

PRIORITIES HOUSEHOLD TRACKER **YEAR 2 QUANTITATIVE INSIGHTS**

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SPECIFIC OBJECTIVES

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



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



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



Understand the customer impact of CV-19 and, from 2022, the cost of living crisis



This chart pack illustrates the year 2 quantitative insights

THE BRIEF

SSC have put together a programme of research to track customer priorities on a consistent and regular basis throughout AMP7. We are now in the second year of the tracker.



REMINDER: WORK UNDERTAKEN
throughout the first year AMP7

YEAR 1 PRIORITIES TRACKER

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



WORK UNDERTAKEN throughout the
second year AMP7

YEAR 2 PRIORITIES TRACKER

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

The research was undertaken in line with the requirements of the market, opinion and social research International Standard ISO 20252

YEAR 2 CHANGES

511 interviews conducted in Year 1. Questionnaire and approach was reviewed on completion / prior to launch of Year 2



SAMPLING

ENSURING A ROBUST APPROACH

- Including YouthSight panel members (future customers)
- Ethnic representation



QUESTIONNAIRE

CHANGES YR1 TO YR 2

- Attributes tracked:
 - New attribute = accurate billing
 - Merged = ways to connect and website
 - Removed = meter installs
- Last contact date added
- Permission to contact added
- Improved walk through GIF added to add comprehension of MaxDiff exercises

YEAR 1: 511 ONLINE INTERVIEWS / YEAR 2: 1,054 ONLINE INTERVIEWS

YEAR 1 TARGET 350 SSW/150 CAM YEAR 1: ACHIEVED 364 SSW/147 CAM

YEAR 2 TARGET 700 SSW/300 CAM YEAR 2: ACHIEVED 701 SSW/353 CAM

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

Meter Status

SSW	Target	Status	
		Year1	Year2
Metered	42%	50%	45%
Unmetered	58%	46%	51%
Don't know	-	4%	4%
CAM			
Metered	72%	75%	68%
Unmetered	28%	19%	25%
Don't know	-	6%	6%

Gender

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

Age

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

Social Grade

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

Not include prefer not to say

Quality checks:

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

Year 2 Follow ups:

- 18% opted in to H2Online signup
- 60% requested a summary of results

Year 2 Source:

- Dynata: 480 (46%)
- SSC: 406 (39%)
- CAM: 125 (12%)
- Youthsight: 42 (4%)

Not include prefer not to say

Weighting

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

Questionnaires

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

This quantitative only covers Household customers (Current bill payers and future customers) because:

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



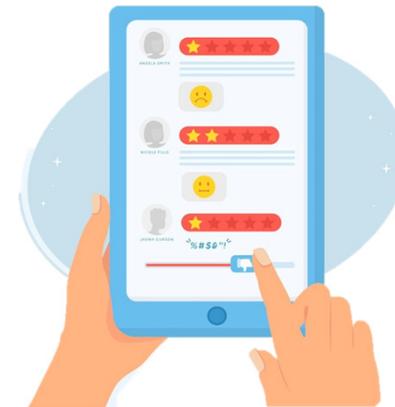
The study employed online methodology due to the following reasons:

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

Limitations of online engagement

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

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



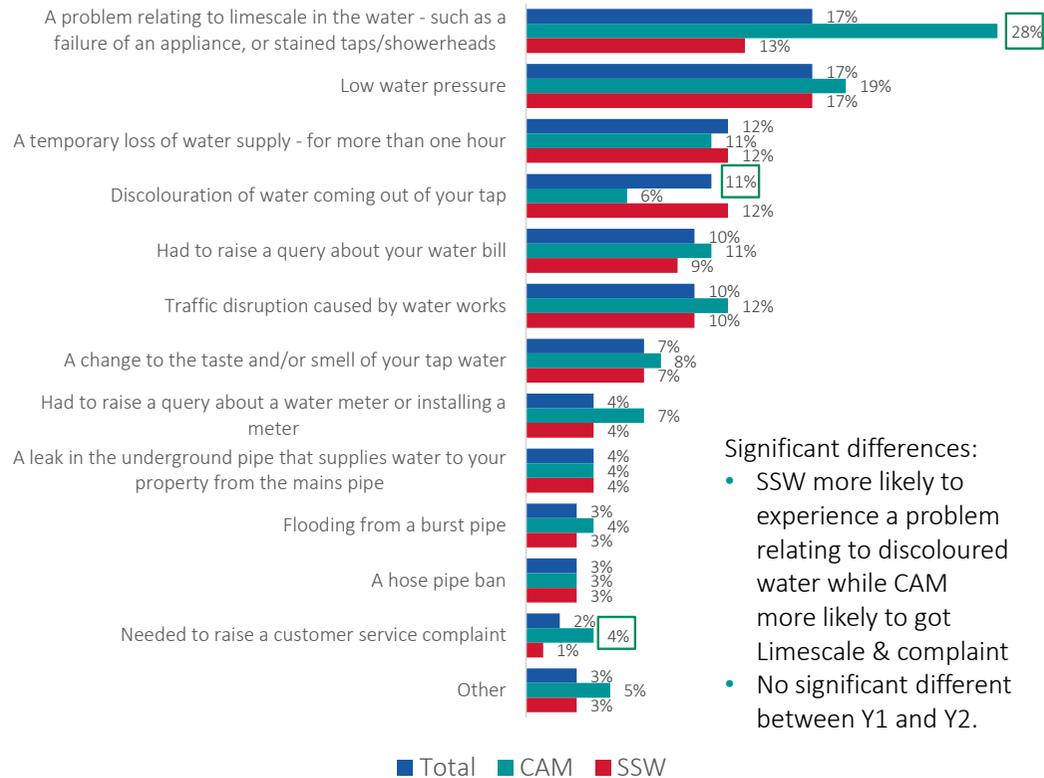
SAMPLE CHARACTERISTICS

Service issue experience/vulnerability

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

SERVICE ISSUE EXPERIENCE

54% had some form of service experience over the last 2 to 3 years
Experience is in line with other SSC surveys

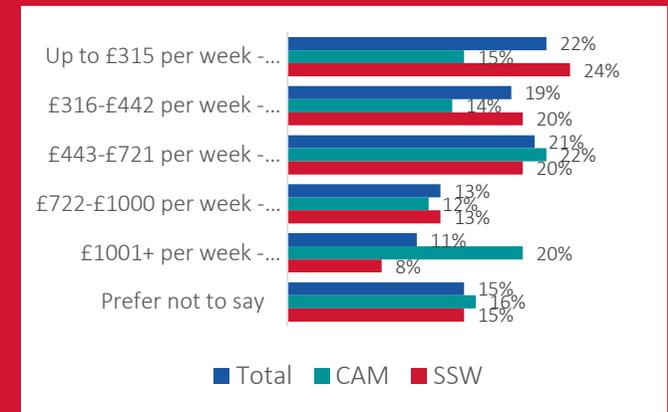


Significant differences:

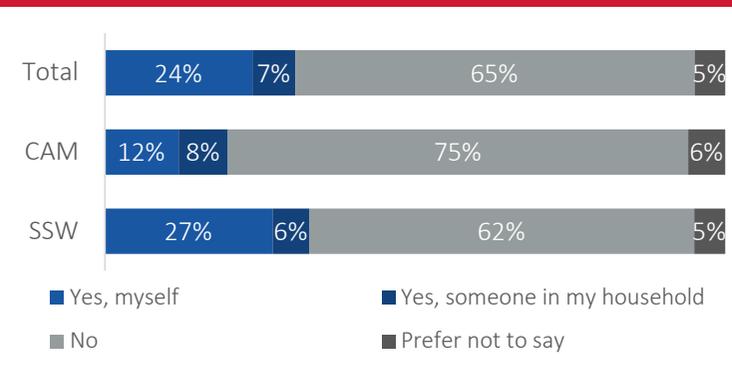
- SSW more likely to experience a problem relating to discoloured water while CAM more likely to get Limescale & complaint
- No significant different between Y1 and Y2.

VULNERABILITY: 43% OF TOTAL SAMPLE

- 22% live in a household with an annual income under £16,300 pa
- And 12% of the sample live in a household where someone is on the SSC Priority Services Register (PSR)



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



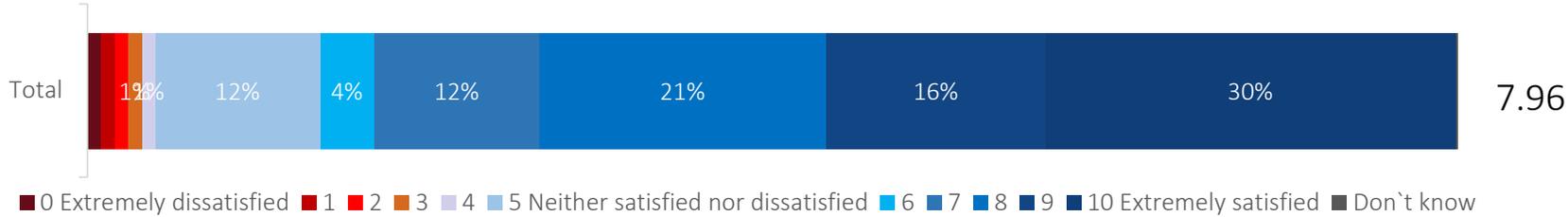
- SSW significantly more likely to have an annual household income of under £16,300pa and be in receipt of benefits
- There were no significant differences by year.

SATISFACTION, TRUST AND VALUE MONEY

CUSTOMER PERCEPTIONS

OVERALL SATISFACTION

SSW IS SIG HIGHER THAN CAM (8.1 CF 7.45); C1 IS SIG HIGHER THAN AB (8.28 VS 7.66);
 SEGMENT B (8.38) IS SIG HIGHER THAN Segment A (7.72) AND SEGMENT E (7.36)

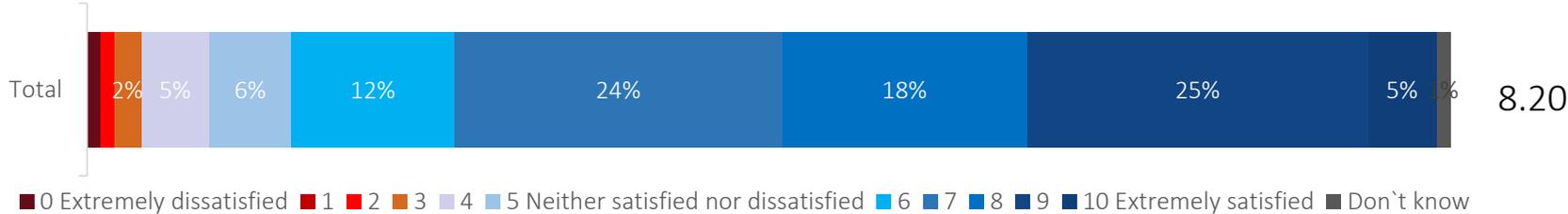


Overall satisfaction scored 0 to 10 where 0 = extremely satisfied and 10 = extremely satisfied

(Priorities Yr1 = 7.90)
 (C-Sat = 7.75 online sample)

TRUST

SSW IS SIG HIGHER THAN CAM (8.35 CF 7.65); C1 (8.23) AND DE (8.46) IS SIG HIGHER THAN AB (7.78);
 SEGMENT B (8.38) IS SIG HIGHER THAN SEGMENT A (7.72) AND SEGMENT E (7.36)

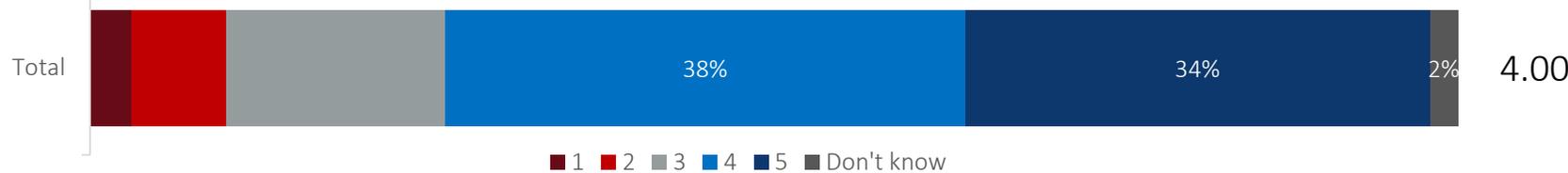


Trust scored 1 to 10 where 1 = I don't trust them at all and 10 = I trust them completely

(Priorities Yr1 = 8.11)
 (C-Sat = 8.14 online sample)

SATISFACTION WITH VALUE FOR MONEY

SSW IS SIG HIGHER THAN CAM (4.05 CF 3.82); SEGMENT E (3.68) IS SIG LOWER THAN OTHER SEGMENTS



VFM scored 1 to 5 where 1 = very dissatisfied and 5 = very satisfied

(Priorities Yr1 = 3.94)
 (C-Sat = 3.85 online sample)

LOW TRUST/SATISFACTION → HIGH TRUST/SATISFACTION

There were no significant differences by year

YEAR 2 (2021/22)
CUSTOMER PRIORITIES



KEY EVENTS IN THE LAST 12 MONTHS

WATER & FLOODING RELATED

Southern Water fined record £90m for dumping sewage

[Defra Press Office](#), 12 July 2021 - Uncategorized

Southern Water fined record £90m for CSO misreporting

UK government U-turns on sewage after Tory MPs threaten rebellion

Water companies will have duty to reduce impact of discharges from storm overflows

Lords agrees improvements to Environment Bill - UK Parliament

Thames Water fined for causing traffic chaos with unauthorised roadworks

Scottish Water fined after admitting water pollution which killed 500 fish

Thames Water fined for causing traffic chaos with unauthorised roadworks
Published: Monday, June 21, 2021
 Thames Water caused traffic chaos on roads in the borough a court has heard when it set up a series of roadworks with temporary traffic lights without any permission or advance warning.

Scottish Water fined after admitting water pollution which killed 500 fish

[UK News](#) | Published: May 10, 2021
 Approximately 400 litres of chemical coagulant were discharged into the River Eden in Fife in October 2018, killing brown trout, sea trout and salmon.

Horrifying Map Shows You Which Rivers In England And Wales Are Filled With Sewage
HUFFPOST | HuffPost UK

Media coverage on polluted rivers in England

E-coli: Thousands of homes in Surrey and Kent could have contaminated tap water
HEALTH | E.COLI | Friday 8 October 2021, 3:47pm

Europe 02:15, 30-Nov-2021 [Translate](#)

Fatal Storm Arwen batters UK and Spain with floods and snowstorms

More storms in England

Duxford CAM incident

Strom Arwen

High levels of toxic chemicals found in Cambridgeshire water supply

Exclusive: Cambridge Water admits a supply contained four times the regulatory limit and customers never told

Storm Arwen: Pictures Which Sum Up The Chaos Caused By The Intense Weather

The storm has left homes in northern England without power for multiple nights in a row.

