# South Staffs & Cambridge Water

Findings from the WRAP (Water Resources Advisory Panel) DEEP DIVES on universal metering and water transfers

November 2021

community research

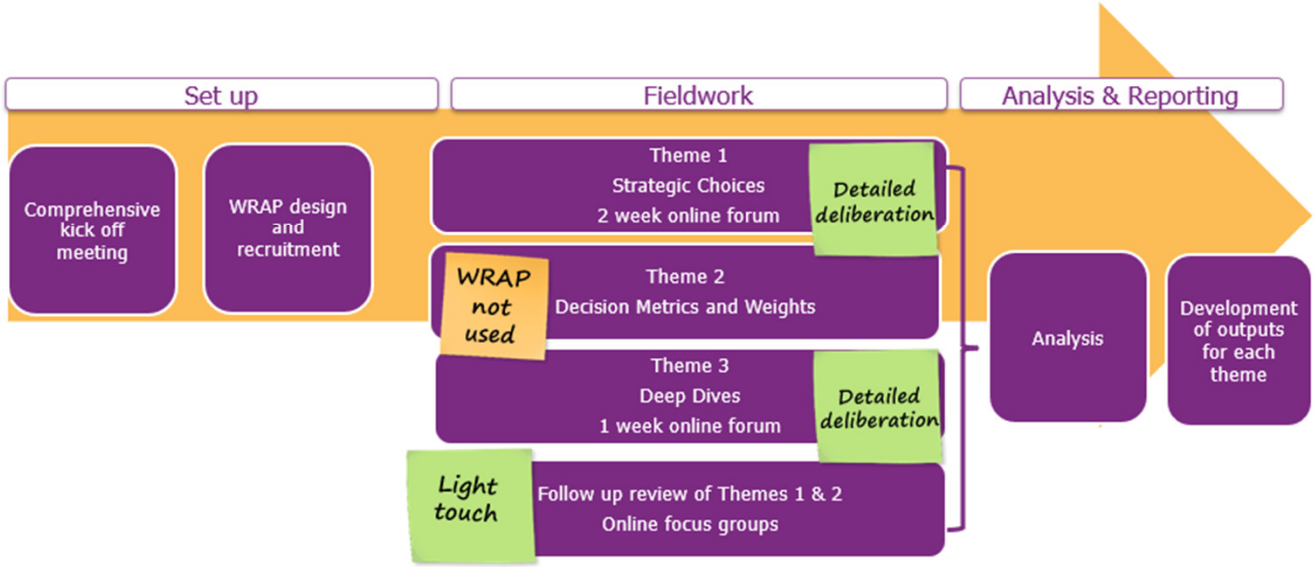
*Bringing the voices of communities into the heart of organisations*

# Background and approach

# Project background

- A comprehensive desk research study carried out by Accent/PJM (Dec-Feb 2020) recommended SSC undertake a four themed customer research programme to ensure customers' preferences underpinned the WRMPs in both supply regions
- In June 2021, SSC appointed Community Research to undertake the qualitative elements of the programme and Accent/PJM the quantitative elements

## The WRAP programme



## Theme 1 Strategic choices

To explore household customer, future customer and SME business customer preferences in terms of:

- Environmental ambition
- Levels of service/resilience ambition
- Water efficiency ambition: leakage/PCC/metering
- Best value planning criteria

To ensure a "golden thread" of customer preferences in these strategic areas, which sets the context for the remainder of the engagement programme.

## Deep dives

This deck covers the qualitative findings from the Deep Dives which built on discussions in the Theme 1 discussions to explore household customer, future customer and SME business customer views in depth on:

- Universal metering
- Water transfers

# A deliberative journey

## Features of deliberative research

- Information is gradually provided to participants to take them on a journey from uninformed to informed
  - This provides us with spontaneous responses, as well as considered and informed viewpoints
- Heterogenous (rather than homogenous) groups of participants, so that people are exposed to a perspectives from people from a range of backgrounds

Due to COVID-19 the research was all conducted online

## Reconvening participants

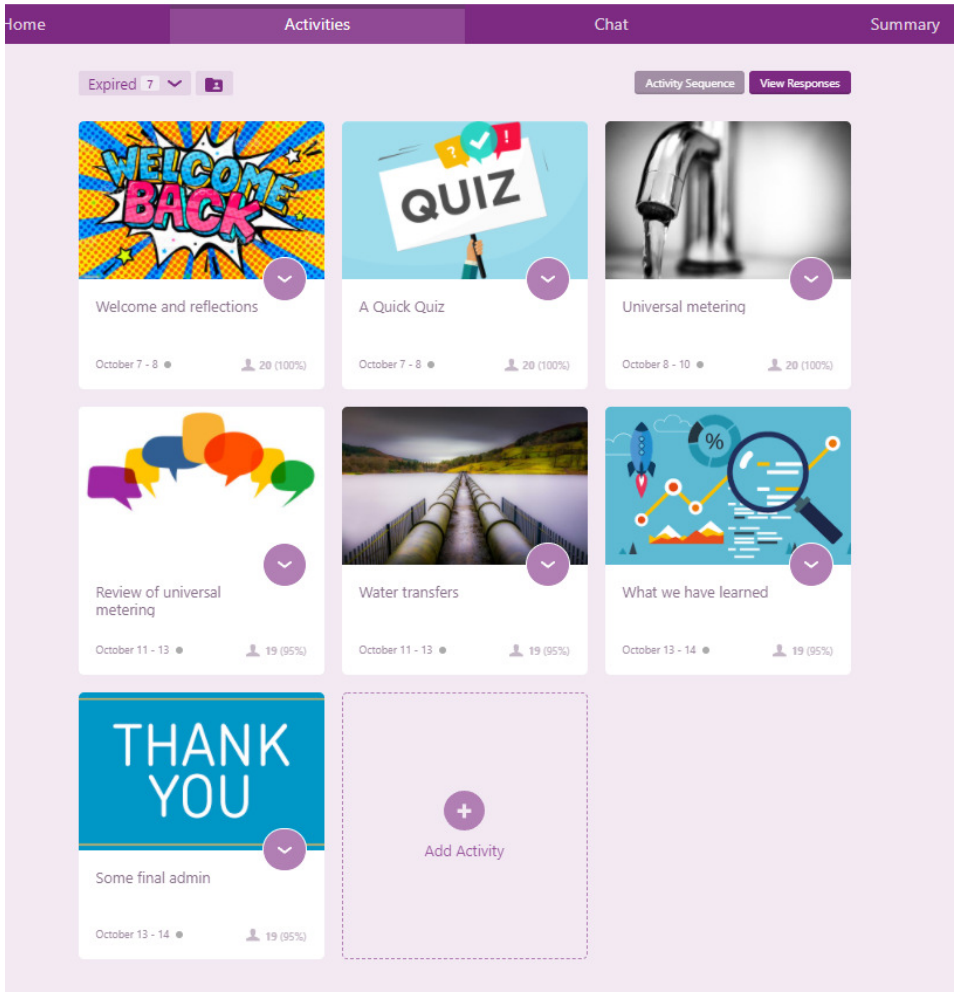
- Participants took part in an initial deliberative forum in July that lasted 2 weeks
- Meaning that their knowledge and understanding of water issues has developed over time
- Some (approx. ¾) indicated that they were more tuned into water related news articles and/or more aware of their water usage behaviour in the period between the forums.

16/40 gave examples of how they had made changes to reduced their water consumption.

*I'm trying to be quicker in the shower. Only using the dishwasher and washing machine when I have a full load. Replaced my toilet for a water saving one Marie (billpayer)*

*I try save a lot more water each day and have created a little project at home for the family to compare the monthly usage to each water saving activity completed. Luke (billpayer)*

# The online forum



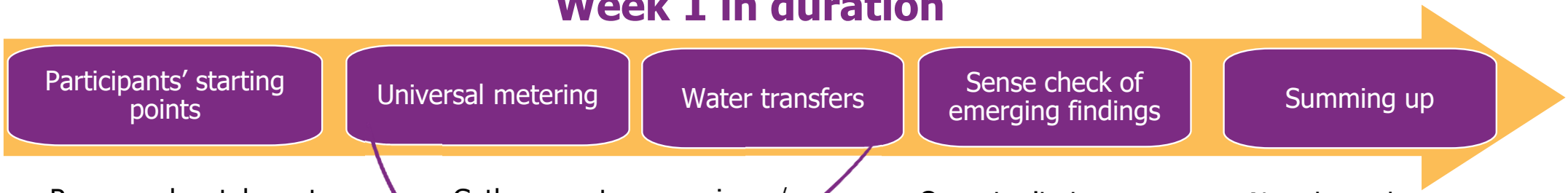

Participants were provided with a series of tasks to complete online, including polling questions, discussion boards and self-filmed videos.

Participants were also invited to comment on each other's posts to generate discussion amongst participants on the key topics.

In one of the final tasks, the emerging findings were shared with participants to gauge their reactions to the wider group view. This was a way of increasing engagement and a response to learnings from the first Forum.

# The core content was the same in each region

## Week 1 in duration




- Recap on key take outs from the previous Forum
- Brief look at smart meters in relation to gas/electricity
- Initial views of universal metering

- Gather spontaneous views / attitudes on each topic
- Provision of information in a variety of forms. Including information about different options considered in each area. Highlighting any considerations and, if relevant, associated costs
- Leading to a more informed discussion of the topics

- Opportunity to sense check some of the emerging findings by asking participants to identify any surprises or concerns.

- Note key take-outs and film video selfie (if wish to do so)

Copies of the stimulus materials used are provided in the Appendix

# Our sample

40 participants in total took part in the Deep Dive:

| Water company | | |
|---|---|---|
| | **Forum 1** | **Forum 2** |
| Cambridge Water | 25 | 20 |
| South Staffs Water | 22 | 20 |

| Type of customer | | |
|---|---|---|
| | **Forum 1** | **Forum 2** |
| Billpayers | 28 | 26 |
| Future customer | 9 | 6 |
| Small business | 10 | 8 |

*The main difference between the two activities was that fewer future customers took part. Only 1 of the PSR participants elected not to take part.*

Further details are provided in the Appendix

# Views of the research experience

Mean average scores

South Staffs Water

Cambridge Water

**Overall satisfaction** with research experience (10-point scale)

Overall, how would you rate your experience of taking part in this research on a scale of 1-10, where 1 is very poor and 10 is excellent?

8.7

8.6

Very similar overall ratings to the previous forum for Theme 1

A number of comments about the time taken and the amount of information to assimilate

*I have really enjoyed being a part of this research, I have learnt quite a lot of things that I didn't know before and it is refreshing to be asked your opinion on something that could be very critical in the future. Asma (billpayer)*

Only 1 participant does not want to be recontacted to take part in any live online groups that are conducted

*I felt much more engaged this time. I think it's because I'm familiar with the format and more passionate about our water supply. Selena (billpayer)*

Further details are provided in the Appendix

# Notes on the approach

Please bear in mind this is **qualitative** research:

- Those who participated in this research 'opted in' to the process It could be that those who opted into the process are different in some way than other customers / citizens.
- It is also important to note, whilst polling results have been reported, qualitative research is not intended to be statistically reliable and, as such, does not permit conclusions to be drawn the wider population.
- Quotes have been included to illustrate particular viewpoints. The views expressed do not always represent the views of all those who participated. Cambridge quotes are shown in purple and SSW in yellow.

*The online forum approach is a trade-off*

You get much more from each person than from face to face groups / workshops, but less interaction and reaction...we recommend that online live groups are conducted to fill this gap, if felt necessary

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# The headlines

# The headlines (golden threads)

**Universal metering**

- Metering is strongly supported – as in the previous Theme 1 forum. It is believed to encourage behaviour change and considered the fairest way of paying for water. The majority would like it fully introduced within 10-15 years.
- In terms of rollout, the option which minimises the demand for water was prioritised. Retrofitting was not seen as such high priority, but it could be part of a combined approach.
- Spontaneous calls for support for customers in vulnerable circumstances and welcome for proposed packages. But recognition that times are getting tougher for everyone (energy price rises) so need to be mindful or how much customers are being asked to contribute. More detail on support packages gave some pause for thought (particularly the mention of free appliances). On the whole, participants found it difficult to make assessments based on fairness – as they felt that any decision was always detrimental to someone.

**Water transfers**

- Water transfers were generally supported but the whole topic raised many questions and feedback was less clear cut than for universal metering.
- The environmental impacts were raised immediately by Cambridge participants and concern/debate was a running theme throughout discussions.
- Who pays was also a slightly vexed question – there was a general feeling that it is positive to think about supply on a regional or national level (and to consider water as a shared resource) but the need to have tangible benefit (whether in terms of the environment, security of supply or revenue) was apparent.

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## Key themes

**Transparency and engagement to understand context for and impact of any proposed changes**

**A focus on fairness and collective action/sharing resources**

**A strong desire to take action sooner rather than later. Generally driven by concern for the environment**

**A wide, but not universal, call to protect vulnerable customers**

*Themes are consistent with Theme 1 research and Accent's priority tracker research*

Participants' experience of meters

# Presence of smart meters does not always result in behaviour change

As context, participants were asked if they had a gas/electricity smart meter at home that provided information on how much energy they used on a continuous, daily or weekly basis

Almost half of participants (19/40) had an energy smart meter

South Staffs Water

- **7 out of 20** had a gas/electricity smart meter
- But only a minority (2/7) report any behaviour change as a result (e.g. being more likely to switch lights off)
- Whilst not making direct links to behaviour change, others did report greater awareness of the cost of running appliances
- Several attribute the lack of behaviour change to the fact that they have always been careful with their energy use.

Cambridge Water

- **12 out of 20** had a gas/electricity smart meter
- With 8/12 believing that it had changed their behaviour (e.g. turning appliances off standby, using energy efficiency lightbulbs, switching lights off)
- Two reported that their smart meter was less accessible/easy to read/not in real time and, therefore, and made minimal impact.

