



PRIORITIES TRACKER

Year 1 INSIGHTS

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THE RESEARCH JOURNEY
- **ONE STEP AT A TIME**

THE BRIEF

SSC have put together a programme of research to track customer priorities on a consistent and regular basis throughout AMP7



PRIORITIES explored through a range of methods during the first year of the tracking study

Desk Research to develop and update the view of customer priorities, and to inform the development of materials

Qualitative to understand customers informed and uninformed priorities

HH:
10 x 90 min mini digital focus groups
5 digital depths

NHH:
2 x online triads (SMEs)
5 x telephone depth interviews (large)

Quantitative to track on-going the key hierarchy of priorities and identify new trends

HH: 500 interviews:
Online undertaken in three waves in Yr1

Interim analysis after half of fieldwork completed



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

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

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



Start to understand the customer impact of CV-19



This chart pack illustrates the priorities research process and quantitative insights

511 ONLINE INTERVIEWS

TARGET 350 SSW/150 CAM ACHIEVED 364 SSW/147 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
Metered	42%	55%
Unmetered	58%	45%
CAM		
Metered	72%	72%
Unmetered	28%	28%

Gender

SSW	Target	Status
Female	51%	46%
Male	49%	54%
CAM		
Female	50%	41%
Male	50%	59%

Age

SSW	Target	Status
16-34	19%	14%
35-49	30%	14%
50-64	25%	45%
65+	26%	27%
CAM		
16-34	18%	17%
35-49	31%	21%
50-64	27%	10%
65+	25%	52%

Social Grade

SSW	Target	Status
AB	17%	31%
C1C2	51%	45%
DE	32%	24%
CAM		
AB	35%	52%
C1C2	48%	41%
DE	17%	7%

Bill Payer Status

SSW	#	%
Bill payer	360	99%
Future	4	1%
CAM		
Bill payer	147	100%
Future	0	0%

- No quotas set on future bill payers
- Future bill payers unlikely to be represented in the SSC sample

Questionnaires

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

Follow ups

- 20% opted in to H2Online signup
- 52% requested a summary of results

Quality checks:

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

Minimum targets missed for:

- CAM region: 3 short
- CAM unmetered: 4 short
- CAM 35-49: 3 short
- SSW DE: 5 short

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.



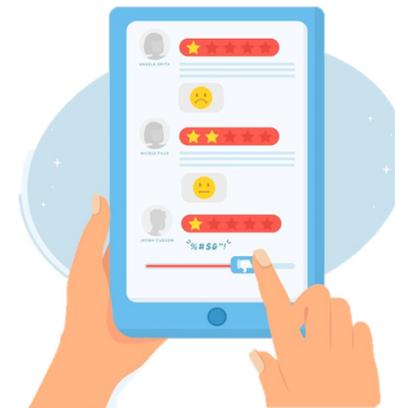
The study employed online methodology due to the following reasons:

- 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

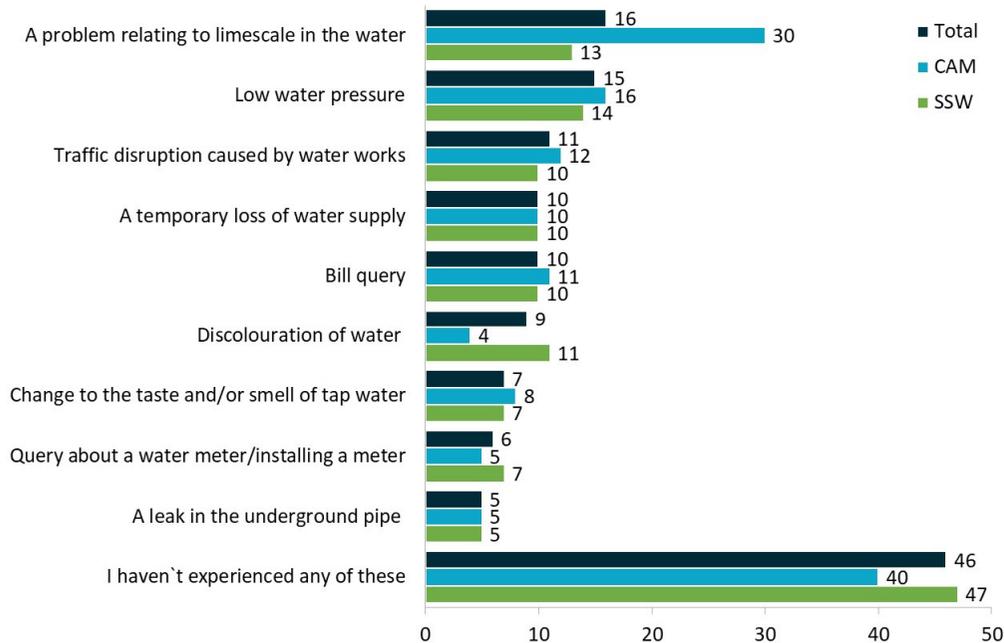
SERVICE ISSUE EXPERIENCE/VULNERABILITY

All participants completed the survey online – an even mix of SSC supplied customer sample and from Dynata’s commercial panel



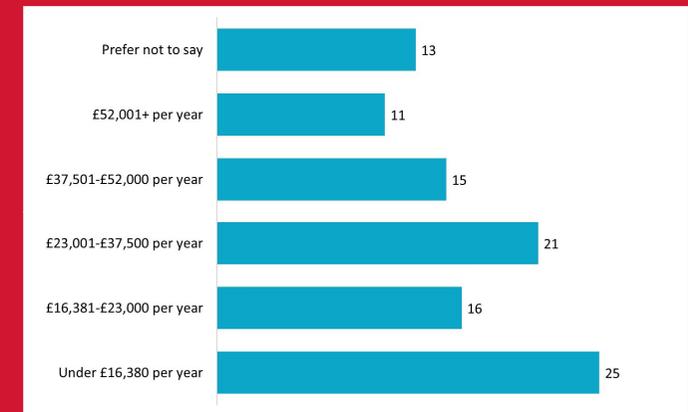
SERVICE ISSUE EXPERIENCE

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

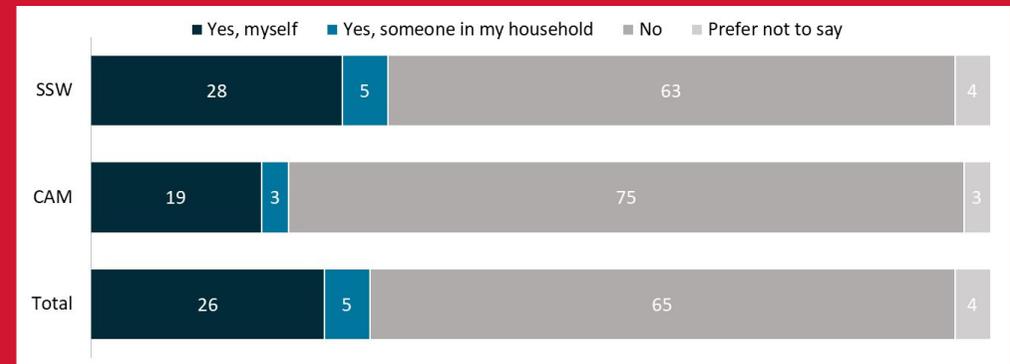


VULNERABILITY: 40% OF TOTAL SAMPLE

- 25% live in a household with an annual income under £16,300 pa
- And 9% of the sample live in a household where someone is on the SSC PSR



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



SATISFACTION, TRUST AND VALUE MONEY

CUSTOMER PERCEPTIONS

OVERALL SATISFACTION

FEMALES SIG MORE LIKELY TO RESPOND "10" COMPARED TO MALES – 39% CF 27%

VULNERABLE SIG MORE LIKELY TO RESPOND "10" THAN NON VULNERABLE – 38% CF 29%

NO SERVICE ISSUE SIG MORE LIKELY TO RESPOND "10" THAN SERVICE ISSUE – 42% CF 25%



7.96

- Overall satisfaction scored 0 to 10 where 0 = extremely satisfied and 10 = extremely satisfied
- C-Sat = 7.44 (online sample)

TRUST

FEMALES SIG MORE LIKELY TO RESPOND "10" COMPARED TO MALES – 35% CF 26%

NO SERVICE ISSUE SIG MORE LIKELY TO RESPOND "10" THAN SERVICE ISSUE – 40% CF 23%



8.11

- Trust scored 1 to 10 where 1 = I don't trust them at all and 10 = I trust them completely
- C-Sat = 7.47 (online sample)

SATISFACTION WITH VALUE FOR MONEY

VULNERABLE SIG MORE LIKELY TO RESPOND "1" COMPARED TO NON VULNERABLE – 7% CF 1%

NO SERVICE ISSUE SIG MORE LIKELY TO RESPOND "10" THAN SERVICE ISSUE – 39% CF 28%



3.94

- VFM scored 1 to 5 where 1 = very dissatisfied and 5 = very satisfied
- C=Sat = 3.59 (online sample)

LOW TRUST/SATISFACTION



HIGH TRUST/SATISFACTION

YEAR 1 (2020/21) **CUSTOMER PRIORITIES**



QUALITATIVE PRIORITIES: SUMMARY OF CHANGES SINCE 2017

NEW SPONTANEOUS PRIORITIES IN 2020 HIGHLIGHTED IN RED

ABOVE & BEYOND

- Smart meters
- Incentives and tools to save water
- Additional environment projects
- Sponsorships/grants
- Community initiatives eg: water fountains

ENHANCING

- Environmental responsibilities
- Choice of meter
- Good website
- Water conservation at home and outside
- Water usage information and control
- Education in schools
- Ongoing innovation of infrastructure
- Addressing limescale

HYGIENE

- Water quality
- Continual supply and planning for supply/demand
- Minimising leakage through repair and investment
- Affordable pricing and support for vulnerable
- Efficient customer service (if needed)
- Good communication during outage

Above & beyond

Enhancing

Hygiene

FUTURE (ENHANCING PLUS)

- Roll out smart metering programme
- Guarantee long term sustainability of water
- Better website/app provision
- Competitive market
- Carbon neutral
- Addressing climate change
- Smarter, dynamic pricing based on time of usage
- Rainwater harvesting projects
- Accessible community incentive schemes
- Monitoring of aquifer health and water sources

QUALITATIVE PRIORITIES USED TO DEFINE THE ATTRIBUTES TESTED IN THE QUANTITATIVE WORK



QUANTITATIVE SPONTANEOUS, UNINFORMED PRIORITIES

WHAT SHOULD SSW/CAM FOCUS ON

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 identified by the quantitative sample

HYGEINE

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

“ As I have multiple health related problems I would like South Staffs Water to continue prioritising me whenever there is disruption to the water supply for longer than 3 hours as I require fresh or sterilised (by boiling it) water several times a day for some of my health issues ”

“ Being able to speak to someone directly on the phone about billing is a good thing and really important ” this continues

“ Carry on supplying safe clean water ”

“ Continue the hard work seeking, finding and curing leaks ”

ENHANCING

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

“ Good pressure it’s really gone down over the last few years and can be sporadic sometimes. But I have lived abroad so don’t get me wrong I feel it’s better than a lot of places ”

“ Make it more sustainable and climate friendly ”

“ I wish the water wasn't so hard, but it's the area nothing to do with Cambridge Water ”

