure but view them as good way to protect the water environment and help ensure supplies are protected long-term

More frequently than once every 10 years – more likely than now

Once every 10 years – more likely than now

Once every 15 years – more likely than now

Once every 20 years – as now

Once every 30 years – less likely than now

Once every 40 years – less likely than now

Less frequently than once every 40 years – less likely than now

Not sure

**SSW – NHH (PULL DOWN LIST)**

They should bring one in every time there is a long period of dry weather and not view the ban as a service failure but view them as good way to protect the water environment and help ensure supplies are protected long-term

More frequently than once every 40 years – more likely than now

Once every 40 years – more likely than now

Once every 60 years – more likely than now

Once every 80 years – as now

Once every 100 years – less likely than now

Once every 120 years – less likely than now

Less frequently than once every 120 years – less likely than now

Not sure

**CAM – NHH (PULL DOWN LIST)**

They should bring one in every time there is a long period of dry weather and not view the ban as a service failure but view them as good way to protect the water environment and help ensure supplies are protected long-term

More frequently than once every 30 years – more likely than now

Once every 30 years – more likely than now

Once every 40 years – more likely than now

Once every 50 years – as now

Once every 60 years – less likely than now

Once every 70 years – less likely than now

Less frequently than once every 70 years – less likely than now

Not sure

Q32a Why do you say this?

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Q33. At present, water companies are planning for the likelihood of an extreme drought that might involve restrictions (such as the deployment of mobile water tanks and standpipes in the street for people to queue at for drinking water) happening once every 200 years. How acceptable do you find this level of risk?

Very acceptable  
Acceptable  
Neither acceptable nor unacceptable  
Unacceptable  
Very unacceptable  
Don't know

We'll now show you some information about how droughts are defined and how water supplies are managed before asking your views on what actions you'd like South Staffs/Cambridge Water to take in the future.

## SLIDES 7 AND 8:

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**Q34.** The Environment Agency (the regulator who oversees these things) has recently told water companies to work together regionally to better manage water resources and have said they want all companies to reduce the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040. At present, the risk of an extreme drought that might involve such things as mobile water tanks having to be deployed is at 1 in 200 years.

Why should this matter to you as you won't be around in 500 years? Another way of thinking about it is that water companies have to plan for a severe drought that has a 1 in 500 chance of happening each year. To put that into context:

- That is a lot more likely than the odds of winning the National Lottery (1 in 45 million) or being struck by lightning (1 in 12 million)
- It is a bit less likely than having twins (1 in 250)

How strongly do you support or oppose the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040?

**RESPONSE CODES: STRONGLY SUPPORT, SUPPORT, NEITHER SUPPORT NOR OPPOSE, STRONG OPPOSE, STRONGLY OPPOSE. INCLUDE D/K**

---

**Q35.** South Staffs/Cambridge Water could aim to reduce the need for rota cuts and standpipes no more than once in every 500 years by 2040 more quickly. Which of the following most closely represents your view:

I support achieving the 2040 target

I would prefer South Staffs/Cambridge Water to achieve the target earlier than 2040 **INFO BUTTON TEXT:** If South Staffs/Cambridge Water were to aim for earlier than 2040 this may have an impact on customer bills going up higher or lead to a reduction of other initiatives planned in order to pay for the investments needed to do this

The 2040 target is meaningless and should be scrapped

Don't know?

---

**Q36. ASK IF CODE 2 AT Q35. OTHERS GO TO Q37:** By when would you want South Staffs/Cambridge Water to hit the target?

Before 2030

2030-2034

2035-2039

Other date – please write in:

---

**Q37.** Now that you've learnt more about the steps South Staffs/Cambridge Water could take in the event of a drought, how strongly do you support or oppose the following potential ways of reducing customer demand for water during periods of drought?