*In all honesty it has not made me change how I use my gas/electric but it has made me more aware of what appliances use more and allows me to keep constantly up to date with the cost per day. Shareen (billpayer)*

*Yes it has made a difference. Being able to physically see what I'm using has helped me lower that amount. If I wake up and it already says I have spent £3 I want to know why – looking for appliances etc that have been left on. Sam (billpayer)*

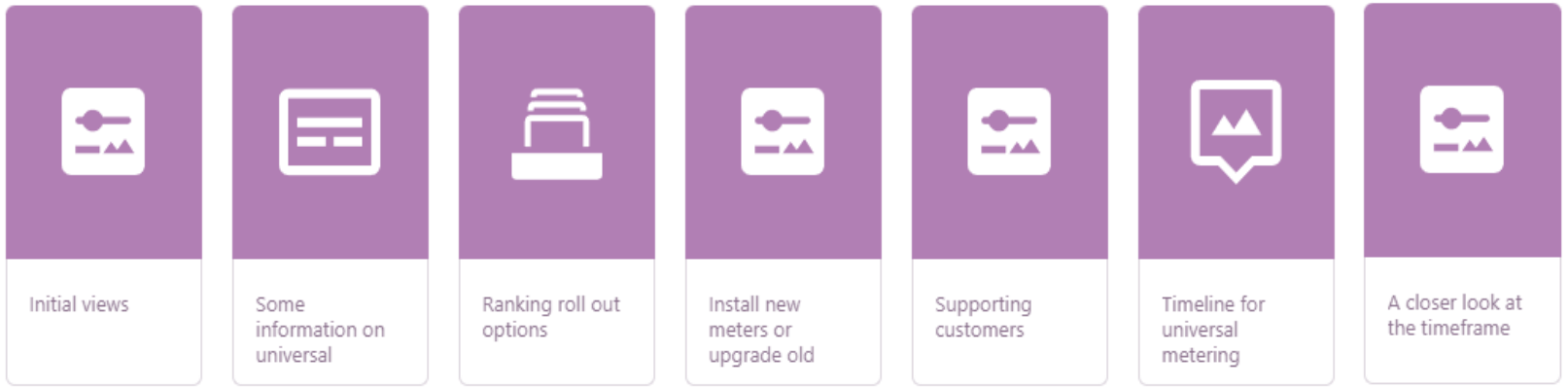
# Views on universal metering

# Universal metering

**Context**
Cambridge and South Staffs Water have recently been classed as water stressed and can now consider bringing in universal metering.

**Objectives**
- To understand customers' initial and considered reactions to universal metering.
- To understand how best to approach the implementation of a universal metering programme (in terms of the focus of the roll out, supporting customers).

**Process / approach**




| | | | | | | |
|---|---|---|---|---|---|---|
| Recap and initial thoughts on universal metering as a policy | Animation explaining the different types of meters and the possible roll out options | Rank different roll out options | Explore whether the focus within the roll out options should be on fitting new meters or upgrading existing meters | Video to explain possible support options to participants before asking them their views | Heatmap exercise asking participants how quickly universal metering should be rolled out, if it goes ahead | Explore costs associated with universal rollout timeframe, metering the difficult to reach properties, frequency of meter reads |

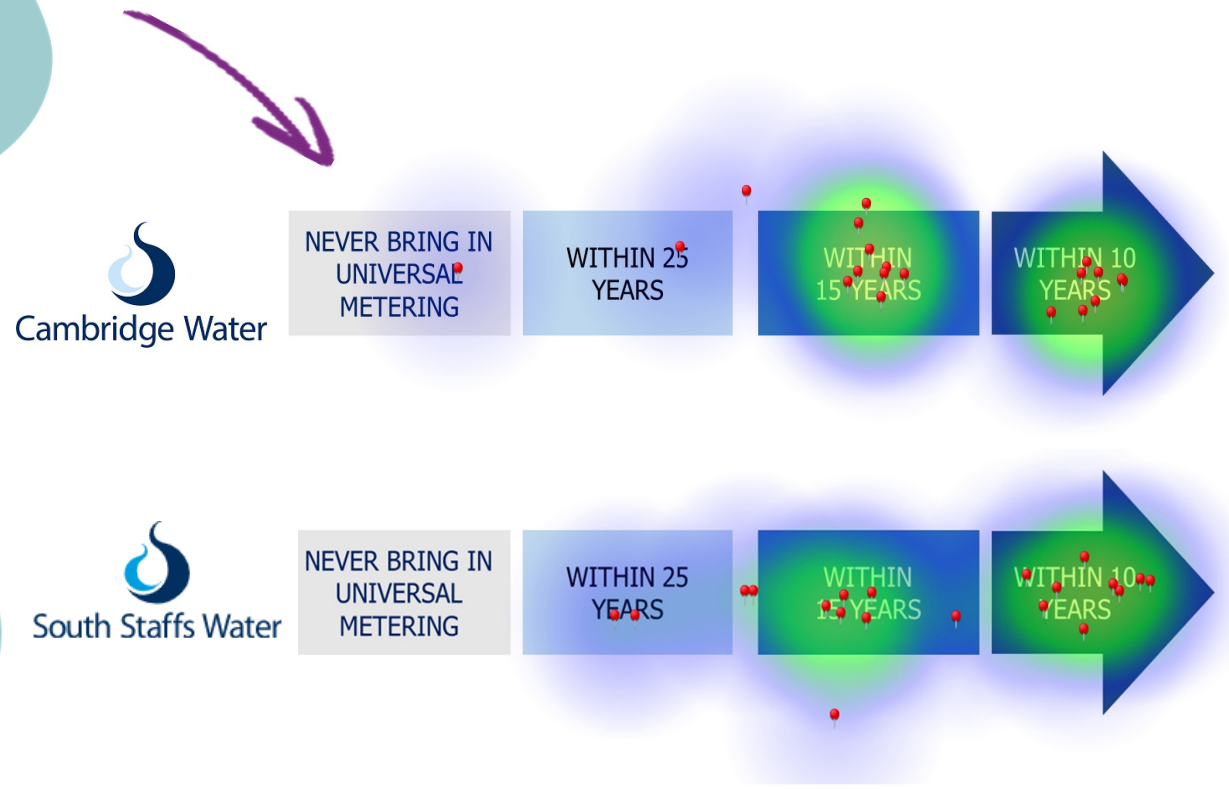
# Key takeouts

**Call for a universal metering programme to prioritise reducing the demand for water as quickly as possible**

**Majority want to see universal metering fully implemented in the next 10-15 years**

**Agreement with the need to support customers through the transition (although caveated)**

**Focus on installing new meters (or retrofit and install new at the same speed) to support achieving this**



# Behind the headlines

**Surprises / learning:**

Participants initially assumed that the percentage of households and businesses on a water meter is lower than it actually is, in both regions.

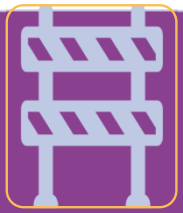
Half prefer to receive detailed information on their water use at their home or business quarterly or less.

**Thoughts / justifications**

Metering is strongly believed to encourage behaviour change and is considered the fairest way of paying for water

Getting all customers on a new meter is therefore seen as more of a priority than updating older meters. As those on a meter already are believed to be more mindful of water consumption

It is generally believed to be right to support the most vulnerable customers. However, water companies need to consider how much customers are being asked to contribute. Recent energy prices rises have brought household bills to the forefront of peoples' minds and there is recognition that household budgets are being squeezed.



**Caveats / limitations**

Need to consider bill impact in the round

Most participants were willing to pay more to have universal metering implemented ahead of 2050 but may not have considered this in the context of all other proposed bill increases (relating to water transfers, more frequent information on usage etc).

May need to pay particular attention to households that are just about managing.

Not all see value in more frequent meter readings and detailed information on water usage – may need to think how best to communicate benefits

# Continued support for the introduction of universal metering

- The vast majority of participants in both regions are supportive of universal metering from the outset:
  - Predominantly because it is regarded as a fairer way to pay
  - Also take on board that metering helps prompt necessary behaviour changes and reduces demand
- With some adding the caveat that vulnerable customers will need to be supported

*I think universal metering should become policy as I have always thought water meters are a great thing to have. However, I think South Staffs should also be mindful of people on lower incomes and make it fair that they aren't always worried about how much water they have used and be charged for.*
*Dylan (future customer)*

**There was strong agreement with compulsory/ universal meters at the first forum. This has not changed but views appear to have strengthened (on learning about living in a water stressed area)**

- The very small minority that are less supportive are concerned about:
  - The impact on the change on their household bills
  - That customers will lose the freedom to choose and that the feeling of being coerced could result in a backlash to metering

*I think forcing people onto it will be met with opposition, people get used to their ways and not everyone will like it. Shanif (billpayer)*

**Rationale for support and concerns outlined are similar to those found in the Sept 2021 WRE Club customer research project**

# Initial assumptions about the background to universal metering

14/20 SSW participants and 17/20 Cambridge participants assumed they lived in an area that was classed as water stressed

13/20 SSW participants and 17/20 Cambridge participants initially assumed the level of household metering was lower than in actually is

12/20 SSW participants and 12/20 Cambridge participants could not recall the frequency of their meter readings

17/20 SSW participants and 19/20 Cambridge participants recognised that all new builds were already required to be built with a water meter installed

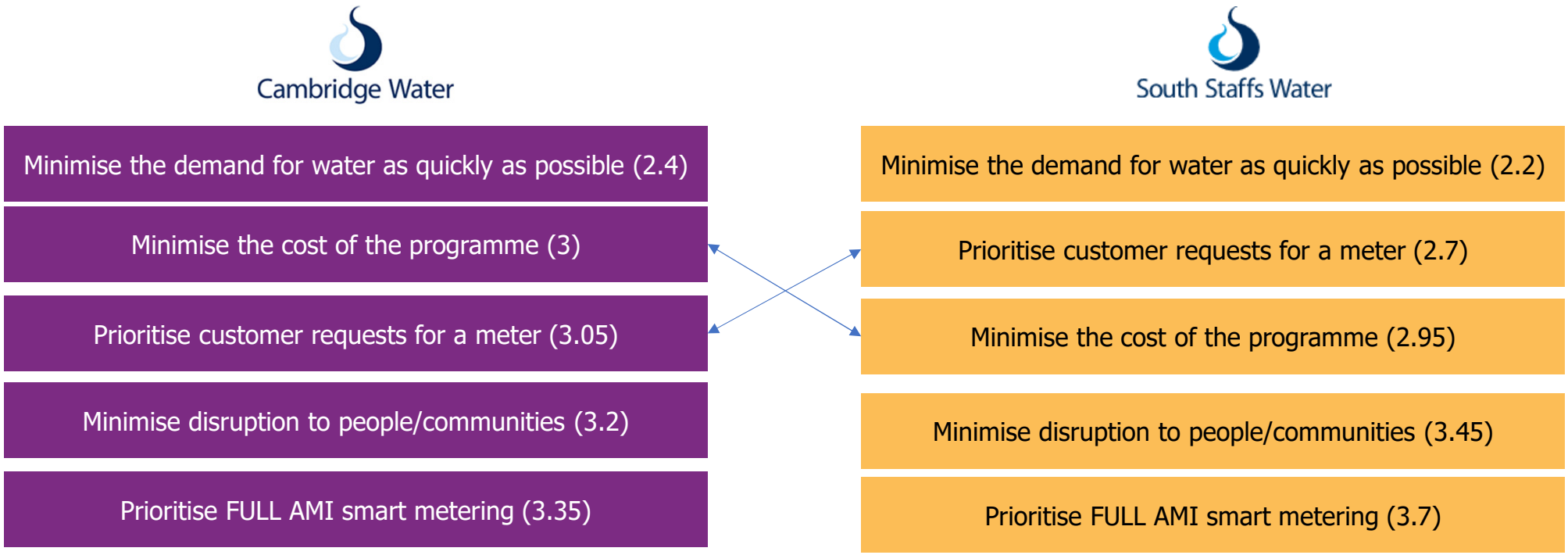
6/20 SSW participants and 15/20 Cambridge participants initially assumed that water usage dropped by 15% when a water meter was fitted

**Participants were asked to take part in a Quick Quiz. The format is designed to get an overall idea of participants knowledge/starting point on a subject BUT MORE IMPORTANTLY it is a method of imparting knowledge. After each question participants are presented with correct background information to inform future discussion**

# Minimising the demand for water prioritised out of roll out options

Rank the roll out options in order of preference – keeping in mind what would be fairest for your own household

Mean scores are out of 5 (1 being highest preference and 5 being lowest preference)

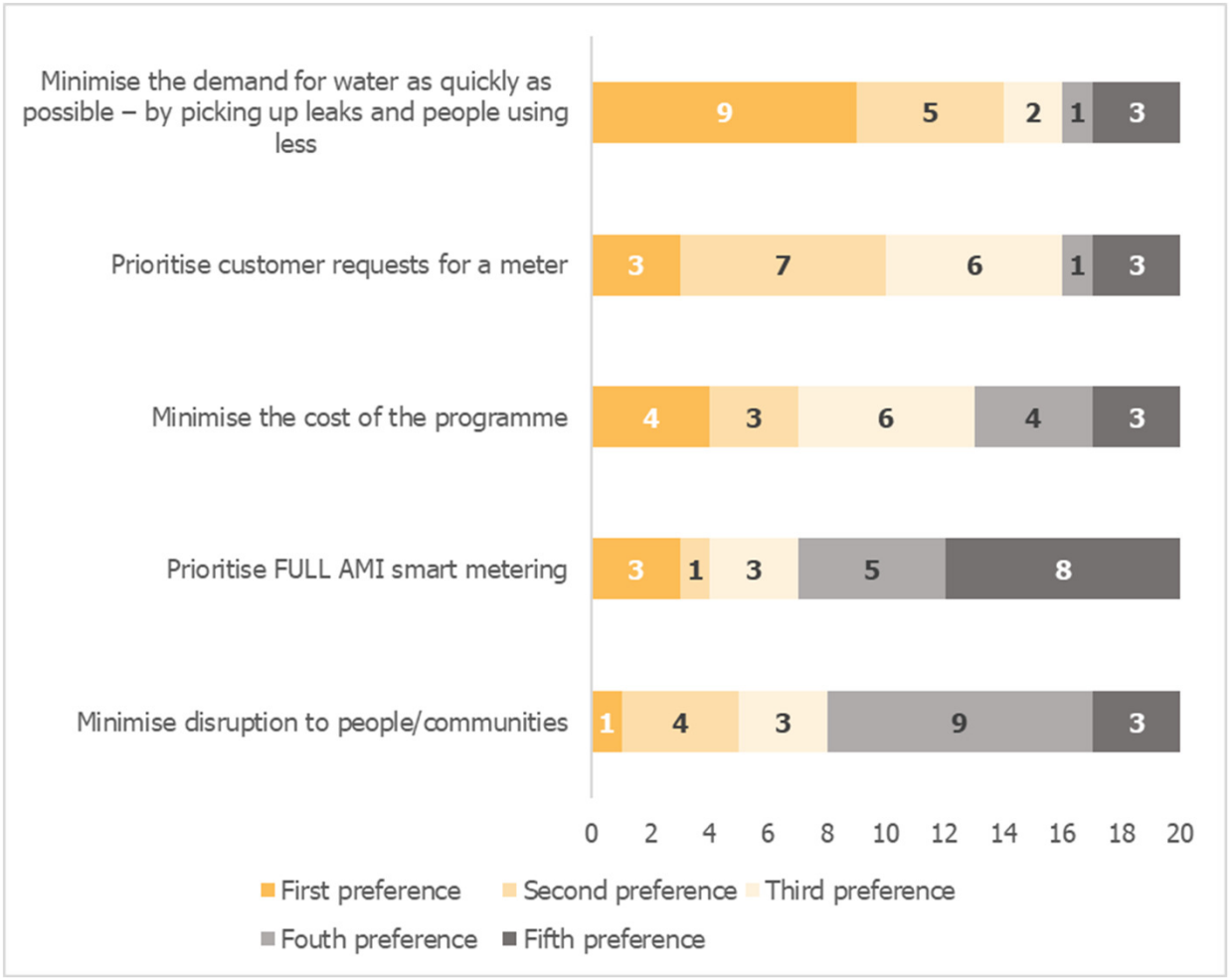



*Minimising water use/leaks seems like the overarching aim behind the whole idea, and speed is of the essence. Beverley (billpayer)*

Note: Even with explanation some participants may have found the difference between AMI and AMR metering confusing.