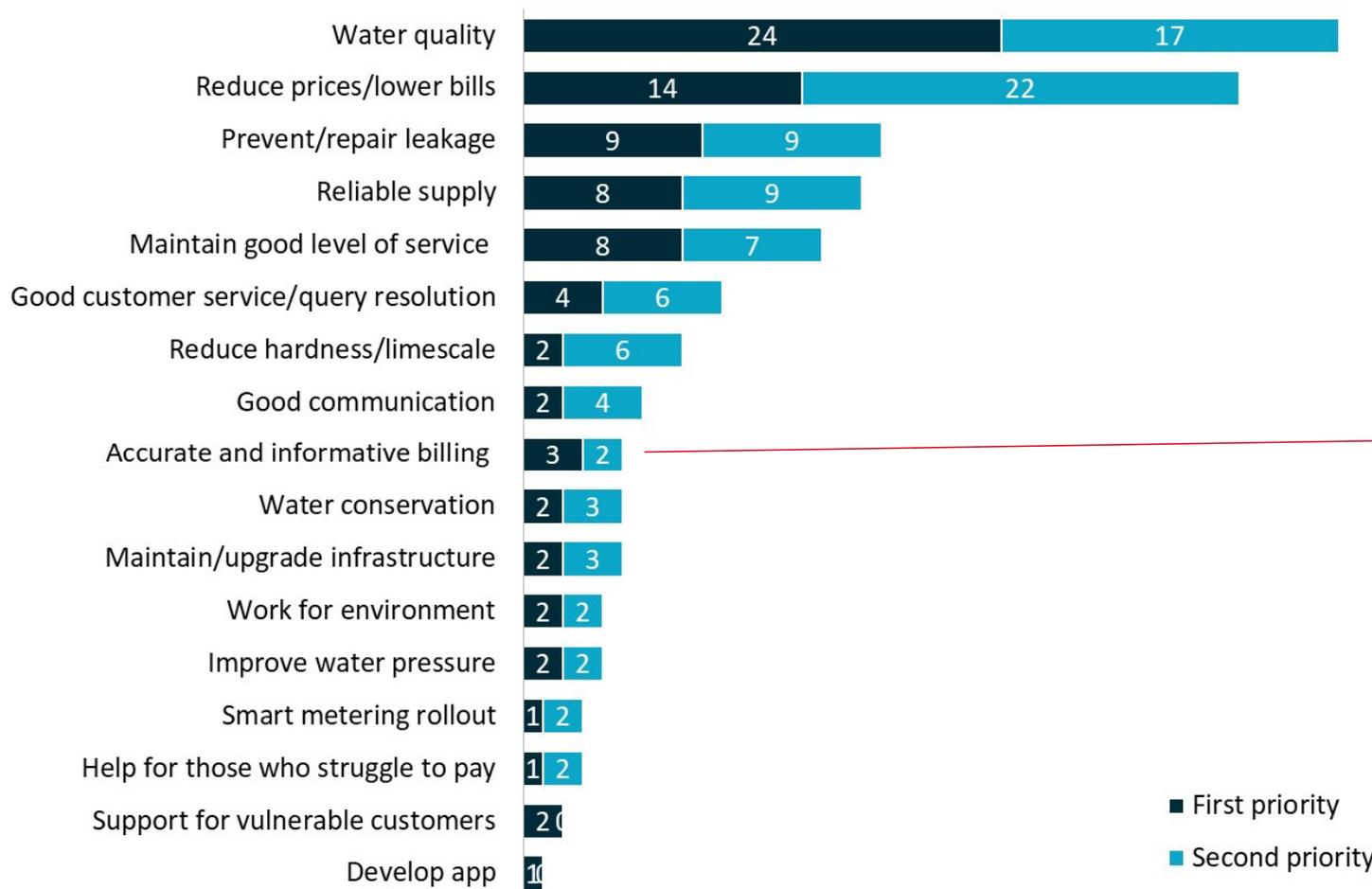
FUTURE

- App provision
- Roll out of smart metering

“ Move to a SMART meter system to see live data on water usage and charges ”

“ Great how you pay bills through the app. More services need to be available through the app or an online basis ”

ACCURATE AND INFORMATIVE BILLING NOT CORE FOCUS IN QUAL



DIFFERENCES

- No statistically significant differences between regions
- And no statistically significant differences between any customers types/segments

ACCURATE BILLING

- Only area mentioned that was not highlighted in the qualitative research

SPONTANEOUS PRIORITIES

- Those identified by participants in the quantitative work are similar to those from the uninformed pre-task in the 2020 qualitative research

■ First priority
■ Second priority

• Chart shows percentage of participants giving a response for either their first or second spontaneous priority

MEASURING PRIORITIES

METHODOLOGY

Priorities assessed through a MaxDiff approach. Participants are shown six sets of options. In each option set they were 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 21 different priority areas are assessed. 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 make sure your household receives water supplies that are high quality and always safe to drink

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 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

They work closely with primary, secondary schools and higher

Most important



TWO IDENTICAL EXERCISES

- Two exercises different only in that information about all the different areas was shown to participants between the two
- Hence, we have an uninformed and informed set of priorities
- Experimental design created of 6 choices per person per exercise, blocked into 24 sets
- Each initiative appeared at least once, and at most twice, in each set
- Econometric (logit) models were estimated on the choice data. Priority ranking were then derived directly from the rank order of the coefficients

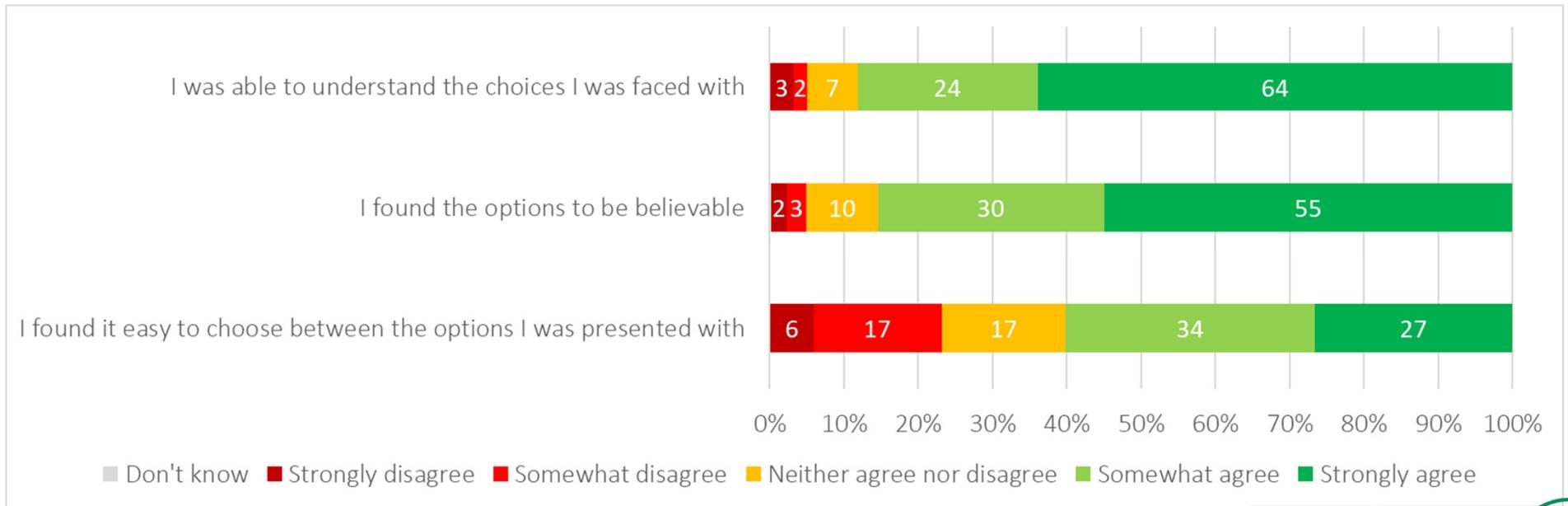
Q35. To help us understand your choices, please tell us why you selected #insert most important attribute selected at MaxDiff1# as the most important area for South Staffs Water/Cambridge Water to focus one?

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

MAXDIFF DIAGNOSTICS

PARTICIPANT UNDERSTANDING

Vast majority found the choices understandable and options believable



OPTIONS CHOICE

- A smaller proportion found it easy to choose between the options, principally because they often all seem important

“ There was very little to choose between the other options. All sounded laudable ”

“ It was important, just not as important as the other three options ”

“ Because they were all important. Mainly about conservation and the environment because they are important, but saving money is also important to me too being on a lower income ”

“ A majority of the options were important to the quality and supply of water, so it was difficult to decide which was the least important ”

QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM

HEADING	DESCRIPTION	UNINFORMED	INFORMED
 RELIABILITY	They make sure your household receives water supplies that are high quality and always safe to drink	1	1
 AFFORDABILITY	They keep the cost of water affordable for customers, today, tomorrow and long into the future	2	2
 LEAKAGE	They quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks	3	4
 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	4	3
 NOTIFICATION	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	5
 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 any pollution	6	6
 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	7	8
 BILL SUPPORT	They provide extra support for customers who are struggling to pay their bills – for example, discounted bills or payment breaks	8	7
 SUSTAINABILITY	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	9	9
 PRESSURE	The water always comes out the taps at a pressure that does not impact on your daily routine	10	11
 SERVICE SUPPORT	They provide extra support for customers who need more help accessing their services – for example, delivering bottled water if the water is cut off or braille bills	11	10

QUANTITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM (CONT.)

HEADING	DESCRIPTION	UNINFORMED	INFORMED
 RECYCLING	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	12	14
 QUICK RESOLUTION	They are easy to deal with by quickly and effectively resolving any queries you have about your water services	13	12
 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	14	13
 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	15	15
 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	16	16
 WAYS TO CONTACT	They provide a wide range of ways to contact and interact with them that meet all types of customers’ needs	17	18
 EDUCATION	They work closely with primary, secondary schools and higher education bodies to educate young people about the value of conserving and re-using water	18	17
 METER INSTALLS	They ensure that all customers who want a water meter are able to have one installed	19	19
 WEBSITE	They have a website that allows you to find the answer to any queries quickly and easily	20	20
 COMMUNITY	They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply	21	21

QUANITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - PRIORITY SCORES*

HEADING	DESCRIPTION	UNINFORMED	INFORMED
 RELIABILITY	They make sure your household receives water supplies that are high quality and always safe to drink	21.8	22.8
 AFFORDABILITY	They keep the cost of water affordable for customers, today, tomorrow and long into the future	10.6	9.8
 LEAKAGE	They quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks	10.4	9.4
 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	8.3	9.6
 NOTIFICATION	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	6.0	5.8
 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 any pollution	4.9	4.5
 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	4.2	4.1
 BILL SUPPORT	They provide extra support for customers who are struggling to pay their bills – for example, discounted bills or payment breaks	4.1	4.3
 SUSTAINABILITY	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	3.8	3.8
 PRESSURE	The water always comes out the taps at a pressure that does not impact on your daily routine	3.4	3.2
 SERVICE SUPPORT	They provide extra support for customers who need more help accessing their services – for example, delivering bottled water if the water is cut off or braille bills	3.3	3.5

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

QUANITATIVE RANKING OF INITIATIVES

TOP TO BOTTOM - PRIORITY SCORES* (CONT.)

HEADING	DESCRIPTION	UNINFORMED	INFORMED
 RECYCLING	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	2.9
 QUICK RESOLUTION	They are easy to deal with by quickly and effectively resolving any queries you have about your water services	3.1	3.0
 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	2.9
 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	2.1	2.4
 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	1.7	1.7
 WAYS TO CONTACT	They provide a wide range of ways to contact and interact with them that meet all types of customers’ needs	1.6	1.5
 EDUCATION	They work closely with primary, secondary schools and higher education bodies to educate young people about the value of conserving and re-using water	1.6	1.6
 METER INSTALLS	They ensure that all customers who want a water meter are able to have one installed	1.2	1.3
 WEBSITE	They have a website that allows you to find the answer to any queries quickly and easily	1.1	1.0
 COMMUNITY	They provide financial grants and/or sponsorship and their employees spend time volunteering to support local community schemes in the areas they supply	0.8	0.9

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

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN CUSTOMER DEMOGRAPHICS

SEGMENT	INITIATIVE	UNINFORMED		INFORMED	
		Rank	Difference	Rank	Difference
Region					
SSW	Water resources			8th	-3
CAM	Water resources			5th	3
Age					
18-35 yrs	Affordability			5th	-3
	Sustainability	6th	3	-	-
65 yrs +	Hardness			11th	-4
65 yrs +	Bill support			10th	-4
Social Grade					
AB	Water resources			5th	3
	Hardness	11th	-4	13th	-7
	Sustainability	6th	3		
C1C2	Hardness	6th	4	6th	4
DE	Water resources			10th	-4
	Bill support	6th	5		
	Service support	7th	5	7th	4
Gender					
Female	Bill support	7th	3		
	Pressure	14th	-7	14th	-8
Male	Bill support	10th	-3		
	Pressure	7th	7	6th	8

- 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;
 - 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 that emerged reflect what's been observed in other research – ie:
 - Water resources ranked higher by higher SEG groups and those in CAM
 - Bill 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					
Engaged Loyal Carers	Water resources	5th	3		
	Hardness	12th	-6	12th	-6
	Sustainability	7th	5	5th	7
Don't bother me	Water resources	12th	-7	12th	-6
	Hardness			4th	5
	Leakage			7th	-5
	Pressure	7th	6	5th	8
	Sustainability	18th	-11	18th	-11
Caring But Hard Pressed	Water resources	-	-	11th	-5
Savvy switcher	Leakage	-	-	7th	-5
Meter status					
Metered	Bill support			9th	-3
Unmetered	Bill support			6th	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;
 - 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%

STATISTICALLY SIGNIFICANT DIFFERENCES IN PRIORITIES BETWEEN SERVICE ISSUES & VULNERABILITY STATUS

SEGMENT	INITIATIVE	UNINFORMED		INFORMED	
		Rank	Difference	Rank	Difference
Service issue					
Limescale	Affordability	6th	-4		
	Notification			8th	-3
	Hardness	4th	4	4th	4
Loss of supply	Notification	8th	-3	8th	-3
	Bill support			10th	-4
Change of taste/small	Water resources	11th	-5	16th	-10
Discolouration	Discolouration	13th	-6	14th	-7
Low pressure	Hardness	11th	-4		
	Bill support			10th	-3
Query about meter	Hardness	14th	-7		
	Recycling	5th	8		
Query about bill	Incentives			6th	9
Vulnerability					
Vulnerable	Bill support	6th	5	6th	3
	Service support			7th	4
Non vulnerable	Bill support	11th	-5	9th	-3
	Service support			11th	-4

- 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;
 - 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%

NEW SPONTANEOUS PRIORITY (2017-PRESENT) & MISSING FROM CURRENT BUSINESS PLAN

Water hardness/limescale was highlighted as a greater issue now than in 2017. There is a primary customer need for clear water without filtering, limiting the impact on appliances and customer cost. Secondary issues related to water quality and customer experience

