IMPACT

FROM INSIGHT TO INFLUENCE

Thematic Analysis Appendices

Appendix tables

Prepared for SSC

Prepared by Impact Research

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Project No. 1345

South Staffs Water

Cambridge Water

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Glossary

Abbreviation	Definition
AMI	Advanced Metering Infrastructure
AMR	Automatic Meter Reading
BAU	Business as Usual
BVP	Best Value Plan
CAM	Cambridge Water supply region
CCW	Consumer Council for Water
CSA	Company Specific Adjustment
CO2	Carbon Dioxide
CVF	Cam Valley Forum
Covid-19/Pandemic	The Covid-19 Pandemic impacts that commenced in March 2020 and are still ongoing.
FBP	Future bill payers (consumer who typically those under 30 who do not directly receive water bills)
DEFRA	Government Department for Environment Food and Rural Affairs
HCT	Hobson's Conduit Trust
HE	Historic England
HH	Household (customers)
LTDS	Long Term Delivery Strategy
MCDA	Multi-Criteria Decision Analysis is a sub-discipline of operations research that explicitly evaluates multiple conflicting criteria in decision making. Cost or price is usually one of the main criteria, and some measure of quality is typically another criterion, easily in conflict with the cost.
MOSL	Market Operator Services Limited
NEUBs	Non-Essential Usage Bans for business customers
Net Zero	Cutting greenhouse gas emissions to as close to zero as possible, with any remaining emissions re-absorbed from the atmosphere, by oceans and forests for instance. Often used as shorthand for the UK Net Zero goals, which is for the UK to achieve Net Zero emissions by 2050.
NFU	National Farmers' Union
NHH	Non-household (customers)
NT	National Trust
ODI	Outcome Delivery Incentive: Ofwat provide financial payments to water companies from customers for water companies performing beyond their committed levels of service ('outperformance payments') or from water companies to customers for performing below their commitments ('underperformance payments').
ONS	Office for National Statistics
PR19/24	Price Review 2019/2024
PSR	Priority Services Register
SGP	South Cambridgeshire Green Party
SH	Stakeholder - an organisation or individual representing a specific cause or area of interest
SME	Small and Medium-sized Enterprises
SRO	Strategic Resource Options
SSC	South Staffs Water (encompassing both supply regions)
SSW	South Staffs Water supply region

TUBs	Temporary Use Bans for household customers
UKWIR	UK Water Industry Research
YWYS	Your Water Your Say
WINEP	Water Industry National Environmental Programme (A programme of actions needed for water companies in order to meet environmental obligations for 2050)
WRAP	Water Resources Advisory Panel
WRE	Water Resources East - water resources regional planning group
WRMP19/WRMP24	Water Resources Management Plan 2019/2024
WRW	Water Resources West - water resources regional planning group
WTP	Willingness to Pay

1. Appendices Introduction

Impact Research was commissioned to work with SSC for the following:

- To deliver a robust triangulation of customers' and stakeholders' priorities that underpins the narrative of SSC's plans:
    - Robustly triangulate evidence relating to WRMP to support all key decisions
    - Support the development of SSC's Performance Commitment (PC) package
    - Triangulate WTP values to set central, upper and lower values.
- To support the development of SSC plans with triangulated valuations and insights to best deliver 'public value'
- Create an insight matrix from SSC's trackers to assist in the delivery of the PR19 plan and guide PR24
- Enable both SSC challenge panels and board to effectively challenge the approach plus independent review by a third-party expert

The main report is one of two resulting from the project, triangulating foundation evidence to inform development of WRMP24 (and subsequently PR24):

1. **Technical triangulation** – the process of drawing together all relevant data sources and combining them within a formal framework that will ultimately produce the value ranges suitable for the MCDA and investment modelling.
2. **Combined thematic insight** – articulating these results and wider inputs that cannot be formally included in the above, to guide SSC in the development of their draft plans. This thematic report summarises the combined thematic insights from a review of almost 150 pieces of evidence comprising market research reports, literature reviews and a broad spectrum of qualitative, quantitative and secondary analytical insights.

This appendices document 'SSC12 PR24 Stakeholder and Customer Segment Analysis' is designed to be used in combination with the Combined thematic insight, or for use in its own right, should the reader wish to drill down into more detail into specific customer sub-groups. It contains a collation of feedback from different customer segments and demographics, highlighting the key differences and similarities between these different customer groups, ordered by the same themes covered in the main body of the thematic review undertaken by Impact as part of the **SSC11 Thematic Analysis** report.

The appendix covers the following customer groups:

- South Staffs Water (SSW) compared to Cambridge (CAM) customers, including any customers reported as living in the water regions served by SSW and CAM respectively
- Household (HH) vs non-household (NHH) customers
- Future customers (non-bill payers under the age of 30 years old. Compared to current customers who pay bills
- Customers in 'vulnerable' situations compared to household customers not in vulnerable situations customers - vulnerability includes but not limited to customers on the Priority Services Register (PSR) the elderly (over 75), those with physical or mental medical conditions, lower-income households.
- Stakeholders compared to customers, including any individual/group/organisation or entity with an interest in SSC.

Each section aims to provide an easy to digest summary of how these subgroups compare with one another, for research projects which have included both types of participants (e.g. both HH and NHH, or both SSW and CAM). The exception to this is the stakeholder compared to customer chapter, which mainly summarises stakeholder views as the sources tended to only focus on stakeholders, but some broader comparisons are drawn between stakeholders and customers from wider research reports.

For access to the data sources referenced in this report please see the supporting document - **SSC11 Thematic Analysis.**

Data collation methodology

Each data source was individually reviewed with a particular focus on conclusions and key findings that related to the topics highlighted above. A total of 140 documents were reviewed for relevant content and included in the final report, including published and unpublished documents from the following organisations:

- SSC (Cambridge, South Staffs and Combined region reports)
- Anglian Water
- Aptumo
- Cambridge County Council
- CCW
- DEFRA
- Hafren Dyfrdwy
- MOSL
- Ofwat
- Office for National Statistics (ONS)
- Severn Trent
- Southern Water
- Sustainability First
- University of East Anglia
- University of York
- UKWIR
- Welsh Water
- Customer research reports relevant to Water Resources East (WRE)
- Customer research reports relevant to Water Resources West (WRW)

An Excel Spreadsheet was created to serve as the key data collation tool. This had one sheet per topic area and common columns to each, comprised of critical information about the data source, including date of data collection, contextual environment, sample size, objectives of study, applicable region and method of data collection.

Each source is covered by one line in the sheet (on every worksheet for which there was evidence relevant to that topic). Any insights relating to the topics above were recorded in the sheet using summary bullet points or similar. Any key sub-group differences were also recorded in order that consistencies or differences over time could easily be identified and customer groups highlighted that might be influencing any changes in perceptions. Once all the literature was reviewed, key insights were summarised for the most part in chronological order, highlighting trends over time and key audiences that need to be considered for each topic. Insights gathered from regions outside of SSC's operating area were summarised towards the end of each subsection in order to differentiate SSC customer views from those outside the region.

These findings, along with information from the main body of the thematic review were then collated into during the construction of the appendix tables. The insights have not in this case been given any particular "weights" in terms of their representativeness in the report e.g. qualitative and quantitative research are presented with equal importance to the reader and respondent expertise on a particular topic has not increased or decreased the validity of any findings presented from that piece of research. The findings have simply been described with any appropriate context for interpretation e.g. the world environment at the time of the data collection or any limitations of the research identified.

This process is highly replicable and can be scrutinised by interested stakeholders as required. This review complies with the best practice framework outlined below to provide a robust and reliable approach to triangulation for this thematic review.

Best practice framework

SSC has committed to the over-arching recommendations of the triangulation framework put forward by CCW's extensive review of PR19 triangulation work[1], the essential features of their recommended best practice for triangulation are as follows:

2021 Grouping	Key activities	How the review has met recommendations
A strategic approach to collecting customer evidence	• Undertaking a phased and iterative approach • Developing a consistent and transparent decision framework • Putting in place assurance of the process • Linking Business as Usual (BAU) insight to strategic goals	• The review has taken place in two distinct phases; data collation and review into a pre-agreed framework, summarising of key insights against SSC objectives. • SSC has reviewed the draft document in line with objectives, and provided supplementary context or evidence where appropriate. These reviews did not compromise the independence of the report. • Some BAU insight has been included, and the review will be amended in 2023 to include more substantial evidence from BAU activities.
Collecting, collating and synthesising customer evidence	• A centralised process within the company • Capturing relevant granular metadata for insight	• Data has been collected from SSC evidence as well as external company publications. Each insight has been recorded in the framework, ready for synthesis into the thematic review document.
Weighting and combining customer evidence	• Transparent approach • Use of a standard approach • A clear approach to demonstrating balanced decisions • Defined decision-making framework	• The framework used allows for full transparency of where the data has been sourced, the themes under which each insight falls and therefore how it has been synthesised into the thematic review. • The insights have not been weighted as such in this review as it has not been deemed necessary to create a quantitative framework for assessing strength of evidence. In most cases evidence does not conflict, however where there are disparities the context, audience and any mitigating factors are outlined to guide the reader in interpretation of the significance of such conflicts.
Validating outputs	• Using multi-factor validation (internal, external and independent review) • Running sensitivity and scenario testing • Making research findings publicly available • Independent review of the triangulation process	• Multi factor validation, sensitivity and scenario testing are not appropriate for a thematic review as these relate to Willingness to Pay studies and therefore have not been included here. • The review will be published and many of the studies sourced as evidence are already in the public domain.
Incorporating validated findings into the decisions	• The key enabler at this final stage is the use of a robust and transparent decision framework	• The framework used for data collation and synthesis are available on request.

A. Subgroup Insights

2. Priorities Appendix

SSW vs CAM – Priorities

The table below summarises SSW and CAM preferences in relation to customer priorities. SSW and CAM customers showed fairly similar priorities, with differences appearing in relation to hard water and affordability (with SSW prioritising these areas), and reliable supply, leakage, protecting water sources, and sustainability (with CAM prioritising these areas). CAM also saw a relative lower priority for tackling water poverty and supply interruption in analysis of their ambitions.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
Impact Customer Priorities Analysis	Impact Customer Priorities Analysis	When ranking SSC priorities, SSW prioritised (figures indicate assigned priority out of 100 split across all priorities): • Reliability of supply (15.7) • Bill affordability (12.0) • Leakage (9.3) • Long-term planning for water supply (7.1) • Financial support (5.9) Top triangulated priority ratings for SSC ambitions among SSW customers were (1-10 scale): • Improving water quality (8.2) • Leakage reduction (6.5) • Tackling water poverty (6.4) • Lead pipe removal (6.3) • Reducing supply interruptions (6.1)	When ranking SSC priorities, CAM prioritised (figures indicate assigned priority out of 100 split across all priorities): • Reliability of supply (17.2) • Leakage (10.9) • Bill affordability (10.1) • Long-term planning for water supply (7.6) • Projecting water Top priority ratings for SSC ambitions among CAM customers were: • Improving water quality (7.8) • Leakage reduction (6.3) • Lead pipe removal (5.9) • Reducing supply interruptions (5.5) • Tackling water poverty (4.8)	The rank order of priorities between regions was similar, with differences being relatively small. SSW ranked water hardness (SSW: 4.3, CAM: 2.5) and affordability (SSW: 12.0, CAM: 10.1) much higher than CAM. While CAM ranked reliable supply (SSW: 15.7, CAM: 17.2), leakage (SSW: 9.3, CAM: 10.9), protecting water sources (SSW: 5.0, CAM: 7.1),and sustainability (SSW:3.0, CAM: 4.0) much higher than SSW. Priorities between the two regions were relatively similar, however, CAM showed a relatively lower priority towards tackling water poverty and reducing supply interruptions, likely due to the lower levels of deprivation in the CAM region as shown by Impact SSC Demographics Report (2023). SSW customers showed a greater urgency in wanting delivery of leakage reduction by 2040, with CAM customers showing greater urgency in tackling water poverty, even though their priority rating of this was lower than SSW customers.

HH vs NHH – Priorities

The table below summarises HH and NHH priorities in relation to priorities. Both HHs and NHHs think that reducing leakage should be a priority, but NHHs seem to value slightly more than HHs.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
Tracking Customer Priorities, Desk Review	Accent and PJM Economics, 2020, Report for SSC PLC	SSW HH customers placed more importance on water quality and affordable bills, whilst CAM HHs placed more importance on reducing leakage and protecting the environment. However, none of the differences are significant in the tracker.	Business customers placed more importance on reducing leakage, followed by broadly similar levels to a wide range of attributes.	Whilst both HHs and NHHs found reducing leakage a priority, it appears that NHHs place even more importance on it, compared to HHs.

Future customers vs current customers – Priorities

The table below summarises future customer preferences in relation to customer priorities. Future customers were only mentioned once in the priorities chapter, but it is clear they prioritise protecting the environment and delivering services through digital platforms. The digital platforms point seems unique to FBPs, but CAM HH customers agree on the environmental point, and also place the environment as a high priority.

Evidence	Actual Report Name	Future Customers' preferences	Comparison with household bill-paying customer base
Tracking Customer Priorities, Desk Review	Accent and PJM Economics, 2020, Report for SSC PLC	Future customers consistently placed more importance on protecting the environment and delivering services through digital platforms.	SSW HH customers placed more importance on water quality and affordable bills, whilst CAM HHs placed more importance on reducing leakage and protecting the environment, the latter area of focus being in accordance with FBPs.

Vulnerable vs other customers – Priorities

The table below summarises vulnerable customers' preferences in relation to customer priorities. Vulnerable customers, specifically those who are hard-to-reach and those above 60, were more likely to prioritise providing financial and other support to vulnerable customers and leakage reduction, respectively.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
Tracking Customer Priorities, Desk Review	Accent and PJM Economics, 2020, Report for SSC PLC	The desk review found that hard-to-reach customers placed more importance on providing financial and other support to vulnerable customers. Customers aged above 60 years were more likely to choose reducing leakage as one of their top priorities.	In general, helping customers who may need extra support – both financial and other - when needed, and reducing leakage on pipes, were regarded as core priorities overall. Hard-to-reach customers, however, placed more importance on providing financial and other support to vulnerable customers. Customers aged above 60 years were more likely to choose leakage as one of their top priorities.

3. Best value planning and investment priorities Appendix

SSW vs CAM – Best value planning and investment priorities

The table below summarises SSW vs CAM priorities in relation to best value planning and investment priorities. In general, both regions showed a high desire for bill affordability, with CAM customers sometimes additionally showing interest in other investment areas.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	SSW customers overall slightly favoured keeping bills as low as possible for customers above all else.	CAM customers were split between keeping bills low and investing into other areas.	SSW customers were highly focused on keeping bills low, while CAM customers additionally were interested in other investments.
SSC Priorities Research Tracker (2023)	Accent Priorities Research Quantitative Insights – Year 3	SSW customers supported prioritising bill affordability	CAM customers supported prioritising bill affordability, however, this was second to environmental priorities	Support for bill affordability was a slightly higher priority in SSW compared to CAM
SSC ODI Segmentation Analysis 2023	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM economics)	SSW HH customers were willing to accept a compensation level of £291 if they were to experience emergency drought restrictions for 2 months. SSW NHHs stated £7,460 for the same issue. SSW NHH customers were willing to accept £445 as compensation for hosepipe bans lasting 5 months.	CAM HH customers were willing to accept a compensation level of £288 if they were to experience emergency drought restrictions for 2 months. CAM NHHs stated £34,213 for the same issue. CAM NHH customers were willing to accept £2,273 as compensation for hosepipe bans lasting 5 months.	CAM HHs were willing to accept slightly less as compensation for drought restrictions in comparison to SSW HHs. SSW NHHs were willing to except significantly less for disruption both from drought restrictions and hosepipe bans. However, this large difference may partly be due to the small CAM NHH sample size resulting in wide confidence ranges around the estimates (NHH SSW 155 versus NHH CAM 43 customers). CAM customers gave higher WTA values for most of the service issue scenarios when compared with SSW customers.
SSC – LTDS Report (2023) (Turquoise)	Turquoise SSC PR24 LTDS Research	SSW customers favoured keeping bills lower rather than paying more and investing in service improvements.	CAM customers sat in a midpoint between investment in attributes, and keeping customer bills low.	Overall, CAM customers were much more likely than SSW customers to be in favour of investing more. For example, CAM customers

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
	Presentation July 2023			were more likely to want to reduce the amount of leakage if it costs customers more, whilst SSW customers sat more on the other side of scale, towards keeping customers' bills as low as possible.

HH vs NHH – Best value planning and investment priorities

The table below summarises HH and NHH priorities in relation to best value planning and investment priorities. In most cases, HH and NHH customers are aligned in terms of which investments they think should be prioritised.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Customer Priorities Tracker - Qualitative Wave 2 research – May 2022	Priorities Research Qualitative Insights – Year 3 (Accent) – May 2022	Optimism when moving out of pandemic was short lived and was replaced by significant cost of living concerns.	Optimism when moving out of pandemic was short lived and was replaced by significant cost of living concerns.	No differences.
SSC ODI Main Survey Fieldwork 2022	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM Economics)	Sewer flooding had the highest impact of all service issues, and unsurprisingly, longer supply was considered more impactful than shorter interruptions. HH customers in SSW were willing to accept a compensation level of £291 (£288 in CAM) if they were to experience emergency drought restrictions for 2 months. Hosepipe bans came near the bottom of the priority order, with HH customers being willing to accept a compensation amount of £48 (for both SSW and CAM HHs) for having a hosepipe ban for 5 months.	Sewer flooding had the highest impact of all service issues, and unsurprisingly, longer supply was considered more impactful than shorter interruptions. NHH customers in SSW found a level of £7,460 (£34,213 in CAM) to be acceptable if they were to experience emergency drought restrictions for 2 months. Hosepipe bans also came near the bottom of the priority order for NHH customers, with NHHs in SSW being willing to accept a compensation amount of £445, and NHHs in CAM £2,273 for having a hosepipe ban for 5 months.	Sewer flooding had the highest impact for both HHs and NHHs, but there is some indication that the NHH values may be overstated due to methodological reasons, and should be deflated by as much as 70% of the value. In terms of relative importance, the emergency drought restriction attribute came second for both HH and NHH customers, behind unexpected water supply interruption (24h). For both HH and NHH customers, hosepipe bans came near the bottom of the priority order.

Future customers vs current customers – Best value planning and investment priorities

The table below summarises future customer preferences in relation to best value planning and investment priorities. Future billpayers are notably more likely to be tech-savvy and prioritise online access to real-time information through apps and websites. They also seek proactive information to reduce bill costs and overall water usage. Their top priorities include reducing water waste and improving water quality. Environmental concerns play a notable role in their choices as consumers and potential employees. Protecting the environment is their highest-rated priority and a core "hygiene factor." They prefer digital platforms for service delivery and align with other customers on intergenerational fairness and concerns about bill impacts from investments, which is to ensure that all generations pay an equal contribution over time. Many future billpayers have limited interaction with their water provider due to their living situations. They express varying levels of desire for improvements in different service attributes, with a preference for enhancements related to environmental issues and infrastructure such as developing improvements to the hardness of water, lead piping, and prevention of flooding due to burst pipes.

Evidence	Actual Report Name	Future Customers' preferences	Comparison with household bill-paying customer base
SSC PR19 Foundation Research - June 2017	Foundation Research: Qualitative Findings – Full Report (Accent) – June 2017	(8 future bill payers) Future bill payers are tech-savvy and demanding, and online access to real-time information is a hygiene factor for this generation. MyAccount and app access is important. Future bill payers also expect proactive information to help reduce costs. They expect highly effective functionality to manage usage rather than just the existence of technology for access to account and payment.	No differences to note
SSC WRMP Full Report - Oct 2017	WRMP and Long-Term Resilience Customer Engagement Insight – Full Report (Community Research) – September 2017	Spontaneous priorities for future bill payers: • Reducing waste of water • Cleanliness/ quality of water There were also some mentions of: • Environment • Pollution • Customer interactions • Affordability / cost	No differences to note
SSC Appendix A07 - PR19 data triangulation study - SSW WRMP	PR19 data triangulation study - SSW WRMP	Views in relation to the environment – Although there was a noticeably higher WTP valuation given by future bill payers (under 25) for 'protecting wildlife and habitats', they have observed throughout their engagement and wider research that many future bill payers place a higher level of emphasis on a company's environmental credentials. This is both from a customer viewpoint and when selecting which companies they want to work for.	Future bill payers seem more concerned about companies' environmental credentials than other customers.

Evidence	Actual Report Name	Future Customers' preferences	Comparison with household bill-paying customer base
SSC Customer Priorities Desk Research Report - Aug 2020	Tracking Customer Priorities: Desk Review Report for SSC (Accent) – 8 September 2020	SSC conducted specific research to understand views and priorities of future bill payers regarding services and expectations. It was found that future bill payers prioritised environmental issues, taste and smell and giving customers control of their water services. Highest rated priority for future bill payers is protecting the environment, which should also be considered as a core "hygiene factor". They also placed more importance on delivering services through digital platforms.	Future bill payers prioritised protecting the environment and using digital platforms more than other customers.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	(9 future bill payers) Future bill payers are no different from other customers in their views about intergenerational fairness. Future bill payers, like current customers, were mindful of and concerned about the potential bill impact from investment.	No differences of note.
SRO Public Value - Draft report - July 2022	SRO Schemes Research: Combined Insights (Accent/PJM) – July 2022	Qualitative – Environmental Across regions, future bill payers have strong engagement with the environment – they take a longer-term view and keen to see environmental additions.	No differences to note
Report on Customer Preferences (CCW and Ofwat)	Water consumers views on proposed common performance commitments for PR24	(3 groups with future bill payers, and 2 depth interviews) Future bill payers had the least knowledge, they rarely interact with their water provider. This makes sense as they often live in situations where they have no responsibility over their water, i.e. live with parents or in student accommodation, and have no visibility of bill.	Future bill payers are less engaged than current customers.
WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	(91 future bill payers) There is appetite for improvement in some, but not all, attributes. Most future bill payers selected improvements in service for four attributes; hard water supply, lead pipes, change of property flooding from a burst pipe, and supporting nature and wildlife. A majority selected deteriorations in service for three attributes; customer service, unplanned short interruptions to	The positive WTP attributes seen for Future bill payers were the same for HH and NHH customers.

Evidence	Actual Report Name	Future Customers' preferences	Comparison with household bill-paying customer base
		water supply, and risk of temporary use ban, including hosepipes. Summary of WTP results – Observed positive customer valuations of incremental charges in service for four attributes; risk of a temporary 'do not drink' notice, water lost to leakage from pipes, chance of property flooding from a burst pipe, and supporting nature and wildlife. But none of these results are statistically significant.	
WRW 2023 updated regional plan customer research	Water Resources Regional Plan Customer Research March 2023 Update (April 2023)	In 2021 and 2022, the environment was a big concern for all audiences, especially future bill payers.	No differences to note

Vulnerable vs other customers – Best value planning and investment priorities

The table below summarises vulnerable customers' priorities in relation to best value planning and investment priorities. In most cases, vulnerable customers were more likely to be concerned with affordability of the service following investment plans and its impact on the bill.

Evidence	Actual Report Name	Vulnerable Customer	Comparison with non-vulnerable customer base
WRW 2022 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Vulnerable HH customers were concerned with affordability, due to the wider economic situation, inflation and the rising cost of fuel, energy and food.	In general, both HH and vulnerable groups were concerned with affordability, due to the wider economic situation, inflation and rising cost of fuel, energy, and food. However, these were more of a concern for vulnerable customers.
SSC Customer Tracking 2022/23 Annual Report	SSC Customer Tracking 2022/23 Annual Report	Customers with certain characteristics, who are more likely to be financially vulnerable, are more likely to consider their bills to be unaffordable. For example, some customers with household incomes of under £23K, with a social grade DE did not think their current bills were affordable. Affordability amongst customers in the lowest household income bracket of under £17,005 per year has fallen significantly from 75% in 2021/22 to 66% in 2022/23. These customers were also significantly more likely than higher income households	Whilst 76% of HH customers found their clean water charges to be affordable in 2022/23, only 66% of HH with incomes of under £23K felt the same.