# Breakdown of preferences by region - SSW

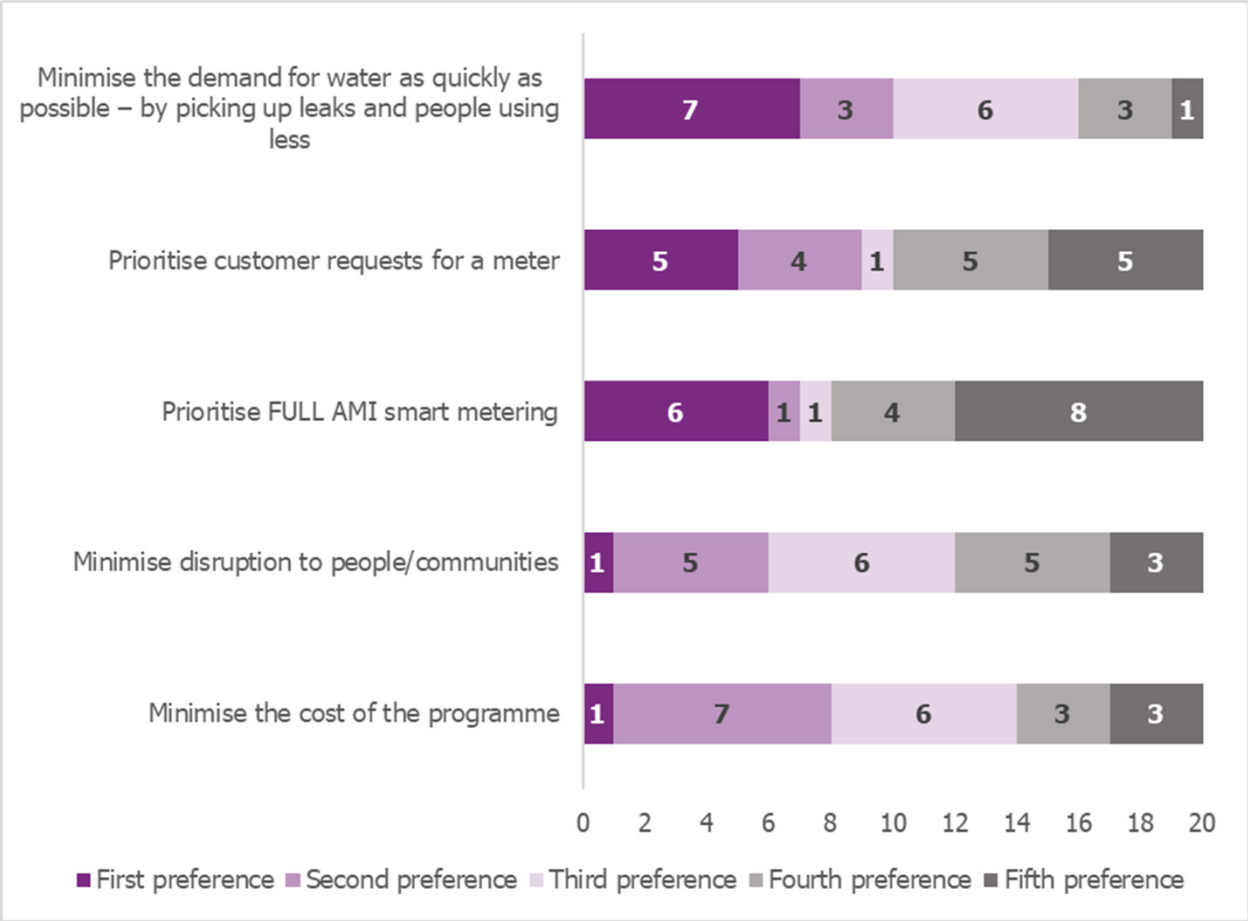
Having watched the video, please rank the options in order of preference – keeping in mind what would be fairest for your own household




**Slightly more participants in SSW region (than Cambridge) place 'minimise the cost of the roll out' as their first preference (even though the ranking of mean scores places it higher in Cambridge)**

# Breakdown of preferences by region - Cambridge

Having watched the video, please rank the options in order of preference – keeping in mind what would be fairest for your own household




**Cambridge participants were twice as likely than SSW participants to select FULL AMI metering as their first preference for the roll out. Higher Socio-Economic grades being somewhat more likely to hold this view. Note that having a smart meter for gas/electricity did not appear to influence views.**

# Reasons behind roll out preferences

**Minimising demand as quickly as possible**

- For many it is simply logical to start in areas where metering will have the most impact
- Supports what participants understand to be the key reason that is driving the consideration for universal metering - the need to reduce demand

*I put that one as number one because if we can reduce the demand for water then we will have a lot more water to go around when it is needed.*
*Ben (future customer)*

**Prioritising customer requests for a meter**

- Customers thought to be more ready to reduce consumption if they actively request a meter
- Point out that these customers are not already on a meter and therefore they will go on to use 10% less water
- Believe that willing recipients of meters are more likely to promote them to others

*I put prioritising customer requests first because these people are ready to start reducing their usage.*
*Selena (billpayer)*

**Minimising the cost of the programme**

- Need to focus on costs now to ensure that bill increases are kept to a minimum. People are already concerned about the rise of energy prices
- Wary of giving SSC a 'carte blanche' on cost. Even those who don't select cost as their key preference do want to know that costs are being considered

*Cost I think is vitally important, has to be sensibly priced otherwise somewhere along the way this added cost would no doubt be passed onto the customer Stephen (billpayer)*

# Reasons behind roll out preferences (cont'd)

**Minimising disruption**

- Most are happy to put up with disruption as they believe the benefits of getting people on meters are worth it
- Disruption is an inevitable part of the change process
- However, it was recognised that disruption may be an issue for the wider community

*I think my answers would of been only slightly different when considering the wider community as I think the wider community would rate disruption to communities a lot higher than I have at the moment. Especially those using limited routes to work etc they may prefer very limited disruption. Shareen (billpayer)*

*I have chosen to prioritise the AMI smart metering, despite the need for further expansion of the infrastructure to enable this system, as to me it seems to fulfil the requirements for the long term future of metering. I believe that the wider community will benefit from this option and it is fair for everyone. Madeleine (SME)*

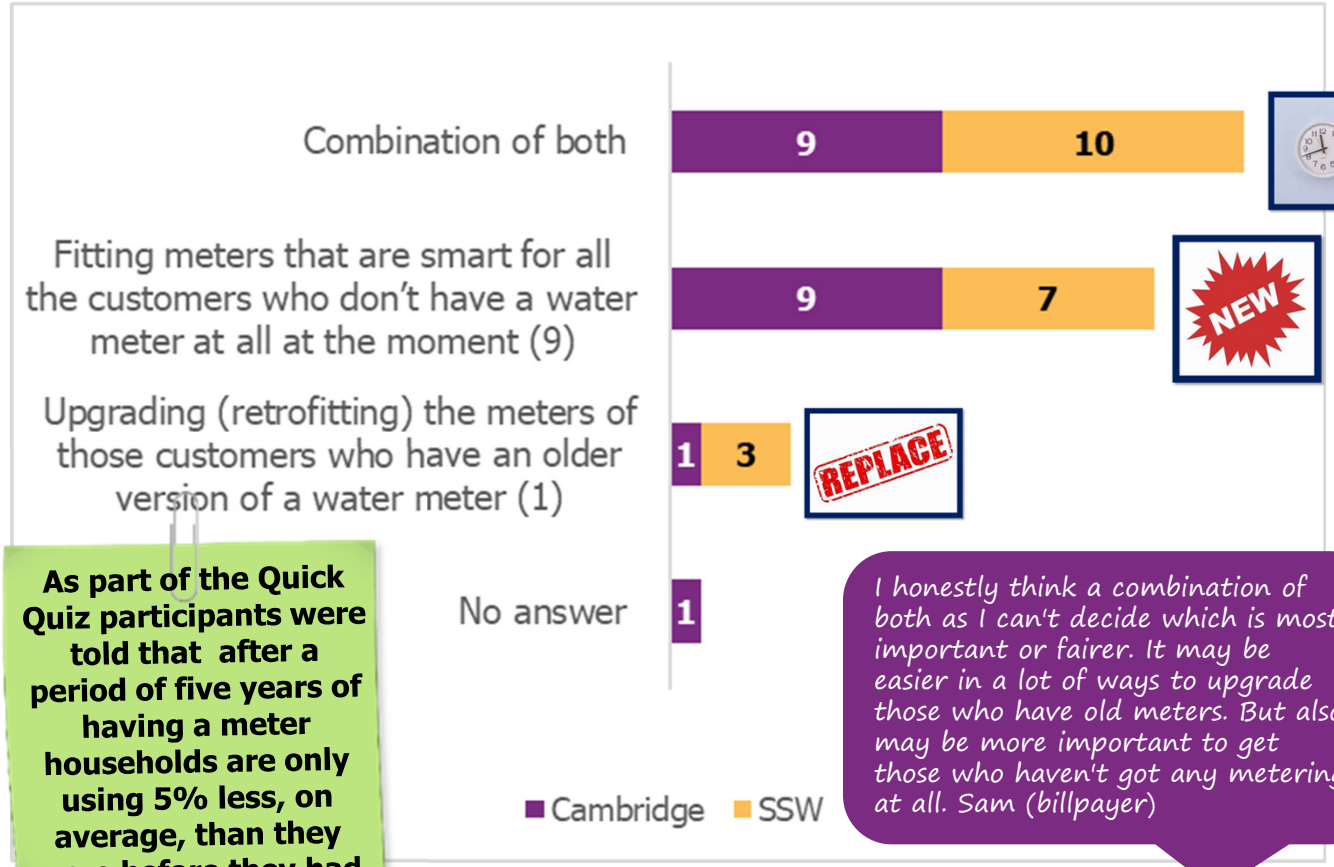
*Frankly, I don't really see the need for everyone to be on the FULL AMI meter, it sounds to me like the "standard" AMR meters would be sufficient for people, that's why I put the FULL AMI meter rollout as the last on my priority list. Anna (billpayer)*

**Prioritising FULL AMI metering**

- Will ultimately reduce disruption as only have to fit the meter once (no need to go back and add an extra piece of kit)
- Makes sense to start implementing the long-term vision for metering straight away
- Welcome more regular/accurate metering readings. Seen as an advantage for those who currently have their meters read less frequently due to access issues
- **BUT** this option divides opinion and some do not see a great need for AMI meters

# Retrofitting is less of a priority but it could be part of a combined approach

The company will need to decide whether to prioritise fitting new meters or replace older meters and wants to know which you think is the fairest approach




**As part of the Quick Quiz participants were told that after a period of five years of having a meter households are only using 5% less, on average, than they were before they had a meter**

*I honestly think a combination of both as I can't decide which is most important or fairer. It may be easier in a lot of ways to upgrade those who have old meters. But also may be more important to get those who haven't got any metering at all. Sam (billpayer)*

Participants find if difficult to make a choice and assess fairness (acknowledge it is difficult to keep everyone happy!). Almost half of all participants (19/40) select a combined approach

Explain that both options are important and retrofit can make a difference by prompting (further) behaviour change (via more regular readings)

Where fitting meters that are smart for customers who don't already have a meter is prioritised, it is because it is believed to be the quickest way of getting all customers on a meter and therefore will have the most significant impact on reducing demand

There was minimal call to focus solely on retrofit as this is seen to have the least impact on reducing demand. This was primarily due to participants believing that households with a water meter already fitted will have already reduced their water usage

# Focus on the replacing the oldest meters first

If Cambridge Water were to go ahead with upgrading of old meters or a combination of upgrading and installing new meters, do you think the priority should be to update the oldest meters first (the ones that are near the end of their lives) or to replace any age of meter as efficiently as possible?