HOUSEHOLD & COMMUNITY IMPACT

- Cost of replacing/fixing appliances
- Frustrations with under performing showers
- Dry skin/hair

PERCEPTIONS OF WATER QUALITY

- Taste, appearance, smell lead to perceptions of lower water quality
- Customers feel like water is unsafe (or less safe) to drink

NEGATIVE CUSTOMER EXPERIENCE

- Adds cost to SSW/CAM dealing with customer complaints
- Leads to poor customer satisfaction (those who do not complain)

“ It’s a huge issue that affects everyone in the area, it’s the one of the things that bugs me most about Cambridgeshire ”

“ It clogs up my shower head and kettle ”

“ I want to feel confident that the water is safe to drink ”

“ It’s customer focus, efficient, and works at reducing complaints [sorting out hard water will lead to increased satisfaction/reduced complaints] ”

“ Improve the quality and reduce hardness of the water - the water is not pleasant to drink in hot drinks compared to Severn Trent water. All my taps and sinks are discoloured by limescale, and it is a problem when washing ”

“ Hard water causes a lot of damage because of the limescale build up, I have limescale build up around my taps that no cleaning product can remove ”

“ It is a measure of water quality ”

“ The quality of the water is utmost priority to prevent disease ”

“ This “feels like” the most immediate issue to address in terms of ensuring a good customer experience. For the customer I suspect this is the highest priority of the 4. ”

“ As we have hard water and I have to filter it before I can drink it as it causing me pain in my bladder if I don't ”

ATTITUDE TO BIG SOCIETY AND VULNERABLE CUSTOMERS

Support for vulnerable customers in 2017 appeared more industry driven and part of the informed vs spontaneous priorities; this time it came out in the spontaneous qualitative homework exercise (and to a much lesser degree in the uninformed spontaneous priorities in the quantitative work)

QUALITATIVE RESPONSE (2020)

- Mixed views here
- Little mention of 'society' in Future Letters
- BUT underlying shift towards 'being kind and looking out for each other' prompted by Covid-19
- Acknowledge that there is likely to be more people needing help post Covid-19
- Emerged as a 'Community' priority

That's gone up high in my list. I'm ashamed of myself that I didn't think of it. Pre-family, C2DE, Cambridge,

NEED HAS ALWAYS BEEN HERE

- It's a basic human need
- Personal experience
- Attitudes towards supporting those unable to afford their bills

“Water is essential for life and everyone should be able to afford it, especially those on very limited incomes. The cost of water has become prohibitive for many”

“As a single mother to two children, studying at university to become a mental health practitioner I found 70 pound a month unaffordable. My friend who is in a larger house with two adults and two children paid less than this a month. I don't understand why and nor did customer service”

FURTHER HEIGHTED BY CV-19

- Pandemic raised awareness of financial vulnerability across different customer types
- Shared responsibility in 'getting us all through this'

“People are struggling and it's not only people on benefits”

“During the pandemic there have been many family's who have struggled to pay their bills”

“Because Walsall and Brownhills like most places are affected by furloughing and redundancy. Bills are what keep people awake at night”

WATER RESOURCES

DRIVEN BY STRONG PERSONAL ENVIRONMENTAL OUTLOOK AND EXPERIENCE

Environmental conversation has got louder since 2017 priorities exercise BUT there is still a spectrum of attitudes

QUALITATIVE RESPONSE

- No climate deniers seen
- But not everyone was making the link between the environment and water shortages (climate neutral)
- More highly engaged customers seen who feel improving the planet is urgent and should be a priority for SSW/CAM

“ We need to take care of our environment, and this is becoming more critical with current climate change ”

“ Water is a precious commodity and every effort should be taken to protect it's source and not over use the supply ”

“ I have lived in Cambridge for 46 years and I have seen the demise of the rivers and water sources, I own a sheep farm and I have been intimately connected with the river system ”

“ Conservation of our environment would have the largest possible impact long term compared to the other options ”

“ A lot of water is lost in this way rather than by individual customer wastage and water is not a finite resource, as is seen by dried up rivers and reservoirs every summer, SSW need to plan long term ”

“ We have a responsibility to take care of the environment ”

LONG TERM COMMITMENT FROM SSC

- Not something that can be dealt with just in the short term
- Partnership between SSC and customers/communities

“ We need to improve environmental management to safeguard our future ”

“ Protecting our natural resources is paramount to protecting our future ”

INCREASINGLY IMPORTANT FOR ALL COMPANIES TO MITIGATE THEIR IMPACT ON THE ENVIRONMENT

As with water resources response driven by strong personal engagement in environmental/climate change issues

LONG TERM COMMITMENT FROM SSC

- Focus is on both the specifics (plastics, landfill, etc) and wider environmental impacts
- Concern for the immediate impact but also doing what's necessary for future generations

“ I feel that reducing emissions and waste is really important in the current climate and believe that most companies are doing their bit now to support this ”

“ All companies need to do this going forward ”

“ Environmental impacts due to human activity are proving to be detrimental on a global level. I think any effort to reduce pollution and carbon emissions is of the utmost importance for all organisations ”

“ Plastic is a huge world concern, and will help the environment as a whole ”

“ Companies need to demonstrate a greater commitment to combating climate change ”

“ Every company should now be prioritising sustainability ”

“ This is the most important issue facing us today and every person, company and government need to be focussed on it ”

“ Too help save the planet for the next generation ”

“ Because we need to look after the planet while we still have it ”

LEAKAGE

REASONS FOR REDUCING LEAKAGE FALLS INTO FOUR KEY AREAS

Prioritising leakage is often multilayered and interlinked – reducing leakage reduces waste, saves costs in the longer terms, ensures reliability of supply and benefits the environment

“ National water wastage is a major problem throughout the UK and should be addressed urgently given the future problems we may have with climate change. Money should also be spent on establishing a National Water Resource to move water around the UK as and when needed ”

“ Upgrading water pipes will in the long term reduce water waste and, over all costs of managing the water system. Replacing the pipes with more modern materials, could improve the quality of the water delivered so people choose tap water over bottled water and reduce single use plastics ”

“ It is very important to stop leaks and keep pipe work in good order so we don't waste water ”

“ All the efforts that customers make to reduce their consumption is lost many times over by leaks to mains supply which last for days before being repaired. ”

“ It's important for environment and economy to prevent waste and to repair damage ”

“ It is their most wasteful area, improving this will give the company and customers the best deal ”

“ Because it's important that they ...quickly repair and replace their network of pipes as needed to reduce the amount of water lost each day through leaks. ”

“ If the amount of water wasted is minimised this reduces the amount of water needed to be taken from the rivers and other sources which would be better for the environment ”

METERING READING AND INSTALLS

Very few chose these options as their first choice in the first exercise. Of those who did reasons fall into two categories = saving money and reducing wastage both of which give customers greater control

METER READING

“ So people can monitor what they use & see where they can reduce their cost ”

“ Helps to sort out your finances ”

“ This will help us to be more aware of water wastage ”

“ Information for the customer is important for them to monitor their use of water ”

“ Help people to track water usage/bills and adjust to be better ”

“ I am a single occupier. I don't use much water, you increased my payments a year ago and haven't read my meter since. ”

“ So people can monitor what they use & see where they can reduce their cost ”

METER INSTALLS

“ If these meters help people reduce the amount of water that they use then this would initially be a good investment ”

“ I think everyone should have equal rights ”

“ To save money ”

INITIATIVE RANKING

QUALITATIVE INSIGHTS COMPARED TO QUANTITATIVE RESPONSES

UNINFORMED INFORMED

UNINFORMED INFORMED

	UNINFORMED	INFORMED
 RELIABILITY	1	1
 AFFORDABILITY	2	2
 LEAKAGE	3	4
 PLANNING	4	3
 NOTIFICATION	5	5
 WATER RESOURCES	6	6
 HARDNESS	7	8
 BILL SUPPORT	8	7
 SUSTAINABILITY	9	9
 PRESSURE	10	11
 SERVICE SUPPORT (VULNERABLE PSR)	11	10

Future
Enhancing Plus

Above &
beyond

Enhancing

Hygiene

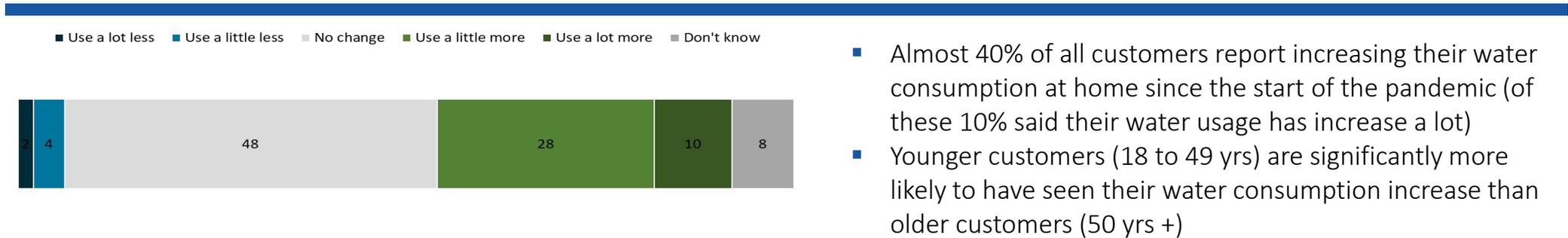
	UNINFORMED	INFORMED
 RECYCLING	12	14
 QUICK RESOLUTION	13	12
 LOCAL ENVIRONMENT	14	13
 INCENTIVES (WATER REDUCTION)	15	15
 METER READINGS	16	16
 WAYS TO CONTACT	17	18
 EDUCATION	18	17
 METER INSTALLS	19	19
 WEBSITE	20	20
 COMMUNITY (GRANTS/ VOLUNTEERING)	21	21

IMPACT OF COVID-19



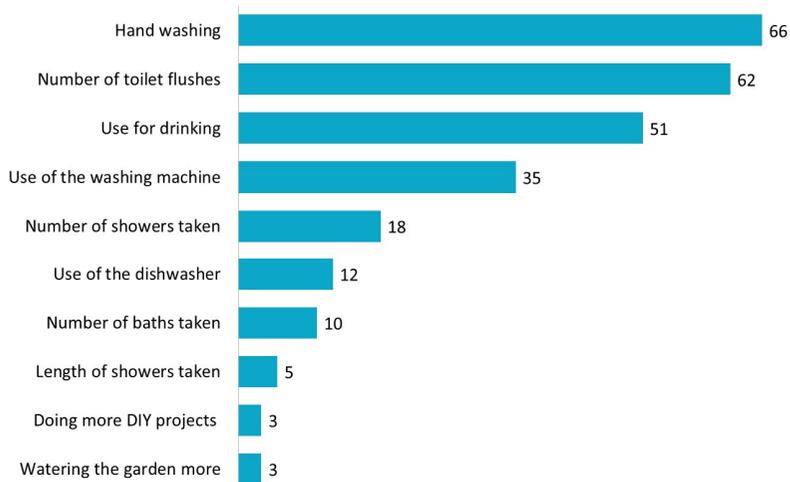
CHANGES IN WATER CONSUMPTION AT HOME SINCE THE START OF THE PANDEMIC

A significant proportion of customers have seen their water consumption at home increase since the start of the pandemic



- Almost 40% of all customers report increasing their water consumption at home since the start of the pandemic (of these 10% said their water usage has increase a lot)
- Younger customers (18 to 49 yrs) are significantly more likely to have seen their water consumption increase than older customers (50 yrs +)

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



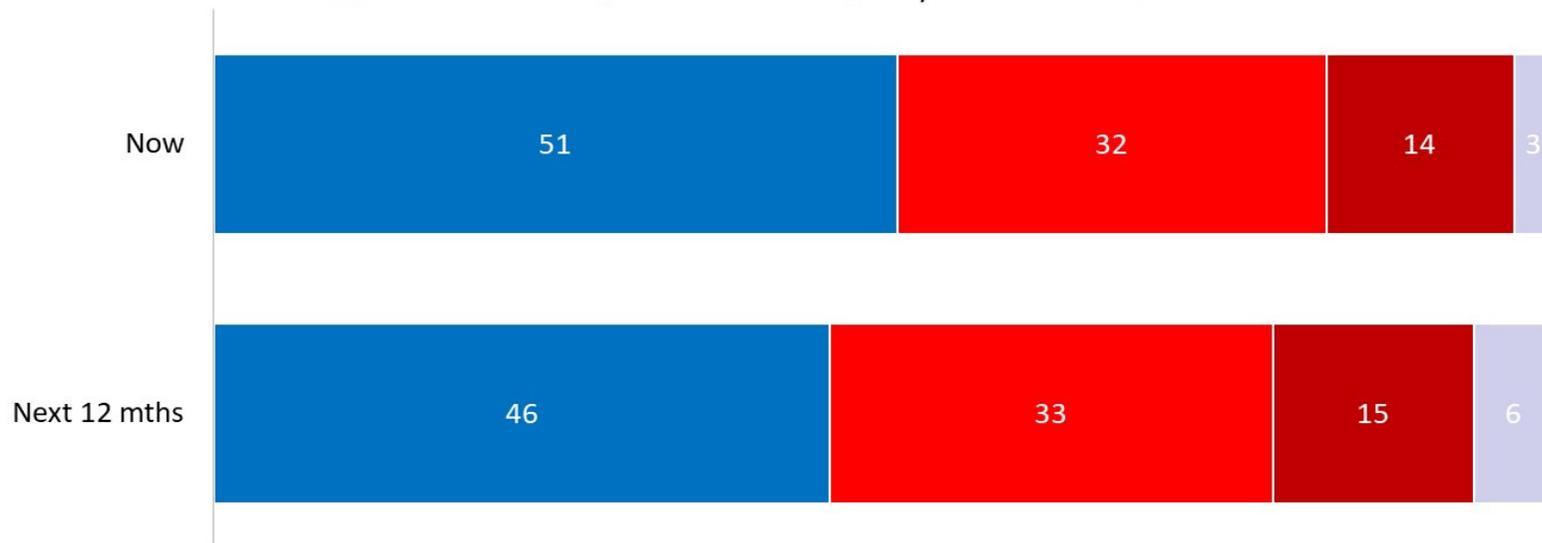
- Reasons for increases in water usage are consistent across the different customer types
- There are no significant differences

