

IMPACT

FROM INSIGHT TO INFLUENCE

SSC Company Specific Adjustment Research – PR24

Supporting Appendix to
final report

Prepared for South Staffs and Cambridge Water

Prepared by Steve Morley

2nd October 2023

Project No. 1409



All projects are carried out in compliance with the ISO
20252 international standard for market, opinion and social

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Introduction

This report contains all the supporting materials used by impact to undertake SSC's Company Specific Adjustment customer research. It covers:

- The pre task materials developed in advance of the online focus groups and depths interviews, used to educate household (HH) and non-household (NHH) customers on SSC and its role.
- The discussion guides and supporting stimulus materials used in the qualitative phase of the research. The discussion guide contained the questions, discussion areas and prompts used by the moderator to answer the research objectives. The stimulus material was used to further inform customers during the groups and interviews.
- The survey questions and supporting stimulus materials used in the quantitative phase of the research. There were three versions, each tailored to the audience; an online commercial panel, SSC's customer sample list and SSC's H2Online panel.

Please note for each of these documents, a version was created for customers of South Staffs Water (SSW) and Cambridge Water (CAM) regions.

In addition, there is a summary of the cognitive interviews undertaken ahead of the quantitative fieldwork, used to ensure customers were able to answer the questions in the survey and that the stimulus materials were clear and unbiased.

Qualitative Pre-tasks

CAM HH Pre-task

Cambridge Water

...invest millions each year to ensure the homes and businesses in your area receive a safe, reliable and affordable water supply...

Are you aware of the role that Cambridge Water play?

They collect, treat, store and distribute water. They are a water only company, and do not take away your waste water (wastewater is billed on behalf of Anglian Water).

Cambridge Water

- ✓ Serves almost 360,00 people (approx. 140,000 homes and 9,000 business properties)
- ✓ The water is taken from 23 underground water sources before being treated
- ✓ Supply around 83 million litres - or 400,000 million full bath tubs - of water every day to customers
- ✓ Water transported to customers' properties through 2,470km of pipes, powered by 47 pumping stations

- ✓ 75% of household properties have water meters, and over 90% of non-household (businesses) are metered
- ✓ Work with landowners and local communities to help restore the natural environment
- ✓ Provide customer service and support more than 3,360 customers with discounted bills and assisting more than 8,900 customers who need extra help
- ✓ Work with local schools to help educate future generations about the importance of using water wisely

Things to think about before the discussion group

Please write down your thoughts on the following points, and bring these notes with you to the focus group, as we will spend some time exploring your views on Cambridge Water.



How much do you think you pay for your water supply?

- Without looking at your bill, please note down how much you think you currently pay Cambridge Water each month.
- Do you know how much the charges are for (clean) water versus used (waste water) services?
- Do you receive a discount?



Find out how much you actually pay for water

- Please find a recent water bill from Cambridge Water. How much do you pay?
- Is this more than you thought, less than, or as expected?
- Does this seem like good value for money?
- What do you feel about this amount in relation to other utility bills you pay?



Overall satisfaction with the service

- Thinking overall, how satisfied are you with the current level of service provided by Cambridge Water? Note this down on a scale of 1-5.
- When thinking about Cambridge Water, what are you happy with?
- What are you not happy with, or think could be improved?



Let's get thinking about other suppliers

- Can you think of any supplier that you use in your day to day life that you particularly like? Not your water supplier, but from another aspect of your life. For example, it could be the supplier that provides your TV or broadband, electricity, gas, a food product, or anything else...
Who / which company are you thinking of?
- What is it that you like about the supplier? What do they do well?
- Please pick three main words to describe them by (e.g. what are their best qualities, what makes them a good supplier):

1.

2.

3.

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- ✓ Work with local schools to help educate future generations about the importance of using water wisely

How the retail market works

Since the retail market opened in April 2017 there have been significant changes in the way traditional water companies operate

The wholesaler

The activities of taking water from the environment, treatment, distribution and maintaining the pipe network (the 'upstream' activities) remain the responsibility of the water company ('the wholesaler')

As a business customer, you can switch the retailer you use to provide your retail services, but not the wholesaler who supplies your water services

The retailers

Other key activities (the 'downstream' activities) have transferred to business market suppliers (or 'retailers') operating in the market

These activities include:

- Meter reading
- Customer billing
- Customer service (including enquiries and complaints)

Please remember as you complete the tasks that we are only thinking about the services that Cambridge Water supplies to your business as a wholesaler

How the water retail market works



Things to think about before the discussion group

Please write down your thoughts on the following points, and bring these notes with you to the focus group, as we will spend some time exploring your views on Cambridge Water.



How much do you think you pay for your water supply?

- Without looking at your bill, please note down how much you think your organisation currently pay Cambridge Water for your clean water services each month.
- Do you know how much the charges are for (clean) water versus used (waste water) services?
- Does your organisation receive a discount?



Find out how much you actually pay for water

- Please find a recent water bill. How much does your organisation pay for your water services?
- Is this more than you thought, less than, or as expected?
- Does this seem like good value for money?
- What do you feel about this amount in relation to other utility bills your organisation pays?



Overall satisfaction with the service

- Thinking overall, how satisfied are you with the current level of service provided by Cambridge Water? Note this down on a scale of 1-5. (Remember, they don't deal with your water bills, customer service enquiries and taking water meter reads)
- When thinking about Cambridge Water, what are you happy with?
- What are you not happy with, or think could be improved?



Let's get thinking about other suppliers

- Can you think of any supplier that your organisation uses that you particularly like? Not your water supplier, but from another aspect of your operations. For example, it could be the supplier that provides your broadband, electricity, gas, an equipment or product supplier, or anything else... Who / which company are you thinking of?
- What is it that you like about the supplier? What do they do well?
- Please pick three main words to describe them by (e.g. what are their best qualities, what makes them a good supplier):

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South Staffs Water

...invest millions each year to ensure the homes and businesses in your area receive a safe, reliable and affordable water supply...

Are you aware of the role that South Staffs Water play?

They collect, treat, store and distribute water. They are a water only company, and do not take away your waste water (wastewater is billed on behalf of Severn Trent Water).

South Staffs Water

- ✓ Serves 1.3 million people (approx. 556,000 homes and 35,000 business properties)
- ✓ Water is taken from two surface water and 20 underground water sources before being treated
- ✓ Supply around 325 million litres - or 1.60 million full bath tubs - of water every day to customers
- ✓ Water transported to customers' properties through 6,200km of pipes, powered by 66 pumping stations
- ✓ 45% of household properties have water meters, and over 90% of non-household (businesses) are metered
- ✓ Work with landowners and local communities to help restore the natural environment
- ✓ Provide customer service and support more than 48,700 customers with discounted bills and assisting more than 57,600 customers who need extra help
- ✓ Work with local schools to help educate future generations about the importance of using water wisely

Things to think about before the discussion group

Please write down your thoughts on the following points, and bring these notes with you to the focus group, as we will spend some time exploring your views on South Staffs Water.



How much do you think you pay for your water supply?

- Without looking at your bill, please note down how much you think you currently pay South Staffs Water each month.
- Do you know how much the charges are for (clean) water versus used (waste water) services?
- Do you receive a discount?



Find out how much you actually pay for water

- Please find a recent water bill from South Staffs Water. How much do you pay?
- Is this more than you thought, less than, or as expected?
- Does this seem like good value for money?
- What do you feel about this amount in relation to other utility bills you pay?



Overall satisfaction with the service

- Thinking overall, how satisfied are you with the current level of service provided by South Staffs Water? Note this down on a scale of 1-5
- When thinking about South Staffs Water, what are you happy with?
- What are you not happy with, or think could be improved?



Let's get thinking about other suppliers

- Can you think of any supplier that you use in your day to day life that you particularly like? Not your water supplier, but from another aspect of your life. For example, it could be the supplier that provides your TV or broadband, electricity, gas, a food product, or anything else...
Who / which company are you thinking of?
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How the retail market works

Since the retail market opened in April 2017 there have been significant changes in the way traditional water companies operate

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Other key activities (the 'downstream' activities) have transferred to business market suppliers (or 'retailers') operating in the market

These activities include:

- Meter reading
- Customer billing
- Customer service (including enquiries and complaints)

Please remember as you complete the tasks that we are only thinking about the services that South Staffs Water supplies to your business as a wholesaler

How the water retail market works



Things to think about before the discussion group

Please write down your thoughts on the following points, and bring these notes with you to the focus group, as we will spend some time exploring your views on South Staffs Water.



How much do you think you pay for your water supply?

- Without looking at your bill, please note down how much you think your organisation currently pay South Staffs Water for your clean water services each month.
- Do you know how much the charges are for (clean) water versus used (waste water) services?
- Does your organisation receive a discount?



Find out how much you actually pay for water

- Please find a recent water bill. How much does your organisation pay for your water services?
- Is this more than you thought, less than, or as expected?
- Does this seem like good value for money?
- What do you feel about this amount in relation to other utility bills your organisation pays?



Overall satisfaction with the service

- Thinking overall, how satisfied are you with the current level of service provided by South Staffs Water? Note this down on a scale of 1-5. (Remember, they don't deal with your water bills, customer service enquiries and taking water meter reads)
- When thinking about South Staffs Water, what are you happy with?
- What are you not happy with, or think could be improved?



Let's get thinking about other suppliers

- Can you think of any supplier that your organisation uses that you particularly like? Not your water supplier, but from another aspect of your operations. For example, it could be the supplier that provides your broadband, electricity, gas, an equipment or product supplier, or anything else... Who / which company are you thinking of?
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Qualitative Discussion Guides

CAM NHH Discussion Guide

AREA OF DISCUSSION	TIME ALLOCATION
• Introductions	10 minutes
• Review of pre-task & perceptions of service and overall value for Cambridge Water	15 minutes
• Perceptions SSC as small / local company	20 minutes
• Explanation of SSC applying for CSA, and the potential impact on customer bills	10 minutes
• Explore levels of cost increases and comfort with each	15 minutes
• Alternative options to the CSA	10 minutes
• Communication	5 minutes
• Wrap-up	5 minutes

Moderator notes:

1. Please only read out 'Cambridge Water' throughout this focus group.

GROUP STRUCTURE (1 ½ HOURS):

1. Introductions (10 minutes):

- Introduce yourself
- Explain that the research is being conducted on behalf of Cambridge Water, responsible for operating and maintaining the water network (not the waste water system) in your region.
- Purpose of discussion: To understand your views and perceptions of Cambridge Water including its performance and the water bills your organisation pays for the services it provides and how the company is looking to fund its investments in the future. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030, and this session is part of a much wider programme of engagement with customers.
- Your confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible.
- Discussion will last around 90 mins.
- Explain moderator's role and set out 'rules' (speak loudly / clearly / not all together)
- Explain audio and video recording, and members of the Impact and SSC teams observing (name individuals).
- **Moderator: Be aware that customers might bring up data leak/ security issues – if so, assure them their concerns are valid and point them in the direction of the company website / contact for SSC. Not the topic of today's discussion. Data relating to business customers has not been impacted by this incident.**
- Any questions?

- Introduce yourself – first name, where are they from, what does their business do, what’s going well what’s a challenge at the moment?

2. Review of pre-task and perceptions of service and overall value from SSC (15 minutes):

- How did you find the pre-task?
 - Was it easy or difficult to answer?
 - Was it clear from the pre-task the difference between the services Cambridge Water supplies and the billing, customer service and metering services provided by another supplier?
- Had you heard of Cambridge Water before completing the pre-task?
- What are your “top of mind” perceptions of Cambridge Water?
- What do you know about Cambridge Water?
- What services do you think they provide and what do you think are their main responsibilities?
- What do you think about value for money – think about how much you pay and what value you get for that as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not for the clean water services they supply?
- Why or why not?
- Hopefully you have a copy of your water bill to remind you how much do you pay at the moment for your water, if you do know please share with the group. **(Read out: Remember to tell us the amount you pay for your drinking water – the clean water that comes through your taps – were you able to find this on your latest bill?)**
- Was this a shock or surprise to you, or as expected?
- What do you think is included in your bill?
- Thoughts on this compared to other utility bills that your organisation pay?
- How satisfied are you with the current level of service they provide? Rating on scale of 1-5.
- What do you think of your water service in general (**clean water, not waste water**)?
 - Drinking water? Quality, taste, reliability of the supply?
- 1. How do you think they compare to other water companies?
 - ✓ Has anyone been served by a different water company in the past? If so, any thoughts on what is different between them and Cambridge Water? What is the same between them?
 - ✓ Probe for differences between Cambridge Water and larger companies such as Anglian Water.
 - ✓ **Remind, as needed, that their sewage provider is not Cambridge Water**

In a few words, how would you describe Cambridge Water to a friend or family member (that isn't served by the company)?

- In a few words, if you can, how would you describe Anglian Water - who take away your waste water?
- How does the way you describe Cambridge Water differ from how you described your favourite supplier you picked in the pre-task? Who was your favourite supplier and why?

If it hasn't been bought up naturally in discussion, ask if they think Cambridge Water is a small or large water company?

Showcard O – adjective board

- Please pick the top 3 words that you think most relate to Cambridge Water.
- Ask them to share their top 3
- Why did you pick these? What resonates with you?

3. Perception of SSC as a small / local company (20 minutes):

Moderator: Read out about Cambridge Water:

South Staffordshire Plc owns Cambridge Water and South Staffs Water, who collect, treat, store and distribute water in its respective area of supply. They are a water only company, meaning they do not take away your waste water (waste water is billed on behalf of Anglian Water). Cambridge Water serves almost 360,000 people (approximately 140,000 homes and 9,000 business properties). They are a privately owned company and always have been, and currently have one UK based shareholder.

Showcard A and B

- Thoughts on the value of them being a smaller water company? Good or bad thing?
- What does this say about the company?
- What do you think are the advantages, of your organisation being served by a small company? *Prompt customer service, bill level, response times, accessibility – easy for customers to contact, focused only on water and not sewage, local employer, supporting local environmental schemes*
- Why do you think these are an advantage over being served by a larger water company? *Spontaneous response, then prompt on local knowledge, community engagement, pride, close-knit feel, local employer, targeted communications.*

- What, if any, are the disadvantages of being served by a small water company? *Spontaneous then prompt on purchasing power, brand/publicity, customer service, bill levels, ability to respond quickly, level of resources available, resilience to disasters.*

- *If it hasn't come up spontaneously, probe on thoughts on them as a 'local' company.*

- Would you prefer your organisation to be served by a small or large water company?

Showcard C – I want you to answer on a scale of 1 – 10, where 1 represents a small water company and 10 represents a large water company. *Make sure all respondents answer – in chat box or saying aloud.*

- Why have you given that score? *Moderator, ensure we explore this point with multiple participants.*
 - Having heard more about the company, have your thoughts on value for money changed? Why?
 - Are you aware of any local environmental or community-based initiatives or schemes that Cambridge Water run in the communities they serve?
- *Spontaneous responses first, then show **Showcard D***
- *Moderator – Please remind customers that all water companies will run certain types of schemes and initiatives such as these ones, so Cambridge Water is not unique in offering many of these types of initiatives. These initiatives shown are specific to Cambridge Water.*

Moderator read out:

- Cambridge Water run Education Programmes, mainly in primary schools, where they conduct workshops on water efficiency and the water cycle. They engaged with over 350 pupils during 2021/22.
- Cambridge Water employees also donate around 400 volunteer days to the local community every year.
- Cambridge Water support WaterAid to help transform thousands of people's lives who don't have access to clean water.
- The company supports over 3,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 on their priority services register who need extra help accessing their water services – e.g. bottled water drops if the water supply is cut off for a period.
- Cambridge Water also run an environmental initiative called its SPRING farming Scheme. Farmers can apply for a grant of up to £10,000, towards the cost of improvements and land management ideas designed to protect the environment and improve water quality by stopping fertilizers and other farming related contaminants from reaching water sources.

- They also have the PEBBLE biodiversity fund where organisations or individuals can apply for up to £10,000 in funding for projects aiming to improve, restore or create habitats in the region they serve.
- In 2021 they launched a community vehicle, called 'Water on Wheels'. Most weeks they travel to a new location, to provide locals with advice and support regarding their water.
- Thoughts on these initiatives? Advantages and disadvantages of each.
- Anything you think they could be doing as a local / small water company that they are not already? Why?

Moderator read out: Before we get onto the next section, we are going to look at some industry comparisons, so we can see how Cambridge Water is performing compared to other water companies in England and Wales.

SHOWCARDS F, G, H, I (do not show card 'I' for NHH groups)

- *SSW and CAM: Showcard F* shows the number of times all the water companies In England and Wales were contacted by their customers in 2020/2021 to raise issues or queries about their water supply's taste and/or smell. The industry average is 2.5 customer contacts per 10,000 properties supplied. Cambridge Water and South Staffs is one of 7 companies who performed above average in 2021/22, with 1.8 contacts per 10,000 properties. The company's performance over recent years is improving.
 - **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD G**
- *SSW and CAM: Showcard G* although most customers will experience no interruption to their water supply in a typical year, your water company counts the number of properties that are affected and the length of time they were without water. This chart shows that Cambridge Water and South Staffs is one of seven companies performing above the national target when it comes to how long supply interruptions last, with an average time of 3 mins and 15 seconds, whilst the national target is 6 mins and 8 seconds. The company's performance over recent years is improving.
 - **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD H**
- *CAM: Showcard H* - All companies have been set targets by Ofwat to reduce leakage levels. The graph shows whether water companies have met their targets based on their performance over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest gaps between the green and checked bars show the companies that have exceeded the target the most. Cambridge Water has exceeded its leakage reduction target in 2021/22 by reducing leakage levels on average by 13.5% over the last 3 years. Those companies with bars in red did not meet their leakage target.

However, their performance in 2022/23 has not been as good as the previous two years. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst. It's also important to have in mind that each day the equivalent of 5 Olympic size swimming pools of water is lost to leakage in the Cambridge Water (70% comes from pipes owned by the company and 30% from pipes owned by customers on their properties) – that's around the equivalent of 16% of the water put into supply lost each day and the figure is less than the national average of 20%.

- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON**
- What are your initial thoughts on these industry comparisons, which cover four of the most important priority areas for many customers?
- Any surprises?
- Any concerns – where they need to do better?
- Has seeing these comparisons change how you feel about Cambridge Water?
- Anything else you would like to see performance comparisons on?

ONLY SHOW SHOWCARD N IF BILL COMPARISONS ARE MENTIONED SPONTANEOUSLY (bill comparison).

Here you can see the average household clean water bills for 2022-23 for Cambridge Water and other water companies in the UK. As you can see, the average clean water bill in this region is at the lower end of the range. This will not likely reflect your own clean water bill, but provides a sense of how the bills in this region compare to other areas of the country.

Now we want to talk about bills. In the next planning period for water companies, begins in 2025 and will cover a period of 5 years to 2030. Ahead of 2025, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces - from a growing population to changing rainfall and weather patterns and increased levels of pollution in the environment. This means it is vital to keep improving and upgrading water treatment works, investing in new sources of water (like reservoirs) and further reducing leakage levels, and investing in initiatives to reduce carbon and other greenhouse gas emissions and restoring the water environment (such as rivers and streams) along with improving customer service and support for customers. This planning process happens every 5 years, and ensures that there is a set amount of money that each water company can charge its customers over the 5-year period to deliver their plans – we will discuss this a bit more in the next section.

SHOWCARD Q –

Cambridge Water is currently working to finalise their investment plans for 2025-2030 and are engaging with thousands of customers to gain their views on what this plan should contain. On this slide, we are asking you to think about your current annual clean water bill and then looking at what the changes will be for 2025-2030 period. Note that the expected impact of inflation from 2023 onwards is included in these charges. Please bear this in mind during the rest of this session and this research is not about getting into the detail of this latest plan, but we need to show you this figure to allow you to express your thoughts on the information I am about to share with you.

- What are your thoughts on this? Any surprises / concerns?
- Explanation of SSC's potential approach to increasing bills in relation to CSA claim (10 minutes):

Moderator read out:

We are now going to cover the key topic of this session, which is called by the economic regulator for the water sector, Ofwat, a Company Specific Adjustment, or CSA. Before we get into talking about the CSA, let's talk about Ofwat.

Showcard K

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier.

Ofwat is the economic regulator for the water industry in England and Wales. Ofwat's role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price. The main point to draw your attention to on this slide is that every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years – i.e. The total amount of money a water company can collect from its customers and this cannot change over the 5-year period, even if their water company decides to innovate and make changes to their water service. Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and supply interruptions.

Showcard L1

Water companies borrow money to fund major investment programmes which costs £10ms of pounds to deliver each year, such as upgrading a treatment works to the latest treatment technologies to improve the drinking water, or replacing older pipes which are more likely to burst.

This borrowing from lenders is subject to interest payments, and the interest rate paid varies depending on the amount that is borrowed, the period over which it is borrowed and the type of financial products that are available at that time. All water companies have to do this, but the majority of these are much larger than Cambridge Water. Larger companies typically borrow more frequently, and in larger quantities, meaning they are able borrow at a lower interest rate than smaller companies. As your water supplier is a relatively small company, they borrow money less often, and borrow lower amounts, but this can often lead to a higher interest rate.

Showcard L2

Ofwat assume that the cost of borrowing (i.e., the interest payable), is the same across all different water companies, therefore not taking into account the higher cost being paid by smaller water companies to fund their investments. As a result, a scheme exists to allow smaller water companies, such as Cambridge Water, to request a Company Specific Adjustment (CSA) to account for this additional cost. Ofwat sets a high standard for water companies that seek a CSA. They need to make sure it is the right approach for customers, as they have a legal duty to protect customers interests. If a smaller company is granted a CSA, there is an additional impact on customers' water bills, meaning customers are charged a little more. A reminder this additional charge is not to fund service improvements directly, but to cover the additional interest payments your water supplier would have to pay when it borrows money to fund investments. And that the need for a CSA is because smaller water companies can't access the lower interest rates that larger water companies are able to when they borrow money.

- Do you have any questions? Does this all make sense?
- Do you think this is fair?
- What are your initial thoughts on Ofwat's CSA policy?

Moderator read out:

Another example would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

- Can you think of any other examples of this ‘in action’? How do they make you feel – do you think these are fair?

Moderator read out:

As I showed you earlier, clean water bills are very likely to go up during the next pricing period, (2025-2030, mentioned previously) and there could then be a further increase on top of that for the CSA.

- What are your initial thoughts on this?
 - To what extent do you find this acceptable?
- How does this make you feel? Why?
- Is the principle of paying for a small company premium in order to continue being supplied by a smaller/local water company fair? Why or why not?

Moderator prompt: if any customers raise shareholder returns as a reason for the CSA premium not being acceptable, inform that between 2020 and 2025 that shareholder returns are going to be in the range of 2% to 5% of customers’ bills. If challenged on returns for 2025 – 2030 say these will be determined over the next year and agreed with Ofwat, but that there are strict caps to prevent them going too high. Then check back to see if this alters customer views on acceptability.

- **Explore levels of support for cost increases and comfort with each (15 minutes).**

Spontaneous response:

- Taking this information into account, and the comparisons in performance to other water companies, how much would your organisation be willing to pay on top of its **current** annual water bill to fund the CSA for Cambridge Water?
 - And what about on top of your organisation’s bill once bills have **increased** for the next pricing period 2025-2030, as mentioned earlier (with bills potentially going up by 25%)?
- Is this amount affordable to you as a business?

Moderator prompt: Where customers do not agree the amount is affordable moderator to ask where needed to ensure it is clear in the customers’ responses whether it is the CSA amount that is the issue, or the rise in bills for the period 2025-2030, or both combined.

Moderator: If cost increases when running a business mentioned, probe customers on how much they are being impacted and whether that is the main reason why they would not find the CSA affordable. Display Showcard P if needed. Remind that this change is from 2025 to see if that alters their view.

Moderator read out:

If Cambridge Water do introduce the CSA from 2025 to help with the cost of borrowing, it would likely be between **(NHH)** 0.5% to 2.5% each year for business customers – please note this is not cumulative, it's just the same amount each year. If the CSA is introduced, this extra charge would be added on top of the clean water bill charges the company will agree with Ofwat to fund the company's services and investments between 2025-2030. Here are range of values that could be applied to your organisation's clean water bill.

Showcard M with ranges.

- What do you think of this range of increases?
 - Are they higher than you expected?
 - Are they lower than you expected?
- Would increases like this be affordable for your business?
 - Why do you say that?

NHH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): 0.5%, 1%, 1.5%, 2%, 2.5%

- Are each of these affordable?
- Could you afford this current charge on top of your organisation's current clean water bill?
- **NHH:** Could you afford this extra charge if your bill was 25% more than it is now? (The maximum increase amount for AMP8)
- How does affordability differ between the two?
- **Probe on reasoning's** - When in support of a certain amount – what are the reasons behind the support?
When in opposition – what are the reasons for opposition?
- At what point would it become unaffordable?
- Is it fair that everyone gets charged?
- Should some customers be charged more than others?
- How else could the charges be set?
- Probe for suggestions around metered v unmetered customers, domestic v business, those on social tariffs, reduced shareholder returns.
- **Probe around cost of living.** Have you been impacted? Does the rising cost of running a business impact your views on the CSA?

- **Alternative options to the CSA (10 mins):**

SHOWCARD R

We are now going to look at the other potential option for customers vs the CSA. *Moderator reads out:*

There are two potential options.

- **Option A NHH:** Cambridge Water implements the 0.5% - 2.5% extra charge per year as a 'company specific adjustment' between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan
 - **Option B:** you are no longer served by Cambridge Water but by a much larger water company. **PLEASE NOTE THIS IS JUST AN OPTION TO EXPLORE AS SMALLER WATER COMPANIES SOMETIMES DO MERGE WITH LARGE ONES, THE COMPANY IS NOT SUGGESTING THIS IS A LIKELY OUTCOME, JUST A POSSIBILITY.**
- If you had the choice, would you rather continue to be served by Cambridge Water and pay the CSA, or be served by a larger supplier? *Ask each person*
 - Why?
 - Benefits of each
 - Disadvantages of each. *If bill increases are said as a disadvantage, show showcard N which shows bill comparisons between water only companies.*

Communication (5 minutes):

Exercise to try and articulate what the CSA is. Tell a colleague technique – imagine you are explaining this concept to a work colleague of yours. How would you describe it?

Give them 2 mins to write down an answer, please write this in the chat section of teams, but do not post your answer until I say so. After two mins, ask everyone to post their answer, then ask a few respondents to read their answer out loud.

- How did you find trying to explain the CSA to a colleague? How easy or difficult was it to do?
- How would you like to hear from Cambridge Water about the CSA increasing in your water bill (if it gets put in place)?
- How much would you like to know?
 - Probe for: amount it is increasing by, reasons why
- How should it be described? Loan analogy? Any other ideas?
- Is there anything you wouldn't like to know? If so, why?

- Would it be useful to understand what the money is being used for? How it is being spent? How would you prefer to hear about this increase and the reasons for it? e.g., Advertising, social media, website, insert with council tax bill etc)?
- What format would you like to see Cambridge Water present this information to you?
 - Prompt for: Leaflets, TV campaigns etc.

Wrap up (5 minutes):

Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today.

- After our discussions this evening, has your opinion on the value you receive from Cambridge Water changed at all (since talking about them being a small company, and talking about cost of living, etc...)?
 - How?
 - Has it increased? Decreased?
- What is the maximum level for the proposed CSA charges that you would find acceptable? *Up to 2.5%.* Please type your answers and put them in the chat. ***Moderator/ Impact viewer please note these down.***

Mention this if it hasn't been brought up/ asked spontaneously earlier on. Last time Cambridge Water applied for the CSA is was granted to them – this covers water bills paid during the period 2020 to 2025.

- What are your thoughts on this?
- Surprised or was this expected? Did you already know this?
- Is there anything you would like to say to Cambridge Water that hasn't been covered in today's session?

Opportunity for CAM colleagues to thank respondents and give any closing comments.

We will be sending you a feedback form soon so you can provide feedback on the session.

CAM HH Discussion Guide

AREA OF DISCUSSION	TIME ALLOCATION
1. Introductions	10 minutes
2. Review of pre-task & perceptions of service and overall value for Cambridge Water	15 minutes
3. Perceptions SSC as small / local company	20 minutes
4. Explanation of SSC applying for CSA, and the potential impact on customer bills	10 minutes
5. Explore levels of cost increases and comfort with each	15 minutes
6. Alternative options to the CSA	10 minutes
7. Communication	5 minutes
8. Wrap-up	5 minutes

Moderator notes:

- Please only read out 'Cambridge Water' throughout this focus group.

GROUP STRUCTURE (1 ½ HOURS):

1. Introductions (10 minutes):

- Introduce yourself
- Explain that the research is being conducted on behalf of Cambridge Water, responsible for operating and maintaining the water network (not the waste water system) in your region.
- Purpose of discussion: To understand your views and perceptions of Cambridge Water including its performance and the water bills you pay for the services it provides and how the company is looking to fund its investments in the future. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030, and this session is part of a much wider programme of engagement with customers.
- Your confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible.
- Discussion will last around 90 mins.
- Explain moderator's role and set out 'rules' (speak loudly / clearly / not all together)
- Explain audio and video recording, and members of the Impact and SSC teams observing (name individuals).
- ***Moderator: Be aware that customers might bring up data leak/ security issues – if so, assure them their concerns are valid and point them in the direction of the company website / contact for SSC. Not the topic of today's discussion.***
- Any questions?
- Introduce yourself – first name, where are they from, and how long lived there and who lives at them with home, what they do for a living/ with their time, water meter or non-meter?

2. Review of pre-task and perceptions of service and overall value from SSC (15 minutes):

- How did you find the pre-task?
 - Was it easy or difficult to answer?
- Had you heard of Cambridge Water before completing the pre-task?
- What are your “top of mind” perceptions of Cambridge Water?
- What do you know about Cambridge Water?
 - What services do you think they provide and what do you think are their main responsibilities?
- What do you think about value for money – think about how much you pay and what value you get for that as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
 - Hopefully you have a copy of your bill to remind you how much do you pay at the moment for your water, if you do know please share with the group. **(Read out: Remember to tell us the amount you pay for your drinking water – the clean water that comes through your taps - it’s called the “Total Water charge” on the front page of your bill).**
 - Was this a shock or surprise to you, or as expected?
 - What do you think is included in your bill?
 - Thoughts on this compared to other utility bills that you pay?
- How satisfied are you with the current level of service they provide? Rating on scale of 1-5.
 - What do you think of your water service in general (**clean water, not waste water**)?
 - Drinking water? Quality, taste, reliability of the supply?
- How do you think they compare to other water companies?
 - Has anyone been served by a different water company in the past? If so, any thoughts on what is different between them and Cambridge Water? What is the same between them?
 - Probe for differences between Cambridge Water and larger companies such as Anglian Water.
 - **Remind, as needed, that their sewage provider is not Cambridge Water**
- In a few words, how would you describe Cambridge Water to a friend or family member (that isn’t served by the company)?
 - In a few words, if you can, how would you describe Anglian Water - who take away your waste water?
 - How does the way you describe Cambridge Water differ from how you described your favourite supplier you picked in the pre-task? Who was your favourite supplier and why?

- *If it hasn't been bought up naturally in discussion*, ask if they think Cambridge Water is a small or large water company?

Showcard O – adjective board

- Please pick the top 3 words that you think most relate to Cambridge Water.
- Ask them to share their top 3
- Why did you pick these? What resonates with you?

3. Perception of SSC as a small / local company (20 minutes):

Moderator: Read out about Cambridge Water:

South Staffordshire Plc owns Cambridge Water and South Staffs Water, who collect, treat, store and distribute water in its respective area of supply. They are a water only company, meaning they do not take away your waste water (waste water is billed on behalf of Anglian Water). Cambridge Water serves almost 360,000 people (approximately 140,000 homes and 9,000 business properties). They are a privately owned company, with one UK based shareholder. As a household customer, you cannot switch suppliers.

Showcard A and B

- Thoughts on the value of them being a smaller water company? Good or bad thing?
 - What does this say about the company?
 - What do you think are the advantages, of being served by a small company? *Prompt customer service, bill level, response times, accessibility – easy for customers to contact, focused only on water and not sewage, local employer, supporting local environmental schemes*
 - Why do you think these are an advantage over being served by a larger water company? *Spontaneous response, then prompt on local knowledge, community engagement, pride, close-knit feel, local employer, targeted communications.*
 - What, if any, are the disadvantages of being served by a small water company? *Spontaneous then prompt on purchasing power, brand/publicity, customer service, bill levels, ability to respond quickly, level of resources available, resilience to disasters.*
- *If it hasn't come up spontaneously, probe on thoughts on them as a 'local' company.*
- Would you prefer to be served by a small or large water company?

Showcard C – I want you to answer on a scale of 1 – 10, where 1 represents a small water company and 10 represents a large water company. **Make sure all respondents answer – in chat box or saying aloud.**

- Why have you given that score? **Moderator, ensure we explore this point with multiple participants.**
- Having heard more about the company, have your thoughts on value for money changed? Why?
- Are you aware of any local environmental or community-based initiatives or schemes that Cambridge Water run in the communities they serve?
 - **Spontaneous responses first, then show showcard D**
 - **Moderator – Please remind customers that all water companies will run certain types of schemes and initiatives such as these ones, so Cambridge Water is not unique in offering many of these types of initiatives. These initiatives shown are specific to Cambridge Water.**

Moderator read out:

- Cambridge Water run Education Programmes, mainly in primary schools, where they conduct workshops on water efficiency and the water cycle. They engaged with over 350 pupils during 2021/22.
- Cambridge Water employees also donates around 400 volunteer days to the local community every year.
- Cambridge Water support WaterAid to help transform thousands of people’s lives who don’t have access to clean water.
- The company supports over 3,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 on their priority services register who need extra help accessing their water services – e.g. bottled water drops if the water supply is cut off for a period.
- Cambridge Water also run an environmental initiative called its SPRING farming Scheme. Farmers can apply for a grant of up to £10,000, towards the cost of improvements and land management ideas designed to protect the environment and improve water quality by stopping fertilizers and other farming related contaminants from reaching water sources.
- They also have the PEBBLE biodiversity fund where organisations or individuals can apply for up to £10,000 in funding for projects aiming to improve, restore or create habitats in the region they serve.
- In 2021 they launched a community vehicle, called ‘Water on Wheels’. Most weeks they travel to a new location, to provide locals with advice and support regarding their water.
 - Thoughts on these initiatives? Advantages and disadvantages of each.
 - Anything you think they could be doing as a local / small water company that they are not already? Why?

Moderator read out: Before we get onto the next section, we are going to look at some industry comparisons, so we can see how Cambridge Water is performing compared to other water companies in England and Wales.

SHOWCARDS F, G, H, I (do not show card 'I' for NHH groups)

- *SSW and CAM: Showcard F* shows the number of times all the water companies in England and Wales were contacted by their customers in 2020/2021 to raise issues or queries about their water supply's taste and/or smell. The industry average is 2.5 customer contacts per 10,000 properties supplied. Cambridge Water and South Staffs is one of 7 companies who performed above average in 2021/22, with 1.8 contacts per 10,000 properties. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD G**
- *SSW and CAM: Showcard G* although most customers will experience no interruption to their water supply in a typical year, your water company counts the number of properties that are affected and the length of time they were without water. This chart shows that Cambridge Water and South Staffs is one of seven companies performing above the national target when it comes to how long supply interruptions last, with an average time of 3 mins and 15 seconds, whilst the national target is 6 mins and 8 seconds. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD H**

CAM: Showcard H - All companies have been set targets by Ofwat to reduce leakage levels. The graph shows whether water companies have met their targets based on their performance over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest gaps between the green and checked bars show the companies that have exceeded the target the most. Cambridge Water has exceeded its leakage reduction target in 2021/22 by reducing leakage levels on average by 13.5% over the last 3 years. Those companies with bars in red did not meet their leakage target.

However, their performance in 2022/23 has not been as good as the previous two years. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst. It's also important to have in mind that each day the equivalent of 5 Olympic size swimming pools of water is lost to leakage in the Cambridge Water (70% comes from pipes owned by the company and 30% from pipes owned by customers on their properties) – that's around the equivalent of 16% of the water put into supply lost each day and the figure is less than the national average of 20%.

- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD I**

- *SSW and CAM – HH ONLY: Showcard I* The Customer Measure of Experience (C-MeX) is an independent measure of the quality of customer service and experience provided by companies, as rated out of 100 by their customers. The chart shows that Cambridge Water and South Staffs is performing above the average score. Cambridge Water specifically were slightly lower than South Staff's Water, but the difference was minimal. Performance has been above 80/100 for the last 3 years since this measure was introduced and has dipped slightly in 2022/23 so far.

- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON**

- What are your initial thoughts on these industry comparisons, which cover four of the most important priority areas for many customers?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about Cambridge Water?
 - Anything else you would like to see performance comparisons on?

SHOWCARD N (bill comparison).

Here you can see the average household clean water bills for 2022-23 for Cambridge Water and other water companies in the UK. As you can see, the average clean water bill in this region is at the lower end of the range. This will not likely reflect your own clean water bill, but provides a sense of how the bills in this region compare to other areas of the country.

In addition, the next planning period for water companies, begins in 2025 and will cover a period of 5 years to 2030. Ahead of 2025, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces - from a growing population to changing rainfall and weather patterns and increased levels of pollution in the environment. This means it is vital to keep improving and upgrading water treatment works, investing in new sources of water (like reservoirs) and further reducing leakage levels, and investing in initiatives to reduce carbon and other greenhouse gas emissions and restoring the water environment (such as rivers and streams) along with improving customer service and support for customers. This planning process happens every 5 years, and ensures that there is a set amount of money that each water company can charge its customers over the 5-year period to deliver their plans – we will discuss this a bit more in the next section.

- Does it surprise you where Cambridge Water sit in comparison to other water companies?
 - Why is this?

SHOWCARD Q –

Cambridge Water is currently working to finalise their investment plans for 2025-2030 and are engaging with thousands of customers to gain their views on what this plan should contain. At this point, we are showing you the expected maximum charges for the average clean water bill for a household between 2025-2030, and comparing it to the current average clean water bill on this slide. Note that the expected impact of inflation from 2023 onwards is included in these charges. Please bear this in mind during the rest of this session and this research is not about getting into the detail of this latest plan, but we need to show you this figure to allow you to express your thoughts on the information I am about to share with you.

- What are your thoughts on this? Any surprises / concerns?

4. Explanation of SSC's potential approach to increasing bills in relation to CSA claim (10 minutes):

Moderator read out:

We are now going to cover the key topic of this session, which is called by the economic regulator for the water sector, Ofwat, a Company Specific Adjustment, or CSA. Before we get into talking about the CSA, let's talk about Ofwat.

Showcard K

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier.

Ofwat is the economic regulator for the water industry in England and Wales. Ofwat's role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price. The main point to draw your attention to on this slide is that every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years – i.e. The total amount of money a water company can collect from its customers and this cannot change over the 5-year period, even if their water company decides to

innovate and make changes to their water service. Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

Showcard L1

Water companies borrow money to fund major investment programmes which costs £10ms of pounds to deliver each year, such as upgrading a treatment works to the latest treatment technologies to improve the drinking water, or replacing older pipes which are more likely to burst.

This borrowing from lenders is subject to interest payments, and the interest rate paid varies depending on the amount that is borrowed, the period over which it is borrowed and the type of financial products that are available at that time. All water companies have to do this, but the majority of these are much larger than Cambridge Water. Larger companies typically borrow more frequently, and in larger quantities, meaning they are able borrow at a lower interest rate than smaller companies. As your water supplier is a relatively small company, they borrow money less often, and borrow lower amounts, but this can often lead to a higher interest rate.

Showcard L2

Ofwat assume that the cost of borrowing (i.e., the interest payable), is the same across all different water companies, therefore not taking into account the higher cost being paid by smaller water companies to fund their investments. As a result, a scheme exists to allow smaller water companies, such as Cambridge Water, to request a Company Specific Adjustment (CSA) to account for this additional cost. Ofwat sets a high standard for water companies that seek a CSA. They need to make sure it is the right approach for customers, as they have a legal duty to protect customers interests. If a smaller company is granted a CSA, there is an additional impact on customers' water bills, meaning customers are charged a little more. A reminder this additional charge is not to fund service improvements directly, but to cover the additional interest payments your water supplier would have to pay when it borrows money to fund investments. And that the need for a CSA is because smaller water companies can't access the lower interest rates that larger water companies are able to when they borrow money.

- Do you have any questions? Does this all make sense?
- Do you think this is fair?
- What are your initial thoughts on Ofwat's CSA policy?

Moderator read out:

Another example would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

- Can you think of any other examples of this ‘in action’? How do they make you feel – do you think these are fair?

Moderator read out:

As I showed you earlier, the average clean water bill is very likely to go up during the next pricing period, (2025-2030, mentioned previously) and there could then be a further increase on top of that for the CSA.

- What are your initial thoughts on this?
 - To what extent do you find this acceptable?
- How does this make you feel? Why?
- Is the principle of paying for a small company premium in order to continue being supplied by a smaller/local water company fair? Why or why not?

Moderator prompt: if any customers raise shareholder returns as a reason for the CSA premium not being acceptable, inform that between 2020 and 2025 that shareholder returns are going to be in the range of 2% to 5% of customers’ bills. If challenged on returns for 2025 – 2030 say these will be determined over the next year and agreed with Ofwat, but that there are strict caps to prevent them going too high. Then check back to see if this alters customer views on acceptability.

5. Explore levels of support for cost increases and comfort with each (15 minutes).

Spontaneous response:

- Taking this information into account, and the comparisons in performance to other water companies, how much would you be willing to pay on top of your **current** annual water bill to fund the CSA for Cambridge Water?
 - And what about on top of your bill once bills have **increased** for the next pricing period 2025-2030, as mentioned earlier (the average potentially going from £148 to £186)?
- Is this amount affordable to you as a household/business?

Moderator prompt: Where customers do not agree the amount is affordable moderator to ask where needed to ensure it is clear in the customers’ responses whether it is the CSA amount that is the issue, or the rise in bills for the period 2025-2030, or both combined.

Moderator: If cost of living mentioned, probe customers on how much they are being impacted and whether that is the main reason why they would not find the CSA affordable. Display Showcard P if needed. Remind that this change is from 2025 to see if that alters their view.

Moderator read out:

If Cambridge Water do introduce the CSA from 2025 to help with the cost of borrowing, it would likely be between **(HH)** £1 and £4.50 / **(NHH)** 0.5% to 2.5% each year on the average clean water bill paid by customers. If the CSA is introduced, this extra charge would be added on top of the clean water bill the company will agree with Ofwat to fund the company's services and investments between 2025-2030. Here are range of values that could be applied to the average clean water bill.

Showcard M with ranges.

- What do you think of this range of increases?
 - Are they higher than you expected?
 - Are they lower than you expected?
- Would increases like this be affordable for your household/business?
 - Why do you say that?

HH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): £1, £2, £3, £4, £4.50

NHH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): 0.5%, 1%, 1.5%, 2%, 2.5%

- Are each of these affordable?
- Could you afford this current charge on top of your current clean water bill?
- **HH:** Could you afford this extra charge if your bill was £38 more than it is now? (The maximum average increase amount for AMP8)
- **NHH:** Could you afford this extra charge if your bill was 24% more than it is now? (The maximum average increase amount for AMP8)
- How does affordability differ between the two?
- **Probe on reasoning's** - When in support of a certain amount – what are the reasons behind the support?
When in opposition – what are the reasons for opposition?
- At what point would it become unaffordable?
- Is it fair that everyone gets charged?
- Should some customers be charged more than others?

- How else could the charges be set?
- Probe for suggestions around metered v unmetered customers, domestic v business, those on social tariffs, reduced shareholder returns.
- **Probe around cost of living.** *Have you been impacted? Does the rising cost of living impact your views on the CSA?*

6. Alternative options to the CSA (10 mins):

SHOWCARD R

We are now going to look at the other potential option for customers vs the CSA. *Moderator reads out:*

There are two potential options.