YES

For many it simply made intuitive sense to prioritise replacing the oldest meters first as these were thought to be the ones that would cause problems sooner

**Customers were told that 32% of water meters are over 15 years old and made their own judgements about what this might mean for reliability and accuracy of meter reads**

NOT NECESSARILY

However, some took a more pragmatic approach and wanted the replacement of meters to be carried out in a manner that was most efficient/cost effective for the water company as they saw no immediate issue with older meters

*I think it would be better to upgrade the older meter first, as those with newer meters will have a longer life expectancy left in their existing meters. Stephen (billpayer)*

*Probably the oldest meters as they may not be working as efficiently as they should. Linda (billpayer)*

*I think it would be fair to replace any age meters in the sense that it may be more efficient and cost effective to do all on each street/ area than to do a few here and there. Shareen (billpayer)*

# Broad support for support options but spontaneous concerns about who would be paying

## Support available for any customer

**Ghost meters**
GetWaterFit (and **a tariff** that encourages water saving behaviours, a **price cap** for a set period, proactive advice for managing bill payments)

With the exception of proactive advice, these broader support options have broad appeal with participants

## For those with certain medical conditions

Priority services support, aimed at those with certain medical conditions (WaterSure or price promise)

These beneficiaries were often identified as the most important to focus on but few participants picked up on the details of the support

## For those on low incomes

Financial support, aimed at those on low incomes (Assure Tariff, discount for more water efficient appliances

Majority thought that supporting those on low incomes was the right thing to do. However, there is a core minority who believe this is the role government/ benefits system. Would want to know more about discount on water efficient appliances

# Support for price cap and tariff to incentivise behaviour change

**Price cap**

- Most welcome the idea of a price cap and believe that 25% sounds fair
- There is little appetite for a price cap to stretch beyond 2 years and most cite 1 year as a reasonable timeframe. They believe this is sufficient time for customers to monitor and change their water usage
- Although several suggest that the price cap could be phased out over a period of time to protect against bill shock.
- One or two are against a price cap and suggest that if people wish to have a lower bill they should simply use less water

*I think again 2 years gives people chance to make changes and upgrade things that are using excess water. I think a 25% cap seems reasonable. Jody (billpayer)*

**If a customers' bill is higher when they have a water meter, they would not pay more than an agreed amount of their previous fixed rateable charge for a set period, regardless of how much water they use. For example, if the price cap was set at 25%, if a customer's water bill was £200 a year, they would not pay more than 25% more so, in this case, £250 a year**

**Tariff to incentivise behaviour change**

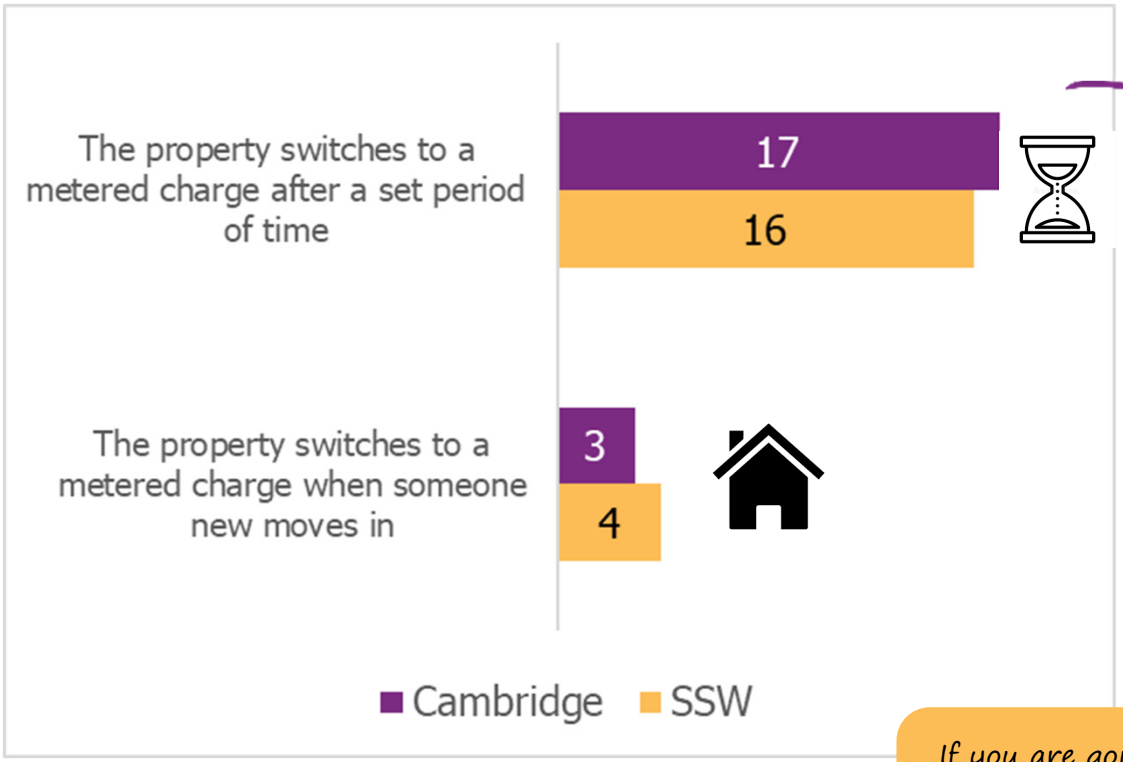
- There is a widespread call for all metered customers to be offered a tariff to incentivise behaviour change
- This is regarded as the fairest approach as well as an opportunity for SCC to further reduce demand amongst metered customers
- Several make further suggestions - pilot it first with those who ask for it before offering it more widely; consider different incentive levels - i.e. to further support vulnerable customers

*This tariff could work and would be a good incentive to customers to save water and money. I think it should be for customers who ask for it initially - maybe as a trial and if successful offer it to all customers. Madeleine (SME)*

As was the case in the first Theme 1 forum. Strong levels of agreement also apparent in CCW's Oct 21 WaterVoice research

# Strong preference for ghost meters to switch to a metered charge after a set period

When thinking about fitting ghost meters, what is your preferred option?




With the majority across the two regions (30/40) believing that this should be within 6-12 months

Waiting until a change of occupancy to switch the meter not favoured:

- Customers may not attempt to change behaviour if they are not planning to move
- Does not communicate the seriousness of the water situation

*If you are going to propose an area wide installation of water meters, why wouldn't you enforce it? Ivan (billpayer)*

# Most want to see a ghost meter switched in a year or less

What is the fairest period before metering charges start for a property?

Cambridge Water

6 months to 1 year
(17 participants)

2-5 years
(3 participants)

*One year: usage over a year I would think follows a fairly predictable pattern, so having a year to watch your usage (with the help of the water company providing graphical analysis, suggestions etc), see when it peaks and make plans would be sufficient. Longer than that and I think it would become too drawn out for most people's attention. Beverley (billpayer)*

*I think 1 year would give people plenty of time to start and be more mindful of their water usage and monitor how they may use it different due to different times of the year. Shareen (billpayer)*

South Staffs Water

6 months to 1 year
(13 participants)

2-5 years
(7 participants)

SSW slightly more in favour of an extended timeline to allow more time for people to change their behaviours

# Mixed views on whether it should be the landlord or tenant who has the final say about switching to metering

The tenant

**Just over half of participants favour the tenant having the final say**

- They are the ones who use the water/pay the bills
- The landlord will get their opportunity to make the decision if/when the tenant vacates the property – but should not force it on a tenant

The landlord

Participants who wish the landlord to have the final say point out that:

- That the decision is naturally theirs as they own the property
- That the landlord should be acting in the best interest of their tenants anyway

**In SSW 11/20 think it should be the tenants' decision and 7/20 think it should be the landlords' decision**
**In Cambs 11/20 think it should be the tenants' decision and 6/20 think it should be the landlord**

It's not that straight-forward

- One or two suggest that it is not so straightforward and will depend on if the landlord is the actual bill payer or not
- One or two others believe that it is not a choice to be made as ghost meters should switch within a set timeframe

# In short, supporting vulnerable customers is widely but not universally favoured

Some of the options, for example, the price promise and discounts for buying water using appliances, would need to be funded by other customers who do not qualify for them. Is it the right thing to do to support customers in vulnerable circumstances in this way when being moved onto a meter?

## YES

The **majority** believe:

- It is the right thing to do
- It is how our society works

*It is the moral and fair reason to support customers in vulnerable circumstances in this way. Dylan (future customer)*

**The need to protect vulnerable customers came out strongly in the Theme 1 research – it is slightly more tempered this wave, perhaps because of more pressure on incomes and because we gave further details of how possible schemes may work**

## NOT SURE

But there is **some concern** about the impact this has on those who can least afford it (i.e. those on low incomes who will not qualify for any assistance)

Potentially a greater willingness to support those with medical conditions than those on lower incomes

A difficult question without knowing the costs involved, particularly given current pressures/price rises

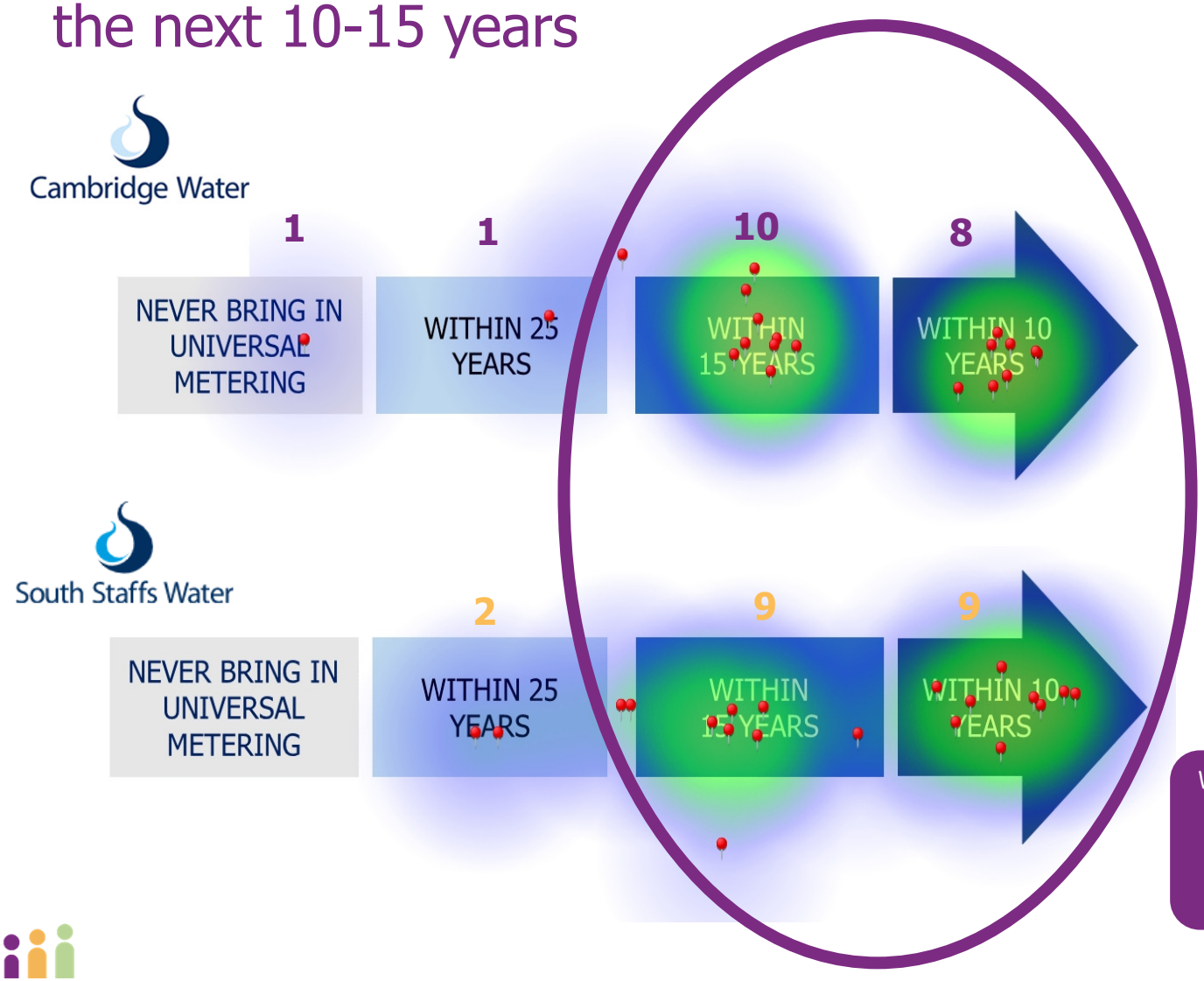
## NO

It is the role of government (via the taxation/benefits system) to support the most vulnerable in society - not customers

Although only based on small numbers, this is a view that appears to be most keenly felt by higher socio-economic grades (and in Cambridge)

*As nice a gesture I don't feel it would be fair that other customers pay. Some paying customers would possibly benefit from these discounts and would never know / qualify or may not want to discuss it out of embarrassment. Luke (billpayer)*

# Majority want to see universal metering implemented in the next 10-15 years




Most believe that 10-15 years is sufficient time for the water company and their customers to make the transition

Those selecting 25 years are most concerned about the cost of implementation if completed sooner

Then lone voice against universal metering believes that personal choice is key

*We are running out of water the problem needs to be managed asap. Barbara (billpayer)*

**The Sept 2021 WRE Club customer research also found that participants preferred a 5-10 year target**

# Most prepared to pay a little bit extra or implement universal metering before 2050

Overall participants were prepared to pay a little bit extra on their bill to achieve an earlier implementation of universal metering

| | Prepared to pay | | |
|---|---|---|---|
| | Cambridge | SSW | Total |
| An extra £4.00 a year (£100 in total) to have universal metering completed by 2035 | 14/20 | 16/20 | 30/40 |
| An extra £3.50 a year (£87.50 in total) to have universal metering completed by 2040 | 15/20 | 17/20 | 32/40 |
| An extra £2.50 a year (£62.50 in total) to have universal metering completed by 2050 | 19/20 | 17/20 | 36/40 |

**There is a willingness to accept a small bill increase to have universal metering completed ahead of 2050. But several participants who wished to see it implemented in the next 10-15 years were not prepared to pay**

**A future bill payer pointed out that it was difficult to answer this question when not the billpayer – 3 of the 6 opted to pay the highest amount**

# There is no consensus on whether to meter the 2% of households where meters are difficult to fit

Half are in favour and half are against metering this remaining 2%

Slightly more likely to live in SSW

**Those that support the move are generally willing to contribute towards the costs – although warn that there is a limit to how much this would be**

**In favour**

It is the fairest way – universal metering means universal metering

EVERYONE should have opportunity to pay for what they use. Assessed charges may not benefit all

Would rather pay now, than have to potentially pay for it later

*Yes I think a small increase is justified - we all have to expect some increase in costs in any case and even more so if we are to prepare for changes to combat climate change. Paul (billpayer)*

**Against**

The potential reduction in demand to be gained from the remaining 2% seems unlikely to justify the expense

Assessed charges seems fair – although acknowledge that there will be winners and losers

Only willing to accept a certain number of bill increases….