Storm Eunice

Storm Eunice unleashes record-setting winds, widespread damage in England

Eunice arrived right on the heels of destructive Storm Dudley. The windstorm duo struck Europe with deadly force, unloading 100-mph winds in areas and causing a frightening scene on a commuter ferry in Germany.

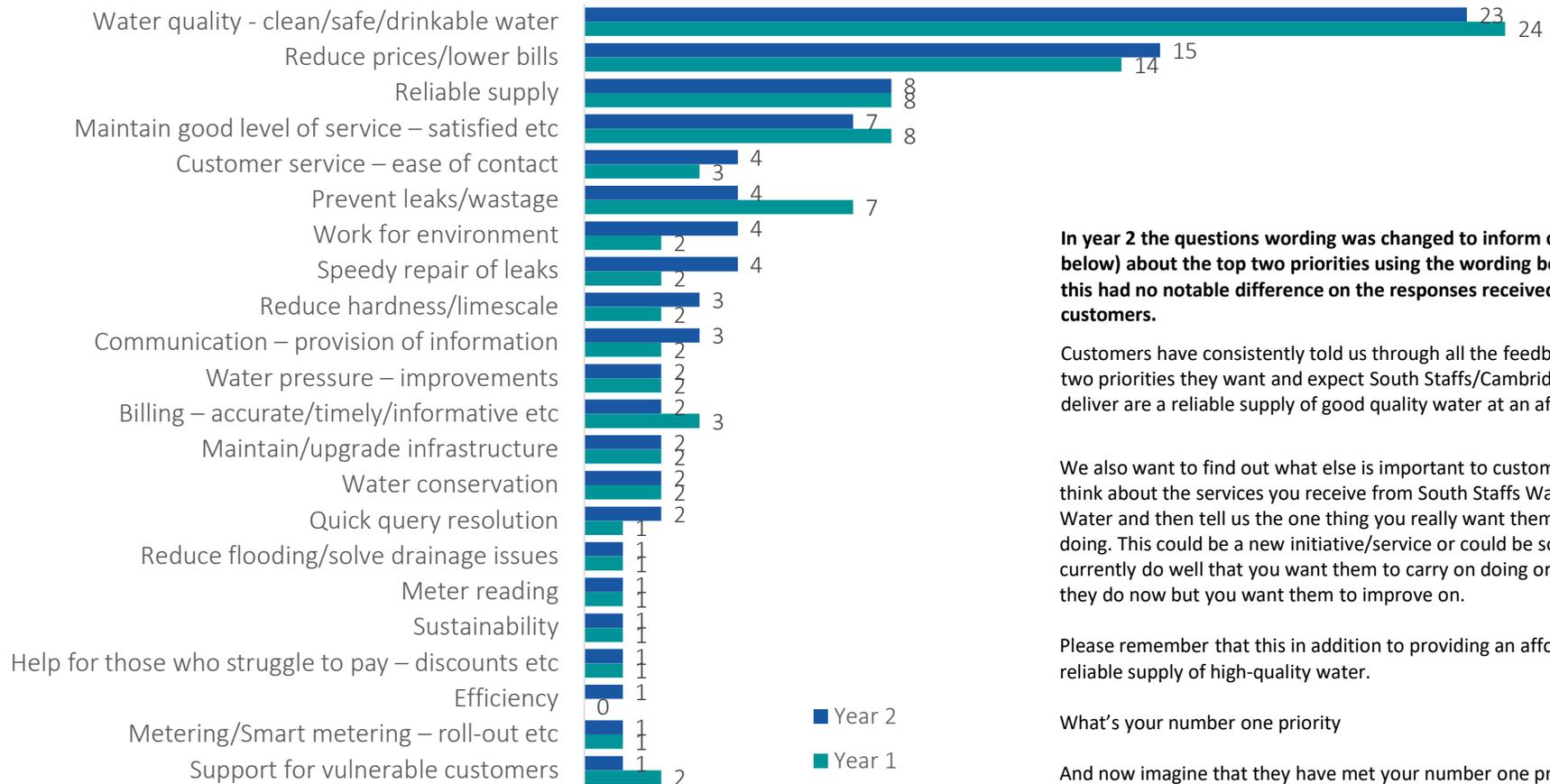


Public urged to "Respect the Water" as new statistics show drowning deaths increased last year, with more dying inland than around the coast.
19/05/2021

QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON

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



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

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

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

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

What's your number one priority

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

QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON – EXAMPLES

Comments in Year 2 were similar to what we've seen last year, mostly centred around three areas

HYGEINE PRIORITIES

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

Delivering clean fresh water

Prevention of leaks and wasting of water

Saving customers money and let customers know what grants are available to help with costs towards water bills if they qualify. Usually no one is told about these unless you read everything on the webpage to find out things.

ENHANCING PRIORITIES

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

People who don't have meters should be forced to have them due to inconsiderate wastage

Input to planning processes so that the already stressed water supplies are sustainable.

Quick access to customer services, every time I've called waited a long time to speak to someone. Also reported burst pipe in road outside property took ages to be fixed

That would be to tell you to stop my water supply smelling like Bleach! It's not notice as drinking water goes.

FUTURE PRIORITIES

- App provision
- Roll out of smart metering

To ensure water supply 100%. The number of new buildings (housing, gyms etc) in CB is worrying.

More in depth water usage analysis would be useful

MEASURING PRIORITIES

METHODOLOGY

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

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

Least important

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

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

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

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

Most important

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

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*Full questionnaire and stimulus were added to [Appendix B & C](#)

TWO IDENTICAL EXERCISES

- Two exercises different only in that information about all the different areas was shown to participants between and during the second exercise.
- Hence, we have an uninformed and informed set of priorities
- Experimental design created of 5 choices per person per exercise, blocked into 20 sets. Each initiative appeared once in each set
- Econometric (logit) models were estimated on the choice data. Priority rankings were derived from the rank order of the coefficients

PRIORITY AREAS: YEAR 2 VS YEAR 1

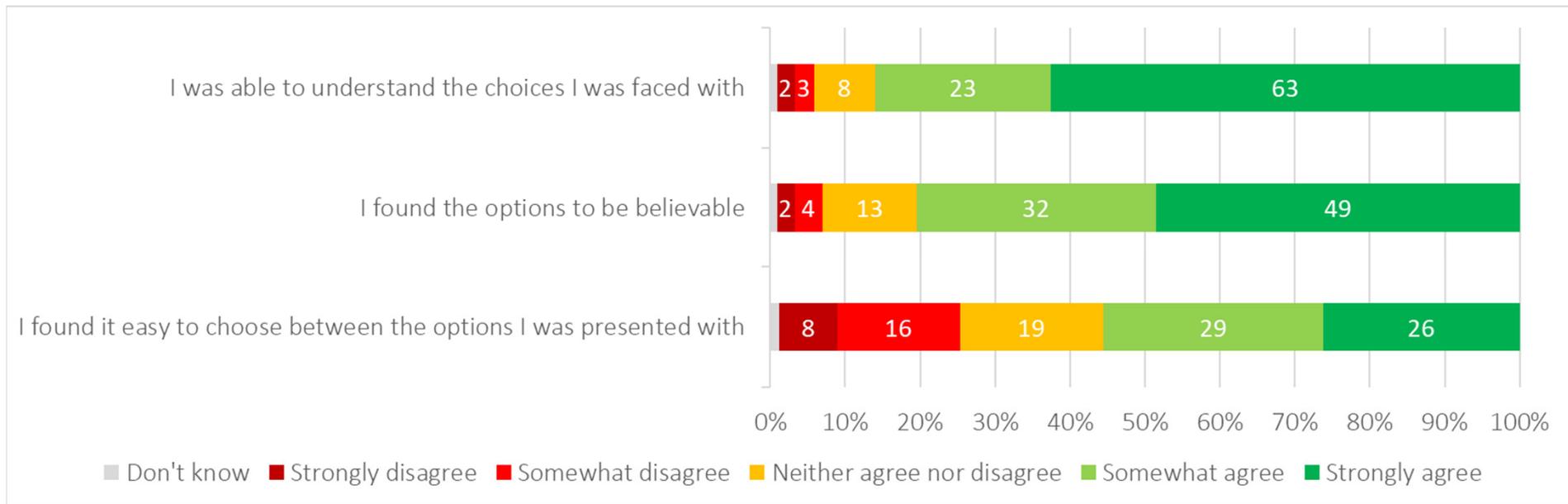


- Two low-ranked areas dropped:
 - Meter installs (19th)
 - Website (20th)
- New area included: Accurate bills

MAXDIFF DIAGNOSTICS

PARTICIPANT UNDERSTANDING

Vast majority found the choices understandable and options believable



Base: 556 participants (Year 2 QTR 3&4; unweighted)

OPTIONS CHOICE

- A smaller proportion did not find it easy to choose between the options, principally because they often all seem important

15

Because they are all sensible and valid

They were all very good options to choose from and to pick one was difficult

In most of the questionnaires, I would have selected all the four questions as most important.

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - PRIORITY SCORES*

HEADING	DESCRIPTION	UNINFORMED	INFORMED
 RELIABILITY OF WATER QUALITY	They make sure your household receives water supplies that are high quality and always safe to drink	18.2	20.3
 BILL AFFORDABILITY	They keep the cost of water affordable for customers, today, tomorrow and long into the future	12.5	11.6
 LEAKAGE REDUCTION	They quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks	9.9	9.9
 LONG-TERM SUPPLY PLANNING	They have detailed plans in place to make sure drinking water always comes out of your taps – today, tomorrow and long into the future	7.3	8.3
 SENDING INCIDENT NOTIFICATIONS	They will always tell you if your water supply is to be cut off temporarily and/or if there is an issue with the quality of your water	5.4	4.9
 PROTECTING WATER RESOURCES	They actively protect the environment by not taking too much water from rivers & underground water sources and working with landowners & farmers to ensure water sources are not damaged by pollution	4.8	5.2
 FINANCIAL BILL SUPPORT	They provide extra support for customers who are struggling to pay their bills – for example, discounted bills or payment breaks	4.6	4.3
 ACCURATE AND INFORMATIVE BILLS	They have accurate bills that are clear making it easy to understand what you are being charged for, how much you owe and what action you need to take next	4.1	3.2
 MITIGATING WATER HARDNESS	They make sure your household is not impacted by the effects of hard water - for example, limescale in your appliances and taps, or particles/scum floating in the water when you make a drink	4.0	3.8
 SERVICE SUPPORT (VULNERABLE PSR)	They provide support for customers who need extra help accessing their services – for example, delivering bottled water if the water is cut off or braille bills	4.0	3.8

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

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - PRIORITY SCORES* (CONT.)

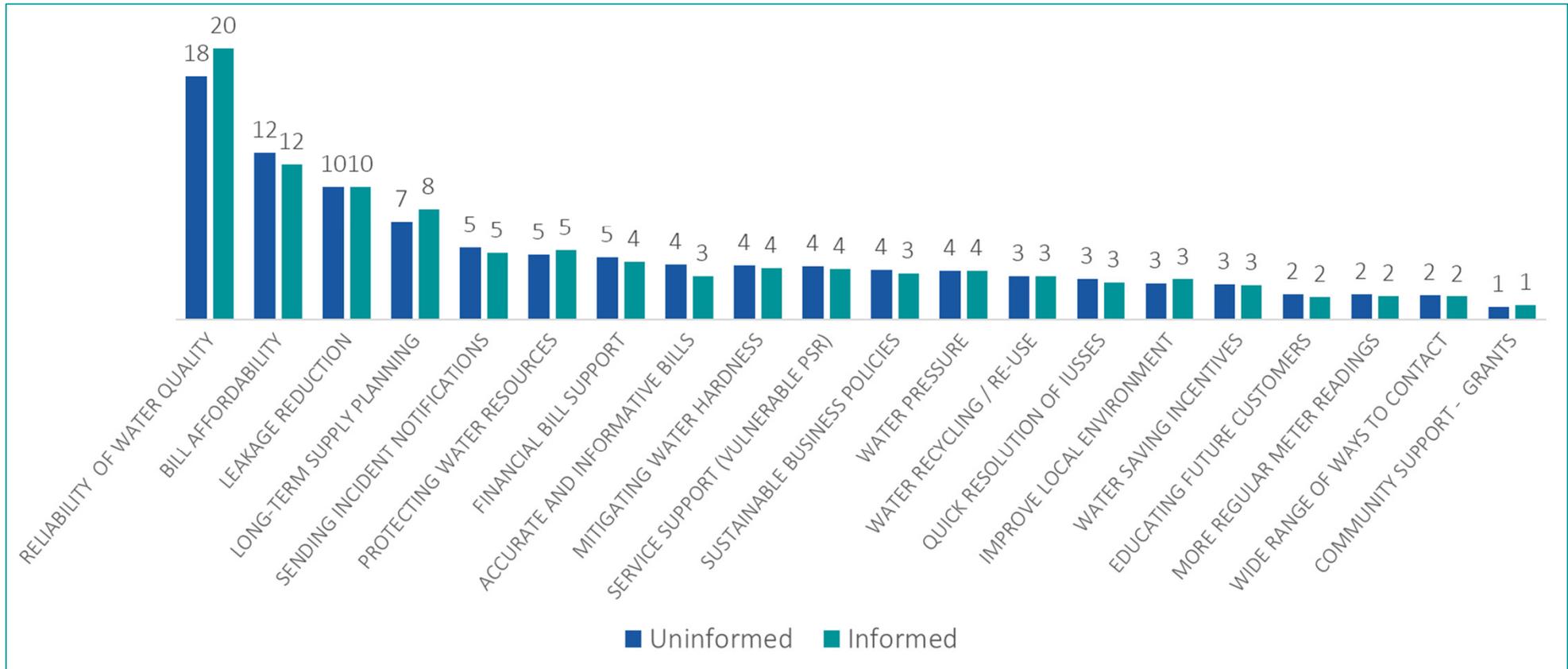
HEADING	DESCRIPTION	UNINFORMED	INFORMED
 SUSTAINABLE BUSINESS POLICIES	They focus on becoming a sustainable business that reduces the environmental impact of its operations - for example, reducing carbon emissions, waste that goes to landfill and single use plastics	3.7	3.4
 WATER PRESSURE	The water always comes out of the taps at a pressure that does not impact on the way you use water at home – e.g. taking a shower/bath, using a hose	3.6	3.6
 WATER RECYCLING / RE-USE	They pro-actively work with households and developers to adopt approaches to re-use water – i.e. rainwater harvesting and ‘grey’ water recycling, where less treated water is used for activities like watering the garden and flushing the toilets	3.2	3.2
 QUICK RESOLUTION OF ISSUES	They are easy to deal with by quickly and effectively resolving any queries you have about your water services	3.0	2.8
 IMPROVE LOCAL ENVIRONMENT	They improve the environment in the areas they supply, by offering grants to support local projects that improve natural habitats – i.e. trees, plants and animals	2.7	3.0
 WATER SAVING INCENTIVES	They provide incentives to customers who use less water – for example, tariffs that are lower if you use water outside of times of peak demand	2.6	2.6
 EDUCATING FUTURE CUSTOMERS	They work closely with primary, secondary schools and higher education bodies to educate young people about the value of conserving and re-using water	1.9	1.7
 MORE REGULAR METER READINGS	They provide customers with meter readings on a regular basis (at least quarterly) to allow them to monitor and better understand how much water they use	1.8	1.7
 WIDE RANGE OF WAYS TO CONTACT	They provide a wide range of ways to contact and interact with them so that any customer can easily access their services and support – e.g. face-to-face, phone, website, webchat, e-mail, mobile APP, letter	1.8	1.7
 COMMUNITY SUPPORT - GRANTS	They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply	0.9	1.0