Evidence	Actual Report Name	Vulnerable Customer	Comparison with non-vulnerable customer base
		to disagree that the charges are affordable this year.	
SSC ODI Main Survey Fieldwork 2022	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM economics)	When given the choice between experiencing service issues such as a hose pipe ban and being compensated versus experiencing no service issues at all, customers with medical, communication or life-stage vulnerabilities were willing to accept (WTA) the service issue with compensation across 18 different water service scenarios.	Non-vulnerable customers are willing to accept service issues if compensated. The compensation values, however, were higher for those with medical, communication or life-stage vulnerabilities. Financially vulnerable customers had considerably lower valuations than the average non-vulnerable customer.

Stakeholders vs customers – Best value planning and investment priorities

The table below summarises some of the key themes relevant to best value planning and investment priorities from the stakeholder consultation undertaken during the WRMP24 planning process. Whilst each stakeholder might have different priorities, as their businesses / organisations focus on different things, most stakeholders are interested in SSC's approach to best value planning. Stakeholders would like more information relating to SSC's approach to best value planning, including a greater understanding of the analysis SSC used to determine was is 'best value'. In comparison, SSC customers are generally less engaged and curious about BVP.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Stakeholders want long term, holistic planning around water resilience, e.g. sustainable abstraction
Cambridge Water_WRMP_Consultation Response_NFU_FINAL	National Farmers' Union of England (NFU) Consultation Response	There is a desire for multi-sector collaborative work to enhance best value planning. This should include the agriculture/horticulture sectors, landowners and land managers to realise and maximise potential opportunities e.g., those listed under the WINEP options. The WRMP states the best value planning approach looks to "*assess all of our options against a range of metrics such as biodiversity, flood risk and flood risk mitigation, tourist, leisure and amenity value, and carbon cost (among others). By looking at this wide range of metrics, we can make sure we deliver a plan that delivers best value for our customers and for the environment*". Food production could be included as a best value measure alongside the indicators already reviewed.
MOSL's Response to South Staffordshire Water's Draft WRMP	Market Operator Service Limited (MOSL) Response to WRMP	Despite Defra's guidance to consider the NHH market in companies 'best value' plans, several WRMPs make minimal reference to the market in the main document.
Official Sensitive_Cambridge Water dWRMP consultation_Ofwat response	Ofwat Cambridge Water Draft WRMP consultation response	The plan lacks sufficient evidence that the range of options given is appropriate given the scale of the challenge. It is important to justify the options selected are the best value. The current plan does not ensure costs estimates are sufficiently robust, efficient, appropriately allocated and well evidenced. CAM Water should provide convincing evidence that the preferred options, across all areas of its plan, represent best value.
WRE draft regional plan feedback Ofwat 29 Mar 2023	Ofwat, WRE draft regional plan	WRE should provide more clarity on what its best value analysis means for the final plan, and how cross-sector best value metrics are treated in associated WRMPs.
WRW response to South Staffs draft WRMP	WRW Response to South Staffs Draft WRMP Consultation	Pleased that SSW has used a best value planning approach to develop its preferred plan, as laid out in the Water Resources Planning Guidelines.
230426 CW WRMP HE response	Historic England Cambridge Water Draft WRMP	Historic England supports the approach to planning that identifies the 'best value' option, whereby decisions are made not on the cost alone, but with consideration of other factors such as benefits to customers, the environment and society. However, there is concern about the lack of reference to the historic environment in the plan.
Official Sensitive_South Staffs Water dWRMP24_Ofwat response letter	Ofwat South Staffs Water draft WRMP	The final plan needs to clearly state its objectives and provide clear line of sight from the best value metrics to the plan objectives

4. Environmental destination Appendix

SSW vs CAM – Environmental destination

The table below summarises SSW and CAM preferences in relation to environmental destination. There was relatively little difference between the environmental views of SSW and CAM customers. CAM customers were slightly stricter in terms of legally binding targets surrounding biodiversity, while SSW customers were slightly more likely to believe that the company is already sustainable.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC H2Online Community Feedback - WRMP	H2Online – South Staffs Water and Cambridge Water: Summary of activities relevant to WRMP engagement (Explain) – November 2019 to March 2022	67% of SSW members said that legally binding biodiversity targets were important. A further 25% indicated that these targets were important but shouldn't be legally binding.	75% of CAM members said that legally binding biodiversity targets were important. A further 15% indicated that these targets were important but shouldn't be legally binding.	CAM customers surveyed were stricter on the importance of legally binding biodiversity targets.
SSC Customer Tracking 2022/23 Annual Report	SSC Customer Tracking 2022/23 Annual Report	45% of SSW HHs agreed that SSC runs an environmentally sustainable business	41% of CAM HHs agreed that SSC runs an environmentally sustainable business	Slightly more SSW HHs believed SSC to be environmentally sustainable
SSC PR24 CSA Research, 2023	SSC Company Specific Adjustment Research – PR24	Awareness of environmental initiatives run by SSW was relatively low, with 5% of customers stating they knew of these.	Awareness of environmental initiatives run by CAM was relatively low, with 2% of customers stating they knew of these.	Awareness of environmental initiatives was higher in SSW, but was still relatively low
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	When asked about the desired level of investment ambition relating to the environment, most SSW participants favoured level 2 '*SSC prioritises some changes to protect and improve the water environment*' (50%), with a smaller proportion favouring level 1 '*The water environment stays as protected as it is now*' (36%)	When asked about the desired level of investment ambition relating to the environment, most CAM participants favoured level 2 '*SSC prioritises some changes to protect and improve the water environment*' (53%), with a lower proportion favouring level 1 '*The water environment stays as protected as it is now*' (29%)	When asked about the desired level of investment ambition relating to the environment, significantly more SSW participants favoured level 1 '*The water environment stays as protected as it is now*' (36%) in comparison to CAM participants (29%). While slightly more CAM participants favoured level 2 '*SSC prioritises some changes to protect and improve the water environment*' (53% compared with SSW 50%), and level 3 '*SSC goes even further working in partnership to protect and improve the vast majority of*

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
				water environments' (18% compared with SSW 14%).
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	When asked how important the environment is to them 20/22 SSW participants stated important (including 6 who stated very important). Over the last 12 months: 10 participants stated they were eating less dairy or red meat, 7 were keeping up to date with the latest environmental news, 5 were actively encouraging friends and family to be more environmentally conscious, 4 had lobbied or signed petitions for pro environmental topics, while 6 had not been involved with any of the listed environmental topics	When asked how important the environment is to them 24/25 CAM participants stated important (including 14 who stated very important). Over the last 12 months: 17 participants stated they were eating less dairy or red meat, 8 were keeping up to date with the latest environmental news, 13 were actively encouraging friends and family to be more environmentally conscious, 9 had lobbied or signed petitions for pro environmental topics, while 3 had not been involved with any of the listed environmental topics	In general while both SSW and CAM were highly environmentally positive, CAM participants showed a greater strength of feeling on this, which translates both into stated importance and claimed pro-environmental behaviours over the last 12 months.

HH vs NHH – Environmental destination

The table below summarises HH and NHH preferences in relation to environmental destination. Although all customers value the environment, it appears that NHHs are more likely to believe that SSC is environmentally focused, and NHHs are more in favour of SSC investing in WINEP ahead of the set targets, than HH customers are.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Customer Tracking Report 2022/23	Customer Tracking Research Report 2022/23	44% of HHs agreed that SSC is environmentally focused and does a good job at helping to protect the environment in the areas it takes water from. The same proportion (44%) stated that they believe SSC runs an environmentally sustainable business.	51% of NHHs agreed that SSC is environmentally focused and does a good job at helping to protect the environment in the areas it takes water from. 43% of NNHs believe that SSC runs an environmentally sustainable business.	Proportionally, more NHHs than HH customers believe that SSC is environmentally focused. Similar amounts of NHH and NHH customers believe that SSC runs an environmentally sustainable business.
SSC PR24 CSA Research, 2023	SSC Company Specific Adjustment Research – PR24	49% of SSW HHs and 44% of CAM HHs were not aware of any of the presented community and environmental initiatives run by SSC. Environmental initiatives scored especially low in terms of awareness, with only 3% of HHs in both regions being aware of the SPRING Environmental Protection Scheme,	35% of SSW NHHs and 48% of CAM NHHs were not aware of any of the presented community and environmental initiatives run by SSC. Environmental initiatives scored especially low in terms of awareness, with only 5% of SSC NHHs	Across both HHs and NHHs, awareness of SSC's environmental initiatives fairly was low.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
		and even less being aware of the PEBBLE biodiversity scheme.	and 2% of CAM NHHs being aware of the SPRING Environmental Protection Scheme, and even less being aware of the PEBBLE biodiversity scheme.	
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	Across the whole sample, 92% supported long-term WINEP investments. 65% would prefer to have this work completed before the 2050 ambition target, and 28% wanted it completed by 2035.	Across the whole sample, 92% supported long-term WINEP investments. 74% of NHHs would prefer to have this work completed before the 2050 deadline, and 42% wanted it to be completed by 2035 (earliest achievable).	Both HHs and NHHs support the WINEP ambition. It appears NHHs are more in favour of WINEP investments being made ahead of the ambition target, than HH customers.

Future customers vs current customers – Environmental destination

The table below summarises future customer preferences in relation to environmental destination. Environmental and pollution concerns are both key spontaneous priorities of future billpayers. They place a higher emphasis on a company's environmental approaches, both as customers and potential employees. Future billpayers have a noticeably higher willingness to pay for protecting wildlife and habitats and are generally more inclined to invest in environmental improvements compared to current customers. However, while they discuss the environment often, they often lack specificity. Future billpayers exhibit significant support for water industry environmental investments, even more so than the average customer, and prefer these goals to be achieved before 2050.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
WRMP Full Report - Oct 2017	WRMP and Long-Term Resilience Customer Engagement Insight – Full Report (Community Research) – September 2017	(Includes 30 future bill payers) Spontaneous priorities for future bill payers included: reducing waste of water, improving cleanliness/quality of water, as well as aiding with the environment, pollution, customer interactions, and affordability/costs.	No differences to note
SSC Appendix E - customer research findings summary - CAM WRMP	Appendix E Customer Research Findings Summary – Cambridge Water – Water Resources Management	(Review of 16 studies, with a heavy focus on including future bill payers) Although sample bases weren't robust, FPBs placed a high emphasis on a company's environmental credentials, both from a customer and employee viewpoint.	Future bill payers gave higher WTP values for protecting wildlife and habitats in comparison with other group.

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SSC Appendix A07 - PR19 data triangulation study - SSW WRMP	PR19 data triangulation study - SSW WRMP	FPBs gave noticeably higher WTP valuation for protecting wildlife and habitats, and cared more about a company's environmental credentials.	No differences to note
CCW Public views of the water environment report	Public views on the water environment July 2021	Almost all FPBs were in favour of investing in all environmental improvements and were likely to prioritise the environment much higher than current customers, likely due to future customers having a larger stake in the environmental consequences of water companies when compared to current customers.	FBPs were in favour of paying for all environmental actions, while other customers were generally in favour of paying for a select few.
SRO Public Value- July 2022	SRO Schemes Research: Combined Insights (Accent) – July 2022	FPBs claimed to have strong engagement with the environment and tended to have a longer-term perspective on it, as well as showing a stronger desire to see environmental additions.	No differences to note
CCW Water Consumer Views, 2022	CCW Water consumer views on proposed common Performance Commitments for PR24	FBPs talked about the environment in discussion but rarely in great specificity.	FBPs tended to have the least knowledge of their water provider in comparison with the younger customers and older age groups, however they knew more about environmental issues than the older bill-paying customers.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	FBP showed a significantly stronger level of support for WINEP investments when compared to the average customer during workshops. They also showed a stronger preference for these goals being completed before 2050 (69%) compared with other customers (65%).	FBP showed stronger support for WINEP investments, however, NHHs showed a stronger preference for goals to be met before the 2050 deadline (74%) compared with FBP (69%).

Vulnerable vs other customers – Environmental destination

The table below summarises vulnerable customers' preferences in relation to environmental destination. Vulnerable, low-income customers prioritised tackling water poverty over reducing leakage, and are less keen on paying more to fund WINEP investment.

Evidence	Actual Report Name	Vulnerable customers	Comparison with non-vulnerable customer base
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	Vulnerable customers, including those on low income assigned more importance to tackling water poverty, than leakage reduction.	Whilst vulnerable customers, including those on low income assigned more importance to tackling water poverty than leakage reduction, non-vulnerable customers believed reducing leaks should be more of a priority. This is partly because non-vulnerable customers think investing in reducing leakage would have positive effects on other targets set by water companies. Although WINEP (a program of actions to be taken by water companies to ensure water environments have a healthy level of water flow by reducing

			human demand for water) was well supported generally, vulnerable/low-income customers were reluctant to pay more for this ambition, even though they cared about the environment.

Stakeholders vs customers - Environmental destination

The table below summarises some of the key themes relevant to environmental destination from the stakeholder consultation undertaken during the WRMP24 planning process. Many stakeholders place high importance on the environment, and are interested in SSC's environmental destination approach. Some are on board with SSC's plans to protect the environment, whilst others want more information on exactly how SSC plans to reach the most ambitious targets. Furthermore, some stakeholders still do not believe SSC is doing enough to combat climate change. This care for the environment comes across strongly for some stakeholders, especially among those with an environmental focus. This is similar to future customers (who also often prioritise the environment), although most customer group place high importance on the environment.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Interest in pushing beyond existing environmental targets, with a specific focus on reducing pollution, improving water quality and avoiding habitat loss. SHs working with customers in debt stressed the need to balance ambition and speed of environmental improvement against what customers can afford, and to consider going more slowly to protect customers from steep increases.
South Staffs and Cambridge Water – Your Water Your Say	SSC Your Water Your Say (YWYS) Transcript FINAL	A few SHs mentioned concerns for chalk streams and SSC's licence to take so much water out of the aquifers. One SH asked about safety of swimming in water, and about SSC water safety measures. and transparency of data. Additionally there were a few questions about pollution and reducing carbon.
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Most concerned with climate change and population growth. Stakeholders agreed with SSC recognising climate change as a current, rather than future threat. Also noted its effect on low income and marginalised communities. Stakeholders that worked with farmers briefly mentioned changes to water abstraction permits and were interested to find out more. Additionally, worried about ambitious/fast environmental improvements having a negative effect on customer affordability.
2023-03-16 WRE response to draft WRMP (Cambridge Water)	WRE response to Cambridge Water's Draft Water Resources Management Plan	SHs support the goal to achieve the most ambitious environmental outcomes. Stated the need to show that environmental improvements promised by the plan are real and significant. Specifically, focused on achieving early targets around sensitive waterbodies such as chalk streams, and river restoration action following the reduction of abstraction.
Cam Water WRMP consultation - Cambridge and SGP response	Cambridge and South Cambridgeshire Green Party – Cambridge Water's Draft plan	Mainly concerned with overall regional water shortage and its impact on both people and nature. Are specifically pleased that Cambridge Water is acknowledging the Environment Agency's assertion that the region is seriously water stressed. However, they think the current plan does not give a sufficiently urgent response to the climate change and biodiversity crises as not enough key information has been gathered yet. Showed concerns for extreme weather fluctuations, especially large variability in rainfall.

		Primary concern is a rapid reduction in abstraction from the chalk aquifer, including by capping abstraction at today's actual levels.
Cambridge Water_WRMP_Consultation Response_NFU_FINAL	NFU Consultation Response	Supports work to safeguard the local environment, specifically around reduction in abstractions and alternative water sources, especially in the agriculture and horticulture sectors.
CW dWRMP24_ Cambridge_SouthCambs	Cambridge City Council and South Cambridgeshire District Council Joint Response to Cambridge Water's Draft WRMP	The Councils support schemes to improve the chalk streams and water courses across the area, subject to the appropriate approvals.
South Staffs Water Representation WRMP24 FINAL	Environment Agency – Representation on South Staffs Water's draft water resources management plan	They recommend SSW to ensure the delivery of environmental destination and water framework directive objectives. They need a detailed breakdown of the company's environmental destination and sustainability reduction scenarios at a license level, clearly detailing and justifying when these are expected in the plan and to use sensitivity testing to consider early delivery to support this justification. It should consider catchment and nature-based solutions, and if they can deliver environmental improvements earlier.
Waterscan - SSW WRMP24 Response	Waterscan - South Staff Water WRMP24 Consultation Response 20022023	Supportive of action against climate change, specifically through net zero and better care towards local ecologies. Places a heavy focus on abstraction, as well as going beyond current mandatory targets which aren't ambitious enough. Encourages water companies to measure, disclose and reduce their carbon emissions and water footprint through the Carbon Disclosure Project.
Environment Agency response to WRW	Environment Agency response to Water Resources West's draft regional plan consultation	Poses that WRW's plan to reduce abstraction pressure over time is "too little too late" posing environmental and water supply risks. Concerned about the practicality of delivering this plan, specifically around timings and minimising environmental deterioration. Wants to move away from unsustainable sources quickly and urges WRW to align with environmental legislation and engage with other sectors.
Cambridge Water WRMP24 Evidence Report	Environment Agency Appendix 1: WRMP evidence report	Major issues identified with the plan where it may result in an unnecessary risk to public water supplier and/ or major risk to the environment. The Environment Agency was highly concerned whether the plan will meet statutory obligations under the Environment Regulation Act 2017 to prevent the risk of deterioration in the status of waterbodies. Worried about the abstraction of water specifically.
Cam Valley Forum (CVF) Response	Cam Valley Forum (CVF) consultation response to Cambridge Water on their draft water resources management plan for 2024	CVF feels that there are still major issues with chalk streams in the CAM region; however, they are relieved that they are seeking new and alternative sources. CVF feels that CAM needs to fully reconsider its draft plan for a genuinely sustainable and more healthy future water environment. CFV would like a larger focus on protecting chalk streams.
SST dWRMP24 Consultation Summary	SST dWRMP24 Consultation Summary	The principal concerns are with the robustness of SSW's environmental destination plan, urging compliance with obligations including species and wetland habitats, a desire for clarity on abstraction reductions and rationale for the chosen planning horizon, as well as adherence to WRMP directions, specifically surrounding greenhouse gas emissions. Waterscan supports carbon neutrality and urges other water companies to follow Anglian Water's lead in capping abstraction licenses for enhanced environmental protection.

		Natural England (NE) advises a Habitat Regulations Assessment (HRA) for assessing operational impacts on species recovery, mitigating extinction risk, addressing greenhouse gas emissions, and supporting nature-based solutions. NE also urges aiming for Enhanced Scenario for biodiversity and considering water needs for nature-based solutions. National Trust (NT) seeks environmentally responsible development, mitigation hierarchy, drought resilience, communication strategy, and engagement with stakeholders. They request consultation on Trust land and engagement on plan affecting their land.
SSW WRMP draft Evidence Report FINAL	Environment Agency, Appendix 1: South Staffs Water WRMP evidence report	High focus on improving SSW's transparency and confidence for appropriate environmental destination. Would like more clarity on the timelines and impacts of environmental destination.
CW_dWRMP_NE_response_letter	Natural England (NE) response to Cambridge Water's draft WRMP	Natural England (NE) considers Cambridge Water's WRMP to have insufficient information to determine impacts on designated sites. Supports the company's aim for the plan to ensure abstraction reductions from existing sources over the next 25 years to counteract the impacts of climate change, to ensure the environment has the water it needs and that Water Framework Directive (WFD) targets are met. The SEA does not adequately consider the effects of the preferred options on natural environment features including Habitats sites, SSSIs, priority habitats, species of principal importance and landscapes.
National Trust (NT) Response South Staffs dWRMP 2023	NT South Staffs WRMP	Supports environmental and spatial planning management that takes a holistic and plan-led approach. This includes planning for the long-term, looking at the landscape or catchment style, and considering the implications for climate change, landscape, heritage and nature. However, has a desire to see an environmentally responsible and sustainable approach to development
HE response on the South Staffs Draft Water Resources Management Plan consultation 22 February 2023	Historic England (HE) South Staffs WRMP	Believes the historic environment should be referenced more in the plan.
EXTERNAL. More detail for our response to Cambridge Water WRMP	Email from Stephen Tomkins from Cam Valley Forum	Priorities mainly lie in reducing abstractions.
NE Response South Staffs dWRMP24 Final	NE Response South Staffs dWRMP24 Final	Highlights a further need for greenhouse gas emissions assessments and reduction strategies in the plan. Highlights peat wetting and nature-based solutions for climate change and biodiversity, as well as maintaining adequate water retention for wildlife adaptation to climate change. Recommends measures to contribute to the 2030 species target and mitigate extinction risks. Notes that measures and considerations to mitigate landscape impact should be detailed and asks for comprehensive detail on landscape protection in the final report.
CVF Response	Cam Valley Forum Response to Cambridge Water's Draft WRMP	Notes that CAM have a long way to go in addressing chalk stream issues in the area.
HCT Letter	Hobson's Conduit Trust (HCT) Letter re draft CWC WRMP 5.23	Notes the environmental impact of abstraction on chalk streams and urges to reduce abstraction. Concerns about the over-reliance on chalk aquifer for public supply. Calls for an earlier date than the proposed 2050 date for reducing abstraction. Calls for greater efforts to raise customer awareness and promote water conservation.

5. Service level resilience to drought Appendix

SSW vs CAM – Service level resilience to drought

The table below summarises SSW and CAM preferences in relation to service level resilience to droughts. There are limited differences between SSW and CAM views on this topic, but it does appear that CAM customers are more likely to raise concerns about water restrictions than SSW.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	In general, SSW had a preference towards TUBs restrictions	In general, CAM had a preference towards TUBs restrictions	There was a slight preference for TUB restrictions in the SSW area when compared to CAM, as CAM customers were more likely to be in favour in principle but had issues with how they would be effectively policed
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	49% of SSW stated that the current level of risk of drought restrictions to be acceptable. Additionally, those on a meter and males in the SSW region were more likely to look for more frequent TUBs than at present	57% of CAM stated that the current level of risk of drought restrictions to be acceptable. There weren't many demographic differences in CAM aside from lower social grades and males being more likely to suggest TUBs should remain as they are now as of 2022	CAM residents were more accepting of current levels of risk of drought restrictions. Additionally, males in the SSW region were more likely to look for more frequent TUBs, while males in the CAM region preferred them to remain the same.
SSC ODI Segmentation Analysis 2023	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM economics)	On average, SSW HHs expected £291.10 in compensation for emergency drought restrictions for 2 months. NHHs expected £7,460.	On average, CAM HHs expected £287.60 in compensation for emergency drought restrictions for 2 months. NHHs expected £34,213.	SSW HHs expected slightly more as compensation for emergency drought restrictions for 2 months. While CAM HHs expected much more, however this may be due to a relatively small CAM NHH sample of 43 customers compared with 155 SSW.

HH vs NHH – Service level resilience to drought

The table below summarises HH vs NHH preferences in relation to service level resilience to droughts. There are limited differences between HH and NHH view on this topic, but it does appear that NHHs are more likely to raise concerns about water restrictions than HHs.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	TUBs were acceptable and justified for most, although there were a slightly higher number of objections to more frequent restrictions in SSW even though the majority were still in favour.	Found that SMEs were more likely to raise concerns about restrictions than other groups, given their experiences over lockdown.	NHHs seem more likely to raise concerns about restrictions than HHs.
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	When informed of the issues around droughts, around half of HH customers supported reducing the risk to 1 in 500 years by 2024.	When informed of the issues around droughts, around half of NHH customers supported reducing the risk to 1 in 500 years by 2024.	No differences.
SSC NERA WTP for water services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	HH customers in both regions were not willing to pay to reduce the percentage chance of temporary use ban in a given year as the model used to calculate returned negative values	NHH customers in both regions were not willing to pay to reduce the percentage chance of temporary use ban in a given year as the model used to calculate returned negative values	No differences. In both cases, the negative values suggest that both HH and NHH customers are willing to accept an increased chance of TUBs if improvements can be made to other service factors.
SSC ODI Main Survey Fieldwork 2022	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM economics)	On average, SSW HH expected £291.10 in compensation for the emergency drought restrictions for 2 months. This was slightly lower for HH CAM customers at £287.60.	For NHHs, there was a big difference between SSW and CAM with CAM NHH customers expecting a compensation of £34,213 whilst NHH SSW customers expected £7,460 compensation. However, this large difference may partly be due to the small CAM NHH sample size resulting in wide confidence ranges around the estimates (NHH SSW 155 versus NHH CAM 43 customers).	HHs and NHHs are willing to accept different amounts, which would be expected due to different levels of impact.