- **Option A HH:** Cambridge Water implements the £1 – £4.50 extra charge per year as a ‘company specific adjustment’ between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan
- **Option A NHH:** Cambridge Water implements the 0.5% - 2.5% extra charge per year as a ‘company specific adjustment’ between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan
- **Option B:** you are no longer served by Cambridge Water but by a much larger water company. **PLEASE NOTE THIS IS JUST AN OPTION TO EXPLORE AS SMALLER WATER COMPANIES SOMETIMES DO MERGE WITH LARGE ONES, THE COMPANY IS NOT SUGGESTING THIS IS A LIKELY OUTCOME, JUST A POSSIBILITY.**
- If you had the choice, would you rather continue to be served by Cambridge Water and pay the CSA, or be served by a larger supplier? *Ask each person*
- Why?
- Benefits of each
- Disadvantages of each. *If bill increases are said as a disadvantage, show showcard N which shows bill comparisons between water only companies.*

Communication (5 minutes):

Exercise to try and articulate what the CSA is. Tell a friend technique (or tell a colleague for NHHs) – imagine you are explaining this concept to a family member, close friend or colleague of yours. How would you describe it? Give them 2 mins to write down an answer, please write this in the chat section of teams, but do not post your answer until I say so. After two mins, ask everyone to post their answer, then ask a few respondents to read their answer out loud.

- How did you find trying to explain the CSA to a friend? How easy or difficult was it to do?
- How would you like to hear from Cambridge Water about the CSA increasing in your water bill (if it gets put in place)?
- How much would you like to know?
 - Probe for: amount it is increasing by, reasons why
- How should it be described? Mortgage analogy? Any other ideas?
- Is there anything you wouldn't like to know? If so, why?
- Would it be useful to understand what the money is being used for? How it is being spent? How would you prefer to hear about this increase and the reasons for it? e.g., Advertising, social media, website, insert with council tax bill etc)?
- What format would you like to see Cambridge Water present this information to you?
 - Prompt for: Leaflets, TV campaigns etc.

Wrap up (5 minutes):

Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today.

- After our discussions this evening, has your opinion on the value you receive from Cambridge Water changed at all (since talking about them being a small company, and talking about cost of living, etc...)?
 - How?
 - Has it increased? Decreased?
- What is the maximum level for the proposed CSA charges that you would find acceptable? *Up to £4.50.* Please type your answers and put them in the chat. ***Moderator/ Impact viewer please note these down.***

Mention this if it hasn't been brought up/ asked spontaneously earlier on. Last time Cambridge Water applied for the CSA is was granted to them – this covers water bills paid during the period 2020 to 2025.

- What are your thoughts on this?
- Surprised or was this expected? Did you already know this?
- Is there anything you would like to say to Cambridge Water that hasn't been covered in today's session?

Opportunity for CAM colleagues to thank respondents and give any closing comments.

We will be sending you a feedback form soon so you can provide feedback on the session.

SSW HH Discussion Guide

AREA OF DISCUSSION	TIME ALLOCATION
9. Introductions	10 minutes
10. Review of pre-task & perceptions of service and overall value for SSC	15 minutes
11. Perceptions SSC as small / local company	20 minutes
12. Explanation of SSC applying for CSA, and the potential impact on customer bills	10 minutes
13. Explore levels of cost increases and comfort with each	15 minutes
14. Alternative options to the CSA	10 minutes
15. Communication	5 minutes
16. Wrap-up	5 minutes

Moderator notes:

- Please only read out 'South Staffs Water' throughout this focus group.

GROUP STRUCTURE (1 ½ HOURS):

1. Introductions (10 minutes):

- Introduce yourself
- Explain that the research is being conducted on behalf of South Staffs Water, responsible for operating and maintaining the water network (not the waste water system) in your region.
- Purpose of discussion: To understand your views and perceptions of South Staffs Water including its performance and the water bills you pay for the services it provides and how the company is looking to fund its investments in the future. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030, and this session is part of a much wider programme of engagement with customers.
- Your confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible.
- Discussion will last around 90 mins.
- Explain moderator's role and set out 'rules' (speak loudly / clearly / not all together)
- Explain audio and video recording, and members of the Impact and SSC teams observing (name individuals).
- ***Moderator: Be aware that customers might bring up data leak/ security issues – if so, assure them their concerns are valid and point them in the direction of the company website / contact for SSC. Not the topic of today's discussion.***
- Any questions?

- Introduce yourself – first name, where are they from, and how long lived there and who lives at them with home, what they do for a living/ with their time, water meter or non-meter?

2. Review of pre-task and perceptions of service and overall value from SSC (15 minutes):

- How did you find the pre-task?
 - Was it easy or difficult to answer?
- Had you heard of South Staffs Water before completing the pre-task?
- What are your “top of mind” perceptions of South Staffs Water?
- What do you know about South Staffs Water?
 - What services do you think they provide and what do you think are their main responsibilities?
- What do you think about value for money – think about how much you pay and what value you get for that as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
 - Hopefully you have a copy of your bill to remind you how much do you pay at the moment for your water, if you do know please share with the group. **(Read out: Remember to tell us the amount you pay for your drinking water – the clean water that comes through your taps - it’s called the “Total Water charge” on the front page of your bill).**
 - Was this a shock or surprise to you, or as expected?
 - What do you think is included in your bill?
 - Thoughts on this compared to other utility bills that you pay?
- How satisfied are you with the current level of service they provide? Rating on scale of 1-5.
 - What do you think of your water service in general (**clean water, not waste water**)?
 - Drinking water? Quality, taste, reliability of the supply?
- How do you think they compare to other water companies?
 - Has anyone been served by a different water company in the past? If so, any thoughts on what is different between them and South Staffs Water? What is the same between them?
 - Probe for differences between South Staffs Water and larger companies such as Severn Trent Water.
 - **Remind, as needed, that their sewage provider is not South Staffs Water**
- In a few words, how would you describe South Staffs to a friend or family member (that isn’t served by the company)?

- In a few words, if you can, how would you describe Severn Trent Water - who take away your waste water?
- How does the way you describe South Staffs differ from how you described your favourite supplier you picked in the pre-task? Who was your favourite supplier and why?
- ***If it hasn't been bought up naturally in discussion***, ask if they think South Staffs Water is a small or large water company?

Showcard O – adjective board

- Please pick the top 3 words that you think most relate to South Staffs.
- Ask them to share their top 3
- Why did you pick these? What resonates with you?

3. Perception of SSC as a small / local company (20 minutes):

Moderator: Read out about South Staffs Water:

South Staffordshire Plc owns South Staffs Water and Cambridge Water, who collect, treat, store and distribute water in its respective area of supply. They are a water only company, meaning they do not take away your waste water (waste water is billed on behalf of Severn Trent). South Staffs water serves 1.3 million people (approximately 556,000 homes and 35,000 business properties). They are a privately owned company, with one UK based shareholder. As a household customer, you cannot switch suppliers.

Showcard A and B

- Thoughts on the value of them being a smaller water company? Good or bad thing?
 - What does this say about the company?
 - What do you think are the advantages, of being served by a small company? *Prompt customer service, bill level, response times, accessibility – easy for customers to contact, focused only on water and not sewage, local employer, supporting local environmental schemes*
 - Why do you think these are an advantage over being served by a larger water company? *Spontaneous response, then prompt on local knowledge, community engagement, pride, close-knit feel, local employer, targeted communications.*

- What, if any, are the disadvantages of being served by a small water company? *Spontaneous then prompt on purchasing power, brand/publicity, customer service, bill levels, ability to respond quickly, level of resources available, resilience to disasters.*
- *If it hasn't come up spontaneously, probe on thoughts on them as a 'local' company.*
- Would you prefer to be served by a small or large water company?
 - Showcard C** – I want you to answer on a scale of 1 – 10, where 1 represents a small water company and 10 represents a large water company. *Make sure all respondents answer – in chat box or saying aloud.*
 - Why have you given that score? *Moderator, ensure we explore this point with multiple participants.*
- Having heard more about the company, have your thoughts on value for money changed? Why?
- Are you aware of any local environmental or community-based initiatives or schemes that South Staffs Water run in the communities they serve?
 - *Spontaneous responses first, then show **showcard D***
 - *Moderator – Please remind customers that all water companies will run certain types of schemes and initiatives such as these ones, so South Staffs Water is not unique in offering many of these types of initiatives. These initiatives shown are specific to SSW.*

Moderator read out:

- South Staffs run Education Programmes, mainly in primary schools, where they conduct workshops on water efficiency and the water cycle. They engaged with over 3,700 pupils during 2021/22.
- South Staffs employees also donate around 400 volunteer days to the local community every year.
- For over 30 years, South Staffs have worked with WaterAid to help transform thousands of people's lives who don't have access to clean water.
- The company supports over 48,700 households on low incomes by offering discounted water bills through their Assure tariff and over 57,600 on their priority services register who need extra help accessing their water services – e.g. bottled water drops if the water supply is cut off for a period.
- One environmental scheme by South Staffs is its SPRING farming Scheme, Farmers can apply for a grant of up to £10,000, towards the cost of improvements and land management ideas designed to protect the environment and improve water quality by stopping fertilizers and other farming related contaminants from reaching water sources.
- They also have the PEBBLE biodiversity fund where organisations or individuals can apply for up to £10,000 in funding for projects aiming to improve, restore or create habitats in the region they serve.

- They have a Community Hub in Wednesbury which allows customers to talk to a member of their team face-to-face about their bills, and support on offer. These also do home visits and attend lots of sessions in local communities to support people alongside other organisations.
 - o Thoughts on these initiatives? Advantages and disadvantages of each.
 - o Anything you think they could be doing as a local / small water company that they are not already? Why?

Moderator read out: Before we get onto the next section, we are going to look at some industry comparisons, so we can see how South Staffs Water is performing compared to other water companies in England and Wales.

SHOWCARDS F, G, H, I (do not show card 'I' for NHH groups)

- *SSW and CAM: Showcard F* shows the number of times all the water companies In England and Wales were contacted by their customers in 2020/2021 to raise issues or queries about their water supply's taste and/or smell. The industry average is 2.5 customer contacts per 10,000 properties supplied. South Staffs and Cambridge Water are one of 7 companies who performed above average in 2021/22, with 1.8 contacts per 10,000 properties. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD G**
- *SSW and CAM: Showcard G* although most customers will experience no interruption to their water supply in a typical year, your water company counts the number of properties that are affected and the length of time they were without water. This chart shows that South Staffs and Cambridge Water are one of seven companies performing above the national target when it comes to how long supply interruptions last, with an average time of 3 mins and 15 seconds, whilst the national target is 6 mins and 8 seconds. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD H**

SSW: Showcard H - All companies have been set targets by Ofwat to reduce leakage levels. The graph shows whether water companies have met their targets based on their performance over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest gaps between the green and checked bars show the companies that have exceeded the target the most. South Staffs Water has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by 5.8% over the last 3 years. Those companies with bars in red did not meet their leakage target.

However, their performance in 2022/23 has not been as good as the previous two years. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst. It's also important to have in mind that each day the equivalent of 26 Olympic size swimming pools of water is lost to leakage in the South Staffs region (70% comes from pipes owned by the company and 30% from pipes owned by customers on their properties) – that's around the equivalent of 20% of the water put into supply lost each day and the figure is the same as the national average.

- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD I**
- *SSW and CAM – HH ONLY: Showcard I* The Customer Measure of Experience (C-MeX) is an independent measure of the quality of customer service and experience provided by companies, as rated out of 100 by their customers. The chart shows that South Staffs and Cambridge Water are performing above the average score. Performance has been above 80/100 for the last 3 years since this measure was introduced and has dipped slightly in 2022/23 so far.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON**
- What are your initial thoughts on these industry comparisons, which cover four of the most important priority areas for many customers?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about South Staffs Water?
 - Anything else you would like to see performance comparisons on?

SHOWCARD N (bill comparison).

Here you can see the average household clean water bills for 2022-23 for South Staffs Water and other water companies in the UK. As you can see, the average clean water bill in this region is at the lower end of the range. This will not likely reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

In addition, the next planning period for water companies, begins in 2025 and will cover a period of 5 years to 2030. Ahead of 2025, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces - from a growing population to changing rainfall and weather patterns and increased levels of pollution in the environment. This

means it is vital to keep improving and upgrading water treatment works, investing in new sources of water (like reservoirs) and further reducing leakage levels, and investing in initiatives to reduce carbon and other greenhouse gas emissions and restoring the water environment (such as rivers and streams) along with improving customer service and support for customers. This planning process happens every 5 years, and ensures that there is a set amount of money that each water company can charge its customers over the 5-year period to deliver their plans – we will discuss this a bit more in the next section.

- Does it surprise you where South Staffs sit in comparison to other water companies?
 - Why is this?

SHOWCARD Q –

South Staffs Water is currently working to finalise their investment plans for 2025-2030 and are engaging with thousands of customers to gain their views on what this plan should contain. At this point, we are showing you the expected maximum charges for the average clean water bill for a household between 2025-2030, and comparing it to the current average clean water bill on this slide. Note that the expected impact of inflation from 2023 onwards is included in these charges. Please bear this in mind during the rest of this session and this research is not about getting into the detail of this latest plan, but we need to show you this figure to allow you to express your thoughts on the information I am about to share with you.

- What are your thoughts on this? Any surprises / concerns?

7. Explanation of SSC's potential approach to increasing bills in relation to CSA claim (10 minutes):

Moderator read out:

We are now going to cover the key topic of this session, which is called by the economic regulator for the water sector, Ofwat, a Company Specific Adjustment, or CSA. Before we get into talking about the CSA, let's talk about Ofwat.

Showcard K

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier.

Ofwat is the economic regulator for the water industry in England and Wales. Ofwat's role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

The main point to draw your attention to on this slide is that every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years – i.e. The total amount of money a water company can collect from its customers and this cannot change over the 5-year period, even if their water company decides to innovate and make changes to their water service. Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

Showcard L1

Water companies borrow money to fund major investment programmes which costs £10ms of pounds to deliver each year, such as upgrading a treatment works to the latest treatment technologies to improve the drinking water, or replacing older pipes which are more likely to burst.

This borrowing from lenders is subject to interest payments, and the interest rate paid varies depending on the amount that is borrowed, the period over which it is borrowed and the type of financial products that are available at that time. All water companies have to do this, but the majority of these are much larger than South Staffs Water. Larger companies have more freedom over accessing funds from places such as banks, and so are able to access these funds in large quantities and at times take advantage of lower interest rates. As your water supplier is a relatively small company, they borrow money less often, and borrow lower amounts, but this can often lead to a higher interest rate.

Showcard L2

Ofwat assume that the cost of borrowing (i.e., the interest payable), is the same across all different water companies, therefore not taking into account the higher cost being paid by smaller water companies to fund their investments. As a result, a scheme exists to allow smaller water companies, such as South Staffs Water, to request a Company Specific Adjustment (CSA) to account for this additional cost. Ofwat sets a high standard for water companies that seek a CSA. They need to make sure it is the right approach for customers, as they have a legal duty to protect customers interests. If a smaller company is granted a CSA, there is an additional impact on customers' water bills.

- Do you have any questions? Does this all make sense?
- What are your initial thoughts on Ofwat's CSA policy?

Moderator read out:

Another example would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

- Can you think of any other examples of this 'in action'? How do they make you feel – do you think these are fair?

Moderator read out:

As I showed you earlier, the average clean water bill is very likely to go up during the next pricing period, (2025-2030, mentioned previously) and there could then be a further increase on top of that for the CSA.

- What are your initial thoughts on this?
 - To what extent do you find this acceptable?
- How does this make you feel? Why?
- Is the principle of paying for a small company premium in order to continue being supplied by a smaller/local water company fair? Why or why not?

Moderator prompt: if any customers raise shareholder returns as a reason for the CSA premium not being acceptable, inform that between 2020 and 2025 that shareholder returns are going to be in the range of 2% to 5% of customers' bills. If challenged on returns for 2025 – 2030 say these will be determined over the next year and agreed with Ofwat, but that there are strict caps to prevent them going too high. Then check back to see if this alters customer views on acceptability.

8. Explore levels of support for cost increases and comfort with each (15 minutes).

Spontaneous response:

- Taking this information into account, and the comparisons in performance to other water companies, how much would you be willing to pay on top of your **current** annual water bill to fund the CSA for South Staffs Water?
 - And what about on top of your bill once bills have **increased** for the next pricing period, as mentioned above (the average potentially going from £160 to £198)?
- Is this amount affordable to you as a household/business?

Moderator prompt: Where customers do not agree the amount is affordable moderator to ask where needed to ensure it is clear in the customers' responses whether it is the CSA amount that is the issue, or the rise in bills for the period 2025-2030, or both combined.

Moderator: If cost of living mentioned, probe customers on how much they are being impacted and whether that is the main reason why they would not find the CSA affordable. Display Showcard P if needed. Remind that this change is from 2025 to see if that alters their view.

Moderator read out:

If South Staffs Water do introduce the CSA from 2025 to help with the cost of borrowing, it would likely be between **(HH)** £1 and £4.50 / **(NHH)** 0.5% to 2.5% each year on the average clean water bill paid by customers. If the CSA is introduced, this extra charge would be added on top of the clean water bill the company will agree with Ofwat to fund the company's services and investments between 2025-2030. Here are range of values that could be applied to the average clean water bill.

Showcard M with ranges.

- What do you think of this range of increases?
 - Are they higher than you expected?
 - Are they lower than you expected?
- Would increases like this be affordable for your household/business?
 - Why do you say that?

HH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): £1, £2, £3, £4, £4.50

NHH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): 0.5%, 1%, 1.5%, 2%, 2.5%

- Are each of these affordable?
- Could you afford this current charge on top of your current clean water bill?
- **HH:** Could you afford this extra charge if your bill was £42 more than it is now? (The maximum average increase amount for AMP8)
- **NHH:** Could you afford this extra charge if your bill was 24% more than it is now? (The maximum average increase amount for AMP8)
- How does affordability differ between the two?
- **Probe on reasoning's** - When in support of a certain amount – what are the reasons behind the support?
When in opposition – what are the reasons for opposition?
- At what point would it become unaffordable?
- Is it fair that everyone gets charged?
- Should some customers be charged more than others?

- How else could the charges be set?
- Probe for suggestions around metered v unmetered customers, domestic v business, those on social tariffs, reduced shareholder returns.
- **Probe around cost of living.** *Have you been impacted? Does the rising cost of living impact your views on the CSA?*

9. Alternative options to the CSA (10 mins):

SHOWCARD R

We are now going to look at the other potential option for customers vs the CSA. *Moderator reads out:*

There are two potential options.

- **Option A HH:** South Staffs Water implements the £1 – £4.50 extra charge per year as a ‘company specific adjustment’ between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan
- **Option A NHH:** South Staffs Water implements the 0.5% - 2.5% extra charge per year as a ‘company specific adjustment’ between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan
- **Option B:** you are no longer served by South but by a much larger water company. **PLEASE NOTE THIS IS JUST AN OPTION TO EXPLORE AS SMALLER WATER COMPANIES SOMETIMES DO MERGE WITH LARGE ONES, THE COMPANY IS NOT SUGGESTING THIS IS A LIKELY OUTCOME, JUST A POSSIBILITY.**
- If you had the choice, would you rather continue to be served by South Staffs Water and pay the CSA, or be served by a larger supplier? *Ask each person*
- Why?
- Benefits of each
- Disadvantages of each. *If bill increases are said as a disadvantage, show showcard N which shows bill comparisons between water only companies.*

Communication (5 minutes):

Exercise to try and articulate what the CSA is. Tell a friend technique (or tell a colleague for NHHs) – imagine you are explaining this concept to a family member, close friend or colleague of yours. How would you describe it? Give them 2 mins to write down an answer, please write this in the chat section of teams, but do not post your answer until I say so. After two mins, ask everyone to post their answer, then ask a few respondents to read their answer out loud.

- How did you find trying to explain the CSA to a friend? How easy or difficult was it to do?
- How would you like to hear from South Staffs Water about the CSA increasing in your water bill (if it gets put in place)?
- How much would you like to know?
 - Probe for: amount it is increasing by, reasons why
- How should it be described? Mortgage analogy? Any other ideas?
- Is there anything you wouldn't like to know? If so, why?
- Would it be useful to understand what the money is being used for? How it is being spent? How would you prefer to hear about this increase and the reasons for it? e.g., Advertising, social media, website, insert with council tax bill etc)?
- What format would you like to see South Staffs Water present this information to you?
 - Prompt for: Leaflets, TV campaigns etc.

Wrap up (5 minutes):

Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today.

- After our discussions this evening, has your opinion on the value you receive from South Staffs Water changed at all (since talking about them being a small company, and talking about cost of living, etc...)?
 - How?
 - Has it increased? Decreased?
- What is the maximum level for the proposed CSA charges that you would find acceptable? *Up to £4.50.* Please type your answers and put them in the chat. ***Moderator/ Impact viewer please note these down.***

Mention this if it hasn't been brought up/ asked spontaneously earlier on. Last time South Staffs Water applied for the CSA is was granted to them – this covers water bills paid during the period 2020 to 2025.

- What are your thoughts on this?
- Surprised or was this expected? Did you already know this?
- Is there anything you would like to say to South Staffs Water that hasn't been covered in today's session?

Opportunity for SSW colleagues to thank respondents and give any closing comments.

We will be sending you a feedback form soon so you can provide feedback on the session.

SSW NHH Discussion Guide

AREA OF DISCUSSION	TIME ALLOCATION
17. Introductions	10 minutes
18. Review of pre-task & perceptions of service and overall value for SSC	15 minutes
19. Perceptions SSC as small / local company	20 minutes
20. Explanation of SSC applying for CSA, and the potential impact on customer bills	10 minutes
21. Explore levels of cost increases and comfort with each	15 minutes
22. Alternative options to the CSA	10 minutes
23. Communication	5 minutes
24. Wrap-up	5 minutes

Moderator notes:

- Please only read out 'South Staffs Water' throughout this focus group.

GROUP STRUCTURE (1 ½ HOURS):

1. Introductions (10 minutes):

- Introduce yourself
- Explain that the research is being conducted on behalf of South Staffs Water, responsible for operating and maintaining the water network (not the waste water system) in your region.
- Purpose of discussion: To understand your views and perceptions of South Staffs Water including its performance and the water bills your organisation pay for the services it provides and how the company is looking to fund its investments in the future. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030, and this session is part of a much wider programme of engagement with customers.
- Your confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible.
- Discussion will last around 90 mins.
- Explain moderator's role and set out 'rules' (speak loudly / clearly / not all together)
- Explain audio and video recording, and members of the Impact and SSC teams observing (name individuals).
- ***Moderator: Be aware that customers might bring up data leak/ security issues – if so, assure them their concerns are valid and point them in the direction of the company website / contact for SSC. Not the topic of today's discussion. Data relating to business customers has not been impacted by this incident.***
- Any questions?

- Introduce yourself – first name, where are they from, what does their business do, what’s going well what’s a challenge at the moment?

2. Review of pre-task and perceptions of service and overall value from SSC (15 minutes):

- How did you find the pre-task?
 - Was it easy or difficult to answer?
 - Was it clear from the pre-task the difference between the services South Staffs Water supplies and the billing, customer service and metering services provided by another supplier?
- Had you heard of South Staffs Water before completing the pre-task?
- What are your “top of mind” perceptions of South Staffs Water?
- What do you know about South Staffs Water?
 - What services do you think they provide and what do you think are their main responsibilities?
- What do you think about value for money – think about how much you pay and what value you get for that as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not for the clean water services they supply?
 - Why or why not?
 - Hopefully you have a copy of your bill to remind you how much do you pay at the moment for your water, if you do know please share with the group. **(Read out: Remember to tell us the amount you pay for your drinking water – the clean water that comes through your taps – were you able to find this on your latest bill?)**
 - Was this a shock or surprise to you, or as expected?
 - What do you think is included in your bill?
 - Thoughts on this compared to other utility bills that your organisation pay?
- How satisfied are you with the current level of service they provide? Rating on scale of 1-5.
 - What do you think of your water service in general (**clean water, not waste water**)?
 - Drinking water? Quality, taste, reliability of the supply?
- How do you think they compare to other water companies?
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- In a few words, how would you describe South Staffs to a friend or family member (that isn't served by the company)?
 - In a few words, if you can, how would you describe Severn Trent Water - who take away your waste water?
 - How does the way you describe South Staffs differ from how you described your favourite supplier you picked in the pre-task? Who was your favourite supplier and why?
- *If it hasn't been bought up naturally in discussion*, ask if they think South Staffs Water is a small or large water company?

Showcard O – adjective board

- Please pick the top 3 words that you think most relate to South Staffs.
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Showcard A and B

- Thoughts on the value of them being a smaller water company? Good or bad thing?
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 - Why do you think these are an advantage over being served by a larger water company? *Spontaneous response, then prompt on local knowledge, community engagement, pride, close-knit feel, local employer, targeted communications.*

- What, if any, are the disadvantages of being served by a small water company? *Spontaneous then prompt on purchasing power, brand/publicity, customer service, bill levels, ability to respond quickly, level of resources available, resilience to disasters.*
- *If it hasn't come up spontaneously, probe on thoughts on them as a 'local' company.*
- Would you prefer your organisation to be served by a small or large water company?
Showcard C – I want you to answer on a scale of 1 – 10, where 1 represents a small water company and 10 represents a large water company. *Make sure all respondents answer – in chat box or saying aloud.*
 - Why have you given that score? *Moderator, ensure we explore this point with multiple participants.*
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- Are you aware of any local environmental or community-based initiatives or schemes that South Staffs Water run in the communities they serve?
 - *Spontaneous responses first, then show **showcard D***
 - *Moderator – Please remind customers that all water companies will run certain types of schemes and initiatives such as these ones, so South Staffs Water is not unique in offering many of these types of initiatives. These initiatives shown are specific to SSW.*

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 - o Thoughts on these initiatives? Advantages and disadvantages of each.
 - o Anything you think they could be doing as a local / small water company that they are not already? Why?

Moderator read out: Before we get onto the next section, we are going to look at some industry comparisons, so we can see how South Staffs Water is performing compared to other water companies in England and Wales.

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- *SSW and CAM: Showcard F* shows the number of times all the water companies in England and Wales were contacted by their customers in 2020/2021 to raise issues or queries about their water supply's taste and/or smell. The industry average is 2.5 customer contacts per 10,000 properties supplied. South Staffs and Cambridge Water are one of 7 companies who performed above average in 2021/22, with 1.8 contacts per 10,000 properties. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD G**
- *SSW and CAM: Showcard G* although most customers will experience no interruption to their water supply in a typical year, your water company counts the number of properties that are affected and the length of time they were without water. This chart shows that South Staffs and Cambridge Water are one of seven companies performing above the national target when it comes to how long supply interruptions last, with an average time of 3 mins and 15 seconds, whilst the national target is 6 mins and 8 seconds. The company's performance over recent years is improving.
- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON TO SHOWCARD H**
- *SSW: Showcard H* - All companies have been set targets by Ofwat to reduce leakage levels. The graph shows whether water companies have met their targets based on their performance over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest gaps between the green and checked bars show the companies that have exceeded the target the most. South Staffs Water has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by 5.8% over the last 3 years. Those companies with bars in red did not meet their leakage target.

However, their performance in 2022/23 has not been as good as the previous two years. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst. It's also important to have in mind that each day the equivalent of 26 Olympic size swimming pools of water is lost to leakage in the South Staffs region (70% comes from pipes owned by the company and 30% from pipes owned by customers on their properties) – that's around the equivalent of 20% of the water put into supply lost each day and the figure is the same as the national average.

- **CHECK THIS IS UNDERSTOOD BEFORE MOVING ON**
- What are your initial thoughts on these industry comparisons, which cover four of the most important priority areas for many customers?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about South Staffs Water?
 - Anything else you would like to see performance comparisons on?

ONLY SHOW SHOWCARD N IF BILL COMPARISONS ARE MENTIONED SPONTANEOUSLY (bill comparison).

Here you can see the average household clean water bills for 2022-23 for South Staffs Water and other water companies in the UK. As you can see, the average clean water bill in this region is at the lower end of the range. This will not likely reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

Now we want to talk about bills. In the next planning period for water companies, begins in 2025 and will cover a period of 5 years to 2030. Ahead of 2025, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces - from a growing population to changing rainfall and weather patterns and increased levels of pollution in the environment. This means it is vital to keep improving and upgrading water treatment works, investing in new sources of water (like reservoirs) and further reducing leakage levels, and investing in initiatives to reduce carbon and other greenhouse gas emissions and restoring the water environment (such as rivers and streams) along with improving customer service and support for customers. This planning process happens every 5 years, and ensures that there is a set amount of money that each water company can charge its customers over the 5-year period to deliver their plans – we will discuss this a bit more in the next section.

SHOWCARD Q –

South Staffs Water is currently working to finalise their investment plans for 2025-2030 and are engaging with thousands of customers to gain their views on what this plan should contain. On this side, we are asking you to think about your current annual clean water bill and then looking at what the changes will be for 2025-2030 period. Note that the expected impact of inflation from 2023 onwards is included in these charges. Please bear this in mind during the rest of this session and this research is not about getting into the detail of this latest plan, but we need to show you this figure to allow you to express your thoughts on the information I am about to share with you.

- What are your thoughts on this? Any surprises / concerns?

10. Explanation of SSC's potential approach to increasing bills in relation to CSA claim (10 minutes):

Moderator read out:

We are now going to cover the key topic of this session, which is called by the economic regulator for the water sector, Ofwat, a Company Specific Adjustment, or CSA. Before we get into talking about the CSA, let's talk about Ofwat.

Showcard K

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier.

Ofwat is the economic regulator for the water industry in England and Wales. Ofwat's role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price. The main point to draw your attention to on this slide is that every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years – i.e. The total amount of money a water company can collect from its customers and this cannot change over the 5-year period, even if their water company decides to innovate and make changes to their water service. Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and supply interruptions.

Showcard L1

Water companies borrow money to fund major investment programmes which costs £10ms of pounds to deliver each year, such as upgrading a treatment works to the latest treatment technologies to improve the drinking water, or replacing older pipes which are more likely to burst.

This borrowing from lenders is subject to interest payments, and the interest rate paid varies depending on the amount that is borrowed, the period over which it is borrowed and the type of financial products that are available at that time. All water companies have to do this, but the majority of these are much larger than South Staffs Water. Larger companies have more freedom over accessing funds from places such as banks, and so are able to access these funds in large quantities and at times take advantage of lower interest rates. As your water supplier is a relatively small company, they borrow money less often, and borrow lower amounts, but this can often lead to a higher interest rate.

Showcard L2

Ofwat assume that the cost of borrowing (i.e., the interest payable), is the same across all different water companies, therefore not taking into account the higher cost being paid by smaller water companies to fund their investments. As a result, a scheme exists to allow smaller water companies, such as South Staffs Water, to request a Company Specific Adjustment (CSA) to account for this additional cost. Ofwat sets a high standard for water companies that seek a CSA. They need to make sure it is the right approach for customers, as they have a legal duty to protect customers interests. If a smaller company is granted a CSA, there is an additional impact on customers' water bills.

- Do you have any questions? Does this all make sense?
- What are your initial thoughts on Ofwat's CSA policy?

Moderator read out:

Another example would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

- Can you think of any other examples of this 'in action'? How do they make you feel – do you think these are fair?

Moderator read out:

As I showed you earlier, clean water bills are very likely to go up during the next pricing period, (2025-2030, mentioned previously) and there could then be a further increase on top of that for the CSA.

- What are your initial thoughts on this?
 - To what extent do you find this acceptable?
- How does this make you feel? Why?
- Is the principle of paying for a small company premium in order to continue being supplied by a smaller/local water company fair? Why or why not?

Moderator prompt: if any customers raise shareholder returns as a reason for the CSA premium not being acceptable, inform that between 2020 and 2025 that shareholder returns are going to be in the range of 2% to 5% of customers' bills. If challenged on returns for 2025 – 2030 say these will be determined over the next year and agreed with Ofwat, but that there are strict caps to prevent them going too high. Then check back to see if this alters customer views on acceptability.

11. Explore levels of support for cost increases and comfort with each (15 minutes).

Spontaneous response:

- Taking this information into account, and the comparisons in performance to other water companies, how much would your organisation be willing to pay on top of its **current** annual water bill to fund the CSA for South Staffs Water?
 - And what about on top of your organisation's bill once bills have **increased** for the next pricing period, as mentioned above (with bills potentially going up by 24%)?
- Is this amount affordable to you as a business?

Moderator prompt: Where customers do not agree the amount is affordable moderator to ask where needed to ensure it is clear in the customers' responses whether it is the CSA amount that is the issue, or the rise in bills for the period 2025-2030, or both combined.

Moderator: If cost increases when running a business mentioned, probe customers on how much they are being impacted and whether that is the main reason why they would not find the CSA affordable. Display Showcard P if needed. Remind that this change is from 2025 to see if that alters their view.

Moderator read out:

If South Staffs Water do introduce the CSA from 2025 to help with the cost of borrowing, it would likely be between **(NHH)** 0.5% to 2.5% each year for business customers – please note this is not cumulative, it's just the same amount each year. If the CSA is introduced, this extra charge would be added on top of the clean water bill charges the company will agree with Ofwat to fund the company's services and investments between 2025-2030. Here are range of values that could be applied to your organisation's clean water bill.

Showcard M with ranges.

- What do you think of this range of increases?
 - Are they higher than you expected?
 - Are they lower than you expected?
- Would increases like this be affordable for your business?
 - Why do you say that?

NHH: Probe for impacts/views at each cost level (may be covered above already, but lay these out if not): 0.5%, 1%, 1.5%, 2%, 2.5%

- Are each of these affordable?
- Could you afford this current charge on top of your organisation's current clean water bill?
- **NHH:** Could you afford this extra charge if your bill was 24% more than it is now? (The maximum increase amount for AMP8)
- How does affordability differ between the two?
- **Probe on reasoning's** - When in support of a certain amount – what are the reasons behind the support?
When in opposition – what are the reasons for opposition?
- At what point would it become unaffordable?
- Is it fair that everyone gets charged?
- Should some customers be charged more than others?
- How else could the charges be set?
- Probe for suggestions around metered v unmetered customers, domestic v business, those on social tariffs, reduced shareholder returns.
- **Probe around cost of living.** *Have you been impacted? Does the rising cost of running a business impact your views on the CSA?*

12. Alternative options to the CSA (10 mins):

SHOWCARD R

We are now going to look at the other potential option for customers vs the CSA. Moderator reads out:

There are two potential options.

- **Option A NHH: South Staffs Water implements the 0.5% - 2.5% extra charge per year as a 'company specific adjustment' between 2025 and 2030 and continues to operate the way that it currently does and deliver its agreed plan**

- **Option B: you are no longer served by South but by a much larger water company. PLEASE NOTE THIS IS JUST AN OPTION TO EXPLORE AS SMALLER WATER COMPANIES SOMETIMES DO MERGE WITH LARGE ONES, THE COMPANY IS NOT SUGGESTING THIS IS A LIKELY OUTCOME, JUST A POSSIBILITY.**
- If you had the choice, would you rather continue to be served by South Staffs Water and pay the CSA, or be served by a larger supplier? *Ask each person*
- Why?
- Benefits of each
- Disadvantages of each. *If bill increases are said as a disadvantage, show showcard N which shows bill comparisons between water only companies.*

Communication (5 minutes):

Exercise to try and articulate what the CSA is. Tell a colleague technique for NHHs – imagine you are explaining this concept to a work colleague of yours. How would you describe it?

Give them 2 mins to write down an answer, please write this in the chat section of teams, but do not post your answer until I say so. After two mins, ask everyone to post their answer, then ask a few respondents to read their answer out loud.

- How did you find trying to explain the CSA to a colleague? How easy or difficult was it to do?
- How would you like to hear from South Staffs Water about the CSA increasing in your water bill (if it gets put in place)?
- How much would you like to know?
 - Probe for: amount it is increasing by, reasons why
- How should it be described? Loan analogy? Any other ideas?
- Is there anything you wouldn't like to know? If so, why?
- Would it be useful to understand what the money is being used for? How it is being spent? How would you prefer to hear about this increase and the reasons for it? e.g., Advertising, social media, website, insert with council tax bill etc)?
- What format would you like to see South Staffs Water present this information to you?
 - Prompt for: Leaflets, TV campaigns etc.

Wrap up (5 minutes):

Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today.

- After our discussions this evening, has your opinion on the value you receive from South Staffs Water changed at all (since talking about them being a small company, and talking about cost of living, etc...)?
 - How?
 - Has it increased? Decreased?
- What is the maximum level for the proposed CSA charges that you would find acceptable? *Up to 2.5%.* Please type your answers and put them in the chat. ***Moderator/ Impact viewer please note these down.***

Mention this if it hasn't been brought up/ asked spontaneously earlier on. Last time South Staffs Water applied for the CSA is was granted to them – this covers water bills paid during the period 2020 to 2025.

- What are your thoughts on this?
 - Surprised or was this expected? Did you already know this?
- Is there anything you would like to say to South Staffs Water that hasn't been covered in today's session?

Opportunity for SSW colleagues to thank respondents and give any closing comments.

We will be sending you a feedback form soon so you can provide feedback on the session.

Qualitative stimulus

CAM HH stimulus

Showcard O

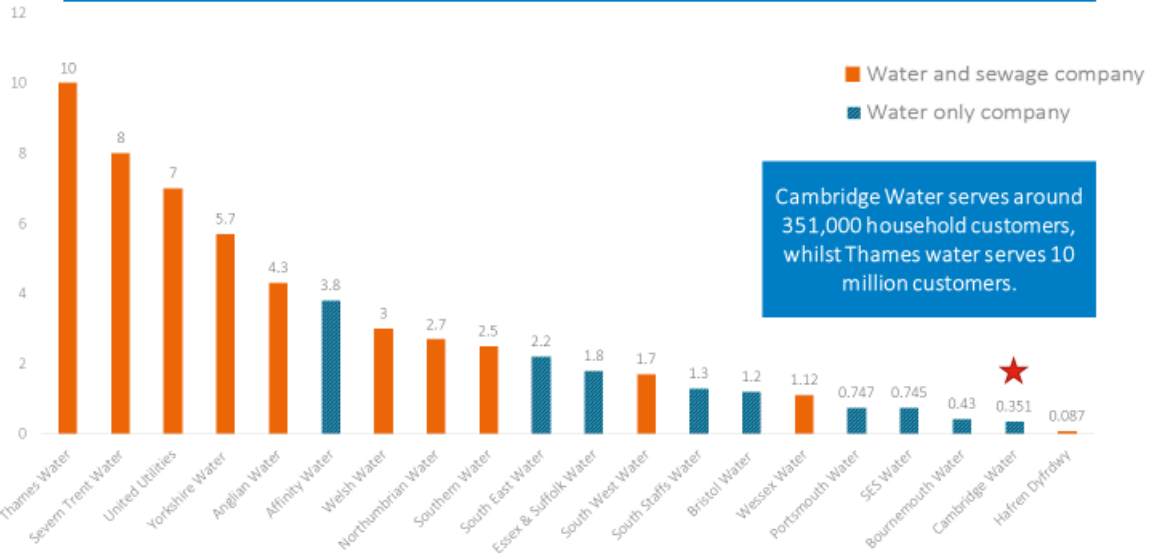


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Showcard A

Approximate number of customer properties currently served with drinking water - expressed in millions



Cambridge Water serves around 351,000 household customers, whilst Thames water serves 10 million customers.

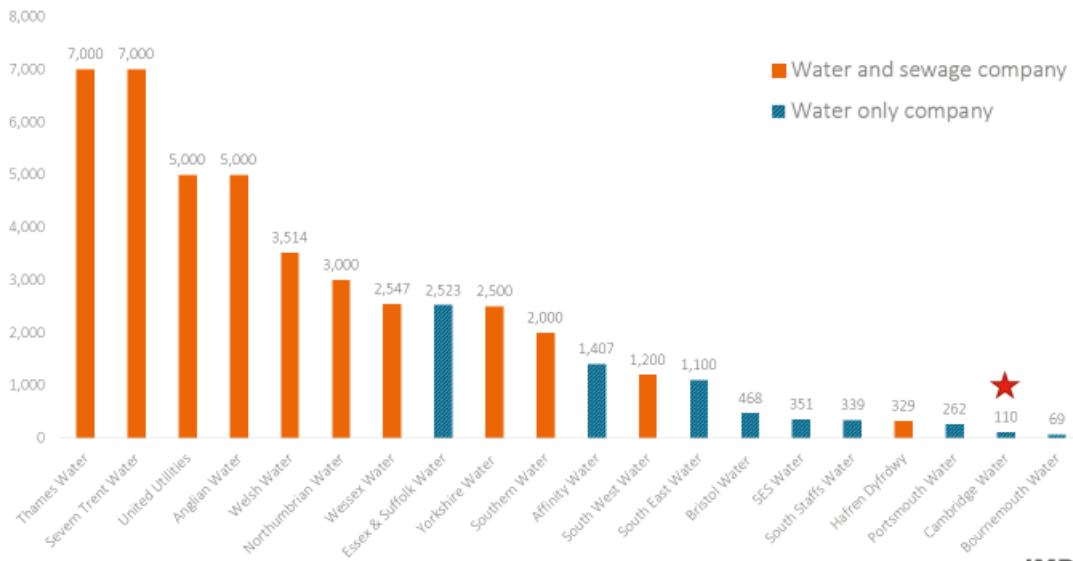
*Bristol and Bournemouth are both part of South West Water, and Hafren is part of the Severn Trent group

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Showcard B

Approximate number of employees for each water company



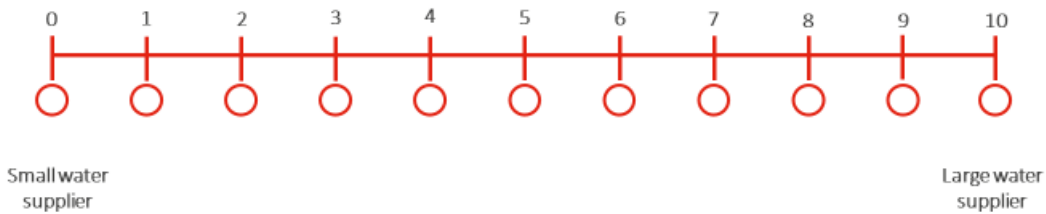
*Bristol and Bournemouth are both part of South West Water, and Hafren is part of the Severn Trent group

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Showcard C

Would you rather be served by a smaller water supplier, or a larger water supplier?
Please let us know where you sit on this scale.



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Cambridge Water Community and Environmental Initiatives



Education outreach in schools

Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.



Additional support for those who need extra help

The company supports over 3,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 on their priority services register who need extra help accessing their water services – e.g. bottled water drops if the water supply is cut off for a period.

Employee Volunteering

Donate around 400 volunteer days to the local community every year.



PEBBLE biodiversity fund

Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.



WaterAid

Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Community Vehicle - 'Water on Wheels'

Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.