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

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - PRIORITY SCORES*

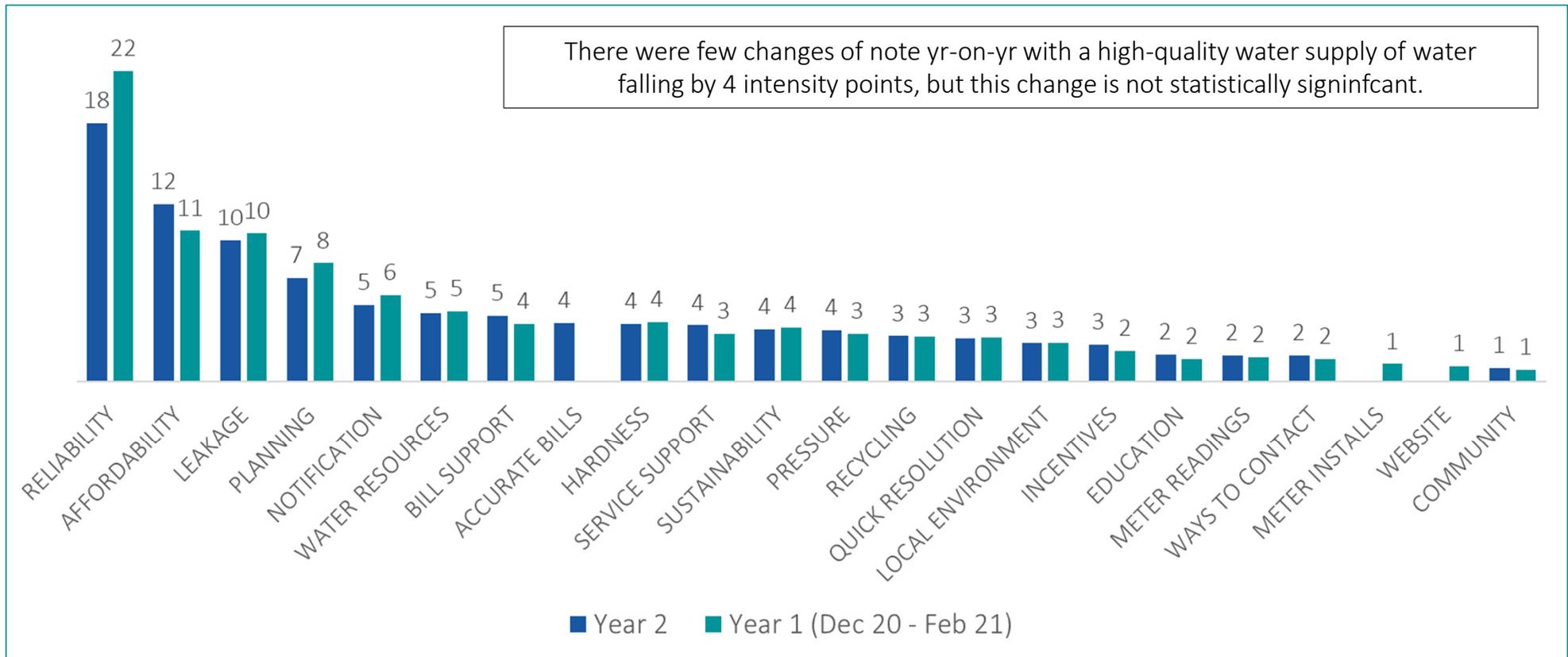
These areas are viewed as important by customers for SSC to address – from most important to least important



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

YEAR 2 ON YEAR 1 COMPARISON OF PRIORITY SCORES*

UNINFORMED PRIORITIES



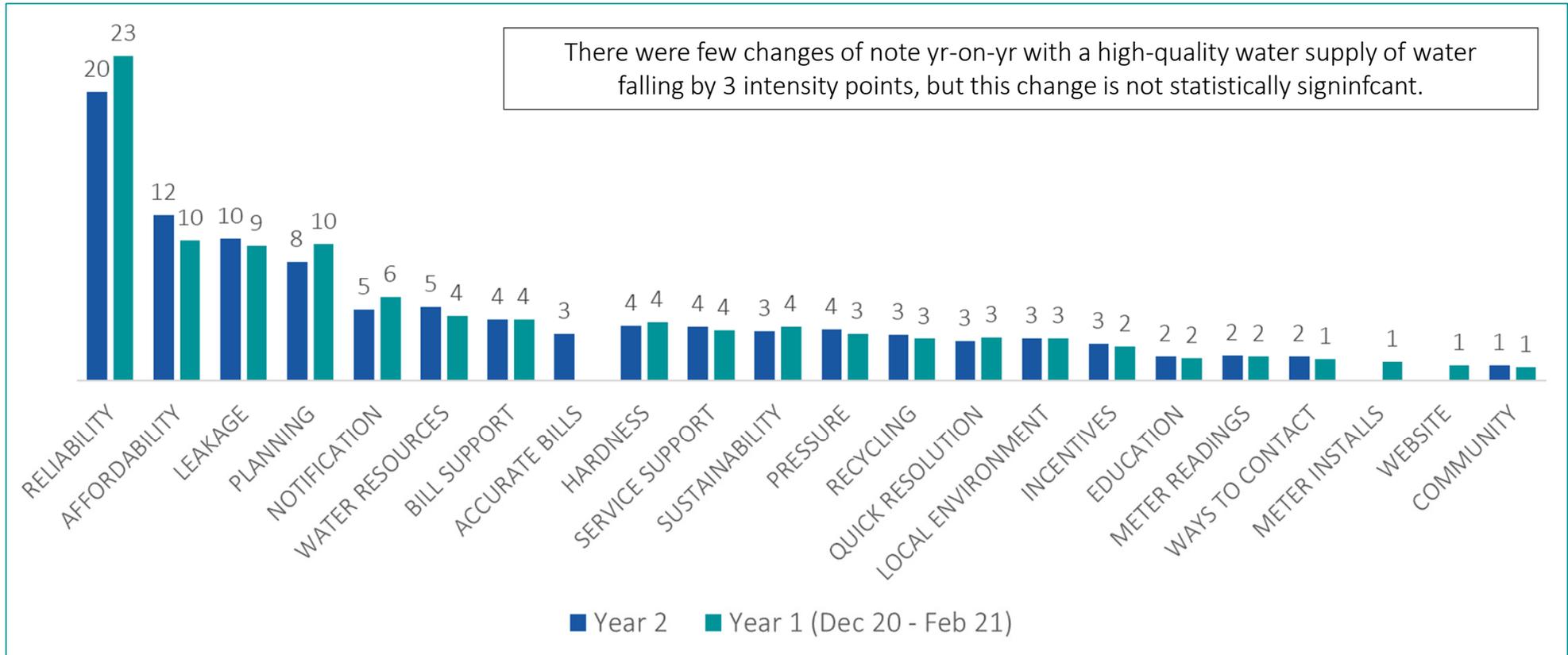
* Priority scores are a measure of preference intensity on a 0-100 scale.

'Accurate Bills' included in Year 2 only

'Meter installs' ('They ensure that all customers who want a water meter are able to have one installed') and 'Website' ('They have a website that allows you to find the answer to any queries quickly and easily') included in Year 1 only

YEAR 2 ON YEAR 1 COMPARISON OF PRIORITY SCORES*

INFORMED



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

'Accurate and informative bills' included in Year 2 only

'Meter installs' and 'Website' included in Year 1 only

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

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

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

Water viewed as an essential human right	Safe drinking water
<p><i>Safe, reliable drinking water is crucial for everyone. It is effectively a human right. An unpolluted water system is crucial to continue to provide this reliable safe water.</i></p> <p><i>I continue to think that water is an essential right, and also that the wealth disparity across Cambridge makes that an important priority.</i></p> <p><i>Water is a fundamental need - nobody should ever be without water.</i></p> <p><i>As water supply is essential for the health of the population.</i></p>	<p><i>Need to support struggling families as lack of clean water can have health implications.</i></p> <p><i>I don't ever want to have to live from bottled water like they do in other countries.</i></p> <p><i>Water needs to be free of lamblia, brucella, and e-coli.</i></p> <p><i>I am disabled and have an autoimmune disease which means I have a low immune system and I can ill quickly from a bug.</i></p> <p><i>Drinking unsafe water is just unacceptable.</i></p> <p><i>Do not want to drink infested water.</i></p> <p><i>My water is orange.</i></p>

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – BILL AFFORDABILITY

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

Rising cost of living

Everything is going up and lots of people can't afford anymore without going into debt for daily living costs.

If customers are unable to afford their bills it may result in falling hygiene standards and ultimately risk to public health.

Utility poverty is a huge problem in this country and sometimes a break makes all the difference.

On a personal level, the income my wife & I live on comes from underperforming pension schemes & a system that negates any state pension increases due to the increased cost of living (council tax rises, energy prices, etc.).

Keeping costs stable helps as income rarely increased.

So that people do not have to suffer debt to pay for water.

Because many struggle to pay their bill/s, especially as I'm a pensioner.

Neglecting personal hygiene due to rising costs

I myself worry constantly about how I can afford to pay my bill, to the extent that I daren't bath or shower as often as I would like.

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

WHY CUSTOMERS SUPPORT AN INITIATIVE AS TOP PRIORITY – LEAKAGE REDUCTION

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

Unresolved water leaks costing the customers

Swift repairs will encourage consumers to be more careful with their own consumption. People sometimes can't see the point of being economical because of the huge waste they see that they can do nothing about.

Leaks can often go undetected by householders. I'm sure this impacts more than individual household usage.

Repairs to pipe works will reduce waste of water and help to keep costs down.

Any leakage costs the consumer in the long run.

It doesn't make sense to waste

I didn't realise that 20% of treated water is lost each day, so now I think it's even more important to fix leaks!

Loss of water through leaks is irresponsible so should be a high priority when we are trying to use water wisely.

I just don't like the idea of water being wasted through leaks.

All leaks must be stopped within 2 hours.

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

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

Reasons allude to forward preparation in case of emergencies and disruptions

Need plan for a sustainable future

The population in the area is increasing rapidly and will create greater demands on limited resources that are becoming less predictable as climate changes. Plans to deal with this increased demand are vital for normal supply and emergency planning.

A clean, reliable water supply should be expected in a developed country. This requires detailed forward planning.

So it doesn't impact daily life

It's important as a customer to know if your water is cut off. You could be in the shower, doing the washing, or anything like that.

A broken pipe means no water, no water could mean no food in some households (pasta, boiled veg, etc).

This is to help people be able to plan ahead on how to pay their bills, and how to deal with any unexpected issues.

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

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

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

Important to know	Customers can prepare for alternatives	This is expected from a water company
<p><i>I feel it would be important for me to know that I would not have water available</i></p> <p><i>It is important to know if your water supply is going to be cut off.</i></p> <p><i>Because having a family and important use of water</i></p>	<p><i>A water supply is essential and being without one unexpectedly might be problematic.</i></p> <p><i>If you know something is going to happen then you can prepare for the occasion</i></p> <p><i>So that we can plan for the cut off or know why quality is affected</i></p>	<p><i>Being left without water would be a big deal. Providing water is their main purpose and we would need informing.</i></p> <p><i>Water supply is critical. It is important to know ahead when there will be issues.</i></p>

YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

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

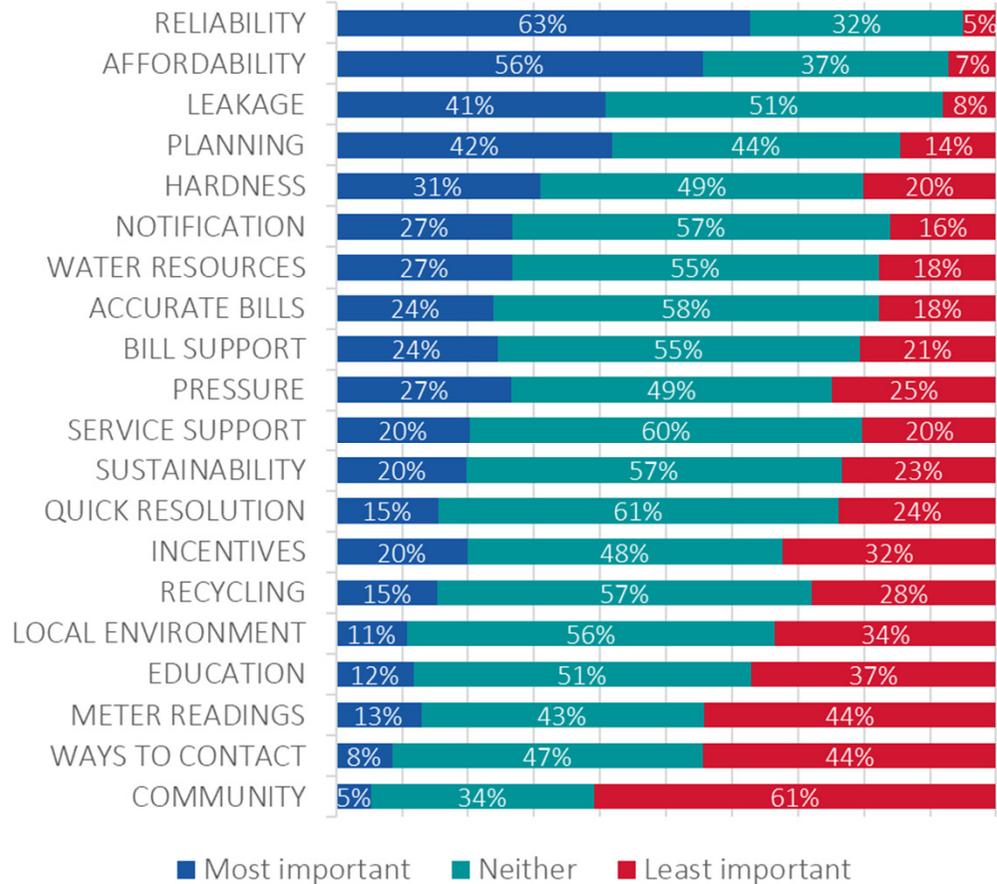
There is a strong sense of priority placed on protecting the environment for now and future generations. Customers also showed concerns about pollution to land & water