Future customers vs current customers – Service level resilience to drought

The table below summarises future customer preferences in relation to Service Level Resilience to Droughts. Future billpayers have high expectations for service levels. Despite increasing awareness of climate change and its association with rising temperatures, respondents, including future billpayers, rarely mention drought risks or the potential for running out of water. There is some variation in how respondents, including FBPs, perceive the risk of a 1 in 200 chance of drought restrictions. However, they generally consider emergency measures to have a low impact and occur with a low frequency. They believe they would rise to the challenge if such restrictions were imposed. When future customers are presented with the challenges faced by SSC in the future, they express particular concern about droughts. They anticipate the need to reduce their water consumption and be more mindful of usage, along with fears of higher water bills due to prolonged droughts and water scarcity in the future.

Evidence	Actual Report Name	Future customers	Comparison with household bill-paying customer base
SSC PR19 Foundation Research - Full Report - June 2017	Foundation Report – Qualitative Findings: Full Report (Accent) – June 2017	(Caution: Future customer sample size of 8 is low. Findings should therefore be treated as indicative only) FBPs demand high service levels and a proactive approach, through the adoption of technology beyond using technology to just provide access to accounts and payment. They also expect real-time information on usage and communication of changes to service levels.	FPBs were found to be more waste oblivious when compared to pre-family HH customers and metered customers. They also often used bottled water for convenience and had a sense of water being an easily renewable source.
WRE: Club Customer Engagement report	WRE: Club Customer Engagement Final Report: Combined (Blue Marble) – September 2021	(Caution: Future customer sample size of 4 is low with only 1 from CAM and 3 from other water companies. Findings should therefore be treated as indicative only) Despite climate change weighing increasingly heavily on respondent's consciousness and associating climate change with rising temperatures, drought risks are rarely mentioned spontaneously and nor is the risk of running out of water. This illustrates that droughts are not something people expect in the UK as they expect water companies to collect stormwater and manage surplus to mitigate against shortages. There was variation in how respondents, including FBPs felt about whether a 1 in 200 chance of drought restrictions was high risk or not. However, emergency measures were generally regarded as a low impact and medium to low frequency and they felt that if restrictions did happen, they would rise to the challenge.	Compared to HH customers and future customers/non-bill payers, within the NHH sample, farmers are aware of the drought risk. FBPs, like other billpayers, endorsed the reduction of the use of drought measures from 1 in 200 to 1 in 500 by 2039. However, there was also doubt over how this would be achieved considering climate change and felt the actual probability largely meaningless and treated as a 'technical' measure for a risk that does not generally keep people awake at night.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	88 Future bill payers When future customers were shown the big challenges faced by SSC in the future, they were particularly concerned about droughts in the future. They felt it was likely they would have to reduce their water consumption and be more mindful of how much they used and feared they will need to pay higher water bills in the future because of longer periods of droughts and water scarcity.	No differences of note.

Vulnerable vs other customers – Service level resilience to drought

The table below summarises vulnerable customers' preferences in relation to Service level Resilience to Droughts. Vulnerable customers are less willing to accept lower service and expected to be compensated more than non-vulnerable customers for any disruptions.

Evidence	Actual Report Name	Vulnerable customers	Comparison with non-vulnerable customer base
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	Those on the PSR considered Level 1 (information) & 2 Temporary use Bans (TUBs) restrictions to be acceptable and justified.	Compared to non-vulnerable customers, those on the PSR were less willing to accept lower service and were more likely to voice issues and concerns about restrictions because of the impact on them personally.
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	53% of customers on the PSR supported the target of reducing the need for rota cuts and for standpipes to be used to no more than once in every 500 years on average by 2040.	Non-PSR customers were significantly more likely (69%) to support the target for reducing the need for rota cuts and standpipes being used no more than once in every 500 years on average by 2040, compared to PSR customers (53%).
SC ODI Main Survey Fieldwork 2022	Outcome Delivery Incentive research: Main Survey Fieldwork (Accent and PJM economics)	Those who were medically vulnerable expected £410 compensation for an emergency drought restriction of 2 months compared to those with communication vulnerabilities (£493.40) and those with life-stage vulnerabilities (£379.60). However, those who were financially vulnerable expected £68.90, a considerably lower level of compensation.	On average, customers in vulnerable circumstances (e.g., due to medical reasons, life-stage, or communications, but not financially vulnerable) expected a higher level of compensation for emergency drought restrictions for 2 months than the £291.9 expected by non-vulnerable HH customers.

Stakeholders vs customers - Service level resilience to drought

The table below summarises some of the key themes relevant to service level resilience to droughts from the stakeholder consultation undertaken during the WRMP24 planning process. Whilst a few stakeholders support SSC's drought resilience targets, most want more information about how these drought measures and the timings have been calculated. Multiple stakeholders mentioned the need to reevaluate the likelihood of droughts, based on the hot recent summers experienced in England. Stakeholders are more engaged on this topic than SSC customers, and are in pursuit of more information.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research	Majority of stakeholders support bringing forward standards to 1 in 500-years by 2025 from 2050.

Evidence	Actual Report Name	Stakeholder views
	(Shed Research Consulting) – April 2023	
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Stakeholders perceived climate change as an urgent threat although not all had made the connection with drought/ water supply.
south-staffs-statement-of-response-v2drought plan 2021	South Staffs Water draft drought plan – statement of response	Consumer Council for Water said there was little evidence in the summary or other documents about the extent to which the company has engaged with customers on its strategy for managing a drought – SSCs response says this was being investigated and research was carried out after this review. CCW also asked for more explanations of TUBs, NEUBs, etc, which SSC took on board.
CWRMP24_ Cambridge_SouthCambs	Cambridge City Council and South Cambridgeshire District Council Joint Response to Cambridge Water's Draft WRMP	The councils were unclear what the plan means about drought measures in practice, and how frequent the TUBs and NEUBs would be. Also, no detail on how long these restrictions would last, and whether they would no longer be needed once other sources of supply became operational. The plan should be clearer and more specific on this. The councils strongly urge the introduction of drought measures, such as TUBs, to stop non-essential use and strongly object to deferring the reductions to abstractions licenses and continuing to abstract at levels that would cause damage to the chalk streams and the wider environment.
South Staffs Water Representation WRMP24 FINAL	Environment Agency – Representation on South Staffs Water's draft water resources management plan	SSW should consider what lessons it can learn from the droughts in 2018 and 2022 and how it can improve security of supply for customers whilst protecting the environment.
WRE draft regional plan feedback Ofwat 29 Mar 2023	Ofwat, WRE draft regional plan	Most regional groups have chosen 2039-40 as the regulatory target for achieving the 1 in 500-year level of drought resilience without sufficient testing or explanation. They expect regional groups to explore fully the trade-offs around different pathways to 1 in 500-year drought resilience at a regional scale and to identify and present costs and benefits of varying the timings of the final plans.
South Staffs and Cambridge Water – Your Water Your Say	SSC Your Water Your Say (YWYS) Transcript FINAL – 14th June	A stakeholder questioned whether there should be an update to CAM water drought plan of 2022 which stated that CAM water will not introduce the hosepipe ban on average more than once in 20 years following the Environmental Agency categorising CAM as being in drought for 9 months and 10 days, and droughts seem to be increasingly frequent.
Cambridge Water WRMP24 Evidence Report	Environment Agency Appendix 1: WRMP evidence report	The Environment Agency lacks confidence that proposed drought measures will effectively meet demand and manage the risk of environment deterioration occurring. The Environment Agency believes the company will need to apply its level of service drought measures more frequently and that this could affect its current levels of service.
NT response South Staffs dWRMP 2023	National Trust South Staffs WRMP – February 2023	The National Trust expects that the final plan will incorporate the development of strategic/regional level drought resilience measures in parallel with the new infrastructure programme.

Evidence	Actual Report Name	Stakeholder views
EXTERNAL More detail for our response to Cambridge Water WRMP	Email from Stephen Tomkins from Cam Valley Forum – 17th March 2023	They are not at all convinced that users (the public) will really restrain their use in a drought without more restraint actions from CAM water, like implementing TUBS, which Cam Valley Forum are keen to see happen for that educational reason alone.
CVF Response	Cam Valley Forum Response to Cambridge Water's Draft WRMP – May 2023	Cam Valley Forum is not convinced CAM Water is being realistic with prevention of droughts as there are natural variances and factors that are going to bring greater droughts. Consequently, Cam Valley Forum feel the numbers such as "1 in 500-year" and "1 in 200year" to be hollow.

6. Balancing supply and demand side options Appendix

SSW vs CAM – Balancing supply and demand side options

The table below summarises SSW and CAM preferences in relation to balancing supply and demand side options. SSW and CAM customers preferred slightly different supply and demand preferences, both however had reducing leakage as their number one priority.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC WRMP MCDA Quant insights 2022	SSC WRMP: MCDA – Quantitative Insights (Accent) – July 2021	Top supply and demand preferences were: • Reduced leakage • Reduced usage through education • Recycling at home/businesses	Top supply and demand preferences were: • Reduced leakage • Reducing use through metering • Building a regional reservoir	Preferences on top supply and demand options change per region. CAM customers also had higher valuations for most investment areas on average compared with SSW customers.
South Staffs Water Stakeholder Roundtable feedback summary (October 2021) **Cambridge Water Stakeholder Roundtable feedback summary (October 2021)**	Stakeholder Roundtable Feedback – South Staffs Water (Community Research) – October 2021 Stakeholder Roundtable Feedback – Cambridge Water (Community Research) – October 2021	Stakeholders from environmental organisations prioritised demand over supply so as to minimise negative environmental impacts associated with supply-side measures. Other stakeholders did not have strong views on this topic and felt that SSW should use whichever option was best in terms of cost-benefits.	Stakeholders showed a strong support for demand management implemented quickly, such as increased ambition on per capita consumption and introducing universal metering, as well as more regular use restrictions. No preference in general on how to balance demand and supply investment, however some preferred demand management due to environmental impacts.	Stakeholders in both regions preferred demand side management, mainly due to environmental reasons, however, this was much stronger in SSW. CAM stakeholders were interested in the implementation of universal metering, more use restrictions, and increased per capita consumption, while SSW stakeholders did not show a strong impact.

HH vs NHH – Balancing supply and demand side options

The table below summarises HH vs NHH preferences in relation to balancing supply and demand side options. No differences are seen between the two customer types, as demand side options, especially reducing leakage, are universally favoured.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC WRMP MCDA Quant Insights 2022	SSC WRMP: MCDA – Quantitative Insights (Accent) – July 2021	Out of a list of supply and demand options, displayed with their relative costs and environmental impacts, the top priority for HHs was reducing leakage.	The NHH top priority was also reducing leakage.	No differences. The order of importance was the same for both HHs and NHHs, with 'reduce leakage by 50% by 2050' first, followed by 'reduce water use through education and advice', followed by 'recycle or re-use waste water indirectly'. Demand side options come before supply side, for both customer groups.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
WRW 2023 Updated Regional Plan Customer Research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	SSC HH customers favoured demand options, with reducing leakage as the top priority, in line with most other water companies in 2022.	NHH customers also favoured demand options, with reducing leakage as the most favoured, in line with most other water companies.	No differences. Both HHs and NHHs prioritised demand options, with reducing leakage as the main priority.

Future customers vs current customers – Balancing supply and demand side options

The table below summarises future customer preferences in relation to balancing supply and demand side options. Future billpayers preferences tend to focus more on demand side options in comparison to supply side. Metering holds relatively low interest. However, due to its use as a long-term solution to save money, it is favoured relatively highly in comparison to other supply and demand options. In addition to metering, leakage reduction is a highly sort after demand side option. In relation to supply side options, desalination is popular, however, future billpayers worry about the environmental impact of this. Future billpayers anticipate the need to reduce their water consumption and be more mindful of usage, along with the possibility of higher water bills due to prolonged droughts and water scarcity in the future.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
SSC Appendix E - customer research findings summary - CAM WRMP	Appendix E Customer Research Findings Summary – Cambridge Water – Water Resources Management Plan: Appendices	(Caution: Future customer sample size in the triangulation of 16 pieces of research is unclear. Findings should therefore be treated as indicative only) Leakage was put in the top priority bucket for investment by both FBP and HH with higher socioeconomic status when asked to consider 17 attributes.	FBPs were more positive about smart metering.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	(Caution: Future customer sample size of 9 is low. Findings should therefore be treated as indicative only) Focusing more on the demand side, FBPs from CAM wanted greater transparency about water use and how to preserve more. When asked about priorities and principles, a FBP from CAM said they have tried to balance looking after the environment and planning as they feel although keeping customers' bills low is tempting and important, it will be of little use when water shortages are faced in the future due to overuse or other environmental issues. Most customers, including FBPs, felt using a mix of options such as education in conjunction with interventionist measures such as metering would be the best way to reduce demand. Many also felt leakage target (reduce leakage by 50% by 2050) will consist of many factors but essentially felt like a reasonable achievement.	Compared to current billpayers, FBPs very strongly favour higher tariffs for higher use. Additionally, FBPs were also more likely to feel that reduced per capita consumption targets of 110 litres per capita per day were achievable by 2050.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
		Some future bill payers even voiced they would like a leakage reduction of 50% to be achieved sooner.	
WRE: Club Customer Engagement report	WRE: Club Customer Engagement Final Report: Combined (Blue Marble) – September 2021	(Caution: Future customer/ non-bill payers sample size of 4 is low, with only 1 from CAM and the rest from other water companies. Findings should therefore be treated as indicative only) Desalination as one of the supply options was seen as an appealing option for many, however non-bill payers also felt that if it would harm the environment, it is not worth looking into it as it would make things worse in the long run. Customers, including non-bill payers, did not like the idea of any solutions that could destroy or damage natural habitats or wildlife, as it sounds like sewage is being pumped into natural habitats. Customers, including non-bill payers, also felt a joint effort between customers and water companies is necessary to act and make a change, but responsibility is seen to primarily lie with the water companies.	No differences of note.
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	(Caution: Future customer sample size in the triangulation of 120 pieces of research is unclear. Findings should therefore be treated as indicative only) FBPs and shared bill payers had low interest in metering compared to those in more affluent households as they preferred being able to predict their bill for the ease of splitting. However, when fully evaluating all supply and demand options, metering comes out on top. This is mainly because it is a long-term solution, saves money, is environmentally friendly and encourages personal responsibility.	No differences of note.

Vulnerable vs other customers – Balancing supply and demand side options

The table below summarises vulnerable customers' preferences in relation to balancing supply and demand side options. Vulnerable customers seem to lack confidence in reduced consumption targets being met.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	In a deliberative focus group, some PSR customers felt that reduced daily consumption targets (per capita consumption) were not realistic, potentially because of their greater water use.	Customers on the PSR were less likely to feel that reduced consumption targets were realistic compared to non-vulnerable customers.

Stakeholders vs customers - Balancing supply and demand side options

The table below summarises some of the key themes relevant to balancing supply and demand side options from the stakeholder consultation undertaken during the WRMP24 planning process. Multiple stakeholders are concerned that SSC has not provided enough evidence to explain any significant changes to the supply demand balance. Also, multiple stakeholders are concerned that supply is dwindling and that SSC might not be able to deliver the demand measures they have proposed in their plans. Here, stakeholders have a much more niche view than SSC customers, as most customers did not pick up on the fact that SSC might fail to deliver in accordance with future supply and demand expectations.

Evidence	Actual Report Name	Stakeholder views
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Affordability and environmental impact were seen as the most important criteria for choosing between options.
CW dWRMP24_ Cambridge_SouthCambs	Cambridge City Council and South Cambridgeshire District Council Joint Response to Cambridge Water's Draft WRMP	The councils urge CAM water, along with the Environment Agency, DEFRA, DLUHC and OFWAT to work effectively together and in a timely manner to resolve the final WRMP and to bring forward the necessary supply and demand measures as rapidly as possible in such a way that there is no environmental deterioration, and that past ecological damage has an opportunity for repair.
Official Sensitive_Cambridge Water dWRMP consultation_Ofwat response	Ofwat Cambridge Water Draft WRMP consultation response – May 2023	The plan does not provide enough evidence that explains any significant changes to the supply demand balance fully and robustly.
Environment Agency response to WRW	Environment Agency response to Water Resources West's draft regional plan consultation – February 2023	Stakeholders believe unrealistic assumptions are being made about the capacity of water supply assets for SSW. Specifically, capacity is greatly over estimated and there is a risk that supplies are not as reliable in times of high demand as the plan suggests. Greater reassurance is needed that public water supply demand reductions will be achieved, as the plan is currently heavily reliant on reduction of demand but does not adapt to the success of these in the short term.

Evidence	Actual Report Name	Stakeholder views
Cambridge Water representation dWRMP24	Environment Agency – Representation on Cambridge Water's draft water resources management plan - March 2023	Stakeholders are very concerned that CAM Water will not be able to meet the demand for water in the area without increasing risk of deterioration in status of water bodies.
CCW response to the SSC draft WRMP - February 2023	CCW response to South Staffs Draft WRMP 2024 – May 2023	CCW is aware it may be challenging for South Staffs to be able to deliver all the demand side solutions and ensure a resilient water supply in 2050 without additional supply side input.
CCW response to the Cambridge Water draft WRMP - May 2023	CCW response to Cambridge Water Draft WRMP 2024 – May 2023	CCW believes the plan's strong focus on Demand Management solutions reflects the clear message from customer research / engagement that, to be acceptable, the plan must make the best possible use of the current water resources before investing in any large-scale supply side options. Much depends on reducing leakage and PCC, supported by universal metering.
CW_dWRMP_NE_response_letter	Natural England response to Cambridge Water's draft WRMP – May 2023	Natural England emphasises the need to ensure that demand and supply options within the plan are deliverable, so that abstraction reductions can proceed. At present, the WRMP does not demonstrate a clear mechanism to ensure that the demand options proposed will be successful.
Official Sensitive_South Staffs Water dWRMP24_Ofwat response letter	Ofwat South Staffs Water draft WRMP - February 2023	The stakeholder believes the final plan should quantify and justify the reasoning for changes in water needs between the end point of WRMP19 and start of WRMP24, and that PR19 schemes are being delivered as planned and accounted for in the supply-demand balance. The final plan also needs to consider a wide range of supply and demand options; there are only 17 in the plan and other companies have detailed far more.
CVF Response	Cam Valley Forum Response to Cambridge Water's Draft WRMP – May 2023	Cam Valley Forum believes the aquifer alone is an unsustainable resource for the great bulk of water supplies. Behind the "show of consultation", and through the "fog of water industry jargon" there is encouraging evidence of better management by Cambridge Water seeking new and alternative sources, new investment, fixing leakage, saving water and changing approaches. Unfortunately, climate change, past erosion of Natural Capital, a fast-growing population and great pressure for development all militate against a successful company plan being possible.
Cambridge Water WRMP24 Evidence Report	Environment Agency Appendix 1: WRMP evidence report	The Environment Agency did not have confidence that the draft plan effectively demonstrated the delivery of demand management, drought measures and supply options and felt the plan had no credible alternative solutions.

7. Demand side options Appendix

SSW vs CAM – Demand side options

The table below summarises SSW and CAM preferences in relation to demand-side options. All customers were concerned for leakage, and this was a top priority consistently throughout the literature. CAM customers tended to prioritise this higher than SSW customers, and were willing to pay much more for it. Differences in recycled water preference changed depending on the source of water by region.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
Customer Priorities Tracker 2023	Priorities Household Tracker Year 3 Quantitative Insights	All customers saw leakage as a high priority.	All customers saw leakage as a high priority. This was particularly high in the CAM region.	Leakage was a high priority for all customers, CAM customers however ranked this as a higher priority than SSW customers.
Explain Net Zero Citizen Jury	Explain's South Staffs Water and Cambridge Water Net Zero Citizen Jury	Leakage was seen as a top priority by SSW participants.	Leakage was seen as a top priority by CAM participants.	Both SSW and CAM groups saw leakage as a high-priority target. While both groups saw renewable energy generation as a medium/high priority
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	Reducing leakage produced the second higher WTP values in this region after reducing risk of temporary do not drink notices.	Reducing leakage produced the higher WTP values in this region.	CAM customers showed higher WTP values for leakage (£1.40 per unit per household) when compared with SSW customers (£0.61 per unit per household)
H2Online – Smart Villages	H2Online – Smart Villages Activity feedback, SSC Monthly report August 2022	42% of SSW voters stated that they would not be willing to pay a small bill increase to fund smart villages, compared with 9% who would be.	44% of CAM voters stated that they would not be willing to pay a small bill increase to fund smart villages, compared with 21% who would be.	Neither region wanted to pay to fund smart villages, however CAM customers were more willing.
H2Online community WRMP24 Acceptability and Affordability testing study	H2Online – South Staffs Water and Cambridge Water, Water Resources Management Plan 2024, Acceptability and affordability testing study September 2022	48% stated that they believe that water companies such as SSC should support the teaching of children about issues of water efficiency, and 33% stated that it was SSC's full responsibility to lead on this with support from teachers and parents.	61% stated that they believe that water companies such as SSC should support the teaching of children about issues of water efficiency, and 28% stated that it was SSC's full responsibility to lead on this with support from teachers and parents.	A higher number of CAM community members believed that SSC should play a role in educating children about water efficiency, however, more SSW members believed that SSC should take a central role on this.
SSC H2Online Community Feedback - WRMP	H2Online – South Staffs Water and Cambridge Water: Summary of activities relevant to WRMP	67% of SSW customers believed that water recycling should be done in all homes. 91% of SSW customers were happy to use recycled water for flushing the toilet and 73% in their gardens.	64% of CAM customers believed that water recycling should be done in all homes. All CAM customers were happy to use recycled water for flushing the toilet and in their gardens.	Note: this study contained a relatively small sample size. SSW customers were slightly more willing to state that recycled water should be used in all homes, but were less likely than CAM customers to be happy about

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
	engagement (Explain) – November 2019 to March 2022	68% of SSW customers had no concerns about using recycled surface rainwater in their homes.	82% of CAM customers had no concerns about using recycled surface rainwater in their homes.	using it in their toilets and gardens. CAM customers were also more willing to use recycled rainwater, however, all customers were concerned about recycled grey or black water.
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	44% of SSW customers supported the introduction of universal metering	59% of CAM customers supported the introduction of universal metering	A higher proportion of CAM customers supported universal metering
SSC H2Online Community Feedback - WRMP	H2Online – South Staffs Water and Cambridge Water: Summary of activities relevant to WRMP engagement (Explain) – November 2019 to March 2022	2020: 32% of SSW customers supported universal metering, while 43% stated that customers should have a choice 2021: 26% thought metering should be universal.	2020: 52% of CAM customers supported universal metering, while 18% stated that customers should have a choice. 2021: 57% thought metering should be universal.	Note that this study had small sample sizes. CAM customers tended to be much more supportive of universal metering, which increased from 2020 to 2021. In contrast, support for universal metering decreased between 2020 and 2021 in the SSW sample.
SSC WRAP Deep Dives Report	South Staffs and Cambridge Water: Findings from the WRAP (Water Resources Advisory Panel) DEEP DIVES on universal metering and water transfers (Community Research) – November 2021	See comparison column	See comparison column	CAM customers were more likely to prioritise full advanced metering infrastructure in comparison to SSW. CAM customers were also more determined to hold out against any bill increases when compared with SSW.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	Universal metering was picked as a top three priority by 3 out of 4 future customers however this was much less popular with current customers.	Universal metering was picked as a top three priority by 4 out of 5 future customers however was much less popular with current customers.	Universal metering was popular in future billpayers across both regions but not current customers.