SPRING - Environmental Protection Scheme

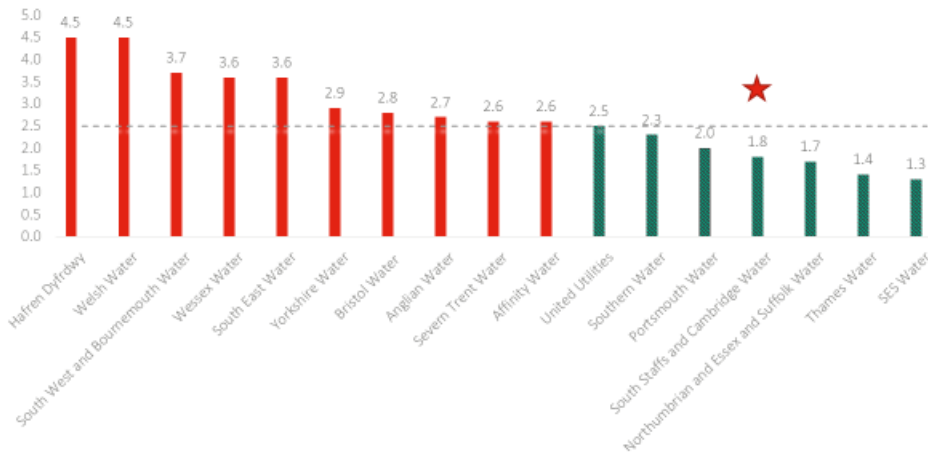
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary on-farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

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Water companies measure the number of customer contacts concerning their drinking water quality – e.g. on taste or smell of the water

Approx. number of times companies were contacted by customers about their water's taste and smell (per 10,000 properties supplied) – figures are for 2021/22



The industry average is 2.5 customer contacts per 10,000 properties supplied

Performance score
 2020/21: 2.0
 2021/22: 1.8
 2022/23 YTD: 1.6

This bar chart includes information from Water UK taken from discoverwater.co.uk

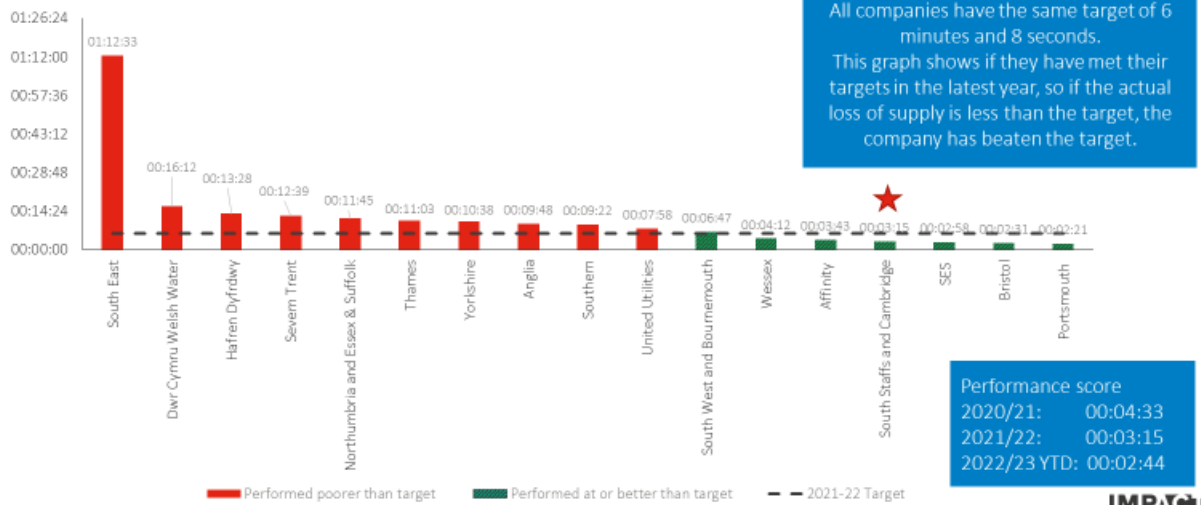
Produced by Impact Research Ltd in strict confidence



Showcard G

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

Average minutes lost due to supply interruptions (per total properties served) against company targets



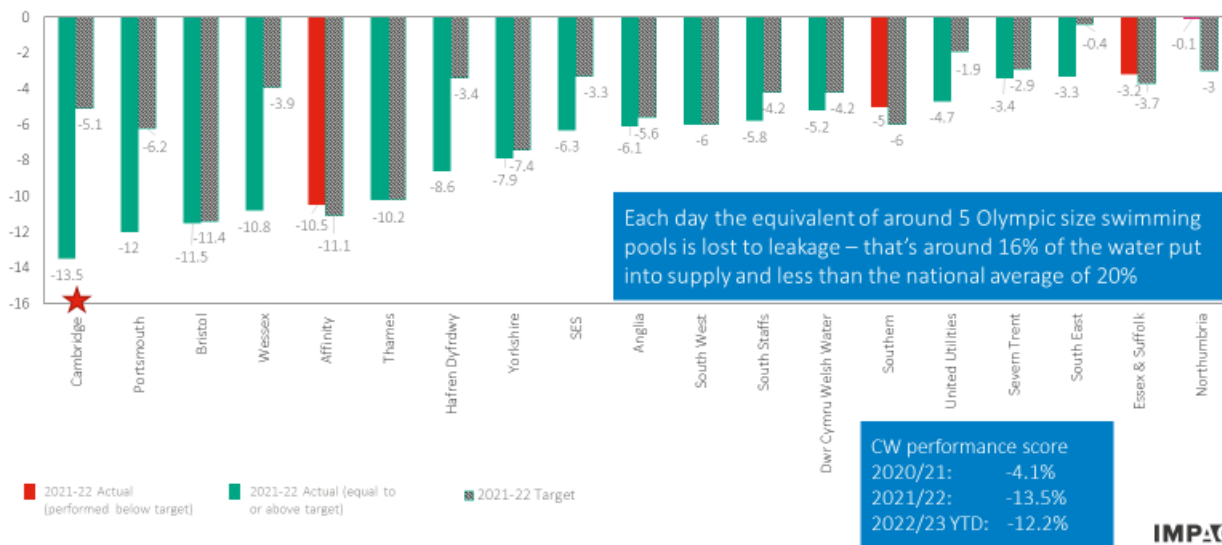
This bar chart includes information from Water UK taken from discoverwater.co.uk



Showcard H

Water companies are measured on the amount of water lost due to leaks from water mains and pipes

Change in three-year average leakage compared to baseline (%)

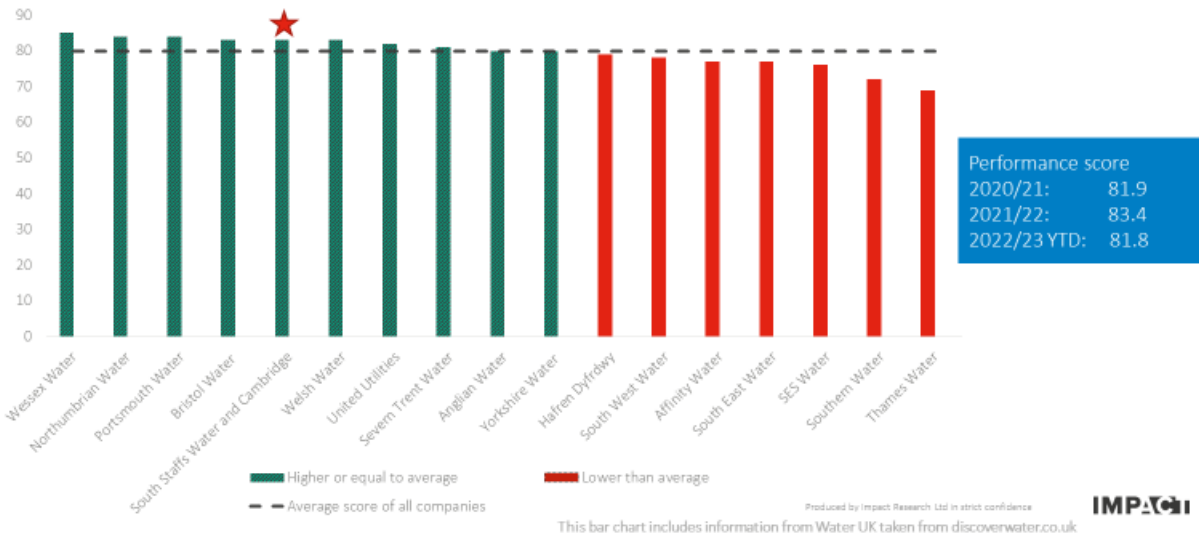


This bar chart includes information from Water UK taken from discoverwater.co.uk

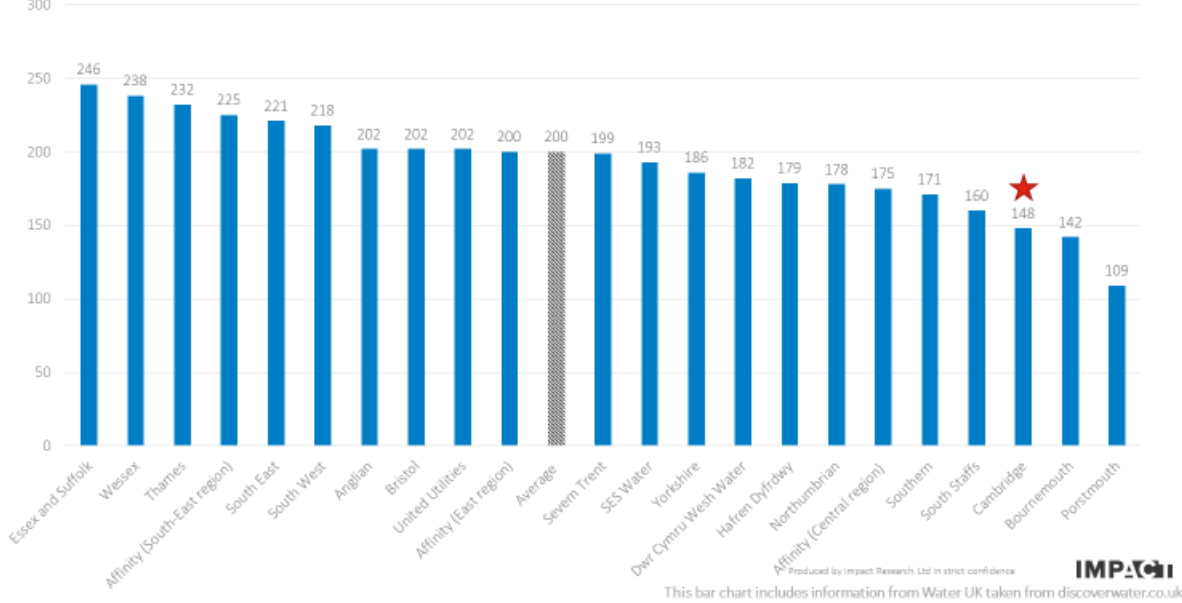


Water companies are measured on their customer service and experience performance

Water company's C-MeX score out of 100 for the year 2021-2022



The average annual household clean water bill for 2022-23 (£) - does not include sewerage charges



Expected changes to the annual household water bill charges for 2025-2030



The current average household bill for Cambridge Water customers is approximately:

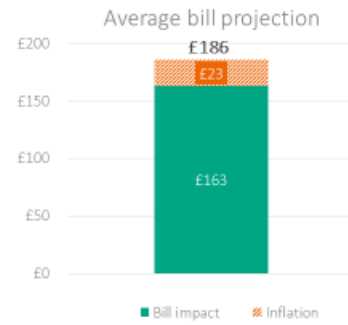
ANNUAL	£148
MONTHLY	£12.33



The expected average household bill for Cambridge Water customers for 2025-2030 is:

ANNUAL	£186*
MONTHLY	£15.50

*this also includes the expected impact of inflation over the period 2023-2030, which is forecast to be 2% from 2025

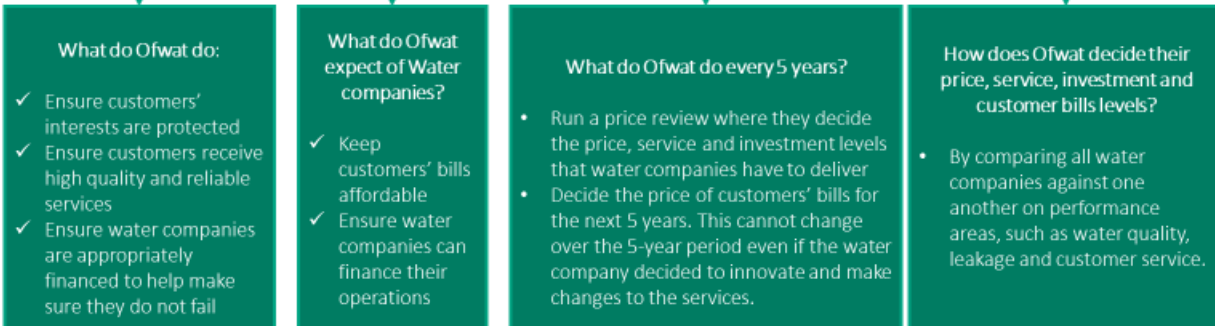


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Introduction to Ofwat – the economic regulator for the water industry

England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier



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Overview of water company financing of investments – The Problem



It costs millions to provide a reliable, safe water supply
To fund major investment programmes, companies have to borrow money which is subject to interest rates



Interests rates paid varies depending on:
1. The amount being borrowed
2. Period over which funds are borrowed
3. Type of financial products that are available at the time of borrowing



Larger companies have more freedom accessing funds and in larger quantities therefore are more able to take advantage of lower interest rates
This is harder for smaller water companies

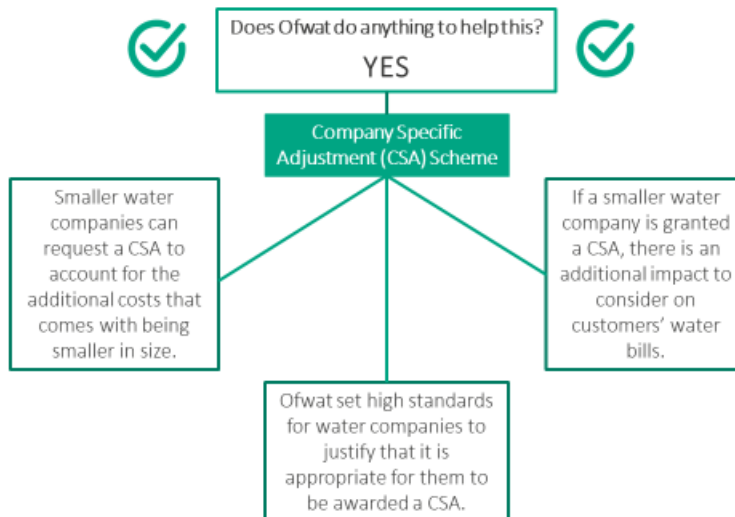


Smaller companies borrow less often, borrow lower amounts which can lead to higher interest rate
Therefore, by comparison, it costs smaller water companies more money to maintain its assets, such as its pipe network and treatment plants

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Overview of water company financing of investments – The Solution



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Cost of living increases

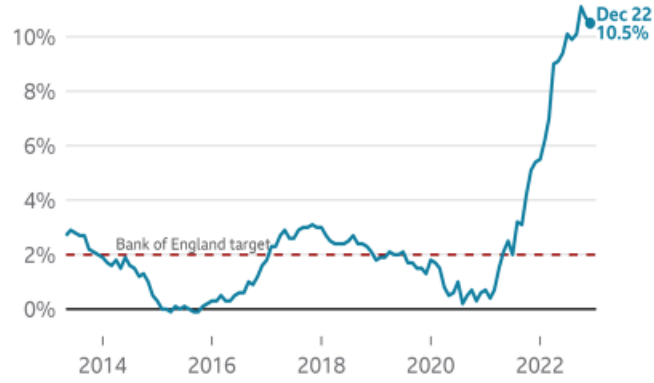
The cost of living started to become a problem for greater numbers of people during the COVID-19 pandemic in 2020-2021, and has been made worse by rising costs in almost every essential sector including energy, food, petrol and other everyday essentials.

Average wages are not increasing in line with the rising costs, mortgage rates have increased and many are still recovering from the impacts of the pandemic on their businesses.

In December 2022, inflation rose to 10.5%, the biggest rise since 1991.

Inflation at 10.5% in December 2022

Consumer Prices Index



Source: Office for National Statistics

BBC

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IMPACT

The amount that the CSA might cost on your clean water bill

This extra charge would be applied each year from 2025-2030 and would be an additional amount on the average household clean water bill

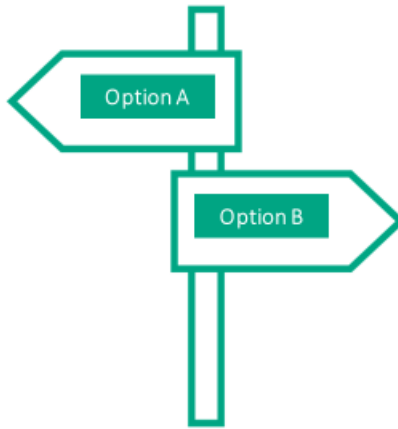


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IMPACT

Alternative options from 2025 – what would you prefer?

Cambridge Water implements the CSA and continues to operate the way it currently does and works to deliver its plans



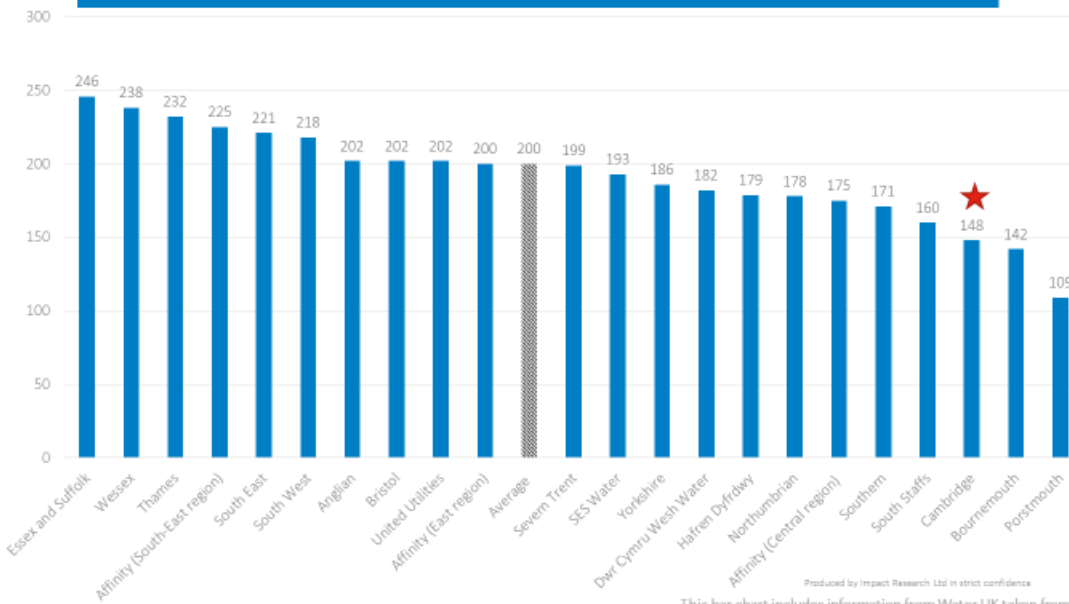
You are no longer served by Cambridge Water, but by a larger water company



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The average annual household clean water bill for 2022-23 (£) - does not include sewerage charges



Produced by Impact Research Ltd in strict confidence
 This bar chart includes information from Water UK taken from discoverwater.co.uk



SSW HH stimulus

Showcard O

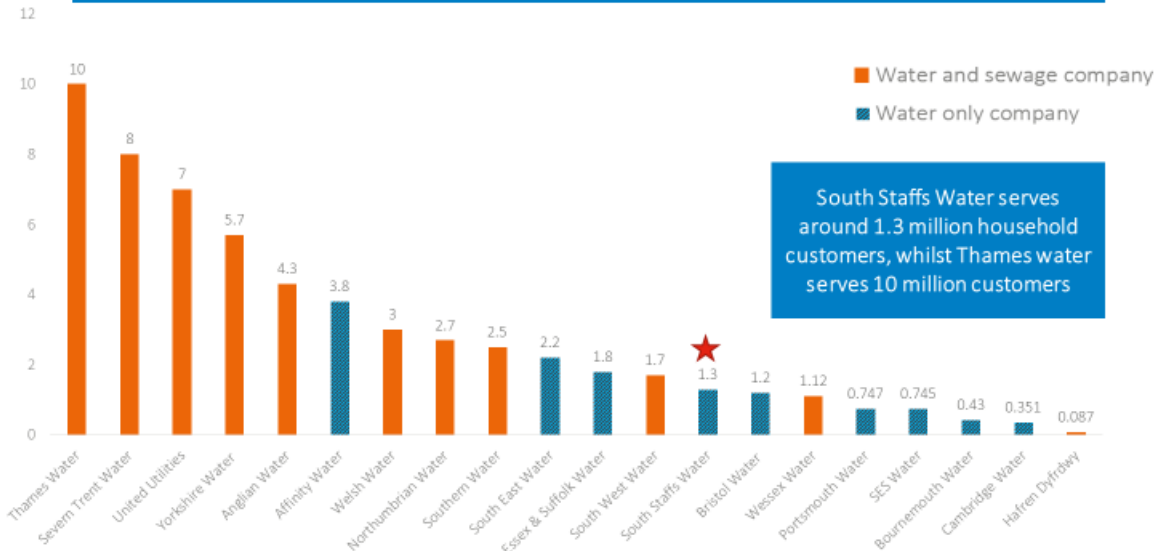


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Showcard A

Approximate number of customer properties currently served with drinking water - expressed in millions



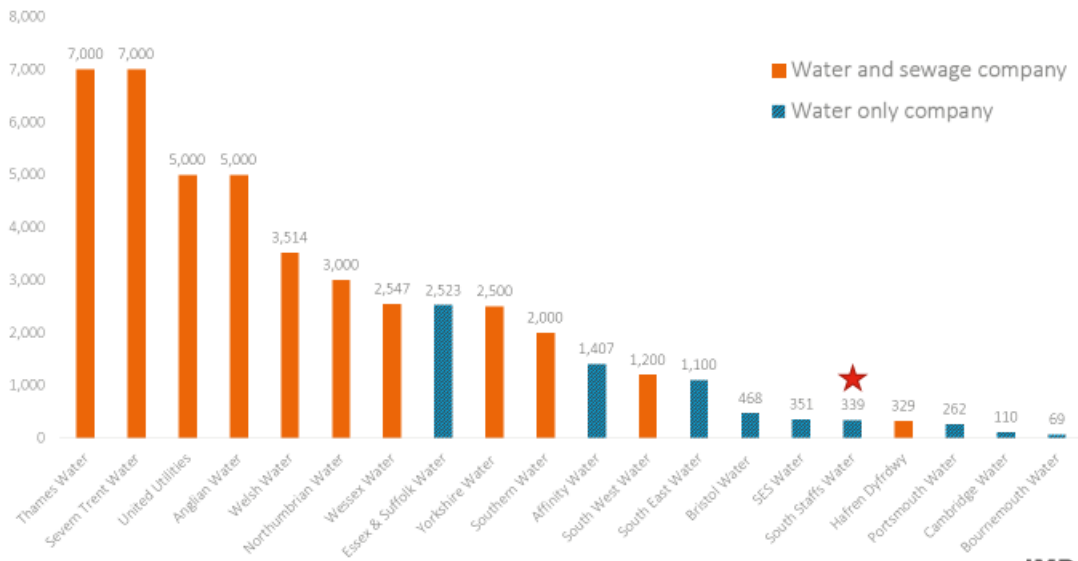
*Bristol and Bournemouth are both part of South West Water, and Hafren is part of the Severn Trent group

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Showcard B

Approximate number of employees for each water company



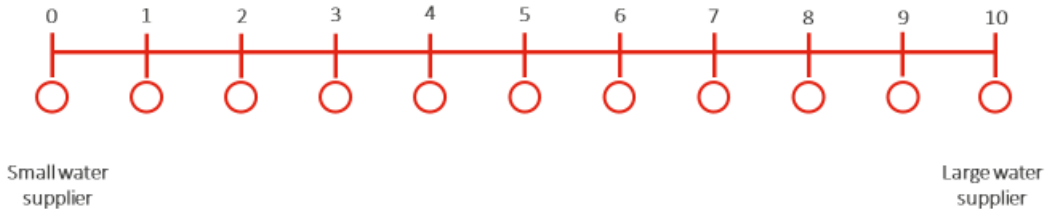
*Bristol and Bournemouth are both part of South West Water, and Hafren is part of the Severn Trent group

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Showcard C

Would you rather be served by a smaller water supplier, or a larger water supplier?
Please let us know where you sit on this scale.



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Showcard D

South Staffs Water Community and Environmental Initiatives



Education outreach in schools

Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.



SPRING - Environmental Protection Scheme

Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary on-farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

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WaterAid

For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Additional support for those who need extra help

The company supports over 48,700 households on low incomes by offering discounted water bills through their Assure tariff and over 57,600 on their priority services register who need extra help accessing their water services – e.g. bottled water drops if the water supply is cut off for a period.



Actively supporting local communities

South Staffs' outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub in Wednesbury for people to drop in to speak with the team.



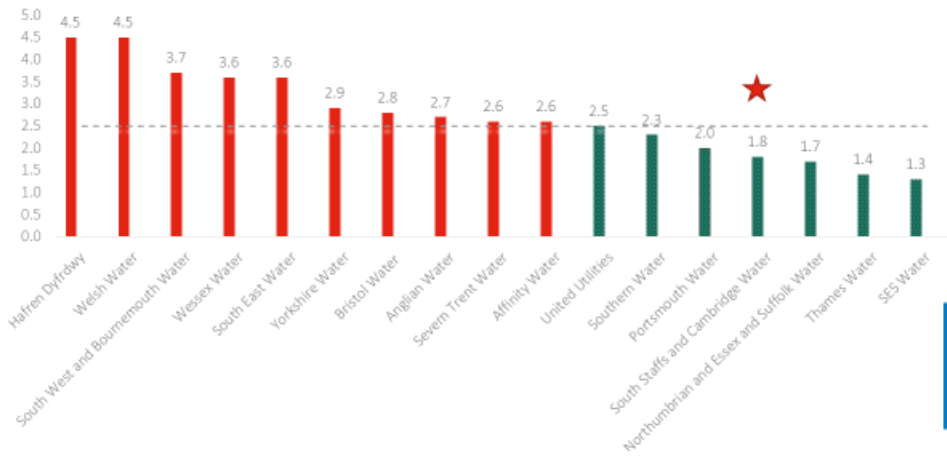
Produced by Impact Research Ltd in strict confidence



Showcard F

Water companies measure the number of customer contacts concerning their drinking water quality – e.g. on taste or smell of the water

Approx. number of times companies were contacted by customers about their water's taste and smell (per 10,000 properties supplied) – figures are for 2021/22



The industry average is 2.5 customer contacts per 10,000 properties supplied

Performance score
 2020/21: 2.0
 2021/22: 1.8
 2022/23 YTD: 1.6

This bar chart includes information from Water UK taken from discoverwater.co.uk

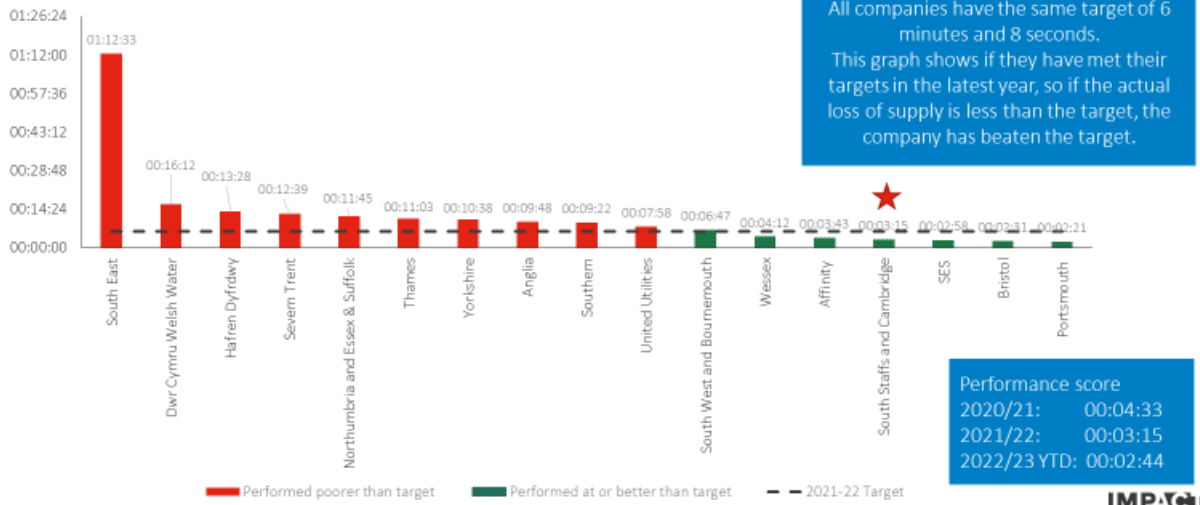
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Showcard G

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

Average minutes lost due to supply interruptions (per total properties served) against company targets



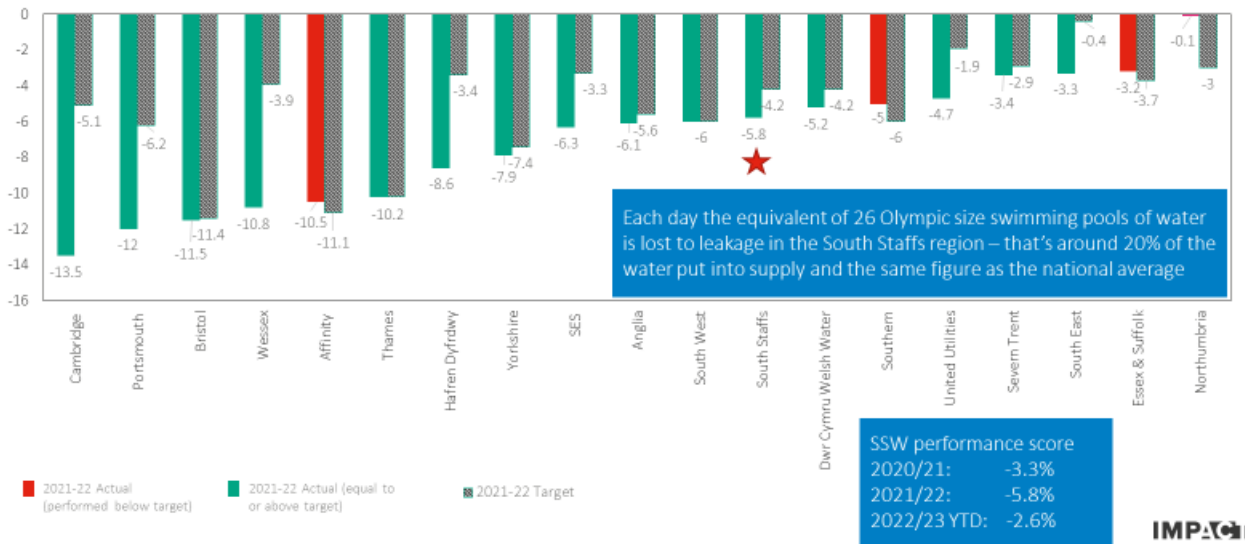
This bar chart includes information from Water UK taken from discoverwater.co.uk



Showcard H

Water companies are measured on the amount of water lost due to leaks from water mains and pipes

Change in three-year average leakage compared to baseline (%)

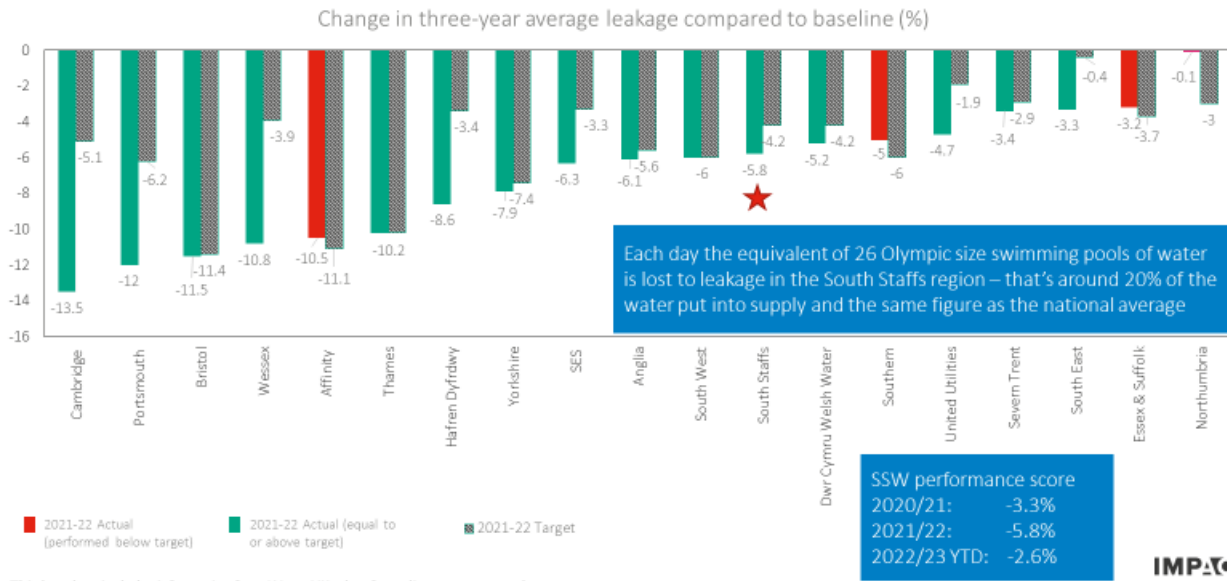


This bar chart includes information from Water UK taken from discoverwater.co.uk



Showcard H

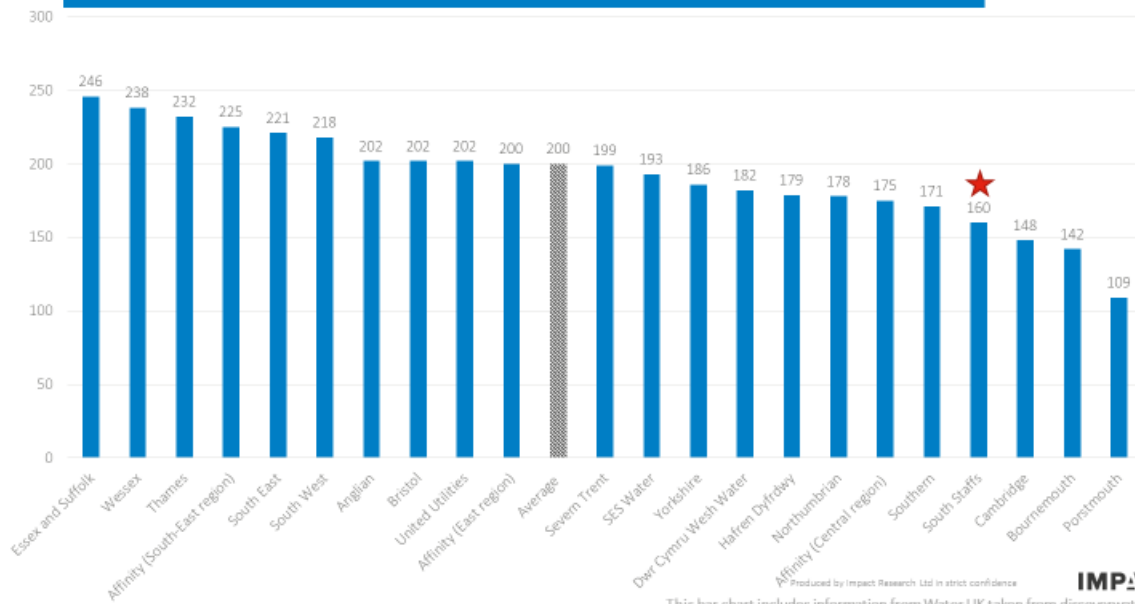
Water companies are measured on the amount of water lost due to leaks from water mains and pipes



This bar chart includes information from Water UK taken from discoverwater.co.uk

Showcard N

The average annual household clean water bill for 2022-23 (£)
 - does not include sewerage charges



Expected changes to the annual household water bill charges for 2025-2030



The current average household bill for South Staffs Water customers is approximately:

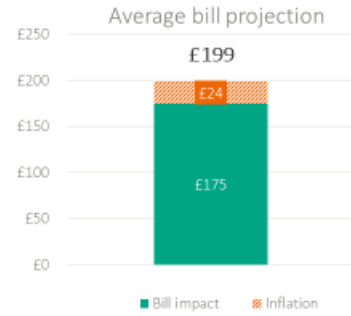
ANNUAL	£160
MONTHLY	£13.33



The expected average annual household bill for South Staffs Water customers for 2025-2030 is:

ANNUAL	£199*
MONTHLY	£16.58

*this also includes the expected impact of inflation over the period 2023-2030, which is forecast to be 2% from 2025

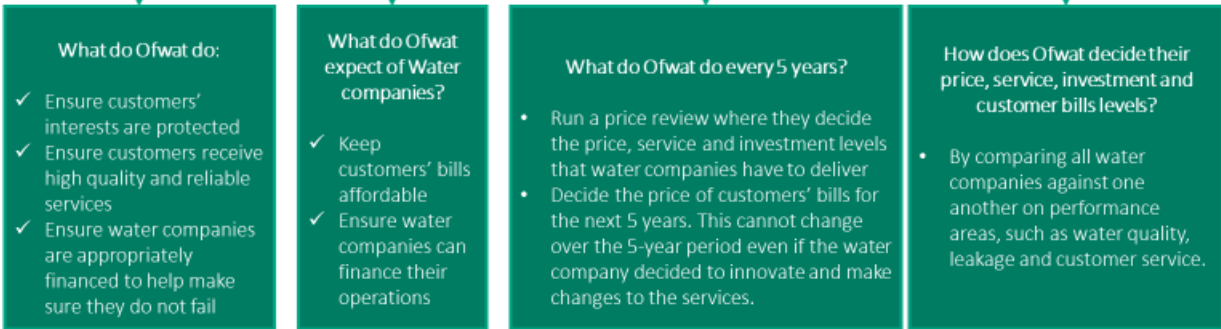


Produced by Impact Research Ltd in strict confidence



Introduction to Ofwat – the economic regulator for the water industry

England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier



Produced by Impact Research Ltd in strict confidence



Overview of water company financing of investments – The Problem



It costs millions to provide a reliable, safe water supply
To fund major investment programmes, companies have to borrow money which is subject to interest rates



Interests rates paid varies depending on:
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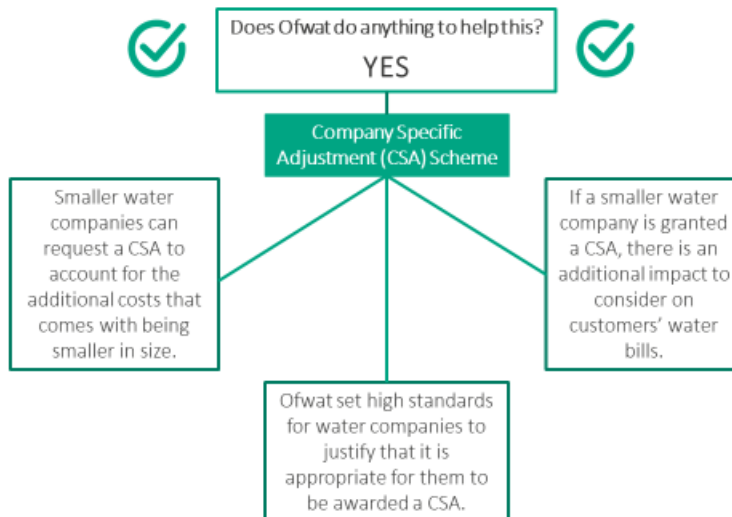


Smaller companies borrow less often, borrow lower amounts which can lead to higher interest rate
Therefore, by comparison, it costs smaller water companies more money to maintain its assets such as its pipe network and treatment plants

Produced by Impact Research Ltd in strict confidence



Overview of water company financing of investments – The Solution



Produced by Impact Research Ltd in strict confidence



Cost of living increases

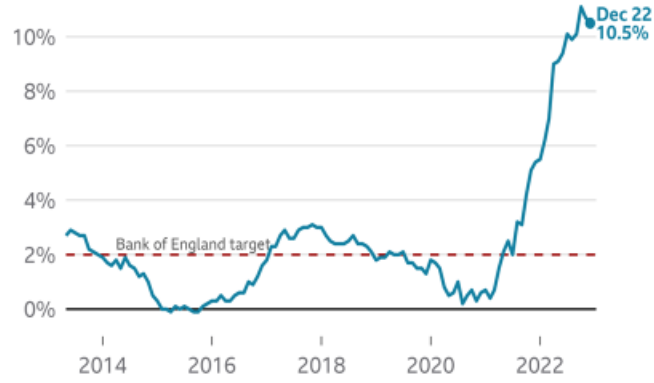
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In December 2022, inflation rose to 10.5%, the biggest rise since 1991.

Inflation at 10.5% in December 2022

Consumer Prices Index



Source: Office for National Statistics

BBC

Produced by Impact Research Ltd in strict confidence

IMPACT

The amount that the CSA might cost on your clean water bill

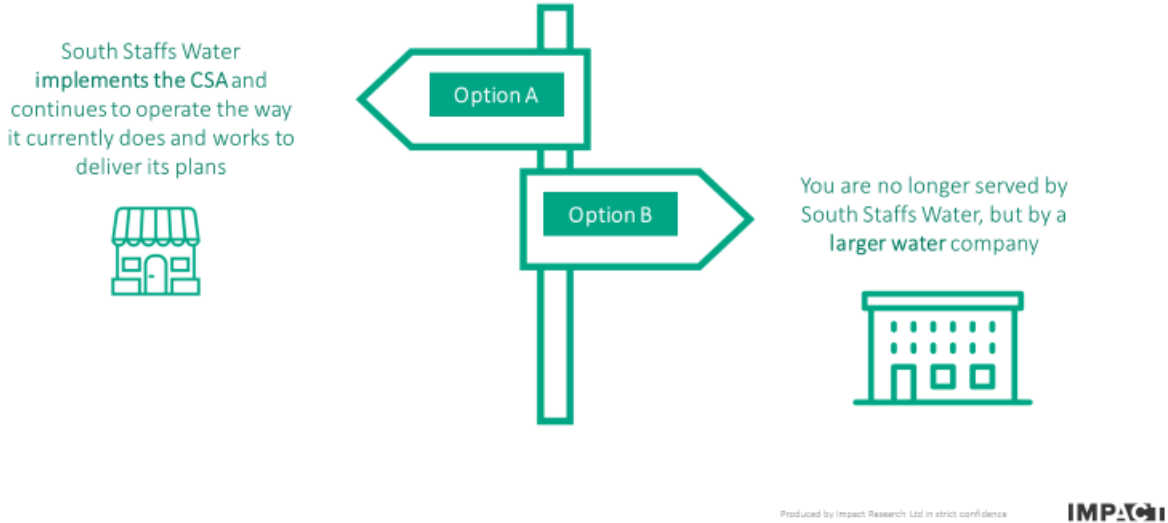
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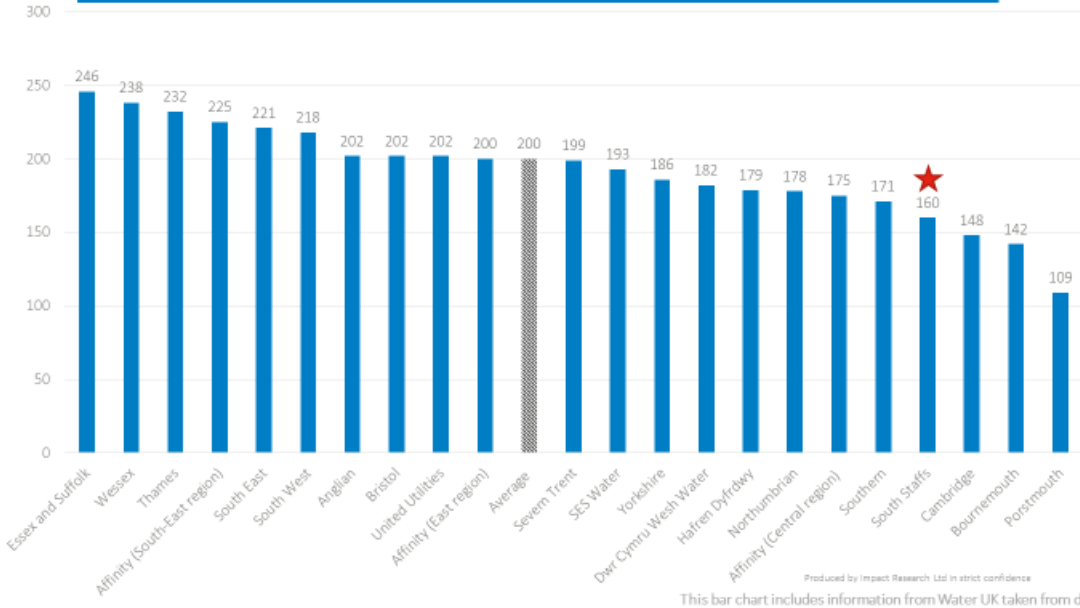
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IMPACT

Alternative options from 2025 – what would you prefer?