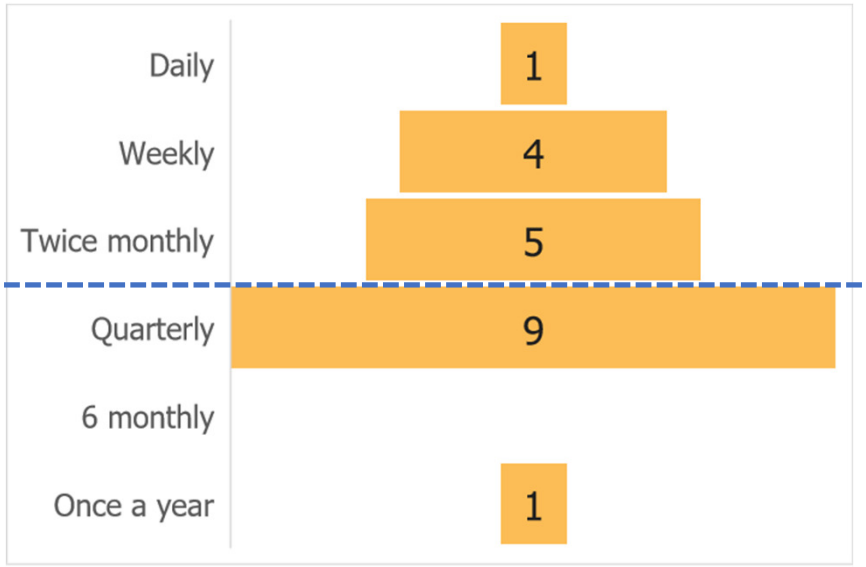
*I don't think it is fair that all customers should pay to cover the cost of the meters. As the access to some of these properties is not straightforward I believe they should be left as they are until all the smart meters are installed and then see whether there is funding available to complete the metering of these properties. Madeleine (SME)*

Slightly more likely to live in Cambridge

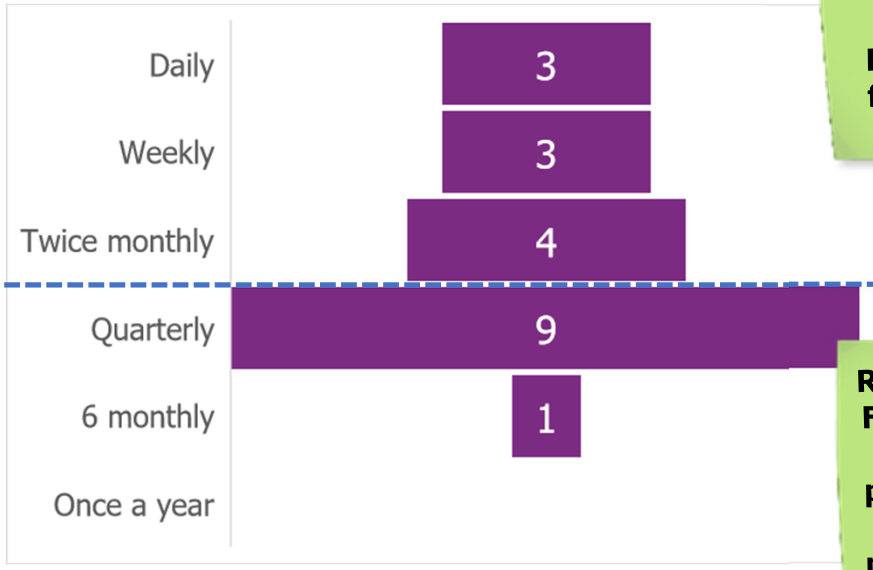
**Those that don't support moving these customers onto meters also do not believe that it is fair to be asked to pay for the move (given they perceive little benefit)**

# Only half of participants want more detailed information more than quarterly

How frequently would you prefer to receive detailed information on your water use an your home or business?




South Staffs Water




Cambridge Water

**Amongst our 8 SMEs**

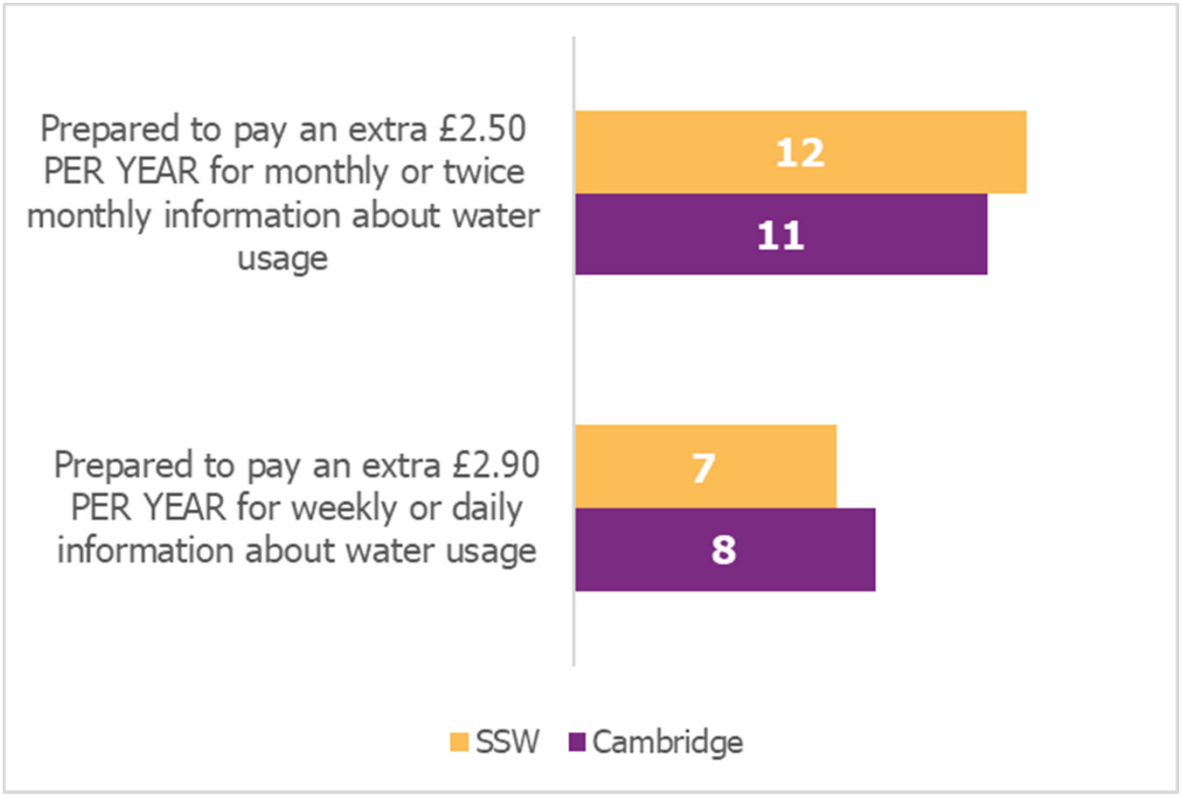
**4 Quarterly**
**1 x 6 monthly**
**2 x Twice monthly**
**1 x weekly**

**Does not really differ from the wider trend**

**Reflects why prioritising FULL AMI metering was generally not the preferred option for the roll out of universal metering - Participants do not appear to perceive more frequent information to be of great value**

# Slightly more than half are prepared to pay for more frequent meter reads

Would you be prepared to pay…….




Just over half of participants are prepared to pay extra to receive information monthly or twice monthly

There is less of an appetite to pay extra for weekly or daily information, again suggesting that the benefit of more frequent information does not necessarily resonate with customers

However, more participants were prepared to pay for more frequent information than initially wanted it

# Differences between key groups

## Regional differences

South Staffs Water | Cambridge Water

- Cambridge customers more likely to prioritise FULL AMI as roll out option than SSW
- Cambridge customers appear slightly more determined to hold out against any bill increases than SSW customers (including support for vulnerable customers)

## SMEs vs Households


- Few discernable differences in their views of universal metering

## Future vs current bill payers


- Future customers slightly more likely to prioritise AMI metering than current customers

## Demographics

- Higher socio-economic grades more reluctant to support vulnerable customers through increased water bills

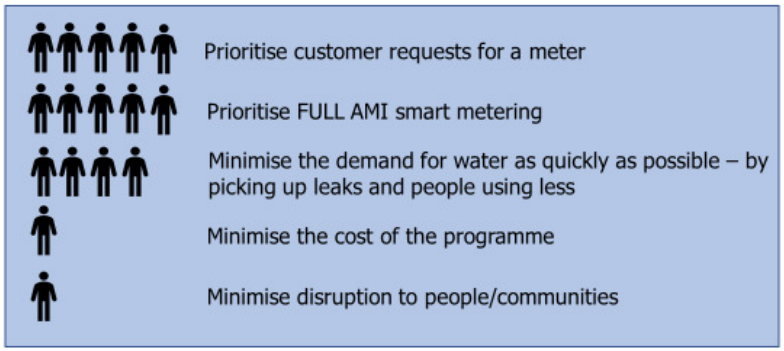
There are few differences between audiences because the level of support for universal metering is so high across the board – those stated are **based on very small differences**

*I don't agree with this being funded by water bills of other customers. Speaking as a single person household, I feel I am already penalised by the amount I pay for other taxes such as council tax and income tax for services I don't even use. Paul (billpayer)*

# Participants generally accepting of emerging findings: Cambridge

Before the end of the forum, participants were given a summary of findings (see below) based on 16 completed responses and asked for their thoughts.

**Different ideas about how to approach the roll out of universal metering**




Based on 16

Most wanted Cambridge Water to fit new meters (7 people) or upgrade and fit new meters at the same time (7 people) if rolling out universal metering. Only 1 saw upgrading as the priority

9 out of 16 were happy to receive bills ever quarter or every 6 months. But half (8) were prepared to pay an extra £2.90 a year for more frequent meter reads (weekly/daily)

**Most wish to see universal metering rolled out in the next 10-15 years**


Most (13 out of 16) were prepared to pay an extra £4.00 a year (or £100 in total) to have universal metering completed by 2035

- Most were unsurprised about the summary of findings for universal metering
  - Reflecting that there was much agreement about the need for universal metering and the desired timeframe for implementation.
- However, the following points caused some surprise:
  - That some participants were prepared to pay extra for more frequent meter reads
  - That minimising the cost of the programme and minimising disruption to people/ communities was not a top priority for more people - although others were happy to interpret this as participants placing environment first

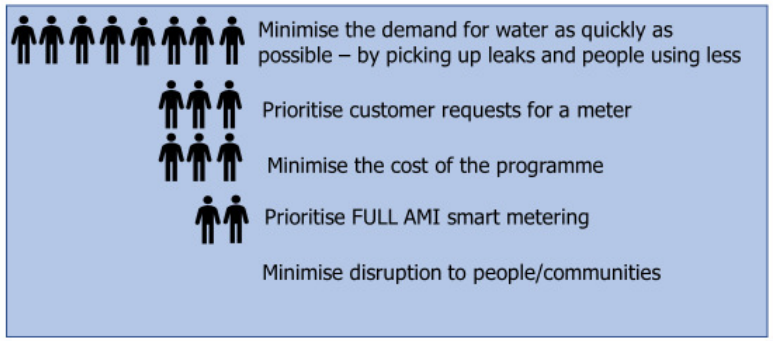
*I am surprised that half of those responses would pay extra to have access to more frequent meter reads, why would anyone need to know how much water their household uses weekly or daily. Barbara (billpayer)*

*I agree with the majority of answers but I am a bit alarmed as to the disruption to communities being so far down the list, I for one am sick of the constant roadworks in Cambridge it has been absolutely awful, mostly road improvements but even so. I would like smart metering to be standard within 10 years 15 seems ages away. Shanif (billpayer)*

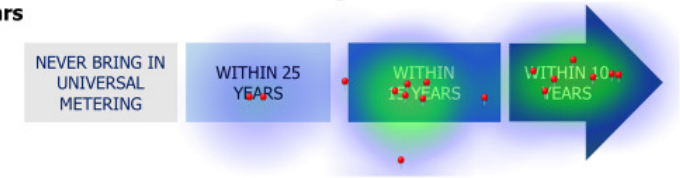
# Participants generally accepting of emerging findings: SSW

Before the end of the forum, participants were given a summary of findings (see below) based on 16 completed responses and asked for their thoughts.

**Different ideas about how to approach the roll out of universal metering**




**Most wish to see universal metering rolled out in the next 10-15 years**




Most wanted South Staffs Water to fit new meters at the same time as upgrading old ones (9/16 people) if rolling out universal metering. Whilst 4 saw fitting new meters as the priority and 3 people regarded upgrading old meters as the priority

8 out of 16 were happy to receive bills every quarter or every 6 months. That said 11 people were prepared to pay an extra £2.90 a year for more frequent meter reads (weekly/daily)

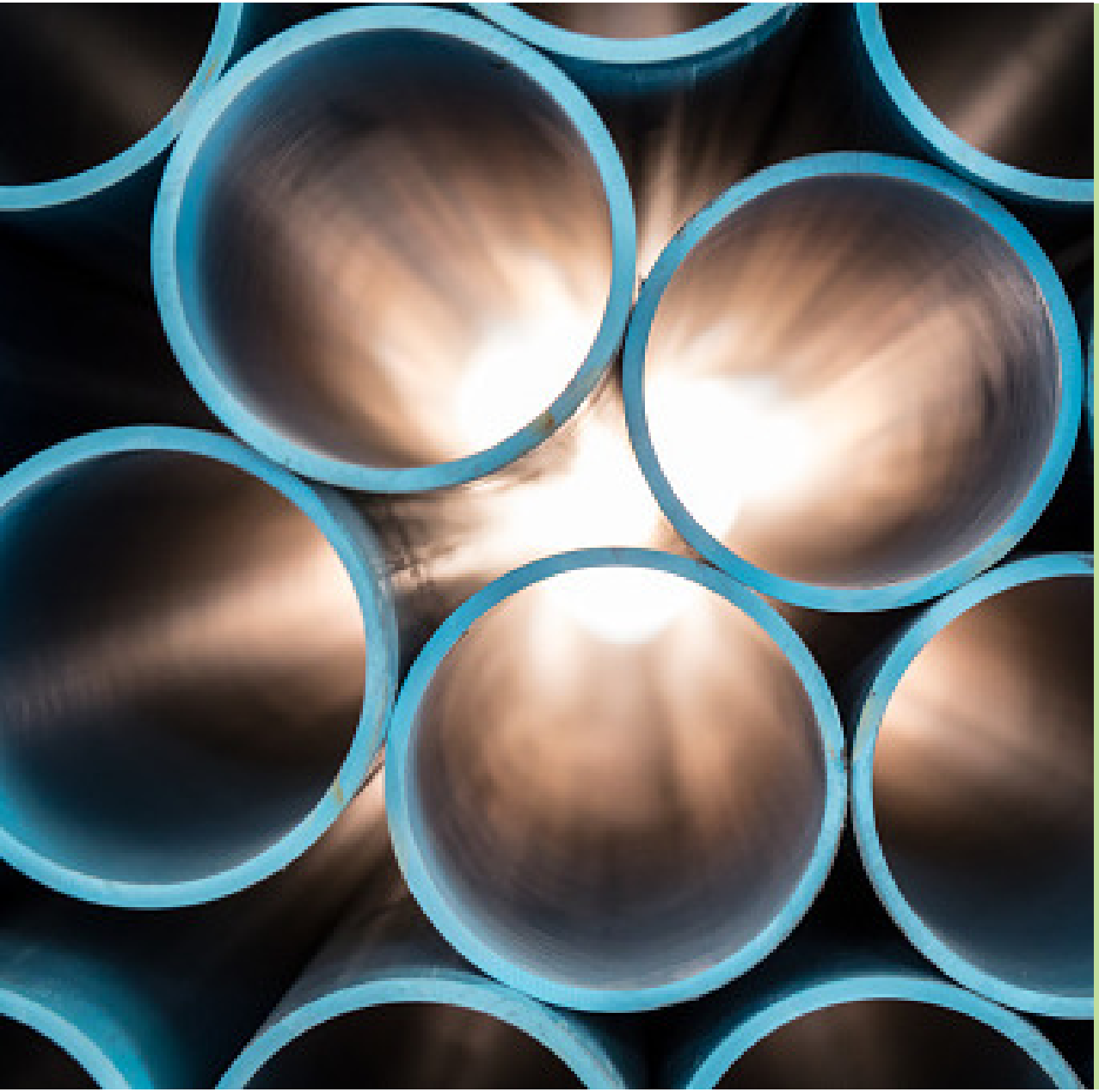
Most (13 out of 16) were prepared to pay an extra £4.00 a year (or £100 in total) to have universal metering completed by 2035