HH vs NHH – Demand side options

The table below summarises HH vs NHH preferences in relation to demand-side options. In regards to leakage, there are no differences between the customer types, as both HHs and NHHs view reducing leakage as a top priority. In terms of reducing water consumption, it appears that NHHs, overall, are perhaps more engaged in this conversation than HHs are.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Priorities Tracker – Quantitative Year 3 Research – May 2023	Priorities Household Tracker: Year 3 Quantitative Insights (Accent) – May 2023	Leakage remained a priority for HH customers. In a Max Diff exercise with a list of attributes, leakage reduction came third out of all factors.	Leakage also remained a priority for NHH customers. In a Max Diff exercise with a list of attributes, leakage reduction came third out of all factors.	No differences.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	Leakage reduction is a top tier priority amongst all customer segments, and came out as 2nd highest priority. 76% want this ambition to be achieved in advance of the national 2050 target which SSC is targeting to deliver. Most wanted SSC to invest in greater leakage reduction now rather than wait for new technology. In terms of reducing water consumption, 52% wanted SSC to achieve this ambition before the target date of 2050.	Leakage reduction is a top tier priority amongst all customer segments, and came out as 2nd highest priority. 78% want this ambition to be achieved in advance of the national 2050 target which SSC is targeting to deliver. Most wanted SSC to invest in greater leakage reduction now rather than wait for new technology. 69% of the NHH sample were in favour of SSC achieving the reducing water consumption ambitions before 2050.	No differences in terms of leakage. NHHs were more in favour of achieving the reducing water consumption ambitions ahead of ambition targets, compared to HH customers.
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	There are widespread calls to increase leak reduction targets, and this continues to be an emotive topic and top priority for HH customers.	Increasing leak reduction targets also is an emotive topic and top priority for NHH customers. Most NHHs, apart from the highest consumers, are complacent about their water usage. That being said, NHH customers find the idea of water usage audits / reviews very attractive.	No differences in regards to leakage. NHH customers seem to be in favour of water usage audits / reviews, but this was not explored amongst HH customers.

Future customers vs current customers – Demand side options

The table below summarises future customer preferences in relation to demand-side options. Future billpayers are characterized as tech-savvy and demanding, expressing a strong desire for a real-time usage app. Motivations for reducing water wastage mainly surround avoiding unnecessary costs. Despite this, many of these customers tend to be somewhat oblivious to water wastage. Some state that they would change their water behaviour as a result of awareness, others stated that they would be unlikely to restrict their water usage for any reason. Reducing water wastage, smart metering and compulsory metering are highly ranked by future billpayers. This group also expresses a desire for quicker solutions in reducing leaks and are generally comfortable with the technology associated with smart meters. Future billpayers express a strong desire for ambitious goals in leakage reduction, with 77% wanting the ambition of reducing leakage (from 2017/18 levels) by 50% to be achieved before 2050. Similarly, 72% of Future billpayers desire a reduction in the average amount of water each person uses each day before the 2050 target. They suggest using smart meters and water audits to increase customer awareness of water usage and how to reduce it, but emphasise that such efforts should not notably impact their quality of life.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
SSC PR19 Foundation Research - Full Report - June 2017	Foundation Report – Qualitative Findings: Full Report (Accent) – June 2017	(8 future bill payers) FBPs are more tech savvy and demanding, and are keen for a real-time usage app. Reduction of wastage often focused on keenness to avoid unnecessary costs to self. Water moments observations – FBPs (and pre-family) tended to be waste oblivious. Some claimed behavioural change as a result of this exercise, but others claimed they would be unlikely to restrict their usage for any reason.	FBPs are more waste oblivious, whilst other customers were more waste conscious.
SSC WRMP Full Report - Oct 2017	WRMP and Long-Term Resilience Customer Engagement Insight – Full Report (Community Research) – September 2017	A spontaneous priority for FBPs was reducing waste of water.	No differences to note
SSC Appendix E - customer research findings summary - CAM WRMP	Appendix E Customer Research Findings Summary – Cambridge Water – Water Resources Management Plan: Appendices	Leakage was put in the top priority bucket for investment among both HH groups (future bill payers and higher socio-economic) when asked to consider 17 attributes. FBPs were more positive about smart metering, with many wanting this delivered through an app or other digital approach.	Leakage being a top priority was also seen amongst other HH groups, not just FBPs.
SSC Appendix A07 - PR19 data triangulation study - SSW WRMP	PR19 data triangulation study - SSW WRMP	Smart metering – FBPs were more positive about smart metering, with many wanting this delivered through an app or other digital approach.	FBPs were more positive about smart metering than current customers.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	(9 future bill payers) Mentions of compulsory metering. In SSW, compulsory metering was picked as one of the top 3 options by 3 or 4 future bill payers. It was much less popular amongst current customers.	FBPs were more likely to feel that reduced PCC targets were achievable than bill payers.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
		In CAM, 4 out or 5 FBPs chose this option, but in this region it was a more popular choice for all.	
SSC WRAP Deep Dives Report	South Staffs and Cambridge Water: Findings from the WRAP (Water Resources Advisory Panel) DEEP DIVES on universal metering and water transfers (Community Research) – November 2021	(15 future bill payers)	FBPs were slightly more likely to prioritise AMI metering than current customers.
Hafren Dyfrdwy WRMP Customer Research Debrief FINAL	Hafren Dyfrdwy Water Resources Management Planning: Customer Research Debrief (Blue Marble) – June 2022	(4 future bill payers) FBPs want quicker solutions for reducing leaks: HD should be more ambitious in their timeline. FBPs were pro smart meters and willing to have them installed – comfortable with the technology.	Smart meters received mixed reviews, but FBPs were notably pro smart meters.
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Metering FBPs, and shared bill payers, were less interested in metering than other HH groups.	No differences to note
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	(91 FBPs) Summary of WTP results – Observed positive customer valuations of incremental charges in service for four attributes; risk of a temporary 'do not drink' notice, water lost to leakage from pipes, chance of property flooding from a burst pipe, and supporting nature and wildlife. But none of these results are statistically significant.	The positive WTP attributes seen for FBPs were the same for HH and NHH customers.
CCW Environmental Awareness Index, 2023	Environmental Awareness Index Summary Report	One of the recommendations: Target communications about water and the environment to men, younger people (18-24), renters and those who do not currently have responsibility for paying a water bill because these are the groups with the lowest Environmental Index Scores.	No differences to note
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research	(Qual: 6 FBPs, Quant: 82 FBPs)	FBPs showed a similar ambition level for leakage reduction to NHH customers, but a lower

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
	Presentation July 2023	In terms of leakage reduction, 77% of future customers wanted the ambition to be achieved before 2050. When looking at reducing water consumption, 72% of FBPs wanted this ambition to be achieved before the 2050 target. FBPs felt they were less mindful of water when they were at work, for example, they thought nothing of leaving the tap running in the office. They suggested using smart meters and water audits to make customers more mindful of their usage, but they did not want to limit their own usage to the extent that it would impact on quality of life.	proportion of FBPs wanted it to be achieved by 2035. Compared to HH customers, FBPs had a slight preference for waiting for innovation before investing in greater leakage reduction. In regards to reducing water consumption, FBPs displayed similar levels of support for achieving the ambition before 2050 to NHHs (72% and 69%), compared to 52% of the whole survey sample.

Vulnerable vs other customers – Demand side options

The table below summarises vulnerable customers' preferences in relation to demand side options. There seems to be a lack of WTP for reducing leaks among vulnerable customers. On the other hand, there seems to be support for universal metering. Vulnerable customers were more likely to reduce their water usage compared to non-vulnerable customers, with one of the main drivers being wanting to save money, especially as those who are financially constrained are at risk of hardship from even small increases in their bills.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Vulnerable and low-income customers were, overall, not willing to pay for reducing leaks.	HH customers generally supported the plan to reduce leakage by 50% by 2050, with analysis suggesting HH customers were WTP to reduce per centage of water lost to leaks. In comparison, overall, vulnerable customers were unwilling to pay for reducing leaks.
WRMP24 Themes 1 and 3 Accent Study	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	52% of customers on the PSR supported universal metering.	Support for universal metering did not vary much when looking between different levels of income, or PSR status or people on benefits. 52% of customers on the PSR and 49% of customers who are not on the PSR, supported universal metering.
WRE: Club Customer Engagement report	WRE: Club Customer Engagement Final Report: Combined (Blue Marble) – September 2021	Universal metering was seen as a very attractive demand side option to economically vulnerable customers as it meant there was potential to save money. Along with leakage reduction, it ranked as one of the top three most-liked options by 47% of economically vulnerable customers.	33% of HH customers selected universal metering as one of their top 3 most liked demand options compared with 47% of economically vulnerable customers.
Britainthinks: Water Club Changes of Source	Water Club: Changes of Source Full Report (Britainthinks) – June 2022	In the focus groups, customers who are more financially constrained and at risk of experiencing hardship with even small increases in monthly costs are more likely to be conscious of and to reduce their water usage – motivated by the need to keep bills down.	Broadly, most (non-vulnerable) customers in the focus group saw water as a cheap resource with moral responsibility being the driver for reducing water usage. However, customers likely to be financially vulnerable are more likely to engage in water-reducing behaviour to save money.

Stakeholders vs customers - Demand side options

The table below summarises some of the key themes relevant to demand side options from the stakeholder consultation undertaken during the WRMP24 planning process. Stakeholders generally support measures to reduce water consumption. They emphasise the importance of addressing leakage, water efficiency measures and smart metering. Stakeholders and SSC customers are aligned in thinking that leakage reduction is of high importance. Also, among stakeholders there is a desire for government intervention on water efficiency, with some urging for more ambitious targets and subsidisation of water saving products. Some NHH customers have also suggested similar interventions.

Whilst stakeholders welcome smart metering, concerns about affordability and bill predictability, especially for vulnerable customer, are noted. This is similar to HH customer views, and especially, that of vulnerable HH customers. Some stakeholders favour universal metering, but with careful timing and affordability protection, which is again, similar to findings of other customer groups.

On demand management, stakeholders sometimes also focus on communication and education, especially in deprived areas. This point has also come up in research projects with other customer groups. Stakeholders stress the need for clear plans, ambitious targets, and the integration of NHH customers into water reduction efforts, with ongoing monitoring and adaptation. These overarching views on managing demand are more developed for stakeholders, and in some instances, NHHs, compared to other SSC customers.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	89% of WRW stakeholders support the government measures to reduce consumption alongside measures water companies can take (e.g. leakage). Leakage: Stakeholder feel progress on tackling leaks is a prerequisite for having a meaningful conversation about water efficiency. Water efficiency: Stakeholders would like the government to intervene. Those with experience in water related matters would also like the current target for 110L PCC by 2040 to be brought forward (rather than increasing to the target to say 80L) and they would like to see subsidised water saving products. Metering: Stakeholders strongly support proactive smart metering and they welcome compulsion. But they worry about the impact on vulnerable customers i.e. possible price hikes and the unpredictability of bills. 72% of stakeholders support proactive smart metering.
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Not much informed discussion from stakeholders on any demand management options, apart from metering. Stakeholders offered to help with WRMP development and implementation, e.g. by supporting customers with financial problems that might arise from universal metering. Metering: Range of opinions on universal metering. Some stakeholders saw the value in universal metering, but did raise concerns about bill increases, particularly now, alongside increases in food and energy bills. If SSW does introduce it, there was a call for the company to consider timing and take care to protect affordability. Some welcomed it as an effective way to make people more aware of and careful about water usage, and it can be seen as a fair and reasonable way to charge. Reducing demand: SSW could do more to help HH customers reduce demand. Some stakeholders argued for more communication and education around water use and bills. Others believed that communication/education could be slow or ineffective, especially in deprived areas where there is more to worry about than the environment. The offer of subsidised water saving products was welcomed. PCC targets: Different levels of understanding and different views. Some stakeholders felt that the target of 2050 seemed too far away, and thought progress should be made faster. Some felt it was a reasonable timeline. Others said it depends, if abstraction can be reduced and environmental goals

		met with 2050 timeline, then it is acceptable. If not, PCC targets should be reduced sooner. Leakage: Did not come up spontaneously and there was no direct call from stakeholders attending the event for SSW to tackle leakage.
appendix-b15-nhh -engagement-report-august-2022	WRE Promoting water efficiency among non-household customers: Understanding how wholesalers can motivate usage reduction (Blue Marble)	About half claimed to be aware of short or long-term demand problems for water, but not to the level of detail shown. The NHH market is open to reducing water usage but the main barrier is complacency. In terms of propositions, NHH customers are busy and need help to navigate the services available, most don't have time or inclination to self-serve. In the short-term, the best propositions are: leak alerts with incentives, and in-person audit and install. Longer term, propositions that are not of interest to NHH today rely on motivations beyond cost benefit, and required effort and potentially investment. These propositions have potential to engage NHH once wider societal and environmental drivers exist – self-service tools, generic advice (e.g. on recycling) and accreditation schemes.
South Staffs and Cambridge Water – Your Water your Say	SSC Your Water Your Say (YWYS) Transcript FINAL	Question and Answer section of the event: One SH asked what is the plan with smart meters, is it that everyone pays a fair share subject to the safeguard for the vulnerable? The chair of federation Cambridge resident's association is worried that residents are not aware of the urgency of the situation, and wonder how SSC communicate changing behaviour and saving water.
Cam Water WRMP consultation – Cambridge and SGP response	Cambridge and South Cambridgeshire Green part – Cambridge Water's Draft Plan	They think a priority should be to take much more concerted and urgent action to manage demand, with actions that go beyond reliance on voluntary individual behaviour change. targets laid out in draft cam water WRMP are largely inadequate. They also think the target of 110 litres per person per day by 2050 should be more ambitious - it should be 80 l/p/s as soon as possible. They also want universal metering to be rolled out as soon as possible.
Cambridge Water_WRMP_Consultation Response_NFU_FINAL	National Farmers' Union of England (NFU) Consultation Response	They were asked 'Do you support our target to reduce total leakage from our distribution network and from customer properties by 50% compared to 2017/18 levels by 2050?' - Yes, but there needs to be a toolbox of options to meet future supply deficits - through demand management, i.e. reducing leakage and supply options. 'Do you support our target to reduce HH consumption to 110 litres per person per day by 2050?' All the options to support Cam water's demand management should be included. a toolbox of options will be required, as is stated in the WRMP. 'Do you support our preferred plan to install smart meters for all customers by 2035?' The NFU is not in a position to agree or disagree by welcomes further conversation. Important that messaging around compulsory metering is clear and concise and outlines the remit for metering and the customer benefits. Needs to be robust data security and data governance mechanisms. NFU asks for messaging to include best practice use of water and particularly look at an integrated approach that supports the multi-sector approach which can be used in times of stressed/limited water availability, e.g. droughts.
CW dWRMP24_ Cambridge_SouthCambs	Cambridge City Council and South Cambridgeshire District Council Joint Response to Cambridge Water's Draft WRMP	Further education initiatives in water usage are encouraged to inform people about the serious water stress in the region. Many people are very unaware, and don't understand the importance of conserving water. It is important that the WRMP properly reflects existing and committed development and seeks to plan for anticipated development needs. The Councils are supportive of the demand side management measures set out in the WRMP for both HH and NHH uses. Demand side measures provide opportunities to make better, more efficient use of the water available through minimising waste by leakage control, smart metering, re-using water and encouraging individual water-saving behaviour. The effectiveness of these

		measures will need to be continually monitored in order to ensure that they are providing the predicted savings. The councils question the timetable for universal smart metering by 2035, as the neighbouring water company Anglian water aim to achieve this by 2030. The Councils firmly believe that this target should be brought forward to at least 2030. The installation of smart meters could be accelerated, and other water companies (e.g. Severn Trent) have been tackling this far more effectively. The water company should take a more active role to ensure that individual properties are metered to deliver the most effective water management. Retrofitting existing buildings to reduce water use will be essential and is urgently required. The Councils would welcome further exploration of how this could be achieved, either on a site/campus or an area wide basis reflecting on best practice elsewhere with officers from CAM water and the EA.
MOSL's Response to South Staffordshire Water's Draft WRMP	Market Operator Services Limited (MOSL) Response to WRMP	Pleased to see a number of commitments to the NHH market in SSC's draft WRMP, including a commitment to universal NHH smart metering. They were also pleased to see options explored around NHH water efficiency and the draft plan aims to meet Defra's target to reduce NHH demand by 9% by 2038.
Official Sensitive_Cambridge Water dWRMP consultation_Ofwat response	Ofwat Cambridge Water Draft WRMP consultation response	Some areas of CAM Water's plan are in line with their expectations for this stage of a draft WRMP. In particular, it delivers in its expectations of setting its ambition towards demand management targets, including leakage and per capita consumption. The plans' demand management ambition and outcomes are in alignment with government targets and statutory requirements for water demand. They think CAM Water has looked at a limited range of demand management options and provides insufficient evidence for how it optimised its demand management strategies. They expect CAM water to explain and provide sufficient evidence for how the strategies were devised and how the preferred strategy represents the best value approach to meet a supply-demand balance.
South Staffs Water Representation WRMP24 FINAL	Environment Agency – Representation on South Staffs Water's draft water resources management plan	They are supportive of a demand reduction based plan but this comes with risks that SSW has not adequately considered. EA recommend that SSW revises substantial parts of the plan. They recommend to ensure there is a clear plan to achieve the proposed demand reductions and that it is deliverable. SSW need to provide assurance on how they will deliver the demand side options and what it will do if it fails to deliver reductions in demand. SSW should improve how it includes the options of smart meters and review uncertainty around other demand options. They should engage with retailers to ensure it improves NHH demand forecast and it includes additional options to reduce NHH consumption and contribute to the 2037/38 target under the Environment Act 2021. They should also provide clear information on how existing water efficiency activity is factored into the baseline demand forecast.
Trisha McAuley open letter on wholesalers draft WRMPs	Strategic panel and committees – open letter to wholesaler CEOs regarding WRMPs	The panel is clear that water efficiency is an issue of strategic importance for the future resilience of water supply and the environment. It is important that market participants and customers are incentivised to use water efficiently and that the market enables customers to better understand their consumption. Water efficiency needs to become core to everybody's business and meaningful wholesaler engagement in relation to the NHH market is critical. An essential enabler for this is water companies' WRMPs and commitments to smarter metering. The strategic panel does not believe that water companies are currently considering the needs and potential contribution of NHH customers. With DEFRA's targets to reduce NHH demand by 9% by 2038 now confirmed, more work is needed by water companies to go further, not only in the commitments set around metering and efficiency in the NHH market, but also

		for these commitments to be more prominent in the plans. The NHH market must be fully integrated into these plans as business customers represent a significant opportunity to reduce demand and as the majority of NHH customers use water for the same purposes as HH customers (taps and toilets).
WRE draft regional plan feedback Ofwat 29 Mar 2023	Ofwat, WRE draft regional plan	Ofwat expect companies, working as part of regional groups, to reduce demand for water to relieve pressures on water supply and increase resilience to extreme drought. They expect companies to adhere to demand targets; halving leakage across the industry by 2050, in comparison to 2017-18 levels, and reduce personal consumption to 110 litres per head per day by 2050. Ofwat is seeing a lack of robust and tailored glidepaths to meet those targets, and their concerns remain around the deliverability of demand management strategies. Without robust testing and tailoring of demand management strategies within and between companies, they cannot be confident we are seeing optimal proposals. They expect to see ambitious NHH demand reduction in plans.
Waterscan - SSW WRMP24 Response	Waterscan - South Staff Water WRMP24 Consultation Response 20022023	Across all companies reviewed, Waterscan supports careful investment into improving drought resilience, reduced leakage and reduced per capita consumption. They expressed concern however for companies defaulting to targets over these issues rather than showing more suitable and ambitious targets, stating that current targets are not challenging enough. They are supportive of SSW's plan for universal metering; however, they would prefer a clearer and earlier deadline on the plan (prior to the penultimate page). Show an interest in smart metering however state that plans are often broad without any substantial detail to inspire confidence in these plans. States that smart meter investment should be focused on where there are opportunities and needs for water reduction, specifically in NHHs in the middle sector of the market where there is a balance between opportunity and customer engagement to reduce water.
Arqiva - Cambridge Water - draft water resources plan consultation response	Response to Cambridge Water's WRMP draft, specifically focussing on Cambridge water's ambition to deliver AMI metering to its customers.	Arqiva is the UK's only large-scale provider of gold-standard Advanced Metering Infrastructure (AMI) smart water meter. Arqiva welcomed Cambridge Water's ambition to deliver AMI metering to its customers by 2035 as outlined in the WRMP draft and are open to collaborating to ensure the delivery of the benefits of AMI to demand reduction as they felt it was one of the best ways to reduce demand which will improve the resilience of public water suppliers, reduce the amount of energy required to treat drinking water, and help customers realise savings on their household bills.
Arqiva response - South Staffs Water - draft water resources management plan	Response to South Staff Water's WRMP draft, specifically focussing on South Staff water's ambition to deliver AMI metering to its customers.	Arqiva is the UK's only large-scale provider of gold-standard Advanced Metering Infrastructure (AMI) smart water meter. Arqiva welcomes South Staffs Water's focus within the draft plan on delivering the benefits of AMI smart metering to consumers from the next regulated asset management plan period. Arqiva agree with South Staffs Water in highlighting the value of AMI meters in enabling various options to reduce water demand, including the ability to detect leaks faster and support reduced household consumption and so encourage South Staffs Water to pursue an ambitious rollout of AMI within the 2025-2030 period, to help ensure the delivery of its benefits to demand reduction are not delayed.
Waterwise - Cambridge Water dWRMP24 Response (Apr 2023)	Waterwise Consultation – Cambridge Water Draft WRMP	Overall, Waterwise is pleased to see significant detail in the draft plan on how future demand has been calculated and the demand management options that have been considered when it comes to HH demand and leakage. They want to see the final plan reference the new UK Water Efficiency Strategy to 2030 which the company helped develop. They support the plan in targeting to achieve 110 litres per person per day expectation of government and regulators. Good mix of HH visits and work with housing associations alongside incentives for water reuse and water neutrality. Progress will need to be closely monitored and the programme ramped up if it falls behind expected demand reduction levels.

		They query the water efficiency costs which shows minimal costs incurred after AMP8 with no water efficiency programme costs included in AMP9 and AMP10. They do not believe that there should be no budget for water saving between 2030 and 2040. e.g. with the planned roll out of smart meters through to 2035, a budget is needed to proactively engage with customers on their consumption through an app or digital portal. They also think there should be HH water saving visits for new homes and for people moving house. They would like to see a campaign on leaky loos. Also encourage CAM to introduce a campaign on dual flush toilet buttons. This could be integrated into home visits. They would like CAM to commit to trialling flow controllers. E.g. could be fitted alongside meters in the roll out programme. Could also work with LAs and housing associations to install them in social housing. They fully support proposed universal smart meter roll out to HH and NHH properties and think this should be rolled out before 2030. Should also engage with customers on water saving. They also support NHH reduction plans, but hope to see this more clearly flagged in the final plan.
Waterwise - South Staffs Water dWRMP24 Response (Feb 2023)	Waterwise Consultation – South Staffs Water Draft WRMP	Overall, they are pleased to see significant detail in the draft plan on how future demand has been calculated and the demand management options that have been considered when it comes to HH demand and leakage. They want to see the final plan reference the new UK Water Efficiency Strategy to 2030 which the company helped develop. They support the plan in targeting to achieve 110 litres per person per day expectation of government and regulators. Good mix of HH visits and work with housing associations alongside incentives for water reuse and water neutrality. Progress will need to be closely monitored and the programme ramped up if it falls behind expected demand reduction levels. They query the water efficiency costs which shows minimal costs incurred after AMP8. Needs to be more home visits before 2050. Should be a budget for digital platform or app to go with metering roll out. They would like to see a campaign on leaky loos. Also encourage CAM to introduce a campaign on dual flush toilet buttons. this could be integrated into home visits. They would like CAM to commit to trialling flow controllers. E.g. could be fitted alongside meters in the roll out programme. Could also work with LAs and housing associations to install them in social housing. They fully support proposed universal smart meter roll out to HH and NHH properties by 2035. Should be a budget to engage with HHs and NHHs about saving water. They also support NHH reduction plans, but hope to see this more clearly flagged in the final plan.
Waterwise - South Staffs Water dWRMP24 Response (Feb 2023)	Waterwise Consultation – South Staffs Water Draft WRMP	Overall, they are pleased to see significant detail in the draft plan on how future demand has been calculated and the demand management options that have been considered when it comes to HH demand and leakage. They want to see the final plan reference the new UK Water Efficiency Strategy to 2030 which the company helped develop. They support the plan in targeting to achieve 110 litres per person per day expectation of government and regulators. Good mix of HH visits and work with housing associations alongside incentives for water reuse and water neutrality. Progress will need to be closely monitored and the programme ramped up if it falls behind expected demand reduction levels. They query the water efficiency costs which shows minimal costs incurred after AMP8. Needs to be more home visits before 2050. Should be a budget for digital platform or app to go with metering roll out.