RESPONSE CODES: STRONGLY SUPPORT, SUPPORT, NEITHER SUPPORT NOR OPPOSE, STRONG OPPOSE, STRONGLY OPPOSE. INCLUDE D/K

**HH SHOW:** The use of temporary use bans every summer? **INFO BUTTON TEXT:** These used to be called 'hosepipe bans' but the name was changed because the restrictions aren't only about hosepipes. They restrict non-essential water use at home, like filling up paddling pool or hot tub and using a hosepipe to water the garden, wash a car, wash a patio

**NHH SHOW:** The use of a non-essential use ban every summer? **INFO BUTTON TEXT:** These restrict non-essential water used by businesses such as watering grounds, swimming pools, car washes, and garden centres.

The use of temporary use bans every summer during years where the amount of rainfall is well below average? **INFO BUTTON TEXT:** These used to be called 'hosepipe bans' but the name was changed because the restrictions aren't only about hosepipes. They restrict non-essential water use at home, like filling up paddling pool or hot tub and using a hosepipe to water the garden, wash a car, wash a patio

**NHH SHOW:** The use of a non-essential use ban every hot summer during years where the amount of rainfall is well below average? **INFO BUTTON TEXT:** These restrict non-essential water used by businesses such as watering grounds, swimming pools, car washes, and garden centres.

Bringing in higher charges for customers who use a lot of water during a period of drought? **INFO BUTTON TEXT:** To do this all customers would need to be metered and customers would have a target set for the total litres per day for their HH: property NHH: businesses. Any water used up to this target would be charged at the same rate that HH; people NHH: businesses pay now for a unit of water. If they go over this amount they are charged a higher rate for every additional unit of water used.

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**Q38. DP ROTATE RESPONSE SO THAT:**

**SSW HH PARTICIPANT 1 AND CAM PARTICIPANT 1 IS ASKED:** Why did you give this response in relation to the use of temporary use bans every summer? **SSW NHH PARTICIPANT 1 AND CAM NHH PARTICIPANT 1 IS ASKED:** Why did you give this response in relation to the use of non-essential use bans every summer?

**SSW HH PARTICIPANT 2 AND CAM PARTICIPANT 2 IS ASKED:** Why did you give this response in relation to the use of temporary use bans every hot summer during years where the amount of rainfall is well below average? **SSW NHH PARTICIPANT 2 AND CAM NHH PARTICIPANT 2 IS ASKED:** Why did you give this response in relation to the use of non-essential use bans every hot summer during years where the amount of rainfall is well below average?

**SSW HH PARTICIPANT 3, CAM PARTICIPANT 3, SSW NHH PARTICIPANT 3 AND CAM NHH PARTICIPANT 3 IS ASKED:** Why did you give this response in relation to bringing in higher charges for customers who use a lot of water during a period of drought?

*Programming note: due to the survey length sections on leakage and metering will be rotated. Half participants in each area will be shown the section on leakage and half will be shown the section on metering – BUT all participants shown Q44-Q46.*

**DP: ROTATE SO THAT:**

**BLOCK 1: HALF SSW HH, HALF SSW NHH, HALF CAM HH AND HALF CAM NHH ARE SHOWN Q39 TO Q43 (LEAKAGE)**

**BLOCK 2: HALF SSW HH, HALF SSW NHH, HALF CAM HH AND HALF CAM NHH ARE SHOWN Q47 TO Q49A**

**ALL ARE SHOWN Q44-Q46**

## What to do about leakage

**Q39. CAMBRIDGE WATER:** In 2020-21 levels of leakage across the Cambridge region were 12.5 million litres per day.

This has reduced by 0.7 million litres per day over the last 2 years but is still equivalent to losing 5 Olympic size swimming pools of water every day. Another way to put this is that currently around 16% of treated water is lost to leaks each day. This is slightly better than the national industry average, which is 20%.

**SOUTH STAFFS WATER:** In 2020-21 levels of leakage across the South Staffs region were 65.5 million Litres per day.

This has reduced by 5 million litres per day over the last 2 years but is still equivalent to losing 26 Olympic size swimming pools of water every day to leaks. Another way to put this is that currently around 20% of treated water is lost to leaks each day. This is the same figure as the national industry average.