Important to project the environment	Worry about pollution	Thinking about future generations
<p><i>Ecological is important to save environment</i></p> <p><i>Protecting the environment has to be a priority for us all</i></p> <p><i>To protect our environment and resources and the life that lives in our waters is important.</i></p>	<p><i>Pollution is a worry as there are a lot of farms in the area. leaching is not prevalent at the moment but requires vigilantes to keep it to a minimum.</i></p> <p><i>Because taking too much water from rivers and underground water sources and pollution by landowners and farmers will damage the environment.</i></p> <p><i>Safe, reliable drinking water is crucial for everyone. It is effectively a human right. An unpolluted water system is crucial to continue to provide this reliable safe water. Further, it is critical to the ecosystem in the UK.</i></p>	<p><i>Looking after our environment is important now and for future generations</i></p> <p><i>As this is for the future and benefits everyone, and is on going for rest us and next generation and so on.</i></p> <p><i>Because the environment is important and we only get one earth. We need to be sustainable and responsible in how we use resources.</i></p>

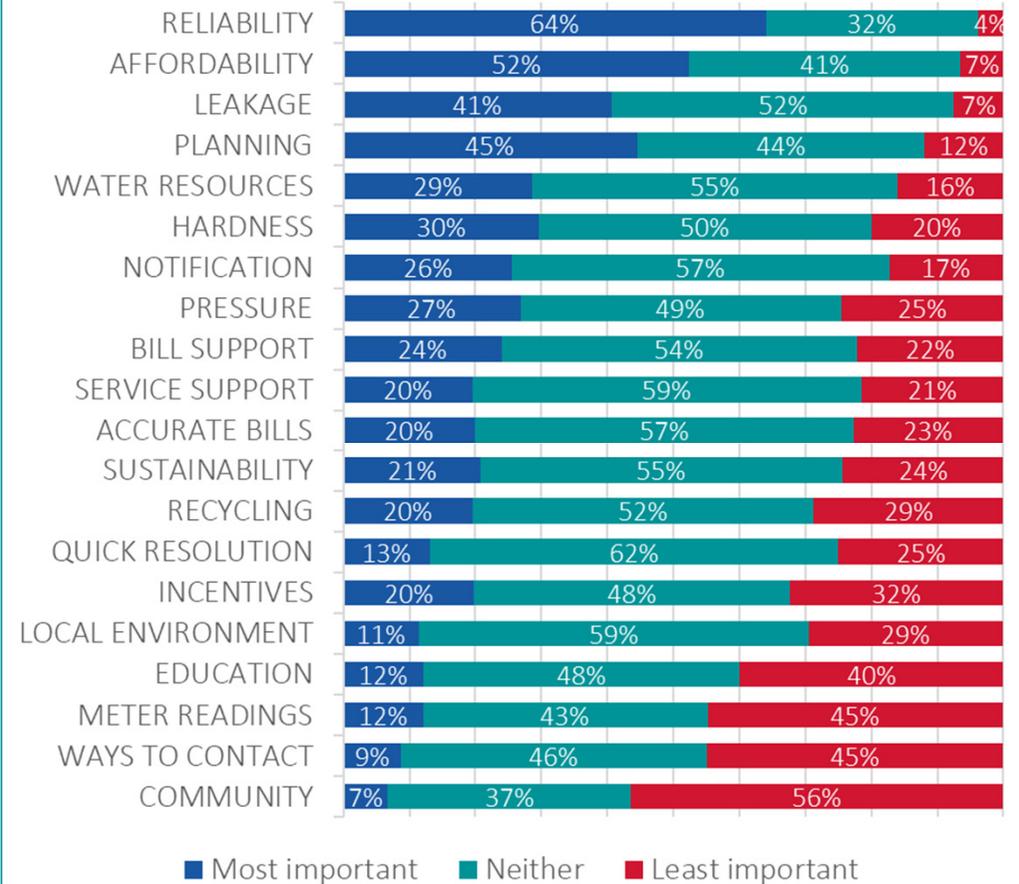
YEAR 2: QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - BEST-WORST RANKING*

UNINFORMED



INFORMED



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

CHANGES IN PRIORITIES

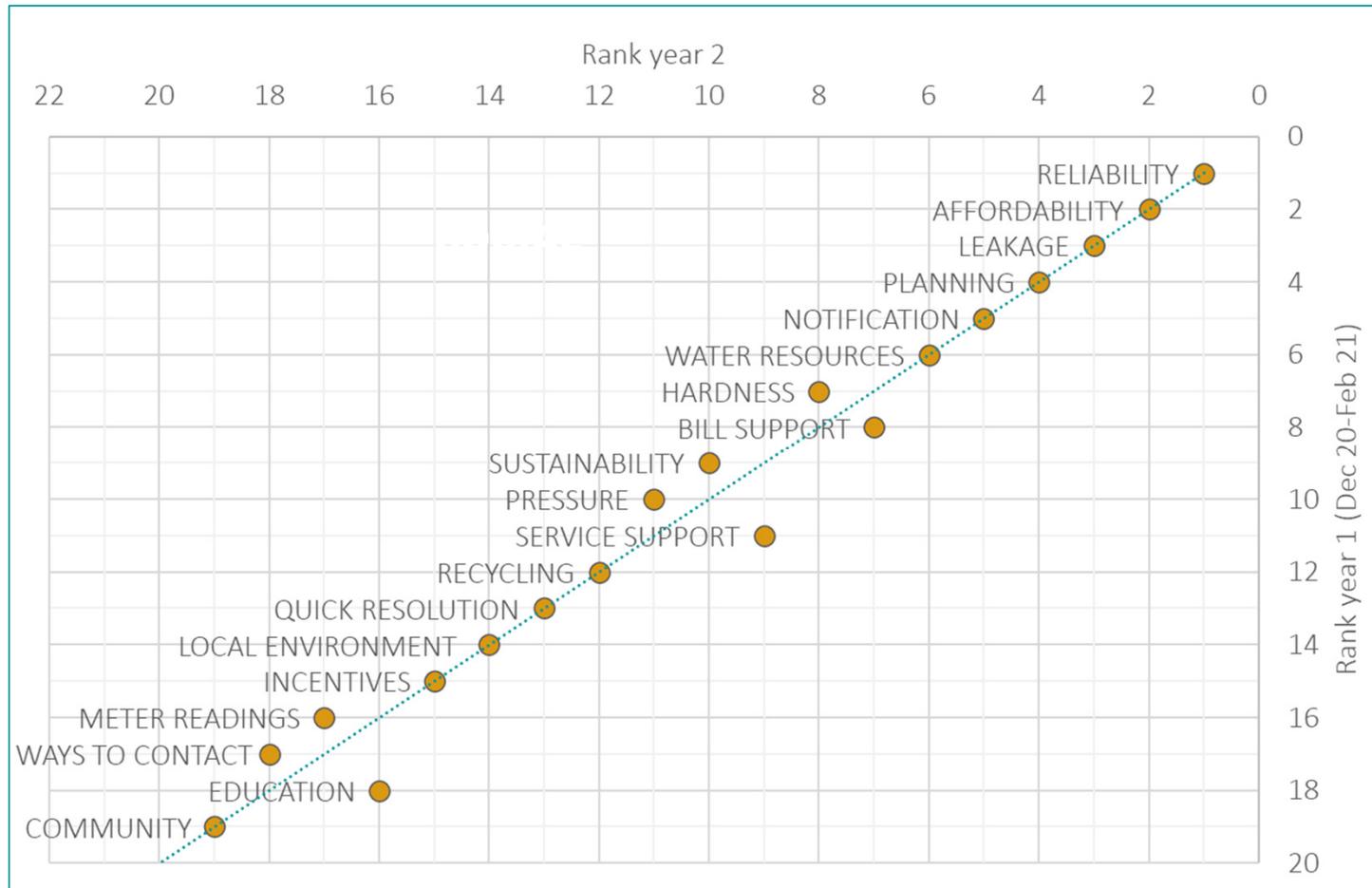
COMPARISON OF RANKINGS: YEAR 2 VS YEAR 1

	Uninformed			Informed		
	Year 2	Year 1 (Dec 20-Feb 21)		Year 2	Year 1 (Dec 20-Feb 21)	
RELIABILITY	1	1		1	1	
AFFORDABILITY	2	2		2	2	
LEAKAGE	3	3		3	4	↑
PLANNING	4	4		4	3	↓
NOTIFICATION	5	5		6	5	↓
WATER RESOURCES	6	6		5	6	↑
BILL SUPPORT	7	8	↑	7	7	
HARDNESS	8	7	↓	8	8	
SERVICE SUPPORT	9	11	↑	9	10	↑
SUSTAINABILITY	10	9	↓	11	9	↓
PRESSURE	11	10	↓	10	11	↑
RECYCLING	12	12		12	14	↑
QUICK RESOLUTION	13	13		14	12	↓
LOCAL ENVIRONMENT	14	14		13	13	
INCENTIVES	15	15		15	15	
EDUCATION	16	18	↑	18	17	↓
METER READINGS	17	16	↓	16	16	
WAYS TO CONTACT	18	17	↓	17	18	↑
COMMUNITY	19	19		19	19	

- The rankings are stable overall (correlation > 0.98)
- No differences in the top six ranks for uninformed choices
- Max rank difference of 1 in the top eight ranks for informed choices
- There are more differences in the bottom half of the ranking
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (year 2 only)
 - Ranks revised accordingly

CHANGES IN PRIORITIES

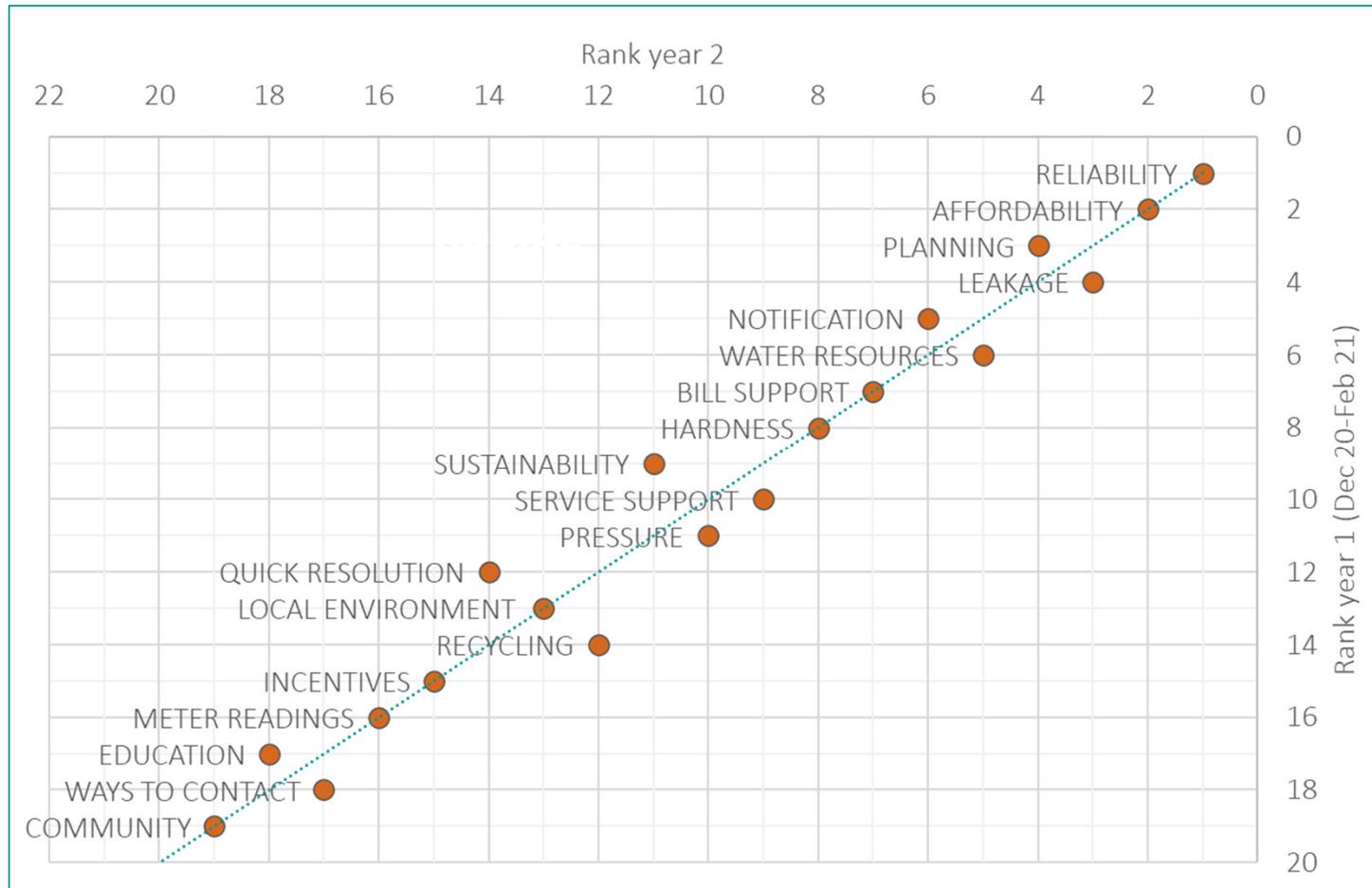
COMPARISON OF RANKINGS: YEAR 2 VS YEAR 1 (UNINFORMED)



- This chart captures the same information as on the previous slides, but for uninformed priorities only.
- Those priority areas below the line are ranked higher in Year 2 than Year 1.
- The ranking is stable overall (correlation = 0.99)
- There are no differences in the top six ranks, but some in the bottom half
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (year 2 only)
 - Ranks revised accordingly

CHANGES IN PRIORITIES

COMPARISON OF RANKINGS: YEAR 2 VS YEAR 1 (INFORMED)



- The ranking is stable overall (correlation = 0.98)
- Max rank difference of 1 in the top eight ranks
- Those priority areas below the line are ranked higher in Year 2 than Year 1.
- There are more differences in the bottom half of the ranking
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (year 2 only)
 - Ranks revised accordingly

CHANGES IN PRIORITIES BY QUARTER

COMPARISON OF RANKINGS: YEAR 2 QTR 3&4 VS QTR1&2 VS YEAR 1

	Uninformed			Informed		
	Year 2 QTR 3&4	Year 2 QTR 1&2	Year 1	Year 2 QTR 3&4	Year 2 QTR 1&2	Year 1
RELIABILITY	1	1	1	1	1	1
AFFORDABILITY	2	2	2	2	2	2
LEAKAGE	3	3	3	3	3	4
PLANNING	4	4	4	4	4	3
NOTIFICATION	5	5	5	6	6	5
WATER RESOURCES	6	6	6	5	5	6
BILL SUPPORT	7	7	8	7	7	7
SERVICE SUPPORT	8	9	11	9	8	10
HARDNESS	9	8	7	8	9	8
SUSTAINABILITY	10	11	9	12	11	9
PRESSURE	11	10	10	10	10	11
RECYCLING	12	13	12	11	12	14
QUICK RESOLUTION	13	12	13	14	14	12
LOCAL ENVIRONMENT	14	15	14	13	13	13
INCENTIVES	15	14	15	15	15	15
METER READINGS	16	18	16	16	18	16
WAYS TO CONTACT	17	17	17	18	16	18
EDUCATION	18	16	18	17	17	17
COMMUNITY	19	19	19	19	19	19

Year 1: Dec 2020 - Feb 2021. Green: Increasing trend. Red: Decreasing trend. Yellow: No trend.