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CAM NHH stimulus

Showcard O

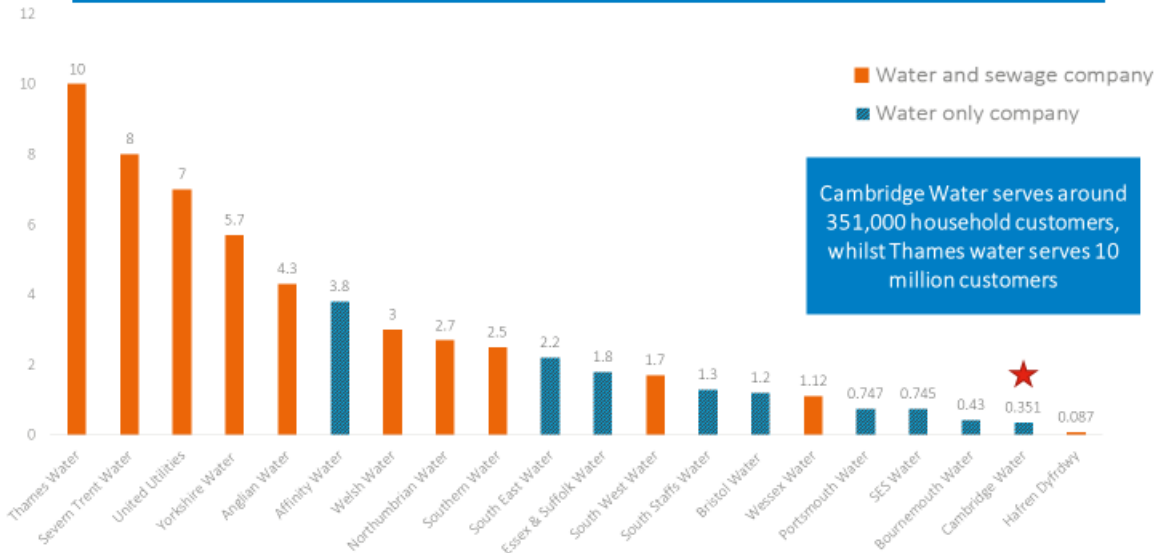


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Showcard A

Approximate number of customer properties currently served with drinking water - expressed in millions



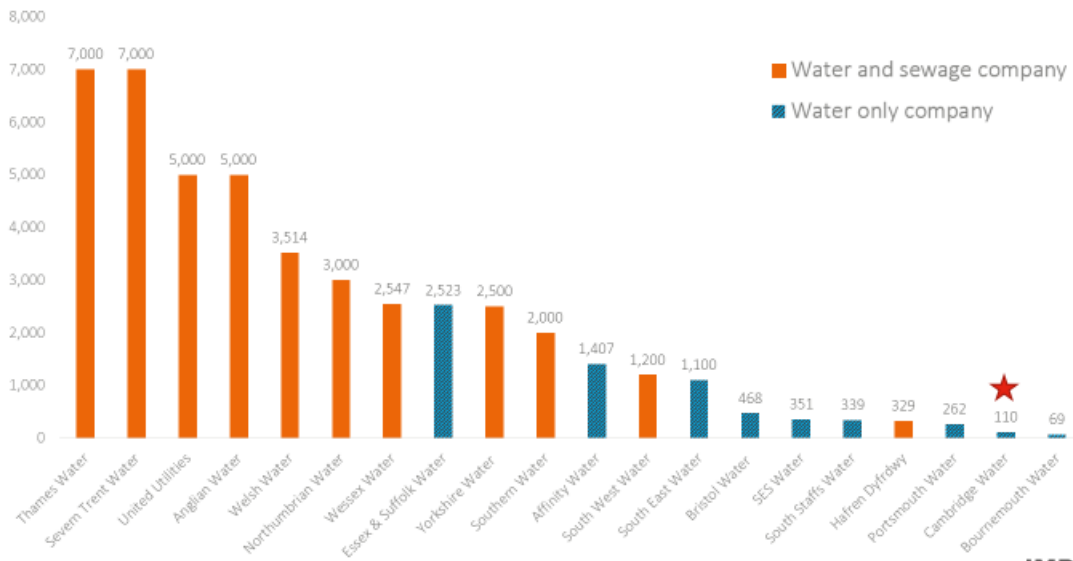
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Produced by Impact Research Ltd in strict confidence



Showcard B

Approximate number of employees for each water company



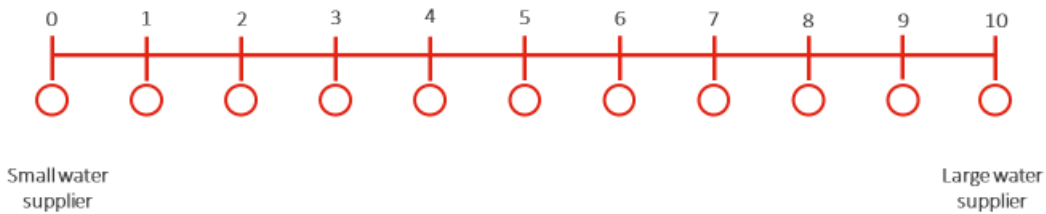
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Produced by Impact Research Ltd in strict confidence



Showcard C

Would you rather be served by a smaller water supplier, or a larger water supplier?
Please let us know where you sit on this scale.



Produced by Impact Research Ltd in strict confidence



Showcard D

South Staffs Water Community and Environmental Initiatives



Education outreach in schools
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.



SPRING - Environmental Protection Scheme
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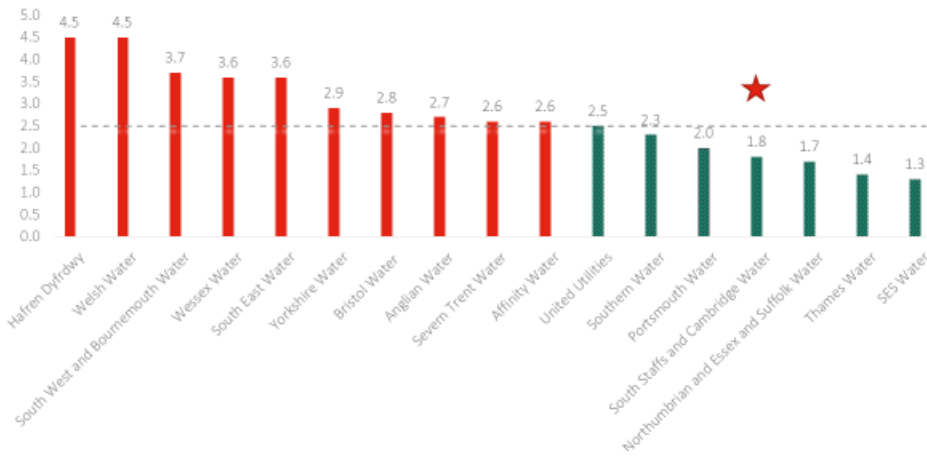
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Showcard F

Water companies measure the number of customer contacts concerning their drinking water quality – e.g. on taste or smell of the water

Approx. number of times companies were contacted by customers about their water's taste and smell (per 10,000 properties supplied) – figures are for 2021/22



The industry average is 2.5 customer contacts per 10,000 properties supplied

Performance score
2020/21: 2.0
2021/22: 1.8
2022/23 YTD: 1.6

Legend: ■ Performed poorer than average ■ Performed at or better than average — 2021-22 Average

Produced by Impact Research Ltd in strict confidence

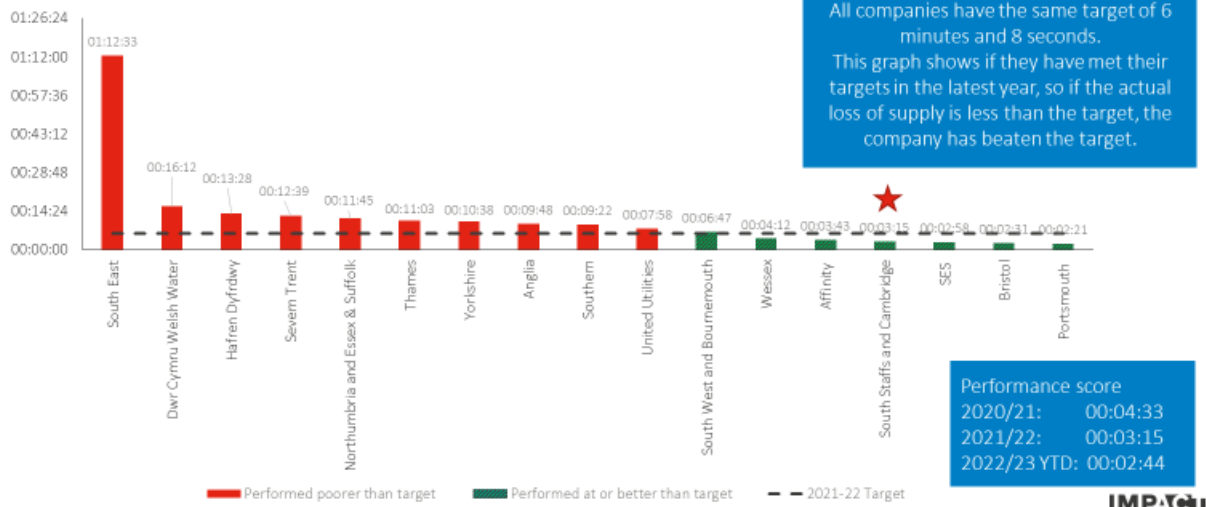


This bar chart includes information from Water UK taken from discoverwater.co.uk

Showcard G

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

Average minutes lost due to supply interruptions (per total properties served) against company targets



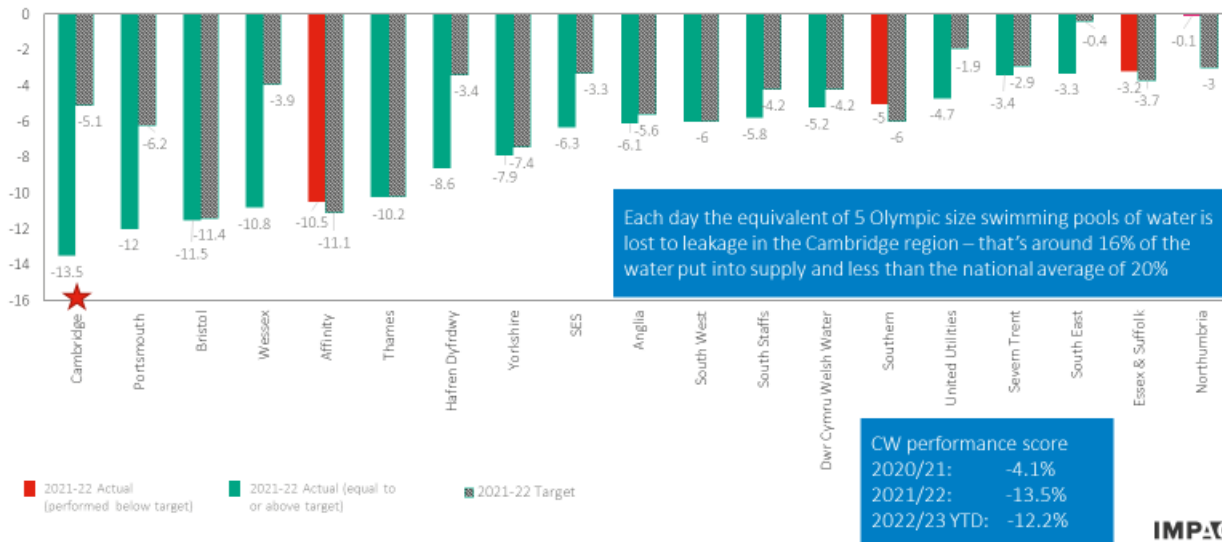
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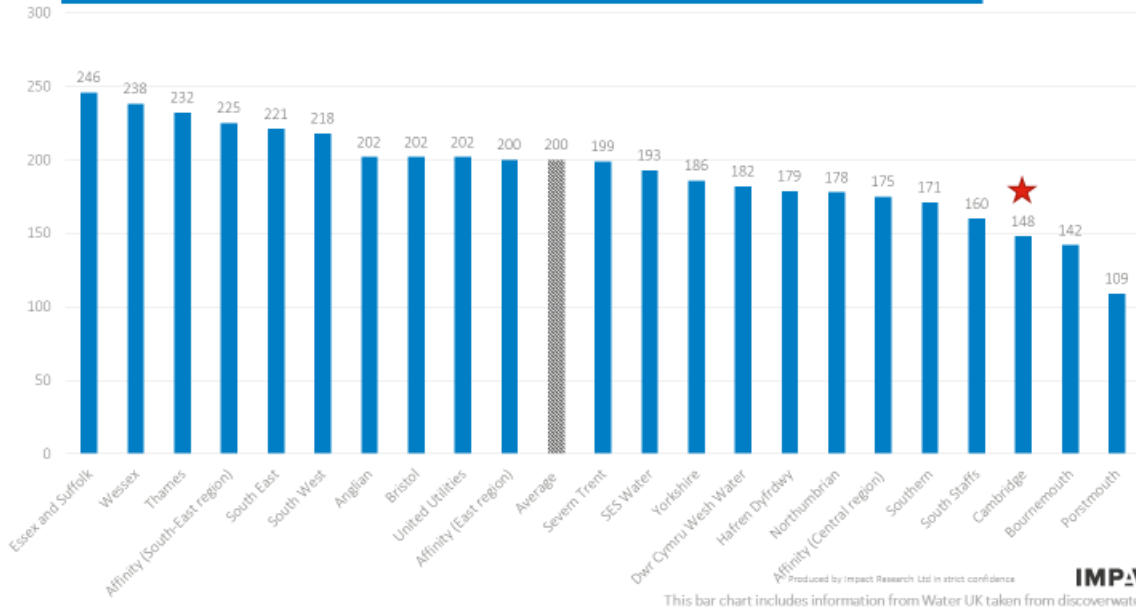


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Showcard N

The average annual household clean water bill for 2022-23 (£)
- does not include sewerage charges



Showcard Q

Expected changes to your organisation's water bill charges for 2025-2030



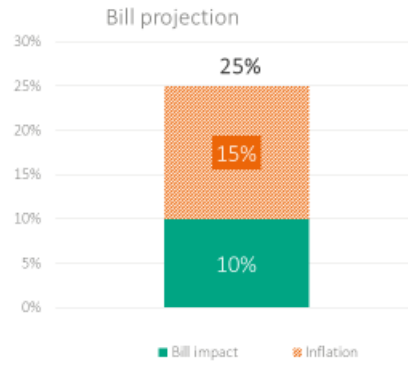
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ANNUAL **25%**

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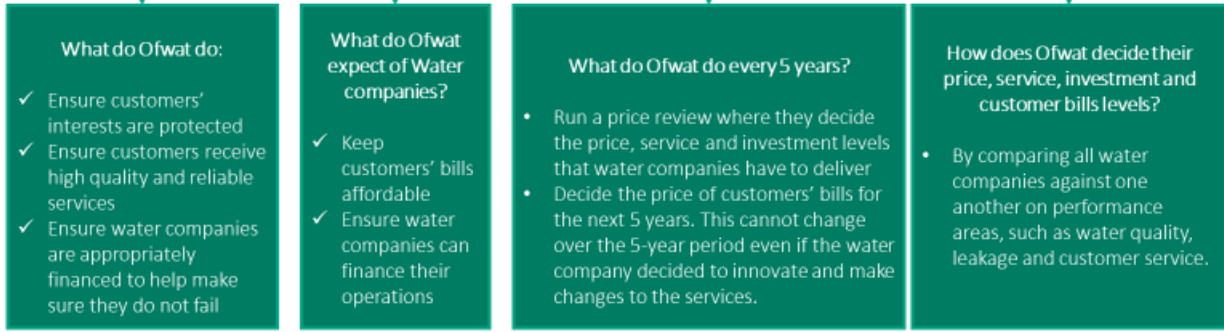


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IMPACT

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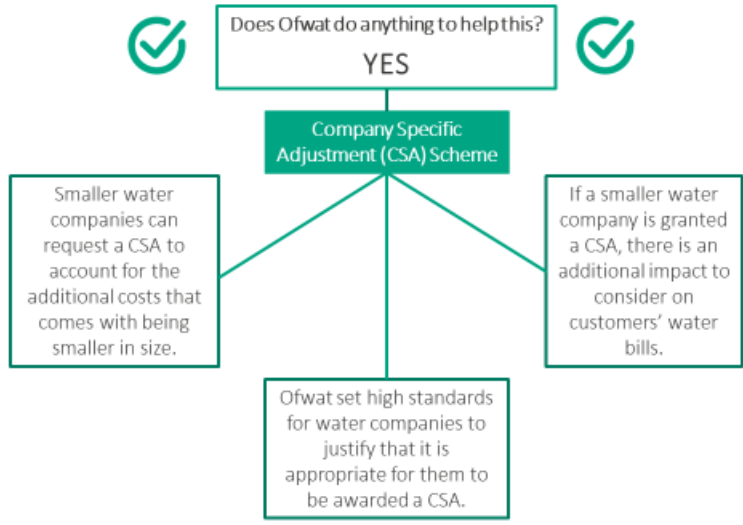


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Produced by Impact Research Ltd in strict confidence **IMPACT**

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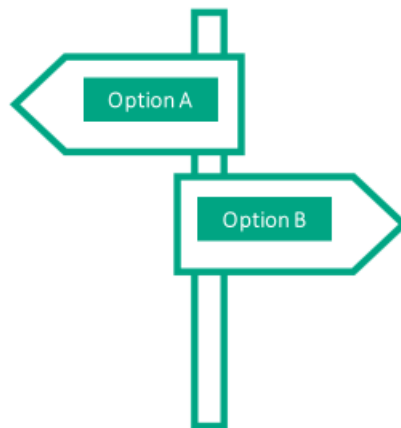


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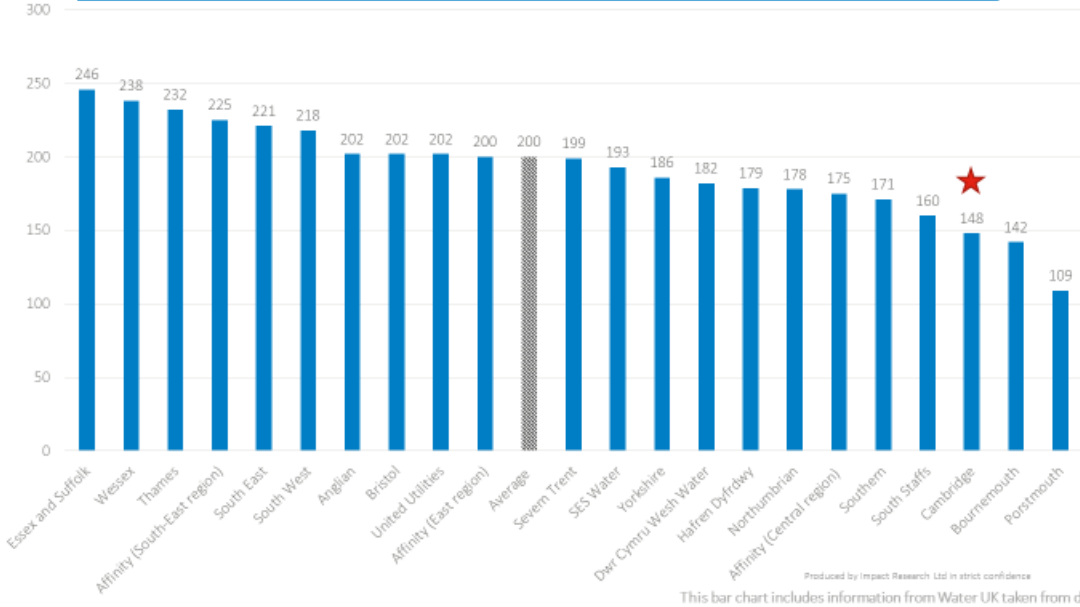
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SSW NHH stimulus

Showcard O

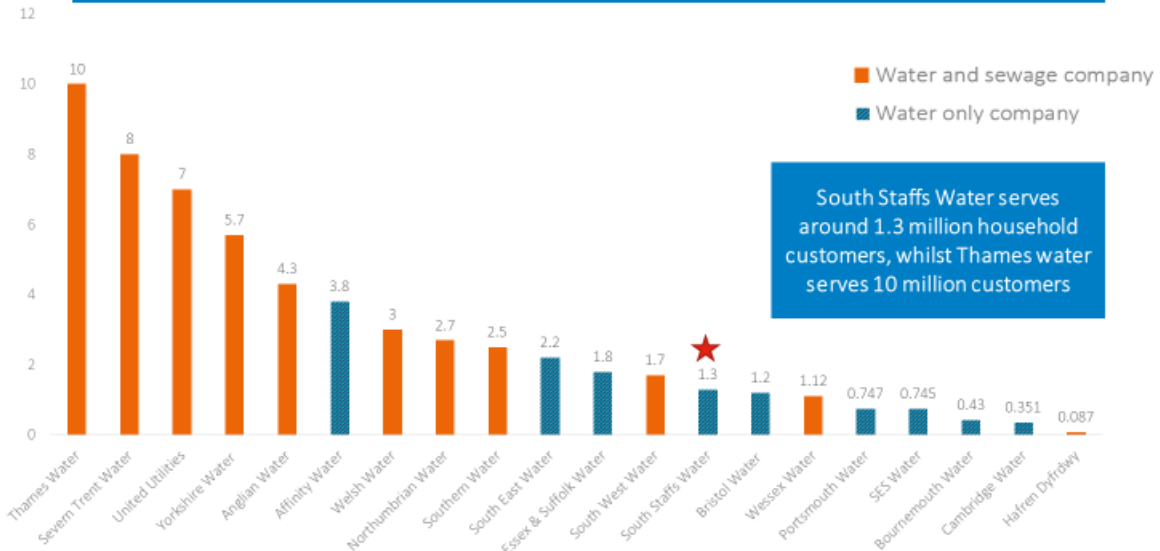


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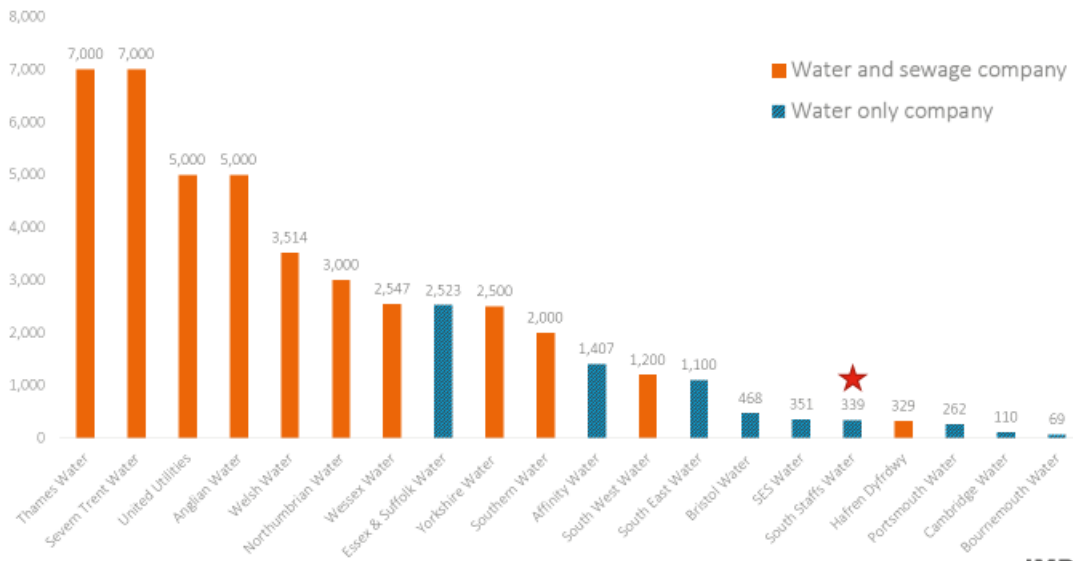
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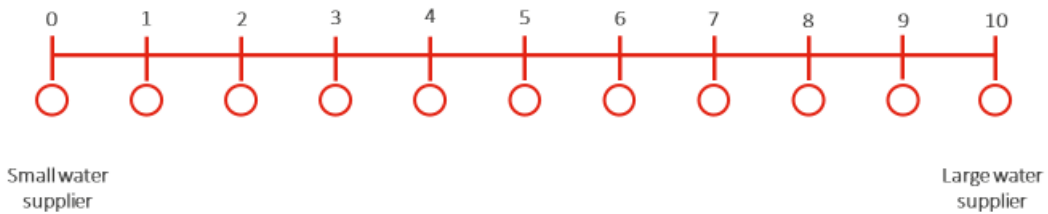
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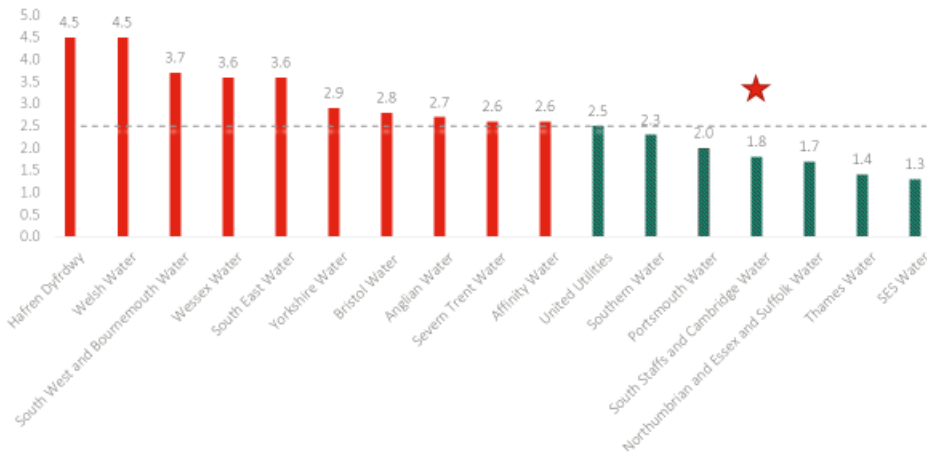
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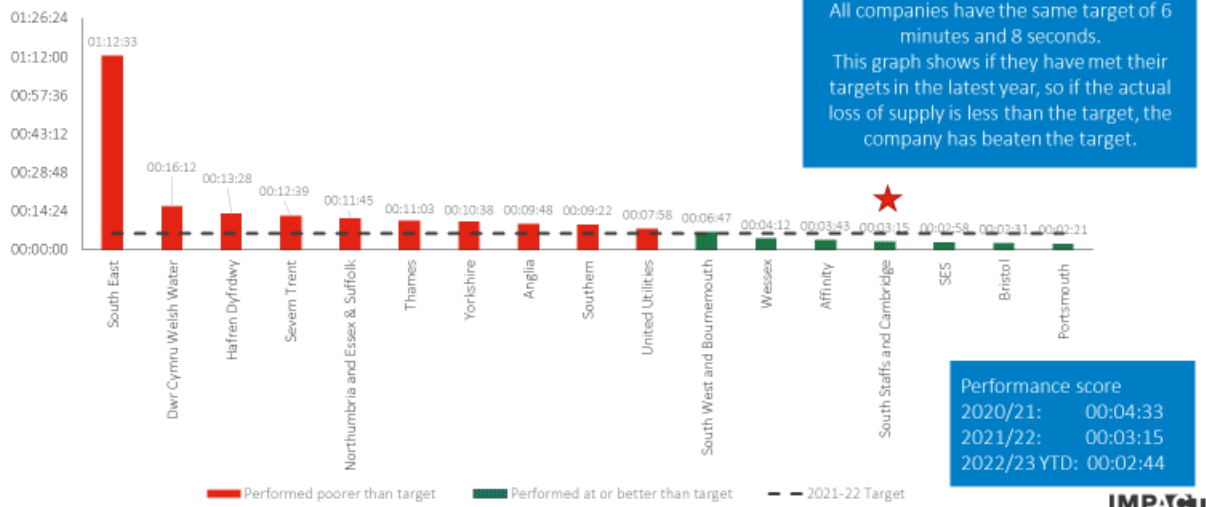


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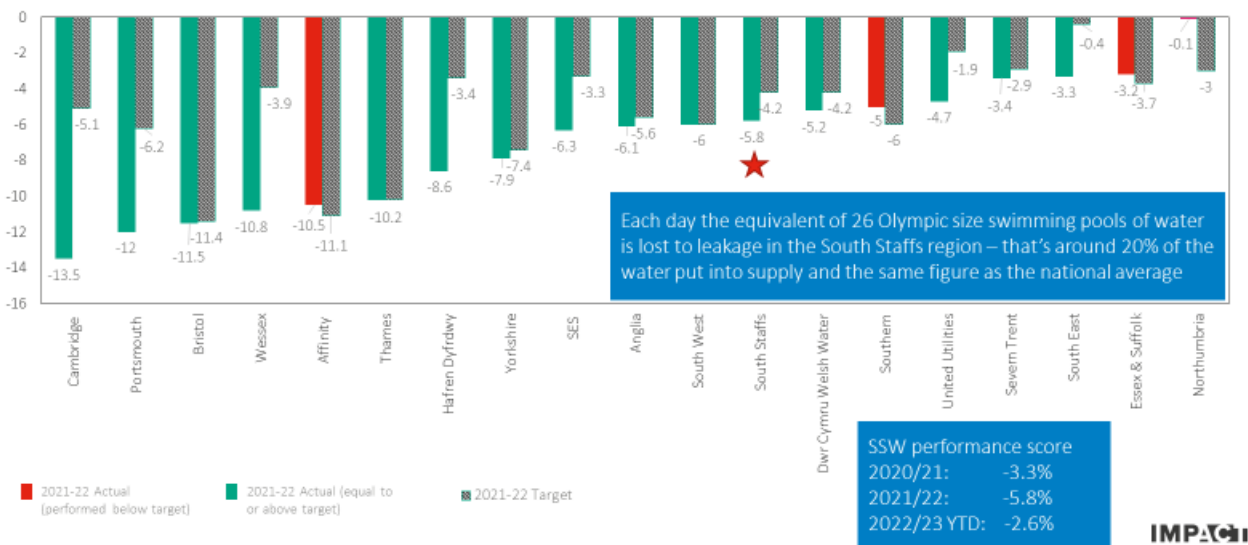
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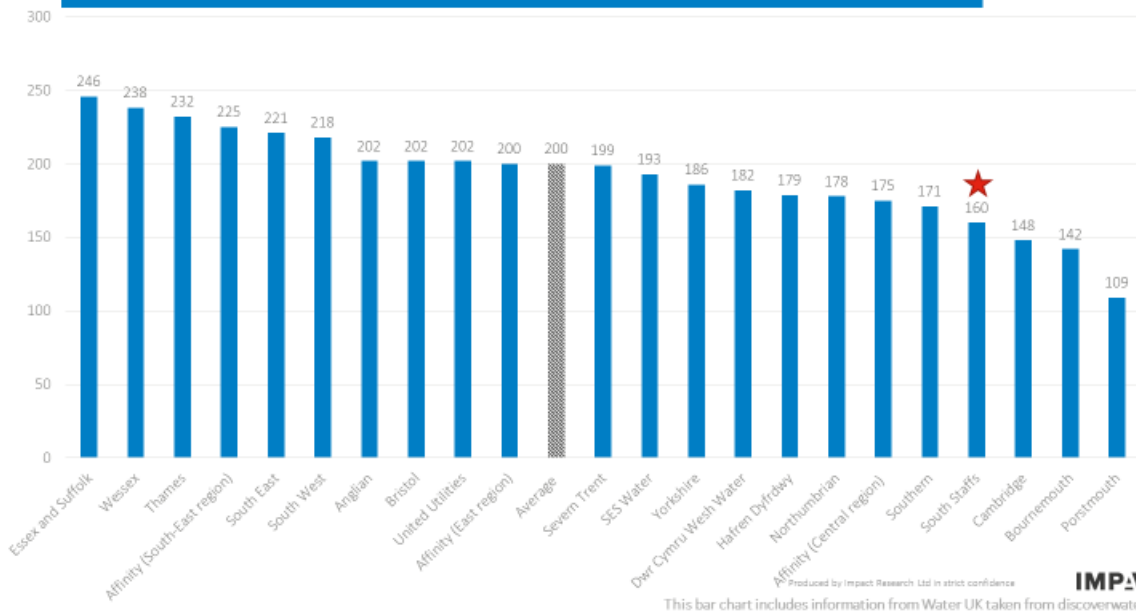


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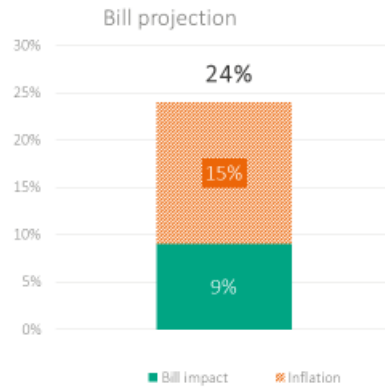


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ANNUAL

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IMPACT

Introduction to Ofwat – the economic regulator for the water industry

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Ofwat

What do Ofwat do:

- ✓ Ensure customers' interests are protected
- ✓ Ensure customers receive high quality and reliable services
- ✓ Ensure water companies are appropriately financed to help make sure they do not fail

What do Ofwat expect of Water companies?

- ✓ Keep customers' bills affordable
- ✓ Ensure water companies can finance their operations

What do Ofwat do every 5 years?

- Run a price review where they decide the price, service and investment levels that water companies have to deliver
- Decide the price of customers' bills for the next 5 years. This cannot change over the 5-year period even if the water company decided to innovate and make changes to the services.

How does Ofwat decide their price, service, investment and customer bills levels?

- By comparing all water companies against one another on performance areas, such as water quality, leakage and customer service.

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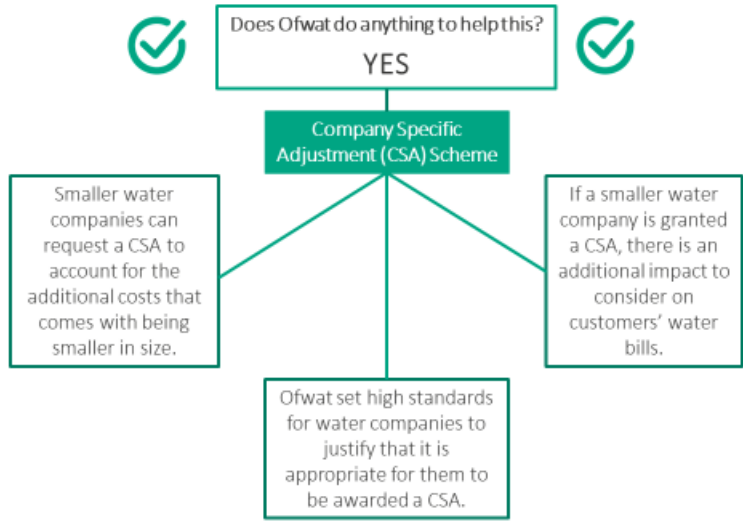


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Produced by Impact Research Ltd in strict confidence **IMPACT**

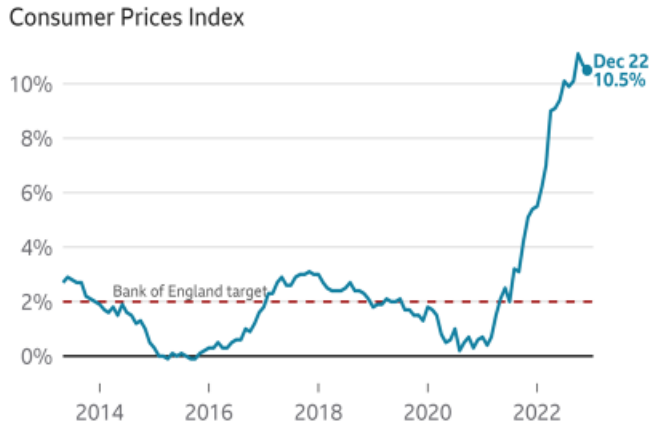
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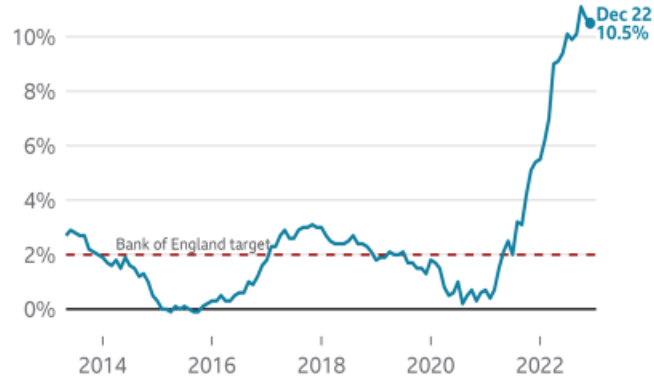
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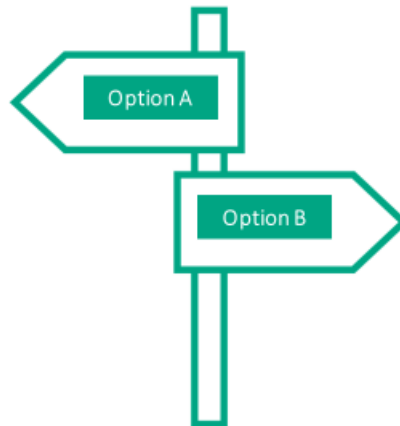
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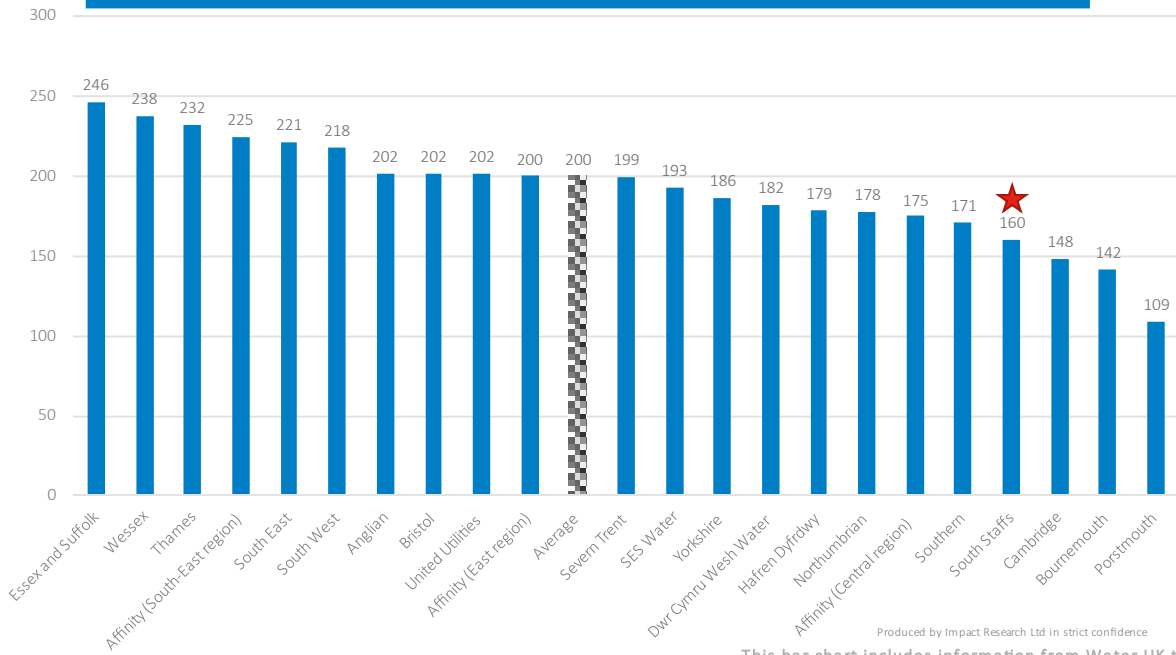
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IMPACT

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Produced by Impact Research Ltd in strict confidence **IMPACT**
 This bar chart includes information from Water UK taken from disclose

Quantitative surveys

CAM H2Online

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of Cambridge Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 1) Journalism **CLOSE**
- 2) Water Supply or Wastewater services **CLOSE**
- 3) Market Research **CLOSE**
- 4) Academia **CLOSE**
- 5) None of the above **ANCHOR, EXCLUSIVE**

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

- 1) Yes =Qualify for **NHH**
- 2) No - **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

- 1) I solely or jointly manage the water bills
- 2) I don't have any involvement in the water bills **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

1. Home/residential premises **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
2. Separate business premises
3. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

1. Paid directly
2. Included in rent **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
3. **Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR**

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

1. Public sector (e.g., local government, civil service, the NHS, higher education)
2. Private sector (e.g., manufacturing, financial services, hospitality, retail)
3. Charity sector
4. Other **ANCHOR**

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing
- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home **[DOMESTIC]** /workplace **[NHH]**?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

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PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**

- HH F2F
- NHH RECRUIT TO ONLINE

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

1. Sole trader
2. 2-9
3. 10-19
4. 20-49
5. 50-99
6. 100-249
7. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

1. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
2. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
3. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
4. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

1. B **CLASSIFY AS SSW**
2. DE **CLASSIFY AS SSW**
3. DY **CLASSIFY AS SSW**
4. ST **CLASSIFY AS SSW**

5. WS **CLASSIFY AS SSW**
6. WV **CLASSIFY AS SSW**
7. CV **CLASSIFY AS SSW**
8. CB **CLASSIFY AS CAM**
9. PE **CLASSIFY AS CAM**
10. SG **CLASSIFY AS CAM**

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

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <**PIPE IN** South Staffs Water if **S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13)** or Cambridge Water if **S13 = CB, PE or SG (8-10 at S13)**>, is this correct?

1. Yes
2. No **THANK AND CLOSE**
3. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 1) Under 18 years old **CLOSE**
- 2) 18 to 24
- 3) 25 to 29
- 4) 30 to 34
- 5) 35 to 44
- 6) 45 to 54
- 7) 55 to 59
- 8) 60 to 74
- 9) 75 or over
- 10) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

1. I have complete responsibility for payment
2. I have shared responsibility for payment with others in my household
3. I have no responsibility, but I know it is paid by my landlord and included in my rent
4. I have no responsibility for payment and I don't know who pays the bills
5. Other
6. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 1) Male
- 2) Female
- 3) Non-binary or other
- 4) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- 1) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 2) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 3) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 4) 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.)
- 5) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 6) Student
- 7) Casual worker – not in permanent employment
- 8) Housewife/ Homemaker
- 9) Retired and living on state pension
- 10) Retired and not living on state pension
- 11) Unemployed or not working due to long-term sickness
- 12) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

1. Yes – I/we asked to have one installed
2. Yes – it was already in the property when I/we moved in
3. Yes – I/we had to have it fitted, but I/we didn't really want it installed
4. No – and I/we not interested in getting one
5. No – but I/we are considering getting one
6. No – I/we had one, but decided to opt out
7. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water **bill**.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99. Don't know **EXCLUSIVE**

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month
 £29 - £32 per month
 £33 - £37 per month
 £38 - £41 per month
 £42 - £45 per month
 £46 - £50 per month
 £51 - £54 per month
 £55 - £59 per month
 £60 - £64 per month
 £65 - £69 per month
 £70 - £75 per month
 £76 - £83 per month
 £84+ per month

Annual

Less than £150 per year
 £151 - £200 per year
 £201 - £250 per year
 £251 - £300 per year
 £301 - £350 per year
 £351 - £400 per year
 £401 - £450 per year
 £451 - £500 per year
 £501 - £550 per year
 £551 - £600 per year
 £601 - £650 per year
 £651 - £700 per year
 £701 - £750 per year
 £751 - £800 per year
 £801 - £900 per year
 £901 - £1,000 per year
 £1,001+ per year
 98. Don't know
 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	£100
£13 - £16 per month	£151 - £200 per year	£175
£17 - £20 per month	£201 - £250 per year	£225
£21 - £24 per month	£251 - £300 per year	£275
£25 - £28 per month	£301 - £350 per year	£325
£29 - £32 per month	£351 - £400 per year	£375
£33 - £37 per month	£401 - £450 per year	£425

£38 - £41 per month	£451 - £500 per year	£475
£42 - £45 per month	£501 - £550 per year	£525
£46 - £50 per month	£551 - £600 per year	£575
£51 - £54 per month	£601 - £650 per year	£625
£55 - £59 per month	£651 - £700 per year	£675
£60 - £64 per month	£701 - £750 per year	£725
£65 - £69 per month	£751 - £800 per year	£775
£70 - £75 per month	£801 - £900 per year	£850
£76 - £83 per month	£901 - £1,000 per year	£950
£84+ per month	£1,001+ per year	£1,050
Don't know		£155 (SS Metered) £164 (SS Unmetered) £141 (CW Metered) £170 (CW Unmetered)
Prefer not to say		£155 (SS Metered) £164 (SS Unmetered) £141 (CW Metered) £170 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM

Compared with other customers, that's quite a high bill.