**ALL:** Before we tell you more, what level of leakage would you want South Staffs/Cambridge Water to plan for in the future?

**SSW – HH (PULL DOWN LIST)**

They should reduce all leakage to as close as zero as possible

Reduce leakage to less than 5%

Reduce leakage to 5%

Reduce leakage to 10%

Reduce leakage to 15%

As now – keep leakage at 20%

They should let the level of leakage increase and invest more money in other areas

Don't know

**CAM – HH (PULL DOWN LIST)**

They should reduce all leakage as possible

Reduce leakage to less than 5%

Reduce leakage to 5%

Reduce leakage to 10%

As now – keep leakage at 16%

They should let the level of leakage increase and invest more money in other areas

Don't know

---

**Q40. Why did you give this score? Please write in as much information as possible**

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**Q41. The company is using new ways to tackle leakage (like new pipe materials which last longer, using satellites to find leaks or fitting smart sensors which pick up when a leak has started or is about to start). However, even with advances in technology, it is not possible to reduce leaks to zero:**

- Extreme weather, natural wear and tear and heavy traffic mean that pipes will not last forever
- There are always new leaks springing up – such as when the ground moves due to the amount of water in the ground

- Not all leaks can be found as some are very small
- 30% of all leaks come from customers' pipes on their property which they are responsible for and not the water company. The company therefore relies on customers to fix these when they are found.

The cost of fixing leaks becomes more expensive:

- Fixing twice as many leaks won't cost twice as much – it will likely cost three times as much because the leaks that are left are more difficult to find and more expensive to fix
- Reducing demand might be a cheaper way to save the equivalent amount of water when compared to fixing difficult leaks.

Fixing leaks can also be very disruptive to the local community, for example causing delays to traffic whilst roads and pavements are dug up to replace burst pipes or older pipes that might be about to burst.

There is a national target for all water companies to reduce their leakage levels by 50% by 2050: that means that by 2050 levels need to be half the level they were in 2017/18. **SSW**: This would mean that the rate of leakage by 2050 would be 10% of water produced lost each day, compared to 20% last year. **CAM**: This would mean that the rate of leakage by 2050 would be 8% of water produced lost each day, compared to the 16% last year.

How strongly do you support or oppose this national target for reducing leakage?

- Strongly support
- Support
- Neither support nor oppose
- Oppose
- Strongly oppose
- Don't know

---

Q42. Why did you select that option? Please write in as much detail as possible

---

Q43. **ASK IF CODES 4 AND 5 AT 0. OTHERS GOT TO Q44:** When would you like to see the 50% reduction in leakage achieved by?

- Before 2030
- 2030-2034
- 2035-2039
- 2040-2044
- 2045-2049
- Later than 2050
- Never
- Other date – please write in:

## Your views on universal metering

- Q44. Along with a number of other water companies, in 2021 the Department for Environment, Food & Rural Affairs (DEFRA) added both South Staffs Water and Cambridge Water to a list of water companies that are classed as seriously water stressed.

This means that your water company can consider bringing in universal metering. Universal metering is when water meters are installed at the vast majority of customer properties, with the aim of saving water by reducing the amount each person or business uses and making it easier to find leaks. Universal metering is sometimes known as compulsory metering.

Before we tell you more, which of the following best represents how you feel about the introduction of universal metering?

- Strongly support universal metering
- Support universal metering
- Neither support nor oppose
- Oppose universal metering
- Strongly oppose universal metering
- Don't know

SLIDES 9, 10 AND 11:

- Q45. Now that you've learnt a bit more about universal metering, which of the following best represents how you feel about South Staffs/Cambridge Water introducing this policy?

- Strongly support universal metering
- Support universal metering
- Neither support nor oppose
- Oppose universal metering
- Strongly oppose universal metering
- Don't know

- Q46. Why did you select that option? Please write in as much detail as possible

- Q47. We'd now like your view on how South Staffs/Cambridge Water should approach a universal metering programme, with the aim of getting the vast majority of households and the remainder of businesses on a water meter. We won't worry about how quickly this is done for the moment and just focus on the different approaches to installing meters. There are a number of options depending on what you think is most important.