- There was even less surprise about emerging findings amongst SSW participants
  - Genuinely seemed more accepting of disruption/roadworks as an annoying part of daily life
  - Although again, several questioned why some were happy to pay for weekly/daily meter reads (as they themselves perceived little value)

*Nothing really surprises me here – its pretty in line with my views and thought process. I am surprised that people would want to pay more to access weekly/daily meter reads, me personally just thinks that's too much on top of all the other life admin need to think about Christian (SME)*

*I am not surprised by the information above, I am not concerned that minimising disruption was the lowest on the priority as to improve the water usage this will have to be done if we want to improve the water situation as quickly as possible. I think as a community we will be able to see that this is of great importance and benefit to us. Shareen (billpayer)*

**Remember in the initial Quick Quiz on metering 12/20 participants in both regions could not recall frequency of meter reads**



Views on water transfers

# Water transfers

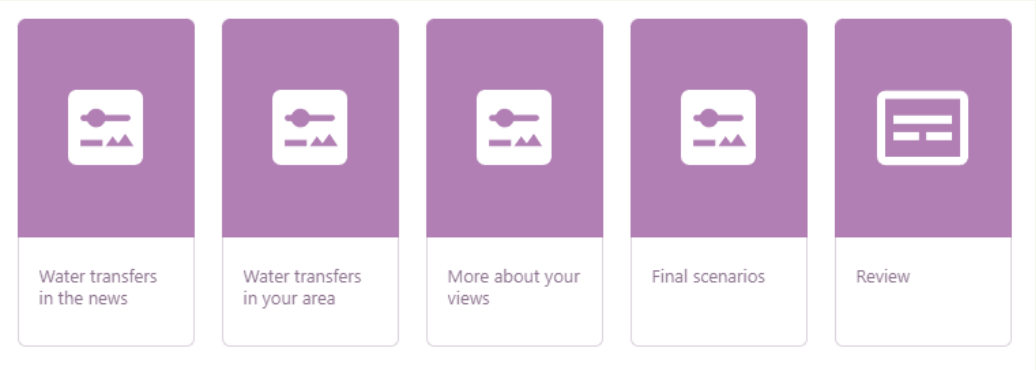
**Context**

- Water transfers could potentially help address supply issues. With Water Resources East considering possible water transfers to Cambridge Water namely Anglian Water and South Staffs Water from other water companies in the West region, namely United Utilities.

**Objectives**

- Understand customers' spontaneous views of water transfers. Explore views of the concept in principle. What, if any, concerns do they have?
- Understand customers reactions to possible water transfers in their region once informed.
- Establish what customers see as the principles that should underpin water transfers.
- Explore perceptions of who should pay for water transfers.

**Process / approach**




Gather spontaneous views on water transfers prompted by a BBC news story

Share information and gauge opinion on local water transfers proposed for each region. Ask for views on supporting principles

Explore how opinions might change depending on different vantage points/ a range of scenarios

Review and comment on what others have written

# Key takeouts

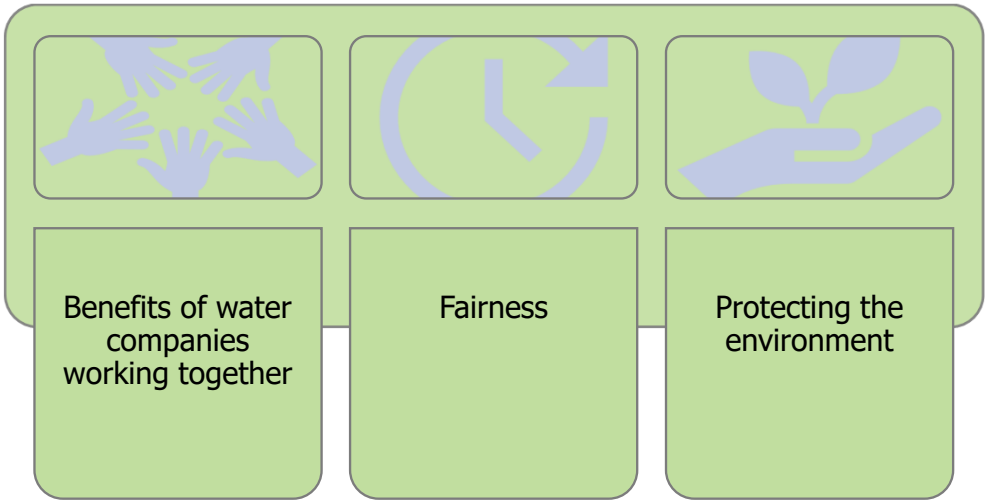
**Generally supported but concerns and questions raised immediately**

**Reliability of supply and service levels of the company receiving the transfer are key conditions**

**The implications for the environment prompts much discussion**

**Willingness to pay more <u>but</u> only if foresee some benefit**

## Key themes when thinking about water transfers




*I agree water transfers will become needed in the future due to increasing pressures on water demand and possible changing weathers. Resources may need to be shared between communities, which should be done in a fair way, so long as not to disrupt the environment too much or cost customers too much more. Although I still feel the overarching push should be towards reducing demand on water overall, by educating users and recycling where possible. Abbie (billpayer)*

# Behind the headlines

**Surprises / learning:**

Participants in Cambridge seemed surprised to find out just how reliant their area might be on water transfers in the future.

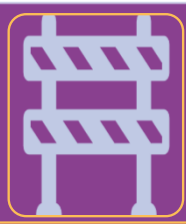
$CO^2$ emissions linked to water transfers provokes strong reactions

**Thoughts / justifications**

Participants understand that water is in short supply and whilst most advocate for reduced demand they are accepting of supply side options

Participants see water transfers as a binding agreement between two parties that should not be entered into lightly and expect all eventualities to be taken into account before any agreement is made

Participants do not want their region to become over dependent on water transfers



**Caveats / limitations**

Give reassurance about environmental impact of water transfers

Position water transfers as one of a number of supply/demand solutions

Consider fairness of approach and how to communicate potential benefits of water transfers to customers living in donor areas

# The idea of using water transfers was generally supported but concerns come to the fore quickly

Participants were introduced to the concept of water transfers and shown a BBC news clip from 2012 highlighting a water transfer involving Severn Trent and Anglian Water. They were then asked 'Generally, what do you think of this idea of using water transfers to provide more supply?'

## A good idea

Believe that water should be shared in times of need – it is the right thing to do

Do not necessarily believe water is owned by a water company (just the supply network)

Recognise that some areas are 'wetter' than others

*I think all the water belongs to everyone and I think if areas are in need of water I definitely think everyone who can should help out. I don't agree with water 'belonging' to only certain areas and it having to stay in those areas. However I do agree that it is important for all water companies to be self sufficient, and water transfer should be a last call. Eden (future customer)*

## But not necessarily seen as a long term solution

Water companies still need to aim for self-sufficiency

Concerns about becoming over reliant on another water region

Concerns that water transfers will not be sufficient for a growing population

Concerns about the environmental impact

*Companies may see it as a way of not investing in their own long-term water storage plans by relying on other companies to 'bail them out' as a regular occurrence. Steven (billpayer)*

**The Sept 2021 WRE Club customer engagement also found that transfers make intuitive sense but identified concerns that they are:**

- **Expensive**
- **Energy intensive**
- **Not a long term solution**

*I think water sharing should be a last resort and things like hose pipe bans should be implemented before water sharing. Emma (SME)*

# Participants have many questions relating to the impact of and context for water transfers

Based on the BBC news clip participants were then asked what they would want to know about the scheme (from both the donor and recipient perspective)

## The area making the transfer

**Impact**

How will it affect my water supply and the supply to my wider community both now and in the future?
Will the security of my water supply be prioritised over the area receiving the water?
Would I/my community have to reduce usage?
Will it impact my bill?
What is the impact on the environment in my area?

**Context**

How much water does this transfer involve? Will it meet demand?
How was it decided that my region had enough to share?
Is this a short term or long term solution?
Why is this transfer necessary?
What else is the recipient area doing to ensure that their demand for water is met?
Will it make a profit and who will benefit from that?

## The area receiving the transfer

**Impact**

Will I have to pay for this?
How environmentally friendly is water transfer?
Will the water I receive be of the same quality/taste/hardness?
Will my water use be restricted?

**Context**

Why are we in this situation?
Is this a short term or long term solution?
Is this the best solution for wider society or just my area?
What other solutions is my water company looking at?
Is this (or will it be in the future) a reciprocal arrangement?

**Similar concerns/ questions were identified in WRSE's 2021 research on long term water research planning**

WRSE research March21

# Reactions to local transfers: Cambridge

Cambridge Water

community research

## Information that prompts negative perceptions

Concerned about some of the issues highlighted:

- Changes to taste of the water
- Transfer of non-native species
- Carbon emissions

Number of transfers being considered causes concern that Cambridge will become over reliant on other companies

Some concern that there has not been better planning to avoid this situation e.g. the building of reservoirs (large or small)

Had not realised that they would have to pay towards the transfer


**Views about water transfers to do not change substantially upon hearing about local context. However, environmental concerns have become cemented and the number of proposed transfers has made some Cambridge participants feel vulnerable**

## Information that prompts positive perceptions

Appears to be a more sustainable option than previously thought e.g. involves canals and reservoirs

Could prevent the need for a large reservoir needing to be built in Cambridge region – an advantage not previously aware of

The possibility of receiving softer water

Finding out that water transfers are not for profit. Although this point is not picked up on by all.

# In their own words

I am even more convinced that water transfers are an unacceptable way of dealing with water shortages. Particularly the CO2 emissions and ecological impact of water transfers are something that is to be avoided at all cost. Anna (billpayer)

I think my view is still very much the same as before that transfers shouldn't be relied on from other suppliers. One big concern I now have is that Cambridge water are looking at possible transfer from a number of suppliers as a long-term solution, is this because Cambridge water have not managed water stock well or not invested in being able to store larger quantities of water? What would Cambridge Water do if these companies stopped transferring water to Cambridge as they needed it for there own customers? Steven (billpayer)

My views have changed slightly. I am pleased that water transfers are not used as an opportunity for profit by the water companies. I also hadn't realised the term 'water transfer' included things like building reservoirs and using canals. I think the fact they would be more long term solutions than I had anticipated has made me much more favourable to them. Sam (billpayer)

I hadn't computed that the actual nature of the water would change by having it transferred in rather than all coming from the same place. My first thought was 'less limescale, yay!', but thinking more, I would be less enthusiastic because the taste of local drinking water is actually quite a big thing for me personally in feeling secure and comfortable at home. Just something I hadn't realised before. My views haven't changed much, I still think water transfers sound like something that need to be minimised. However, now knowing the extent to which they are already in use and are being planned for the future, it sounds like they are something of a necessary evil. I still think they should be used in tandem with a plan to reduce individual and business consumption but my understanding is that the rise in demand from more people moving to the area is what means the current solution won't provide enough water going forward. Beverley (billpayer)

# Reactions to local transfers: SSW

South Staffs Water

community research

My view hasn't changed much I think it's a great idea for when certain areas are struggling but I definitely still agree that it should but a last resort as I've found out that transferring water is likely to produce higher level of carbon emissions. Eden (future customer)

SSW participants remain broadly positive to towards water transfers after hearing about local plans

For some, it was the first time they had thought about the environmental impact


There was some surprise that those transferring water may have to pay towards it

I am more concerned in regards to the environmental impact on species and plants, also the affect of emissions. I think taste of water is something people would notice but get used to, as we do whenever travelling to different parts of the country. This doesn't seem like something that should put us off using more effective ways of providing and being provided with water in times of drought and shortages. Shareen (billpayer)

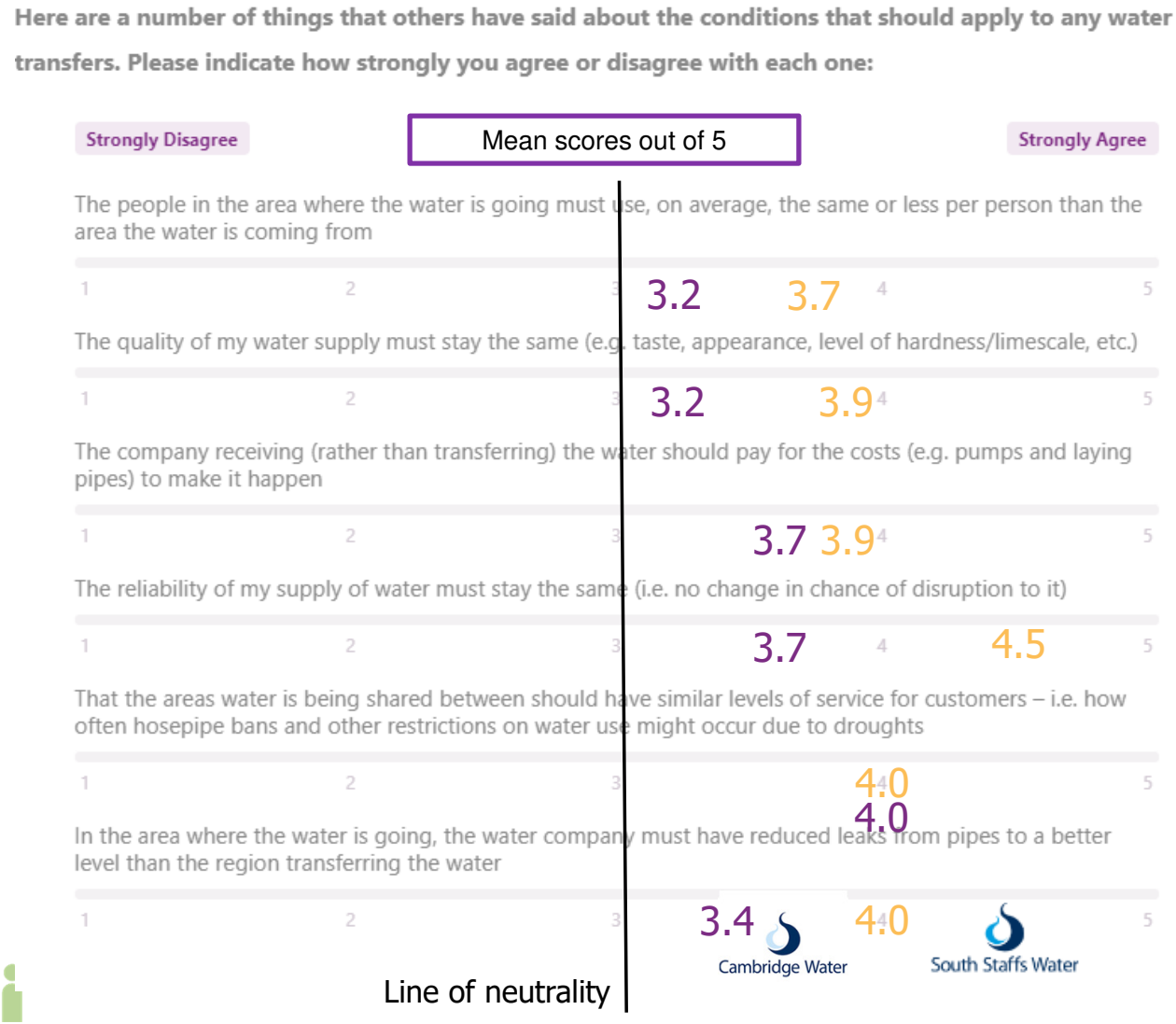
It surprised me that potentially the customers of the water transfer company may pay towards this. Asma (billpayer)

# Participants spontaneously identify conditions for water transfers

What would companies need to put in place to ensure that you are happy with the idea of any water transfers in future?