- The rankings are stable overall
- Correlations across waves > 0.97 for uninformed and informed
- No differences in the top six ranks for uninformed choices
- Max rank difference of 1 in the top seven ranks for informed choices
- There are more differences in the bottom half of the ranking
- NB Not included:
 - 'Meter installs' and 'Website' (year 1 only)
 - 'Accurate bills' (year 2 only)
 - Ranks revised accordingly

SEGMENTATION ANALYSIS

METHODOLOGY

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

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

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

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

➤ NB No significant differences were found according to whether participants did / did not contact the company within the last year

YEAR 2: DIFFERENCES IN PRIORITIES

COMPARISON OF RANKINGS ACROSS REGIONS

	Uninformed			Informed		
	South Staffs Water	Cambridge Water		South Staffs Water	Cambridge Water	
RELIABILITY	1	1		1	1	
AFFORDABILITY	2	2		2	3	↑
LEAKAGE	3	3		3	2	↓
PLANNING	4	4		4	4	
NOTIFICATION	5	6	↑	5	6	↑
BILL SUPPORT	6	7	↑	7	8	↑
WATER RESOURCES	7	5	↓	6	5	↓
HARDNESS	8	12	↑	8	12	↑
ACCURATE BILLS	9	10	↑	12	10	↓
SERVICE SUPPORT	10	11	↑	9	11	↑
PRESSURE	11	14	↑	10	14	↑
SUSTAINABILITY	12	8	↓	11	9	↓
QUICK RESOLUTION	13	15	↑	15	16	↑
RECYCLING	14	9	↓	13	7	↓
INCENTIVES	15	16	↑	16	15	↓
LOCAL ENVIRONMENT	16	13	↓	14	13	↓
WAYS TO CONTACT	17	19	↑	17	19	↑
EDUCATION	18	17	↓	19	18	↓
METER READINGS	19	18	↓	18	17	↓
COMMUNITY	20	20		20	20	

- The rankings are very similar (correlation = 0.93)
- Initiatives linked to the environment tend to rank higher among CAM customers (Leakage; Water resources; Sustainability; Recycling; Local environment), but only one difference is significant, under informed choices
- No significant differences under uninformed choices

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES

HIGHER PRIORITY FOR.....

ACCURATE BILLS

- Segment E
- Metered customers
- Those who have contacted SSC re: bill



BILL SUPPORT (£)

- DE social grades
- Low income households
- Unmetered customers
- Customers in vulnerable situations



SERVICE SUPPORT (PSR)

- Younger customers (18-35)
- DE social grades
- Low income households
- Customers in vulnerable situations



WATER HARDNESS

- Younger customers (18-35)
- Male customers
- Those who have contacted SSC re: limescale



PROTECTING WATER RESOURCES

- High income households
- Segment B
- Segment D



SUSTAINABILITY

- Younger customers (18-35)
- Medium income households
- AB social grades
- Segment B



STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER DEMOGRAPHICS

Segment	Initiative	Uninformed		Informed	
		Rank	Difference	Rank	Difference

Region

SSW	RECYCLING			13th	-6
CAM	RECYCLING			7th	6

Age

18-35 yrs	PLANNING			10th	-6
	HARDNESS			6th	3
	SERVICE SUPPORT	6th	4		
	SUSTAINABILITY			4th	8
35-64 yrs	SUSTAINABILITY	12th	-5		
65 yrs +	BILL SUPPORT	9th	-3		

Gender

Female	HARDNESS	11th	-5		
	PRESSURE	13th	-6	14th	-9
Male	HARDNESS	6th	5		
	PRESSURE	7th	6	5th	9

- Cells highlighted in green/red in the subsequent tables indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 - the difference between priority scores is statistically significant at the 10%
- Significant differences are broadly in line with those observed in Year 1:
 - Sustainability ranked higher by 18-35 yrs group
 - Bill support ranked lower by 65 yrs + group
 - Pressure ranked lower by females and higher by males

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER DEMOGRAPHICS (CONT.)

Segment	Initiative	Uninformed		Informed	
		Rank	Difference	Rank	Difference

Social grade

AB	BILL SUPPORT	12th	-6	10th	-3
AB	SUSTAINABILITY			7th	6
C1C2	BILL SUPPORT			9th	-4
DE	WATER RESOURCES	10th	-4	10th	-5
DE	BILL SUPPORT	4th	7	4th	6
DE	SERVICE SUPPORT	7th	6	6th	6
DE	PRESSURE			11th	-4

Household income

Up to £315 p.w.	NOTIFICATION			8th	-3
Up to £315 p.w.	BILL SUPPORT	3rd	7	5th	4
Up to £315 p.w.	SERVICE SUPPORT	7th	5	6th	5
£316-£442 p.w.	WATER RESOURCES			10th	-5
£443-£721 p.w.	BILL SUPPORT			12th	-5
£443-£721 p.w.	SUSTAINABILITY	6th	6	6th	6
£443-£721 p.w.	LOCAL ENVIRONMENT			7th	7
£722-£1,000 p.w.	BILL SUPPORT	14th	-8	12th	-5
£1,001+ p.w.	WATER RESOURCES	4th	3		
£1,001+ p.w.	BILL SUPPORT	14th	-8	16th	-9
Prefer not to say	BILL SUPPORT	10th	-3		

- Cells highlighted in green/red in the subsequent tables indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 - the difference between priority scores is statistically significant at the 10%
- Significant differences are broadly in line with those observed in Year 1 (NB Segmentation by income not included in Year 1 analysis):
 - Sustainability ranked higher by higher SEG groups
 - Water resources ranked lower by lower SEG groups
 - Bill support and service support ranked higher by lower SEG groups

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER SEGMENTS & METER STATUS

Segment	Initiative	Uninformed		Informed	
		Rank	Difference	Rank	Difference

Segment

Caring But Hard Pressed	WATER RESOURCES	11th	-6		
Caring But Hard Pressed	PRESSURE			6th	7
Engaged Loyal Carers	NOTIFICATION	9th	-4	9th	-4
Engaged Loyal Carers	WATER RESOURCES	5th	6		
Engaged Loyal Carers	PRESSURE	17th	-11	14th	-7
Engaged Loyal Carers	SUSTAINABILITY	6th	7	6th	7
Don't Bother Me	PLANNING	7th	-3		
Don't Bother Me	WATER RESOURCES	13th	-8	12th	-7
Don't Bother Me	ACCURATE BILLS	6th	4		
Don't Bother Me	PRESSURE	4th	9	5th	7
Savvy Switchers	WATER RESOURCES			3rd	3
Savvy Switchers	BILL SUPPORT	10th	-4		

Meter status

Metered	BILL SUPPORT	10th	-5		
Metered	ACCURATE BILLS	6th	6		
Unmetered	BILL SUPPORT	5th	5		
Unmetered	ACCURATE BILLS	12th	-6		

- Cells highlighted in green/red in the subsequent tables indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 - the difference between priority scores is statistically significant at the 10%
- Significant differences are broadly in line with those observed in Year 1:
 - Water resources and Sustainability ranked higher by Segment B type
 - Water resources ranked lower by Segment E and Segment A types
 - Pressure ranked higher by Segment E type
 - Bill support ranked higher by Unmetered

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN SERVICE ISSUES & VULNERABILITY STATUS

Segment	Initiative	Uninformed		Informed	
		Rank	Difference	Rank	Difference

Service issue

Query about bill	ACCURATE BILLS	5th	3		
Query about meter	BILL SUPPORT	14th	-7		
Discolouration	SERVICE SUPPORT			5th	5
Discolouration	SUSTAINABILITY			6th	5
Change to taste/smell	QUICK RESOLUTION	7th	7		
Limescale	NOTIFICATION	8th	-3		
Limescale	HARDNESS			5th	5
Loss of supply	NOTIFICATION			12th	-7
Loss of supply	SUSTAINABILITY	4th	8		
Low pressure	PRESSURE			5th	7
Traffic disruption	NOTIFICATION	12th	-7		
Traffic disruption	BILL SUPPORT	11th	-5		

Vulnerability

Vulnerable	BILL SUPPORT	4th	8	5th	7
Vulnerable	SERVICE SUPPORT	6th	7	6th	7
Vulnerable	PRESSURE			12th	-5
Not vulnerable	BILL SUPPORT	12th	-8	12th	-7
Not vulnerable	SERVICE SUPPORT	13th	-7	13th	-7
Not vulnerable	PRESSURE			7th	5

- Cells highlighted in green/red in the subsequent tables indicate **significant differences across segments**, defined as meeting the following criteria, which combine practical and statistical significance:
 - a rank difference of at least 3 places between any segment and the complement 'Other' (e.g., social grade A/B vs C1/C2/D/E combined);
 - at least one initiative is in the top third of the ranking (1st to 7th rank);
 - the difference between priority scores is statistically significant at the 10%
- Differences for 'Query about bill', 'Change to taste/smell', 'Limescale', and 'Low pressure' broadly in line with expectations
- Year 2 on Year 1 comparisons problematic due to small bases, especially in Year 1
- Bill support and Service support ranked higher by vulnerable customers, as in Year 1
- NB Not included due to small base: Customer service complaint; Flooding from a burst pipe; Hose pipe ban

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN VULNERABILITY STATUS

Segment	Initiative	Uninformed		Informed	
		Rank	Difference	Rank	Difference

Vulnerability

Vulnerable	BILL SUPPORT	4th	8	5th	7
Vulnerable	SERVICE SUPPORT	6th	7	6th	7
Vulnerable	PRESSURE			12th	-5
Not vulnerable	BILL SUPPORT	12th	-8	12th	-7
Not vulnerable	SERVICE SUPPORT	13th	-7	13th	-7
Not vulnerable	PRESSURE			7th	5

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

OTHER AREAS OF FOCUS FOR SSW/CAM

WHAT IS MISSING FROM THE ATTRIBUTES?

Overall, 6% of customers though there are areas of high priority SSW/CAM failed to include in the survey. This figure is significantly higher in Y2 (7%) when compared to Y1 (4%).

OTHER AREAS OF FOCUS

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



In year 2, some customers seemed to be more aware of the negative impact caused by water companies. There has been negative news coverage about sewage discharge and pollution in the news in the last 12 month. Four participants specifically mentioned CSO activities

What's missing? - Accountability of water companies

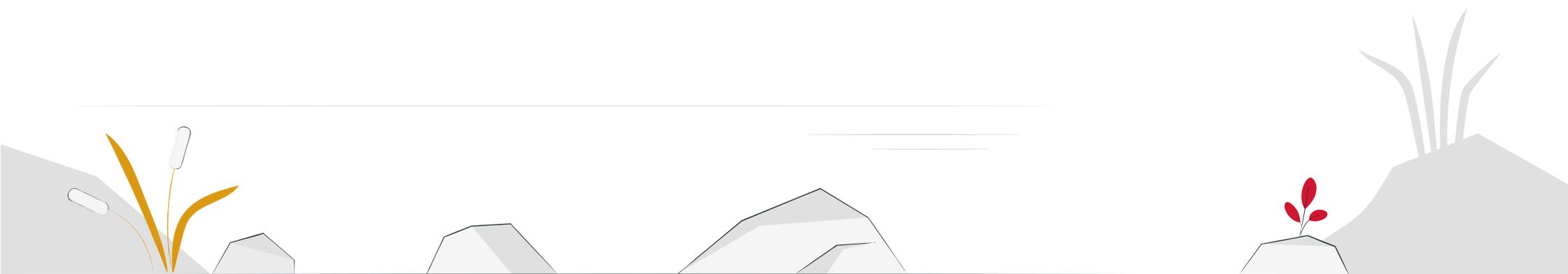
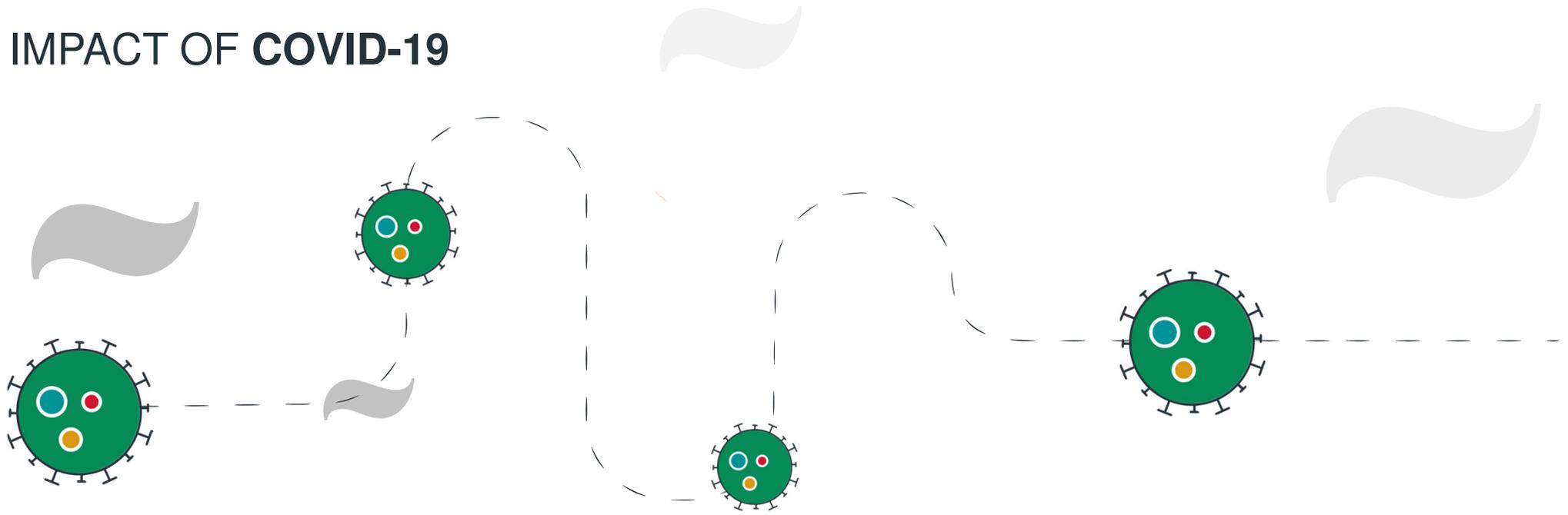
Cambridge Water should be fined very hard for any leak and customers should have massive reductions in their bills for every leak.