		They would like to see a campaign on leaky loos. Also encourage CAM to introduce a campaign on dual flush toilet buttons. this could be integrated into home visits. They would like CAM to commit to trialling flow controllers. E.g. could be fitted alongside meters in the roll out programme. Could also work with LAs and housing associations to install them in social housing. They fully support proposed universal smart meter roll out to HH and NHH properties by 2035. Should be a budget to engage with HHs and NHHs about saving water. They also support NHH reduction plans, but hope to see this more clearly flagged in the final plan.
Cambridge Water representation dWRMP24	Environment Agency – Representation on Cambridge Water's draft water resources management plan	Concerned CAM will not deliver demand reductions stated in the plan. Fast and effective rollout of smart metering is key to reduce demand. The planned smart meter implementation is slower than other programmes in England. The pressure on water resources means they expect CAM to deliver smart metering at a faster pace. It should aim to complete the full rollout by 2030 or earlier. The company should provide greater evidence that its demand management programme will succeed.
SST dWRMP24 Consultation Summary	SST dWRMP24 Consultation Summary	CCW welcomes the focus on NHH customers and demand management in water supply plans. Market Operator Services Limited called for a nationwide approach to demand reduction. Ofwat expect WRMP to align short term interventions with long term targets and highlight concerns on leakage reduction, PR19 performance commitments. SSWs high water loses allowance raises questions about appropriateness and impact on investments. CCW highlight the need for support to vulnerable and larger households during meter roll out and urges for behavioural science approaches for persuasion in installation. Market Operator Services Limited emphasises the integration of NHH market into plans, targeting the highest water users, additionally advising treating smaller NHH customers like HH customers for efficiency programs. Ofwat expects companies to demonstrate meeting long term targets, reduce leakage and consumption, encouraging smart meter rollout plans and collaboration with retailers. Waterscan calls for exceeding government targets focusing specifically on NHH water efficiency and transparency on smart meter data. Ofwat and other stakeholders provide recommendations on demand reduction, leakage, metering and environmental resilience.
SSW WRMP draft Evidence Report FINAL	Environment Agency, Appendix 1: South Staffs Water WRMP evidence report	The EA recommends that SSW should ensure there is a clear plan to achieve the proposed demand reductions and that it is deliverable. Demand side options: The plan does not contain detailed info about how SSW will deliver the preferred plan demand side options. SSW are currently off track to deliver the demand side actions in its current (2019) plan. They need to include more detail. Adaptive planning: there is no clear plan B to show what they would do if the proposed demand side options fail to deliver sufficient water savings. They need to take an adaptive planning approach, and include more detail about this in their plan. Smart meters: The plan assumes that smart metering alone would not deliver benefits in terms of customer water savings, but evidence from other trials suggests this is untrue. They need to reconsider this, and explore smart meter options and best value planning.

		NHH demand forecasting: The plan does not present adequate understanding of its NHH customer base. They need to do further work here. Baseline water efficiency activity is not clear.
CVF Response	Cam Valley Forum (CVF) consultation response to Cambridge water on their draft water resources management plan for 2024	CVF is in strong favour of using TUBs as a tool where there is severe shortage. However, they believe there needs to be a much lower threshold than the current TUBS trigger levels requirement used by Cambridge Water.
CCW response to the SSC draft WRMP - February 2023	CCW response to South Staffs Draft WRMP 2024	When discussing roll out of universal metering, the plan did not address the concerns mentioned in customer research, and in particular the need to provide reassurance that support will be provided to the vulnerable, those struggling with affordability and larger households during to the transition, and after the roll out. The plan's strong focus on demand management solutions reflects the clear message from customer research / engagement that, to be acceptable, the plan must make the best possible use of the current water resources before investing in any large-scale supply side options. Much depends on reducing leakage and PCC, supported by universal metering. Given the challenges other water companies have faced in implementing universal metering it would have been useful to see more detail in the plan on how SSW will use a behavioural science approach (or other similar innovations) to persuade customers it is the right thing to do. It will also be important to learn from the experience of other companies and to offer both practical and financial support to customers where needed. CCW looks forward to discussing these plans with the company. It is notable that the plan outlines the company's long-term ambition to achieve: • 50% reduction in leakage (from 2017/18 levels) by 2050 • 110 l/h/d household consumption by 2050 • 9% reduction in non-household consumption by 2037 CCW expect the final plan to make reference to the interim statutory demand targets outlined in DEFRA's Environmental Improvement Plan (EIP) to: • reduce household water use to 122 litres per person per day (l/p/d); • reduce leakage by 37% (20% by 31 March 2027 and 30% by March 2032); and, • reduce non-household (for example, business) water use by 9% all by 31 March 2038. Would like to see a glide path showing what level and when reductions in demand are expected to be delivered. Would like to see more work to reduce NHH demand and increase water efficiency.
CCW response to the Cambridge Water draft WRMP - May 2023	CCW response to Cambridge Water Draft WRMP 2024	In discussing the roll out of universal metering, it is positive that the cost-of-living crisis and affordability concerns are recognised, but CCW would like to see the plan provide clearer re-assurance that support will be provided to the vulnerable, those struggling with affordability and larger households during the transition to and after meter roll-out Given the challenges other water companies have faced in implementing universal metering it would have been useful to see more detail in the plan on how Cambridge Water will use a behavioural science approach (or other similar innovations) to persuade customers it is the right thing to do. It will also be important to learn from the experience of other companies and to offer both practical and financial support to customers where needed. CCW looks forward to discussing these plans with the company. It is notable that the plan outlines the company's long-term ambition to achieve:

		• 50% reduction in leakage (from 2017/18 levels) by 2050 • 110 l/h/d household consumption by 2050 • 9% reduction in non-household consumption by 2037 They expect the final plan to also make reference to the interim statutory demand targets outlined in DEFRA's Environmental Improvement Plan (EIP) to: • reduce household water use to 122 litres per person per day (l/p/d); • reduce leakage by 37% (20% by 31 March 2027 and 30% by March 2032); and, • reduce non-household (for example, business) water use by 9% all by 31 March 2038. CCW would wish to see a glide path showing what level and when reductions in demand are expected to be delivered. CCW would like to see greater ambition on how the wholesale company should work with business customers and retailers in the short and long term to reduce demand and increase water efficiency.
South Staffordshire Water - Smart Meters	South Staffordshire Water - Smart meters DEFRA	The letter addresses the need for increased smart metering to manage water demand and supply due to the impacts of climate change and population growth. Regional water resources plans indicate the requirement of an additional 4,000 million litres of water a day by 2050, with half of it coming from demand reduction. The Environment Act 2021 mandates a 20% reduction in water demand per capita in England by 2037/38, and the Environmental Improvement Plan outlines strategies to achieve this. The plan emphasizes policies and water company expectations regarding consumption and leakage reduction. It specifically mentions the implementation of "increased smart metering for households and businesses" between 2020 and 2030. The benefits of smart metering are highlighted, including leak detection and improved water usage insights. Water companies are urged to consider rapidly increasing the installation of meters for both household and non-household customers, even when metered volume charging is not feasible. Adoption of 'smart' meters for new and replacement installations is encouraged, provided it aligns with customer and environmental benefits. The letter clarifies that installing smart meters doesn't require changes in billing procedures.
Official Sensitive_South Staffs Water dWRMP24_Ofwat response letter	Ofwat South Staffs Water draft WRMP	Ofwat welcome that SSW has set out its plans to reduce leakage by 50% from 2017-18 levels by 2050. SSW indicates it will deliver a dry year annual average (DYAA) PCC of 110 l/h/d by 2050, meeting industry targets. The company's final WRMP should also reference the target to reduce distribution input by 20% by 2037-38 and demonstrate how it plans to deliver this through a combination of reductions in the key demand components, leakage, HH and NHH consumption. Ofwat thinks the company has looked at a limited range of demand management options and provides insufficient evidence for how it optimised its demand management strategies. With leakage reduction, the company tests two scenarios, and both aim to achieve the same target reduction of 50% and the company does not test achieving other targets nor it is clear how the testing has influenced the selected target presented in the draft plan. Ofwat is concerned that in the draft WRMP data tables the company does not forecast to reduce non-household demand and, across its both operating areas, forecasts a 9.4% increase by 2029-30 based on its draft WRMP. In response to a query regarding demand values the company has confirmed

		that all demand numbers are being refreshed between draft and final WRMP to ensure they include the latest data available and therefore this may lead to some slight variations of this data as a result. Ofwat expect the company to set out and clearly justify an ambitious strategy for non-household demand reduction in its final WRMP.
NT response South Staffs dWRMP 2023	National Trust South Staffs WRMP	The Trust expects that the final plan will incorporate a clear communication and education strategy on management of demand
CVF Response	Cam Valley Forum (CFV) Response to Cambridge Water's Draft WRMP	CVF is of the firm opinion that growing towards a local water saving culture and having it in place with customers is a very important component in getting this right. Want more info about the demand research that has been done. Reducing leakage: It is disappointing to be unable to tie down the problem of actual volumes of water leaked per unit time. Reducing usage: Could the per capita consumption (PCC) ambition of 110 litres per person per day by 2050 not be brought forward to an earlier date? CVF emphasise that this is a social ambition for society more than a company responsibility. Incentivising water recycling: Cam Valley forum fully supports water recycling/reuse options. The water industry should put its energy behind all such modifications to local building regulations. Local Authorities need to demand the facility to better influence local planning laws. Metering: Metering is an obvious gain as metered properties use less per capita than unmetered properties. This has been well researched for the draft WRMP. In an inequitable society (and Cambridge City is a national exemplar of one such!) one would not want excessive water prices to fall on heads of the less well off. However, at present Ofwat pricing is so low that it does not encourage water saving and has the side-effect here of wasting water and harming the environment. CVF need a water company and citizenry to demand equity in pricing and the best steps in that direction would be smart metering for all. Again, it is a case of upping the ambition. If you feel it can be done by 2035 why not sooner - by 2030.
Cambridge Water Email	Cambridge Water Email - Cambridgeshire County Council	Support for reduction of HH consumption to 110 litres per person by 2050 however believe this cannot be achieved through just smart metering and educational work, needs investment into more water efficient homes and businesses, with the option of retrofitting where appropriate. Does not believe the 50% reduction in leakages by 2050 figure is ambitious enough and needs a more urgent delivery date. Wishes to reduce abstraction from existing sources by 2050, and to incorporate water abstraction, flood risk, irrigation and biodiversity enhancements, to reach net zero for Cam county council by 2045 including working with partners. Would prefer action sooner over later to aid the resilience of local farmers through catchment advisors.

8. Source preferences, reservoirs and water transfers Appendix

SSW vs CAM – Source preferences, reservoirs and water transfers

The table below summarises SSW and CAM preferences in relation to source preferences, reservoirs and water transfers. Regional differences in this area were relatively scarce, however CAM customers were found to prioritise the building of a regional storage reservoir much more than SSW customers.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC WRMP MCDA Quant insights 2022	SSC WRMP: MCDA – Quantitative Insights (Accent) – July 2021	SSW customers placed building a new regional storage reservoir as a fifth top priority for HH and NHH customers alike, with 8% selecting this as a priority.	CAM customers placed building a new regional storage reservoir as a third top priority for HH and NHH customers alike, with 11% selecting it as a priority.	CAM customers prioritised the building of a regional storage reservoir more than SSW customers

HH vs NHH – Source preferences, reservoirs and water transfers

The table below summarises HH vs NHH preferences in relation to source preferences, reservoirs and water transfers. In CAM region, HHs and NHHs both agreed that building a new regional storage reservoir was an important priority. However, in Severn Trent's region, HH and NHH top preferences for supply side options did differ slightly.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Quant MCDA Study - Feb 2022	SSC WRMP: MCDA – Quantitative Insights (Accent) – July 2021	In CAM, building a new regional storage reservoir was the third top priority for HH customers.	In CAM, building a new regional storage reservoir was also the third top priority for NHH customers.	No differences.
Severn Trent WRMP24 Report	Severn Trent Water – WRMP24 Report (DJS Research) – May 2022	*Not SSC related findings:* In Severn Trent region, when HH customers were asked about supply options; 'recycling or re-using water indirectly' was ranked first, 'increasing the size of reservoirs' was the second most important supply option, and 'maximising the outputs of current treatment assets' was third.	*Not SSC related findings:* In the Severn Trent region, for NHH customers 'increase the size of existing reservoirs' was the most important supply option, 'increase capacity of water treatment works' was ranked second and 'maximise outputs of our current water treatment assets' was also ranked third.	*Not SSC related findings:* HH customers thought reducing or reusing water indirectly was the most important supply side option, whilst NHHs thought increasing the size of existing reservoirs was most important. This most important factor for NHHs, was HHs second most important factor. Alternatively, NHHs second priority was increasing capacity of water treatment works. Both HHs and NHHs agreed that the third priority was maximising outputs of current treatment assets.

Future customers vs current customers – Source preferences, reservoirs and water transfers

The table below summarises future customer preferences in relation to source preferences, reservoirs and water transfers. Future billpayers express a desire for water companies to be more transparent about water use and preservation methods. Some future customers suggest that water transfers should be a last resort, emphasising water company self-sufficiency and environmental concerns. They also express surprise that more people are not concerned about water quality post-transfer, particularly if it involves higher costs. Overall, future billpayers are generally positive about the concept of water transfers.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions	9 future bill payers A FBP from the CAM water area noted a desire for companies to be more transparent about water use and how to preserve more	No differences to note
SSC Deep Dives Report FINAL 04.11	South Staffs and Cambridge Water: Findings from the WRAP (Water Resources Advisory Panel) DEEP DIVES on universal metering and water transfers (Community Research) – November 2021	Some future customers suggested that water transfers should be only used as a "last call" as they believe water companies should be self-sufficient and worry about the environmental impacts. Some future customers were surprised that more people were not concerned about the quality of the water they would be receiving post-water transfer, especially if they were paying more to receive it.	Being surprised about a lack of concern for the quality of water post-water transfer seemed to be common place within the sample group, both among FBPs and current bill payers.
Hafren Dyfrdwy WRMP Customer Research	Hafren Dyfrdwy Water Resources Management Planning: Customer Research Debrief (Blue Marble) – June 2022	(35 future customers, included future customers up to 30 years old) In general, FBPs were positive about water transfers.	Regarding transfers, the majority of customers support water sharing so long as there is sufficient water in the doner.
SRO Public Value	SRO Schemes Research Combined Insights - July 2022	One future customer noted concern for children's play areas being located near reservoirs and other water sources.	No differences to note

Vulnerable vs other customers – Source preferences, reservoirs and water transfers

No differences were observed between vulnerable and non-vulnerable customers in relation to source preferences, reservoirs and water transfers.

Stakeholders vs customers - Source preferences, reservoirs and water transfers

The table below summarises some of the key themes relevant to source preferences, reservoirs and water transfers from the stakeholder consultation undertaken during the WRMP24 planning process. Stakeholder source preferences views are usually very specific, and related to very specific locations or their own business activities. Some stakeholders would prefer SSC to focus on demand management more than supply options, but the need for some short-term supply options was noted, whilst a focus on preserving long-term strategies should remain important. There was some enthusiasm for greywater recycling due to its low impact. Water transfers between regions were seen as sensible by some, but politically divisive by others. Here, stakeholders have a better understanding compared to other customer groups. Stakeholders did have some concerns and require more information about, for example, accurate supply forecasts, the feasibility of some proposed schemes, and sustainability issues with chalk aquifers. Stakeholders have niche, and often quite developed views in relation to source preferences, compared to SSC customers.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Stakeholders show little appetite for 'hard engineering' solutions (e.g. new reservoirs). They feel demand management should take priority and there is enthusiasm for grey water recycling (low impact and minimal disruption to customers). Stakeholders feel it's sensible to share water (supported by 75% of stakeholders), but accept it may be "politically divisive" i.e. sharing resources with the South and therefore losing out on development opportunities.
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Increasing storage capacity was briefly discussed as well as storing water from high flow rivers. It was also mentioned that small individually owned reservoirs could be helpful for farmers. Views differed with regards to transfers. Idea was appealing as it makes sense to share resources and help each other out, but one stakeholder was wary and suggested each region should address their own resilience before looking at transfers. Grey water recycling elicited more enthusiasm than any other supply side options – seen to have low environmental impact and minimally disruptive for customers. Stakeholders would however want to know if it's safe, and also who bears the costs of retrofitting extra pipes
South Staffs and Cambridge Water – Your Water Your Say	SSC Your Water Your Say (YWYS) Transcript FINAL	One stakeholder asked about population growth in Cambridgeshire and if the current plan for new source is sufficient – and if there is a higher growth scenario whether there is an adaptive plan.
2023-03-16 WRE response to draft WRMP (Cambridge Water)	WRE response to Cambridge Water's Draft Water Resources Management Plan	Bring forward cost-effective supply-side options to help meet the forecast deficits in the short to medium term, without straying from or undermining the long-term best pathway. WRE also needs to satisfy stakeholders that the significant growth projections in the region can be accommodated at the same time as making progress on improving environmental outcomes. Maximise the potential for significant additional public benefits from the two major new reservoirs proposed in the plan.

Cam Water WRMP consultation - Cambridge and SGP response	Cambridge and South Cambridgeshire Green Party – Cambridge Water's Draft plan	Key point: accelerating the installation of water recycling and rainwater harvesting schemes in both old and new buildings. Limited proposed supply options, and there is uncertainty on whether they are likely to fulfil the requirements that have been identified, and an enormous dependence on the Fen reservoir.
CW dWRMP24_ Cambridge_SouthCambs	Cambridge City Council and South Cambridgeshire District Council Joint Response to Cambridge Water's Draft WRMP	The Councils support in principle the proposed transfer of water from Anglian to Cam Water, from Grafham Water reservoir, which is essential to provide additional supply ahead of the Fens Reservoir being operational and which will support the abstraction reductions required by the EA to protect the chalk streams. Councils support the acceleration of this programme. The Councils also support in principle the proposal for the Fens Reservoir which is being developed in partnership by Cam Water and Anglian Water through RAPID process and which will provide additional strategic scale water supply, with half of the water to supply Cam and half to Anglian Water.
WRE draft regional plan feedback Ofwat 29 Mar 2023	Ofwat, WRE draft regional plan	They question whether the use of transfers that could cascade through the network have been sufficiently explored. WRE need to provide evidence in its final plan that it has explored the potential of transfers, and third-party options, thoroughly.
WRW response to South Staffs draft WRMP	WRW Response to South Staffs Draft WRMP Consultation	WRW supports SSWs exploration of transfers, and request that SSW informs them if the situation changes, so that they can work together.
SST dWRMP24 Consultation Summary	SST dWRMP24 Consultation Summary	CCW noted that it may be difficult for SSW to deliver all demand side solutions and ensure a resilient water supply in 2050 without additional supply side input. Ofwat suggest there is insufficient evidence in the plan to justify changes in draft WRMP24 in comparison with WRMP19, where the reduction in available water for 2025-26 is equivalent to 21% of the company water demands. It suggests underperformance or non-delivery is the cause. The Canal & River Trust offers two canal transfer options. Environmental Agency would want more accurate supply forecasts due to potential overestimation concerns and suggests reviewing resilience based on 2018 and 2022 droughts, addressing carbon impact assessment, and verifying more feasible supply options. Waterscan recommends anticipatory action for wholesalers not forecasting deficits and emphasising innovation. They also note a lack of stakeholder consideration in draft plans specifically for NHH customers, suggesting the impacts on these customers haven't been properly analysed.
Cambridge Water representation dWRMP24	Environment Agency – Representation on Cambridge Water's draft water resources management plan	The EA lack confidence in the company's ability to deliver the demand management reductions from 2025-2050. It wants CAM Water to consider how it can accelerate supply schemes. They don't have any significant viable alternatives to demand management until 2030, when a transfer of water is potentially available from Anglian water and then 2036/7 when the proposed Fens reservoir is due to be delivered. There is uncertainty about the deliverability of both schemes and a lack of alternative plans if these are delayed or cannot be delivered. This presents an unacceptable risk to security of supply and the environment. They need to work with Anglian and WRE to develop fully costed and deliverable alternative options to manage this risk.
SSW WRMP draft Evidence Report FINAL	Environment Agency, Appendix 1: South Staffs Water WRMP evidence report	Environment Agency recommends that SSW ensures the supply forecast is accurate and wants it to ensure that its deployable output is accurate and allows it to achieve all its customer service promises.

South Staffs Water - dWRMP24 Consultation Response - Canal & River Trust 21Feb2023	Canal and River Trust – South Staffs Water draft WRMP consultation	The Trust recognises that SSW has determined that future supply demands in their dWRMP24 can be achieved by implementing their preferred demand management strategy alone, meaning no new supply options will be required. The Trust has previously offered SSW two canal transfer options and are pleased to see these are being evaluated as feasible options. The Trust disagrees with information about a Third-Party Surplus option (Canal & River Trust, Birmingham Blithfield surplus), and want to know more about this discrepancy.
CVF Response	Cam Valley Forum Response to Cambridge Water's Draft WRMP	CVF states that the problems of over-abstraction of water from the Cambridge Chalk aquifer is not new (has been happening since 1855). What was once perceived to be an easily renewable resource is no longer nearly so sustainable. CVF believes that the Chalk aquifer is now the wrong source for the great bulk of public water supply. CVF feels that Cam Water never seems to acknowledge this enough. CVF is very disappointed that there is absolutely no mention in the WRMP of the National Chalk Restoration Strategy.

9. Acceptability and affordability of WRMP24 plans Appendix

SSW vs CAM – Acceptability and affordability of WRMP24 plans

The table below summarises SSW and CAM preferences in relation to acceptability and affordability of WRMP24 plans. Participants in CAM were much more resistant to bills changing within the WRMP24 plan. Participants across both regions believed that the WRMP24 plan delivered a good balance between improvements to services and affordability for the customer. In general SSW customers were more concerned for their future bill prices than CAM customers, while CAM customers favoured investing in services such as leakages.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
WRAP Feedback on draft Water Resources Management Plan 2024 from the WRAP	Feedback on draft Water Resources Management Plan 2024 from the WRAP	Acceptance levels were fairly high for the WRMP24 plan, when presented with adaptive planning changes 8 of 13 participants agreed or strongly agreed that this approach was appropriate, if necessary.	Acceptance levels were fairly high for the WRMP24 plan, when presented with adaptive planning changes 12 of 13 participants agreed or strongly agreed that this approach was appropriate, if necessary.	Most participants from both regions believed the WRMP24 plan found a balance between the need for improvements with a sensible cost. After more detail was given around the current situation and future challenges, there was no change in acceptance level in SSW and in CAM. The lower level of agreement in SSW in comparison with CAM mostly related to concern around possible associated costs if the plan needed to change.
SSC WRMP24 Acceptability Testing Wave 1 Report September 2022	South Staffs Water WRMP24 Acceptability testing Wave 1 report (Turquoise) September 2022	43% of SSW customers agreed that their future bill would be affordable when considering changes proposed in the WRMP24. 72% of SSW participants found the plan to be acceptable and were particularly positive about the proposed reduction in water leakage.	59% of CAM customers agreed that their future bill would be affordable when considering changes proposed in the WRMP24. 92% of CAM participants found the plan to be acceptable.	Participants in the CAM region were significantly more likely to agree that their future bills would be affordable with the proposed changes in mind. CAM participants also were more likely to plan to be acceptable.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	In general, SSW customers prioritised keeping bills lower	In general, CAM customers prioritised a mixture of investing with maintaining bill prices	SSW customers, favoured keeping bills lower, while CAM customers sometimes sat in the midpoint between investment in attributes, and keeping customer bills low. CAM were more likely than SSW customers to be in support of investing more. For example, CAM customers were more likely to want to reduce the amount of leakage if it costs customers more, whilst more SSW customers wanted to keep customers' bills as low as possible

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC – WRMP24 - WRAP Theme 1 Research Findings (2021)	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions	The mean average acceptable bill increase for WRMP24 £70	The mean average acceptable bill increase for WRMP24 £120	The main average acceptable bill increase for WRMP24 were higher in CAM when compared with SSW.