If this doesn't look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3))

A typical annual clean water bill for a household customer in your area is currently around (TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141) per year.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF UNMETERED OR DON'T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:

For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services



Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation's water bill.

S ASK NHHs. Show image 'how the water retail market works'

Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

- 1) One bill covering both clean water and waste water services
- 2) A separate bill for clean water and a separate bill for waste water

3) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

- Less than £13 per month (Less than £150 per year) – MIDPOINT £100
- £13 - £16 per month (£151 - £200 per year) – MIDPOINT £175
- £17 - £23 per month (£201 - £300 per year) – MIDPOINT £250
- £24 - £40 per month (£301 - £500 per year) – MIDPOINT £400
- £41 - £64 per month (£501 - £750 per year) – MIDPOINT £625
- £65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875
- £84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500
- £167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000
- £334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000
- £501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000
- £834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
- £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
- £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
- £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
- £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
- £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
- £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
- Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>

200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water)**.

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(£A) per year on its total water bill. This means your organisation spends around £(£A x0.37 CAM OR x0.46 SSW – PN: Calculate)) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(£A) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(£A) per year on its total water bill. This means that your organisation spends around £(£A x0.37 CAM OR

x0.46 SSW) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(**EA**) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately £(**EA = MIDPOINT VALUE FROM Q1b x0.37 CAM OR x0.46 SSW**) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £(EA = MIDPOINT VALUE FROM Q1b) Thanks for confirming, we estimate that your organisation spends approximately **Q1b**) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use £[**TEXT SUB FROM C1c**] per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your <**PIPE IN** household if **QUIDSAMPLE = DOMESTIC OR** organisation IF **QHIDSAMPLE = NHH**> to afford your current clean water bill?

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**>. The following questions will relate to the provision of clean water to your home (if **domestic**) or place or work (**NHH**). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if **South Staffs**) / Anglian Water (if **CAM**).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied									Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money				Very good value for money	Don't know
1	2	3	4	5	98

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 1) Had to raise a query about your water bill
- 2) Had to raise a query about a water meter or installing a meter
- 3) Needed to raise a customer service complaint, or one about your water supply
- 4) Discolouration of water coming out of your tap
- 5) A change to the taste and/or smell of your tap water
- 6) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 7) A temporary loss of water supply - for more than one hour
- 8) A leak in the underground pipe that supplies water to your property from the mains pipe
- 9) Low water pressure
- 10) Flooding from a burst pipe
- 11) A hose pipe ban
- 12) Traffic disruption caused by water works
- 13) Other (please specify) **ANCHOR**
- 14) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

NEW PAGE

SHOW ALL

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)

About South Staffs Water



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

- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge

About Cambridge Water



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

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall

To give you an idea of their size you'll see below some facts and figures about Cambridge Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers

0	1	2	3	4	5	6	7	8	9	10

MC ASK ALL

Q7 Like most water companies, <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>.

SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D

Cambridge Water Community and Environmental Initiatives

- Education outreach in schools**
Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.
- Employee Volunteering**
Donate around 400 volunteer days to the local community every year.
- WaterAid**
Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.
- Community Vehicle/Water on Wheels'**
Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.
- Additional support for those who need extra help**
The company supports over 360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 in their priority services register who need extra help accessing their water services- e.g. bottled water drops if the water supply is cut off for a period.
- PEBBLE biodiversity fund**
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.
- SPRING Environmental Protection Scheme**
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence. IMP:TOI

Showcard D

South Staffs Water Community and Environmental Initiatives

- Education outreach in schools**
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.
- Employee Volunteering**
Donate around 400 volunteer days to the local community every year.
- WaterAid**
For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.
- Additional support for those who need extra help**
The company supports over 8,700 households on low incomes by offering discounted water bills through the Assure tariff and over 6,600 in their priority services register who need extra help accessing their water services- e.g. bottled water drops if the water supply is cut off for a period.
- SPRING Environmental Protection Scheme**
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.
- Actively supporting local communities**
South Staffs' outreach team outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub in Wednesbury for people to drop in to speak with the team.

Produced by Impact Research Ltd in strict confidence. IMP:TOI

Which of these were you aware of before you took part in this study?

1. Education outreach
2. Employee volunteering
3. WaterAid
4. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
5. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
6. Additional support for those who need extra help
7. PEBBLE biodiversity fund
8. SPRING Environmental Protection Scheme
9. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water's Performance

Show all

Over the next few screens we'll show you some charts that highlight how <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we'll show you three as examples.

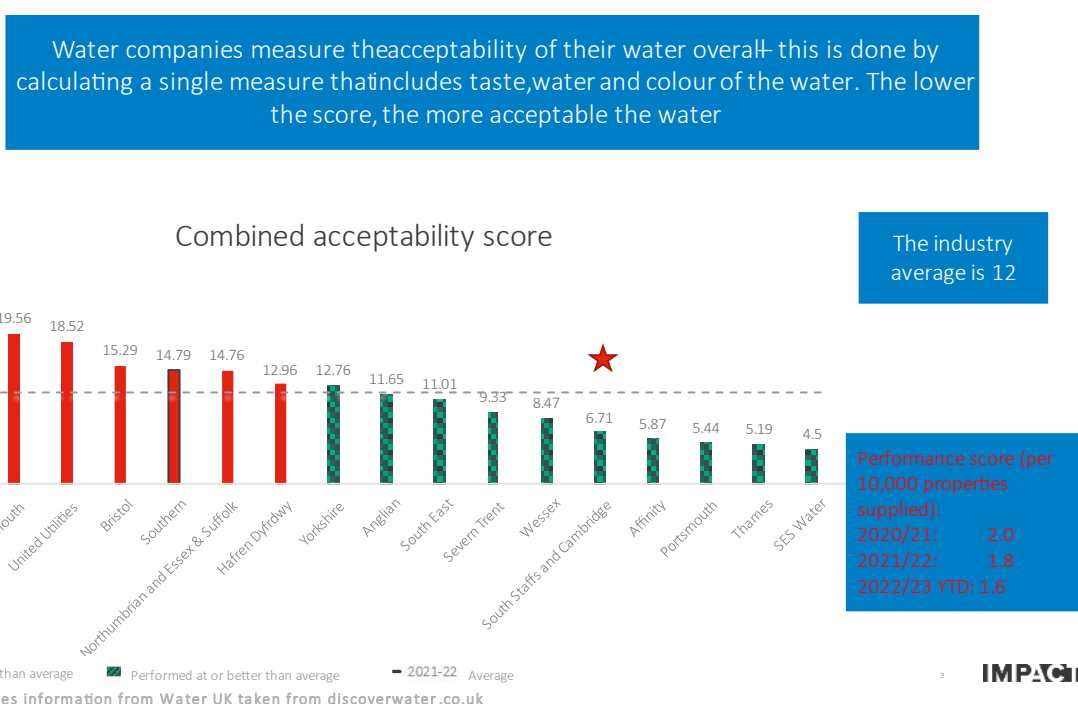
South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company's water is.

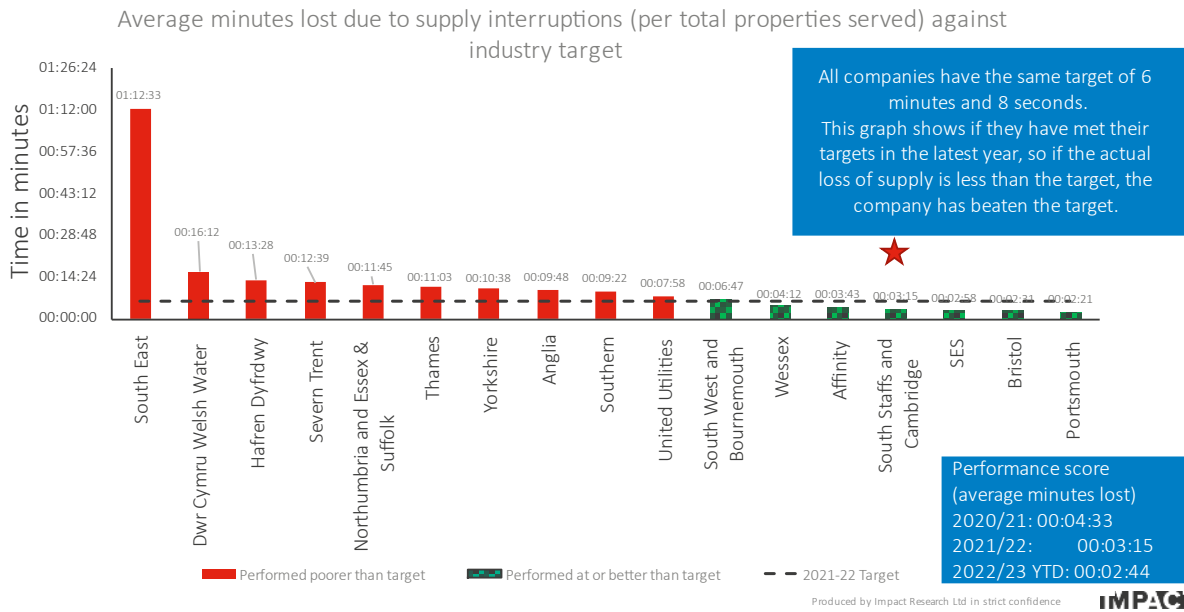


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

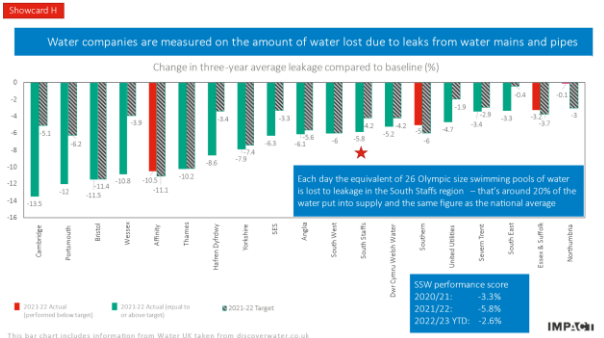
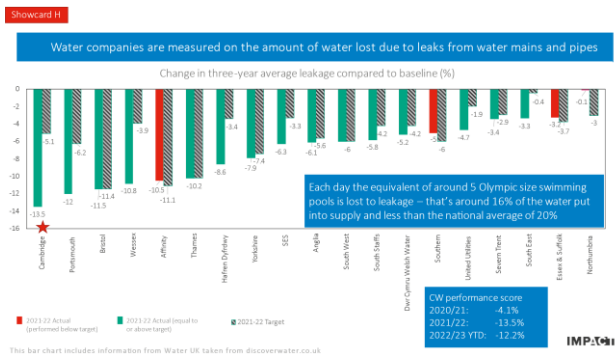
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

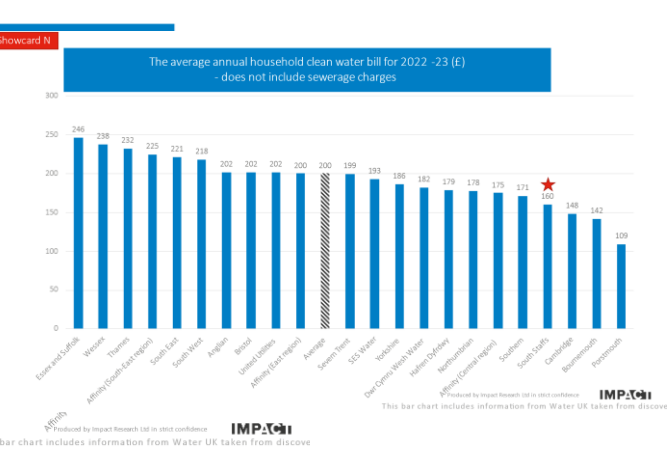
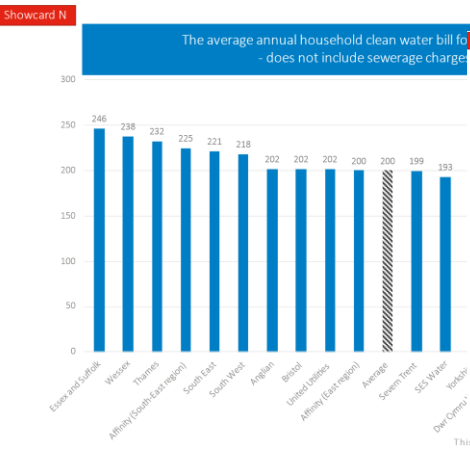


New page
HH ONLY Show
or

showcard N for HH ONLY, with either South Staffs Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more **here**.

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

New page

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

1. Yes – in all places
2. Yes – but some information could have been clearer
3. No – not clear at all
4. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

New page

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current average annual household bill for clean water is £160 a year (£13.33 month). This average bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know

New page

Info – show all

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

New page

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

1. Yes, I fully understand
2. I understand to an extent
3. No, not at all
4. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

1. Very acceptable
2. Acceptable
3. Neither acceptable nor unacceptable
4. Unacceptable
5. Very unacceptable
6. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

**REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL EITHER:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO 'unacceptable' (CODE 3 OR 4 OR 5)**

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO 'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your water bill if **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) **expected** annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

1. Very easy
2. Fairly easy
3. Neither easy nor difficult

4. Fairly difficult
5. Very difficult
6. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

1. Shopping around more
2. Spending less on food shopping and essentials
3. Spending less on non-essentials
4. Cutting back on non-essential journeys in my vehicle
5. Eat out less
6. Using less fuel such as gas or electricity in my home
7. Using less water
8. Using my savings
9. Using credit more than usual, for example, credit cards, loans or overdrafts
10. Ask family and friends for financial support
11. Other (please specify)
12. None of the above
13. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option B: You are no longer served by South Staffs Water (**if SSW**) or Cambridge Water (**if CAM**), but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

1. Option A: Continue to be served by <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>
2. Option B: Your water company merges with another, and you are served by a much larger water company
3. Not sure ANCHOR

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you (if domestic) your organisation (if NHH). This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you <PIPE IN live if QUIDSAMPLE = DOMESTIC OR work IF QHIDSAMPLE = NHH>?

Please select one option from the following:

1. City center location
2. Other urban location – e.g. suburbs
3. Semi-rural
4. Rural
5. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

- 1) Indian
- 2) Pakistani
- 3) Bangladeshi
- 4) Chinese
- 5) Any other Asian Background

Black, Black British, Caribbean or African

- 6) Caribbean
- 7) African
- 8) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

- 9) White and Black Caribbean
- 10) White and Black African
- 11) White and Asian
- 12) Any other Mixed or multiple ethnic backgrounds

White

- 13) English, Welsh, Scottish, Northern Irish or British
- 14) Irish
- 15) Gypsy or Irish Traveller
- 16) Roma
- 17) Any other White background

Other ethnic group

- 18) Arab
- 19) Any other ethnic group

20) Prefer not to say

S ASK ALL

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

1. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** never struggle to pay my/our utility bills
2. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
3. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** struggle to pay my utility bills and I/we am often behind in my payments
4. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** always struggle to pay my utility bills and I/we am nearly always behind in my payments
5. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** would rather not say

S ASK DOMESTIC

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

1. Up to £365
2. £365-£442
3. £443-£721

4. £722-£1000
5. £1001+

Per Year

6. Under £19,000
7. £19,000 - £23,000
8. £23,001 - £37,500
9. £37,501 - £52,000
10. £52,001+
11. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?
The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 1) Yes
- 2) No
- 3) Prefer not to say
- 4) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support. Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
1. Chronic/serious illness	
2. Medically Dependent Equipment – e.g. dialysis	
3. Oxygen use	
4. Poor sense of smell	
5. Physical Impairment	
6. Unable to answer door	
7. Aged 80 or above	
8. Young children aged 5 or under	
9. Visual impairment – e.g. partially sighted / blind	
10. Partially sighted	
11. Hearing / speech difficulties (including deafness)	
12. English is second language	
13. Limited literacy or numeracy	
14. Living with Dementia	
15. Developmental condition	
16. Mental Health	

17. Low or/and unstable income that makes budgeting finances hard	
18. Temporary - life change for example post hospital recovery, unemployment, infant in the house	
19. None of the above EXCLUSIVE ANCHOR	
20. Prefer not to say EXCLUSIVE ANCHOR	

QHIDVULNERABLE:

- 1 **VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 2 **NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you’re feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 1. Happy
- 2. Depressed
- 3. Stressed
- 4. Optimistic
- 5. Positive
- 6. Worried
- 7. Energetic
- 8. Tired
- 97. Other (please specify) **ANCHOR**
- 98. Prefer not to say **ANCHOR, EXCLUSIVE**
- 99. Don't know **ANCHOR, EXCLUSIVE**

G ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

1. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
2. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
3. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
4. Other
5. Not sure

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

S ASK ALL

D14 Thank you for taking the time to give your feedback. Please select how you would like to receive your £5 thank you. Please note if you select a Love2Shop gift voucher, you will need to supply your email address, so it can be sent to you.

1. Love2Shop gift voucher – accepted at over 20,000 retailer outlets
2. Donation to Water Aid – a charity who works globally to ensure more people have access to clean water every day
3. Donation to The Trussell Trust – who run a nationwide network of food banks

O ASK ALL

D14a Please provide your email address so the voucher can be emailed to you.

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

CAM Online panel

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of Cambridge Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 6) Journalism **CLOSE**
- 7) Water Supply or Wastewater services **CLOSE**
- 8) Market Research **CLOSE**
- 9) Academia **CLOSE**
- 10) None of the above **ANCHOR, EXCLUSIVE**

S ASK ALL

S2 Have you taken part in any research study for Cambridge Water in the last 6 months?

1. Yes **THANK & CLOSE**
2. No

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

- 3) Yes =Qualify for **NHH**
- 4) No - **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

- 3) I solely or jointly manage the water bills
- 4) I don't have any involvement in the water bills **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

4. Home/residential premises **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
5. Separate business premises
6. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

4. Paid directly
5. Included in rent **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
6. **Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR**

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

5. Public sector (e.g., local government, civil service, the NHS, higher education)
6. Private sector (e.g., manufacturing, financial services, hospitality, retail)
7. Charity sector
8. Other **ANCHOR**

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing
- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home [**DOMESTIC**] /workplace [**NHH**]?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**
- **HH F2F**
- **NHH RECRUIT TO ONLINE**

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

8. Sole trader
9. 2-9
10. 10-19
11. 20-49
12. 50-99
13. 100-249
14. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

5. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
6. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
7. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
8. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

- 13. B **CLASSIFY AS SSW**
- 14. DE **CLASSIFY AS SSW**
- 15. DY **CLASSIFY AS SSW**
- 16. ST **CLASSIFY AS SSW**
- 17. WS **CLASSIFY AS SSW**
- 18. WV **CLASSIFY AS SSW**
- 19. CV **CLASSIFY AS SSW**
- 20. CB **CLASSIFY AS CAM**
- 21. PE **CLASSIFY AS CAM**
- 22. SG **CLASSIFY AS CAM**

- 23. Prefer not to answer **THANK & CLOSE**
- 24. None of the above area codes **THANK & CLOSE**

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <**PIPE IN** South Staffs Water if **S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13)** or Cambridge Water if **S13 = CB, PE or SG (8-10 at S13)**>, is this correct?

- 4. Yes
- 5. No **THANK AND CLOSE**
- 6. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 11) Under 18 years old **CLOSE**
- 12) 18 to 24
- 13) 25 to 29
- 14) 30 to 34

- 15) 35 to 44
- 16) 45 to 54
- 17) 55 to 59
- 18) 60 to 74
- 19) 75 or over
- 20) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

- 7. I have complete responsibility for payment
- 8. I have shared responsibility for payment with others in my household
- 9. I have no responsibility, but I know it is paid by my landlord and included in my rent
- 10. I have no responsibility for payment and I don't know who pays the bills
- 11. Other
- 12. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 5) Male
- 6) Female
- 7) Non-binary or other
- 8) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief 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.

- 13) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 14) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 15) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 16) 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.)
- 17) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 18) Student
- 19) Casual worker – not in permanent employment

- 20) Housewife/ Homemaker
- 21) Retired and living on state pension
- 22) Retired and not living on state pension
- 23) Unemployed or not working due to long-term sickness
- 24) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

- 8. Yes – I/we asked to have one installed
- 9. Yes – it was already in the property when I/we moved in
- 10. Yes – I/we had to have it fitted, but I/we didn't really want it installed
- 11. No – and I/we not interested in getting one
- 12. No – but I/we are considering getting one
- 13. No – I/we had one, but decided to opt out
- 14. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water bill.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a

low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - CALCULATE ANNUAL COST (x52) – THIS is (£A)

£NUMERIC RESPONSE per Month - CALCULATE ANNUAL COST (x12) – THIS is (£A)

£NUMERIC RESPONSE per Quarter - CALCULATE ANNUAL COST (x4) – THIS is (£A)

£NUMERIC RESPONSE every 6 months - CALCULATE ANNUAL COST (x2) – THIS is (£A)

£NUMERIC RESPONSE per Year - TAKE THIS AS THE ANNUAL COST – THIS is (£A)

R99. Don't know *EXCLUSIVE*

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month

£29 - £32 per month

£33 - £37 per month

£38 - £41 per month

£42 - £45 per month

£46 - £50 per month

£51 - £54 per month

£55 - £59 per month

£60 - £64 per month

£65 - £69 per month

£70 - £75 per month

£76 - £83 per month

£84+ per month

Annual

Less than £150 per year

£151 - £200 per year

£201 - £250 per year

£251 - £300 per year

£301 - £350 per year

£351 - £400 per year

- £401 - £450 per year
- £451 - £500 per year
- £501 - £550 per year
- £551 - £600 per year
- £601 - £650 per year
- £651 - £700 per year
- £701 - £750 per year
- £751 - £800 per year
- £801 - £900 per year
- £901 - £1,000 per year
- £1,001+ per year
- 98. Don't know
- 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	00
13 - £16 per month	51 - £200 per year	75
17 - £20 per month	01 - £250 per year	25
21 - £24 per month	51 - £300 per year	75
25 - £28 per month	01 - £350 per year	25
29 - £32 per month	51 - £400 per year	75
33 - £37 per month	01 - £450 per year	25
38 - £41 per month	51 - £500 per year	75
42 - £45 per month	01 - £550 per year	25
46 - £50 per month	51 - £600 per year	75
51 - £54 per month	01 - £650 per year	25

5 - £59 per month	51 - £700 per year	75
0 - £64 per month	01 - £750 per year	25
5 - £69 per month	51 - £800 per year	75
0 - £75 per month	01 - £900 per year	50
6 - £83 per month	01 - £1,000 per year	50
4+ per month	,001+ per year	,050
Don't know		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)
Prefer not to say		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from (**TEXT SUB FROM QUIDAREA: Cambridge Water / South Staffs Water**).

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM

Compared with other customers, that's quite a high bill.

If this doesn't look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3)

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141**) per year.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF UNMETERED OR DON'T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170**) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:

For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation's water bill.

S ASK NHHs. Show image 'how the water retail market works'

Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

- 4) One bill covering both clean water and waste water services
- 5) A separate bill for clean water and a separate bill for waste water
- 6) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

Less than £13 per month (Less than £150 per year) – MIDPOINT £100

£13 - £16 per month (£151 - £200 per year) – MIDPOINT £175

£17 - £23 per month (£201 - £300 per year) – MIDPOINT £250

£24 - £40 per month (£301 - £500 per year) – MIDPOINT £400

£41 - £64 per month (£501 - £750 per year) – MIDPOINT £625

£65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875

£84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500

£167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000

£334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000

£501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000

£834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
 £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
 £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
 £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
 £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
 £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
 £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
 Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>
200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water).**

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on its total water bill. This means your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW – PN: Calculate**)) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(**EA**) per year on its total water bill. This means that your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately £(**EA = MIDPOINT VALUE FROM Q1b x0.37 CAM OR x0.46 SSW**) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £(EA = MIDPOINT VALUE FROM Q1b) Thanks for confirming, we estimate that your organisation spends approximately **Q1b** per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use £**[TEXT SUB FROM C1c]** per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your current clean water bill?

7. Very easy
8. Fairly easy
9. Neither easy nor difficult
10. Fairly difficult
11. Very difficult
12. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**. The following questions will relate to the provision of clean water to your home (if domestic) or place or work (NHH). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if South Staffs) / Anglian Water (if CAM).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied										Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98	

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money					Very good value for money	Don't know
1	2	3	4	5	98	

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 15) Had to raise a query about your water bill
- 16) Had to raise a query about a water meter or installing a meter
- 17) Needed to raise a customer service complaint, or one about your water supply
- 18) Discolouration of water coming out of your tap
- 19) A change to the taste and/or smell of your tap water
- 20) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 21) A temporary loss of water supply - for more than one hour
- 22) A leak in the underground pipe that supplies water to your property from the mains pipe
- 23) Low water pressure
- 24) Flooding from a burst pipe
- 25) A hose pipe ban
- 26) Traffic disruption caused by water works
- 27) Other (please specify) **ANCHOR**
- 28) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

**NEW PAGE
SHOW ALL**

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- **SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)**

About South Staffs Water



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



- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge

About Cambridge Water



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



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall

To give you an idea of their size you'll see below some facts and figures about Cambridge Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 8 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 4.3 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 1.36 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 0.35 million clean water consumers

Employees:

- Thames Water: 7,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 7,000
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 5,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 339
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 110

MC ASK ALL (MUST SELECT 1, MAX SELECT 3)

Q5a What advantages, if any, do you think there are for customers supplied by a smaller water company? Please select up to three.

RANDOMIZE

20. I don't think there are any advantages of being served by a small water company **[ANCHOR and EXCLUSIVE]**
21. Better knowledge of the local area
22. Closer to the communities it serves
23. Employ local people
24. Ability to innovate and come up with new ideas
25. Lower bills
26. More accountable to customers
27. More flexible, adaptable and agile
28. More responsive to customer needs
29. More honest
30. More trustworthy
31. Personal service
32. Quicker to develop new ideas / ways of doing things
33. Quicker response times to issues
34. Greater access to funds/money markets to make investments
35. Less likely to be taken over by another company
36. More resilient in a crisis
37. Other – please write in as much detail as possible: **[ANCHOR]**
38. Other – please write in as much detail as possible: **[ANCHOR]**

S ASK ALL

Q6 If you had the choice, what size of water company would you like (enter 'your organisation' if NHH) to be served by? Please pick a number on a scale of 0 to 10, where 0 represents a small water company, and 10 represents a large water company.

Small										Large
0	1	2	3	4	5	6	7	8	9	10

MC ASK ALL

Q7 Like most water companies, <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>.

SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D

Cambridge Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Community Vehicle
Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.

Additional support for those who need extra help
The company supports over 9,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Showcard D

South Staffs Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Actively supporting local communities
South Staffs' outreach team outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub (W/Wednesday) for people to drop in to speak with the team.

Additional support for those who need extra help
The company supports over 8,700 households on low incomes by offering discounted water bills through their Assure tariff and over 5,600 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Which of these were you aware of before you took part in this study?

10. Education outreach
11. Employee volunteering
12. WaterAid
13. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
14. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
15. Additional support for those who need extra help
16. PEBBLE biodiversity fund
17. SPRING Environmental Protection Scheme
18. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water's Performance

Show all

Over the next few screens we'll show you some charts that highlight how <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we'll show you three as examples.

South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

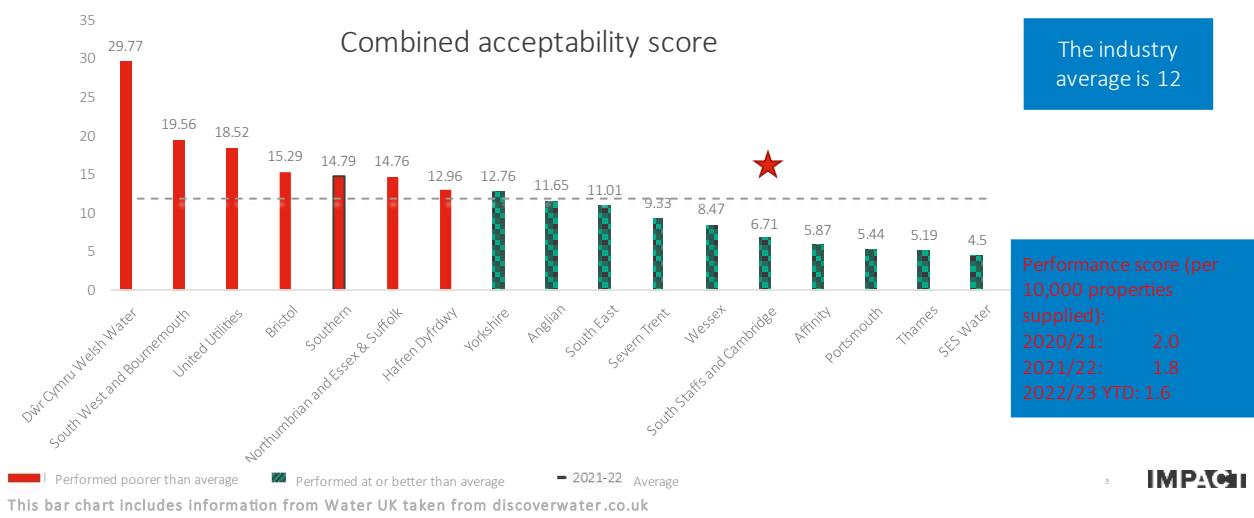
Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company’s water is.

Water companies measure the acceptability of their water overall – this is done by calculating a single measure that includes taste, water and colour of the water. The lower the score, the more acceptable the water

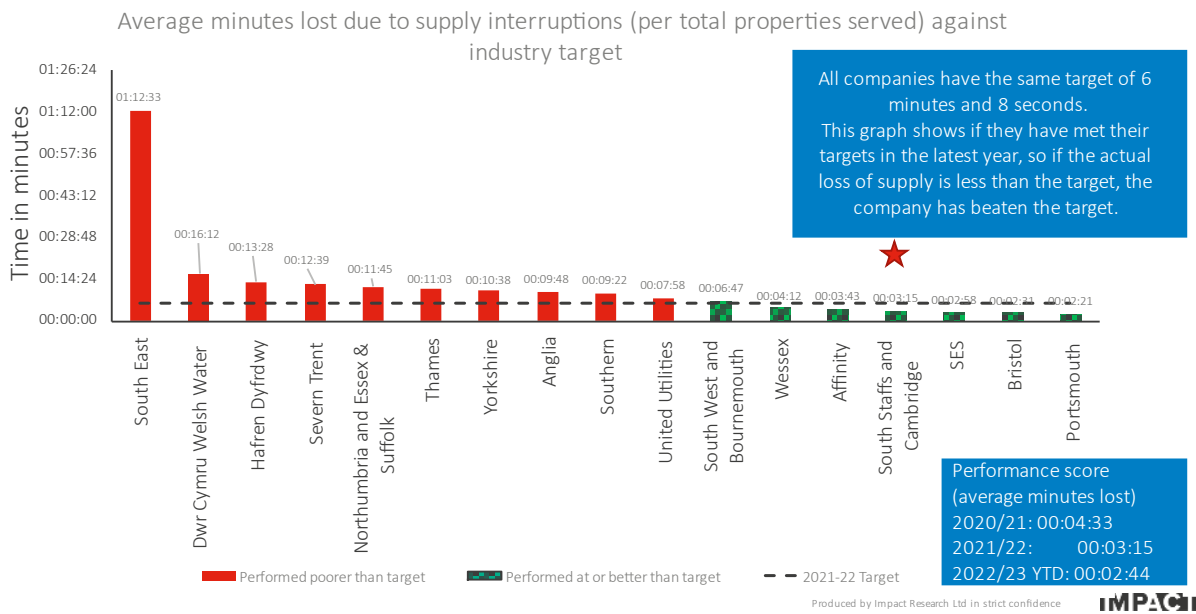


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

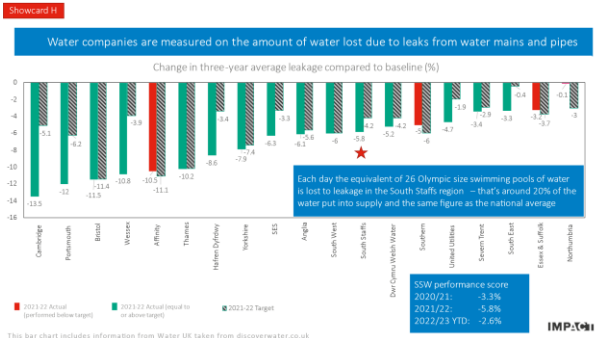
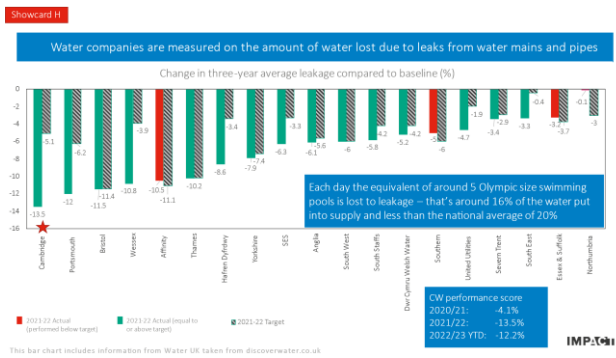
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

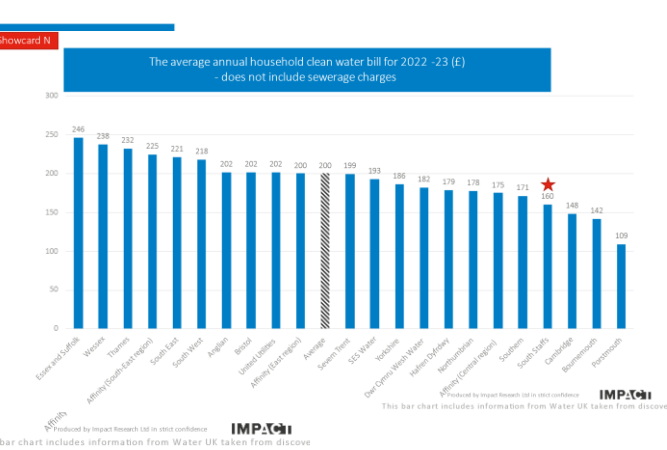
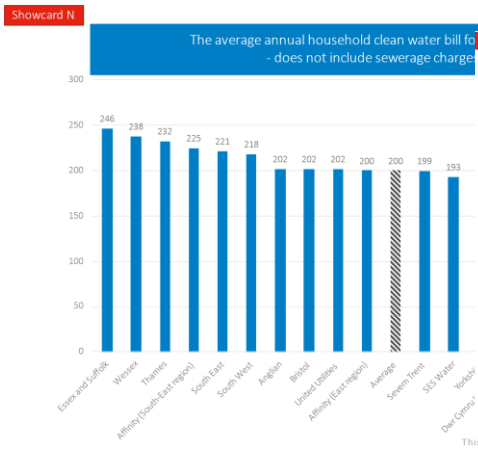


New page
HH
ONLY
Show
or

showcard N for HH ONLY, with either South Staffs Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more [here](#).

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

New page

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

5. Yes – in all places
6. Yes – but some information could have been clearer
7. No – not clear at all
8. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

New page

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current **average** annual household bill for clean water is £160 a year (£13.33 month). This **average** bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

13. Very easy
14. Fairly easy
15. Neither easy nor difficult
16. Fairly difficult
17. Very difficult
18. Don't know

[New page](#)

[Info – show all](#)

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

[New page](#)

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

5. Yes, I fully understand
6. I understand to an extent
7. No, not at all
8. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

7. Very acceptable
8. Acceptable
9. Neither acceptable nor unacceptable
10. Unacceptable
11. Very unacceptable
12. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL *EITHER*:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO
'unacceptable' (CODE 3 OR 4 OR 5)

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO
'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your <PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH> to afford your water bill if <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) **expected** annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

- 19. Very easy
- 20. Fairly easy
- 21. Neither easy nor difficult
- 22. Fairly difficult
- 23. Very difficult
- 24. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

- 14. Shopping around more
- 15. Spending less on food shopping and essentials
- 16. Spending less on non-essentials
- 17. Cutting back on non-essential journeys in my vehicle
- 18. Eat out less
- 19. Using less fuel such as gas or electricity in my home
- 20. Using less water
- 21. Using my savings
- 22. Using credit more than usual, for example, credit cards, loans or overdrafts
- 23. Ask family and friends for financial support
- 24. Other (please specify)
- 25. None of the above
- 26. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.

- Option B: You are no longer served by South Staffs Water (if SSW) or Cambridge Water (if CAM), but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

4. Option A: Continue to be served by <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>
5. Option B: Your water company merges with another, and you are served by a much larger water company
6. Not sure ANCHOR

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you (if domestic) your organisation (if NHH). This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you <PIPE IN live if QUIDSAMPLE = DOMESTIC OR work IF QHIDSAMPLE = NHH>?

Please select one option from the following:

6. City center location
7. Other urban location – e.g. suburbs
8. Semi-rural
9. Rural
10. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

- 21) Indian
- 22) Pakistani
- 23) Bangladeshi
- 24) Chinese
- 25) Any other Asian Background

Black, Black British, Caribbean or African

- 26) Caribbean
- 27) African
- 28) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

- 29) White and Black Caribbean
- 30) White and Black African
- 31) White and Asian
- 32) Any other Mixed or multiple ethnic backgrounds

White

- 33) English, Welsh, Scottish, Northern Irish or British
- 34) Irish
- 35) Gypsy or Irish Traveller
- 36) Roma
- 37) Any other White background

Other ethnic group

- 38) Arab
- 39) Any other ethnic group

40) Prefer not to say

S ASK ALL

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

- 6. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> never struggle to pay my/our utility bills
- 7. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
- 8. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> struggle to pay my utility bills and I/we am often behind in my payments
- 9. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> always struggle to pay my utility bills and I/we am nearly always behind in my payments
- 10. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> would rather not say

S ASK DOMESTIC

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

- 12. Up to £365
- 13. £365-£442
- 14. £443-£721
- 15. £722-£1000
- 16. £1001+

Per Year

- 17. Under £19,000
- 18. £19,000 - £23,000
- 19. £23,001 - £37,500
- 20. £37,501 - £52,000
- 21. £52,001+
- 22. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?
The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 5) Yes
- 6) No
- 7) Prefer not to say
- 8) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support. Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
21. Chronic/serious illness	
22. Medically Dependent Equipment – e.g. dialysis	
23. Oxygen use	
24. Poor sense of smell	
25. Physical Impairment	
26. Unable to answer door	
27. Aged 80 or above	
28. Young children aged 5 or under	
29. Visual impairment – e.g. partially sighted / blind	
30. Partially sighted	
31. Hearing / speech difficulties (including deafness)	

32. English is second language	
33. Limited literacy or numeracy	
34. Living with Dementia	
35. Developmental condition	
36. Mental Health	
37. Low or/and unstable income that makes budgeting finances hard	
38. Temporary - life change for example post hospital recovery, unemployment, infant in the house	
39. None of the above EXCLUSIVE ANCHOR	
40. Prefer not to say EXCLUSIVE ANCHOR	

QHIDVULNERABLE:

- 3 VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 4 NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you’re feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 9. Happy
- 10. Depressed
- 11. Stressed
- 12. Optimistic
- 13. Positive
- 14. Worried
- 15. Energetic
- 16. Tired
- 100. Other (please specify) **ANCHOR**
- 101. Prefer not to say **ANCHOR, EXCLUSIVE**
- 102. Don't know **ANCHOR, EXCLUSIVE**

G

ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

6. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
7. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
8. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
9. Other
10. Not sure

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

CAM SSC sample

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of Cambridge Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 11) Journalism **CLOSE**
- 12) Water Supply or Wastewater services **CLOSE**
- 13) Market Research **CLOSE**
- 14) Academia **CLOSE**
- 15) None of the above **ANCHOR, EXCLUSIVE**

S ASK ALL

S2 Have you taken part in any research study for Cambridge Water in the last 6 months?

1. Yes **THANK & CLOSE**
2. No

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

- 5) Yes =Qualify for **NHH**
- 6) No - **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

- 5) I solely or jointly manage the water bills
- 6) I don't have any involvement in the water bills **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

7. Home/residential premises **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
8. Separate business premises
9. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

7. Paid directly
8. Included in rent **QHIDSAMPLE=DOMESTIC, SKIP TO S4**
9. **Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR**

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

9. Public sector (e.g., local government, civil service, the NHS, higher education)
10. Private sector (e.g., manufacturing, financial services, hospitality, retail)
11. Charity sector
12. Other **ANCHOR**

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing
- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home [**DOMESTIC**] /workplace [**NHH**]?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**
- **HH F2F**
- **NHH RECRUIT TO ONLINE**

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

15. Sole trader
16. 2-9
17. 10-19
18. 20-49
19. 50-99
20. 100-249
21. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

9. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
10. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
11. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
12. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

- 25. B **CLASSIFY AS SSW**
- 26. DE **CLASSIFY AS SSW**
- 27. DY **CLASSIFY AS SSW**
- 28. ST **CLASSIFY AS SSW**
- 29. WS **CLASSIFY AS SSW**
- 30. WV **CLASSIFY AS SSW**
- 31. CV **CLASSIFY AS SSW**
- 32. CB **CLASSIFY AS CAM**
- 33. PE **CLASSIFY AS CAM**
- 34. SG **CLASSIFY AS CAM**

- 35. Prefer not to answer **THANK & CLOSE**
- 36. None of the above area codes **THANK & CLOSE**

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <**PIPE IN** South Staffs Water if **S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13)** or Cambridge Water if **S13 = CB, PE or SG (8-10 at S13)**>, is this correct?

- 7. Yes
- 8. No **THANK AND CLOSE**
- 9. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 21) Under 18 years old **CLOSE**
- 22) 18 to 24
- 23) 25 to 29
- 24) 30 to 34

- 25) 35 to 44
- 26) 45 to 54
- 27) 55 to 59
- 28) 60 to 74
- 29) 75 or over
- 30) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

- 13. I have complete responsibility for payment
- 14. I have shared responsibility for payment with others in my household
- 15. I have no responsibility, but I know it is paid by my landlord and included in my rent
- 16. I have no responsibility for payment and I don't know who pays the bills
- 17. Other
- 18. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 9) Male
- 10) Female
- 11) Non-binary or other
- 12) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief 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.