To be honest when people's water has become infected with unhealthy pathogens.

Put pressure on Anglian Water to stop discharging untreated sewerage into rivers.

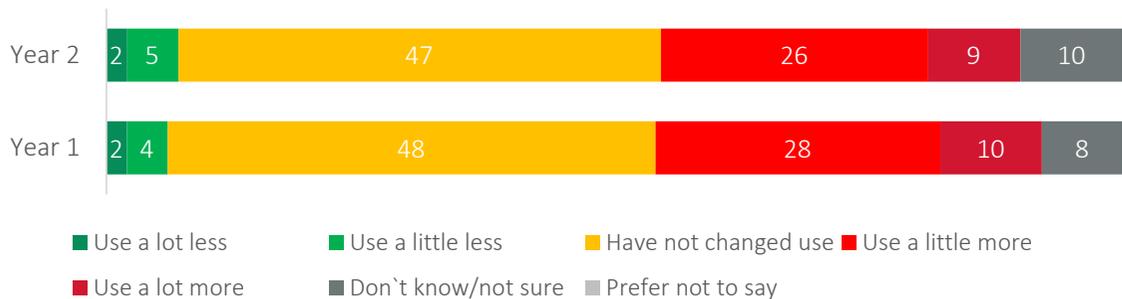
They should communicate accurately and promptly about dangerous contamination of the water supply.

IMPACT OF COVID-19



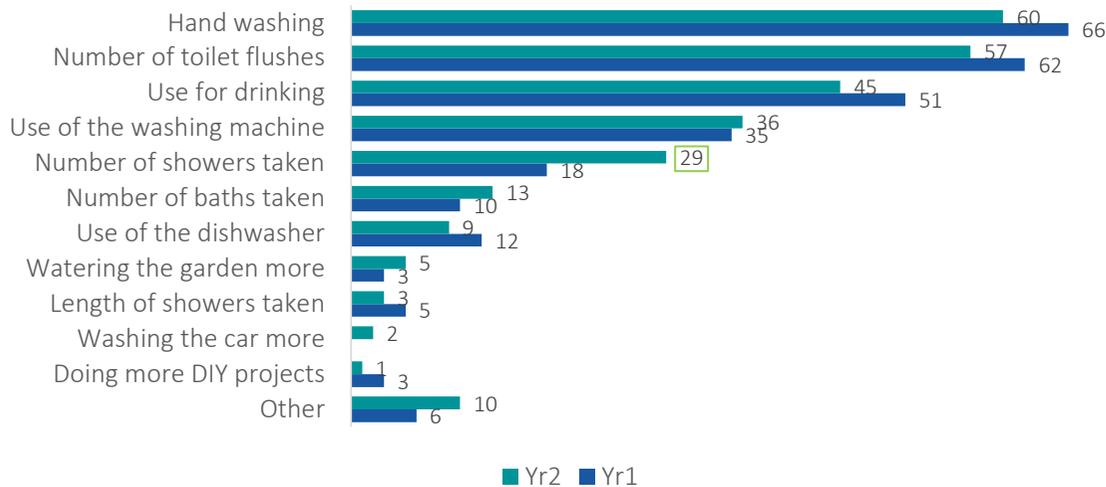
CHANGES IN WATER CONSUMPTION AT HOME SINCE THE START OF THE PANDEMIC

A significant proportion of customers have seen their water consumption at home increase since the start of the pandemic. This proportion has decreased slightly after year 1 but not significantly.



- In year 2, 35% of all customers report increasing their water consumption at home since the start of the pandemic (decreased by 3% since Yr1)
- Younger customers (18 to 49 yrs) are significantly more likely to have seen their water consumption increase than older customers (65 yrs +)
- Customers in AB are significantly more likely to report an increase in their water consumption than DE

What's led to the increase in water usage at home...



- Reasons for increases in water usage are consistent between year 1 and year 2, but there is one significant difference
 - Those in year 2 (29%) were significantly more likely to state number of showers taken as a reason for increase in water usage compared to those in year 1 (18%)
- As a whole (both Yr1 and Yr2), customers in SSW were more likely to use the washing machine while CAM reported higher number of toilet flushes.

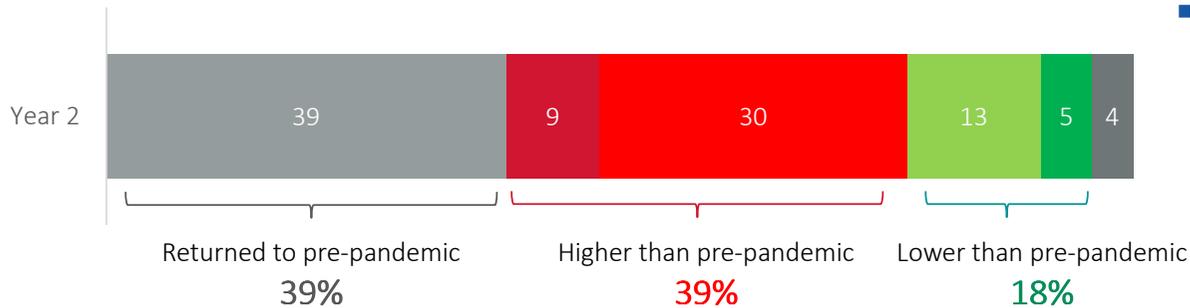
CHANGES IN WATER CONSUMPTION

RETURNING TO PRE-PANDEMIC LEVEL

Around 2 in 5 of customers reported their water consumption has returned to pre-pandemic levels, and the same proportion still think they used more water than before. 1 in 5 reported they used less than April 2020.

Now that we're 18-24 months on from the start of the first COVID-19 lockdown do you think your water usage at home has returned to pre-pandemic levels?

- Yes - it's now about the same
- No - it's a lot higher than it was
- No - it's now slightly higher than it was
- No - it's now slightly lower than it was
- No - it's now a lot lower than it was
- Don't know



- Customers in CAM and younger customers (18-34) were significantly more likely to report a slightly higher than pre-pandemic water usage.
- Metered customers were significantly more likely to say they use a lot more now than pre-pandemic.
- Female & customers in social grade DE and those unmetered reported a "a lot lower" than pre-pandemic level of water consumption.

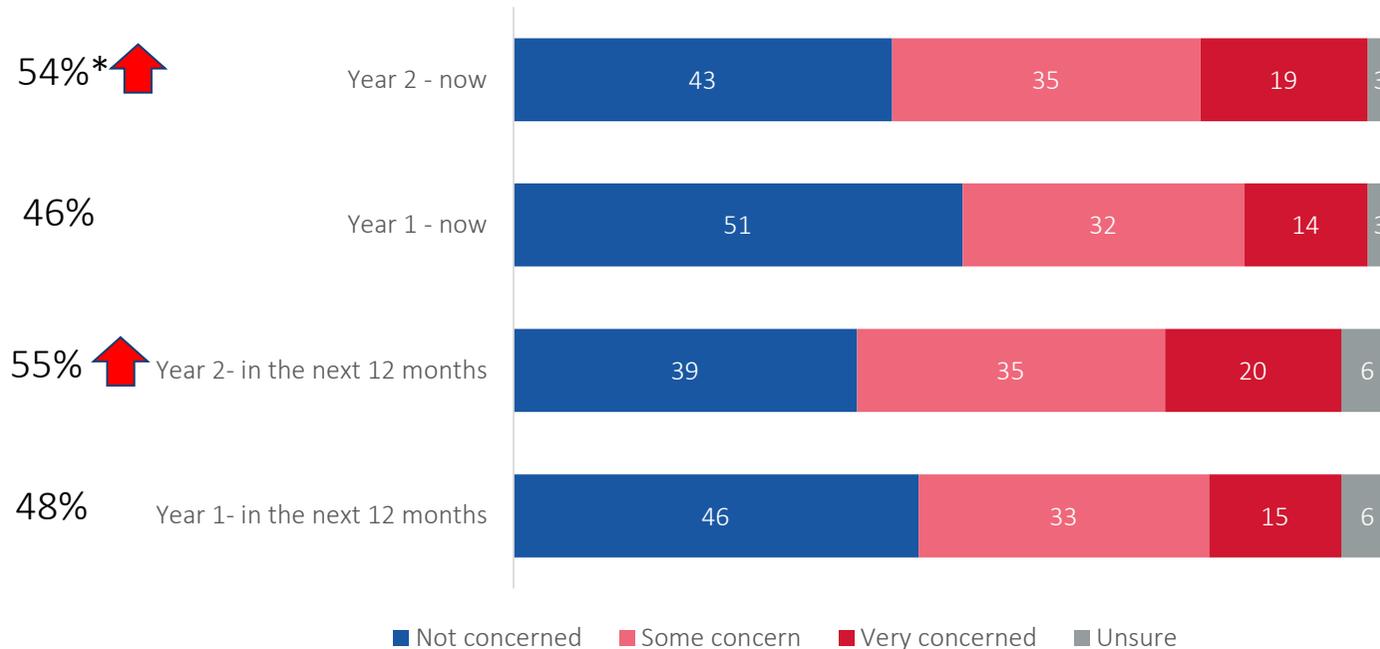
FINANCIAL CONCERN AS A RESULT OF THE PANDEMIC

A significantly higher proportion of customers in Y2 reported concerns with paying their household bills when compared to year 1. This applied to both now and when thinking about the next 12 months.

CONCERNS ABOUT HOUSEHOLD BILLS

Significant differences:

- Not concerned about ability to pay household bills **now**: CAM, 65+, Male, SEG AB and C2.
- Some concern about ability to pay household bills **now**: female, SEG C2, Unmetered
- Very concerned about ability to pay household bills **now**: SSW, 35-49 yrs, SEG DE
- Not concerned about ability to pay household bills **in next 12 mths**: CAM, 65+, Male, SEG AB and C2, SEGMENT B
- Some concern about ability to pay household bills **in next 12 mths**: female
- Very concerned about ability to pay household bills **in next 12 mths**: SSW, 35-49 yrs, SEG C2, DE



54%*

Year 2 - now

46%

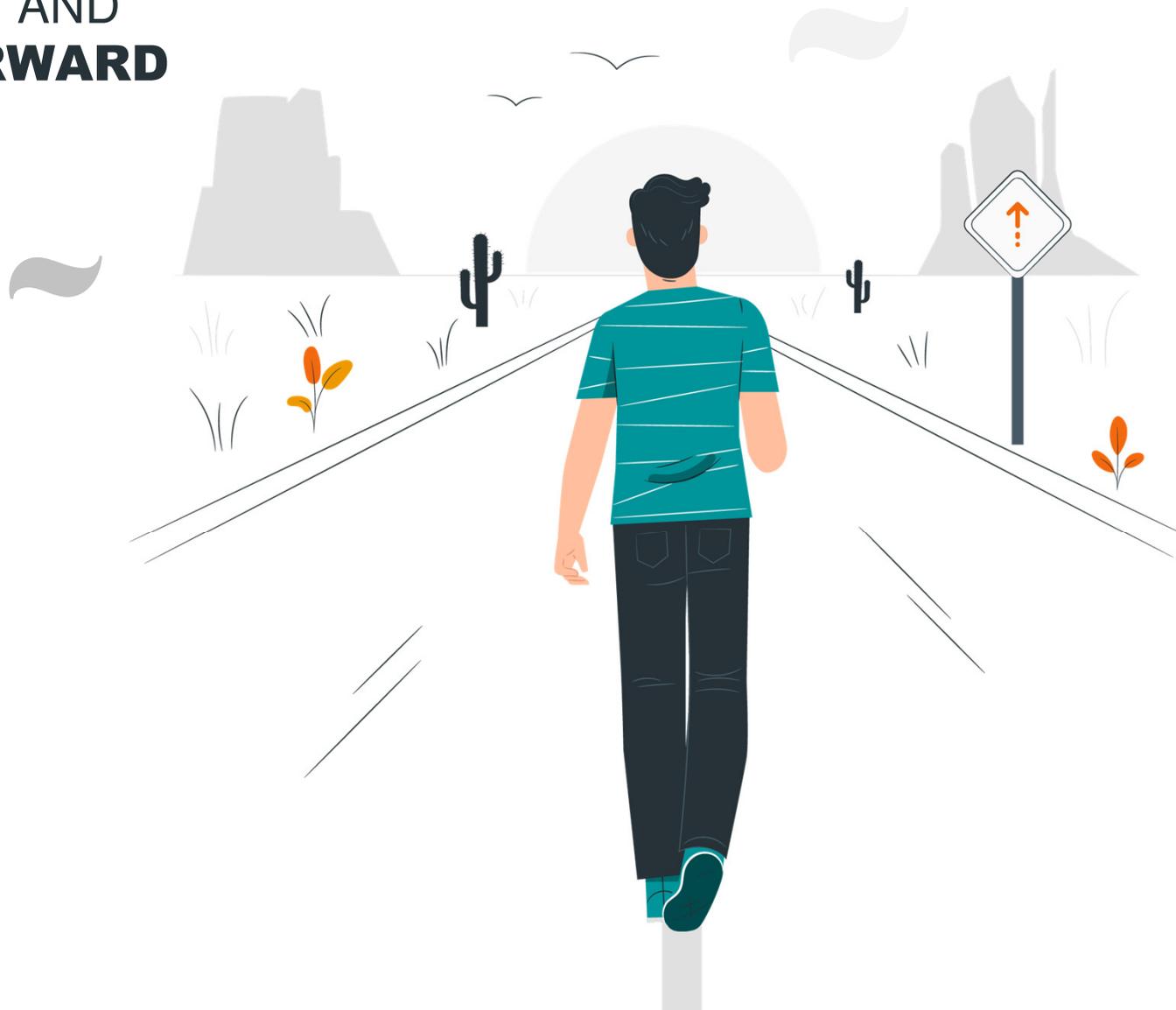
Year 1 - now

55% Year 2 - in the next 12 months

48% Year 1 - in the next 12 months

* Figures sum the % proportion of customers saying "some concern" and "very concerned"