FINANCIAL CONCERN AS A RESULT OF THE PANDEMIC

Around half of customers have some concern or are very concerned about their ability to pay household bills now and over the next 12 mths

CONCERNS ABOUT HOUSEHOLD BILLS

■ Not concerned ■ Some concern ■ Very concerned ■ Unsure

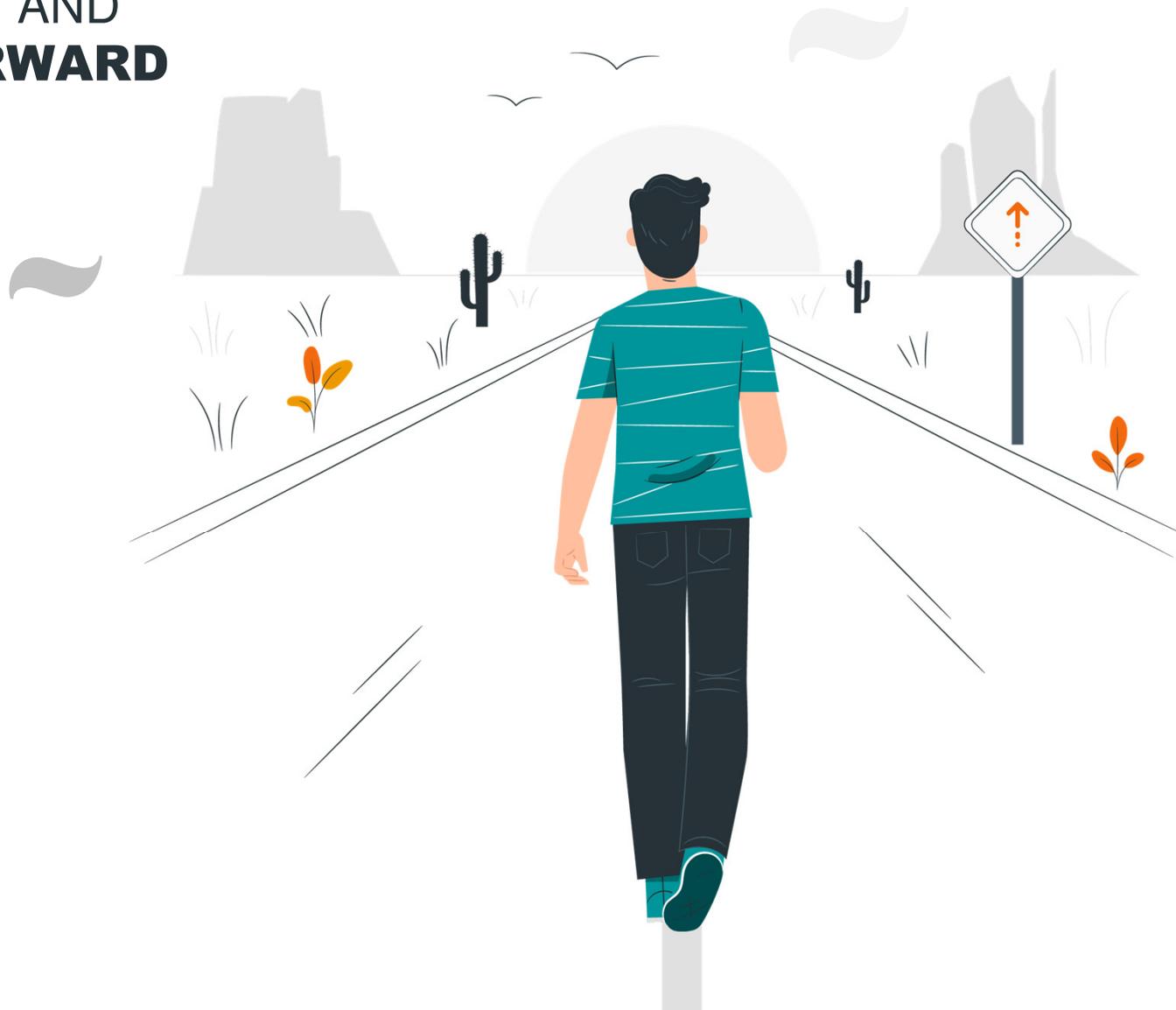


Significant differences:

- Not concerned about ability to pay household bills **now**: 65+, male, ABC1 social grades
- Some concern about ability to pay household bills **now**:– 18-34 yrs, female, DE social grades
- Not concerned about ability to pay household bills **in next 12 mths**:– 65+, male, ABC1 social grades
- Some concern about ability to pay household bills **in next 12 mths**: 18-34 yrs, female, DE social grades

- SSC tracker responses = 79% confident of paying next bill (gives short term view cf longer term view above)
- Concern about ability to pay bills is higher than those seen in similar work in the Sth East carried out October/November 2020

SUMMARY AND **WAY FORWARD**



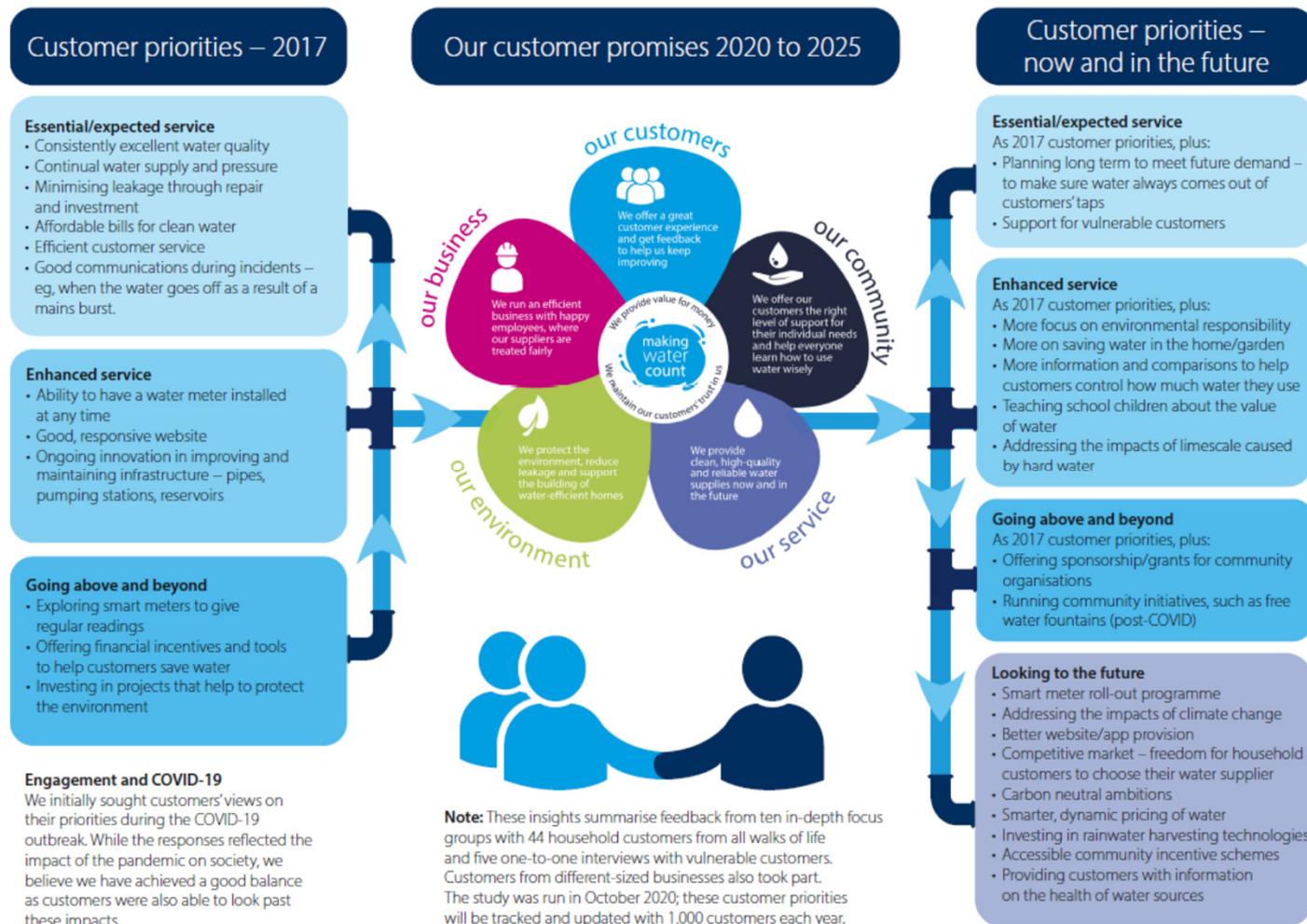
SUMMARY

- ✓ Priorities have remained consistent between the qualitative and quantitative research
- ✓ Reliable high quality water supply, affordability, leakage and long term planning are the top 4 priorities mentioned spontaneously and through the prioritisation exercises (uninformed and informed)
- ✓ This reflects the core hygiene priorities identified during the 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
- ✓ 40% of customers report an increase in home water consumption as a result of being at home more due to the CV-19 pandemic
- ✓ Around half of customers have some concern about their ability to pay their household bills – now and over the next 12 months



GOOD READ ACROSS

QUALITATIVE INSIGHTS COMPARED TO QUANTITATIVE RESPONSES



Evolution of priorities:

- Sustainability and recycling could be considered as part of the core priorities rather than “looking to the future”. Overall they were:
 - 9th/12th uninformed
 - 9th/14th informed
- Some areas identified as “enhancing” in the qualitative research were ranked lower than “above & beyond” in the quantitative research:
 - Local environment
 - Incentives for reducing water consumption
- Billing (accuracy and information included) was not identified as a priority in qualitative research but was identified as a spontaneous priority by 5% of quantitative participants

LITERATURE REVIEW

FOUR CORE RECOMMENDATIONS

1

Approach adopted in the qualitative and quantitative methods for Yr1. Will continue to use in quantitative research in Yr2



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

On-going within SSC. Awaiting for Ofwat & CCWater's guidance



CONSIDERATIONS & RECOMMENDATIONS

- ✓ Billing was spontaneously identified as a priority area – should this be included in 2021/22?
 - ✓ Add or replace?
 - ✓ Adding – would need to move away from Logit modelling and use less accurate alternative
 - ✓ Replacing – which priority area should be removed (meter installs/website/community)?
- ✓ Is there potential to remove Q22 (reason for selecting “least liked” in first choice)? This isn’t yielding a great deal of meaningful information
- ✓ Review C-Sat and Priority questionnaires for consistency. Decision required on whether to change C-Sat attributes to mirror those in the MaxDiff exercises:
 - ✓ If so – will lose ability to continue to measure existing C-Sat measures into the focus
 - ✓ If not – will not be able to map satisfaction performance against priority areas
- ✓ Sampling – is there a need to set quotas on future customers and/or ethnicity?
- ✓ Conduct further analysis of verbatim areas to help shape further communications (ie: metering)
- ✓ Analysis in Yr 2 to include transactional segments and an understanding of those who significantly shift views between uninformed and informed priorities



NEXT STEPS



APPENDIX A SEGMENTATION ANALYSIS



SEGMENTATION ANALYSIS

METHODOLOGY

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

- Gender
- Age
- Social grade (SEG)
- Region
- Meter Status
- SSC attitudinal/behavioural segmentation

SSC transactional segmentation will be used for analysis in Yr2 once back population has been completed

Separate models were estimated for each segment and the corresponding ranking were derived: '1' indicated the highest rank (ie: the most important initiative) and '21' the lowest rank (ie: the least important initiative)

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
- At least one initiative is in the top third of the ranking (1st to 7th rank)
- The difference between priority scores is statistically significant at the 10% level

SEGMENTATION ANALYSIS

SERVICE ISSUE DESCRIPTIONS

Service issue label for segmentation tables	Service issue description used in the questionnaire
Query about bill	Had to raise a query about your water bill
Query about water meter	Had to raise a query about a water meter or installing a meter
Customer service complaint ⁽¹⁾	Needed to raise a customer service complaint
Discolouration	Discolouration of water coming out of your tap
Change to taste or smell	A change to the taste and/or smell of your tap water
Limescale in water	A problem relating to limescale in the water - such as a failure of an appliance, or stained taps/showerheads
Loss of water supply	A temporary loss of water supply - for more than one hour
Leak in a supply pipe ⁽¹⁾	A leak in the underground pipe that supplies water to your property from the mains pipe
Low water pressure	Low water pressure
Flooding from a burst pipe ⁽¹⁾	Flooding from a burst pipe
Hose pipe ban ⁽¹⁾	A hose pipe ban
Traffic disruption	Traffic disruption caused by water works