- 25) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 26) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 27) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 28) 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.)
- 29) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 30) Student
- 31) Casual worker – not in permanent employment

- 32) Housewife/ Homemaker
- 33) Retired and living on state pension
- 34) Retired and not living on state pension
- 35) Unemployed or not working due to long-term sickness
- 36) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

- 15. Yes – I/we asked to have one installed
- 16. Yes – it was already in the property when I/we moved in
- 17. Yes – I/we had to have it fitted, but I/we didn't really want it installed
- 18. No – and I/we not interested in getting one
- 19. No – but I/we are considering getting one
- 20. No – I/we had one, but decided to opt out
- 21. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water bill.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a

low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - CALCULATE ANNUAL COST (x52) – THIS is (£A)

£NUMERIC RESPONSE per Month - CALCULATE ANNUAL COST (x12) – THIS is (£A)

£NUMERIC RESPONSE per Quarter - CALCULATE ANNUAL COST (x4) – THIS is (£A)

£NUMERIC RESPONSE every 6 months - CALCULATE ANNUAL COST (x2) – THIS is (£A)

£NUMERIC RESPONSE per Year - TAKE THIS AS THE ANNUAL COST – THIS is (£A)

R99. Don't know *EXCLUSIVE*

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month

£29 - £32 per month

£33 - £37 per month

£38 - £41 per month

£42 - £45 per month

£46 - £50 per month

£51 - £54 per month

£55 - £59 per month

£60 - £64 per month

£65 - £69 per month

£70 - £75 per month

£76 - £83 per month

£84+ per month

Annual

Less than £150 per year

£151 - £200 per year

£201 - £250 per year

£251 - £300 per year

£301 - £350 per year

£351 - £400 per year

- £401 - £450 per year
- £451 - £500 per year
- £501 - £550 per year
- £551 - £600 per year
- £601 - £650 per year
- £651 - £700 per year
- £701 - £750 per year
- £751 - £800 per year
- £801 - £900 per year
- £901 - £1,000 per year
- £1,001+ per year
- 98. Don't know
- 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	00
13 - £16 per month	51 - £200 per year	75
17 - £20 per month	01 - £250 per year	25
21 - £24 per month	51 - £300 per year	75
25 - £28 per month	01 - £350 per year	25
29 - £32 per month	51 - £400 per year	75
33 - £37 per month	01 - £450 per year	25
38 - £41 per month	51 - £500 per year	75
42 - £45 per month	01 - £550 per year	25
46 - £50 per month	51 - £600 per year	75
51 - £54 per month	01 - £650 per year	25

5 - £59 per month	51 - £700 per year	75
0 - £64 per month	01 - £750 per year	25
5 - £69 per month	51 - £800 per year	75
0 - £75 per month	01 - £900 per year	50
6 - £83 per month	01 - £1,000 per year	50
4+ per month	,001+ per year	,050
Don't know		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)
Prefer not to say		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from (**TEXT SUB FROM QUIDAREA: Cambridge Water / South Staffs Water**).

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM
Compared with other customers, that’s quite a high bill.

If this doesn’t look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF ‘Don’t know’ AT B1 AND ‘Don’t know’ OR ‘Prefer not to say’ AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3)

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141**) per year.

IF ‘Don’t know’ AT B1 AND ‘Don’t know’ OR ‘Prefer not to say’ AT B1a - SHOW IF UNMETERED OR DON’T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170**) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:
For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation’s water bill.

S ASK NHHs. Show image ‘how the water retail market works’

Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

- 7) One bill covering both clean water and waste water services
- 8) A separate bill for clean water and a separate bill for waste water
- 9) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

Less than £13 per month (Less than £150 per year) – MIDPOINT £100

£13 - £16 per month (£151 - £200 per year) – MIDPOINT £175

£17 - £23 per month (£201 - £300 per year) – MIDPOINT £250

£24 - £40 per month (£301 - £500 per year) – MIDPOINT £400

£41 - £64 per month (£501 - £750 per year) – MIDPOINT £625

£65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875

£84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500

£167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000

£334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000

£501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000

£834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
 £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
 £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
 £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
 £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
 £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
 £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
 Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>
200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water).**

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on its total water bill. This means your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW – PN: Calculate**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(**EA**) per year on its total water bill. This means that your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately £(**EA = MIDPOINT VALUE FROM Q1b x0.37 CAM OR x0.46 SSW**) per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £(EA = MIDPOINT VALUE FROM Q1b) Thanks for confirming, we estimate that your organisation spends approximately **Q1b** per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use £**[TEXT SUB FROM C1c]** per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your current clean water bill?

- 25. Very easy
- 26. Fairly easy
- 27. Neither easy nor difficult
- 28. Fairly difficult
- 29. Very difficult
- 30. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**. The following questions will relate to the provision of clean water to your home (if domestic) or place or work (NHH). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if South Staffs) / Anglian Water (if CAM).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied										Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98	

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money					Very good value for money	Don't know
1	2	3	4	5	98	

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 29) Had to raise a query about your water bill
- 30) Had to raise a query about a water meter or installing a meter
- 31) Needed to raise a customer service complaint, or one about your water supply
- 32) Discolouration of water coming out of your tap
- 33) A change to the taste and/or smell of your tap water
- 34) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 35) A temporary loss of water supply - for more than one hour
- 36) A leak in the underground pipe that supplies water to your property from the mains pipe
- 37) Low water pressure
- 38) Flooding from a burst pipe
- 39) A hose pipe ban
- 40) Traffic disruption caused by water works
- 41) Other (please specify) **ANCHOR**
- 42) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

**NEW PAGE
SHOW ALL**

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- **SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)**

About South Staffs Water



- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge



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

About Cambridge Water



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall



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

To give you an idea of their size you'll see below some facts and figures about Cambridge Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 8 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 4.3 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 1.36 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 0.35 million clean water consumers

Employees:

- Thames Water: 7,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 7,000
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 5,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 339
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 110

MC ASK ALL (MUST SELECT 1, MAX SELECT 3)

Q5a What advantages, if any, do you think there are for customers supplied by a smaller water company? Please select up to three.

RANDOMIZE

39. I don't think there are any advantages of being served by a small water company **[ANCHOR and EXCLUSIVE]**
40. Better knowledge of the local area
41. Closer to the communities it serves
42. Employ local people
43. Ability to innovate and come up with new ideas
44. Lower bills
45. More accountable to customers
46. More flexible, adaptable and agile
47. More responsive to customer needs
48. More honest
49. More trustworthy
50. Personal service
51. Quicker to develop new ideas / ways of doing things
52. Quicker response times to issues
53. Greater access to funds/money markets to make investments
54. Less likely to be taken over by another company
55. More resilient in a crisis
56. Other – please write in as much detail as possible: **[ANCHOR]**
57. Other – please write in as much detail as possible: **[ANCHOR]**

S ASK ALL

Q6 If you had the choice, what size of water company would you like (enter 'your organisation' if NHH) to be served by? Please pick a number on a scale of 0 to 10, where 0 represents a small water company, and 10 represents a large water company.

Small										Large
0	1	2	3	4	5	6	7	8	9	10

MC ASK ALL

Q7 Like most water companies, <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**>.

SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D

Cambridge Water Community and Environmental Initiatives

Showcard D

South Staffs Water Community and Environmental Initiatives

Which of these were you aware of before you took part in this study?

- 19. Education outreach
- 20. Employee volunteering
- 21. WaterAid
- 22. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
- 23. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
- 24. Additional support for those who need extra help
- 25. PEBBLE biodiversity fund
- 26. SPRING Environmental Protection Scheme
- 27. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water’s Performance

Show all

Over the next few screens we’ll show you some charts that highlight how <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we’ll show you three as examples.

South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

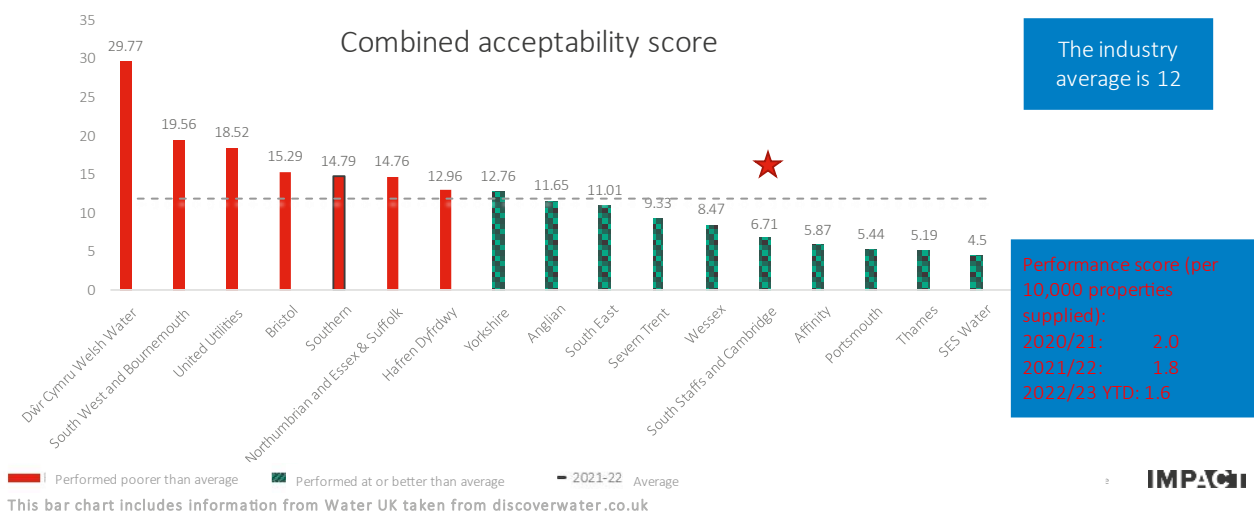
Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company's water is.

Water companies measure the acceptability of their water overall - this is done by calculating a single measure that includes taste, water and colour of the water. The lower the score, the more acceptable the water

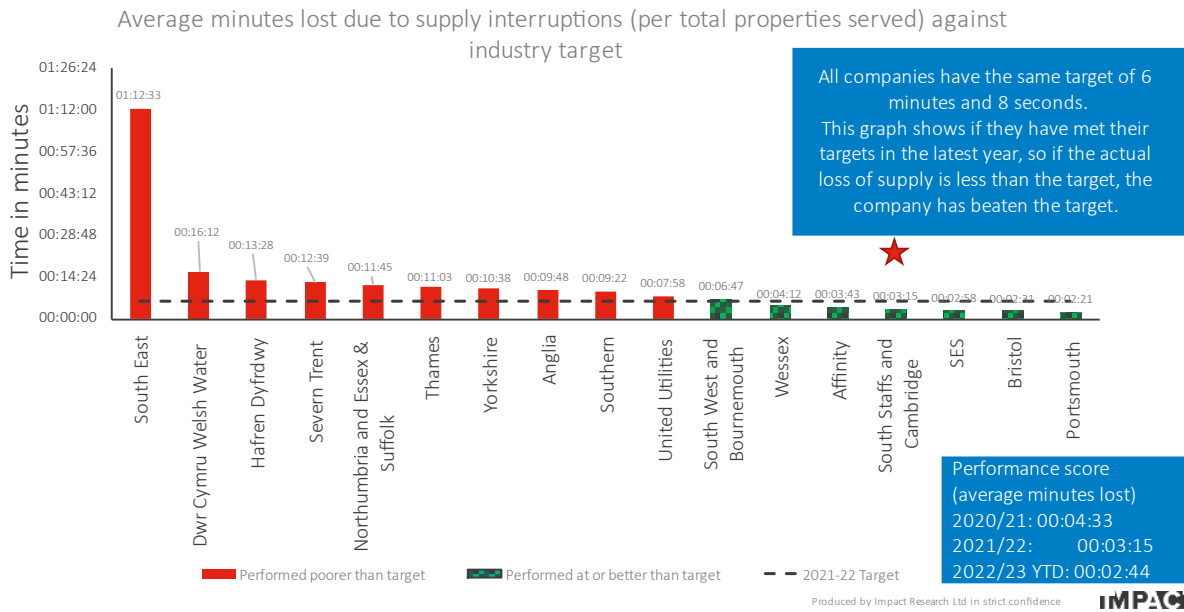


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

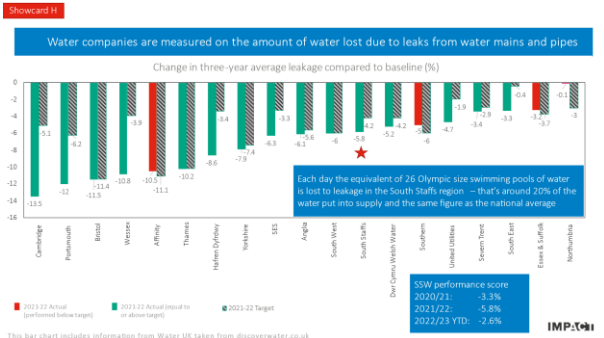
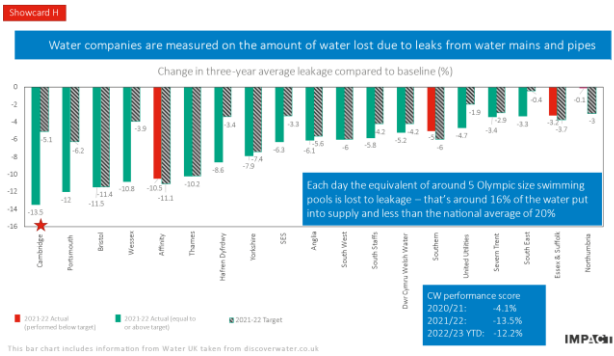
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

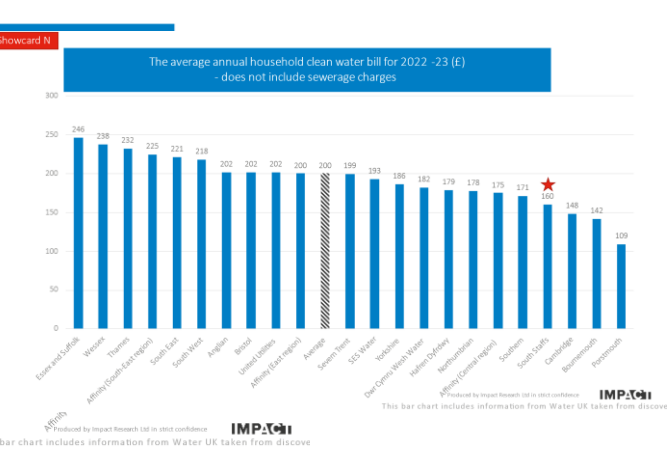
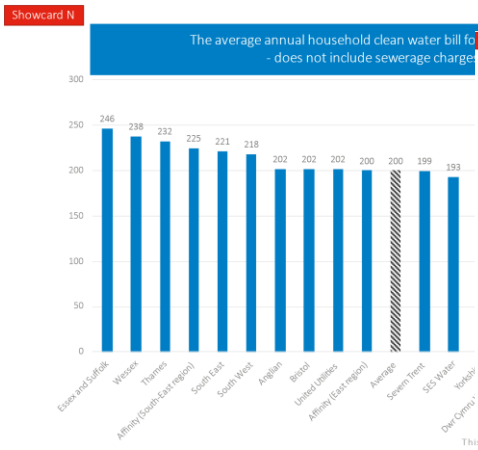


New page
HH ONLY Show
or

showcard N for HH ONLY, with either South Staffs Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more [here](#).

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

[New page](#)

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

9. Yes – in all places
10. Yes – but some information could have been clearer
11. No – not clear at all
12. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

[New page](#)

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current average annual household bill for clean water is £160 a year (£13.33 month). This average bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

31. Very easy
32. Fairly easy
33. Neither easy nor difficult
34. Fairly difficult
35. Very difficult
36. Don't know

[New page](#)

[Info – show all](#)

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

[New page](#)

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

9. Yes, I fully understand
10. I understand to an extent
11. No, not at all
12. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

- 13. Very acceptable
- 14. Acceptable
- 15. Neither acceptable nor unacceptable
- 16. Unacceptable
- 17. Very unacceptable
- 18. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL *EITHER*:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO
'unacceptable' (CODE 3 OR 4 OR 5)

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO
'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your <PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH> to afford your water bill if <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) expected annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

- 37. Very easy
- 38. Fairly easy
- 39. Neither easy nor difficult
- 40. Fairly difficult
- 41. Very difficult
- 42. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

- 27. Shopping around more
- 28. Spending less on food shopping and essentials
- 29. Spending less on non-essentials
- 30. Cutting back on non-essential journeys in my vehicle
- 31. Eat out less
- 32. Using less fuel such as gas or electricity in my home
- 33. Using less water
- 34. Using my savings
- 35. Using credit more than usual, for example, credit cards, loans or overdrafts
- 36. Ask family and friends for financial support
- 37. Other (please specify)
- 38. None of the above
- 39. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.

- Option B: You are no longer served by South Staffs Water (if SSW) or Cambridge Water (if CAM), but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

7. Option A: Continue to be served by <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>
8. Option B: Your water company merges with another, and you are served by a much larger water company
9. Not sure ANCHOR

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you (if domestic) your organisation (if NHH). This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you <PIPE IN live if QUIDSAMPLE = DOMESTIC OR work IF QHIDSAMPLE = NHH>?

Please select one option from the following:

11. City center location
12. Other urban location – e.g. suburbs
13. Semi-rural
14. Rural
15. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

- 41) Indian
- 42) Pakistani
- 43) Bangladeshi
- 44) Chinese
- 45) Any other Asian Background

Black, Black British, Caribbean or African

- 46) Caribbean
- 47) African
- 48) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

- 49) White and Black Caribbean
- 50) White and Black African
- 51) White and Asian
- 52) Any other Mixed or multiple ethnic backgrounds

White

- 53) English, Welsh, Scottish, Northern Irish or British
- 54) Irish
- 55) Gypsy or Irish Traveller
- 56) Roma
- 57) Any other White background

Other ethnic group

- 58) Arab
- 59) Any other ethnic group

60) Prefer not to say

S ASK ALL

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

11. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> never struggle to pay my/our utility bills
12. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
13. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> struggle to pay my utility bills and I/we am often behind in my payments
14. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> always struggle to pay my utility bills and I/we am nearly always behind in my payments
15. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> would rather not say

S ASK DOMESTIC

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

- 23. Up to £365
- 24. £365-£442
- 25. £443-£721
- 26. £722-£1000
- 27. £1001+

Per Year

- 28. Under £19,000
- 29. £19,000 - £23,000
- 30. £23,001 - £37,500
- 31. £37,501 - £52,000
- 32. £52,001+
- 33. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?

The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 9) Yes
- 10) No
- 11) Prefer not to say
- 12) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support.

Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
41. Chronic/serious illness	
42. Medically Dependent Equipment – e.g. dialysis	
43. Oxygen use	
44. Poor sense of smell	
45. Physical Impairment	
46. Unable to answer door	
47. Aged 80 or above	
48. Young children aged 5 or under	
49. Visual impairment – e.g. partially sighted / blind	
50. Partially sighted	

51. Hearing / speech difficulties (including deafness)	
52. English is second language	
53. Limited literacy or numeracy	
54. Living with Dementia	
55. Developmental condition	
56. Mental Health	
57. Low or/and unstable income that makes budgeting finances hard	
58. Temporary - life change for example post hospital recovery, unemployment, infant in the house	
59. None of the above EXCLUSIVE ANCHOR	
60. Prefer not to say EXCLUSIVE ANCHOR	

QHIDVULNERABLE:

- 5 **VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 6 **NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 17. Happy
- 18. Depressed
- 19. Stressed
- 20. Optimistic
- 21. Positive
- 22. Worried
- 23. Energetic
- 24. Tired
- 103. Other (please specify) **ANCHOR**
- 104. Prefer not to say **ANCHOR, EXCLUSIVE**
- 105. Don't know **ANCHOR, EXCLUSIVE**

G

ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

11. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
12. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
13. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
14. Other
15. Not sure

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

S ASK IF SSC SAMPLE ONLY, NOT PANEL, DOMESTIC ONLY

D13. Would you like to join <PIPE IN South Staffs Water's if QHIDAREA= SSW or Cambridge Water's if QHIDAREA= CAM> online community, called H2Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service*

1. Yes
2. No

*By ticking 'Yes' you give permission for Impact, who are running this study, to share your e-mail address with <PIPE IN South Staffs Water's if QHIDAREA= SSW or Cambridge Water's if QHIDAREA= CAM> 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.

S ASK ALL

D14 Thank you for taking the time to give your feedback. Please select how you would like to receive your £5 thank you. Please note if you select a Love2Shop gift voucher, you will need to supply your email address, so it can be sent to you.

4. Love2Shop gift voucher – accepted at over 20,000 retailer outlets
5. Donation to Water Aid – a charity who works globally to ensure more people have access to clean water every day
6. Donation to The Trussell Trust – who run a nationwide network of food banks

O ASK ALL

D14a Please provide your email address so the voucher can be emailed to you.

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

SSW H2Online

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of South Staffs Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 16) Journalism **CLOSE**
- 17) Water Supply or Wastewater services **CLOSE**
- 18) Market Research **CLOSE**
- 19) Academia **CLOSE**
- 20) None of the above **ANCHOR, EXCLUSIVE**

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

- 7) Yes =Qualify for NHH
- 8) No - QHIDSAMPLE=DOMESTIC, SKIP TO S4

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

- 7) I solely or jointly manage the water bills
- 8) I don't have any involvement in the water bills QHIDSAMPLE=DOMESTIC, SKIP TO S4

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

- 10. Home/residential premises QHIDSAMPLE=DOMESTIC, SKIP TO S4
- 11. Separate business premises
- 12. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

- 10. Paid directly
- 11. Included in rent QHIDSAMPLE=DOMESTIC, SKIP TO S4
- 12. Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

- 13. Public sector (e.g., local government, civil service, the NHS, higher education)
- 14. Private sector (e.g., manufacturing, financial services, hospitality, retail)
- 15. Charity sector
- 16. Other ANCHOR

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing

- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home **[DOMESTIC]** /workplace **[NHH]**?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**

- **HH F2F**
- **NHH RECRUIT TO ONLINE**

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

- 22. Sole trader
- 23. 2-9
- 24. 10-19
- 25. 20-49
- 26. 50-99
- 27. 100-249
- 28. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

- 13. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
- 14. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
- 15. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
- 16. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

37. B **CLASSIFY AS SSW**

- 38. DE CLASSIFY AS SSW
- 39. DY CLASSIFY AS SSW
- 40. ST CLASSIFY AS SSW
- 41. WS CLASSIFY AS SSW
- 42. WV CLASSIFY AS SSW
- 43. CV CLASSIFY AS SSW
- 44. CB CLASSIFY AS CAM
- 45. PE CLASSIFY AS CAM
- 46. SG CLASSIFY AS CAM

- 47. Prefer not to answer **THANK & CLOSE**
- 48. None of the above area codes **THANK & CLOSE**

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <PIPE IN South Staffs Water if S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13) or Cambridge Water if S13 = CB, PE or SG (8-10 at S13)>, is this correct?

- 10. Yes
- 11. No **THANK AND CLOSE**
- 12. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 31) Under 18 years old **CLOSE**
- 32) 18 to 24
- 33) 25 to 29
- 34) 30 to 34
- 35) 35 to 44
- 36) 45 to 54
- 37) 55 to 59
- 38) 60 to 74
- 39) 75 or over

40) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

- 19. I have complete responsibility for payment
- 20. I have shared responsibility for payment with others in my household
- 21. I have no responsibility, but I know it is paid by my landlord and included in my rent
- 22. I have no responsibility for payment and I don't know who pays the bills
- 23. Other
- 24. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 13) Male
- 14) Female
- 15) Non-binary or other
- 16) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief 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.

- 37) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 38) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 39) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 40) 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.)
- 41) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 42) Student
- 43) Casual worker – not in permanent employment
- 44) Housewife/ Homemaker
- 45) Retired and living on state pension
- 46) Retired and not living on state pension
- 47) Unemployed or not working due to long-term sickness
- 48) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

- 22. Yes – I/we asked to have one installed
- 23. Yes – it was already in the property when I/we moved in
- 24. Yes – I/we had to have it fitted, but I/we didn't really want it installed
- 25. No – and I/we not interested in getting one
- 26. No – but I/we are considering getting one
- 27. No – I/we had one, but decided to opt out
- 28. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water bill.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - CALCULATE ANNUAL COST (x52) – THIS is (£A)

£NUMERIC RESPONSE per Month - CALCULATE ANNUAL COST (x12) – THIS is (£A)

£NUMERIC RESPONSE per Quarter - CALCULATE ANNUAL COST (x4) – THIS is (£A)

£NUMERIC RESPONSE every 6 months - CALCULATE ANNUAL COST (x2) – THIS is (£A)

£NUMERIC RESPONSE per Year - TAKE THIS AS THE ANNUAL COST – THIS is (£A)

R99. Don't know *EXCLUSIVE*

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month

£29 - £32 per month

£33 - £37 per month

£38 - £41 per month

£42 - £45 per month

£46 - £50 per month

£51 - £54 per month

£55 - £59 per month

£60 - £64 per month

£65 - £69 per month

£70 - £75 per month

£76 - £83 per month

£84+ per month

Annual

Less than £150 per year

£151 - £200 per year

£201 - £250 per year

£251 - £300 per year

£301 - £350 per year

£351 - £400 per year

£401 - £450 per year

£451 - £500 per year

£501 - £550 per year

- £551 - £600 per year
- £601 - £650 per year
- £651 - £700 per year
- £701 - £750 per year
- £751 - £800 per year
- £801 - £900 per year
- £901 - £1,000 per year
- £1,001+ per year
- 98. Don't know
- 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	00
13 - £16 per month	151 - £200 per year	75
17 - £20 per month	201 - £250 per year	25
21 - £24 per month	251 - £300 per year	75
25 - £28 per month	301 - £350 per year	25
29 - £32 per month	351 - £400 per year	75
33 - £37 per month	401 - £450 per year	25
38 - £41 per month	451 - £500 per year	75
42 - £45 per month	501 - £550 per year	25
46 - £50 per month	551 - £600 per year	75
51 - £54 per month	601 - £650 per year	25
56 - £59 per month	651 - £700 per year	75
60 - £64 per month	701 - £750 per year	25
65 - £69 per month	751 - £800 per year	75

0 - £75 per month	01 - £900 per year	50
6 - £83 per month	01 - £1,000 per year	50
4+ per month	,001+ per year	,050
Don't know		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)
Prefer not to say		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM

Compared with other customers, that's quite a high bill.

If this doesn't look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3)

A typical annual clean water bill for a household customer in your area is currently around (TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141) per year.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF UNMETERED OR DON'T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:

For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network.



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network.



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap.

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation's water bill.

S ASK NHHs. Show image 'how the water retail market works'

Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

10) One bill covering both clean water and waste water services

- 11) A separate bill for clean water and a separate bill for waste water
- 12) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

Less than £13 per month (Less than £150 per year) – MIDPOINT £100

£13 - £16 per month (£151 - £200 per year) – MIDPOINT £175

£17 - £23 per month (£201 - £300 per year) – MIDPOINT £250

£24 - £40 per month (£301 - £500 per year) – MIDPOINT £400

£41 - £64 per month (£501 - £750 per year) – MIDPOINT £625

£65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875

£84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500

£167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000

£334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000

£501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000

£834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
 £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
 £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
 £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
 £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
 £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
 £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
 Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>
200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water).**

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(£A) per year on its total water bill. This means your organisation spends around £(£A x0.37 CAM OR x0.46 SSW – PN: Calculate)) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(£A) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(£A) per year on its total water bill. This means that your organisation spends around £(£A x0.37 CAM OR x0.46 SSW) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(£A) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately £($\text{EA} = \text{MIDPOINT VALUE FROM Q1b} \times 0.37 \text{ CAM OR } \times 0.46 \text{ SSW}$) per year on clean water services from (**TEXT SUB FROM QHIDAREA**: Cambridge Water / South Staffs Water).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £($\text{EA} = \text{MIDPOINT VALUE FROM Q1b}$) Thanks for confirming, we estimate that your organisation spends approximately **Q1b** per year on clean water services from (**TEXT SUB FROM QHIDAREA**: Cambridge Water / South Staffs Water).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use £**[TEXT SUB FROM C1c]** per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your current clean water bill?

- 43. Very easy
- 44. Fairly easy
- 45. Neither easy nor difficult
- 46. Fairly difficult
- 47. Very difficult
- 48. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**. The following questions will relate to the provision of clean water to your home (if domestic) or place or work (NHH). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if South Staffs) / Anglian Water (if CAM).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied									Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money					Very good value for money	Don't know
1	2	3	4	5	98	

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 43) Had to raise a query about your water bill
- 44) Had to raise a query about a water meter or installing a meter
- 45) Needed to raise a customer service complaint, or one about your water supply
- 46) Discolouration of water coming out of your tap
- 47) A change to the taste and/or smell of your tap water
- 48) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 49) A temporary loss of water supply - for more than one hour
- 50) A leak in the underground pipe that supplies water to your property from the mains pipe
- 51) Low water pressure
- 52) Flooding from a burst pipe
- 53) A hose pipe ban
- 54) Traffic disruption caused by water works
- 55) Other (please specify) **ANCHOR**
- 56) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

NEW PAGE
SHOW ALL

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- **SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)**

About South Staffs Water



- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge



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

About Cambridge Water



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall



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

To give you an idea of their size you'll see below some facts and figures about South Staffs Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 8 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 4.3 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 1.36 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 0.35 million clean water consumers

Employees:

- Thames Water: 7,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 7,000
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 5,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 339
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 110

MC ASK ALL (MUST SELECT 1, MAX SELECT 3)

Q5a What advantages, if any, do you think there are for customers supplied by a smaller water company? Please select up to three.

RANDOMIZE

58. I don't think there are any advantages of being served by a small water company **[ANCHOR and EXCLUSIVE]**
59. Better knowledge of the local area
60. Closer to the communities it serves
61. Employ local people
62. Ability to innovate and come up with new ideas
63. Lower bills
64. More accountable to customers
65. More flexible, adaptable and agile
66. More responsive to customer needs
67. More honest
68. More trustworthy
69. Personal service
70. Quicker to develop new ideas / ways of doing things
71. Quicker response times to issues
72. Greater access to funds/money markets to make investments
73. Less likely to be taken over by another company
74. More resilient in a crisis
75. Other – please write in as much detail as possible: **[ANCHOR]**
76. Other – please write in as much detail as possible: **[ANCHOR]**

S ASK ALL

Q6 If you had the choice, what size of water company would you like (enter 'your organisation' if NHH) to be served by? Please pick a number on a scale of 0 to 10, where 0 represents a small water company, and 10 represents a large water company.

Small										Large
0	1	2	3	4	5	6	7	8	9	10

MC ASK ALL

Q7 Like most water companies, <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**>.

SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D

Cambridge Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Community Vehicle Water on Wheels
Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.

Additional support for those who need extra help
The company supports over 9,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Showcard D

South Staffs Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Actively supporting local communities
South Staffs' outreach team outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub (W/Wednesday) for people to drop in to speak with the team.

Additional support for those who need extra help
The company supports over 8,700 households on low incomes by offering discounted water bills through their Assure tariff and over 7,600 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Which of these were you aware of before you took part in this study?

28. Education outreach
29. Employee volunteering
30. WaterAid
31. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
32. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
33. Additional support for those who need extra help
34. PEBBLE biodiversity fund
35. SPRING Environmental Protection Scheme
36. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water's Performance

Show all

Over the next few screens we'll show you some charts that highlight how <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we'll show you three as examples.

South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

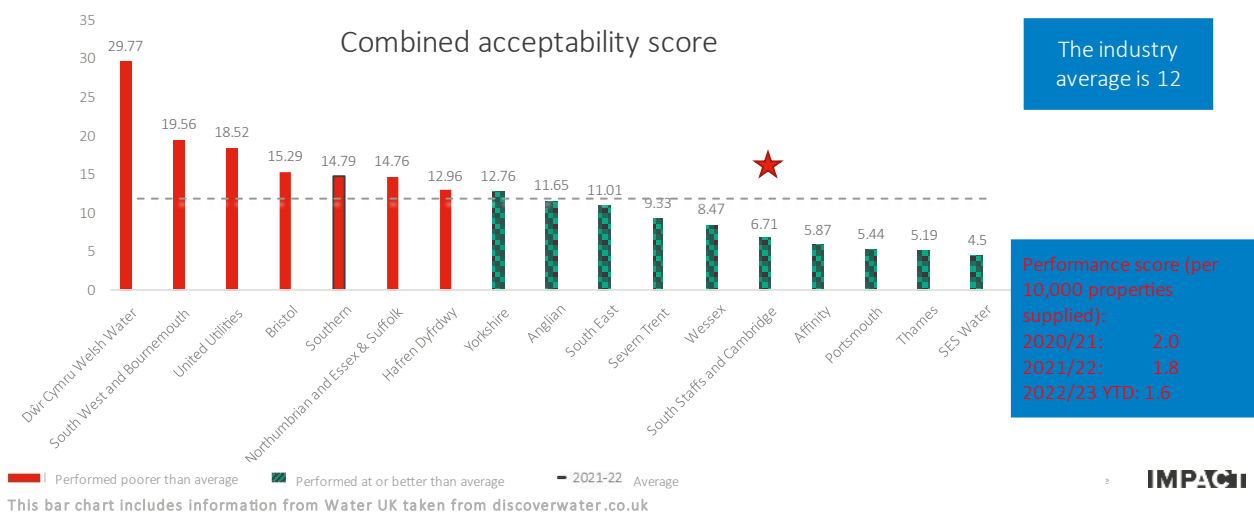
Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company's water is.

Water companies measure the acceptability of their water overall - this is done by calculating a single measure that includes taste, water and colour of the water. The lower the score, the more acceptable the water

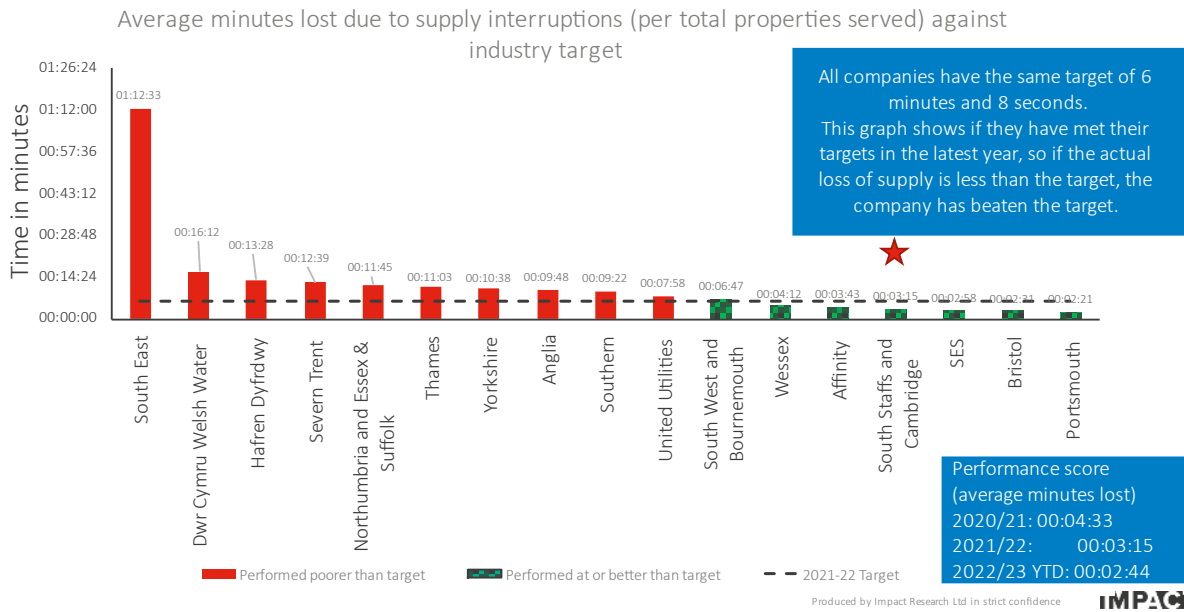


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

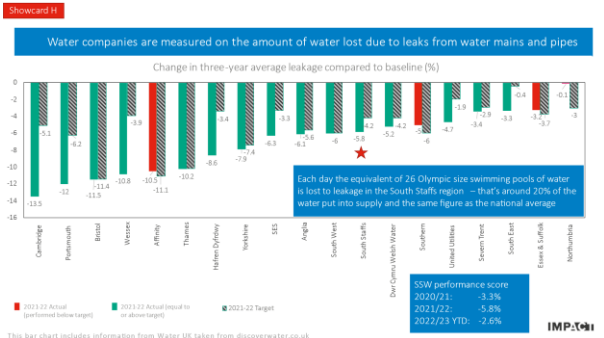
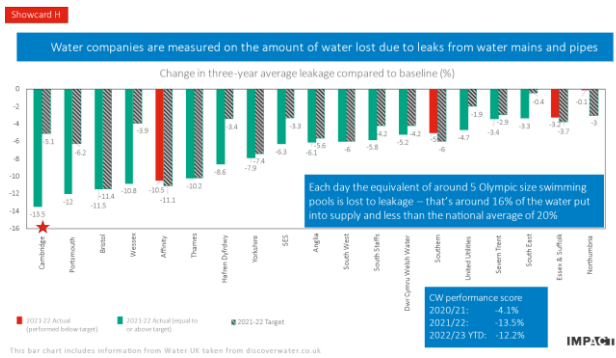
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

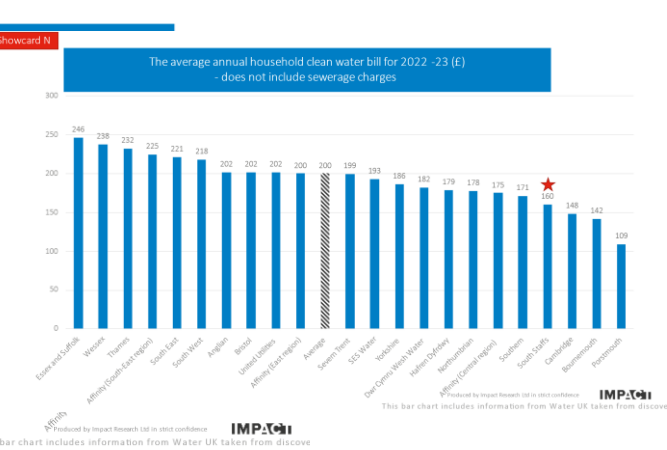
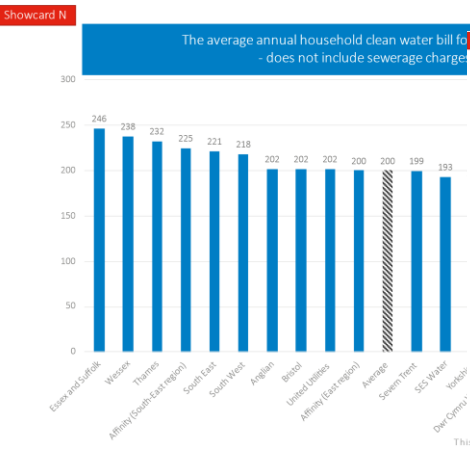


New page
HH ONLY Show
or

showcard N for HH ONLY, with either South Staffs Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more **here**.

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

New page

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

- 13. Yes – in all places
- 14. Yes – but some information could have been clearer
- 15. No – not clear at all
- 16. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

New page

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current average annual household bill for clean water is £160 a year (£13.33 month). This average bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

- 49. Very easy
- 50. Fairly easy
- 51. Neither easy nor difficult
- 52. Fairly difficult
- 53. Very difficult
- 54. Don't know

New page

Info – show all

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

New page

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

13. Yes, I fully understand
14. I understand to an extent
15. No, not at all
16. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

19. Very acceptable
20. Acceptable
21. Neither acceptable nor unacceptable
22. Unacceptable
23. Very unacceptable
24. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL *EITHER*:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO
'unacceptable' (CODE 3 OR 4 OR 5)

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO
'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your <PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH> to afford your water bill if <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) expected annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

- 55. Very easy
- 56. Fairly easy
- 57. Neither easy nor difficult
- 58. Fairly difficult
- 59. Very difficult
- 60. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

- 40. Shopping around more
- 41. Spending less on food shopping and essentials
- 42. Spending less on non-essentials
- 43. Cutting back on non-essential journeys in my vehicle
- 44. Eat out less
- 45. Using less fuel such as gas or electricity in my home
- 46. Using less water
- 47. Using my savings
- 48. Using credit more than usual, for example, credit cards, loans or overdrafts
- 49. Ask family and friends for financial support
- 50. Other (please specify)
- 51. None of the above
- 52. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.

- Option B: You are no longer served by South Staffs Water (if SSW) or Cambridge Water (if CAM), but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

10. Option A: Continue to be served by <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>
11. Option B: Your water company merges with another, and you are served by a much larger water company
12. Not sure ANCHOR

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you (if domestic) your organisation (if NHH). This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you <PIPE IN live if QUIDSAMPLE = DOMESTIC OR work IF QHIDSAMPLE = NHH>?

Please select one option from the following:

16. City center location
17. Other urban location – e.g. suburbs
18. Semi-rural
19. Rural
20. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

61) Indian

62) Pakistani

63) Bangladeshi

64) Chinese

65) Any other Asian Background

Black, Black British, Caribbean or African

66) Caribbean

67) African

68) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

69) White and Black Caribbean

70) White and Black African

71) White and Asian

72) Any other Mixed or multiple ethnic backgrounds

White

73) English, Welsh, Scottish, Northern Irish or British

74) Irish

75) Gypsy or Irish Traveller

76) Roma

77) Any other White background

Other ethnic group

78) Arab

79) Any other ethnic group

80) Prefer not to say

S ASK ALL

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

16. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> never struggle to pay my/our utility bills
17. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
18. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> struggle to pay my utility bills and I/we am often behind in my payments
19. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> always struggle to pay my utility bills and I/we am nearly always behind in my payments
20. <PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH> would rather not say

S ASK DOMESTIC

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

- 34. Up to £365
- 35. £365-£442
- 36. £443-£721
- 37. £722-£1000
- 38. £1001+

Per Year

- 39. Under £19,000
- 40. £19,000 - £23,000
- 41. £23,001 - £37,500
- 42. £37,501 - £52,000
- 43. £52,001+
- 44. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?

The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 13) Yes
- 14) No
- 15) Prefer not to say
- 16) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support.

Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
61. Chronic/serious illness	
62. Medically Dependent Equipment – e.g. dialysis	
63. Oxygen use	
64. Poor sense of smell	
65. Physical Impairment	
66. Unable to answer door	
67. Aged 80 or above	
68. Young children aged 5 or under	
69. Visual impairment – e.g. partially sighted / blind	
70. Partially sighted	
71. Hearing / speech difficulties (including deafness)	

72. English is second language	
73. Limited literacy or numeracy	
74. Living with Dementia	
75. Developmental condition	
76. Mental Health	
77. Low or/and unstable income that makes budgeting finances hard	
78. Temporary - life change for example post hospital recovery, unemployment, infant in the house	
79. None of the above EXCLUSIVE ANCHOR	
80. Prefer not to say EXCLUSIVE ANCHOR	

QHIDVULNERABLE:

- 7 VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 8 NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you’re feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 25. Happy
- 26. Depressed
- 27. Stressed
- 28. Optimistic
- 29. Positive
- 30. Worried
- 31. Energetic
- 32. Tired
- 106. Other (please specify) **ANCHOR**
- 107. Prefer not to say **ANCHOR, EXCLUSIVE**
- 108. Don't know **ANCHOR, EXCLUSIVE**

G

ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

16. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
17. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
18. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
19. Other
20. Not sure

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

S ASK ALL

D14 Thank you for taking the time to give your feedback. Please select how you would like to receive your £5 thank you. Please note if you select a Love2Shop gift voucher, you will need to supply your email address, so it can be sent to you.

7. Love2Shop gift voucher – accepted at over 20,000 retailer outlets
8. Donation to Water Aid – a charity who works globally to ensure more people have access to clean water every day
9. Donation to The Trussell Trust – who run a nationwide network of food banks

O ASK ALL

D14a Please provide your email address so the voucher can be emailed to you.

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

SSW Online panel

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of South Staffs Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 21) Journalism **CLOSE**
- 22) Water Supply or Wastewater services **CLOSE**
- 23) Market Research **CLOSE**
- 24) Academia **CLOSE**
- 25) None of the above **ANCHOR, EXCLUSIVE**

S ASK ALL

S2 Have you taken part in any research study for South Staffs Water in the last 6 months?