SUMMARY AND WAY FORWARD



SUMMARY

- ✓ Priorities have remained consistent between the qualitative and quantitative research
- ✓ Reliable high quality water supply, affordability, leakage and long term planning remain the top 4 priorities mentioned spontaneously and through the prioritisation exercises (uninformed and informed)
- ✓ This reflects the core hygiene priorities identified during the latest year 2 qualitative work
- ✓ Spontaneous priorities from the quantitative survey fall into similar categories as those mentioned by customers during the qualitative work
- ✓ BUT mostly focussed on hygiene and enhancing initiatives with no “above & beyond” and few “future” priority areas spontaneously identified by the quantitative sample
- ✓ Around 2 in 5 of customers reported their water consumption has returned to pre-pandemic levels, and the same proportion still think they now use more water than before
- ✓ A significantly higher proportion of customers in Y2 reported concerns with paying their household bills when compared to year 1. This applied to both now and when thinking about the next 12 months



ATTRIBUTE RANKINGS

SUMMARY OF PRIORITY RANKINGS - MIRRORS QUALITATIVE RESEARCH

UNINFORMED INFORMED

	UNINFORMED	INFORMED
 RELIABILITY OF WATER QUALITY	1	1
 BILL AFFORDABILITY	2	2
 LEAKAGE REDUCTION	3	3
 LONG-TERM SUPPLY PLANNING	4	4
 SENDING INCIDENT NOTIFICATIONS	5	6
 PROTECTING WATER RESOURCES	6	5
 FINANCIAL BILL SUPPORT	7	7
 ACCURATE AND INFORMATIVE BILLS	8	12
 MITIGATING WATER HARDNESS	9	8
 SERVICE SUPPORT (VULNERABLE PSR)	10	8

Future
Enhancing Plus

Above &
beyond

Enhancing

Hygiene

UNINFORMED INFORMED

	UNINFORMED	INFORMED
 SUSTAINABLE BUSINESS POLICES	11	11
 WATER PRESSURE	12	10
 WATER RECYCLING / RE-USE	13	12
 QUICK RESOLUTION OF ISSUES	14	14
 IMPROVE LOCAL ENVIRONMENT	15	13
 WATER SAVING INCENTIVES	16	15
 EDUCATION OF FUTURE CUSTOMERS	17	16
 MORE REGULAR METER READINGS	18	16
 WIDE RANGE OF WAYS TO CONTACT	19	16
 COMMUNITY SUPPORT - GRANTS	20	20

LITERATURE REVIEW

FOUR CORE RECOMMENDATIONS

1

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



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



Use MaxDiff method in order to ensure priorities

2

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



Consider aggregation and equity issues



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

3

MaxDiff design used to provide relative priorities in the quantitative study

4

SSC undertaking insight triangulation project which this insight will inform



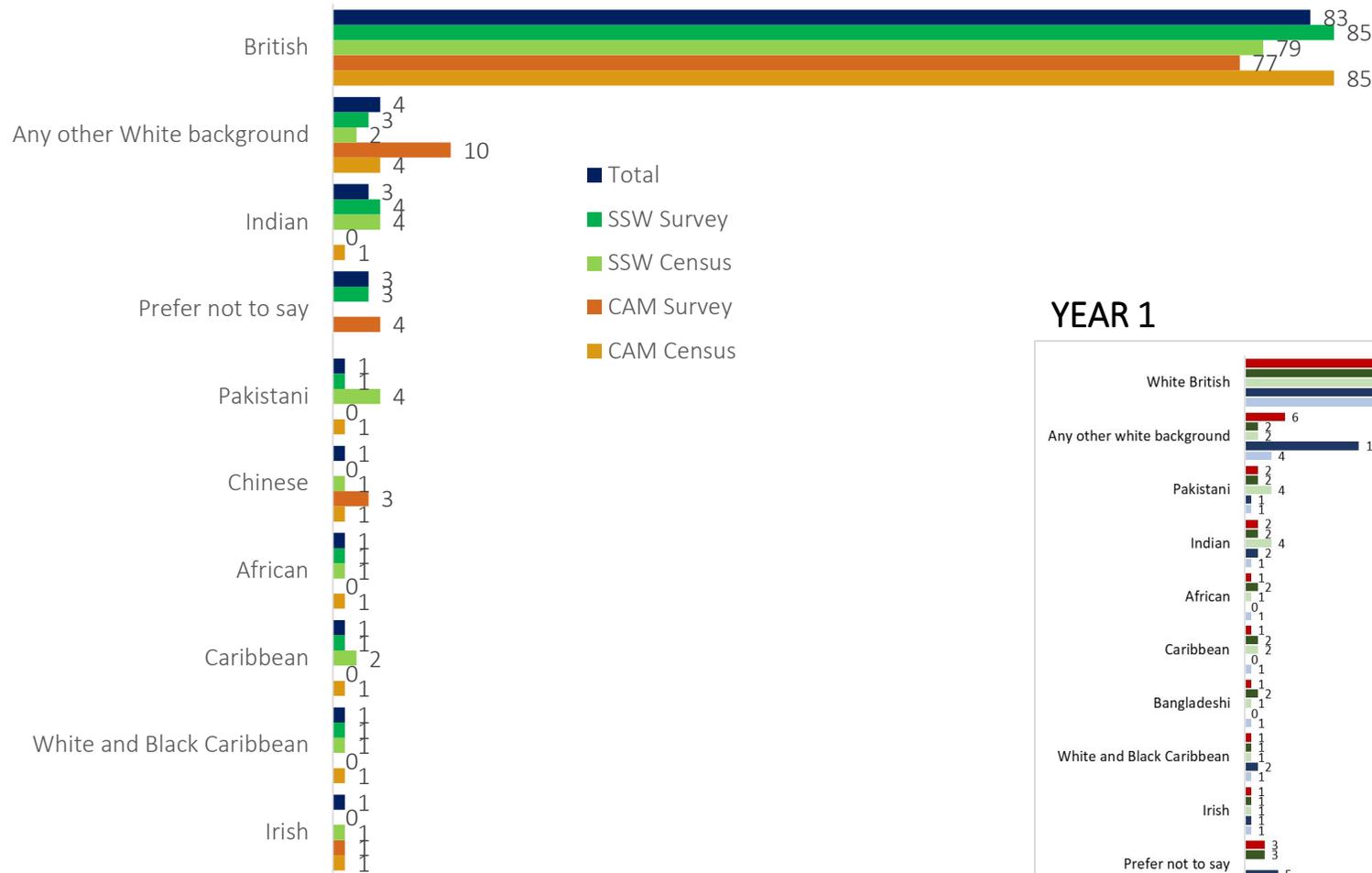
APPENDIX A PARTICIPANT ETHNICITY & ATTITUDINAL SEGMENT



PARTICIPANT CHARACTERISTICS

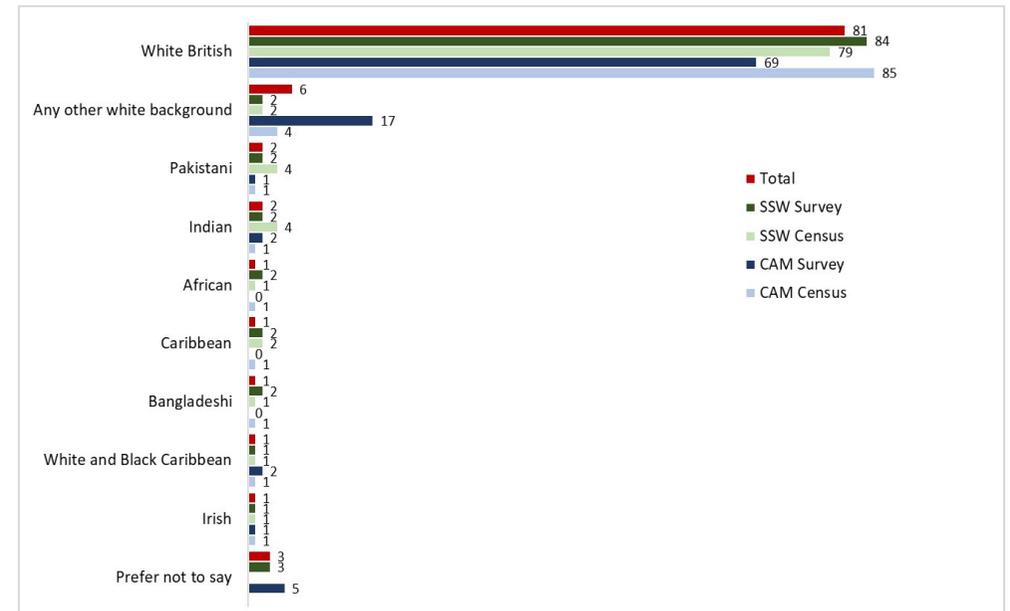
ETHNICITY

YEAR 2



While there are less drastic gaps between CENCUS and survey sample in year 2, the overall differences between CENCUS and survey sample in year 1 was smaller.

YEAR 1



PARTICIPANT CHARACTERISTICS

ATTITUDINAL SEGMENT YEAR 2

Customer Segment %	Overview of segment	Original Segmentation PR19 - 2018	Reworked Segmentation - July 2021	Year 2 priority	Year 1 priority
A	Very time pressed juggling all their commitments. Consequently don't think much about their water usage and don't want their time wasted. Often online.	24	23	25	21
B	Highly engaged with their water usage and the wider community they live in. Expect a very high level of service from companies they use. Use technology, but prefer a personal relationship.	24	35	35	37
C	Often financially and time pressured. Strong preference for being on-line and using social media.	16	15	14	15
D	Highly engaged with using the 'latest' technology and managing their lives online. Switched on to saving water.	9	8	8	7
E	Highly engaged with technology and very focused on their network of family and friends. Admit to not thinking much about their water usage or services and prefer a more transactional relationship with their water company.	27	18	18	20

APPENDIX B

QUESTIONNAIRES



3410
SSC Priorities Tracker: Year 2

Given the challenges we have all faced over the last year and with 2022 set to be equally challenging, South Staffs Water/Cambridge Water appreciates you taking the time to tell them the things that are important for you and your household and the wider communities the company serves – now and in the future.

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

ADD FOR SSC SAMPLE ONLY: We appreciate the time you'll spend giving your feedback for South Staffs Water/Cambridge Water. As a thank you we'd like to provide you with £5, which you can accept either as a Love2Shop voucher or as a donation to charity. We'll ask you which is your preferred option at the end of the interview. You must complete the full feedback survey to be eligible to receive the £5 offer.

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

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

Yes
 No **THANK AND CLOSE**

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

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

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

Yes **THANK & CLOSE**
 No

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

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

WS
 WV
 CV

SG

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

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

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

Q12. **ALLOCATE TO COMPANY:**

Cambridge Water
 South Staffs Water

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

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

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

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

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

Q6. **IF Error! Reference source not found.=10 (RETIRED). OTHERS GO TO Q8:** Does the main income earner have a state pension, a private pension or both?



APPENDIX B

QUESTIONNAIRES

State only
Private only
Both

Q7. IF Q6 = PRIVATE OR BOTH. OTHERS GO TO Q8: How would you describe the main income earner's occupation before retirement?

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

Q8. SEG: CODE AS FOLLOWS:

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

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

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

Q9. Are you:

Male
Female
Prefer to self-identify / Other
Prefer not to say

Q10. DELETED QUESTION

Q11. DELETED QUESTION

Q12. DELETED QUESTION

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

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

Thanks, you're good to go

This survey is all about the service you receive from your water company, South Staffs Water/Cambridge Water. They are only responsible for the water services to your home, that's the water that comes through your taps. They are not responsible for your sewerage services, which are provided by Severn Trent Water (IF SOUTH STAFFS CUSTOMER)/Anglian Water (IF CAMBRIDGE WATER CUSTOMER).

Remember, if you fully complete the survey, we'd like to provide you with £5 which you can accept either as a Love2Shop voucher or as a donation to charity.

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

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

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

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

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

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

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

APPENDIX B

QUESTIONNAIRES

Q17. Have you experienced any of the following in the last 2 to 3 years? MULTICODE

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

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

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

Understanding what's important

Q18. Customers have consistently told us through all the feedback that the top two priorities they want and expect South Staffs/Cambridge Water to deliver are a reliable supply of good quality water at an affordable price.

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

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

What's your number one priority

Q19. And now imagine that they have met your number one priority, or have plans to do so shortly. What else do you want them to focus on?

What's your number two priority

We're now going to show you a series of questions covering some areas that South Staffs Water/Cambridge Water could focus on investing the money from customers' bills into.

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

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

At this stage we aren't going to give you any other information to help you make your choices. We just want your initial views based on what you might already know about your water services and what's important to you. There are 20 areas in total and each will only appear once across the five screens.

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

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

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

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

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

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

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

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

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

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

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

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

APPENDIX B

QUESTIONNAIRES

ATTRIBUTE DESCRIPTION: They provide incentives to customers who use less water – for example, tariffs that are lower if you use water outside of times of peak demand

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

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

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

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

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

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

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

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

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

Q20. MaxDiff1: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q21. To help us understand your choices, please tell us why you selected #insert most important attribute selected at MaxDiff1# as the most important area for South Staffs Water/Cambridge Water to focus on?

Q22. DELETED QUESTION

Q23. MaxDiff2: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q24. MaxDiff3: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q25. MaxDiff4: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q26. MaxDiff5: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q27. DELETED QUESTION

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

Yes

No **GO TO ERROR! REFERENCE SOURCE NOT FOUND.**

Q29. What other area(s) do you think South Staffs Water/ Cambridge Water should focus on?