(1) Not included in subsequent tables due to small base (n < 30)

SEGMENTATION ANALYSIS

RELIABILITY

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	1st	0	1st	0
Query about bill	52	1st	0	1st	0
Query about water meter	33	1st	0	1st	0
Discolouration	46	1st	0	1st	0
Change to taste or smell	38	1st	0	1st	0
Limescale in water	88	1st	0	1st	0
Loss of water supply	50	1st	0	1st	0
Low water pressure	77	1st	0	1st	0
Traffic disruption	62	1st	0	1st	0

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	1st		1st	
Male	234	1st	0	1st	0
Female	272	1st	0	1st	0
Age 18-34	108	1st	0	1st	0
Age 35-64	282	1st	0	1st	0
Age 65+	120	1st	0	1st	0
SEG AB	151	1st	0	1st	0
SEG C1C2	251	1st	0	1st	0
SEG DE	104	1st	0	1st	0
South Staffs Water	364	1st	0	1st	0
Cambridge Water	147	1st	0	1st	0
Meter: Yes	293	1st	0	1st	0
Meter: No	196	1st	0	1st	0
Caring But Time Pressed	110	1st	0	1st	0
Engaged Loyal Carers	188	1st	0	1st	0
Don't Bother Me	98	2nd	-1	1st	0
Savvy Switchers	45	1st	0	1st	0
Connected But Hard Pressed	70	1st	0	1st	0
Vulnerable: Yes	177	1st	0	1st	0
Vulnerable: No	334	1st	0	1st	0

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

AFFORDABILITY

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	3rd	-1	4th	-2
Query about bill	52	5th	-3	3rd	0
Query about water meter	33	4th	-2	5th	-3
Discolouration	46	4th	-2	4th	-2
Change to taste or smell	38	4th	-2	3rd	0
Limescale in water	88	6th	↓ -4	5th	-3
Loss of water supply	50	3rd	-1	3rd	0
Low water pressure	77	2nd	+1	2nd	+1
Traffic disruption	62	4th	-2	6th	-4

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	2nd		2nd	
Male	234	2nd	0	4th	-2
Female	272	2nd	0	2nd	+2
Age 18-34	108	2nd	0	5th	↓ -3
Age 35-64	282	3rd	-1	2nd	+2
Age 65+	120	3rd	-1	4th	-2
SEG AB	151	2nd	+1	4th	-2
SEG C1C2	251	2nd	+1	3rd	-1
SEG DE	104	3rd	-1	2nd	+1
South Staffs Water	364	2nd	+1	2nd	+2
Cambridge Water	147	3rd	-1	4th	-2
Meter: Yes	293	4th	-2	4th	-1
Meter: No	196	2nd	+2	3rd	+1
Caring But Time Pressed	110	2nd	+1	3rd	-1
Engaged Loyal Carers	188	4th	-2	4th	-2
Don't Bother Me	98	1st	+2	2nd	+2
Savvy Switchers	45	3rd	-1	7th	↓ -5
Connected But Hard Pressed	70	3rd	-1	2nd	+1
Vulnerable: Yes	177	3rd	-1	2nd	+2
Vulnerable: No	334	2nd	+1	4th	-2

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

LEAKAGE

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	2nd	+1	2nd	+2
Query about bill	52	2nd	+1	2nd	+2
Query about water meter	33	2nd	+1	2nd	+2
Discolouration	46	3rd	0	2nd	+2
Change to taste or smell	38	2nd	+1	2nd	+2
Limescale in water	88	3rd	0	3rd	0
Loss of water supply	50	2nd	+1	2nd	+2
Low water pressure	77	3rd	-1	3rd	+1
Traffic disruption	62	2nd	+1	2nd	+2

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	3rd		4th	
Male	234	3rd	0	2nd	+2
Female	272	3rd	0	4th	-2
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Age 35-64	282	2nd	+2	3rd	0
Age 65+	120	4th	-1	3rd	0
SEG AB	151	3rd	-1	3rd	+1
SEG C1C2	251	3rd	-1	4th	-1
SEG DE	104	2nd	+1	3rd	+1
South Staffs Water	364	3rd	-1	4th	-2
Cambridge Water	147	2nd	+1	2nd	+2
Meter: Yes	293	2nd	+1	2nd	+2
Meter: No	196	3rd	-1	4th	-2
Caring But Time Pressed	110	3rd	-1	4th	0
Engaged Loyal Carers	188	2nd	+1	3rd	0
Don't Bother Me	98	3rd	-1	7th	-5
Savvy Switchers	45	2nd	+1	2nd	+2
Connected But Hard Pressed	70	2nd	+1	3rd	+1
Vulnerable: Yes	177	2nd	+1	3rd	0
Vulnerable: No	334	3rd	-1	3rd	0

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS 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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	4th	0	3rd	0
Query about bill	52	3rd	+1	4th	-2
Query about water meter	33	3rd	+1	3rd	0
Discolouration	46	2nd	+2	3rd	0
Change to taste or smell	38	3rd	+1	4th	-2
Limescale in water	88	2nd	+2	2nd	+2
Loss of water supply	50	4th	0	4th	-2
Low water pressure	77	4th	0	4th	-2
Traffic disruption	62	3rd	+1	4th	-1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	4th		3rd	
Male	234	4th	0	3rd	0
Female	272	4th	0	3rd	0
Age 18-34	108	4th	0	2nd	+2
Age 35-64	282	4th	-1	4th	-2
Age 65+	120	2nd	+2	2nd	+2
SEG AB	151	4th	0	2nd	+1
SEG C1C2	251	4th	0	2nd	+2
SEG DE	104	4th	0	4th	-2
South Staffs Water	364	4th	0	3rd	0
Cambridge Water	147	4th	0	3rd	0
Meter: Yes	293	3rd	+1	3rd	-1
Meter: No	196	4th	-1	2nd	+1
Caring But Time Pressed	110	4th	0	2nd	+1
Engaged Loyal Carers	188	3rd	+1	2nd	+2
Don't Bother Me	98	5th	-1	3rd	0
Savvy Switchers	45	5th	-1	5th	-2
Connected But Hard Pressed	70	4th	0	4th	-2
Vulnerable: Yes	177	4th	0	4th	-2
Vulnerable: No	334	4th	0	2nd	+2

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

NOTIFICATION

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	5th	0	5th	0
Query about bill	52	4th	+1	7th	-2
Query about water meter	33	7th	-2	4th	+1
Discolouration	46	5th	0	6th	-1
Change to taste or smell	38	5th	0	6th	-1
Limescale in water	88	7th	-2	8th	↓ -3
Loss of water supply	50	8th	↓ -3	8th	↓ -3
Low water pressure	77	5th	0	5th	0
Traffic disruption	62	5th	0	3rd	+2

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
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Male	234	5th	0	5th	0
Female	272	5th	0	5th	0
Age 18-34	108	5th	0	4th	+1
Age 35-64	282	5th	0	5th	0
Age 65+	120	5th	0	5th	0
SEG AB	151	7th	-2	6th	-1
SEG C1C2	251	5th	0	5th	0
SEG DE	104	5th	0	5th	0
South Staffs Water	364	5th	+1	5th	+1
Cambridge Water	147	6th	-1	6th	-1
Meter: Yes	293	5th	0	5th	0
Meter: No	196	5th	0	5th	0
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Engaged Loyal Carers	188	6th	-1	7th	-2
Don't Bother Me	98	4th	+2	6th	-1
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Vulnerable: Yes	177	5th	0	5th	0
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Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

WATER RESOURCES

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	6th	0	6th	+1
Query about bill	52	6th	0	8th	-2
Query about water meter	33	8th	-2	7th	-1
Discolouration	46	7th	-1	9th	-3
Change to taste or smell	38	11th	↓ -5	16th	↓ -10
Limescale in water	88	5th	+1	6th	0
Loss of water supply	50	6th	0	6th	+1
Low water pressure	77	6th	0	7th	-1
Traffic disruption	62	6th	0	5th	+1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	6th		6th	
Male	234	6th	0	7th	-1
Female	272	6th	0	6th	+1
Age 18-34	108	7th	-1	9th	-3
Age 35-64	282	6th	0	6th	0
Age 65+	120	6th	0	6th	+2
SEG AB	151	5th	+1	5th	↑ +3
SEG C1C2	251	7th	-1	7th	0
SEG DE	104	9th	-3	10th	↓ -4
South Staffs Water	364	6th	-1	8th	↓ -3
Cambridge Water	147	5th	+1	5th	↑ +3
Meter: Yes	293	6th	0	6th	+2
Meter: No	196	6th	0	8th	-2
Caring But Time Pressed	110	7th	-1	8th	-2
Engaged Loyal Carers	188	5th	↑ +3	6th	+2
Don't Bother Me	98	12th	↓ -7	12th	↓ -6
Savvy Switchers	45	4th	+2	4th	+2
Connected But Hard Pressed	70	8th	-2	11th	↓ -5
Vulnerable: Yes	177	7th	-1	9th	-3
Vulnerable: No	334	6th	+1	6th	+3

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	7th	+1	7th	+1
Query about bill	52	7th	0	10th	-2
Query about water meter	33	14th	↓ -7	16th	-8
Discolouration	46	6th	+2	10th	-2
Change to taste or smell	38	6th	+2	7th	+1
Limescale in water	88	4th	↑ +4	4th	↑ +4
Loss of water supply	50	7th	0	7th	+1
Low water pressure	77	11th	↓ -4	8th	0
Traffic disruption	62	9th	-2	9th	-1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	7th		8th	
Male	234	8th	0	8th	0
Female	272	8th	0	8th	0
Age 18-34	108	8th	0	7th	+1
Age 35-64	282	8th	-1	8th	0
Age 65+	120	7th	0	11th	↓ -4
SEG AB	151	11th	↓ -4	13th	↓ -7
SEG C1C2	251	6th	↑ +4	6th	↑ +4
SEG DE	104	10th	-3	9th	-2
South Staffs Water	364	7th	+3	7th	+3
Cambridge Water	147	10th	-3	10th	-3
Meter: Yes	293	7th	+1	7th	0
Meter: No	196	8th	-1	7th	0
Caring But Time Pressed	110	6th	+2	6th	+3
Engaged Loyal Carers	188	12th	↓ -6	12th	↓ -6
Don't Bother Me	98	6th	+3	4th	↑ +5
Savvy Switchers	45	9th	-2	14th	-6
Connected But Hard Pressed	70	7th	0	7th	+1
Vulnerable: Yes	177	9th	-2	8th	0
Vulnerable: No	334	7th	+2	8th	0

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

BILL SUPPORT

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	8th	-1	8th	-2
Query about bill	52	8th	0	11th	-4
Query about water meter	33	9th	-1	9th	-2
Discolouration	46	13th	↓ -6	14th	↓ -7
Change to taste or smell	38	12th	-5	12th	-5
Limescale in water	88	10th	-3	9th	-2
Loss of water supply	50	10th	-2	10th	↓ -4
Low water pressure	77	9th	-1	10th	↓ -3
Traffic disruption	62	10th	-2	7th	0

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	8th		7th	
Male	234	10th	↓ -3	9th	-2
Female	272	7th	↑ +3	7th	+2
Age 18-34	108	10th	-3	6th	+1
Age 35-64	282	7th	+1	7th	0
Age 65+	120	8th	+1	10th	↓ -4
SEG AB	151	9th	-1	8th	-1
SEG C1C2	251	10th	-3	9th	-3
SEG DE	104	6th	↑ +5	6th	↑ +3
South Staffs Water	364	8th	+3	6th	+3
Cambridge Water	147	11th	-3	9th	-3
Meter: Yes	293	8th	-1	9th	↓ -3
Meter: No	196	7th	+1	6th	↑ +3
Caring But Time Pressed	110	9th	-2	7th	0
Engaged Loyal Carers	188	8th	-1	9th	-2
Don't Bother Me	98	11th	-3	8th	0
Savvy Switchers	45	12th	-4	10th	-3
Connected But Hard Pressed	70	5th	+3	9th	-2
Vulnerable: Yes	177	6th	↑ +5	6th	↑ +3
Vulnerable: No	334	11th	↓ -5	9th	↓ -3

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

SUSTAINABILITY

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	9th	0	9th	+1
Query about bill	52	12th	-3	5th	+4
Query about water meter	33	6th	+3	8th	+1
Discolouration	46	12th	-3	7th	+2
Change to taste or smell	38	16th	-7	17th	-8
Limescale in water	88	8th	+1	7th	+3
Loss of water supply	50	5th	+4	5th	+5
Low water pressure	77	7th	+2	12th	-3
Traffic disruption	62	7th	+2	8th	+2