HH vs NHH – Acceptability and affordability of WRMP24 plans

The table below summarises HH vs NHH preferences in relation to acceptability and affordability of WRMP24 plans. It appears that NHHs were more accepting of the plan than HHs, as well as thinking their future bills will be affordable.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC WRMP24 Acceptability Testing Wave 1 Report September 2022	South Staffs Water WRMP24 Acceptability testing Wave 1 report (Turquoise) September 2022	Based on the uninformed stimulus of the plan, acceptability was high at 71%. However, once informed, acceptability of the plan among HH customers decreased to 64%. Just under half (48%) of HH customers agreed that their future bill would be affordable. 66% of HH customers found the use of adaptive planning acceptable.	NHH were more accepting than HH customers based on the informed stimulus, with 83% finding it acceptable. However, once informed, NHH acceptability of the plan decreased to 72%. 60% of NHH customers overall thought that the future bill would be affordable for their organisation. 72% of NHH customers found the use of adaptive planning acceptable.	In general, NHHs were more accepting of the plan than HH customers, but once informed, acceptability dropped across both groups. NHHs were more likely, than HH customers, to think that their future bill will be affordable. A higher proportion of NHHs compared to HHs found the use of adaptive planning acceptable.

Future customers vs current customers – Acceptability and affordability of WRMP24 plans

The table below summarises future customer preferences in relation to acceptability and affordability of WRMP24 plans. Future billpayers have limited interaction with water providers and often lack responsibility for their water and bill visibility. Future billpayers exhibit higher willingness to pay (WTP) values for protecting wildlife and habitats, emphasising their concern for environmental conservation and the importance of a company's environmental credentials.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
CCW - Water Consumer Views, 2022	Water consumer views on proposed common Performance	Unspecified number of future bill payers. FBPs rarely interacted with water providers and often lived in situations with no responsibility over their water, and no visibility of the bill.	Other customers had more interaction with their provider, and were more knowledgeable about infrastructure, reinvestment, and efficiency. FBPs were less sensitive to Appearance, taste, smell of water.

	Commitments for PR24		FBPs were equally as disgusted with sewer flooding issues.
SSC Appendix E - customer research findings summary - CAM WRMP	Appendix E Customer Research Findings Summary – Cambridge Water – Water Resources Management Plan: Appendices	(Review of 16 studies, with a heavy focus on including future bill payers). Sample bases weren't robust. However higher WTP values given by future bill payers for protecting wildlife and habitats.	No differences to note
SSC Appendix A07 - PR19 data triangulation study - SSW WRMP	PR19 data triangulation study - SSW WRMP	FBPs gave noticeably higher WTP valuation for protecting wildlife and habitats, and cared more about a company's environmental credentials.	No differences to note

Vulnerable vs other customers – Acceptability and affordability of WRMP24 plans

The table below summarises vulnerable customers' preferences in relation to acceptability and affordability of WRMP24 plans. A majority of vulnerable customers, those who are on lower-income and lower-socio economic grades, did not find their current bills affordable due to the cost-of-living crisis and fear any potential sharp rises in the future. Some are also unaware that SSC investments would impact their water bill.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
CCW - Water Consumer Views, 2022	CCW - Water consumer views on proposed common Performance Commitments for PR24	In the focus group, the affordability of water was felt to be paramount to people in vulnerable financial situations. Affordability of water bills was an issue for many low-income households and although they recognise that water bills tend to be lower than other bills with some worried about potential sharp rises in the future	No notable differences.
SSC Customer Promises Tracking 2022/ 23 Annual Report	South Staffs and Cambridge Water Customer Tracking Research Report 2022/23 (Turquoise) – April 2022	Those with a total household income of under £23,000 a year were significantly less likely to agree that their water charges were affordable (66%). Many reported this was due to the cost-of-living crisis.	Three-quarters of household customers (76%) agreed that their clean water charges are affordable this year. However, 17% of those in social grades D and E were significantly more likely to disagree that their water charges are affordable.
SSC household affordability income	SSC Household Affordability Income	Most households with an income of between £16,380 to £23,000 did not find their water bill to be affordable.	71% of households with an income of between £16,380 and £23,000 agreed that

analysis - June 2022	Analysis – June 2022.		their water bill was affordable - with 14% disagreeing with the statement. In comparison, 78% of HH customers with an income of £52,001 and above, agreed their water bill is affordable.
WRE: Club Customer Engagement report	WRE: Club Customer Engagement Final Report: Combined (Blue Marble) – September 2021	The reconvened focus groups found lower socio-economic groups (C2DEs) tended to be unaware that investment choices impact their bills.	Customers in general were accepting of the idea of the best value rather than the cheapest plan. They were mostly aware that investment choices impact their bills in the focus groups, whereas lower socio-economic groups tended not to.

Stakeholders vs customers - Acceptability and affordability of WRMP24 plans

The table below summarises some of the key themes relevant to affordability and acceptability from the stakeholder consultation undertaken during the WRMP24 planning process. Stakeholders appear concerned with the idea of increasing bills, affordability and the cost of living crisis. This is in accordance with almost all customers, such as HHs, NHHs and FBPs, as the rising cost of living is a prevalent topic across all customer groups.

Evidence	Actual Report Name	Stakeholder views
WRW 2023 updated regional plan customer research	Water Resources West Regional Plan Customer Research (Shed Research Consulting) – April 2023	Stakeholders too are concerned about the cost of living and the affordability of water bills, particularly for low income and vulnerable HHs. They want these groups protected and supported during any universal metering roll-out. Stakeholders in 2022 mirrored customers' concerns about the cost-of-living crisis. Particularly worrying about the impact of bill rises on vulnerable customers.
South Staffs and Cambridge Water – Your Water Your Say	SSC YWYS Transcript FINAL	A few stakeholders voiced concerns over company profits. One stakeholder asked about financial support for customers who are struggling to afford their water bill.
appendix-b15-nhh -engagement-report-august-2022	WRE Promoting water efficiency among non-household customers: Understanding how wholesalers can motivate usage reduction (Blue Marble)	NHH Stakeholders expressed concerns about increasing prices, however, these were focused more on energy prices than water prices.
appendix-b8-south-staffs-water-stakeholder-roundtable-feedback-summary-october-2021	Stakeholder Roundtable Feedback – South Staffs Water, October 2021	Stakeholders mentioned affordability concerns when talking about demand/supply options. When prompted about affordability, one stakeholder who worked with customers with financial problems was keen for SSW to be as ambitious as possible to protect the environment and water supply - but stressed that this needs to be balanced against what customers can afford, particularly alongside increased food and energy bills. If bills do increase, stakeholders mentioned that struggling customers would need to be protected and prepared.
CCW response to the SSC draft WRMP - February 2023	CCW response to South Staffs Draft WRMP 2024	CCW is happy with golden threads, esp. that they have recognised the cost-of-living crisis as an issue.

		There is no easily accessible information regarding the likely bill impact of the plan. A single water affordability scheme is needed to make sure those most in need are protected from higher bills due to increasing environmental investment pressures.
CCW response to the Cambridge Water draft WRMP - May 2023	CCW response to Cambridge Water Draft WRMP 2024	Concerned about the cost of living now being a key issue.

10. Acceptability and affordability of PR24 plans Appendix

SSW vs CAM – Acceptability and affordability of PR24 plans

The table below summarises SSW and CAM preferences in relation to acceptability and affordability of PR24 plans. Overall, whilst both SSW and CAM participants considered the proposed bill changes to be acceptable, CAM participants appeared better positioned to afford the changes and were more accepting of the specific figures.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC PR24 Affordability and Acceptability testing - Quantitative findings 2023	SSC PR24 affordability and acceptability testing - Quantitative findings 2023 - Accent	Around 70% of SSW customers stated that the business plan was acceptable. SSW customers also gave high scores for trust and placed importance on improving water quality. 11% of SSW respondents stated that their combined future water and wastewater bill would be easy to afford, and 51% stated it would be difficult. 40% of SSW customers selected that an increase starting sooner would be preferable, with 41% stating not enough was known to make a decision	Around 70% of CAM customers stated that the business plan was acceptable. CAM customers also highly rated current good service 25% of CAM respondents stated that their combined future water and wastewater bill would be easy to afford, and 31% stated it would be difficult. 52% of CAM customers selected that an increase starting sooner would be preferable, with 32% stating that they did not have enough knowledge to make a decision.	There were no observable distinctions between the two groups in terms of their acceptability; however, trust was significantly higher in SSW customers and current good service was higher for CAM. SSW customers also placed more importance on improving water quality. Much more CAM HH and NHH believed that their future water and wastewater bills would be affordable. Significantly more CAM respondents would like the bill increase to start sooner as well
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	34% of SSW HHs stated that it was “easy” to afford their current water bills 69% of SSW NHHs stated this	38% of CAM HHs stated that it was “easy” to afford their current water bills 47% of CAM NHHs stated this	CAM customers are slightly more likely to find it easy to afford their water bills. The inverse was true of NHHs, with a higher proportion of SSW NHHs stating it was “easy” to afford their bills.

HH vs NHH – Acceptability and affordability of PR24 plans

The table below summarises HH vs NHH preferences in relation to acceptability and affordability of PR24 plans. Both HHs and NHHs have some financial concerns, and these have grown over recent years. NHHs are more likely to think that SSC offers high VFM compared to HHs, as well as one study showing NHH are more likely to find their current bills easy to afford. Another study found that ease of affording current and future water bills fluctuated between HHs and NHHs, depending on which SSC region customers were in.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Priorities Research Tracker (2023)	Accent Priorities Research Quantitative Insights – Year 3	HH customers' key concerns related to managing HH finances.	The report shows that NHH concerns are also economically rooted.	No differences. Financial concerns have escalated and become more important to both HH and NHH customers since the start of 2022.
SSC PR24 CSA Research	SSC PR24 CSA Research, 2023	59% of SSW HHs and 64% of CAM HHs felt that the company gives either good or very good value for money. 58% of HHs in CAM and 42% of SSW HHs found it easy to afford their current clean water bill. When asked about their future AMP8 bill, 24% of SSW HHs and 42% of CAM HHs thought they would be easy to afford. Most HHs were accepting of a £2.50 bill increase for a CSA.	72% of SSW NHHs and 69% of CAM NHHs felt that SSC give either good or very good value for money. 65% of NHHs in CAM and 43% of NHHs in SSW found their current clean water bill easy to afford. When asked about their future AMP8 bill, 25% of SSW NHHs and 54% of CAM NHHs thought they would be easy to afford. Most NHHs were accepting of a 1.56% increase for a CSA.	NHHs gave higher VFM scores than HH customers. The ease of being able to afford their current and future clean water bills fluctuates between HHs and NHHs depending on the region, but NHHs in CAM found it most easy to afford their current and future bills, whilst SSW HHs were the least likely to find it easy. Both HHs and NHHs were accepting overall of a bill increase to go towards a CSA.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	35% of SSC HHs and 38% of CAM HHs found it easy to afford their current water bills.	69% of SSW NHHs and 47% of CAM NHHs found it easy to afford their current water bills.	NHHs were more likely to find it easy to afford their water bills, compared to HHs.
SSC Customer Priorities Tracker - Qualitative wave 2 Research - May 2022	Priorities Research Qualitative Insights – Year 3 (Accent) – May 2022	In terms of short or long-term bill increases, most opted for what they see as a compromise of a natural bill.	In terms of short or long-term bill increases, most opted for what they see as a compromise of a natural bill.	No differences.

Future customers vs current customers – Acceptability and affordability of PR24 plans

The table below summarises future customer preferences in relation to acceptability and affordability of PR24 plans. Future customers are concerned about rising bills and the cost of living, which is something that is now evident across all customer groups. Future customers thought focusing on water quality and the environment should be the key areas of focus of SSC's PR24 plan. Whilst this is consistent with the priorities of some other customers, it appears that the environment might now be a higher priority to future customers than to other customers, in light of the aforementioned cost of living taking precedence for some other customer groups.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
SSC Young Innovators' Panel Interim Report (awaiting additional survey data)	SSC Young Innovators' Panel Interim Report (awaiting additional survey data) – Blue Marble	Future customers are concerned about rising bills. It was noted that bills feel more unpredictable than before the cost of living crisis. Water is essential, and future customers feel strongly that investments should not make bills unaffordable, and that price rises should be spread out. Future customers found SSW's PR24 business plan acceptable overall, and water quality and environmental improvements were seen as the priority areas. However, future customers were concerned about rising bills, and they wanted more detail about SSW's future plans. The research found that future customers see steady bill increases as the fairest option for society, and the majority chose this option, as it means increases are shared equally between generations, and because it is important to minimise bill shocks during the cost of living crisis.	No comparison.

Vulnerable vs other customers – Acceptability and affordability of PR24 plans

The table below summarises vulnerable customers' preferences in relation to acceptability of PR24 plan. Vulnerable customers were more likely to find the AMP8 bill very difficult or difficult to afford.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
SSC PR24 CSA Research	SSC PR24 CSA Research, 2023	Almost half of the vulnerable customers (48%) thought it would be very difficult or difficult to afford the AMP8 bill.	Compared to vulnerable customers where 48% thought it would be very difficult or difficult to afford the AMP8 bill, 35% of non-vulnerable customers felt it would be very difficult or difficult to afford the AMP8 bill.
SSC PR24 Affordability and Acceptability testing - Quantitative findings 2023	SSC PR24 affordability and acceptability testing - Quantitative findings 2023 - Accent	Individuals who belong to lower socio-economic groups, as well as those facing financial and health challenges, were more inclined to report that paying the water-only proposed bill would be difficult to pay. In terms of acceptability of the proposed bill, individuals who belong to lower socio-economic groups and struggling financially were less inclined to accept the proposed bill.	Compared to customers in the AB socio-economic group, where 25% reported finding the proposed water-only bill difficult to afford, for those in the C1C2 and DE groups, this was significantly higher at 41% and 53%, respectively at the 95% significance level. 46% of customers with health vulnerabilities reported that paying the water-only proposed bill would be difficult for them compared to 32% of customers without health vulnerabilities. Similarly, of customers who are financially struggling, 63% reported the water-only bill proposed would be difficult for them which is significantly higher compared to 21% of customers who are not financially struggling. In terms of acceptability of the proposed bill, customers in the AB socio-economic group were significantly more likely to find the proposed bill

			acceptable at 76% compared to C1C2 and DE socio-economic group at 68% of acceptability for both groups. Likewise, a significantly higher portion of customers (75%) who are not financially struggling reported the proposed bill as acceptable compared to those who are financially struggling (63%). Customers with a health vulnerability were more likely to say the proposed bill was 'not acceptable' (68%), compared to those without a health vulnerability where (74%). However, this difference is not significant.

11. Customer service Appendix

SSW vs CAM – Customer service

The table below summarises SSW and CAM preferences in relation to customer service. Overall, SSW customers have a more positive view of SSC, with higher overall satisfaction and rank SSC higher on a number of attributes e.g., helpful, reliable, good customer service.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC Customer Tracking 2022/23 Annual Report	SSC Customer Tracking 2022/23 Annual Report (Turquoise)	Overall SSW HH customer satisfaction fell 1pp (to 81%) in 2022/23 in comparison with the previous year 2021/22).10% of SSW HH customers gave the reason for their satisfaction as 'good customer service/helpful/ easy to deal with'. SSW NHH satisfaction was 87% in 2022/23. In 2021/22 SSW HH customers had an average trust rating of 8.46 on a 10-point scale, and this dropped to 8.36 in 2022/23. 28% of SSW customers sampled had contacted SSC within the past year. 7% of customers cited 'good/helpful' as a reason to trust SSC In terms of contact, 37% of SSW customers stated they'd prefer to be contacted via a leaflet sent with their water bill, 26% stated they'd prefer an email update with a link to a website, 20% stated they'd want a detailed newsletter posted to them, and 11% stated that they would prefer a text message with a website link. 79% of SSW HH customers agreed with the statement "SSC are a reliable company". 71% agreed that SSC had a good reputation. 62% agreed that SSC are easy to deal with. 65% agreed that SSC are open and honest.	Overall CAM HH customer satisfaction fell 5pps (to 77%) in 2022/23 in comparison with the previous year 2021/22). 5% of SSW HH customers gave the reason for their satisfaction as 'good customer service/helpful/easy to deal with'. CAM NHH satisfaction was 82% in 2022/23. CAM HH customers had an average trust rating of 8.06 on a 10-point scale, this has dropped to 7.59 in 2022/23. 17% of CAM customers sampled had contacted SSC within the past year. 2% of customers cited 'good/helpful' as a reason to trust SSC In terms of contact, 39% of CAM stated they'd prefer to be contacted via a leaflet sent with their water bill, 31% stated they'd prefer an email update with a link to a website, only 10% stated they'd want a detailed newsletter posted to them, and 3% stated that they would prefer a text message with a website link. 72% of CAM HH customers agreed with the statement "SSC are a reliable company". 54% agreed that SSC had a good reputation. 55% agreed that SSC are easy to deal with. 56% agreed that SSC are open and honest.	Overall HH customer satisfaction was higher in SSW compared with CAM. Similarly, more SSW HH customers cited 'good customer service/helpful/ easy to deal with', as the reason for their satisfaction. NHH satisfaction was also higher in the SSW region. SSW customers gave the company a higher average trust score in comparison with CAM customers. This difference has grown since 2022/23 in comparison with the previous year (although both regions showed a decrease in trust in comparison with the previous year). CAM customers were much less likely to have contacted the company within the last year, which may relate to the level of trust previously mentioned. More SSW customers cited 'good customer service/ helpful' as a reason to trust the company. In terms of contact, more CAM customers would prefer to be contacted via leaflet or email with a link in comparison to SSW customers. While much more SSW customers would prefer detailed newsletters and text messages with a website link in comparison with CAM customers. A higher number of SSW HHs felt that SSC was reliable, had a good reputation, was easy

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
				to deal with and are open and honest.
CCW Water Matters 2022	Water Matters: Household customers' views on their water and sewerage services 2022 (djs Research)	Note: These observations are based on a relatively small sample size. SSW customers exhibited a trust score of 7.17, higher than the national average of 7.01. 16% of customers had contacted SSC within the last year. 4% of these contacts were to complain, and 67% of customers were satisfied with how their query was handled. 59% of customers sampled agreed that the company cares about the service they provide to customers.	Note: These observations are based on a relatively small sample size. CAM customers exhibited a trust score of 7.34, higher than the national average of 7.01. 21% of customers had contacted SSC within the last year. 3% of these contacts were to complain, and 78% of customers were satisfied with how their query was handled. 58% of customers sampled agreed that the company cares about the service they provide to customers.	Note: These observations are based on a relatively small sample size. CAM customers gave a higher average trust score in comparison with SSW customers. Additionally, a greater number of CAM customers had contacted SSC within the past year. Similar numbers of these contacts were to complain, with slightly more being in SSW. More customers in CAM were satisfied with how their query was handled. An almost even percentage of customers agreed that SSC cares about the service they provide to customers, with slightly SSW customers agreeing.
SSC PR24 BAU Data (2022)	SSC PR24 BAU Data (2022)	Customer satisfaction score for contact via phone in 2022: 8.25 (lower than 8.51 in 2021) Customer satisfaction score for contact via other channels in 2022: 7.84 (lower than 8.28 in 2021)	Customer contact score via phone in 2022: 7.48 (lower than 8.36 in 2021) Customer satisfaction score for contact via other channels in 2022: 6.88 (lower than 7.11 in 2021)	SSW customers scored higher in satisfaction scores for contact via both phone and other channels in comparison to CAM. However, scores for both regions have dropped since 2021.

HH vs NHH – Customer service

The table below summarises HH vs NHH preferences in relation to customer service. Customer service is important for both HHs and NHHs, and it appears that HH satisfaction has been slightly falling in recent years (since 2017/18), whilst NHH results are more varied, but have recently been seen to increase very slightly.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Priorities Research Qual and Quant Yr 3 (2022)	Priorities Research Qualitative Insights – Year 3 (Accent) – May 2022	HH customers mentioned customer service spontaneously as a basic and expected short-term priority.	NHH customers also mentioned customer service spontaneously as a basic and expected short-term priority.	No difference.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Customer Tracking 2022/23 Annual Report	Turquoise Customer Tracking Research Annual Report 2022/23	Overall, SSC HH customer satisfaction fell by 2 percentage points to 80% compared to 2021/22. 72% of HH customers agree with the statement 'SSC are open and honest with their customers'. 77% of HHs agreed with the statement that SSC 'are a reliable company'. For HH customers, the highest scoring brand statement in 2022/23 was SSC being reliable (77%), followed by 66% agreeing they have a good reputation.	Overall, NHH satisfaction with SSC was 86%, which is a slight increase of 1pp from the 2021/22 results. However, before 2021/22 the non-household satisfaction score was more varied. The 2021/22 report shows that this 85% figure fell by a statistically significant 8pp from 2020/21, but this did follow a significant 7pp rise from 2019/20. 79% of NHH customers agree with the statement 'SSC are open and honest with their customers'. 78% of NHHs agreed with the statement that SSC 'are a reliable company'. Among non-household customers, the highest scoring brand statement in 2022/23 was SSC being reliable (78%), followed by 71% agreeing with the statement 'they have competent staff who do what they say they will do', and 70% agreeing with 'if something goes wrong, they sort it out quickly'.	HH satisfaction fell slightly, whilst NHH satisfaction increased very slightly from the previous years' results. The highest scoring brand statement for both HHs and NHHs is that SSC are reliable (with a larger proportion of NHHs than HHs voting this first). The second highest brand statement agreement for HHs was that they have a good reputation (this was fourth for NHHs, yet had a higher % agreement than for HHs).

Future customers vs current customers – Customer service

The table below summarises future customer preferences in relation to customer service. The majority of future customers, don't anticipate much interaction with their water company. They exhibit a high level of tech-savviness and a demand for proactive service from their supplier. They heavily rely on technology for accessing accounts, making payments, and receiving real-time information about water services, including updates on interruptions or changes in water pressure. All future billpayers supported SSC's aim of becoming the best-performing company in the utilities sector before 2050.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
Customer Licence Condition Research Report Final Jan 2023 (Ofwat and CCW)	Customer Licence Condition Research Report Final Jan 2023 (Ofwat and CCW - Walnut)	(11 future customers, including 18-30 non-billpayers) Most participants didn't expect much interaction with their water company, this 'if it's not broke, don't fix it' mentality (participants being generally satisfied under normal circumstances when services are	FBPs are more transactional and prefer digital channels. Instead, older participants can need more personal contact and reassurance including being able to speak to someone by telephone.

		delivered without them really noticing), was especially true for future customers who don't need to consider the billing side of supply.	
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	(91 future bill payers) Among FBPs, a majority selected deteriorations in service for three attributes, one of these being customer service – where customers were asked for their WTP for improvements in telephone wait times. (WTP per unit change from SQ was -0.36)	The more negative WTP for telephone response times points to FBPs being less concerned about needing to reach their water company by phone.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	(Qual – 6 FBPs. Quant – 82 FBPs) 40% of FBP supported SSC's ambition of wanting to be the best company in the water sector for customer service by 2030. 60% of FBPs wanted this ambition to be achieved between 2035 and 2050. All FBPs supported SSC's ambition of wanted to be the best performing company in the utilities sector before 2050.	More FBPs supported achievement of SSC being the best company in the water sector for customer services, ahead of 2030 than other customers. 27% of HH customers supported the 2030 target, alongside 30% of NHHs and 40% of FBPs. 48% of HH customers and 40% of NHH customers wanted the ambition to be achieved between 2035 and 2050, compared to 60% of FBPs. Also, all FBPs wanted SSC to become the best-performing company in the utilities sector by 2050 compared to 41% of HHs and 30% of NHHs.
SSC Customer Priorities Desk Research Report – Aug 2020	Tracking Customer Priorities Desk Review Report for SSC PLC	(Caution: Future customer sample size in the triangulation of 13 pieces of research is unclear. Findings should therefore be treated as indicative only.) FBPs reported supply reliability and great customer service to be top priorities, which was found consistently from the Foundation priorities research but the highest rated priority of all among future customers was protecting the environment.	No differences of note.