Q30. This is an important study and we want to find out if people can understand the questions, so we would now like to ask you for feedback about the choices you have just made.

To what extent do you agree with the following statements about the choices you have just made

SINGLE CODE

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree	Don't know
I was able to understand the choices I was faced with						
I found the options to be believable						
I found it easy to choose between the options I was presented with						

Q31. **ASK IF CODE 1 OR 2 AT ERROR! REFERENCE SOURCE NOT FOUND..1 ASK:** What did you find difficult to understand?

Q32. **ASK IF CODE 1 OR 2 AT ERROR! REFERENCE SOURCE NOT FOUND..2 ASK:** Which options did you find unbelievable?

Q33. **ASK IF CODE 1 OR 2 AT ERROR! REFERENCE SOURCE NOT FOUND..3 ASK:** Which options did you find it difficult to choose between?

About South Staffs Water/Cambridge Water

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

APPENDIX B

QUESTIONNAIRES

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

INSERT INFORMATION: one slide per screen

[J:\3410 S Staffs Priorities Tracker\DTP\Yr 2 Quant\3410pn10_Priorities Tracker Quant Stim_CAM_v5.pptx](#)
[J:\3410 S Staffs Priorities Tracker\DTP\Yr 2 Quant\3410pn09_Priorities Tracker Quant Stim_SSW_v5.pptx](#)

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

Screen 1: 7 seconds
Screen 2: 10 seconds
Screen 3: 10 seconds

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

NEW PAGE

South Staffs/Cambridge Water is regulated by Ofwat and has to submit a Business Plan every five years that outlines the services they will provide, the improvements they will make to these and how much customers will pay for them. Their current plan runs from 2020 to 2025 and is grouped into five main areas:

[..\DTP\Yr 1 Quant\Daisy evolution May 2020.jpg](#)

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

NEW PAGE

We're now going to show you another series of questions showing the areas that South Staffs Water/Cambridge Water could focus on. Like last time, for each question we'll show you four different areas at a time and would like you to tell us which you think is the most important for South Staffs Water/Cambridge Water to focus on and which is the least important.

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

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

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

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

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

INFO BUTTON TEXT: South Staffs Water/Cambridge Water is responsible for making sure your water has no unpleasant taste or smell and that there are no bacteria, viruses, chemicals or micro plastics in it. In 2020/21, 7.8 out of every 10,000 properties had to contact their water company about the appearance of their water. This is an improvement on the figure of 9.2 of every 10,000 properties recorded the year before.

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

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

INFO BUTTON TEXT: The area you live in has harder water than average when compared with other parts of England and Wales. South Staffs Water/Cambridge Water offers advice on how customers can prevent limescale build-up in their appliances and what they can do to soften their own water supply. But the company does not currently offer financial support for those customers who buy their own water filters or softening systems.

The company's independent surveys show that during the year 2021/22 14%/49% of customers in the South Staffs Water/ Cambridge Water region are dissatisfied with the hardness of their water, an increase on the figure from last year.

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

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

Although most customers will experience no interruption to their water supply in a typical year your water company counts the number of properties that are affected and the length of time they were without water. Using this approach, in 2020/21, the average supply interruption time across all customers works out as 4 minutes 36 seconds, which is slightly worse than the figure of 3 minutes 21 seconds the year before. This was mainly due to a colder winter causing more pipes to burst.

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

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

An independent survey in 2021/22 shows that 7 of every 100 customers said that they are dissatisfied with the pressure of their water supply, a slight increase from the figure of 5 of every 100 the year before.

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

APPENDIX B

QUESTIONNAIRES

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

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

Currently 20% #SOUTH STAFFS WATER# 16% #CAMBRIDGE WATER# of treated water is lost to leaks each day. This is the same as #SOUTH STAFFS WATER# slightly better #CAMBRIDGE WATER# than the national industry average, which is 20%.

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

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

Your water company currently holds mobile numbers for six out of 10 of its customers and the app is used to receive alerts and updates by over 46,000 of the 562,000 #SOUTH STAFFS WATER# by over 9,500 of the 135,000 #CAMBRIDGE WATER# properties they serve.

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

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

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

INFO BUTTON TEXT: Regular investment in this area is needed to make sure customers can always contact South Staffs Water/Cambridge Water easily through a number of different channels, from phone to online services and that any queries or problems are responded to quickly and with the minimum of effort for customers.

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

ATTRIBUTE DESCRIPTION: They provide a wide range of ways to contact and interact with them so that any customer can easily access their services and support.

Regular investment is needed to make sure that online services (such as the website) work effectively on all computer and mobile devices and that all customers, including those with special needs or who can't use online services, can contact the company using the best method for them. The range of options

currently available includes phone, letter, email, mobile app, webchat, #SOUTH STAFFS WATER# in person at the Community Hub in Wednesbury and #ALL# (COVID-19 safe) home visits.

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

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

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

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

ATTRIBUTE DESCRIPTION: They provide incentives to customers who use less water – for example, tariffs that are lower if you use water outside of times of peak demand

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

- awarding customers points for every litre of water they save over a 12-month period; at the end of the year, all the points would be converted into money and used to fund local community projects.
- offering the best prices to customers who use less than 100 litres of water per person a day over the course of any year. During 2020/21, the average was 152 litres per person a day (up from 128 the year before) #SOUTH STAFFS WATER# 151 litres per person a day (up from 128 the year before) #CAMBRIDGE WATER#. Feedback from industry reports and customers about how they use water at home shows the increase over the last year is mainly due to the impact of the COVID-19 pandemic and the lockdowns introduced by the Government.

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

ATTRIBUTE DESCRIPTION: They focus on becoming a sustainable business that reduces the environmental impact of its operations

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

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

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

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

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

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

ATTRIBUTE DESCRIPTION: They pro-actively work with households and developers to adopt approaches to re-use water – i.e. rainwater harvesting and 'grey' water recycling

INFO BUTTON TEXT: South Staffs Water/Cambridge Water could invest more in offering free devices, such as water butts, on a large scale. The company could also do more to promote grey water recycling systems. These systems collect the water you've used in your sinks, dishwashers, showers and baths, then clean it and plumb it straight back into your toilet, washing machine or outside tap. This means you would have two water supplies – you would use your 'clean' water supply for cooking, drinking and washing; and your recycled water supply for flushing toilets or in your washing machine.

If successful, these initiatives should help to reduce the average volume of water the average person uses each day to 80 litres (down from the current figure this year of 150 #SOUTH STAFFS WATER# 147 #CAMBRIDGE WATER#). Your water company is currently working with developers to make sure that at least five of every 100 new homes built each year will have access to grey water recycling systems.

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

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

There are currently more than 49,000 customers on this register. The company also now offers a proactive service to over 2,600 of the most vulnerable customers to ensure they receive the right level of support.

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

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

There are currently just over 43,200 customers on the Assure tariff; they benefit from discounted water bills of 60% in the first year after applying and 40% in the second year. The company estimates that around half of households who would qualify and benefit for financial support are currently on a discounted tariff.

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

INFO BUTTON TEXT: South Staffs Water/Cambridge Water currently has one member of staff who visits primary schools to focus on educating young people on why and how they can reduce how much water they use. This is to help ensure we all use water responsibly. The company's education programme includes class workshops and assemblies; they are now available online following the COVID-19 outbreak.

Between 1 April 2020 and 31 March 2021, almost 6,700 pupils from across the company's supply area took part in the educational programme.

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

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

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

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

INFO BUTTON TEXT: Typical water bills in the South Staffs Water/Cambridge Water area are currently the fourth/third lowest out of the 19 water companies in England and Wales. 54% of the bill you pay goes to Severn Trent Water, which provides sewerage and drainage services #SOUTH STAFFS WATER# 61% of the total bill you pay goes to Anglian Water, which provides sewerage and drainage services #CAMBRIDGE WATER#.

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

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

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

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

APPENDIX B

QUESTIONNAIRES

- Q34. MaxDiff7: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:
-
- Q35. To help us understand your choices, please tell us why you selected #insert most important attribute selected at MaxDiff1# as the most important area for South Staffs Water/Cambridge Water to focus on?
-
- Q36. Was there anything in the information you read about that influenced each of your choices?
-
- Q37. MaxDiff8: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:
-
- Q38. MaxDiff9: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:
-
- Q39. MaxDiff10: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:
-
- Q40. MaxDiff11: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:

Q41. DELETED QUESTION

Impact of Covid-19

We'd now like to ask you a few questions about how things have changed for you since the start of the Coronavirus global pandemic. Thank you for sharing your circumstances with us as it helps us better understand your earlier answers. If you feel uncomfortable answering some of these questions, please feel free to tick 'Prefer not to say'.

- Q42. Thinking back to the start of the first COVID-19 pandemic lockdown in March 2020, did you see any changes in how much water you/your household used at home?
- Yes: I/we used a lot less
 Yes: I/we used a little less
 No: I/we didn't change the amount I/we used
 Yes: I/we used a little more
 Yes: I/we used a lot more
 Don't know/not sure
-
- Q43. **ASK IF CODES 1, 2, 4 OR 5 AT Q42. OTHERS GO TO ERROR! REFERENCE SOURCE NOT FOUND.:** Now that we're approximately 24 months on from the start of the first COVID-19 lockdown do you think your water usage at home has returned to pre-pandemic levels?
- Yes – it's now about the same
 No – it's a lot higher than it was
 No – it's now slightly higher than it was

No – it's now slightly lower than it was
 No – it's now a lot lower than it was
 Don't know

Q43a. Why do you say this?

DO ADD TEXT BOX

Q44. DELETED QUESTION

Q45. DELETED QUESTION

Q46. Which of the following most closely represents what outlook for your household income over the next year?

I anticipate my/our household income will increase over the next year
 I anticipate my/our household income will remain the same over the next year
 I anticipate my/our household income will reduce slightly over the next year
 I anticipate my/our household income will reduce significantly over the next year
 Not sure yet

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

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

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

	Not concerned	Some concern	Very concerned	Unsure
Before the pandemic				
Now	1	2	3	
In the next 12 months	1	2	3	

Finally, a bit more about you

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

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

1=STRONGLY DISAGREE/10=STRONGLY AGREE

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

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

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

APPENDIX B

QUESTIONNAIRES

I/we're careful about how much we use because I/we don't think we should waste water

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

Yes **GO TO 50B**
 No
 Prefer not to say **GO TO Q50B**
 Don't know

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

Yes
 No
 Prefer not to say
 Don't know

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

SINGLE CODE

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

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

	Per Week	Per Year
A	Up to £315	Under £16,380
B1	£316-£442	£16,381 - £23,000
B2	£443-£721	£23,001 - £37,500
B3	£722-£1000	£37,501 - £52,000
C	£1001+	£52,001+
D	Prefer not to say	

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

1	Yes, myself	ON BENEFITS
2	Yes, someone in my household	

3	No	
4	Prefer not to say	

Q53. **DELETED QUESTION**

Q54. Which of these ethnic groups do you consider you belong to?

WHITE

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

MIXED

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

ASIAN OR ASIAN BRITISH

8. Indian
9. Pakistani
10. Bangladeshi
11. Any other Asian background

BLACK OR BLACK BRITISH

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

CHINESE OR OTHER ETHNIC GROUP

15. Chinese
16. Any other ethnic group

Prefer not to say

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

Yes
 No

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

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

Yes
 No

Q56a **DYNATA SAMPLE ONLY:** Would you like to join South Staffs Water's/Cambridge Water's online community, called H₂Online. The community allows customers to take part in activities to help

APPENDIX B

QUESTIONNAIRES

shape their future plans and also hear about how this feedback is being used to improve the service. If you are interested, please click the link below:

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

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

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

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

Yes
No

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

Yes
No

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

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

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

SYSTEM INFORMATION
Time interview completed:

APPENDIX C

STIMULUS MATERIALS - CAM

About Cambridge Water



- Serves 357,600 people across 1,175sq km
- Supply approx. 137,600 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day
- Drinking water comes from 23 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- Cambridge Water is **NOT** responsible for treating wastewater in your area. That is the responsibility of Anglian Water

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

- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall



Cambridge Water's and South Staffs Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,580km of pipes, powered by 113 pumping stations
- Operate 41 water treatment works – 20 in the Cambridge region
- Maintenance, repairs and renewals of all these assets
- Delivering water to customers' premises and fitting water meters
- Protecting and improving the natural environment by working with landowners - i.e. wildlife, trees, plants, rivers and streams



Customer facing activities

- Read meters: 75% of customers have meters in the Cambridge region / 45% in the South Staffs
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help over 43,000 customers with discounted bills and assist when needed over 49,000 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply, or visiting a Community Hub.



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

- Increased demand for water due to:
 - population growth
 - property building/development
- Changing rainfall patterns leading to higher risk of flooding or longer periods of drought
- Changing the way resources are used:
 - some of the water taken from the rivers and other water sources could lead to a deterioration of the environment
- Further reducing leakage on the network
- Educating, informing and helping customers to use less water and reuse more
- Reducing carbon emissions
- Reducing the amount of bad plastics used in business operations
- Ensuring services are accessible to all customers who need extra support

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

APPENDIX C

STIMULUS MATERIALS - SSW

About South Staffs Water



- Serves 1.3 million people across 1,500 km²
- Supply approx. 562,000 homes and almost 34,000 business properties
- Supply 305 million litres water per day
- Drinking water comes from 2 surface water sources (River Severn and Blithfield reservoir) and 19 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- South Staffs Water is **NOT** responsible for treating wastewater in your area. That is the responsibility of Severn Trent Water
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge



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

South Staffs Water's and Cambridge Water's Responsibilities

Water supply for customers

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



Customer facing activities

- Read meters: 45% of customers have meters in the South Staffs region/75% in Cambridge
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help over 43,000 customers with discounted bills and assist when needed over 49,000 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply, or visiting a Community Hub.



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

- Increased demand for water due to:
 - population growth
 - property building/development
- Changing rainfall patterns leading to higher risk of flooding or longer periods of drought
- Changing the way resources are used:
 - some of the water taken from rivers and underground sources for human needs could lead to a deterioration of the environment
- Further reducing leakage on the network
- Reducing carbon emissions
- Reducing the amount of bad plastics used in business operations
- Ensuring services are accessible to all customers who need extra support
- Increasing number of households experiencing financial hardship / increasing levels of bad debt
- Educating, informing and helping customers to use less water and reuse more.

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

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THANK YOU!



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