If universal metering does go ahead, which approach would you prefer South Staffs/Cambridge Water to take:

**Minimise costs:** So, a blanket street-by-street roll-out across the region done in a way which is most efficient for the company to reduce the amount it costs to install all the meters

**Minimise the demand for water as quickly as possible:** by starting with areas/neighbourhoods which use, on average, more water per person or possibly lose more water through leaks on customers' properties. **DP – ADD INFO BUTTON:**

This could lead to a bigger reduction in the amount of water being used or lost in the short-term as customers reduce their usage, or fix leaks on their property, in response to having a meter

**Minimise the amount of disruption:** by targeting areas when there is other major works taking place by the water company and/or other utility providers

**Prioritise customer requests:** customers request meters having been told that universal metering is coming into force, which the company then installs. Those that don't make a request are then targeted to have a meter before the end of the universal metering programme.

---

Q48. **HH ONLY. NHH GO TO Q49:** Whether you are for or against universal metering, which of these options would you support? Please note the total costs shown below in the brackets are what it would cost in total to fully roll-out and maintain universal metering between 2025 and 2050.

Universal metering delivered by 2050 at an additional cost of £2.50 per year (a total of £62.50) for each customer

Universal metering delivered by 2040 at an additional cost of £3.50 per year (a total of £87.50) for each customer

Universal metering delivered by 2035 at an additional cost of £4.00 per year (a total of £100) for each customer

Not prepared to pay any more

Don't know

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Q49. Now let's look ahead to a time when more frequent meter readings can be provided. Whether or not you currently have a water meter, how frequently would you like to receive more information on your water use at your HH: home or NHH: business from your water meter?

Daily

Weekly

Twice monthly

Monthly

Quarterly

6 monthly

Once a year

Don't know

Q49a There are a number of different types of water meter that South Staffs/Cambridge Water could fit as part of a universal metering programme. Meters with older technology have to be read in person, which is more expensive.

However, there are now water meters (smart meters) that can be read a few times a month by bin lorries or vans as they drive past, and others like electricity smart meters which can send meter readings direct to your supplier using a secure network at regular intervals.

Which of these would you be prepared to pay for?

An additional £2.50 per year to receive monthly or twice-monthly meter readings

An additional £2.90 per year to receive weekly/daily meter readings

Not prepared to pay any more

Don't know



## South Staffs/Cambridge Water’s Environmental Ambition

Q50. South Staffs/Cambridge Water has some special environmental responsibilities and is already working to protect and improve the water environment. They don’t do this alone, they work closely with others – for example farmers and other landowners to reduce pollution from their land and local conservation groups to support environmental and local community improvements.

But, South Staffs/Cambridge Water has some key choices in terms of their environmental ambition in the future and within their Water Resources Management Plan. **DP – SLIDE 15 POP UP:**

We now want to tell you a bit more about the challenges South Staffs/Cambridge Water faces when thinking about the water environment.

### SLIDES 12, 13 AND 14

Q51. There are broadly three levels of environmental ambition that could go into South Staffs/Cambridge Water’s plans, which are set out below. If you hover the information button you can see more details about each option as well as the potential impact each could have on customer bills.

We’ve also provided a view of the bill impact to deliver each level of ambition, by showing a £ sign by each. A single £ sign indicates the option with the lowest potential bill increase each year, whilst £££ signs indicate the option with the highest potential bill impact. At this point in time the exact costs are not known so we can’t provide any figures. **It is important to have in mind that any increases in customer bills to deliver environmental improvements will start to be applied from 2025 onwards.**

Please also note that in the short-term the level of carbon emissions will by highest in level 3 due to the need to build the infrastructure (such as a reservoir or a water transfer), pump the water and maintain it. Level 1 would have the lowest level of carbon emissions and level 2 would be in between the other two levels. In the longer-term, if more renewable energy sources are used the amount of carbon emission for level 2 and 3 would fall, but it is very unlikely to ever reach the same as level 1.