Vulnerable vs other customers – Customer service

The table below summarises vulnerable customers' preferences in relation to customer service. For vulnerable customers, proactive customer service with a personal touch was the strongest communication preference. This is likely because a more transactional approach, where efficiency is key, is regarded as unable to provide the time and reassurance needed in respect to their vulnerable circumstances, or specific needs during regular service provision and in the event of incidents. Proactive customer service seems to be more likely to build trust in SSC.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	The focus group found low-income and vulnerable customers felt that proactive customer service should be a priority.	Low-income and vulnerable customers felt that proactive customer service should be more of be a priority compared with other customers.

SSC Customer Tracking 2022/23 Annual Report	Turquoise Customer Tracking Research Annual Report 2022/23	Levels of trust in SSC among social grade DE customers was 8.52 out of 10.	Customers with an AB social grade reported lower levels of trust (average score of 7.66), compared to 8.52 amongst DE social grade.
Customer Licence Condition Research Report Final Jan 2023 (Ofwat and CCW)	Customer Licence Condition Research Report Final Jan 2023 (Ofwat and CCW - Walnut)	The online focus group found that older customers prefer more personal contact and reassurance, including being able to speak to someone by telephone when looking at preferences regarding contact type. Part of this is because customers in vulnerable circumstances have different and more specific needs, thus require an added layer of support. For example, vulnerable customers are less able to deal with incidents themselves and more prone to worry, are less confident dealing with bills, more susceptible to scammers and reticent to come forward for support due to pride.	Compared to older customers, younger participants and future customers were seen as more transactional, wanting to be informed efficiently but still with respectful service, and hence preferred digital channels such as text messages. This is partly because they are more resilient when things go wrong, feel more confident in adapting to change and can be sceptical/ lack trust in all types of companies and so are less likely to be prone to scammers.

12. Water quality Appendix

SSW vs CAM – Water quality

The table below summarises SSW and CAM preferences in relation to water quality. In general, SSW customers are more satisfied with their water quality in comparison with CAM. Both regions had different priorities in terms of water quality, with SSW focusing more on water discolouration and smell; and CAM being highly focused on the hardness of water. However, water hardness was an important issue in both regions.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
South Staffs Water Quality Metrics (2022)	South Staffs Water Quality Metrics	During the period of 2018/19 to 2021/22, 75% of SSW contacts about water quality concerned orange/brown discolouration. 47% of concerns relating to taste and smell related to chlorine, and 24% related to musty or earthy smells/tastes.	During the period of 2018/19 to 2021/22, 26% of CAM contacts about water quality concerned orange/brown discolouration. 44% of concerns relating to taste and smell related to chlorine, and 20% related to musty or earthy smells/tastes.	Significantly more contacts due to water quality during this timeframe relating to orange/brown discolouration occurred in the SSW region compared with the CAM region. Though the differences were less pronounced, the SSW region also had a higher number of taste and smell contacts relating to either chlorine or musty or earthy smells or tastes.
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	Water service contacts over the past two years from March 2022 (discolouration) and May 2022 (taste and smell): Experienced water discolouration: 13% Experienced taste and smell issues: 7%	Water service contacts over the past two years from March 2022 (discolouration) and May 2022 (taste and smell): Experienced water discolouration: 11% Experienced taste and smell issues: 11%	Water discolouration is reported on more in the SSW region, while taste and smell reports are more common in CAM.
SSC Water Hardness Triangulation Conversation (2017-2018)	SSC Water Hardness Triangulation Conversation	This was an online study of often more engaged customers. 64% of SSW customers drink tap water more often than bottled water.	This was an online study of often more engaged customers. 73% of SSW customers drink tap water more often than bottled water.	Significantly more CAM customers drink tap water instead of bottled water when compared with SSW customers. This is potentially due to the harder water in the CAM region.
H2Online (2022)	H2Online – South Staffs Water and Cambridge Water, all activities relating to water quality Jan 2020 to Sept 2022	69% of SSW customers only drank tap water. 22% of customers who filter tap water stated that this was due to water hardness, while 13% stated it was because of taste.	63% of SSW customers only drank tap water. 18% of customers who filter tap water stated that this was due to taste, while 14% stated it was because of the smell of the water.	Note: this study contained relatively small samples. More SSW customers exclusively drink tap water. In terms of reasons for filtering water, SSW customers cited water hardness more, while CAM customers were more

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
				concerned with taste and smell.
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	See comparison column	CAM showed a particularly high WTP for water taste and smell.	CAM customers tended to have a higher WTP across all water quality attributes when compared with SSW, specifically in water taste and smell.
ODI Research (2022)	Accent, Outcome Delivery Incentive Research: 2nd Pilot Report June 2022	SSW HHs showed relatively high WTP values for water taste and smell incidents	CAM NHHs showed relatively high WTP values for water taste and appearance	Note: This study involved a relatively small sample regarding CAM NHHs CAM NHHs gave much higher WTA values for water taste and appearance incidents in comparison with SSW ones. SSW HHs gave slightly higher WTA values regarding water taste and smell incidents in comparison to CAM ones.
Britainthinks: Water Club Changes of Source	Water Club: Changes of Source Full Report (Britainthinks) – June 2022	SSW customers showed high concern for the hardness of their water as well as the associated cloudiness	CAM customers showed high concern for the hardness of their water as well as the associated cloudiness	The most commonly cited water quality issue in both SSW and CAM concerned the hardness of water and its associated cloudiness.
SSC Customer Tracking 2022/23 Annual Report	Turquoise Customer Tracking Research Report 2022/23	Customers working from home solely: 51% Customers working from home most of the time: 12% SSW customers' satisfaction with the hardness of their water: 46%.	Customers working from home solely: 29% Customers working from home most of the time: 22% CAM customers' satisfaction with the hardness of their water: 31%.	Note: the context of the COVID-19 pandemic, lockdown, and home-working are relevant context to this study. Cambridge customers were significantly more likely to be working from home during 2021/22. This means more CAM customers will have been impacted by the hardness of their water at home. CAM customers were much less satisfied with their water hardness than both SSW customers and the national average.
CCW Water Matters 2022	Water Matters: Household customers' views on their water and sewerage services	SSW customers' satisfaction with the hardness/softness of their water: 72%, higher than the national average of 67%.	CAM customers' satisfaction with the hardness/softness of their water: 51%, lower than the national average of 67%.	Satisfaction with the hardness/softness of water in SSW was significantly higher than in both CAM and the national average.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
	2022 (djs Research)	Satisfaction with the safety of drinking water was 92.5%	Satisfaction with the safety of drinking water was 93%	Satisfaction with the safety of drinking water was almost identical across the two regions.
Internal analysis by SSC	Internal analysis by SSC	Internal analysis by SSC's water quality team shows that 21% of SSW customers are served by water classified as hard or very hard. With 2.6% living in areas with very hard water.	Internal analysis by SSC's water quality team shows that all CAM customers are served by water classified as hard or very hard. With 13.8% living in areas with very hard water.	Significantly more CAM customers live in regions of hard or very hard water in comparison with SSW customers.
SSC Customer Priorities Desk Research Report – Aug 2020	Tracking Customer Priorities: Desk Review Report for SSC PLC (Accent) – 8 September 2020	When ranking the importance of investment priorities, 26% of total priority was assigned to water being safe to drink.	When ranking the importance of investment priorities, 24% of total priority was assigned to water being safe to drink.	SSW customers saw water being safe to drink as slightly more important (26%) when compared to CAM (24%) when ranking the importance of investment priorities.

HH vs NHH – Water quality

The table below summarises HH vs NHH preferences in relation to water quality. HH customers' priorities tended to revolve mostly around ensuring that their water was perceived as safe to drink and use, with NHH customers giving even priority towards most water quality attributes. Water quality issues tend to be slightly more prevalent and impactful to NHHs than HHs.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC ODI segmentation analysis 2023	Collaborative ODI Research: Segmentation Analysis of South Staffs and Cambridge Water Results (Accent and PJM economics)	The national average (YTD May 2022) is 11% of HHs experience discolouration of water from their taps, whilst 9% experienced taste and/or smell issues with their tap water in the last 12 months prior to May 2022. Do not drink and boil water notices are relatively rare for customers, with only 11% of HH having received boil water instructions over the past 12 months, and 5% of HH customers having received do not drink notices. When given a list of potential disruptive scenarios involving water quality, HH customers did not consider boil water or do not drink notices to be in their top 4 impactful scenarios, although the top 2 areas with the highest impact scores were related to sewer flooding given it was	The national average (YTD May 2022) is 19% of NHHs experience discolouration of water from their taps, whilst 16% experienced taste and/or smell issues with their tap water in the last 12 months prior to May 2022. Do not drink and boil water notices are relatively rare for customers, with only 8% of NHH customers having received boil water instructions over the past 12 months, and 11% of NHH customers having received do not drink notices. NHH customers considered a do not drink notice of 48 hours to be the second most impactful scenario listed	NHHs appear more likely to experience discolouration of water from their taps, and taste/ smell issues, than HH customers. Do not drink and boil water notices are relatively rare for both HHs and NHHs customers. It seems like do not drink notices are more impactful to NHHs than HHs when given a list of potential disruptive scenarios involving water quality.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
		a combined water and wastewater research project.	when looking at the relative impact of each service issue.	
SSC Customer Priorities Desk Research Report – Aug 2020	Tracking Customer Priorities: Desk Review Report for SSC PLC (Accent) – 8 September 2020	In terms of water quality, HH customers focused on water safety. HH customers see water being safe to drink as a top service and investment priority.	NHH customers focused on a broader range of water quality aspects including water discolouration, taste and smell. NHH customers saw water being safe to drink as a priority, but they considered it to be of equal priority to water taste and smell, lead piping, renewables, discolouration, and water hardness.	Whilst HH customers focused more on water safety, NHH customers focused on a broader range of water quality aspects including water discolouration, taste and smell.
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	In the stated preferential data for customers' WTP for improvements in SSC services, HHs have a focus on high water quality over other water attributes. HH customers largely showed a WTP for most attributes, however, these were dictated by an array of geographic and personal factors.	NHH sample showed a general preference across all attributes in the stated preferential data for customers' WTP for improvements. There was a general WTP across all NHH customers for all water attribute improvements.	HH customers had more of a focus on water quality than NHHs in the WTP data. The data shows a general WTP across all NHH customers for all water attribute improvements, with HH customers largely showing the same, however, these were dictated by an array of geographic and personal factors.
SSC Customer Tracking 2022/23 Annual Report	SSC Customer Tracking 2022/23 Annual Report	Despite the inclusion of "the impacts of hard water" option, thereby increasing the number of reported service issues, overall satisfaction with the service provided was still high (80% for households). When looking at scores from previous years, there has been little change regarding how HH customers feel about the hardness of their water, with around 40% satisfaction in the 2022/2023 period, compared with 42% from the previous period. However, this masks the observation that there was a significant rise in dissatisfaction with the hardness/softness of water between 2021/22 and 2022/23 (37% dissatisfied v 24% previously).	Despite the inclusion of "the impacts of hard water" option, thereby increasing the number of reported service issues, overall satisfaction with services was high (86% for non-households).	Overall service satisfaction was high for both HH and NHHs.
SSC Willingness-to-pay Research (2018)	Impact Research, Willingness-to-Pay research to support PR19 Technical Report June 2018	There was a willingness to pay up to a maximum of an extra £9.66 for larger water hardness improvements in SSW HHs, and £7.63 in CAM HHs.	SSW NHHs gave a maximum of a 3.3% increase, and CAM NHHs giving a 3.5% increase.	Both HHs and NHHs were willing to pay for improvements related to water hardness. However, the numbers are difficult to compare, as presented in different units.

Future customers vs current customers – Water quality

The table below summarises future customer preferences in relation to water quality. Among future billpayers, there is a preference for improvements in services related to hard water supply and lead pipes. In the SSW region, future billpayers show less preference for improvements. In CAM, future billpayers prioritise more improvements, including hard water supply and lead pipes. Overall, future billpayers are generally surprised that more people aren't concerned about water quality post-transfer, especially if it comes at a higher cost. They strongly support investing in environmental improvements, with consistent emphasis on water quality. Future billpayers have specific ambitions for improving drinking water quality and lead pipe removal, with a preference for spreading replacement costs across all customers. Whist still an important area to address, lead pipe removal is considered a lower priority among future customers.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	(91 future bill payers) FBPs showed a preference for improvements in the services of: hard water supply, lead pipes, chance of property flooding from a burst pipe, and supporting nature and wildlife. At the same time, they were less concerned with customer service, unplanned short interruptions to the water supply, and risk of temporary use bans. FBPs in the SSW region were particularly less likely to show any preference for improvements, including water quality improvements with the exception of smart meter installation. However, this may be due to a low existing rollout of smart meters in this region). In the SSW region, FBPs were WTP for a smart water installation and hard water supply. Half chose investment options relating to supporting nature and wildlife. Deterioration options (a decrease in service quality in exchange for cheaper bills) were chosen for customer service, do not drink notices, issues with tap water colour, taste, or smell, low water pressure, unplanned interruptions to water supply, and risk of temporary use bans. CAM FBPs chose more improvements (hard water supply, supporting nature and wildlife, lead pipes and chance of property flooding from burst pipes). Note that women were overrepresented in this sample.	Comparisons are speculative, due to a small total future bill payer sample size. The positive WTP preferences of FBPs were similar to that of HH customers, with hard water supply, lead pipes, chance of properties flooding, and supporting wildlife and nature being preferred by HH customers as well as FBPs. However, HHs additionally showed a preference for not experiencing temporary do not drink notices, issues with tap water colour, taste, and smell, and prompt customer service by phone, which FBPs did not.
SSC WRAP Deep Dives Report	South Staffs and Cambridge Water: Findings from the WRAP (Water Resources Advisory Panel) DEEP DIVES on universal	(15 future bill payers) Some FBPs were surprised that more people were not concerned about the quality of the water they would be received post water transfer, especially if they were paying more to receive it.	Views concerning surprise about a lack of concern with the quality of water post-water transfer seemed to be common place within the sample group, both among future customers and the rest of the sample.

	metering and water transfers (Community Research) – November 2021		
CCW Public views of the water environment report	Public views on the water environment July 2021 (Community Research)	(18 future bill payers) Almost all FBPs were in favour of investing in all environmental improvements. Water quality was consistently rated highly by almost all future customers.	FBPs were likely to prioritise the environment much more than current customers, likely due to future customers having a larger stake in the environmental consequences of water companies when compared to current customers. FBPs were less likely to suggest that water companies should just focus on their core business/central remit than current customers. FBPs were in favour of paying for all environmental actions, while other customers were generally in favour of paying for a select few. Views on water quality were fairly similar to other customers, with water quality being consistently rated the highest ranked priority.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	(Qual – 6 FBPs. Quant – 82 FBPs) FBPs wanted the ambition 'to reduce the number of customers raising an issue about their drinking water (specifically, to reduce contacts about the taste and smell of drinking water from 1.6 to 0.75 by 2050 per 10,000 properties per year)', to be achieved by 2050. When looking at lead pipe removal data, 78% of FBPs wanted the ambition (to remove all lead pipes by 2050) to be achieved before 2005, but a lower proportion wanted the ambition to be achieved by 2035. There was a strong preference amongst FBPs for the costs of replacement to be spread across all customers rather than just those who still have lead supply pipes. Future customers in the quantitative survey had lead pipe removal as their lowest priority though.	Drinking water: Close to two-thirds of participants across the research wanted this ambition to be achieved ahead of SSC's target of 2050, but both NHHs and FBPS were slightly more likely to want the ambition to be achieved before 2050 (exact numbers unavailable). Lead pipes: Close to two-thirds of the participants across the research wanted this ambition to be achieved before the 2050 target, whereas a larger proportion of NHHs (63%), and even more FBPs (78%) wanted this ambition to be achieved before 2050. However, a lower proportion of both FBPs and NHHs wanted this ambition reached by 2035. Both HH and FBPs showed a preference for the costs of replacement to be spread across all customers, whilst NHHs displayed a preference for the customers who have a lead supply pipe to pay the majority of replacement costs.

Vulnerable vs other customers – Water quality

The table below summarises vulnerable customers' preferences in relation to water quality. Vulnerable customers showed lower WTP than non-vulnerable customers, particularly from the CAM region. This different, however, was not significant.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	Those who were financially or socially vulnerable in the CAM region reported lower WTP across the different water attributes for improvement than the CAM average although this was not statistically significant.	Compared to non-vulnerable customers, both NHH and HH customers reported a higher levels of WTP across all water attribute improvements.

13. Supplier reliability Appendix

SSW vs CAM – Supplier reliability

The table below summarises SSW and CAM preferences in relation to supply reliability. On average, there were very few differences between regions in this area. Despite this, CAM customers often showed a stronger concern for pipe leakages and repairs compared to SSW customers.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC WRMP Themes 1 and 3 Quant insights - Mar 2022	SSC WRMP Themes 1 & 3: Managing Droughts, Leakage Ambition, Universal Metering, Environmental Ambition – Quantitative Insights (Accent) – April 2022	16% of SSW customers had experienced low water pressure over the last two to three years.	19% of CAM customers had experienced low water pressure over the last two to three years.	Slightly more CAM customers had experienced low water pressure over the last two to three years. The same percentage of customers from SSW and CAM regions had experienced flooding from a burst pipe.
SSC Customer Tracking Report (2022/2023)	Customer Tracking Research Report 2022/23	19% of SSW customers had experienced low water pressure over the last two to three years. 14% of SSW customers had experienced temporary loss of water supply for more than an hour over the same time frame. 83% of SSW HH customers reported that they were satisfied with their water pressure. 93% stated they were satisfied with their reliability of supply.	18% of CAM customers had experienced low water pressure over the last two to three years. 15% of CAM customers had experienced temporary loss of water supply for more than an hour over the same time frame. 81% of CAM HH customers reported that they were satisfied with their water pressure. 96% stated they were satisfied with their reliability of supply.	Similar percentages of SSW and CAM customers experienced low water pressure and temporary loss of water supply for more than an hour over the last two to three years. The proportion of SSW customers reporting that they were satisfied with their water pressure is similar to that of CAM. Slightly more CAM customers stated they were satisfied with their reliability of supply in comparison with SSW. No significant differences were found between SSW and CAM for water pressure priority ranking.
CCW Water Matters 2022	Water Matters: Household customers' views on their water and sewerage services 2022 (djs Research)	Compared with the industry average of 88%, 87% of SSW customers were satisfied with their water pressure. Compared with the industry average of 95%, 99% of SSW customers were satisfied with the reliability of water supply.	Compared with the industry average of 88%, 92% of CAM customers were satisfied with their water pressure. Compared with the industry average of 95%, 97% of CAM customers were satisfied with the reliability of water supply.	The proportion of CAM and SSW customers satisfied with their water pressure is similar. Slightly more SSW customers were satisfied with their reliability of water supply in comparison to SSW customers.

Evidence	Actual Report Name	SSW	CAM	SSW vs CAM
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	SSW HH customers are willing to pay £0.16 per unit reduction in the flooding incidents per year. While NHH were willing to pay an extra 0.002% more on their bill. However, C2DE HH customers were not willing to pay anything for this.	CAM HH customers are willing to pay £1.03 per unit reduction in the flooding incidents per year. While NHH were willing to pay an extra 0.005% more on their bill. C2DE HH customers were willing to pay an extra 9p.	Cambridge customers on average were willing to pay more for reduction in flooding incidents. This extends to both NHH customers as well as those in SEG bands C2DE.

HH vs NHH – Supplier reliability

The table below summarises HH vs NHH preferences in relation to supply reliability. Both HHs and NHHs have been seen to be satisfied with the reliability of their water, with NHHs displaying a higher satisfaction rate than HHs. HH and NHH customers tend to be aligned on supply reliability attributes, however NHHs are more in favour of SSC achieving their supply interruption ambition before 2050.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Customer Tracking Report 2022/23	Customer Tracking Research Report 2022/23	82% of HHs were satisfied with their water pressure. 94% were satisfied with the reliability of their water. Between 2015 and 2023 satisfaction scores ranged between 4.56-4.73 on average, indicating a relatively high level of satisfaction overall. Compared to 2021/22, in 2022/23, satisfaction score for supply reliability jumped from 4.56 to 4.70. This is going against the downward trend suggested based on 2019-2022 data.	89% of NHHs were satisfied with their water pressure. 98% were satisfied with the reliability of their water. NHH customer satisfaction with the reliability of water supply in 2022/23 was the highest scoring service area measure, with satisfaction ranging between 4.62- 4.82, with the highest score for supply reliability being 2022/23 at 4.82. This was a significant jump from the previous year of 4.68	HHs and NHHs were both satisfied with the water pressure and reliability, with higher percentages seen amongst NHHs than HHs. Satisfaction for supply reliability has recently risen for both HHs and NHHs.
SSC Priorities Research Qual and Quant Year 3 (2022)	Priorities Research Qualitative and Quantitative Insights – year 3	When asked about spontaneous short-term priorities, HH customers mentioned water pressure under the category of quality of water / hardness. This was driven by the need to improve water pressure in the shower for HHs.	When asked about spontaneous short-term priorities, NHH customers mentioned water pressure under the category of quality of water/ hardness.	No differences.
SSC NERA WTP Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	There was no WTP for improving the experience of low water pressure – described as lasting up to 6 hours in this study, or for reducing the percentage of properties experiencing a short interruption per year, as the model returned negative values.	There was no WTP for improving the experience of low water pressure – described as lasting up to 6 hours in this study, or for reducing the percentage of properties experiencing a short interruption per year,	No differences. Both HHs and NHHs are WTP for improvements to reduce the chance of property flooding from a burst pipe.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
		HHs were WTP for improvements to reduce the chance of property flooding from a burst pipe. SSW HHs are WTP £0.16 and CAM HHs £1.03 per unit reduction in the flooding incidents per year.	as the model returned negative values. NHHs were WTP for improvements to reduce the chance of property flooding from a burst pipe. SSW NHHs are WTP 0.002% more of their current bill and 0.005% in CAM to reduce the change of property being flooded due to a burst pipe.	
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	HH customers felt the supply interruption ambition to reduce the average time a property is without a water supply from 2:44 minutes (current) to under 1 minute by 2050 was less important as SSC are already performing well in this area. 52% of HH customers would like to see the supply interruption ambition achieved before the company target of 2050.	NHH customers also felt the supply interruption ambition to reduce the average time a property is without a water supply from 2:44 minutes (current) to under 1 minute by 2050 was less important as SSC are already performing well in this area. However, NHH did rank supply interruptions higher in the quantitative survey as the second highest priority – often citing their organisation's reliance on water. Over half of NHHs (69%) would like to see the supply interruption ambition being achieved before the company target of 2050	NHHs were more in favour than HHs of SSC achieving the supply interruption ambition before 2050.