1. Yes **THANK & CLOSE**
2. No

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

9) Yes =Qualify for **NHH**

10) No - **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

9) I solely or jointly manage the water bills

10) I don't have any involvement in the water bills **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

13. Home/residential premises **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

14. Separate business premises

15. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

13. Paid directly

14. Included in rent **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

15. **Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR**

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

17. Public sector (e.g., local government, civil service, the NHS, higher education)

18. Private sector (e.g., manufacturing, financial services, hospitality, retail)

19. Charity sector

20. Other **ANCHOR**

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing
- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home [**DOMESTIC**] /workplace [**NHH**]?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**
- **HH F2F**
- **NHH RECRUIT TO ONLINE**

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

- 29. Sole trader
- 30. 2-9
- 31. 10-19
- 32. 20-49
- 33. 50-99
- 34. 100-249
- 35. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

- 17. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
- 18. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
- 19. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
- 20. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

- 49. B **CLASSIFY AS SSW**
- 50. DE **CLASSIFY AS SSW**
- 51. DY **CLASSIFY AS SSW**
- 52. ST **CLASSIFY AS SSW**
- 53. WS **CLASSIFY AS SSW**
- 54. WV **CLASSIFY AS SSW**
- 55. CV **CLASSIFY AS SSW**
- 56. CB **CLASSIFY AS CAM**
- 57. PE **CLASSIFY AS CAM**
- 58. SG **CLASSIFY AS CAM**

- 59. Prefer not to answer **THANK & CLOSE**
- 60. None of the above area codes **THANK & CLOSE**

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <**PIPE IN** South Staffs Water if **S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13)** or Cambridge Water if **S13 = CB, PE or SG (8-10 at S13)**>, is this correct?

- 13. Yes
- 14. No **THANK AND CLOSE**
- 15. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 41) Under 18 years old **CLOSE**
- 42) 18 to 24
- 43) 25 to 29
- 44) 30 to 34

- 45) 35 to 44
- 46) 45 to 54
- 47) 55 to 59
- 48) 60 to 74
- 49) 75 or over
- 50) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

- 25. I have complete responsibility for payment
- 26. I have shared responsibility for payment with others in my household
- 27. I have no responsibility, but I know it is paid by my landlord and included in my rent
- 28. I have no responsibility for payment and I don't know who pays the bills
- 29. Other
- 30. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 17) Male
- 18) Female
- 19) Non-binary or other
- 20) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief 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.

- 49) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 50) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 51) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 52) 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.)
- 53) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 54) Student
- 55) Casual worker – not in permanent employment

- 56) Housewife/ Homemaker
- 57) Retired and living on state pension
- 58) Retired and not living on state pension
- 59) Unemployed or not working due to long-term sickness
- 60) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

- 29. Yes – I/we asked to have one installed
- 30. Yes – it was already in the property when I/we moved in
- 31. Yes – I/we had to have it fitted, but I/we didn't really want it installed
- 32. No – and I/we not interested in getting one
- 33. No – but I/we are considering getting one
- 34. No – I/we had one, but decided to opt out
- 35. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water bill.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a

low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - CALCULATE ANNUAL COST (x52) – THIS is (£A)

£NUMERIC RESPONSE per Month - CALCULATE ANNUAL COST (x12) – THIS is (£A)

£NUMERIC RESPONSE per Quarter - CALCULATE ANNUAL COST (x4) – THIS is (£A)

£NUMERIC RESPONSE every 6 months - CALCULATE ANNUAL COST (x2) – THIS is (£A)

£NUMERIC RESPONSE per Year - TAKE THIS AS THE ANNUAL COST – THIS is (£A)

R99. Don't know *EXCLUSIVE*

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month

£29 - £32 per month

£33 - £37 per month

£38 - £41 per month

£42 - £45 per month

£46 - £50 per month

£51 - £54 per month

£55 - £59 per month

£60 - £64 per month

£65 - £69 per month

£70 - £75 per month

£76 - £83 per month

£84+ per month

Annual

Less than £150 per year

£151 - £200 per year

£201 - £250 per year

£251 - £300 per year

£301 - £350 per year

£351 - £400 per year

- £401 - £450 per year
- £451 - £500 per year
- £501 - £550 per year
- £551 - £600 per year
- £601 - £650 per year
- £651 - £700 per year
- £701 - £750 per year
- £751 - £800 per year
- £801 - £900 per year
- £901 - £1,000 per year
- £1,001+ per year
- 98. Don't know
- 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	00
13 - £16 per month	51 - £200 per year	75
17 - £20 per month	01 - £250 per year	25
21 - £24 per month	51 - £300 per year	75
25 - £28 per month	01 - £350 per year	25
29 - £32 per month	51 - £400 per year	75
33 - £37 per month	01 - £450 per year	25
38 - £41 per month	51 - £500 per year	75
42 - £45 per month	01 - £550 per year	25
46 - £50 per month	51 - £600 per year	75
51 - £54 per month	01 - £650 per year	25

5 - £59 per month	51 - £700 per year	75
0 - £64 per month	01 - £750 per year	25
5 - £69 per month	51 - £800 per year	75
0 - £75 per month	01 - £900 per year	50
6 - £83 per month	01 - £1,000 per year	50
4+ per month	,001+ per year	,050
Don't know		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)
Prefer not to say		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from (**TEXT SUB FROM QUIDAREA: Cambridge Water / South Staffs Water**).

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM
Compared with other customers, that’s quite a high bill.

If this doesn’t look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF ‘Don’t know’ AT B1 AND ‘Don’t know’ OR ‘Prefer not to say’ AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3)

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141**) per year.

IF ‘Don’t know’ AT B1 AND ‘Don’t know’ OR ‘Prefer not to say’ AT B1a - SHOW IF UNMETERED OR DON’T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170**) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:
For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note
When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation’s water bill.

S ASK NHHs. Show image ‘how the water retail market works’ Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

- 13) One bill covering both clean water and waste water services
- 14) A separate bill for clean water and a separate bill for waste water
- 15) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

Less than £13 per month (Less than £150 per year) – MIDPOINT £100

£13 - £16 per month (£151 - £200 per year) – MIDPOINT £175

£17 - £23 per month (£201 - £300 per year) – MIDPOINT £250

£24 - £40 per month (£301 - £500 per year) – MIDPOINT £400

£41 - £64 per month (£501 - £750 per year) – MIDPOINT £625

£65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875

£84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500

£167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000

£334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000

£501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000

£834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
 £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
 £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
 £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
 £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
 £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
 £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
 Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>
200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water).**

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on its total water bill. This means your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW – PN: Calculate**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(**EA**) per year on its total water bill. This means that your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately £($\text{EA} = \text{MIDPOINT VALUE FROM Q1b} \times 0.37 \text{ CAM OR } \times 0.46 \text{ SSW}$) per year on clean water services from (**TEXT SUB FROM QHIDAREA**: Cambridge Water / South Staffs Water).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £($\text{EA} = \text{MIDPOINT VALUE FROM Q1b}$) Thanks for confirming, we estimate that your organisation spends approximately **Q1b**) per year on clean water services from (**TEXT SUB FROM QHIDAREA**: Cambridge Water / South Staffs Water).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use £**[TEXT SUB FROM C1c]** per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your current clean water bill?

- 61. Very easy
- 62. Fairly easy
- 63. Neither easy nor difficult
- 64. Fairly difficult
- 65. Very difficult
- 66. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**. The following questions will relate to the provision of clean water to your home (if domestic) or place or work (NHH). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if South Staffs) / Anglian Water (if CAM).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied										Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98	

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money					Very good value for money	Don't know
1	2	3	4	5	98	

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 57) Had to raise a query about your water bill
- 58) Had to raise a query about a water meter or installing a meter
- 59) Needed to raise a customer service complaint, or one about your water supply
- 60) Discolouration of water coming out of your tap
- 61) A change to the taste and/or smell of your tap water
- 62) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 63) A temporary loss of water supply - for more than one hour
- 64) A leak in the underground pipe that supplies water to your property from the mains pipe
- 65) Low water pressure
- 66) Flooding from a burst pipe
- 67) A hose pipe ban
- 68) Traffic disruption caused by water works
- 69) Other (please specify) **ANCHOR**
- 70) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

NEW PAGE
SHOW ALL

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- **SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)**

About South Staffs Water



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



- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge

About Cambridge Water



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



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall

To give you an idea of their size you'll see below some facts and figures about South Staffs Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 8 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 4.3 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 1.36 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 0.35 million clean water consumers

Employees:

- Thames Water: 7,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 7,000
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 5,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 339
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 110

MC ASK ALL (MUST SELECT 1, MAX SELECT 3)

Q5a What advantages, if any, do you think there are for customers supplied by a smaller water company? Please select up to three.

RANDOMIZE

77. I don't think there are any advantages of being served by a small water company **[ANCHOR and EXCLUSIVE]**
78. Better knowledge of the local area
79. Closer to the communities it serves
80. Employ local people
81. Ability to innovate and come up with new ideas
82. Lower bills
83. More accountable to customers
84. More flexible, adaptable and agile
85. More responsive to customer needs
86. More honest
87. More trustworthy
88. Personal service
89. Quicker to develop new ideas / ways of doing things
90. Quicker response times to issues
91. Greater access to funds/money markets to make investments
92. Less likely to be taken over by another company
93. More resilient in a crisis
94. Other – please write in as much detail as possible: **[ANCHOR]**
95. Other – please write in as much detail as possible: **[ANCHOR]**

S ASK ALL

Q6 If you had the choice, what size of water company would you like (enter 'your organisation' if NHH) to be served by? Please pick a number on a scale of 0 to 10, where 0 represents a small water company, and 10 represents a large water company.

Small										Large
0	1	2	3	4	5	6	7	8	9	10

MC ASK ALL

Q7 Like most water companies, <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**>.

SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D

Cambridge Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Community Vehicle
Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.

Additional support for those who need extra help
The company supports over 9,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Showcard D

South Staffs Water Community and Environmental Initiatives

Education outreach in schools
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.

Employee Volunteering
Donate around 400 volunteer days to the local community every year.

WaterAid
For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.

Actively supporting local communities
South Staffs' outreach team outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub (W/Wednesday) for people to drop in to speak with the team.

Additional support for those who need extra help
The company supports over 8,700 households on low incomes by offering discounted water bills through their Assure tariff and over 7,600 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.

PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.

SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.

Produced by Impact Research Ltd in strict confidence **IMPACT**

Which of these were you aware of before you took part in this study?

- 37. Education outreach
- 38. Employee volunteering
- 39. WaterAid
- 40. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
- 41. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
- 42. Additional support for those who need extra help
- 43. PEBBLE biodiversity fund
- 44. SPRING Environmental Protection Scheme
- 45. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water's Performance

Show all

Over the next few screens we'll show you some charts that highlight how <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we'll show you three as examples.

South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

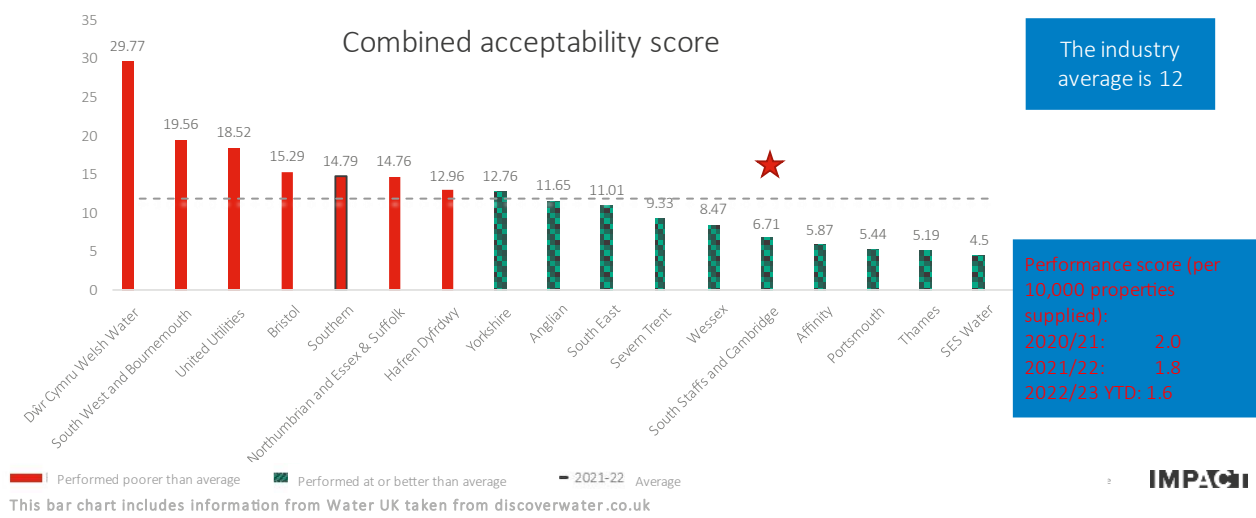
Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company's water is.

Water companies measure the acceptability of their water overall - this is done by calculating a single measure that includes taste, water and colour of the water. The lower the score, the more acceptable the water

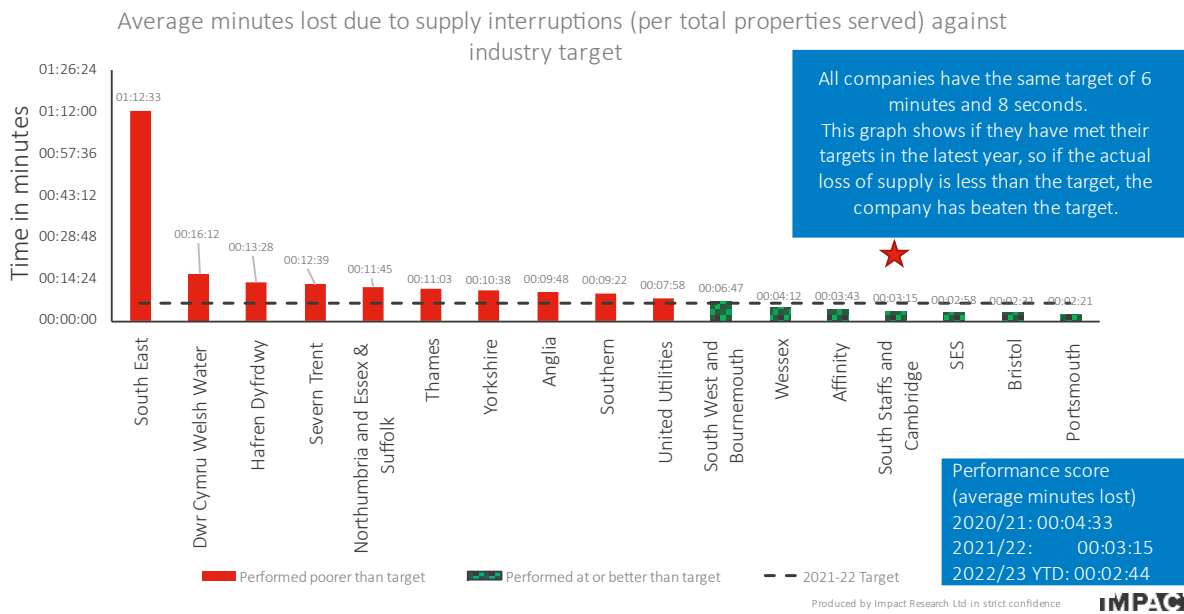


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

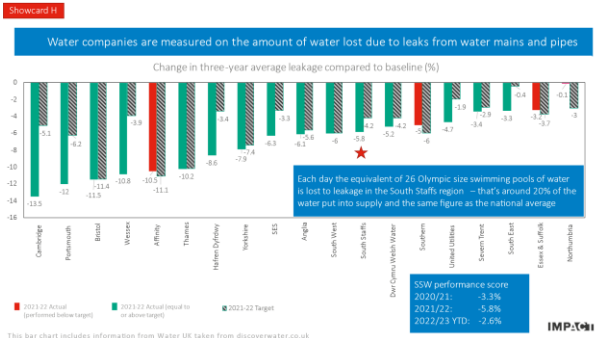
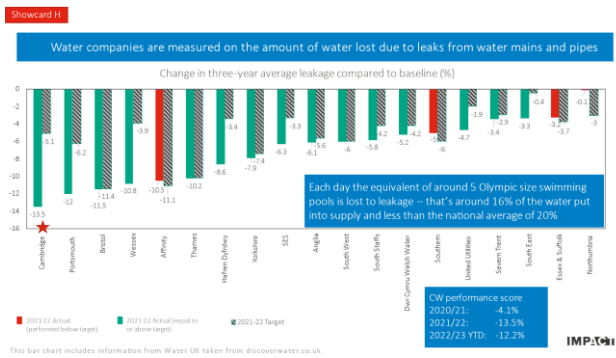
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

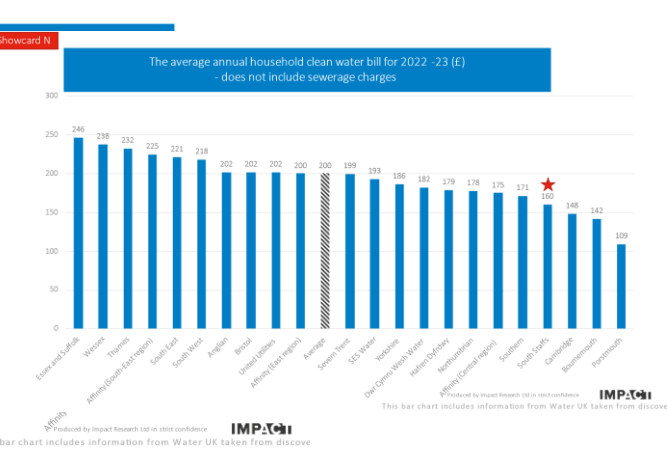
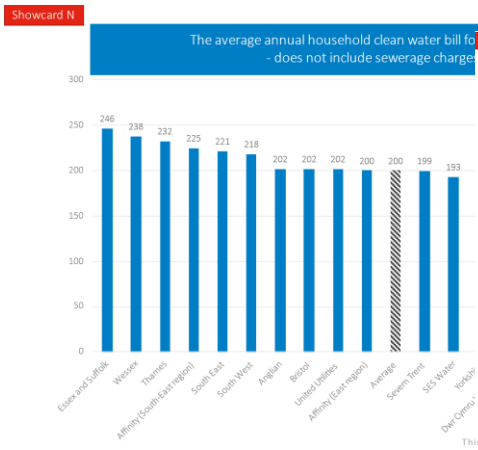


New page
HH
ONLY
Show
or

showcard N for HH ONLY, with either South Staffs
Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more [here](#).

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

New page

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

- 17. Yes – in all places
- 18. Yes – but some information could have been clearer
- 19. No – not clear at all
- 20. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

New page

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current average annual household bill for clean water is £160 a year (£13.33 month). This average bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

- 67. Very easy
- 68. Fairly easy
- 69. Neither easy nor difficult
- 70. Fairly difficult
- 71. Very difficult
- 72. Don't know

New page

Info – show all

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

New page

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

17. Yes, I fully understand
18. I understand to an extent
19. No, not at all
20. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

- 25. Very acceptable
- 26. Acceptable
- 27. Neither acceptable nor unacceptable
- 28. Unacceptable
- 29. Very unacceptable
- 30. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL *EITHER*:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO
'unacceptable' (CODE 3 OR 4 OR 5)

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO
'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your <PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH> to afford your water bill if <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) expected annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

- 73. Very easy
- 74. Fairly easy
- 75. Neither easy nor difficult
- 76. Fairly difficult
- 77. Very difficult
- 78. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

- 53. Shopping around more
- 54. Spending less on food shopping and essentials
- 55. Spending less on non-essentials
- 56. Cutting back on non-essential journeys in my vehicle
- 57. Eat out less
- 58. Using less fuel such as gas or electricity in my home
- 59. Using less water
- 60. Using my savings
- 61. Using credit more than usual, for example, credit cards, loans or overdrafts
- 62. Ask family and friends for financial support
- 63. Other (please specify)
- 64. None of the above
- 65. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.

- Option B: You are no longer served by South Staffs Water (if SSW) or Cambridge Water (if CAM), but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

13. Option A: Continue to be served by <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>
14. Option B: Your water company merges with another, and you are served by a much larger water company
15. Not sure ANCHOR

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you (if domestic) your organisation (if NHH). This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you <PIPE IN live if QUIDSAMPLE = DOMESTIC OR work IF QHIDSAMPLE = NHH>?

Please select one option from the following:

21. City center location
22. Other urban location – e.g. suburbs
23. Semi-rural
24. Rural
25. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

- 81) Indian
- 82) Pakistani
- 83) Bangladeshi
- 84) Chinese
- 85) Any other Asian Background

Black, Black British, Caribbean or African

- 86) Caribbean
- 87) African
- 88) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

- 89) White and Black Caribbean
- 90) White and Black African
- 91) White and Asian
- 92) Any other Mixed or multiple ethnic backgrounds

White

- 93) English, Welsh, Scottish, Northern Irish or British
- 94) Irish
- 95) Gypsy or Irish Traveller
- 96) Roma
- 97) Any other White background

Other ethnic group

- 98) Arab
- 99) Any other ethnic group

- 100) Prefer not to say

S **ASK ALL**

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

- 21. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** never struggle to pay my/our utility bills
- 22. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
- 23. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** struggle to pay my utility bills and I/we am often behind in my payments
- 24. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** always struggle to pay my utility bills and I/we am nearly always behind in my payments
- 25. **<PIPE IN I/ my household if QUIDSAMPLE = DOMESTIC OR My organisation IF QHIDSAMPLE = NHH>** would rather not say

S **ASK DOMESTIC**

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

- 45. Up to £365
- 46. £365-£442
- 47. £443-£721
- 48. £722-£1000
- 49. £1001+

Per Year

- 50. Under £19,000
- 51. £19,000 - £23,000
- 52. £23,001 - £37,500
- 53. £37,501 - £52,000
- 54. £52,001+
- 55. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?
The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 17) Yes
- 18) No
- 19) Prefer not to say
- 20) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support. Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
81. Chronic/serious illness	
82. Medically Dependent Equipment – e.g. dialysis	
83. Oxygen use	
84. Poor sense of smell	
85. Physical Impairment	
86. Unable to answer door	
87. Aged 80 or above	
88. Young children aged 5 or under	
89. Visual impairment – e.g. partially sighted / blind	
90. Partially sighted	
91. Hearing / speech difficulties (including deafness)	

92. English is second language	
93. Limited literacy or numeracy	
94. Living with Dementia	
95. Developmental condition	
96. Mental Health	
97. Low or/and unstable income that makes budgeting finances hard	
98. Temporary - life change for example post hospital recovery, unemployment, infant in the house	
99. None of the above EXCLUSIVE ANCHOR	
100. Prefer not to say EXCLUSIVE ANCHOR	

QHIDVULNERABLE:

- 9 **VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 10 **NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 33. Happy
- 34. Depressed
- 35. Stressed
- 36. Optimistic
- 37. Positive
- 38. Worried
- 39. Energetic
- 40. Tired
- 109. Other (please specify) **ANCHOR**
- 110. Prefer not to say **ANCHOR, EXCLUSIVE**
- 111. Don't know **ANCHOR, EXCLUSIVE**

G

ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

21. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
 22. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
 23. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
 24. Other
 25. Not sure
-

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

SSW SSC sample

March 2023

Thank you for agreeing to participate in this important research study. Giving your feedback should take no more than 15 minutes, depending on the answers you give us.

This study is being run by Impact Research, an independent market research agency, on behalf of South Staffs Water. The company will be using your feedback to help put together its next business plan for the period 2025 to 2030.

This is a genuine market research study and no sales call will result from our contact with you. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

Before continuing with the survey, and in order to comply with current data protection legislation, we need to make you aware of a few things.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this study.

Start study

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries during this study? You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENING

SHOW ALL

First of all, we would like to ask you a few questions about yourself, to make sure we are gaining the views of people from all different backgrounds.

M ASK ALL

IF CODE 1-4 CLOSE/RANDOMIZE/ANCHOR CODE 5

S1 Do you, or anybody in your household, work in any of the following areas?

- 26) Journalism **CLOSE**
- 27) Water Supply or Wastewater services **CLOSE**
- 28) Market Research **CLOSE**
- 29) Academia **CLOSE**
- 30) None of the above **ANCHOR, EXCLUSIVE**

S ASK ALL

S2 Have you taken part in any research study for South Staffs Water in the last 6 months?

1. Yes **THANK & CLOSE**
2. No

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

S ASK ALL

S3 Are you currently in paid employment?

11) Yes =Qualify for **NHH**

12) No - **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

S ASK IF S3=1

S5 How much involvement, if any, do you have in managing the utilities bills for your business, including your water bills?

11) I solely or jointly manage the water bills

12) I don't have any involvement in the water bills **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

ASK IF CODE S5 = 1

S6 Does your business operate from a home/residential premises or from a separate business premises?

16. Home/residential premises **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

17. Separate business premises

18. I operate from both a home/residential premises and a separate business premises

ASK IF S6 = 2 OR 3

S7 Does your organisation pay directly for the water and wastewater services your organisation uses, or is the cost included within your rent?

16. Paid directly

17. Included in rent **QHIDSAMPLE=DOMESTIC, SKIP TO S4**

18. **Other QHIDSAMPLE=DOMESTIC, SKIP TO S4 ANCHOR**

ASK IF S7 = 1

S8a Which of the following company types best describes the organisation you work for?

21. Public sector (e.g., local government, civil service, the NHS, higher education)

22. Private sector (e.g., manufacturing, financial services, hospitality, retail)

23. Charity sector

24. Other **ANCHOR**

ASK IF S7 = 1

RANDOMIZE/ANCHOR CODE 19

S8b And what business sector best defines the main activity of the organisation you work for?

- 1 : Agriculture, forestry & fishing
- 2 : Mining, quarrying & utilities
- 3 : Manufacturing
- 4 : Construction
- 5 : Motor trades
- 6 : Wholesale
- 7 : Retail
- 8 : Transport & storage (inc. postal)
- 9 : Accommodation & food services
- 10 : Information & communication
- 11 : Financial & insurance
- 12 : Property
- 13 : Professional, scientific & technical
- 14 : Business administration & support services
- 15 : Public administration & defense
- 16 : Education
- 17 : Health
- 18 : Arts, entertainment, recreation & other services
- 19: Other (Please state) **ANCHOR**
- 20: Don't know, **QHIDSAMPLE=DOMESTIC ANCHOR**

G ASK ALL

S4 Which of the following do you have in your home [**DOMESTIC**] /workplace [**NHH**]?

1	Mains clean water supply, e.g., the water from your kitchen or other taps comes from a mains water pipes.	YES	NO
2	Mains wastewater e.g., the waste water from flushing your toilet goes into mains sewer pipes	YES	NO
3	Other e.g., septic tank for wastewater, OR you are on a private water supply ANCHOR	YES	NO
MUST CODE 1 AND 2 AS YES TO CONTINUE, AND YES in CODES 2 AND 3 ARE NOT SELECTED TOGETHER IF YES Selected at 2 AND 3 TOGETHER CLOSE.			

QHIDSAMPLE:

NHH IF S5=1 AND S6=2 or 3 AND S7=1 AND S8b = 1-18, OTHERWISE DOMESTIC

PN: At some places in the Qnaire, Domestic is also referred as Household.

PROGRAMMER: PLEASE CREATE SEPARATE LINKS FOR INTERVIEWS LISTED BELOW THAT IS FOLLOWING THE SAME ROUTING AS PANEL SAMPLE (BOTH NHH AND DOMESTIC), ALL QUOTAS OPEN:

- **HH CLIENT SUPPLIED SAMPLE**
- **HH F2F**
- **NHH RECRUIT TO ONLINE**

South Staffs Water

Client sample: 25000 links needed

Face-to-face survey links: 200 needed

Recruit-to-online links: 200 needed

S ASK IF NHH

S9 How many staff does your organisation employ?

- 36. Sole trader
- 37. 2-9
- 38. 10-19
- 39. 20-49
- 40. 50-99
- 41. 100-249
- 42. 250+

ASK IF CODE NHH

S10 Thinking about water consumption, which of the following best describes your organisation?

- 21. **Lower water consumption** - For example, you are not a heavy water user such as a hairdresser, retail shop, office with fewer than 50 employees
- 22. **Medium water consumption** - For example, an office of more than 50 employees, a car wash, a large business where water is not a key component, small farmer
- 23. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farming operation
- 24. **Don't know**

INFO 1

NHH: DISPLAY TEXT (Show for NHH Respondents only)

As you are involved in managing the water bills for your organisation, please represent the viewpoint of your organisation rather than your personal views when giving your answers.

S ASK ALL

S13 What's the first half of your postcode? We will only use this to check who provides your water.

- 61. B CLASSIFY AS SSW
- 62. DE CLASSIFY AS SSW
- 63. DY CLASSIFY AS SSW
- 64. ST CLASSIFY AS SSW
- 65. WS CLASSIFY AS SSW
- 66. WV CLASSIFY AS SSW
- 67. CV CLASSIFY AS SSW
- 68. CB CLASSIFY AS CAM
- 69. PE CLASSIFY AS CAM
- 70. SG CLASSIFY AS CAM

- 71. Prefer not to answer **THANK & CLOSE**
- 72. None of the above area codes **THANK & CLOSE**

QUOTA CHECK (ONLINE PANEL): PN: SSW and CAM are being assigned at S13

SSW NHH = 45

SSW DOMESTIC = 245

CAM NHH = 20

CAM DOMESTIC = 105

S ASK ALL

S14 According to our records, your water bills are paid to <PIPE IN South Staffs Water if **S13 = B, DE, DY, ST, WS, WV or CV (1-7 at S13)** or Cambridge Water if **S13 = CB, PE or SG (8-10 at S13)**>, is this correct?

- 16. Yes
- 17. No **THANK AND CLOSE**
- 18. Don't know **THANK AND CLOSE**

If S14 = 1, ALLOCATE TO COMPANY:

CLASSIFY QHIDAREA AS 'SSW' IF S13 = 1-7, OR 'CAM' IF 8-10

NHH: Skip to (NHH) bill calculation section)

S ASK DOMESTIC CUSTOMERS

S15 Which of the following age bands do you fall into?

- 51) Under 18 years old **CLOSE**
- 52) 18 to 24
- 53) 25 to 29
- 54) 30 to 34

- 55) 35 to 44
- 56) 45 to 54
- 57) 55 to 59
- 58) 60 to 74
- 59) 75 or over
- 60) Prefer not say **CLOSE FOR F2F/RTO (but no not close for CLIENT CAM or CLIENT SSW sample)**

S ASK DOMESTIC CUSTOMERS

S12 Are you the person, or one of the people, in your household who pays the water bills?

- 31. I have complete responsibility for payment
- 32. I have shared responsibility for payment with others in my household
- 33. I have no responsibility, but I know it is paid by my landlord and included in my rent
- 34. I have no responsibility for payment and I don't know who pays the bills
- 35. Other
- 36. Don't know **THANK & CLOSE**

IF S12 = 3 AND S15 = 2-4 CLASSIFY AS 'FUTURE CUSTOMER'. QUOTA TBC

S ASK DOMESTIC CUSTOMERS

S16 What is your gender?

- 21) Male
- 22) Female
- 23) Non-binary or other
- 24) Prefer not to say

S ASK ALL DOMESTIC CUSTOMERS

S17 Which ONE of the following categories best describes the employment status of the **Chief Income Earner** in your household? If you or the chief 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.

- 61) Semi or unskilled manual worker (e.g., Caretaker, Park keeper, non-HGV driver, shop assistant etc.)
- 62) Skilled manual worker (e.g., Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)
- 63) Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
- 64) 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.)
- 65) Higher managerial/ professional/ administrative (e.g., Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
- 66) Student
- 67) Casual worker – not in permanent employment

- 68) Housewife/ Homemaker
- 69) Retired and living on state pension
- 70) Retired and not living on state pension
- 71) Unemployed or not working due to long-term sickness
- 72) Full-time carer of other household member

S ASK IF CODE 10 AT S17

S18 Which ONE of the following categories best describes the employment status of the Chief Income Earner *before* they retired?

SHOW THE SAME LIST AS S17, EXCLUDING CODES 9 AND 10

AUTOMATICALLY CODE QUESTIONS S17 AND S18 INTO SOCIAL ECONOMIC GRADE AS FOLLOWS:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 11 OR 12	E

S ASK HOUSEHOLD (Domestic) CUSTOMERS

S19 Do you have a water meter at your home?

- 36. Yes – I/we asked to have one installed
- 37. Yes – it was already in the property when I/we moved in
- 38. Yes – I/we had to have it fitted, but I/we didn't really want it installed
- 39. No – and I/we not interested in getting one
- 40. No – but I/we are considering getting one
- 41. No – I/we had one, but decided to opt out
- 42. Don't Know = SHOW UNMETERED TEXT

(HH) bill calculation

The next question is about your water bill.

OE ASK ALL DOMESTIC

B1. To make sure we ask the questions in a way that reflects your water usage and how much you pay, please tell us how much your total water bill usually is (including clean water and waste water) to the nearest pound.

If your household receives a discounted water bill, due to either you or someone in your household having a medical condition (such as the WaterSure tariff) and/or being on a

low income (such as the Assure tariff), please take this into account when telling us what your total water bill is.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - CALCULATE ANNUAL COST (x52) – THIS is (£A)

£NUMERIC RESPONSE per Month - CALCULATE ANNUAL COST (x12) – THIS is (£A)

£NUMERIC RESPONSE per Quarter - CALCULATE ANNUAL COST (x4) – THIS is (£A)

£NUMERIC RESPONSE every 6 months - CALCULATE ANNUAL COST (x2) – THIS is (£A)

£NUMERIC RESPONSE per Year - TAKE THIS AS THE ANNUAL COST – THIS is (£A)

R99. Don't know *EXCLUSIVE*

IF 'Don't know' GO TO B1a, OTHERS Skip B1a

NEW SCREEN

IF 'Don't know' AT B1 ASK B1a:

S ASK ALL DOMESTIC

B1a. Which of the following bands would you estimate most accurately reflects how much your total water and wastewater bill usually is?

You can provide a monthly or annual estimate below.

PN: Only one response required.

Monthly

Less than £13 per month

£13 - £16 per month

£17 - £20 per month

£21 - £24 per month

£25 - £28 per month

£29 - £32 per month

£33 - £37 per month

£38 - £41 per month

£42 - £45 per month

£46 - £50 per month

£51 - £54 per month

£55 - £59 per month

£60 - £64 per month

£65 - £69 per month

£70 - £75 per month

£76 - £83 per month

£84+ per month

Annual

Less than £150 per year

£151 - £200 per year

£201 - £250 per year

£251 - £300 per year

£301 - £350 per year

£351 - £400 per year

- £401 - £450 per year
- £451 - £500 per year
- £501 - £550 per year
- £551 - £600 per year
- £601 - £650 per year
- £651 - £700 per year
- £701 - £750 per year
- £751 - £800 per year
- £801 - £900 per year
- £901 - £1,000 per year
- £1,001+ per year
- 98. Don't know
- 99. Prefer not to say

THE TABLE BELOW SHOWS THE MID-POINT TO USE FOR (£A) FOR THOSE ANSWERING B1a

Monthly	Annual	Midpoint for bill calc
Less than £13 per month	Less than £150 per year	00
13 - £16 per month	51 - £200 per year	75
17 - £20 per month	01 - £250 per year	25
21 - £24 per month	51 - £300 per year	75
25 - £28 per month	01 - £350 per year	25
29 - £32 per month	51 - £400 per year	75
33 - £37 per month	01 - £450 per year	25
38 - £41 per month	51 - £500 per year	75
42 - £45 per month	01 - £550 per year	25
46 - £50 per month	51 - £600 per year	75
51 - £54 per month	01 - £650 per year	25

5 - £59 per month	51 - £700 per year	75
0 - £64 per month	01 - £750 per year	25
5 - £69 per month	51 - £800 per year	75
0 - £75 per month	01 - £900 per year	50
6 - £83 per month	01 - £1,000 per year	50
4+ per month	,001+ per year	,050
don't know		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)
prefer not to say		55 (SS Metered) 64 (SS Unmetered) 41 (CW Metered) 70 (CW Unmetered)

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT (Mid-Point in the table above)

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM QHIDAREA: Cambridge Water IF QHIDAREA=CAM / South Staffs Water IF QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF SSW: Severn Trent Water/ TEXT SUB IF CAM: Anglian Water)**.

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY//6 MONTHLY AT B1: Based on your response you spend **£(£A)** per year on your total water bill which means you spend around **£(£A x0.37 CAM OR x0.46 SSW – (PN Calculate))** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF YEARLY AT B1: Thanks for confirming you total spend of **£(£A)** per year on your water bill. This means that you spend around **£(£A x0.37 CAM OR x0.46 SSW)** per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water)**.

TEXT SUB IF PROVIDED A BAND AT B1a: Based on your response we estimate that you spend approximately **£(MIDPOINT VALUE x0.37 CAM OR x0.46 SSW)** per year on clean water services from (**TEXT SUB FROM QUIDAREA: Cambridge Water / South Staffs Water**).

SHOW IF ANNUAL BILL IS MORE THAN £1,000 PER YEAR FLAG FOR THEM
Compared with other customers, that's quite a high bill.

If this doesn't look right you can go back and amend this figure by clicking on the PREVIOUS button below.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF METERED (FROM SAMPLE – S19 Code 1-3)

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £155 / TEXT SUB IF CAM: £141**) per year.

IF 'Don't know' AT B1 AND 'Don't know' OR 'Prefer not to say' AT B1a - SHOW IF UNMETERED OR DON'T KNOW (FROM SAMPLE S19 Code 4-7);

A typical annual clean water bill for a household customer in your area is currently around (**TEXT SUB IF SSW: £164 / TEXT SUB IF CAM: £170**) per year.

ADD POP UP OF BELOW IMAGES (FOR SSW OR CAM) LINKED TO FOLLOWING TEXT:
For more information on how your clean water bill is calculated see below.

Understanding your clean water and waste water bill

You receive your clean water and waste water bill from South Staffs Water. However, South Staffs Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Severn Trent and they are responsible for taking the waste water away from your property.

54%

Of your water bill goes to Severn Trent and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



46%

Of your water bill goes to South Staffs Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



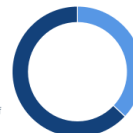
Understanding your clean water and waste water bill

You receive your clean water and waste water bill from Cambridge Water. However, Cambridge Water only provide services related to your clean water supply i.e. the supply of water through the taps to your property.

Your waste water service is supplied by Anglian Water and they are responsible for taking the waste water away from your property.

63%

Of your water bill goes to Anglian Water and is used to take the waste water and sewerage away from your property and for the management and operation of the sewer network



37%

Of your water bill goes to Cambridge Water and is used to provide you with a safe, high quality clean water supply every time you turn on the tap

Please note

When we ask questions about your bill, please remember to think about the part of your bill related to clean water services.



(NHH) bill calculation

Show for NHHs only (QHIDSAMPLE = NHH)

The next few questions are about your organisation's water bill.

S ASK NHHs. Show image 'how the water retail market works'

Q5

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. The picture below explains how this arrangement works.

Does your organisation receive a single water bill covering both clean water and waste water services, or does it receive a different bill for each one?

- 16) One bill covering both clean water and waste water services
- 17) A separate bill for clean water and a separate bill for waste water
- 18) Don't know



OE ASK NHHS ONLY

C1. To make sure we ask the questions in a way that reflects your organisation's water usage and how much it pays, please tell us how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** usually is to the nearest pound.

It doesn't matter who you pay your bill to.

Your best estimate is fine. Please do not enter decimal points or commas.

You can tell us the weekly, monthly, quarterly, 6-monthly or annual costs, whichever suits you.

PN: Only one response required.

£NUMERIC RESPONSE per Week - **CALCULATE ANNUAL COST (x52) – THIS is (£A)**

£NUMERIC RESPONSE per Month - **CALCULATE ANNUAL COST (x12) – THIS is (£A)**

£NUMERIC RESPONSE per Quarter - **CALCULATE ANNUAL COST (x4) – THIS is (£A)**

£NUMERIC RESPONSE every 6 months - **CALCULATE ANNUAL COST (x2) – THIS is (£A)**

£NUMERIC RESPONSE per Year - **TAKE THIS AS THE ANNUAL COST – THIS is (£A)**

R99 Don't know **EXCLUSIVE**

IF 'Don't know' GO TO C1b, OTHERS SKIP C1b and C1c

NEW SCREEN

IF 'Don't know' AT C1 ASK C1b:

S ASK NHHs C1b IF 'Don't know' AT C1

C1b If you aren't sure exactly how much your **(TEXT SUB FROM Q5: IF ONE BILL OR DON'T KNOW: total water bill / IF SEPARATE BILLS: clean water bill)** is, please indicate which of the following bands best represents how much you pay?

ANNUAL MIDPOINTS ARE SHOWN BELOW

Less than £13 per month (Less than £150 per year) – MIDPOINT £100

£13 - £16 per month (£151 - £200 per year) – MIDPOINT £175

£17 - £23 per month (£201 - £300 per year) – MIDPOINT £250

£24 - £40 per month (£301 - £500 per year) – MIDPOINT £400

£41 - £64 per month (£501 - £750 per year) – MIDPOINT £625

£65 - £83 per month (£751 - £1,000 per year) – MIDPOINT £875

£84 - £166 per month (£1,001 - £2,000 per year) – MIDPOINT £1,500

£167 - £333 per month (£2,001 - £4,000 per year) – MIDPOINT £3,000

£334 - £500 per month (£4,001 - £6,000 per year) – MIDPOINT £5,000

£501 - £833 per month (£6,001 - £10,000 per year) – MIDPOINT £8,000

£834 - £1,666 per month (£10,001 - £20,000 per year) – MIDPOINT £15,000
 £1,667 - £4,166 per month (£20,001 - £50,000 per year) – MIDPOINT £35,000
 £4,167 - £8,333 per month (£50,001 - £100,000 per year) – MIDPOINT £75,000
 £8,334 - £20,833 per month (£100,001 - £250,000 per year) – MIDPOINT £175,000
 £20,834 - £41,666 per month (£250,001 - £500,000 per year) – MIDPOINT £375,000
 £41,667 - £83,333 per month (£500,001 - £1m per year) – MIDPOINT £750,000
 £83,334 or more per month (more than £1m per year) – MIDPOINT £1,500,000
 Don't know

NEXT SCREEN

ASK NHHs C1c IF 'Don't know' AT C1b

C1c. So we can ask you questions about your organisation's water bill in the future, we'd like you to estimate from the table below how much it currently pays each year.

The table shows some annual usage levels for clean water and how this compares to a typical household, along with the approximate clean water bill for that level of use.

The figures cover clean water only - wastewater charges are excluded.

Please look at the usage levels and select the bill value that you think is most likely to apply to your organisation.

Only show amount for CAM or SSW

Annual clean water usage	Comparison with an average household	Approximate annual clean water bill	TICK ONE ONLY
100 m ³	Equivalent to 1 household	SSW: £137 CAM: £115	<input type="checkbox"/>
200 m ³	Equivalent to 2 households	SSW: £251 CAM: £207	<input type="checkbox"/>
300 m ³	Equivalent to 3 households	SSW: £365 CAM: £298	<input type="checkbox"/>
400 m ³	Equivalent to 4 households	SSW: £478 CAM: £390	<input type="checkbox"/>
500 m ³	Equivalent to 5 households	SSW: £592 CAM: £482	<input type="checkbox"/>
1,000 m ³	Equivalent to 10 households	SSW: £1,161 CAM: £940	<input type="checkbox"/>
50,000 m ³	Very high usage - equivalent to 500 households	SSW: £56,077 CAM: £45,885	<input type="checkbox"/>
250,000 m ³	Very high usage - equivalent to more than 500 households	SSW: £202,029 CAM: £181,399	<input type="checkbox"/>

NOTE: £A IS THE VALUE OF EACH RESPONDENT'S ANNUAL CLEAN WATER BILL, EITHER CALCULATED FROM THE BILL AMOUNT THEY HAVE PROVIDED OR USING AN AVERAGE BILL AMOUNT FROM C1b OR C1c. -RECORD THIS AMOUNT

SHOW IF TOTAL WATER BILL ASKED ABOUT AT C1/C1b:

Your total water bill is split between a charge for clean water services that goes to **(TEXT SUB FROM SAMPLE: Cambridge Water IF QHIDAREA=CAM /South Staffs Water / QHIDAREA=SSW)** and a charge for waste water services that goes to **(TEXT SUB IF QHIDAREA=SSW: Severn Trent Water/ TEXT SUB IF QHIDAREA=CAM: Anglian Water).**

SHOW NHHs

This survey is about the clean water part of your bill only.