Which option would you prefer South Staffs/Cambridge Water to implement:

Level 1	Level 2	Level 3
<p>The water environment (i.e.: river, streams, lakes, etc) stays as protected as it is now <b>INFO BUTTON TEXT</b> This is <b>not doing nothing</b> because a lot has to be done just to stand still and to stop these environments from deteriorating or deteriorating further because of issues like climate change reducing rainfall levels and an increasing population and water being wasted, such as due to leakage.</p> <p>This option means more action for the water company to take (just to keep</p>	<p>The water environment stays as protected as it is now, but South Staffs/Cambridge Water also prioritises some of these to protect and improve them <b>££ INFO BUTTON TEXT</b> To make sure it could then meet the long-term demand for water, the company would also need to find alternative sources for water. There could be a need for larger supply options (such as a new reservoir) as well as working to further lower customer demand for water and reduce leakage, which would mean a bigger investment is needed.</p>	<p>South Staffs/Cambridge Water goes even further, working in partnerships to protect and improve the vast majority of water environments <b>INFO BUTTON TEXT</b> The approach would focus on working in partnerships with many other organisations along river catchments to improve the flow of the water and fully restore the water environment to what it was before any damage was done by human activities. Due to the complexity of work and the number of stakeholders involved, this will be the most expensive option for the water company, which</p>

things the same) and therefore some increased investment will be needed. The amount of water saved from reducing customer demand may not be sufficient to allow for additional growth and so new supply options (like a water transfer from a surrounding area) may need to also be considered.		would mean an even bigger investment is needed to find new water sources to meet demand.
Bill impact: £	Bill impact: ££	Bill impact: £££
<b>INSERT RESPONSE BUTTON CENTRED</b>	<b>INSERT RESPONSE BUTTON CENTRED</b>	<b>INSERT RESPONSE BUTTON CENTRED</b>

Q52. Why did you select this option? Please write in as much information as possible

Q53. How do you feel about this level of environmental ambition being achieved by 2050?

- It is too soon
- It is about the right timescale
- It is too late
- Not sure

Q54. Why did you select this option? Please write in as much information as possible

Q55. **ASK IF CODE 3 ATQ53. OTHERS GO TO NEXT SECTION:** When would you like South Staffs/Cambridge Water to deliver your preferred level of environmental ambition?

- Before 2030
- 2030-2034
- 2035-2039
- 2040-2044
- 2045-2049
- Other date – please write in:

## 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, unless you give permission to share them at the end of the survey.

Q56. **HH ONLY. NHH GO TO Q65:** 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

Q57. 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

Q58. Which of the following statements applies to you over the last 12 months? Please select all that apply

ROTATE: APART FROM NONE OF THE ABOVE

I am an active member of an environmental/conservation group or local initiative protect and improve the environment - e.g. Friends of the Earth, World Wildlife Fund, Extinction Rebellion, volunteering time or expertise to local causes  
 I actively encourage family/friends/colleagues to be more environmentally conscious  
 I have lobbied politicians and/or signed petitions on environmental topics  
 None of the above

Q59. 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.

Yes  
 No  
 Prefer not to say  
 Don't know

Q60. A lot of people struggle to pay their household bills. 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	<b>STRUGGLING</b>
3	I sometimes pay my water bill late	<b>STRUGGLING</b>
4	I often find it difficult to pay my water bill on time	<b>IN DEBT</b>
5	I am rarely, or never, able to pay my water bill on time	<b>IN DEBT</b>
6	Prefer not to answer	

Q61. 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 £315	Under £16,380
B1	£316-£442	£16,381 - £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	

Q62. Do you/your partner or other members of your household receive any benefits or tax credits?