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	9th		9th	
Male	234	9th	0	10th	-1
Female	272	9th	0	9th	+1
Age 18-34	108	6th	↑ +3	8th	+1
Age 35-64	282	9th	0	9th	0
Age 65+	120	11th	-3	8th	+1
SEG AB	151	6th	↑ +4	7th	+3
SEG C1C2	251	9th	-1	8th	+1
SEG DE	104	11th	-3	12th	-4
South Staffs Water	364	9th	-2	9th	-1
Cambridge Water	147	7th	+2	8th	+1
Meter: Yes	293	9th	0	8th	+2
Meter: No	196	9th	0	10th	-2
Caring But Time Pressed	110	8th	+1	12th	-4
Engaged Loyal Carers	188	7th	↑ +5	5th	↑ +7
Don't Bother Me	98	18th	↓ -11	18th	↓ -11
Savvy Switchers	45	8th	+1	6th	+3
Connected But Hard Pressed	70	10th	-1	8th	+1
Vulnerable: Yes	177	12th	-4	11th	-4
Vulnerable: No	334	8th	+4	7th	+4

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

PRESSURE

The water always comes out the taps at a pressure that does not impact on your daily routine

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	11th	0	10th	+2
Query about bill	52	11th	-1	16th	-5
Query about water meter	33	13th	-3	13th	-2
Discolouration	46	8th	+3	8th	+3
Change to taste or smell	38	8th	+3	5th	+6
Limescale in water	88	11th	0	10th	+1
Loss of water supply	50	11th	-1	12th	-1
Low water pressure	77	10th	0	6th	+6
Traffic disruption	62	11th	0	11th	0

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	10th		11th	
Male	234	7th	↑ +7	6th	↑ +8
Female	272	14th	↓ -7	14th	↓ -8
Age 18-34	108	11th	0	14th	-3
Age 35-64	282	12th	-2	11th	+1
Age 65+	120	9th	+3	9th	+2
SEG AB	151	10th	+2	11th	0
SEG C1C2	251	8th	+4	10th	+3
SEG DE	104	12th	-2	11th	-1
South Staffs Water	364	11th	-2	12th	-5
Cambridge Water	147	9th	+2	7th	+5
Meter: Yes	293	10th	+2	12th	-1
Meter: No	196	12th	-2	11th	+1
Caring But Time Pressed	110	10th	+1	9th	+2
Engaged Loyal Carers	188	13th	-4	13th	-4
Don't Bother Me	98	7th	↑ +6	5th	↑ +8
Savvy Switchers	45	13th	-2	17th	-6
Connected But Hard Pressed	70	11th	-1	12th	-2
Vulnerable: Yes	177	11th	-1	15th	-5
Vulnerable: No	334	10th	+1	10th	+5

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

SERVICE SUPPORT

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	12th	-2	11th	-2
Query about bill	52	13th	-2	13th	-3
Query about water meter	33	11th	0	14th	-4
Discolouration	46	11th	-1	12th	-2
Change to taste or smell	38	13th	-3	9th	+1
Limescale in water	88	12th	-2	12th	-3
Loss of water supply	50	12th	-1	11th	-2
Low water pressure	77	8th	+3	11th	-1
Traffic disruption	62	16th	-6	15th	-6

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	11th		10th	
Male	234	12th	-2	12th	-2
Female	272	10th	+2	10th	+2
Age 18-34	108	12th	-2	12th	-2
Age 35-64	282	10th	+1	10th	0
Age 65+	120	12th	-1	7th	+3
SEG AB	151	12th	-3	12th	-3
SEG C1C2	251	13th	-4	11th	-3
SEG DE	104	7th	↑ +5	7th	↑ +4
South Staffs Water	364	10th	+3	10th	+1
Cambridge Water	147	13th	-3	11th	-1
Meter: Yes	293	12th	-2	10th	-1
Meter: No	196	10th	+2	9th	+1
Caring But Time Pressed	110	12th	-2	10th	0
Engaged Loyal Carers	188	11th	0	11th	-1
Don't Bother Me	98	10th	+1	11th	-1
Savvy Switchers	45	16th	-6	12th	-2
Connected But Hard Pressed	70	9th	+2	6th	+5
Vulnerable: Yes	177	8th	+4	7th	↑ +4
Vulnerable: No	334	12th	-4	11th	↓ -4

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

RECYCLING

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	10th	+4	13th	0
Query about bill	52	9th	+3	14th	-2
Query about water meter	33	5th	↑ +8	6th	+8
Discolouration	46	14th	-2	15th	-1
Change to taste or smell	38	10th	+2	10th	+4
Limescale in water	88	9th	+4	13th	0
Loss of water supply	50	9th	+4	9th	+5
Low water pressure	77	12th	0	15th	-2
Traffic disruption	62	8th	+5	10th	+4

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	12th		14th	
Male	234	13th	-2	15th	-4
Female	272	11th	+2	11th	+4
Age 18-34	108	13th	-1	13th	0
Age 35-64	282	13th	-1	14th	0
Age 65+	120	10th	+3	12th	+2
SEG AB	151	8th	+5	10th	+3
SEG C1C2	251	11th	+2	13th	+1
SEG DE	104	15th	-6	14th	-2
South Staffs Water	364	13th	-5	14th	-2
Cambridge Water	147	8th	+5	12th	+2
Meter: Yes	293	11th	+3	11th	+3
Meter: No	196	14th	-3	14th	-3
Caring But Time Pressed	110	13th	-1	11th	+3
Engaged Loyal Carers	188	9th	+4	10th	+3
Don't Bother Me	98	17th	-7	15th	-3
Savvy Switchers	45	7th	+6	9th	+4
Connected But Hard Pressed	70	13th	-1	15th	-3
Vulnerable: Yes	177	14th	-5	12th	+1
Vulnerable: No	334	9th	+5	13th	-1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

QUICK RESOLUTION

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	13th	-1	15th	-4
Query about bill	52	14th	-1	9th	+5
Query about water meter	33	15th	-3	11th	+1
Discolouration	46	10th	+3	16th	-4
Change to taste or smell	38	7th	+6	11th	+1
Limescale in water	88	13th	-1	14th	-2
Loss of water supply	50	13th	-1	15th	-3
Low water pressure	77	13th	0	13th	-2
Traffic disruption	62	12th	0	13th	-1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	13th		12th	
Male	234	11th	+1	11th	+2
Female	272	12th	-1	13th	-2
Age 18-34	108	9th	+4	11th	+1
Age 35-64	282	11th	+2	13th	-2
Age 65+	120	14th	-4	13th	-1
SEG AB	151	14th	-3	14th	-2
SEG C1C2	251	12th	-1	12th	-1
SEG DE	104	8th	+6	8th	+6
South Staffs Water	364	12th	+2	11th	+3
Cambridge Water	147	14th	-2	14th	-3
Meter: Yes	293	13th	-2	13th	0
Meter: No	196	11th	+2	13th	0
Caring But Time Pressed	110	11th	+2	13th	-1
Engaged Loyal Carers	188	15th	-5	14th	-3
Don't Bother Me	98	8th	+6	10th	+4
Savvy Switchers	45	10th	+2	11th	+1
Connected But Hard Pressed	70	12th	+1	10th	+4
Vulnerable: Yes	177	10th	+4	10th	+4
Vulnerable: No	334	14th	-4	14th	-4

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	14th	-1	12th	+2
Query about bill	52	18th	-4	12th	+1
Query about water meter	33	10th	+4	10th	+3
Discolouration	46	9th	+5	13th	0
Change to taste or smell	38	17th	-3	13th	0
Limescale in water	88	14th	0	11th	+3
Loss of water supply	50	14th	0	14th	-1
Low water pressure	77	14th	0	9th	+5
Traffic disruption	62	13th	+1	12th	+1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	14th		13th	
Male	234	14th	-1	13th	-1
Female	272	13th	+1	12th	+1
Age 18-34	108	14th	0	10th	+4
Age 35-64	282	14th	0	15th	-2
Age 65+	120	13th	+1	14th	-1
SEG AB	151	13th	+1	9th	+5
SEG C1C2	251	14th	0	14th	-2
SEG DE	104	13th	0	13th	0
South Staffs Water	364	14th	-2	13th	0
Cambridge Water	147	12th	+2	13th	0
Meter: Yes	293	14th	-1	14th	-2
Meter: No	196	13th	+1	12th	+2
Caring But Time Pressed	110	14th	0	14th	-1
Engaged Loyal Carers	188	10th	+5	8th	+7
Don't Bother Me	98	19th	-7	17th	-6
Savvy Switchers	45	11th	+3	8th	+6
Connected But Hard Pressed	70	16th	-2	13th	0
Vulnerable: Yes	177	13th	0	13th	-1
Vulnerable: No	334	13th	0	12th	+1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	15th	0	14th	+1
Query about bill	52	10th	+5	6th	↑ +9
Query about water meter	33	17th	-2	12th	+3
Discolouration	46	17th	-2	5th	+10
Change to taste or smell	38	9th	+6	8th	+7
Limescale in water	88	15th	0	15th	0
Loss of water supply	50	16th	-1	13th	+2
Low water pressure	77	15th	0	14th	+1
Traffic disruption	62	14th	+1	14th	+1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	15th		15th	
Male	234	15th	0	14th	+1
Female	272	15th	0	15th	-1
Age 18-34	108	15th	0	18th	-3
Age 35-64	282	15th	0	12th	+3
Age 65+	120	15th	0	15th	0
SEG AB	151	15th	0	16th	-1
SEG C1C2	251	15th	0	15th	0
SEG DE	104	14th	+1	15th	0
South Staffs Water	364	15th	0	15th	0
Cambridge Water	147	15th	0	15th	0
Meter: Yes	293	15th	0	15th	0
Meter: No	196	15th	0	15th	0
Caring But Time Pressed	110	16th	-1	16th	-1
Engaged Loyal Carers	188	16th	-2	15th	-1
Don't Bother Me	98	9th	+6	9th	+6
Savvy Switchers	45	14th	+1	15th	0
Connected But Hard Pressed	70	15th	0	14th	+1
Vulnerable: Yes	177	15th	0	14th	+1
Vulnerable: No	334	15th	0	15th	-1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	17th	-1	16th	0
Query about bill	52	15th	+1	15th	+1
Query about water meter	33	18th	-2	18th	-2
Discolouration	46	19th	-3	18th	-2
Change to taste or smell	38	19th	-3	19th	-3
Limescale in water	88	17th	-1	17th	-1
Loss of water supply	50	17th	-1	17th	-1
Low water pressure	77	19th	-3	18th	-2
Traffic disruption	62	20th	-4	18th	-2

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	16th		16th	
Male	234	16th	+1	17th	-1
Female	272	17th	-1	16th	+1
Age 18-34	108	17th	-1	16th	0
Age 35-64	282	17th	-1	17th	-1
Age 65+	120	16th	+1	16th	0
SEG AB	151	17th	-1	17th	-1
SEG C1C2	251	16th	+2	16th	+1
SEG DE	104	18th	-2	18th	-2
South Staffs Water	364	17th	-1	16th	0
Cambridge Water	147	16th	+1	16th	0
Meter: Yes	293	16th	+2	16th	+2
Meter: No	196	18th	-2	18th	-2
Caring But Time Pressed	110	15th	+1	15th	+2
Engaged Loyal Carers	188	17th	-1	17th	-1
Don't Bother Me	98	13th	+4	13th	+4
Savvy Switchers	45	20th	-4	18th	-2
Connected But Hard Pressed	70	14th	+4	16th	+1
Vulnerable: Yes	177	17th	-1	17th	-1
Vulnerable: No	334	16th	+1	16th	+1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

WAYS TO CONTACT

They provide a wide range of ways to contact and interact with them that meet all types of customers' needs

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	18th	-1	18th	-1
Query about bill	52	17th	0	18th	0
Query about water meter	33	16th	+1	19th	-1
Discolouration	46	15th	+3	17th	+1
Change to taste or smell	38	14th	+4	14th	+4
Limescale in water	88	18th	-1	18th	0
Loss of water supply	50	18th	-1	18th	0
Low water pressure	77	16th	+1	17th	+1
Traffic disruption	62	17th	0	19th	-1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	17th		18th	
Male	234	18th	-2	16th	+2
Female	272	16th	+2	18th	-2
Age 18-34	108	16th	+2	15th	+3
Age 35-64	282	16th	+1	18th	0
Age 65+	120	18th	-2	19th	-1
SEG AB	151	19th	-2	19th	-2
SEG C1C2	251	17th	0	17th	+1
SEG DE	104	16th	+2	16th	+3
South Staffs Water	364	16th	+2	18th	+2
Cambridge Water	147	18th	-2	20th	-2
Meter: Yes	293	18th	-2	19th	-2
Meter: No	196	16th	+2	17th	+2
Caring But Time Pressed	110	17th	+1	17th	+1
Engaged Loyal Carers	188	18th	-1	18th	-1
Don't Bother Me	98	14th	+4	14th	+4
Savvy Switchers	45	15th	+3	13th	+5
Connected But Hard Pressed	70	18th	-1	19th	-1
Vulnerable: Yes	177	16th	+2	16th	+3
Vulnerable: No	334	18th	-2	19th	-3

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

EDUCATION

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	16th	+2	17th	+1
Query about bill	52	16th	+2	19th	-2
Query about water meter	33	12th	+6	15th	+2
Discolouration	46	16th	+1	11th	+6
Change to taste or smell	38	15th	+2	15th	+2
Limescale in water	88	16th	+2	16th	+1
Loss of water supply	50	15th	+3	16th	+1
Low water pressure	77	17th	+1	16th	+1
Traffic disruption	62	15th	+3	16th	+1