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND TOTAL BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on its total water bill. This means your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW – PN: Calculate**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF WEEKLY/MONTHLY/QUARTERLY/6 MONTHLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Based on your response, your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM SAMPLE: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND TOTAL BILL ASKED AT C1:

Thanks for confirming that your organisation has a total spend of £(**EA**) per year on its total water bill. This means that your organisation spends around £(**EA x0.37 CAM OR x0.46 SSW**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF YEARLY AT C1 AND CLEAN WATER BILL ASKED AT C1:

Thanks for confirming that your organisation spends £(**EA**) per year on clean water services from **(TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water).**

TEXT SUB IF TOTAL WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b:

Based on your response, we estimate that your organisation spends approximately **£(£A = MIDPOINT VALUE FROM Q1b x0.37 CAM OR x0.46 SSW)** per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF CLEAN WATER BILL ASKED AT C1 AND A BAND PROVIDED AT C1b: £(£A = MIDPOINT VALUE FROM Q1b) Thanks for confirming, we estimate that your organisation spends approximately **Q1b** per year on clean water services from (**TEXT SUB FROM QHIDAREA: Cambridge Water / South Staffs Water**).

TEXT SUB IF C1c ASKED;

Thanks for confirming, we'll use **£[TEXT SUB FROM C1c]** per year as the clean water bill for your organisation for the rest of this survey.

E1 How easy or difficult is it currently for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford your current clean water bill?

- 79. Very easy
- 80. Fairly easy
- 81. Neither easy nor difficult
- 82. Fairly difficult
- 83. Very difficult
- 84. Don't know

AWARENESS AND SATISFACTION WITH SSC

INFO

As mentioned previously, this research is being conducted on behalf of your water supplier, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>**. The following questions will relate to the provision of clean water to your home (if domestic) or place or work (NHH). We will not be asking you about your wastewater or sewerage services which are provided by Severn Trent (if South Staffs) / Anglian Water (if CAM).

S ASK ALL

Q2 How satisfied are you with the **overall service** provided by **PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 10-point scale, where 1 is very unsatisfied and 10 is very satisfied.

Very unsatisfied									Very satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	98

S ASK ALL

Q3 How would you rate the **value for money** of the services you receive from **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM**? Please use a 5-point scale, where 1 is very poor value for money and 5 is very good value for money.

Very poor value for money					Very good value for money	Don't know
1	2	3	4	5	98	

MC ASK ALL

Q3a 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. **RANDOMIZE**

- 71) Had to raise a query about your water bill
- 72) Had to raise a query about a water meter or installing a meter
- 73) Needed to raise a customer service complaint, or one about your water supply
- 74) Discolouration of water coming out of your tap
- 75) A change to the taste and/or smell of your tap water
- 76) A problem relating to limescale in the water – such as a failure of an appliance, or stained taps/showerheads
- 77) A temporary loss of water supply - for more than one hour
- 78) A leak in the underground pipe that supplies water to your property from the mains pipe
- 79) Low water pressure
- 80) Flooding from a burst pipe
- 81) A hose pipe ban
- 82) Traffic disruption caused by water works
- 83) Other (please specify) **ANCHOR**
- 84) I haven't experienced any of these **ANCHOR [Exclusive]**

AWARENESS AND SATISFACTION WITH SSC

We'd now like to tell you a bit more information about your **[NHH: organisation's]** water company.

NEW PAGE
SHOW ALL

CAPI: Show screen or please use Showcard below

The water companies in England are a mix of larger companies and smaller companies. Your water company is one of the smaller companies covering a smaller area.

See the image below to see more information about where your water company supplies services- **SHOW CAM IMAGE IF QHIDAREA= CAM (one image for HH CAM and one for NHH CAM), AND SHOW SSW IMAGE IF QHIDAREA=SSW (different images for HH and NHH)**

About South Staffs Water



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



- Serves 1.3 million people across 1,500 km²
- Supply approx. 556,000 homes and almost 35,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 20 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% and 5% of customers' bills each year
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge

About Cambridge Water



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



- Serves almost 360,000 people across 1,175sq km
- Supply approx. 140,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you can't choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is between 2% - 5% of customers' bills each year
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall

To give you an idea of their size you'll see below some facts and figures about South Staffs Water and how they compare to larger water companies operating in their neighbouring areas, which handle both clean water supply and taking away waste water from properties. We've also shown Thames Water, which is the largest company in the UK:

Customers: SHOWN TO ALL

- Thames Water: 10 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 8 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 4.3 million clean water consumers
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 1.36 million clean water consumers
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 0.35 million clean water consumers

Employees:

- Thames Water: 7,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW)** Severn Trent Water: 7,000
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Anglian Water: 5,000
- **SHOW ONLY FOR SOUTH STAFFS (if QHIDAREA=SSW):** South Staffs Water: 339
- **SHOW ONLY FOR CW (IF QUIDAREA = CAM)** Cambridge Water: 110

MC ASK ALL (MUST SELECT 1, MAX SELECT 3)

Q5a What advantages, if any, do you think there are for customers supplied by a smaller water company? Please select up to three.

RANDOMIZE

96. I don't think there are any advantages of being served by a small water company **[ANCHOR and EXCLUSIVE]**
97. Better knowledge of the local area
98. Closer to the communities it serves
99. Employ local people
100. Ability to innovate and come up with new ideas
101. Lower bills
102. More accountable to customers
103. More flexible, adaptable and agile
104. More responsive to customer needs
105. More honest
106. More trustworthy
107. Personal service
108. Quicker to develop new ideas / ways of doing things
109. Quicker response times to issues
110. Greater access to funds/money markets to make investments
111. Less likely to be taken over by another company
112. More resilient in a crisis
113. Other – please write in as much detail as possible: **[ANCHOR]**
114. Other – please write in as much detail as possible: **[ANCHOR]**

S ASK ALL

Q6 If you had the choice, what size of water company would you like (enter 'your organisation' if NHH) to be served by? Please pick a number on a scale of 0 to 10, where 0 represents a small water company, and 10 represents a large water company.

Small										Large
0	1	2	3	4	5	6	7	8	9	10


MC ASK ALL

Q7 Like most water companies, <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> has a number of schemes, initiatives and services aimed at supporting the communities they serve. The main ones are shown below. Please note that all water companies offer schemes like these, but these are unique to <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**>.


SHOW EITHER SOUTH STAFFS OR CAM DEPENDING ON QHIDAREA

Showcard D


Cambridge Water Community and Environmental Initiatives




Education outreach in schools
Engaged with over 350 pupils during 2021/22 through workshops to educate about water being a precious resource.




Employee Volunteering
Donate around 400 volunteer days to the local community every year.




WaterAid
Cambridge Water works with and supports WaterAid to help transform the lives of thousands of people who don't have access to clean water.




Community Vehicle Water on Wheels
Cambridge Water's outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services.



Additional support for those who need extra help
The company supports over 9,360 households on low incomes by offering discounted water bills through their Assure tariff and over 8,900 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.



PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.




SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.


Produced by Impact Research Ltd in strict confidence. **IMPACT**

Showcard D


South Staffs Water Community and Environmental Initiatives




Education outreach in schools
Engaged with over 3,700 pupils during 2021/22 through workshops to educate about water being a precious resource.




Employee Volunteering
Donate around 400 volunteer days to the local community every year.




WaterAid
For over 30 years, South Staffs has worked with and supported WaterAid to help transform the lives of thousands of people who don't have access to clean water.




Additional support for those who need extra help
The company supports over 8,700 households on low incomes by offering discounted water bills through their Assure tariff and over 7,600 in their priority services register who need extra help accessing their water services e.g. bottled water drops if the water supply is cut off for a period.



SPRING Environmental Protection Scheme
Farmers can apply for a grant up to £10,000 per farm, towards the costs of voluntary of farm infrastructural improvements and land management options designed to protect the environment and improve water quality.



PEBBLE biodiversity fund
Funding of up to £10,000 available for projects aiming to improve, restore or create habitats and/or which have a community benefit. This scheme runs each year.



Actively supporting local communities
South Staffs' outreach team outreach team travel to the region's more deprived locations and provide locals with advice and support about their water services. They also run a Community Hub (W/Wednesday) for people to drop in to speak with the team.

Produced by Impact Research Ltd in strict confidence. **IMPACT**

Which of these were you aware of before you took part in this study?

- 46. Education outreach
- 47. Employee volunteering
- 48. WaterAid
- 49. Community vehicle – **SHOW FOR CAM ONLY (IF QHIDAREA=CAM)**
- 50. Actively supporting local communities through its Community Hub – **SHOW FOR SOUTH STAFFS ONLY (IF QHIDAREA= SSW)**
- 51. Additional support for those who need extra help
- 52. PEBBLE biodiversity fund
- 53. SPRING Environmental Protection Scheme
- 54. None of the above **ANCHOR EXCLUSIVE**

South Staffs and Cambridge Water's Performance

Show all

Over the next few screens we'll show you some charts that highlight how <**PIPE IN** South Staffs Water if **QHIDAREA= SSW** or Cambridge Water if **QHIDAREA= CAM**> compares against the other water companies in England and Wales. Its performance is independently monitored by industry regulators and other organisations over a number of areas, but we'll show you three as examples.

South Staffs and Cambridge Water merged in April 2013, so some of the performance data is shown for both regions combined together as this is how it is officially reported to the regulator Ofwat each year.

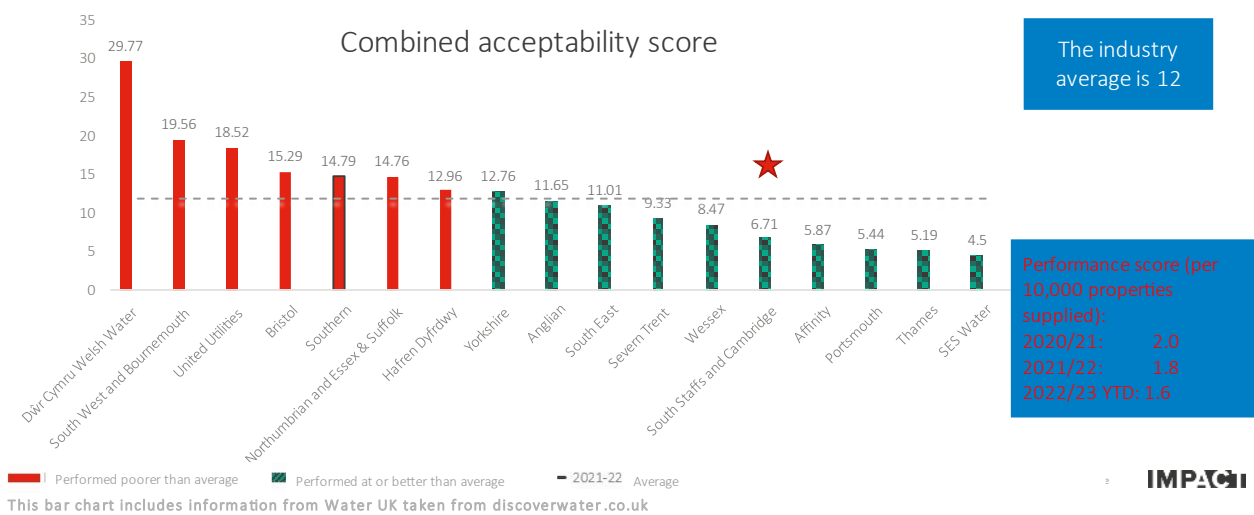
Please note that a red star is shown next to your water company.

New page

Show a4 image below text

This first graph (**Showcard F**) shows the combined acceptability score for water quality for each of the water companies. This figure is independently calculated, and combines scores for taste, smell and colour. The lower the score overall, the more acceptable a company's water is.

Water companies measure the acceptability of their water overall - this is done by calculating a single measure that includes taste, water and colour of the water. The lower the score, the more acceptable the water

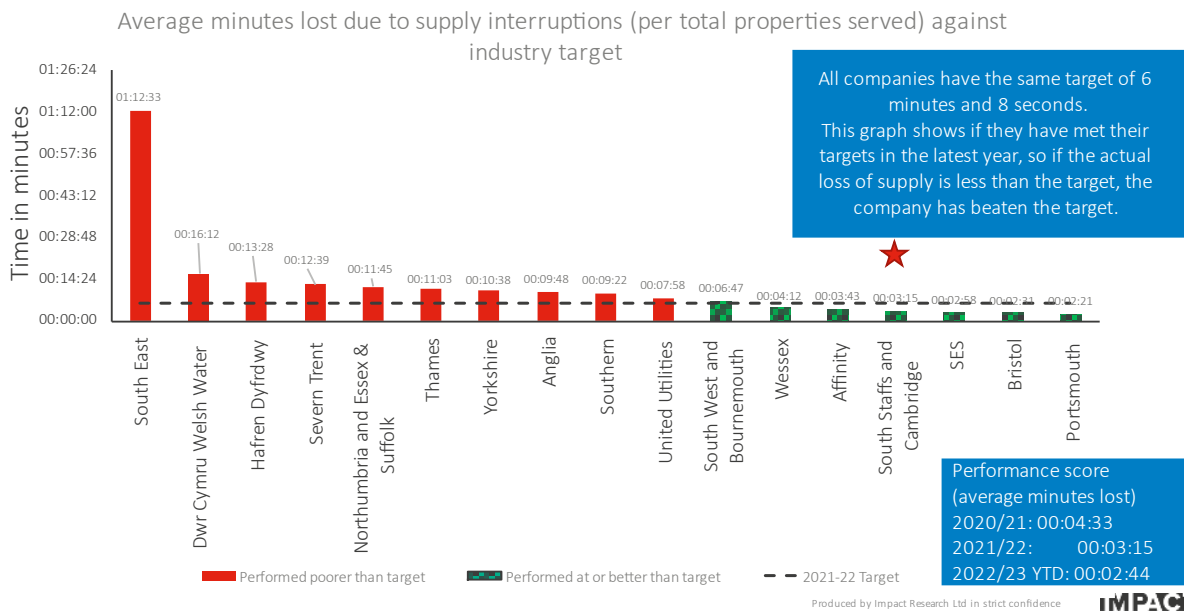


New page

Show showcard G image below text

This next graph (**showcard G**) shows the average length of time properties are without water. Most customers will not experience an interruption to their water supply in a typical year. Your water company counts all the properties that are affected, and how long they are affected for, to then work out the average length of time they were without water. Remember this is the average time and around 5 in 100 (5%) of temporary interruptions that happen last longer than 6 hours.

The average length of time properties are without water



This bar chart includes information from Water UK taken from discoverwater.co.uk

New page

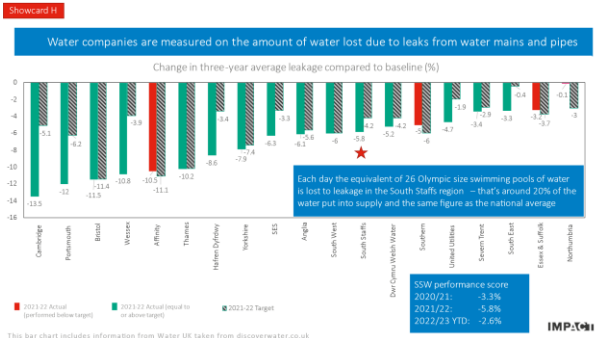
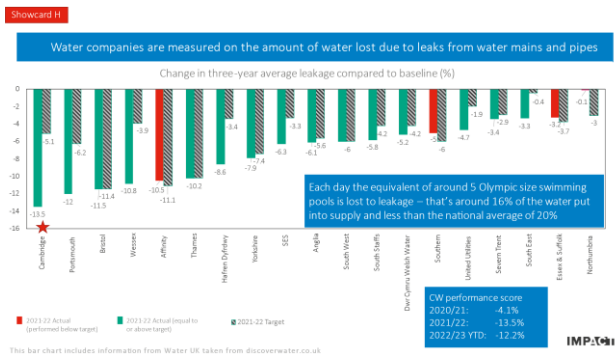
Show showcard H image below text. Show CAM image if Cambridge, or South Staffs if South Staffs customer.

All companies have been set targets by Ofwat to reduce leakage from pipes. The graph shows whether water companies have met their targets over the last three years. The larger bars on the left of the graph, show the largest reduction, and the largest height difference between the green and checked bars show the companies that have exceeded the target the most. **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** has exceeded their leakage reduction target in 2021/22 by reducing leakage levels on average by **5.8% (show IF QHIDAREA=SSW) 13.5% (show IF QHIDAREA= CAM)** over the last 3 years. Those companies with bars in red did not meet their leakage reduction target.

However, **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** performance so far in 2022/23 has not been as good as the previous two years and it is likely to fail its target for the year. This is mainly due to the very hot weather in the summer of 2022 and the recent cold winter temperatures – these temperature extremes cause more pipes to burst due to extra movement in dry ground, and freezing then thawing in the winter.

It's also important to have in mind that 70% of water lost to leaks comes from pipes owned by the company and 30% from pipes owned by customers on their properties.

Show CAM image if Cambridge, or south staffs if South Staffs customer.

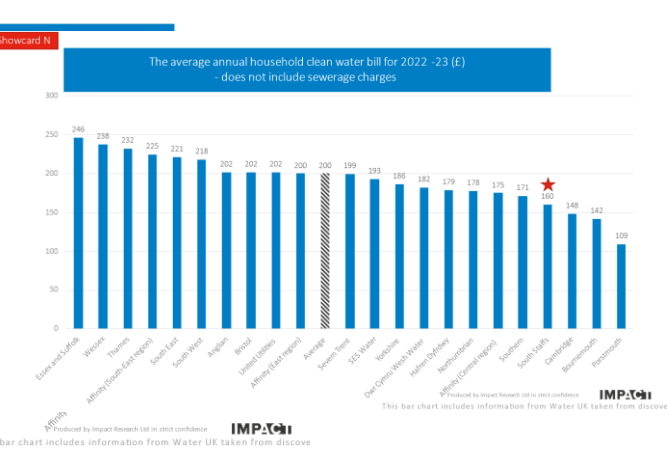
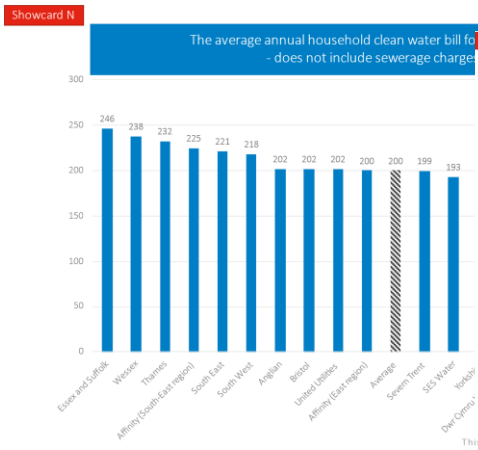


New page
HH
ONLY
Show
or

showcard N for HH ONLY, with either South Staffs
Cambridge region displayed IF QHIDAREA= SSW or if QHIDAREA= CAM

Here you can see the average household clean water bills for 2022-23 for <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> and other water companies in England and Wales. As you can see, the average clean water bill in this region is at the lower end of the range. This might not reflect your own bill, but provides a sense of how the bills in this region compare to other areas of the country.

The variation of the bill levels across the country is complex. Whilst the company has choice in many areas on what to spend money on, the bill level is partly, due to the local context that the company operates in. For example, a company has little choice over where to take its water from, how much treatment is needed for water from different sources, or how much pumping is needed to get treated water through the pipes to customers in different parts of the region it serves.



New page

Another measure of performance that can be used to see how your water company is doing is its Annual Performance Report. This shows how performing on 30 different performance commitments in its current business plan for 2020 to 2025, by showing if it has achieved its own targets or not. These measures are just for your water company. These commitments fall into different outcome areas, such as customers, community, environment and service.

For the year 2021/22, South Staffs and Cambridge Water passed 18 of the targets it is measured against, and **failed 12 of its targets**. Find out more [here](#).

SCRIPTER, can the 'here' above, show the text below as a pop up

For example, a couple of targets the company has been failing between 2020 to 2022 are running enough education workshops to teach children about the need to value water in schools and they are also behind their target to reduce how much water each person uses which is achieved through a range of activities such as offering water meters, advice and support to help people use less water at home. Both of these programmes of work have been impacted by the COVID pandemic as schools closed and people were at home more during lockdowns and now with more working from home.

[New page](#)

S ASK ALL

Q8a1 Was everything clear to you when considering the information you have just read, including the charts?

21. Yes – in all places
22. Yes – but some information could have been clearer
23. No – not clear at all
24. Not sure

OE ASK if Q8a1 = 2 or 3

Q8a2 Please explain what information was not clear

OE ASK ALL

Q8b Considering all the information you have just seen, overall, how do you feel **SOUTH STAFFS / Cambridge Water** is performing in comparison to other water companies in the UK on the services you have seen – leaks, water supply interruptions and contacts about water quality?

[New page](#)

The next planning period for water companies, begins in 2025 and will cover a period of five years to 2030. Before this, all customers' water bills will be reviewed to reflect the cost to water companies of delivering a range of service improvements to meet the long-term challenges the company faces – including a growing population, changing rainfall and weather patterns and increased levels of pollution in the environment.

This means it is vital to keep improving and upgrading water treatment works to improve water quality, investing in new sources of water (like reservoirs) to secure future water supplies, replacing pipes at a faster rate, to further reducing leakage levels and the number of bursts that can lead to the water supply being temporarily cut off for customers whilst they are repaired. Also, investing to reduce carbon and other greenhouse gas emissions from its operations, programmes that restore the water environment (such as rivers and streams), improving the customer service to make it easier and quicker to contact the company and offering more support for customers who need extra help to access the companies' services and pay their bills.

SHOW FOR SOUTH STAFFS HHs In your region, the current average annual household bill for clean water is £160 a year (£13.33 month). This average bill is expected, for 2025-2030, to rise to **£199 a year** (£16.58 a month). That's a 24% increase. The impact of **inflation (approx. £24) is included** in this increase.

As a reminder, your current clean water bill is approximately **<PIPE IN £A>** in 2022/23.

SHOW FOR Cambridge HHs In your region, the current annual household bill for clean water is £148 a year (£12.33 month). This is expected, for 2025-2030, to rise to **£186 a year** (£15.50 a month). That's a 25% increase. The impact of **inflation (approx. £23) is included** in this increase.

SCRIPTER: ADD POP OUT TEXT BOX, ON WORD 'INFLATION' ABOVE, TO READ BELOW:

Inflation is the rise in the general level of prices. The Bank of England tries to keep inflation at 2%, but the actual level has recently risen well above that. Inflation for the 12 months to February 2023, was 10.4%. the information shared works on the assumption that inflation will reduce to around 2% in 2 years from now, however this may not happen.

In this case your water bill would increase by the rate of inflation at that time, which could be higher than 2%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR SOUTH STAFFS NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **24%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 24%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

SHOW FOR CAMBRIDGE NHHs In your region, for the period of 2025-2030, non-household customer bills for clean water are expected to rise by **25%**. The impact of **inflation is included** in this, and is expected to account for approximately 15% of the 25%.

As a reminder, your current clean water bill is approximately **< PIPE IN £A>** in 2022/23.

OE ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9a What is your initial reaction to this proposed increase for your clean water bill for the period 2025-2030?

Minimum 4 word validation

S ASK ALL SHOW ON SAME SCREEN AS INTRO TEXT

Q9b How easy or difficult do you think it would be for your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH>** to afford these clean water bills for the period of 2025 to 2030?

- 85. Very easy
- 86. Fairly easy
- 87. Neither easy nor difficult
- 88. Fairly difficult
- 89. Very difficult
- 90. Don't know

New page

Info – show all

In England and Wales, household customers do not have a choice when it comes to their water and wastewater (sewerage) supplier. Ofwat is the economic regulator for the water industry and its role is to ensure that customers' interests are protected and that they receive high quality and reliable services at an affordable price.

Every five years, Ofwat runs a price review, where they decide the price, service, and investment levels that water companies have to deliver. This also decides the price of customers' water bills for the next 5 years.

Ofwat decides these service levels by comparing all water companies against one another on performance areas such as water quality, leakage and customer service.

New page

This next section is the main focus of this study so please read this information carefully.

Water companies have to borrow money to fund investment programmes that can cost tens of millions of pounds to deliver every year (such as updating water treatment works).

- Borrowing money from lenders means water companies have to pay interest payments, as all companies would have to
- The interest rate varies depending on how much money is borrowed, over what time frame, and the types of financial products available

All water companies have to do this, **BUT**:

- Larger companies have more freedom over accessing funds from places like banks
- These larger companies can access funds in larger amounts, and at times to take advantage of lower interest rates
- Your water company is fairly small, so they borrow money less often and in lower amounts, so this can mean a higher interest rate
- So, it costs **<PIPE IN** South Staffs Water **if QHIDAREA= SSW** or Cambridge Water **if QHIDAREA= CAM**> more to maintain their assets (e.g. pipes, treatment works)
- A real-life example of this concept would be taking out a personal loan to buy a car or other large item. Most banks offer a lower interest rate the more you borrow.

To help with this problem, Ofwat can allow smaller water companies to plan for a higher cost of borrowing and so charge slightly higher prices to their customers. This is called a **Company Specific Adjustment**. However, Ofwat will only allow this to happen if it is convinced it is the right approach that is in the best interests of customers.

S ASK ALL

Q10 From this explanation, do you understand what a company specific adjustment is?

21. Yes, I fully understand
22. I understand to an extent
23. No, not at all
24. I am not sure

S ASK ALL

Q12a

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year £186 a year. That's a 24% increase. Your own bill will increase by 24%, so please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%. Please have this in mind when answering the rest of the questions.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%. Please have this in mind when answering the rest of the questions.

Your water company is interested to know your views on paying an additional amount each year on your **<PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation's IF QHIDSAMPLE = NHH>** water bills for 2025 to 2030 to pay for a company specific adjustment and so fund the higher cost of borrowing to fund major investments. Please note this charge is to be applied on top of the bill increase we have previously mentioned and does not include any potential changes in the bills customers will pay for their waste water services.

Given that there are unknowns in the future around the cost of borrowing money for water companies this is your chance to tell us what amount would be acceptable.

QHIDSETUPCHARGE = ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS, and 4 TO 6 for NHHs IN THE TABLE BELOW

	Household		Non household
	Annual	Monthly	Annual
1	£0.00	£0.00	+0%
2	£0.50	£0.04	+0.25%
3	£1.00	£0.08	+0.5%
4	£1.50	£0.13	+1%
5	£2.00	£0.16	+1.5%
6	£2.50	£0.21	+2%
7	£3.00	£0.25	+2.5%
8	£3.50	£0.29	+3%
9	£4.00	£0.33	
10	£4.50	£0.38	

Based on everything you have read, how acceptable or unacceptable is it to you that **<PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM>** applies an additional company specific adjustment charge of **PIPE IN QHIDSETUPCHARGE ON LEAST FILL SELECT ONE VALUE FROM LEVELS 3, 5 OR 7 for HHS £x each year (£XX per month), and 4 TO 6 for NHHs x% each year** between 2025 to 2030?

31. Very acceptable
32. Acceptable
33. Neither acceptable nor unacceptable
34. Unacceptable
35. Very unacceptable
36. I don't know enough at the moment to give an answer

When repeating the question, only shown the last paragraph (the one that appears after the graph), but this should start with 'Based on your last response,' rather than 'based on everything you have read'

IF Q12a=6 SKIP TO NEW SCREEN BEFORE Q13

IF Q12a= 1 or 2

REPLACE QHIDSETUPCHARGE WITH QHIDSETUPCHARGE + 1 LEVEL (e.g., if start point is level 5 - from £2.00 TO £2.50)

ELSE

REPLACE QHIDSETUPCHARGE = QHIDSETUPCHARGE - 1 LEVEL (e.g., from £1.50 TO £1.00)

THEN

REPEAT COMPANY SPECIFIC ADJUSTMENT premium UNTIL *EITHER*:
COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'acceptable' (CODE 1 OR 2) TO
'unacceptable' (CODE 3 OR 4 OR 5)

OR

COMPANY SPECIFIC ADJUSTMENT premium changes FROM 'unacceptable' (CODE 3 OR 4 OR 5) TO
'acceptable' (CODE 1 OR 2)

OR

One end of the price scale has been reached

(for DOMESTIC HHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra £1 and £4.50 on your annual water bill each year between 2025 and 2030.
(for NHHs) If your water company does implement the company specific adjustment charge, it will likely be between an extra 0.5% and 2.5% on top of your organisation's annual water bill each year between 2025 and 2030.

OE ASK ALL

Q12b From your previous answer it seems that you think the maximum acceptable charge for the company specific adjustment is **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on your annual bill. Please tell us the reasons why this amount is **acceptable** for your household (**HH customers**) or organisation (**NHHs**).

S ASK ALL

Q12d How easy or difficult would it be for your <PIPE IN household if QUIDSAMPLE = DOMESTIC OR organisation IF QHIDSAMPLE = NHH> to afford your water bill if <PIPE IN South Staffs Water if QHIDAREA= SSW or Cambridge Water if QHIDAREA= CAM> applies an additional company specific adjustment charge each year of **PIPE IN FINAL ACCEPTABLE RESPONSE FROM END OF PRICE SCALE FROM Q12A £XX for HHs or XX% for NHHs OR 0% for NHHs or £0 for HHs IF THEY SAY UNACCEPTABLE TO ALL LEVELS** on top of your household's (**HH customers**) or organisation's (**NHHs**) expected annual clean water bill for the period 2025-2030?

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = SSW

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £160 a year to £199 a year. That's a 24% increase.

SHOW IF QUIDSAMPLE = DOMESTIC AND IF QHIDAREA = CAM

Just to remind you, that the average clean water bill in this region is expected to increase in 2025, from £148 a year to £186 a year. That's a 24% increase.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = SSW

Just to remind you, that your water bill is expected to increase in 2025, by about 24%.

SHOW IF QHIDSAMPLE = NHH AND IF QHIDAREA = CAM

Just to remind you, that your water bill is expected to increase in 2025, by about 25%.

- 91. Very easy
- 92. Fairly easy
- 93. Neither easy nor difficult
- 94. Fairly difficult
- 95. Very difficult
- 96. Don't know

M ASK IF Q12d=3-5 AND HH ONLY

Q12e Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? Please select all that apply.

- 66. Shopping around more
- 67. Spending less on food shopping and essentials
- 68. Spending less on non-essentials
- 69. Cutting back on non-essential journeys in my vehicle
- 70. Eat out less
- 71. Using less fuel such as gas or electricity in my home
- 72. Using less water
- 73. Using my savings
- 74. Using credit more than usual, for example, credit cards, loans or overdrafts
- 75. Ask family and friends for financial support
- 76. Other (please specify)
- 77. None of the above
- 78. Don't know

NEW PAGE

We are now going to look at the other potential option for customers versus paying an additional amount for a company specific adjustment. These are two potential options. When making your choice please do reflect on all the information you have read in this study.

- Option A **FOR HHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between £1 – £4.50) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.
- Option A **FOR NHHS ONLY**: Your water company implements the extra charge per year between 2025 and 2030 (which could be between 0.5% - 2.5%) for a 'company specific adjustment' and continues to operate the way that it currently does and deliver its agreed plan.

- Option B: You are no longer served by South Staffs Water **(if SSW)** or Cambridge Water **(if CAM)**, but by a much larger water company. (Please note that this is just a possibility that could be considered by the company).

S ASK ALL – SHOW ON SAME SCREEN AS INTRO TEXT

Q13a If you had the choice, which option would you prefer?

16. Option A: Continue to be served by **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or** Cambridge Water **if QHIDAREA= CAM>**
17. Option B: Your water company merges with another, and you are served by a much larger water company
18. Not sure **ANCHOR**

OE ASK ALL

Q13b Why did you give that answer?

Minimum 4 word validation

DEMOGRAPHICS

SHOW ALL

In this final section, we would like to ask you a few questions about you **(if domestic)** your organisation **(if NHH)**. This will help us understand your responses.

S ASK ALL

D1 How would you describe the location where you **<PIPE IN** live **if QUIDSAMPLE = DOMESTIC OR** work **IF QHIDSAMPLE = NHH>?**

Please select one option from the following:

26. City center location
27. Other urban location – e.g. suburbs
28. Semi-rural
29. Rural
30. Don't know

INFO: SHOW IF DOMESTIC

For the next few questions, please be reassured that information will not be passed back to **<PIPE IN** South Staffs Water **if QHIDAREA= SSW or** Cambridge Water **if QHIDAREA= CAM>** on an individual level. We intend to use this information to ensure we are surveying a range of different customers.

S ASK DOMESTIC

D5 Which of the following best describes your background?

Asian or Asian British

- 101) Indian
- 102) Pakistani
- 103) Bangladeshi
- 104) Chinese
- 105) Any other Asian Background

Black, Black British, Caribbean or African

- 106) Caribbean
- 107) African
- 108) Any other Black, Black British, or Caribbean Background

Mixed or multiple ethnic groups

- 109) White and Black Caribbean
- 110) White and Black African
- 111) White and Asian
- 112) Any other Mixed or multiple ethnic backgrounds

White

- 113) English, Welsh, Scottish, Northern Irish or British
- 114) Irish
- 115) Gypsy or Irish Traveller
- 116) Roma
- 117) Any other White background

Other ethnic group

- 118) Arab
- 119) Any other ethnic group

- 120) Prefer not to say

S **ASK ALL**

D6 We would like to understand a little more about how your financial situation is affected by your water, gas and electricity bills. Which of the following statements best describes your situation?

- 26. <PIPE IN I/ my household if **QUIDSAMPLE = DOMESTIC OR** My organisation IF **QHIDSAMPLE = NHH**> never struggle to pay my/our utility bills
- 27. <PIPE IN I/ my household if **QUIDSAMPLE = DOMESTIC OR** My organisation IF **QHIDSAMPLE = NHH**> sometimes struggle to pay my utility bills but I/we usually manage to keep on top of them
- 28. <PIPE IN I/ my household if **QUIDSAMPLE = DOMESTIC OR** My organisation IF **QHIDSAMPLE = NHH**> struggle to pay my utility bills and I/we am often behind in my payments
- 29. <PIPE IN I/ my household if **QUIDSAMPLE = DOMESTIC OR** My organisation IF **QHIDSAMPLE = NHH**> always struggle to pay my utility bills and I/we am nearly always behind in my payments
- 30. <PIPE IN I/ my household if **QUIDSAMPLE = DOMESTIC OR** My organisation IF **QHIDSAMPLE = NHH**> would rather not say

S **ASK DOMESTIC**

D7 What is your annual household after any taxes, but before any housing costs (e.g., mortgage or rental payments)?

You can give your answer as per week or per year, whichever you prefer.

Per Week

- 56. Up to £365
- 57. £365-£442
- 58. £443-£721
- 59. £722-£1000
- 60. £1001+

Per Year

- 61. Under £19,000
- 62. £19,000 - £23,000
- 63. £23,001 - £37,500
- 64. £37,501 - £52,000
- 65. £52,001+
- 66. Prefer not to say

S ASK DOMESTIC

D8 Is anyone in your household registered on the Priority Service Register?
The Priority Service Register is for customers who may need extra support or additional services – such as bottled water drops to home if the supply is temporarily cut off.

- 21) Yes
- 22) No
- 23) Prefer not to say
- 24) Don't know

M ASK DOMESTIC

D9 There are a wide range of factors that could mean **anyone** might need extra help or support. Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support?

RANDOMISE	You or anyone in your household
101. Chronic/serious illness	
102. Medically Dependent Equipment – e.g. dialysis	
103. Oxygen use	
104. Poor sense of smell	
105. Physical Impairment	
106. Unable to answer door	
107. Aged 80 or above	
108. Young children aged 5 or under	
109. Visual impairment – e.g. partially sighted / blind	
110. Partially sighted	
111. Hearing / speech difficulties (including deafness)	

112.	English is second language	
113.	Limited literacy or numeracy	
114.	Living with Dementia	
115.	Developmental condition	
116.	Mental Health	
117.	Low or/and unstable income that makes budgeting finances hard	
118.	Temporary - life change for example post hospital recovery, unemployment, infant in the house	
119.	None of the above	EXCLUSIVE ANCHOR
120.	Prefer not to say	EXCLUSIVE ANCHOR

QHIDVULNERABLE:

- 11 VULNERABLE - IF SELECT CODES 1-18 AT D9 OR CODE 1 AT D8 OR CODE 9 AT S15**
- 12 NOT CURRENTLY VULNERABLE – IF SELECT CODE 19 OR 20 AT D9, AND NOT CODE 1 AT D8, AND CODE 2-8 AT S15**

Attitudinal profilers

MC ASK ALL DOMESTIC

A1 Which of the following emotions best describe how you're feeling towards day-to-day life at the moment? Please select all that apply. **RANDOMISE**

- 41. Happy
- 42. Depressed
- 43. Stressed
- 44. Optimistic
- 45. Positive
- 46. Worried
- 47. Energetic
- 48. Tired
- 112. Other (please specify) **ANCHOR**
- 113. Prefer not to say **ANCHOR, EXCLUSIVE**
- 114. Don't know **ANCHOR, EXCLUSIVE**

G

ASK DOMESTIC

A2 DOMESTIC ONLY. NHH GO TO D12: 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

RANDOMISE

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

SC

ASK DOMESTIC

A3 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

S

ASK DOMESTIC

A4

Which of the following best describes your views when thinking about whether water companies should be in private or national ownership?

26. In favour of nationalisation – the water sector becomes owned and run by the UK Government, funded directly through tax-payers
27. Against nationalisation – the water sector should stay owned and run by private water companies and their shareholders, with investments funded through customers' water bills
28. Against nationalisation – but the water sector should be run by not-for-profit water companies, with investments funded through customers' water bills
29. Other
30. Not sure

G ASK ALL

D12 On a scale of 1 to 5, where 5 is very good and 1 is very bad, using the rating scale below please let us know how you would rate each of the following about this study. We will use this feedback to help us make improvements in the future.

RANDOMISE	1 Very Bad	2	3	4	5 Very Good
Length of study					
I understood what I was being asked to comment on					

S ASK IF SSC SAMPLE ONLY, NOT PANEL, DOMESTIC ONLY

D13. Would you like to join <PIPE IN South Staffs Water's if QHIDAREA= SSW or Cambridge Water's if QHIDAREA= CAM> online community, called H2Online. The community allows its customers to take part in activities to help shape its future plans and also hear about how this feedback is being used to improve the service*

3. Yes
4. No

*By ticking 'Yes' you give permission for Impact, who are running this study, to share your e-mail address with <PIPE IN South Staffs Water's if QHIDAREA= SSW or Cambridge Water's if QHIDAREA= CAM> 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.

S ASK ALL

D14 Thank you for taking the time to give your feedback. Please select how you would like to receive your £5 thank you. Please note if you select a Love2Shop gift voucher, you will need to supply your email address, so it can be sent to you.

10. Love2Shop gift voucher – accepted at over 20,000 retailer outlets
11. Donation to Water Aid – a charity who works globally to ensure more people have access to clean water every day
12. Donation to The Trussell Trust – who run a nationwide network of food banks

O ASK ALL

D14a Please provide your email address so the voucher can be emailed to you.

IF RESPONDENTS CLOSES, SHOW FOLLOWING TEXT

Thanks for taking part. Unfortunately your answers so far mean we can't continue with the study.

END TEXT

Thanks for taking part.

Cognitive interviews summary

Project background

For PR24, Ofwat has outlined two assessment gateways to assess whether or not a water company can be granted Company Specific Adjustment, one of which is focussed around customer support. With this in mind, South Staffs Water PLC (SSC) has commissioned Impact to conduct a research study, to understand customers' appetite to support and pay for a small Company Specific Adjustment (CSA) charge to be added to their clean water bill.

Initially, a qualitative stage was completed, to gain an initial understanding on acceptance levels, which will be followed by a robust piece of quantitative research, with customers across SSC's two supply regions – South Staffs and Cambridge. Prior to launching the quantitative survey, a cognitive pilot was conducted, and this report summarises the findings from the 10 cognitive interviews that were completed. This step is an important part of the process of using that the research meets Ofwat's expectations for being high-quality.

Objectives

The pilot had three objectives:

- Test customers' understanding of the survey
- Ensure participants' response align with the intentions of running the survey
- Gather feedback from customers relating to the survey experience.

Method

A total of 10 cognitive interviews were held online on Microsoft Teams, with household and non-household customers participating across SSC's two regions; South Staffs and Cambridge. The interviews were held from Monday 20th March to Wednesday 22nd March 2023.

Each interview was led by a member of the Impact team, whose role was to introduce the survey to customers, and the reason why this research was being completed. They were also responsible for identifying any problems with the survey and gaining any additional feedback from customers concerning their answers, and opinions on the survey's length and content.

Impact developed the survey with input and final sign-off from SSC. This followed the Market Research Society (MRS) guidelines for questionnaire writing, and questions will be asked in a way that does not bias, or influence the way respondents would answer.

Sample

Out of the 10 customers who took part in the cognitive interviews, six were from the South Staffs region, and four were from Cambridge. Eight participants were household customers, with the remaining two being non-household customers. Of the household customers:

- Three were male and five were female
- Age ranged from 31 to 76
- Three were social grade ABC1 and five were C2DE
- Three participants were Asian/Asian British, one was mixed race, and four were White British
- Four lived in urban areas, three lived in semi-rural areas, and one lived in a rural area
- Two participants had water meters
- Two participants were classified as customers with vulnerabilities

Of the 10 interviews, seven were completed on their laptop/computer and three completed the survey via their mobile phones. The interviews ranged from lasting 30 minutes, to over an hour.

Results

Summary

The average time to complete the survey was 26 minutes. Retention of the survey material was high, with participants remembering most key pieces of information when questioned after completing the survey, giving us confidence that participants did not skip through the survey without reading the materials.

Key findings

All participants understood what was being asked of them throughout the survey, with no issues with comprehension. Most participants found the extra CSA charge to be acceptable, although some found it to be unfair, or didn't agree that this charge should be passed on to the customer. Almost all participants stated that they would rather pay for the CSA rather than switch to a larger water company. Most customers were happy with their current supplier, and therefore, the charge was seen as "not enough to be worth looking into changing" company. One participant did, however, state that they would rather switch to a larger company, as they felt that this would better maintain current costs.

Most participants found the information to be interesting and easy to read. Some noted that it was good to see statistics and comparisons with other water companies and that their company was doing "better than the national average". Others found it interesting to learn about community initiatives, as well as how the CSA works, with many having no idea that either of the schemes existed. The use of graphs to complement the text was greatly appreciated and further aided comprehension of the information. Participants in general had no issues calculating their bills, with almost all participants managing to either check a previous statement or estimate their average water bill.

Issues identified

The most frequent issue that was noted by customers related to the text and graphs. While many customers stated that they found the text to be of an acceptable length, and the graphs made the content easier to comprehend, other customers stated that the graphs were relatively small and busy, making reading difficult. Three participants cited that there was too much text, making it "intimidating to someone with literacy difficulties", and suggested that this could be condensed more. Two participants noted an instance where the text was unclear or could be misunderstood.

Conclusions and actions taken

Given the feedback overall, no major changes to the survey were needed. A range of wording and phrasing tweaks were made, however, which are laid out below:

- Added 'other' answer code to S8b
- Bold 'overall service' in Q2 question text
- Bold 'value for money' in Q3 question text
- Change '10 millions' to 'tens of millions' in intro text before Q10
- Updated scale in line with industry standard on D5

Other feedback respondents gave were around reducing the amount of text given, including before and after graphs were shown. After discussions with SSC, it was decided that drastic reductions in text could result in a loss of critical detail that may prevent customers from being able to make an informed decision on their support for the CSA. We did, however, make a number of small tweaks, to try and reduce the time taken, and also updated the graphs to make it more obvious what each were showing, as below.

- Survey introduction text
- Text introducing Ofwat
- Information on funding investments
- Updated showcard G – average length of time without water
- Updated showcard F – combined water quality contacts
- Updated showcard H – leakage levels
- Updated showcard N – average clean water bill

Additional changes made

In addition to the cognitive testing, colleagues from SSC and from the Consumer Council for Water made suggestions to improve the survey flow and comprehension. These were compared to the feedback from the customer cognitive interviews and several changes were made, where they did not conflict with the customer feedback.