Future customers vs current customers – Supplier reliability

The table below summarises future customer preferences in relation to water quality. Future billpayers emphasise supply reliability, along with excellent customer service, as a top priority. Future billpayers exhibit a high level of tech-savviness and a demand for proactive service. They heavily rely on technology for accessing accounts, making payments, and receiving real-time information about water services, including updates on interruptions or changes in water pressure. Future billpayers also recognise the importance of investing in infrastructure to prevent future supply disruptions and associated cost increases due to climate change impacts. Reducing the 'chance of a property flooding from a burst pipe' is one of four areas future billpayers would like SSC to focus investment on. Conversely, 'unplanned short interruptions to the water supply' is one of three areas for which they would accept some deterioration in service (of which the other two are unrelated to supply reliability). SSC's target of reducing the average time without water supply is supported by future billpayers, with a preference for achieving this ambition before 2050.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base

SSC Customer Priorities Desk Research Report – Aug 2020	Tracking Customer Priorities Desk Review Report for SSC PLC	(Caution: Future customer sample size in the triangulation of 13 pieces of research is unclear. Findings should therefore be treated as indicative only.) PR19 foundational research found key uniformed priorities were consistent across all customer groups i.e., household and non-household customers including hard-to-reach and FBPs. These included continuity of supply, quality of water, investment to maintain and improve infrastructure and more. FBPs reported supply reliability and great customer service to be top priorities, which was found consistently from the Foundation research but the highest rated priority of all among future customers was protecting the environment.	No differences of note.
PR19 Foundation Research (2017)	Foundation Research Qualitative findings – Full Report	(Caution: Future customer sample size of 8 is low. Findings should therefore be treated as indicative only.) FBPs were found to be highly tech-savvy and generally demanded high service levels with a proactive approach. They showed heavy reliance on technology for instant access of not just accounts and payment, but information as well. Although not mentioned specifically, these could include faster and live updates on any interruptions or changes to water pressure. FBPs also felt that if investments in infrastructure aren't made now which would help reduce supply interruptions and protect future supply, they would be the ones "stung" by the future charges as a consequence of poor preparation of infrastructure as climate change worsens.	Compared to customers in different stages of their life, FBPs and those in the pre-family stage were found to be waste oblivious as they felt water to be an easily renewable source and because it is not something they monitor as much compared to shared households and those responsible for bills.
SSC NERA WTP for Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	(96 future bill payers) FBPs have an appetite for improvement in some, but not all seven attributes explored with 3 attributes relating to supply reliability: • Low water Pressure • Change of Property flooding from a burst pipe • Unplanned short interruptions to water supply Most FBPs selected improvements in service for four attributes with only 'Change of property flooding from a burst pipe' being the attribute related to supply reliability. Majority of FBPs were happy to see some deterioration in the service level for three attributes with 'unplanned short	Across all groups, NHH, HH and FBPs, evidence was found for WTP for improvements in four attributes including change of property flooding from a burst pipe. In other words, in the choice exercise, reducing the chance of property flooding was an area all customers wanted to see improvements on and were also WTP to see these improvements. However, it is important to note for FBPs, the results for the positive WTP value were not significant at the 95% level, possibly as a consequence of the small sample size. FBPs were more likely to deviate from the status quo than HH, either citing improvements or deterioration in the seven different attributes rather than sticking to the current level of performance. Among future bill payers, there

		interruptions to the water supply' being the only attribute related to supply reliability.	was a majority preference for either improvement or deterioration for seven attributes, whereas this was only the case among HH customers for four attributes.
SSC PR24 LTDS Research Presentation, Turquoise for SSC, July 2023	Turquoise SSC PR24 LTDS Research Presentation July 2023	(Qual – 6 FBPs. Quant – 82 FBPs) SSC's target is to reduce the average time a property is without a water supply from 2:44 minutes (current) to under 1 minute by 2050. 72% of FBPs wanted this ambition to be achieved before 2050.	A larger proportion of FBPs wanted this target to be achieved before 2050 compared to other HH customers. 52% of HH customers compared to 72% of FBPs wanted this target to be achieved before 2050.

Vulnerable vs other customers – Supplier reliability

The table below summarises vulnerable customers' preferences in relation to supply reliability. Financially vulnerable customers were not willing to pay for *reducing the chances of property flooding from a burst pipe* compared to non-vulnerable customers. However, there may be variation in need and priority between different vulnerability groups as socially vulnerable customers, defined as having serious illness, a disability and on the PSR. These customers had a higher WTP than HH customers overall on this measure.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
SSC NERA WTP Water Services at PR24 2022	NERA Willingness to Pay for Water Services at PR24	Customers who were financially vulnerable and in the C2DE socioeconomic group were not willing to pay to reduce the chances of property flooding from a burst pipe. In the SSW region, C2DE customers were not WTP whilst in the CAM region C2DE customers were WTP. However, it is important to note this difference is not statistically significant at the five per cent level.	Socially vulnerable customers, defined as having a serious illness, or a disability and on the PSR, in both regions, reported a similar WTP (£0.20) to HH customers overall (£0.16), for reducing the chance of property flooding from a burst pipe.

14. Communities Appendix

SSW vs CAM – Communities

The table below summarises SSW and CAM preferences in relation to SSC's involvement in the community. Overall, SSW and CAM differed on a number of community-related areas. More SSW customers were registered with the PSR, while CAM customers were more environmentally focused in comparison, with greater care over water usage and greater support for natural green and blue spaces.

In-text reference	Evidence	SSW	CAM	SSW vs CAM
SSC Customer Tracking 2022/23	Customer Tracking Research	8% of HH customers indicated that a member of their household was registered on the PSR	5% of HH customers indicated that a member of their household was registered on the PSR. This was slightly less than in the year prior in 2021	A higher proportion of HH customers in the SSW region indicated that a household member was registered on the PSR than in the CAM region
H2Online – South Staffs Water and Cambridge Water Monthly Report - August 2022	H2Online – South Staffs Water and Cambridge Water Monthly Report - August 2022. Explain	Note: Sample sizes in this study are small with a base of 129 in SSW Asked SSC customers which out of a predetermined list they would like to see SSC support. 19% of this region stated that they supported investment into wetlands/river habits. 53% supported investment into garden space for community/people use. 24% supported investment into wildlife habitats.	Note: Sample sizes in this study are small with a base of 92 in CAM. Asked SSC customers which out of a predetermined list they would like to see SSC support. 52% of this region stated that they supported investment into wetlands/river habits. 17% supported investment into garden space for community/people use. 26% supported investment into wildlife habitats.	Note: Sample sizes in this study are small with a base of 129 in SSW and 92 in CAM. Question wording varied by region; however, it covered the same overall themes. SSW customers showed stronger support for garden spaces, while CAM customers showed stronger support for wetland/river habitats instead. Roughly equal support was given to wildlife habitats across both regions; however this option was not favoured anywhere near as much as the respective top option per community.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	20/22 panellists ranked environmental protection as important or very important. 11 stated that they had visited natural blue spaces within the previous month.	24/25 panellists ranked environmental protection as important or very important. 17 stated that they had visited natural blue spaces within the previous month.	Panellists in both regions showed a high degree of care towards the environment. CAM panellists were more likely to say they had visited natural blue spaces.
Accent Theme 2 MCDA WRMP24	SSC Accent Quant MCDA Study	58% of SSW customers surveyed stated they had visited a natural blue space within the previous month. 63% stated that protecting lakes, reservoirs, fish, and other aquatic plants and wildlife was really important.	65% of CAM customers surveyed stated they had visited a natural blue space within the previous month. 70% stated that protecting lakes, reservoirs, fish, and other aquatic plants and wildlife was really important.	More CAM participants showed a high degree of care towards the environment in comparison to SSW customers. Similarly, more SSW customers stated that they do not think much about

In-text reference	Evidence	SSW	CAM	SSW vs CAM
		20% of online panellists stated that they do not think much about saving water and instead take it for granted.	17% of online panellists stated that they do not think much about saving water and instead take it for granted.	saving water and take it for granted.
SSC Social Tariffs Research 2023	SSC Social Tariffs Research 2023 - Qa Research	58% of SSW customers found it acceptable to pay an extra £7 per year on top of their own bills in order to help those who are struggling to pay their own. 55% would support this if it were £8 per year.	71% of CAM customers found it acceptable to pay an extra £7 per year on top of their own bills in order to help those who are struggling to pay their own. 68% would support this if it were £8 per year.	CAM customers showed a higher willingness to pay to support those in need of help with water bills (and would pay an extra amount on top of their existing bill to fund this).

HH vs NHH – Communities

The table below summarises HH vs NHH preferences in relation to SSC's involvement in the community. A lot of work related to communities only captured HH views, but from the evidence we do have available, it appears that HH customers are more likely to think that SSC works to support the local community, compared to NHHs.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
SSC Customer Tracking 2022/23 Annual Report	Customer Tracking Research	39% of HH customers felt SSC is a company that puts its customers' needs first over its shareholders and actively works to support the local community it serves.	17% of NHH customers felt SSC is a company that puts its customers' needs first over its shareholders and actively works to support the local community it serves.	HHs were more likely to think that SSC puts its customer's needs first and actively works to support the local community, compared to NHHs.
Priorities Household tracker Year 3 quantitative insights	3410PRE07_YEAR 3 QUANT INSIGHTS_V14	Education on water usage was a short-term spontaneous priority for HH customers and also when looking from a wider community perspective.	Education on water usage was a short-term spontaneous priority for NHH customers and also when looking from a wider community perspective.	Education on water usage was a short-term spontaneous priority for both HH and NHH customers.

Future customers vs current customers – Communities

The table below summarises future customer preferences in relation to SSC's involvement in the community. The information on future billpayers within this topic was relatively sparse, however, in a similar fashion to previous topics, finance and the cost-of-living crisis was a top-of-mind priority for future billpayers, ranking even higher than environmental issues related to local green spaces. Future billpayers saw education programmes as the best way to engage with their own age group concerning water saving.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base

SSC Young Innovators' Panel	SSC Young Innovators' Panel Interim report (awaiting additional survey data) 15th August 2023	Financial concerns were more on top of mind for this age group – and real – than previously observed due to the cost-of-living crisis than environmental factors as future customers were slightly more energy conscious than water conscious. Educational programmes were seen as the best way to engage this age group about water saving.	No notable differences.

Vulnerable vs other customers – Communities

The table below summarises vulnerable customers' preferences in relation to Communities. Several areas are identified as increasing the vulnerability of ethnic minorities, such as a knowledge gap on bills and services (many rent and do not have direct interaction with suppliers), being in less secure employment, having previously experienced racism or xenophobia or traditional gender role pushback.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
Southern Water – Affordability Concern and Diverse Culture Research	Southern Water – Affordability Concern and Diverse Culture Research Full Report – April 2021	Several areas were identified as increasing the vulnerability of ethnic monitories. Customers from ethnic communities are more likely to practice traditional gender roles at home, often resulting in women being less experienced in dealing with bills and communicating with suppliers, resulting in a knowledge gap and lower overall confidence in this area. Customers from ethnic communities are often less experienced with managing and paying due to a history of renting and landlords taking care of bills and therefore are likely to have gaps in their knowledge. Customers from ethnic communities are also more likely to be in less secure employment resulting in a less reliable income. Past and current experiences with racism and xenophobia lead to concerns about being treated fairly or needs not being met when reaching out to supplier.	Some customers from socio-economic groups C1C2DE report visiting lakes, rivers and reservoirs in their community for recreational purposes, although the proportion is lower than customers overall.
WRMP24 Theme 2 Accent Study	SSC WRMP: MCDA Quantitative Insights	59% of customers from the C1C2 economic group and 48% from the DE socioeconomic group reported visiting rivers, lakes, or reservoirs in their area for recreational purposes.	60% of customers in general reported visiting rivers, lakes, or reservoirs in their area for recreational purposes.

15. Net Zero Appendix

SSW vs CAM – Net Zero

The table below summarises SSW and CAM preferences in relation to carbon Net Zero. In general, CAM customers showed greater support for net zero and greater concern for climate change. However, in some samples there was only a minor difference between regions, with other studies showing no regional difference at all. CAM customers additionally were more sceptical about reaching net zero targets in comparison with SSC customers.

In-text reference	Evidence	SSW	CAM	SSW vs CAM
H2Online Community web review – Carbon Net Zero Customer Insights	Carbon Net Zero 2030 roadmap – webpage review H2Online Community Activity Feedback	56% of SSW customers surveyed supported Water UK's net zero by 2030 target, stating that it is a needed target.	55% of CAM customers surveyed supported Water UK's net zero by 2030 target, stating that it is a needed target.	SSW and CAM customers showed similar opinions in this area.
WRMP24 Theme 2 Accent Study	SSC WRMP: MCDA Quantitative Insights	SSW customers scored a mean average of 7.1 on a 10-point scale on how concerned they were about the impact of climate change on the natural environment in their area.	CAM customers scored a mean average of 7.8 on a 10-point scale on how concerned they were about the impact of climate change on the natural environment in their area.	On average, more CAM residents were concerned with the impact of climate change on the natural environment in their area.
SSC Young Innovators Panel	Young Innovators' Panel Interim Report (unpublished)	See comparison column	See comparison column	When asked if they favoured "doing more to reduce the company's carbon footprint, even if it costs customers more" or the same question while "keeping customer bills as low as possible", there was no significant difference between SSW and CAM customers.
SSC WRMP24 - WRAP Theme 1 research findings	Findings from the WRAP's (Water Resources Advisory Panel) Theme: Strategic Decisions (Community Research) – August 2021	SSW customers considered investment into environmental/ sustainability issues as a moderately high priority	CAM customers considered investment into environmental / sustainability issues as a high priority	CAM customers consistently rated concern for environmental/sustainability issues as a higher priority in comparison with SSW. However, this was not a significant difference.
WRMP24 Theme 2 Accent Study	SSC WRMP: MCDA Quantitative Insights	SSW customers who struggled to pay household bills had lower valuations for flood risk and carbon emissions than those who always paid bills on time	SSW customers who struggled to pay household bills had lower valuations for flood risk, human and social wellbeing, and habitats for native wildlife and plants	While reducing carbon emissions often attracted notably higher WTP valuations from customers in both regions, these were particularly higher in the CAM region.

In-text reference	Evidence	SSW	CAM	SSW vs CAM
			than those who always paid bills on time	
Customer Promises Tracker	Turquoise Customer Tracking Research Annual Report 2022/23	45% of SSW in general agreed with brand statement: SSC are environmentally focused and do a good job at helping to protect the environment in the areas they take water from	41% of CAM in general agreed with brand statement: SSC are environmentally focused and do a good job at helping to protect the environment in the areas they take water from	The SSW and CAM did not differ significantly in agreement with brand statements relating to the environment. However they did differ slightly in their level of agreement that SSC is environmentally focused and does a good job at helping to protect the environment in the areas they take water from. For this statement, the level of agreement was slightly higher for SSW than CAM.
H2Online Community - Carbon Net Zero Customer Insights	Carbon Net Zero 2030 roadmap – H2Online Community Activity Feedback	56% of participants supported the goal of SSC reaching net zero by 2030, however, 21% showed scepticism as to whether these targets could be reached in time.	55% of participants supported the goal of SSC reaching net zero by 2030, however, 27% showed scepticism as to whether these targets could be reached in time.	Note: this study contained a relatively small sample size. SSW and CAM customers showed similar opinions in this area. However, a higher proportion of CAM customers were sceptical about meeting the target of SSC reaching net zero by 2030.
Explain Net Zero Citizen Jury	Explain's South Staffs Water and Cambridge Water Net Zero Citizen Jury	Relating to discussions around off-setting or in-setting of carbon. Jurors from the SSW region tended to prefer the idea of SSC developing its own scheme targeted at local communities.	Relating to discussions around off-setting or in-setting of carbon. Jurors from the CAM region tended to prefer the idea of SSC working with other water companies to develop a bespoke scheme (offsetting and/or in-setting).	SSW customers tended to prefer the idea of SSC developing its own carbon off-setting/in-setting scheme, while CAM customers preferred the idea of working with other water companies to achieve off-setting/in-setting targets.
H2Online Community web review – Carbon Net Zero Customer Insights	Carbon Net Zero 2030 roadmap – webpage review H2Online Community Activity Feedback	70% of SSW customers thought the SSC webpage on net zero was good, with 22% saying it was excellent. 4% stated it was poor.	71% of CAM customers thought the SSC webpage on net zero was good, with 29% saying it was excellent	Note: this study contained a relatively small sample size. Equal percentages of SSW and CAM customers thought the webpage was good, while slightly more CAM customers thought it was excellent.

HH vs NHH – Net Zero

The table below summarises HH vs NHH preferences in relation to Net Zero. Research shows that NHHs rank achieving net zero carbon as a higher priority than HHs, and are also more likely to agree that SSC is environmentally focused. However, NHHs were less ambition than HHs in regards to timings of reaching net zero, with HHs more in favour of SSC performing ahead of their targets.

Evidence	Actual Report Name	HHs	NHHs	HHs vs NHHs
LTDS Report	Turquoise SSC PR24 LTDS Research Presentation July 2023	HH customers were asked to rank 10 ambitions in order of priority, and 'Achieving net zero carbon' was ranked 9th in the qualitative workshops, and 10th in the online survey. 27% of HHs supported SSC's target to have net zero carbon emissions from company operations by 2030. 34% of HHs wanted this ambition to be achieved between 2035 and 2045. 45% of HHs wanted net zero greenhouse gas emissions across all operations to be achieved before 2050, whilst 43% wanted SSC to achieve this ambition on target by 2050.	NHH customers ranked 'Achieving net zero carbon' as their third highest priority in the survey. 20% of NHHs supported SSC's target to have net zero carbon emissions from company operations by 2030. 20% of NHHs wanted this ambition to be achieved between 2035 and 2045. 30% of NHHs wanted SSC to achieve net zero greenhouse gas emissions across all operations before 2050, whilst 60% of NHHs voted in 2050.	NHHs ranked achieving net zero carbon higher in the survey, when compared to HH customers. This is likely linked to the fact many businesses have or are embarking on their own Net Zero journeys. NHHs were less ambitious than HHs in terms of timings when it comes to SSC reaching net zero greenhouse gas emissions, with HHs more in favour of SSC achieving this ahead their targets.
Customer Promises Tracker	Turquoise Customer Tracking Research Annual Report 2022/23	44% of HH customers agree that SSC is "environmentally focused and do a good job at helping to protect the environment in the areas they take water from". The same proportion of HH customers (44%) agreed that SSC is "an environmentally sustainable business".	51% of NHH customers agree that SSC is "environmentally focused and do a good job at helping to protect the environment in the areas they take water from". 43% of NHHs agreed that SSC is "an environmentally sustainable business".	NHH customers were slightly more likely than HHs to be in agreement with the statement that SSC is "environmentally focused and do a good job at helping to protect the environment in the areas they take water from". Similar proportions of HHs and NHHs agreed that SSC is "an environmentally sustainable business".

Future customers vs current customers – Net Zero

The table below summarises future customer preferences in relation to Net Zero. Younger customers tend to show high concern for the environment and expressed a stronger desire for Net Zero before 2050 in comparison to other customers. Despite this, older customers tend to display more concrete actions to prevent climate change compared with younger ones. In future billpayers specifically, concern for climate change issues tended to take a backseat to monetary issues such as the cost-of-living crisis. Many engage in smaller environmentally-friendly behaviours, however, few take larger-scale action. Additionally, knowledge of the utilities sector among these groups is generally low.

Evidence	Actual Report Name	Future Customers	Comparison with household bill-paying customer base
Blue Marble – Communicating with the public about climate change	Blue Marble – Communicating with the public about climate change	While younger people do often care about the environment, this study found that older groups tend to take more actions in the interest of preventing climate change in comparison to younger groups.	No notable insights.
Carbon Next Zero Customer Insights	Carbon Next Zero Customer Insights	Younger customers including FBPs regarded water efficiency as a high priority	No notable insights.
LTDS Report	Turquoise SSC PR24 LTDS Research Presentation July 2023	(6 future billpayers from SSW area involved in workshops, 53 SSW and 29 CAM in quantitative survey) Future customers and NHH ranked achieving net zero carbon higher in the quantitative survey than HH customers. FBPs were also more likely to want SSC to achieve Net Zero GHG emissions across all operations before 2050 compared with other customers	No notable insights.
SSC Young Innovators Panel	Young Innovators' Panel Interim Report (unpublished)	(25 future billpayers involved in 26th form workshop days, 43 6th formers involved in school surveys) Future customers showed a high level of concern for climate change issues; however, these were currently often secondary to monetary issues surrounding the cost of living crisis. Many of these customers engage in easier-to-perform environmental behaviours such as avoiding disposable plastics. However, a relatively low number perform larger-scale actions such as reduced meat consumption. Younger customers show concern for water usage when prompted, but, this is mainly currently prompted by the above financial concerns. Knowledge of the utilities sector is low.	No notable insights

Vulnerable vs other customers – Net Zero

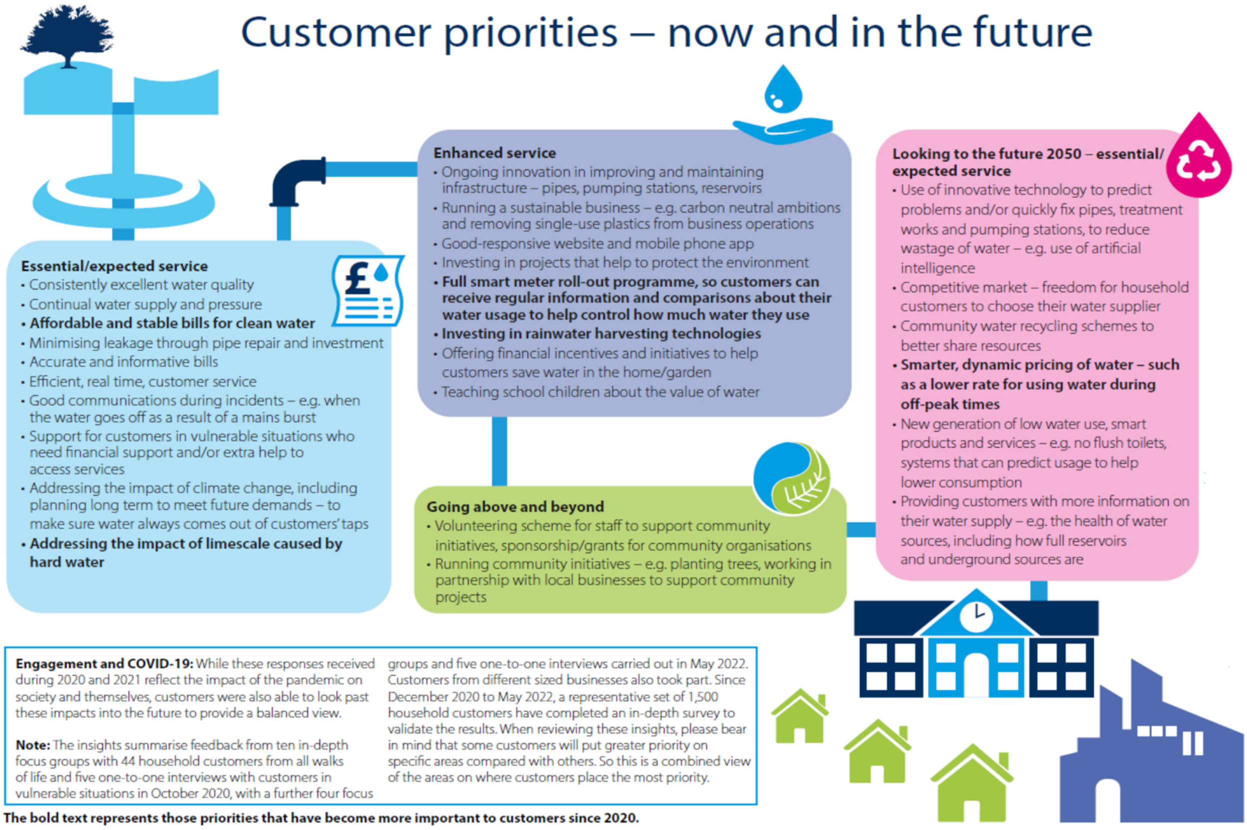
The table below summarises vulnerable customers' preferences in relation to Net Zero. Customers who are likely to be financially vulnerable, in the social grade C1C2 and DE, were more likely to lean towards keeping bills low/ affordable over several environmental investment related statements.

Evidence	Actual Report Name	Vulnerable Customers	Comparison with non-vulnerable customer base
WRMP24 Theme 2 Accent Study	SSC WRMP: MCDA Quantitative Insights	When given the choice between two scenarios, customers with lower social grades (C1C2 and DE) were more likely to lean towards keeping bill low/ affordable when compared to: (1) Investing more now for the long-term future even if it costs customers more (2) Looking after the needs of the natural environment first, by not taking too much water out of rivers/ streams or underground sources (3) Doing more to reduce the amount of water customers use – even if it costs more	No notable differences.

This project was carried out in compliance with the ISO 20252 international standard for market, opinion and social research and GDPR.

B. Additional Appendices

1.1 Customer Priorities Infographic



1.2 Accent Quant themes Environmental destination Stimulus Materials

Customers were then asked to pick one of the three levels below, each with tailored bill impact:

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