- Minimising environmental impacts for both parties
- Having a long term vision for investing in own water supply
- Ensuring customer water supply is not disrupted
- Using renewable energy wherever possible/minimise carbon emissions
- Sharing cost breakdown (in bill)
- Prioritising transfers from the nearest water source
- Ensuring all other means of increasing supply/reducing demand are being utilised
- Using most cost effective transfer
- Ensuring areas receiving water have hit leakage targets
- Ensuring there is not a huge disparity in cost of water between the regions involved
- That it is a fair deal for all parties
- That quality of water will remain the same

# Prompted consideration of conditions for water transfers




*I considered the supply of water to be the first priority. Once we have supply the next would be quality and then taste or appearances. In regard to the costs involved, I feel it should be a shared cost. Luke (billpayer)*

Cambridge participants tend not to agree as strongly with the conditions that should apply to water transfers, perhaps because they sense that they may become reliant upon them?

Cambridge participants appear less attached to the quality of their water supply, potentially due to hardness?

*I think the main considerations is that the process is fair, as we wouldn't be happy paying to send water to a region which is careless with water usage or not imposing bans to try and help their own situation. Shareen (billpayer)*

# Looking at water transfers from different perspectives…

Most believe that they have taken a holistic view of water transfers and therefore their **views would not change significantly if they were the donor or recipient**

Although, some state they might take more cost conscious approach if they were considering water transfer solely from the perspective of a recipient of a transfer

Others think they might seek even greater reassurance about their own water supply if they were answering solely from a donor perspective

*At the receiving end, I am more interested in what my water company is doing to avoid this option where possible, whilst at the delivery end I would be more interested in what happens with the revenue generated and confirmation that my long term supply would not be impacted. David (billpayer)*

Again the **size of the transfer and where it was coming does not substantially alter how participants feel** about water transfers

Some, particularly in Cambridge, had already expressed concern about becoming over reliant on water transfers and wished companies to invest in their own supplies rather than transfer large amounts.

Participants had also previously expressed a preference for water transfers to be as local as possible (to minimise environmental impact)

*I think I would start to query if one region was continually receiving large amounts of water as it would seem they were not being proactive in containing leaks etc with their own supply. Stephen (billpayer)*

Participants expressed **most emotion about changes to the appearance/ taste/smell of their water.** Some felt that any significant change would result in them taking a more negative view of water transfers.

Although they also suggested way to address the issue:

- Forewarning customers about the change would make it more acceptable
- If changed happened once (rather the numerous times due to different transfers) it would be more acceptable

Others were more pragmatic and highlighted that a change of taste/smell/ appearance was better than no water!

# Looking at water transfers from different perspectives (cont'd)…

How would you feel about…….

Water being moved from one area to another to protect the environment e.g., move water from region A to region B to protect the water environment from being damaged in area B?

Most are in favour of water transfers for **environmental reasons** (if region A suffers no detrimental environmental impact as a result)

However, some question the viability of this as a long term strategy and others want further information on the possible adverse environmental impacts of water transfers in terms of carbon

*As a short term interim measure, as part of a plan to become more self-sufficient and with a comprehensive assessment of the impacts, this would be ok, assuming that it's not going to cause other environmental problems in Region A of course. Beverley (billpayer)*

*I think that's a great idea protecting the environment is extremely important for including our future water usage if moving water to protect the environment is needed then I think it's important that it happens. Eden (future customer)*

Customers being asked to reduce the amount of water being used for non-essential activities (like washing cars, using hosepipes) so there is more that can be transferred to another region so that region can avoid having to bring in more severe water use restrictions (like a hose pipe ban)?

Most are supportive of this – the idea of collective action resonates and some have already indicated that they would be happy with further restrictions on non-essential activities. However, there are a number of important caveats:

- The receiving region would need to be in severe need and to be able to demonstrate that this is not the result of mismanagement
- The restrictions would be temporary
- Customers in the receiving region would also need to restrict use
- The rationale is clearly explained to customers

*No problem from me – we must do what is required. I would only get annoyed if I thought it was as a result of neglect and misuse that water was in short supply. Annmaria (SME)*

*I think I have alluded to earlier car washing, watering lawns should not be priorities and if that meant that a region would have to have this enforced to enable another region to increase water stocks then that is a yes from me. Stephen (billpayer)*

# Mixed views on whether there are times when water sharing shouldn't happen

Are there any times when water sharing shouldn't happen? In periods of drought, should an area be able to stop sharing water with another e.g., to avoid a hosepipe ban in their area, or avoid increased amounts of water being taken from rivers and other water sources in their area?

**YES**

Most participants would want to an area to stop water sharing if it was causing damage to the environment in that area

Also, if there was a severe drought (not defined by temporary usage bans) then it was acceptable to some but not all for an area to stop sharing

*There's nothing wrong with a hosepipe ban as that's not essential usage in my opinion but if it's going to adversely affect the environment then no we shouldn't be sharing. Marie (billpayer)*

**NO**

However, it was not acceptable to most for an area to stop sharing water simply to avoid having to impose a hosepipe ban.

They were concerned that areas, which had become reliant on the transfer would suffer greater detriment as a result

*No the sharing- if implemented- should always be an option, however maybe the amount of water shared could be reduced. Aleksi (future customer)*

**NOT SURE**

Many acknowledge that it was a tricky question but also that the companies going into a water transfer agreement would have made a binding commitment, taking these factors into consideration

**There is a general sense in Cambridge, more so than in SSW, that water transfers are an agreement between two parties – in good times and bad.**

# Most happy to pay more for water transfers, but only if foresee some benefit to them

The cost of installing the pipes and pumping stations and/or modifying canals that would be required to get the surplus water to other regions is likely to be fairly high. We'd like your thoughts on who should pay for these investments.

Yes happy to pay

**Most participants felt that this was appropriate** – it is fairer and sharing the costs widely will reduce the costs for individual customers. Having the infrastructure is likely to benefit the region in future either from the ability to receive transfers or revenue. However, there was a call for:

- Transparency in terms of what is happening and why
- Value for money – oversight of contractors & costs kept to a minimum

Yes as long as I understood what this was happening and the cost was divided equally between all parties than yes investment is important for long term plans. Joel (billpayer)

No – not happy to contribute

A small minority were not happy to pay:

- One strongly objected in principle to water transfers on environmental grounds
- Some felt that national or regional schemes should be paid for nationally by the Government
- Utility costs are high already and some are already struggling

I'm not sure I would be happy to pay more if my region didn't require any water, I feel we should all help each other out across the country but if we do not require any of the water I would struggle to feel happy about paying more. Shareen (billpayer)

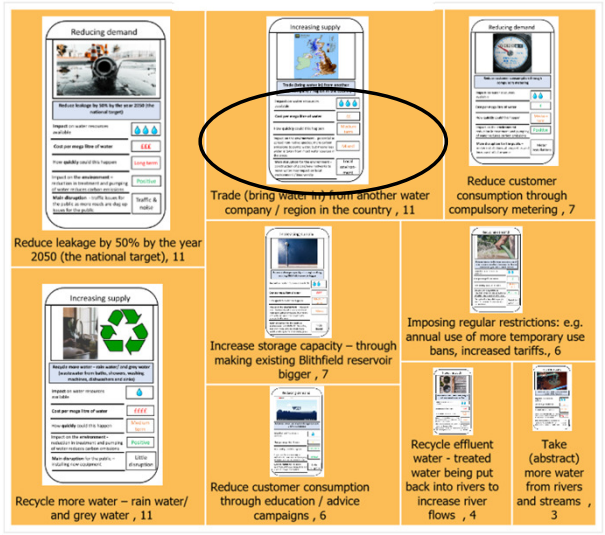
When asked if they would be happy to pay if their company doesn't receive water, most ruled out paying more. Those who were happy to pay more did so as long as it was a small amount and it was in anticipation of future benefit to them or the region (i.e. environmental, revenue, water supply). A small number distinguished between paying for the infrastructure and paying for the transfers themselves.

# There were few differences by audience – but some were apparent at regional level

Cambridge participants were less likely to select water transfers than SSW participants in the first forum. They tended to prioritise demand management, recycling and leakage.

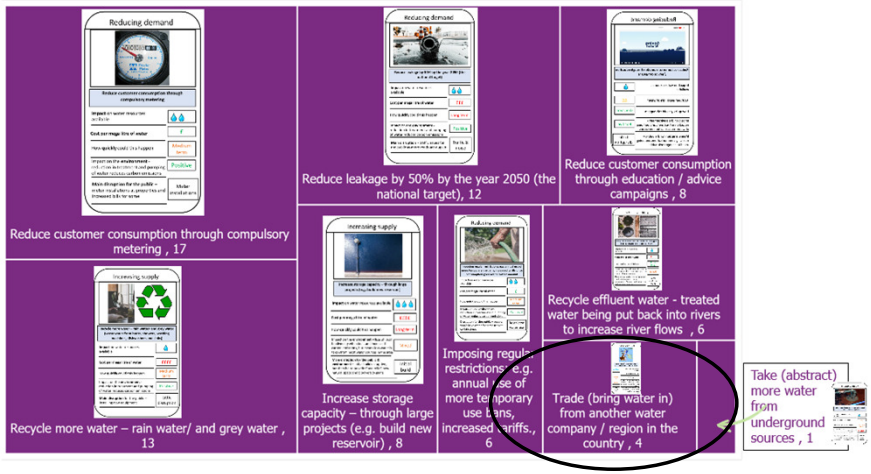
Spontaneous concerns about the environment were much more evident when the concept of water transfers was raised in this forum

South Staffs Water




Top Trumps selection in first forum – number of times placed in top 3

Cambridge Water




However, as the Deep Dive forum went on there was a greater sense amongst Cambridge participants that they will become reliant on transfers and some increased levels of acceptance. There were markedly lower levels of agreement with various conditions associated with transfers than for SSW participants.

*No, I think I've thought about the issue fairly holistically, looking at the situation on a large scale. Though I might have been less interested in considering the matter if my area wasn't looking like it's going to be needing transfers so much! Beverley (billpayer)*

# Participants in both regions generally agree with emerging findings

Participants were show the emerging findings (based on responses from 16 participants) on the **Prompted consideration of conditions for water transfers**

- Whilst most did not see anything surprising in the findings, a number of participants in both regions were somewhat surprised that **The quality of my water supply must stay the same (e.g. taste, appearance, level of hardness/limescale, etc.)** was not seen as more of a priority.

*The one that surprises me the most is the quality of water being so far down on the list, i would have thought that would be something quite important for people. Asma (billpayer)*

*.I pretty much agree with all of these, i would possibly like to see water quality mainly for the reason of taste score higher in importance but apart from that nothing surprises or concerns me Steven (billpayer)*

*I would have thought more people would be ore concerned about the quality of water they're receiving especially if they're paying more to be able to receive it. (future customer)*

*Although I agree with where the taste of water sits on the chart I did think that many other people would of rated this higher. But it goes to show that many people are willing to put the needs of bettering the water levels provided above this. Shareen (billpayer)*

# Summing up

# In summary


## Universal metering

- There is widespread support for universal metering to go ahead at speed, with many willing to pay more to have a universal metering programme delivered ahead of 2050. Participants are reassured that vulnerable customers will be supported through the transition.


## Water transfers

- Most accept that water transfers are necessary but there is less enthusiasm for them as a long term solution (in comparison to universal metering).
- Concerns relating to the environment, quality of water, cost will need to be clearly addressed and the context for transfers explained.

# In participants' own words

I think it's vital that you go ahead with universal metering this will help people think twice about how much water they are spending but also helps reduce the usage which in hand will help the overall goal. Most businesses are using this now and it makes a massive difference around helping the planet and doing the right thing.

I would definitely support the use of water transfers as this will help with plans across different water companies and also help with supply of water, we need to understand why some companies are doing better than others at this method and adopt ideas so that these can be implemented for future plans. Key consideration needs to be that the payments should be split equally between all parties as this process makes it fair for the paying customers but also the water companies themselves. Joel (billpayer)

I think that they should implement universal metering as soon as possible. Hopefully the new updated meters will detect leaks more efficiently thus saving water. As to the disruption this will cause I think that people would be supportive if the reason for the work is communicated effectively.

I would support the use of water transfers if it was used when absolutely necessary i.e., a drought in an area. When planning the best method to use, thought must be given to any detrimental on effect on wild life. Mary (SME)

I'm fully in favour of universal metering as it's fairer for all and the best way to make people think about and cut back their water usage.

I'm broadly in favour of water transfers as long as it's done over the shortest distance possible, the energy used is as green as possible and the receiving area meets the cost of infrastructure and supply.
Marie (billpayer)

# Stakeholder Roundtables

# Introduction to Stakeholder Roundtables

SSC is now undertaking a comprehensive engagement programme to support the development of the draft WRMP24 in each supply region in order to demonstrate that customers' and stakeholder views and feedback have been sought and helped to shape the draft plans and investment decisions.