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	18th		17th	
Male	234	17th	+1	18th	-1
Female	272	18th	-1	17th	+1
Age 18-34	108	19th	-2	17th	0
Age 35-64	282	18th	0	16th	+1
Age 65+	120	17th	+1	17th	0
SEG AB	151	16th	+2	15th	+3
SEG C1C2	251	18th	-2	18th	-2
SEG DE	104	17th	0	17th	0
South Staffs Water	364	18th	-1	17th	0
Cambridge Water	147	17th	+1	17th	0
Meter: Yes	293	17th	0	17th	-1
Meter: No	196	17th	0	16th	+1
Caring But Time Pressed	110	18th	-1	18th	-2
Engaged Loyal Carers	188	14th	+6	16th	+3
Don't Bother Me	98	21st	-5	21st	-5
Savvy Switchers	45	18th	-1	16th	+1
Connected But Hard Pressed	70	19th	-3	20th	-4
Vulnerable: Yes	177	18th	-1	18th	-1
Vulnerable: No	334	17th	+1	17th	+1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

METER INSTALLS

They ensure that all customers who want a water meter are able to have one installed

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	19th	+1	19th	0
Query about bill	52	19th	0	17th	+2
Query about water meter	33	19th	0	17th	+2
Discolouration	46	21st	-2	21st	-2
Change to taste or smell	38	18th	+1	18th	+1
Limescale in water	88	19th	0	19th	0
Loss of water supply	50	20th	-1	20th	-1
Low water pressure	77	18th	+1	19th	0
Traffic disruption	62	19th	0	17th	+2

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	19th		19th	
Male	234	19th	0	19th	0
Female	272	19th	0	19th	0
Age 18-34	108	18th	+1	19th	0
Age 35-64	282	19th	0	19th	0
Age 65+	120	19th	0	18th	+1
SEG AB	151	18th	+1	18th	+1
SEG C1C2	251	19th	0	19th	0
SEG DE	104	19th	0	20th	-2
South Staffs Water	364	19th	0	19th	-1
Cambridge Water	147	19th	0	18th	+1
Meter: Yes	293	19th	+1	18th	+1
Meter: No	196	20th	-1	19th	-1
Caring But Time Pressed	110	19th	0	19th	0
Engaged Loyal Carers	188	19th	-1	19th	-1
Don't Bother Me	98	15th	+4	16th	+3
Savvy Switchers	45	17th	+2	19th	0
Connected But Hard Pressed	70	17th	+2	18th	+1
Vulnerable: Yes	177	19th	0	19th	-1
Vulnerable: No	334	19th	0	18th	+1

Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

WEBSITE

They have a website that allows you to find the answer to any queries quickly and easily

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	20th	-1	20th	0
Query about bill	52	20th	0	21st	-1
Query about water meter	33	20th	0	20th	0
Discolouration	46	18th	+2	19th	+1
Change to taste or smell	38	20th	0	20th	0
Limescale in water	88	20th	0	20th	0
Loss of water supply	50	19th	+1	19th	+1
Low water pressure	77	20th	0	20th	0
Traffic disruption	62	18th	+2	20th	0

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	20th		20th	
Male	234	20th	0	20th	+1
Female	272	20th	0	21st	-1
Age 18-34	108	21st	-1	21st	-1
Age 35-64	282	20th	0	20th	0
Age 65+	120	20th	0	20th	0
SEG AB	151	20th	0	20th	0
SEG C1C2	251	20th	0	20th	+1
SEG DE	104	21st	-1	21st	-1
South Staffs Water	364	20th	0	21st	-2
Cambridge Water	147	20th	0	19th	+2
Meter: Yes	293	20th	-1	20th	0
Meter: No	196	19th	+1	20th	0
Caring But Time Pressed	110	20th	0	21st	-1
Engaged Loyal Carers	188	20th	-1	21st	-1
Don't Bother Me	98	16th	+4	19th	+1
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Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

SEGMENTATION ANALYSIS

COMMUNITY

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

Service issue ⁽¹⁾	Base ⁽²⁾	Uninformed		Informed	
		Rank	Difference ⁽³⁾	Rank	Difference ⁽³⁾
Any service issue	285	21st	0	21st	0
Query about bill	52	21st	0	20th	+1
Query about water meter	33	21st	0	21st	0
Discolouration	46	20th	+1	20th	+1
Change to taste or smell	38	21st	0	21st	0
Limescale in water	88	21st	0	21st	0
Loss of water supply	50	21st	0	21st	0
Low water pressure	77	21st	0	21st	0
Traffic disruption	62	21st	0	21st	0

Note: Significant differences highlighted; (1) see beginning of this section for issue descriptions used in the questionnaire; (2) base unweighted; (3) for each issue, difference relative to those who did not experience that issue

Segment	Base ⁽¹⁾	Uninformed		Informed	
		Rank	Difference ⁽²⁾	Rank	Difference ⁽²⁾
Full sample	511	21st		21st	
Male	234	21st	0	21st	-1
Female	272	21st	0	20th	+1
Age 18-34	108	20th	+1	20th	+1
Age 35-64	282	21st	0	21st	0
Age 65+	120	21st	0	21st	0
SEG AB	151	21st	0	21st	0
SEG C1C2	251	21st	0	21st	-1
SEG DE	104	20th	+1	19th	+2
South Staffs Water	364	21st	0	20th	+1
Cambridge Water	147	21st	0	21st	-1
Meter: Yes	293	21st	0	21st	0
Meter: No	196	21st	0	21st	0
Caring But Time Pressed	110	21st	0	20th	+1
Engaged Loyal Carers	188	21st	0	20th	+1
Don't Bother Me	98	20th	+1	20th	+1
Savvy Switchers	45	21st	0	21st	0
Connected But Hard Pressed	70	21st	0	21st	0
Vulnerable: Yes	177	20th	+1	20th	+1
Vulnerable: No	334	21st	-1	21st	-1

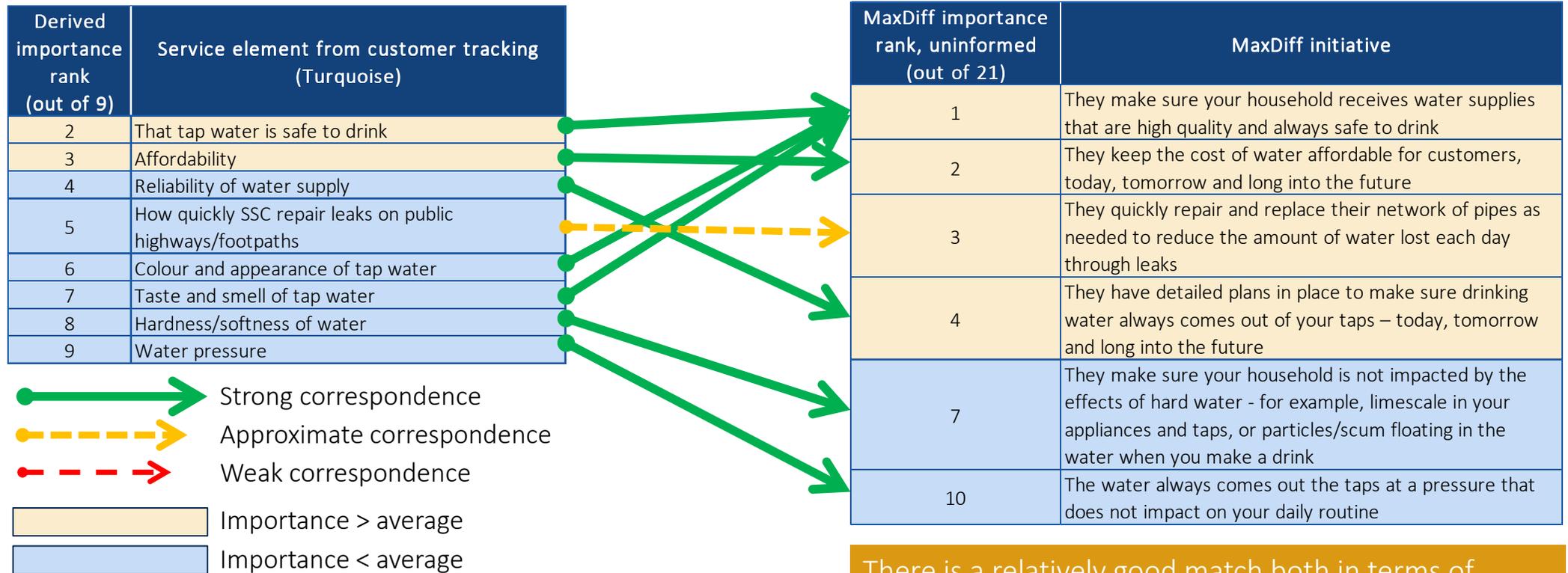
Note: Significant differences highlighted; 'Vulnerable': someone in household on PSR and/or on benefits and/or gross annual household income < £16,380; (1) base unweighted; (2) difference relative to 'Other' (eg SEG DE vs SEG AB & C1C2 combined)

APPENDIX B LINKING TO C-SAT



DERIVED IMPORTANCE AND MAXDIFF PRIORITIES

SERVICE ELEMENTS



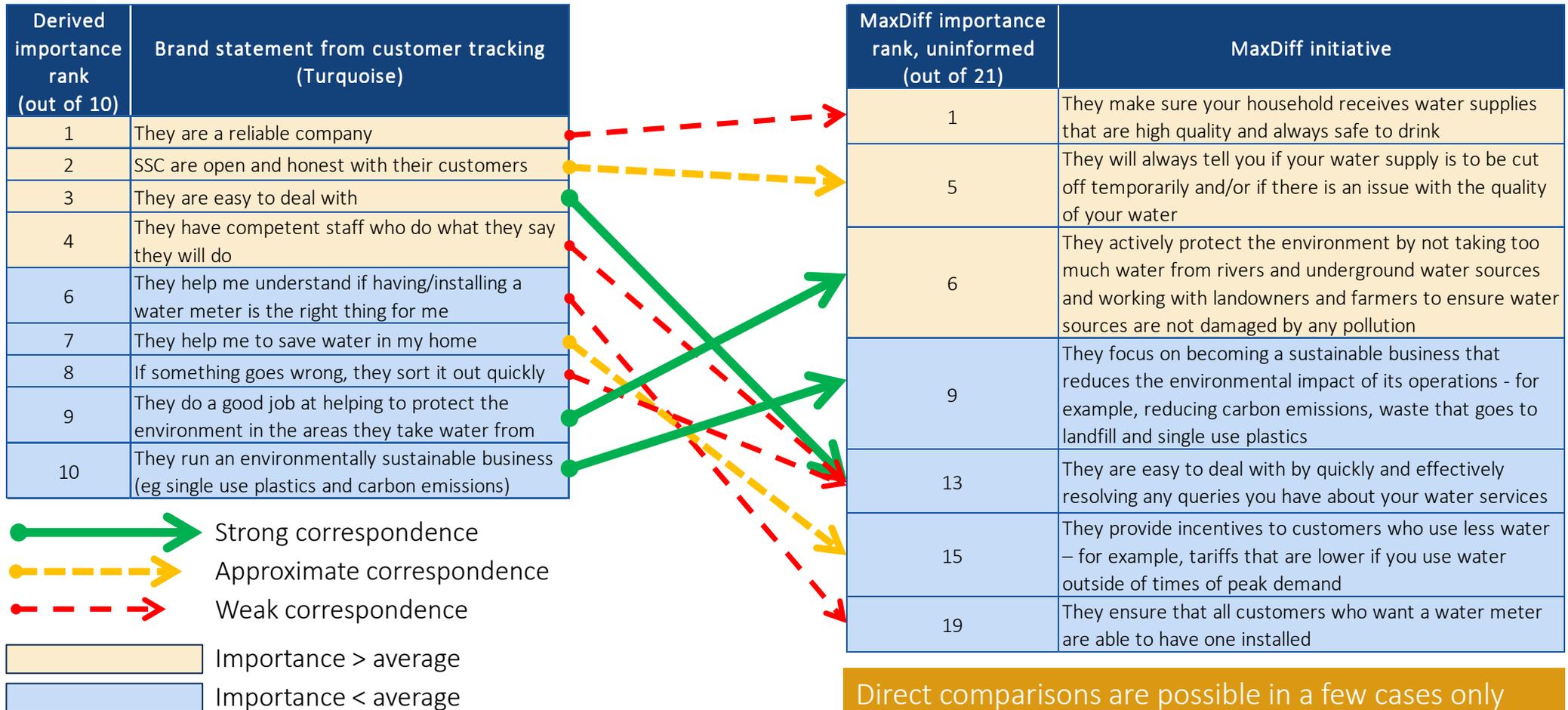
There is a relatively good match both in terms of

- correspondence between elements tested in customer tracking and MaxDiff initiatives and
- rankings of service elements/initiatives