1	Yes, myself	<b>ON BENEFITS</b>
2	Yes, someone in my household	
3	No	
4	Prefer not to say	

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Q63. **ONLINE PANEL ONLY:** Thinking about all the people in your household, including yourself, how many people live here permanently for each of these age groups? **IF THERE ARE NO PEOPLE IN YOUR HOUSEHOLD BELONGING TO A CERTAIN AGE GROUP, PLEASE SELECT 'ZERO' FOR IT.**

Up to 15 years .....0..... 1..... 2..... 3..... 4 .....5+  
16 to 65 years .....0..... 1..... 2..... 3..... 4 .....5+  
Over 65 years .....0..... 1..... 2..... 3..... 4 .....5+  
Prefer not to say

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Q64. Which of these ethnic groups do you consider you belong to?

**WHITE**

- 17. British
- 18. Irish
- 19. Any other White background

**MIXED**

- 20. White and Black Caribbean
- 21. White and Black African
- 22. White and Asian
- 23. Any other Mixed background

**ASIAN OR ASIAN BRITISH**

- 24. Indian
- 25. Pakistani
- 26. Bangladeshi
- 27. Any other Asian background

**BLACK OR BLACK BRITISH**

- 28. Caribbean
- 29. African
- 30. Any other Black background

**CHINESE OR OTHER ETHNIC GROUP**

- 31. Chinese
- 32. Any other ethnic group

Prefer not to say

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Q65. **ASK NHH ONLY:** How many employees does your organisation have? If you have more than one office/site/staff working from home, please count all of them in your answer. **SINGLE CODE**

- 1 (Sole trader)
- 2 – 4
- 5 – 9
- 10 - 19
- 20 - 49
- 50 - 99
- 100 - 249
- 250 - 499
- 500 - 999
- 1,000 +
- Don't know

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Q66. **ASK NHH ONLY:** What business sector best defines the main activity of your organisation?

- Agriculture, forestry and fishing
- Mining, quarrying
- Utilities and Energy (including electricity, gas, steam and air-conditioning supply)
- Water supply, sewerage and waste management, recycling
- Food, Drink and Tobacco Manufacturers and Other Manufacturing
- Construction (including plumbing, painting, electrical etc)
- Retail (NOT hairdressing), Wholesale, Motor Trades including vehicle repair
- Transport and Storage (including freight, taxis, airlines, bus, rail and warehousing, post offices)
- Hotel, catering, Camp sites, restaurants, cafes, accommodation, pubs
- Information, Telecommunications (including computer, newspaper, radio, TV, news agency, book publishing)
- Banking, Finance, Insurance
- Real estate and property activities
- Professional, scientific and technical activities
- Business Admin and support services (including cleaning, gardening, employment agencies, office services)
- Education (including schools, universities)
- Health and social work (including hospitals, doctors, dentists, charities, nursing care)
- Government and Defence
- Arts, Recreation, Entertainment (including Libraries, theatres, museums, zoos, sport centres, fitness)
- Other service activities (including Trade Unions, Churches, Repair services, Funeral-related services, Hairdressers)
- Other, please specify
- Prefer not to answer

**Q67. ASK NHH ONLY:** How essential would you say the supply of water is to the day-to-day running of your business?

- Not at all essential
- Not essential
- Neither not essential nor essential
- Essential
- Absolutely essential
- Don't know

**Q68. SSC HH SAMPLE ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H<sub>2</sub>Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service\*

- Yes
- No

\*By ticking 'Yes' you give permission for Accent, who are running this study, to share your e-mail address with 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.

**Q69. SSC SAMPLE ONLY:** Would you like to see the results of the study and how South Staffs Water / Cambridge Water is using customers' feedback to help shape its plans? This information will be available to share from Summer 2022 and a link will be sent to you by e-mail.

- Yes
- No

**Q70. COMMERCIAL PANEL ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H<sub>2</sub>Online. The community allows 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. 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>

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Q71. **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

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Q72. **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**

Yes

No

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Q73. **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 UK stores

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

**ADD FOR ALL:** The results will be used, alongside those of thousands of other customers across the region, to inform where South Staffs/Cambridge Water invests the money from bills.

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