South Staffs Water

Held on 11th October and attended by:

Citizens Advice Sandwell & Walsall
CLA (Country Land and Business Association)
Lichfield District Council
Food and Drink Federation
Natural England
Sandwell Crossroads Care for Carers
Sandwell Metropolitan Borough Council
Waterwise

**Sessions ran for 3 hours and were held on Zoom. A combination of presentations in plenary and smaller group discussions**

Cambridge Water

Held on 13th October and attended by:

Cam Valley Forum (2 attendees)
Everflow Water
Friends of Cherry Hinton Brook
Friends of the Cam
Greater Cambridge Planning
Middle Level Commissioners
MP for Cambridge City
Natural Cambridgeshire
Natural England (2 attendees)
River Mel Restoration Group
Sanctuary
University of Cambridge
University of Cambridge (North West Cambridge Development)
Wilbraham River Protection Society
Wildlife Trust BCN

**Although a wide range of organisations were invited, the roundtables did not have a completely representative mix of organisations**

**All breakout sessions moderated by Community Research and attended by members of the WRMP team**

# Quick recap of findings from Stakeholder Roundtables

## SSW - 8 attendees (with a bias towards support organisations)

- While recognising the value of **universal metering** for demand management, stakeholders raised serious concerns about bill increases, particularly now, alongside increases in food and energy bills. If South Staffs Water decides to introduce it, there was a call for the company to consider timing and take great care to protect affordability.

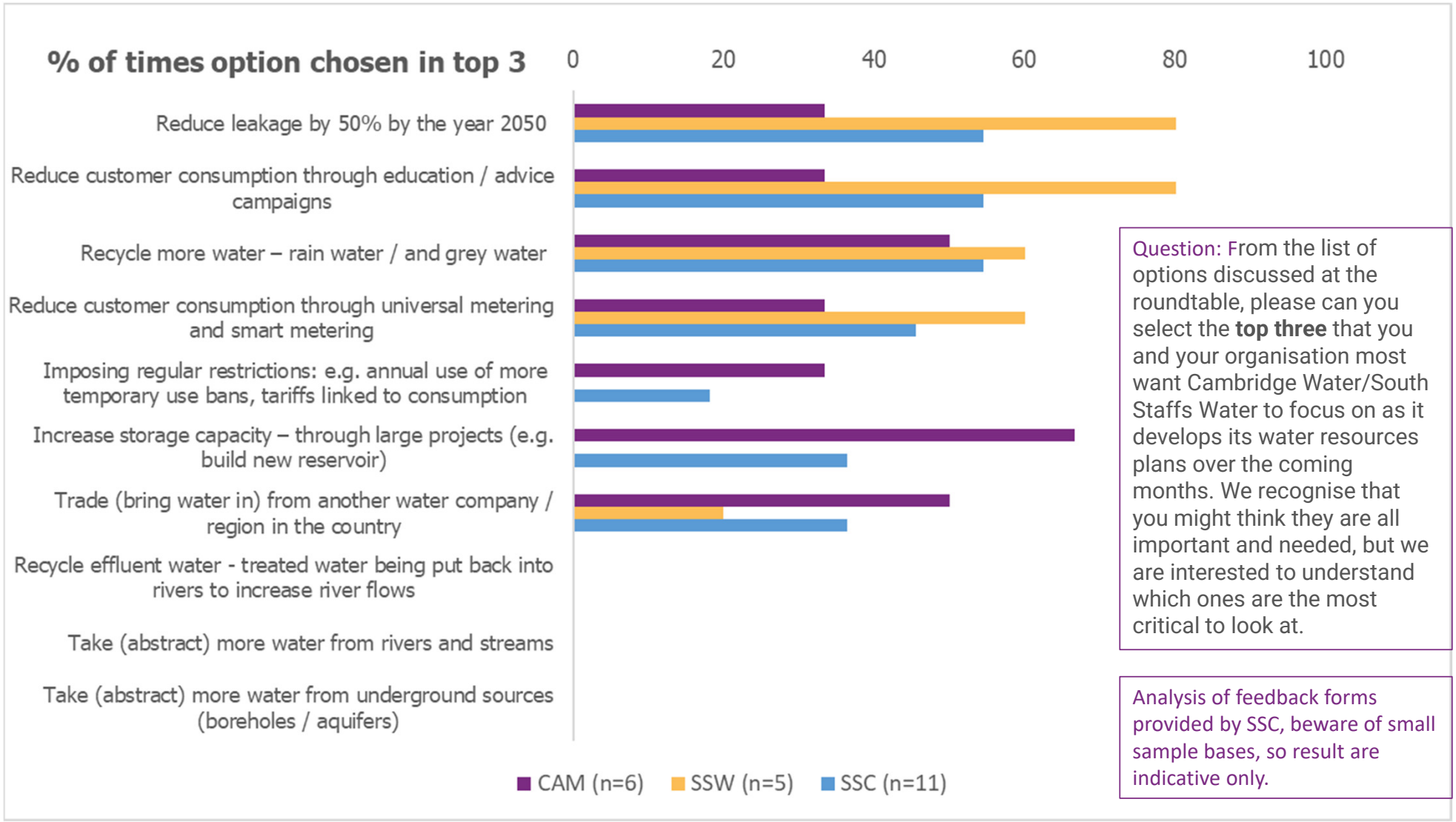
- Stakeholders working with customers in debt stressed the need to **balance ambition and speed of environmental improvement against what customers can afford**, and to consider going more slowly to protect customers from steep bill increases.

**Although a wide range of organisations were invited, the roundtables did not have a completely representative mix of organisations**

## Cambridge - 18 attendees (with a bias towards environmental groups

- There was strong support for Cambridge Water to **do more on demand management and do it soon** e.g. increase ambition on PCC; introduce universal metering; and use restrictions as part of business as usual rather than only in the most extreme situations.
- Levels of detailed knowledge about the supply-side options varied. A new reservoir was generally seen as an essential component of the plan. **Transfers elicited mixed feelings**, ranging from an essential component of the plan in the medium term to unacceptable because of environmental impacts.
- **Environmental impact was by far the most important criterion when choosing between options**. Cost was much less of a consideration; it was suggested that customers should simply absorb the cost, with measures put in place to protect customers in financial difficulty.
- Stakeholders argued strongly that Cambridge Water should **aim for the highest level of environmental ambition** and aim to achieve it as quickly as possible.

# Feedback from attendees




Question: From the list of options discussed at the roundtable, please can you select the **top three** that you and your organisation most want Cambridge Water/South Staffs Water to focus on as it develops its water resources plans over the coming months. We recognise that you might think they are all important and needed, but we are interested to understand which ones are the most critical to look at.

Analysis of feedback forms provided by SSC, beware of small sample bases, so result are indicative only.

# Feedback from Cambridge attendees (cont'd)…

I appreciate that in the short to medium term transfers from other areas will probably be the only option towards holding and possibly reducing abstraction rates but this should only be if the supplies can be ecologically sustainable. The use of recycled effluent water suitably treated back into the public supply should also be considered particularly in the light of the proposed new treatment works at Honey Hill. My main concern is to see large reductions in the rate of abstraction from the chalk aquifer so as to restore the health of the chalk streams and the adjacent green infrastructure

The state of the aquifer makes it urgent to bring in water and not wait for new reservoirs

All options should be part of the mix. Briefly… Short term – increase dramatically the pace of leakage reduction and (compulsory) metering (as near as possible to 100% by 2030?), bring in annual restrictions, convey to the public that this is an area of serious water stress and hence they need to save water, cap abstraction at current levels, meet the needs of new developments solely through transfers from Anglian Water, set demanding targets for water harvesting, grey water reuse for new developments.
Long term – in addition to the above, reduce abstraction from your boreholes substantially (60-70% overall), let the instead water flow freely to feed and sustain the Chalk stream springs and headwaters, capture and store that water downstream of Cambridge as surface water and feed it back into your supply systems from there. Also develop new tariff systems…

# Feedback from SSW attendees (cont'd)…

Based on the meeting I'd ne against taking more abstract water and the more environmentally damaging options. Hard to have a strong view however without far more knowledge on cost/efficiency and a detailed knowledge of environmental impact. Reducing consumption and leaking, and improving recycling all seem very positive though. I'd ne against taking more abstract water and the more environmentally damaging options. Hard to have a strong view however without far more knowledge on cost/efficiency and a detailed knowledge of environmental impact. Reducing consumption and leaking, and improving recycling all seem very positive though.

Recycling is one of the main factors in society now and has become more acceptable which in turn benefits the environment. More effective education/awareness needs to be put in place in regards to how to save water. Meters and increase charges should be considered carefully in regards to the different increases that are been put in place at present, such as increased energy bills etc. Mindfulness of affordability at this present time is a major factor which in turn could lead to more people in debt which will impact on South Staffs Water financial outcomes.

NE [Natural England} strongly encourages the utilisation of demand side options.

# Opportunities for collaboration and consideration for future events

**Stakeholders suggested opportunities for collaboration:**

- **SSW -** Stakeholders offered help with the WRMP development and implementation, for example by supporting customers with financial problems that might arise from universal metering. Some stakeholders also asked for input from South Staffs Water into their own work (e.g. development of a local plan and climate change strategy).

- **Cambridge -** There was strong support for collaborative working and many offers of help, mainly on public communication/education and working with government and Ofwat to change the regulatory framework.

**For future stakeholder engagement it might be worth considering the following:**

- A shorter session might encourage more senior individuals/more diverse range of attendees
- SSC could consider trying to 'piggy-back' onto other stakeholder meetings/forums. For example:
  - A slot at a meeting of a local business forum (worked for Thames Water in PR19).
  - Voluntary sector forums also sometimes happy to provide access to members (or distribute information).
- The online format worked better than expected but it might be worth considering a face to face session for the next roundtable (pandemic permitting).
  - Easier to facilitate face to face and it's easier to get more granular feedback.
  - However, this needs to be weighed up against the fact that attendance of online sessions might be higher as it's less time-consuming to attend.

## Recommendations

- Keep WRAP members engaged by further communication and feedback on the findings.
- Whilst the option of follow up live group discussions was discussed in planning stages there is no obvious need for these given the detailed responses.
- As SSC develops its plans further, be mindful of key messages / findings:
  - Being ambitious in terms of the timescales of universal metering
  - Achieving balance in terms of supporting vulnerable customers, whilst not placing too much financial burden on other customers.
  - Consideration of the feasibility of a usage-based tariff as it strongly resonated because of its perceived fairness.
  - The need for effective customer communication to explain decisions particularly around water transfers which, whilst supported in principle, have numerous associated concerns/questions.

## Next steps

- Consider the need for live online groups and at what stage they will add value
- Keep in mind the WRAP as an engaged group of customers and public who could be convened at relatively short notice
- Stakeholder roundtable sessions – to follow in the New Year

# Appendices

# WRAP participant profile – Deep dive participants shown in blue

| | SSW WRAP | SSW Deep Dive | CAMBS WRAP | Cambs Deep Dive |
|---|---|---|---|---|
| **Total** | 22 | 20 | 25 | 20 |
| SME owners *(mix sectors and size)* | 5 | 4 | 5 | 4 |
| Future bill payers – *(mix of current work / study and home circumstances)* | 4 | 3 | 5 | 3 |
| Bill-payers (jointly or solely responsible for bill), of which: | 13 | 13 | 15 | 13 |
| **Gender** | | | | |
| Male | 12 | 11 | 10 | 8 |
| Female | 10 | 9 | 15 | 12 |
| **Age** | | | | |
| 18 to 24 | 4 | 3 | 5 | 3 |
| 25 to 39 | 5 | 5 | 8 | 7 |
| 40 to 54 | 10 | 10 | 4 | 3 |
| 55 to 70 | 2 | 1 | 7 | 6 |
| 70+ | 1 | 1 | 1 | 1 |
| **Children at home** | | | | |
| Children in household | 5 | 5 | 6 | 6 |
| **Ethnicity** | | | | |
| BAME Background | 4 | 4 | 4 | 4 |

| | SSW WRAP | SSW Deep Dive | CAMBS WRAP | Cambs Deep Dive |
|---|---|---|---|---|
| **Socio Economic Group** | | | | |
| ABC1 (includes SMEs) | 13 | 11 | 18 | 14 |
| C2DE | 9 | 9 | 7 | 6 |
| **Working status** | | | | |
| Employed (full or part time) Includes SMEs | 18 | 16 | 19 | 17 |
| **Water Meter in Home** | | | | |
| Yes | 14 | 12 | 17 | 13 |
| **Home location** | | | | |
| Rural | 4 | 3 | 16 | 13 |
| **Vulnerable circumstances** | | | | |
| Vulnerability | 5 | 5 | 5 | 4 |
| **SSC Segment** | | | | |
| Connected but struggling | 3 | 3 | 3 | 3 |
| Engaged Loyal Carers | 2 | 2 | 3 | 1 |
| Don't Bother Me | 3 | 3 | 1 | 1 |
| Caring But Time Pressed | 3 | 2 | 7 | 7 |
| Savvy Switchers | 2 | 2 | 4 | 3 |

# Evaluation survey

South Staffs Water

| | Very good | Quite good | Quite poor |
|---|---|---|---|
| Understanding the tasks and questions | 14 | 5 | 1 |
| Being able to have your say | 17 | 3 | - |

| | Too much | About right | Too little/few | N/A |
|---|---|---|---|---|
| The amount of time you had to spend on the research | 1 | 19 | - | - |
| The amount of emails from Community Research | - | 19 | 1 | - |
| The amount of support you received if you had problems | - | 10 | - | 10 |

Cambridge Water

| | Very good | Quite good | Quite poor |
|---|---|---|---|
| Understanding the tasks and questions | 13 | 7 | - |
| Being able to have your say | 17 | 2 | 1 |

| | Too much | About right | Too little | N/A |
|---|---|---|---|---|
| The amount of time you had to spend on the research | 1 | 18 | 1 | - |
| The amount of emails from Community Research | 2 | 18 | - | - |
| The amount of support you received if you had problems | - | 7 | - | 13 |

# Stimulus material

| Topic | Stimulus | Slide number |
|---|---|---|
| Metering 'Quick Quiz' | Same questions in both areas but answers may be different<br>Metering quiz questions | 20 |
| Initial views of metering | Same stimulus in both areas but company names are changes<br>Why metering considered Cambs | 21 |
| Rollout of universal metering - options | Cambridge<br>https://vimeo.com/624476271/35c510783e<br>SSW<br>https://vimeo.com/624449744/011774c548<br>Summary of options | 22-28 |
| Rollout of universal metering - support | https://vimeo.com/624442014<br>Summary of support options | 29-34 |

# Stimulus material (cont'd)…

| Topic | Stimulus | Slide number |
|---|---|---|
| Water Transfers in principle | Severn Trent to pump water to drought region - BBC News | 47-48 |
| Water Transfers (local) | South Staffs (shows as a PowerPoint animation)<br>Water Transfers SSW<br>Cambridge (shown as a PowerPoint animation)<br>Water transfers Cambridge | 49-58 |
| Feedback shared with participants | South Staffs<br>Learnings from SSW<br>Cambridge<br>Learnings from Cambridge | 41, 42, 59 |