Note: The top ranked service element 'Value for money' could not be mapped

DERIVED IMPORTANCE AND MAXDIFF PRIORITIES

BRAND STATEMENTS



Note: The statement 'They have a good reputation' (rank 5) could not be mapped

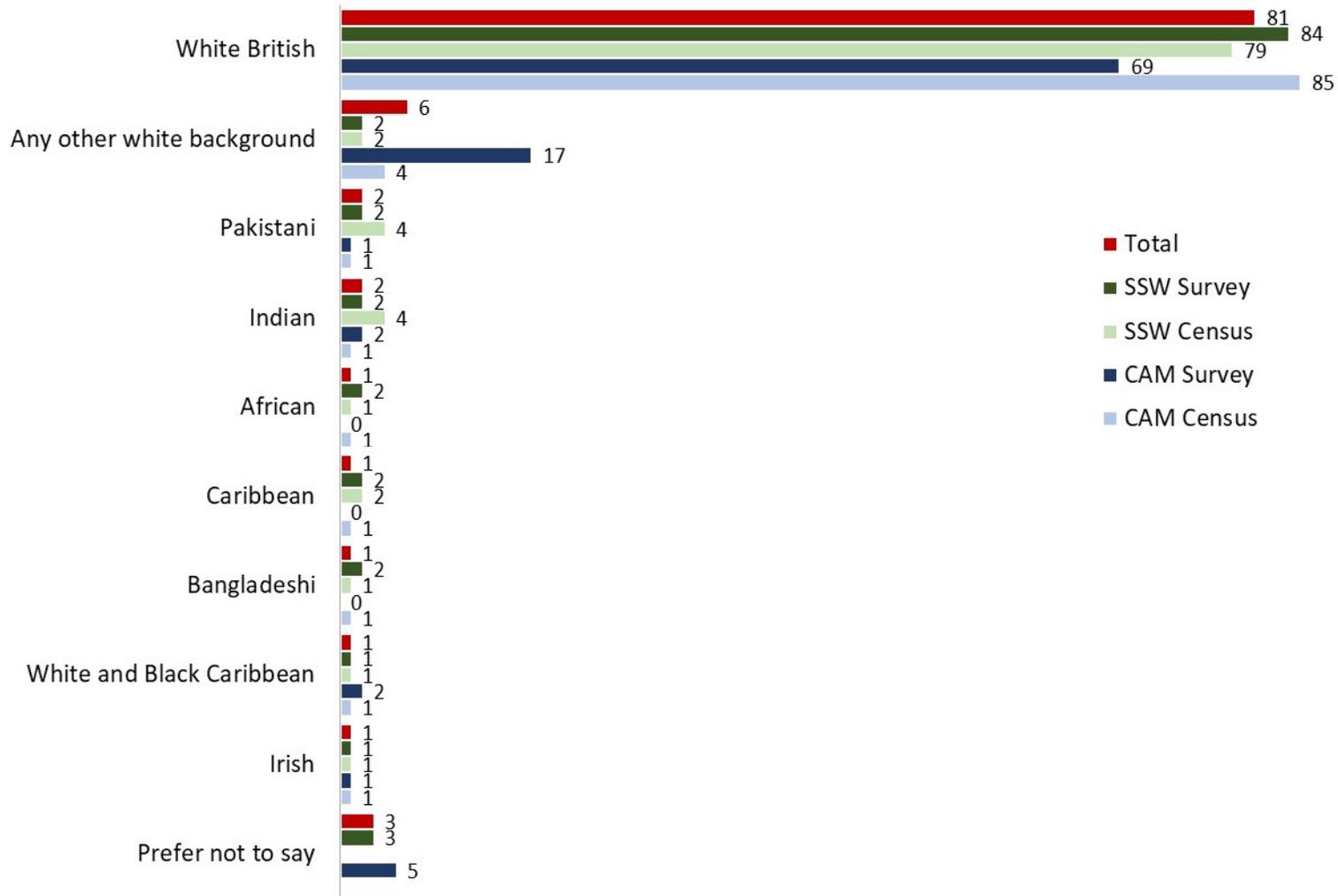
APPENDIX C

PARTICIPANT ETHNICITY & ATTITUDINAL SEGMENT



PARTICIPANT CHARACTERISTICS

ETHNICITY



PARTICIPANT CHARACTERISTICS

ATTITUDINAL SEGMENT YEAR 1

Customer Segment %	Overview of segment	Original Segmentation PR19 - 2018	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	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	37
C	Often financially and time pressured. Strong preference for being on-line and using social media.	16	15
D	Highly engaged with using the 'latest' technology and managing their lives online. Switched on to saving water.	9	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	20

APPENDIX B

QUESTIONNAIRES



3410
SSC Priorities Tracker: Year 1

Given the challenges of 2020, 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 minutes to complete. Thank you for taking the time to provide your feedback.

Q1. Please be assured that any data collected during this interview will be held securely and will not be shared with any third party unless you give permission. Our privacy statement is available at: <https://www.accent-mr.com/privacy-policy/>.

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

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 64
65 to 74
75 or over
Refused

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

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

State only
Private only
Both

Q7. **IF Q6 = PRIVATE OR BOTH. OTHERS GO TO Q8:** How would you describe the chief 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. 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. 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



APPENDIX B

QUESTIONNAIRES

Prefer to self-identify / Other
Prefer not to say

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	IP
DY	LE
ST	PE
WS	SG
WV	

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

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 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 clean 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**).

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

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

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

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**

Understanding what's important

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

What's your number one priority

APPENDIX B

QUESTIONNAIRES

Q19. And now think about what you want them to do after they have a good long-term plan and/or are doing a great job for your number one priority. What else do you want them to focus on? Please tell us up to two additional priorities for you

What's your number two priority
And your number three 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.

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.

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 the taps at a pressure that does not impact on your daily routine

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 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 that meet all types of customers' needs – e.g. phone, website, webchat, e-mail, mobile APP, letter, face-to-face

ATTRIBUTE DESCRIPTION: They have a website that allows you to find the answer to any queries quickly and easily

ATTRIBUTE DESCRIPTION: They ensure that all customers who want a water meter are able to have one installed, even if it costs the company more money than normal to install one due to constraints at the property

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

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:

APPENDIX B

QUESTIONNAIRES

- 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 one?
- Q22. And why did you select #insert least important attribute selected at MaxDiff1# as the least important area for them to focus on?
- 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. MaxDiff6: From the four options below please select the one you think is the most important for South Staffs Water/Cambridge Water to focus on and the one which is the least important:
- 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. You are one of the first people to take part in this important study. 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 ticket 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.

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

INSERT INFORMATION: one slide per screen

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

Screen 1: 7 seconds

Screen 2: 10 seconds

Screen 3: 10 seconds

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

NEW PAGE

South Staffs/Cambridge Water is regulated by Ofwat and has to submit a Business Plan every five years that outlines the services 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:



APPENDIX B

QUESTIONNAIRES

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 is no bacteria, viruses, chemicals or micro plastics in it. In 2019/20, 9.2 out of every 10,000 properties had to contact their water company about the appearance of their water. This is slightly better than the industry average across all water companies.

The company will 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.

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 14%/28% of customers in the South Staffs Water/Cambridge Water region are dissatisfied with the hardness of their water.

ATTRIBUTE DESCRIPTION: South Staffs Water/Cambridge Water will 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 South Staffs Water/Cambridge Water counts the number of properties that are affected.

In 2019/20, the average interruption time was 3.21 minutes, compared with the national industry average of 11 minutes.

ATTRIBUTE DESCRIPTION: The water always comes out the taps at a pressure that does not impact on your daily routine

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 to fast or slowly.

An independent survey in 2019/20 showed that less than 5 of every 100 customers (5%) said that they are dissatisfied with the pressure of their water supply

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

INFO BUTTON TEXT: All water pipes leak over time and it is up to South Staffs Water/Cambridge Water to prioritise the ones 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 19% #SOUTH STAFFS WATER# 16% #CAMBRIDGE WATER# of treated water is lost to leaks each day. This is slightly better 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 company currently holds mobile numbers for six out of 10 of its customers and the app is used to receive alerts and updates by customers in 44,300 of the 700,000 properties they serve.

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.

APPENDIX B

QUESTIONNAIRES

Currently, in an independent survey, 81% of 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 that meet all types of customers' needs

INFO BUTTON TEXT: Regular investment in this area is needed to make sure that all customers can contact South Staffs Water/Cambridge Water using the best method for them. This includes customers with accessibility needs and those who are unable or prefer not to use digital and online services. The range of options currently available includes phone, letter, email, mobile app, webchat, in person at the Community Hub in Wednesbury and (COVID-19 safe) home visits. T

here are many new services out there for the company to look at, such as video calls with their customer service team – such as showing them a leaking pipe.

ATTRIBUTE DESCRIPTION: They have a website that allows you to find the answer to any queries quickly and easily

INFO BUTTON TEXT: Regular investment in this area needed to make sure that the website works effectively on all computer and mobile devices. There is a MyAccount service, which allows customers to manage their bills or payment plans, meter readings and account details online. The more investment is made the more often the features and services on the website can be updated.

ATTRIBUTE DESCRIPTION: They ensure that all customers who want a water meter are able to have one installed

INFO BUTTON TEXT: Currently 42% (South Staffs Water)/72% (Cambridge Water) of customers have a water meter installed. On the rare occasions where it's not possible to install a meter (for example, in properties with a shared water supply or where there is not a suitable place to fit the meter internally or externally) South Staffs Water/Cambridge Water works with customers to assess and then agree with them what charges they pay based on the details of the property and the number of people living there.

More than 85% of customers have a lower water bill once they've switched to a meter.

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: 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.

Meters are currently read once a year #SOUTH STAFFS WATER# twice a year #CAMBRIDGE WATER#. 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.

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 could aim 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.

ATTRIBUTE DESCRIPTION: The 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 of 128 #SOUTH STAFFS WATER# 131 #CAMBRIDGE WATER#).

APPENDIX B

QUESTIONNAIRES

Your water company is currently working with developers to make sure that 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 23,400 customers on the register. The company also now offers a dedicated hotline to over 1,000 of the most vulnerable customers to provide a more hands-on support service.

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 26,000 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 is expecting this number to increase because of the COVID-19 pandemic.

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 2019 and 31 March 2020, almost 5,000 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# 62% 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

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 one?

Q36. And why did you select #insert least important attribute selected at MaxDiff1# as the least important for them to focus on?

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. MaxDiff12: 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

Impact of the Pandemic

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'.

APPENDIX B

QUESTIONNAIRES

Q42. Since the start of the first COVID-19 pandemic lockdown in March 2020, have you seen changes in how much water you/your household use at home?

- Yes: I/we use a lot less
- Yes: I/we use a little less
- No: I/we have not changed the amount I/we use
- Yes: I/we use a little more
- Yes: I/we use a lot more
- Don't know/not sure

Q43. **ASK IF CODES 4 OR 5 AT Q42. OTHERS GO TO Q45:** Which of the following do you think has most led to the increase in your water usage? Please pick your top 3 increased.....

- Use of the washing machine
- Use of the dishwasher
- Number of showers taken
- Length of showers taken
- Number of baths taken
- Use for drinking – tea/coffee/cold drinks
- Number of toilet flushes
- Hand washing
- Watering the garden more
- Washing the car more
- Doing more DIY projects around the house and/or in the garden/yard
- Other – please type in:

Q44. Which of the following reasons has contributed the most to the increase in your water usage?
SINGLE CODE

- Working from home more than before the pandemic
- Having children at home more than before the pandemic
- Not going out as much as before the pandemic
- Taking holidays, but using home as a base
- Other – please type in:

Q45. Which of these options most closely describes your current working situation?

- Currently furloughed
- Recently lost my job/made redundant
- Employed, full or part time– still travelling to my usual workplace
- Employed, full or part time – mostly working from home due to COVID-19
- Employed, full or part time – mostly working from home and have been since before the impacts of COVID-19
- Not working – e.g. full time carer, long-term unemployed, retired, student and not working part time
- Prefer not to say

Q46. Has your household income been affected, or will be affected into next year?

- Household income has/will increase
- Household income has/will remain the same
- Household income has/will reduce slightly
- Household income has/will reduce significantly
- Not sure yet
- Prefer not to say

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	
Within the next 3 months	1	2	3	
In the next 3-6 months	1	2	3	
In the next 6 months to 1 year	1	2	3	
In more than 1 year's time	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 want 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 supplier every year to get the best price

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

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

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

Q51. We want to take account of the views of people on 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
--	----------	----------

APPENDIX B

QUESTIONNAIRES

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

Up to 5 years0.....1.....2.....3.....4.....5+
6 to 15 years0.....1.....2.....3.....4.....5+
16 to 65 years0.....1.....2.....3.....4.....5+
Over 65 years0.....1.....2.....3.....4.....5+
Household size	

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

- 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 summer 2021 and a link will be sent to you by e-mail.

- Yes
No

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 for clarification purposes, 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

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

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

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



Cambridge Water's and South Staffs Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,580km of pipes, powered by 113 pumping stations
- Operate 40 water treatment works
- 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: 42% of customers have meters in the South Staffs region/72% 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 almost 25,000 customers with discounted bills and assist when needed over 33,600 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



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**

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

South Staffs Water's and Cambridge Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,580km of pipes, powered by 113 pumping stations
- Operate 40 water treatment works
- 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: 42% of customers have meters in the South Staffs region/72% 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 almost 25,000 customers with discounted bills and assist when needed over 33,600 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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