SSC WRMP: Themes 1&3

Managing Droughts
Leakage Ambition
Universal Metering
Environmental Ambition

Quantitative Insights

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V6

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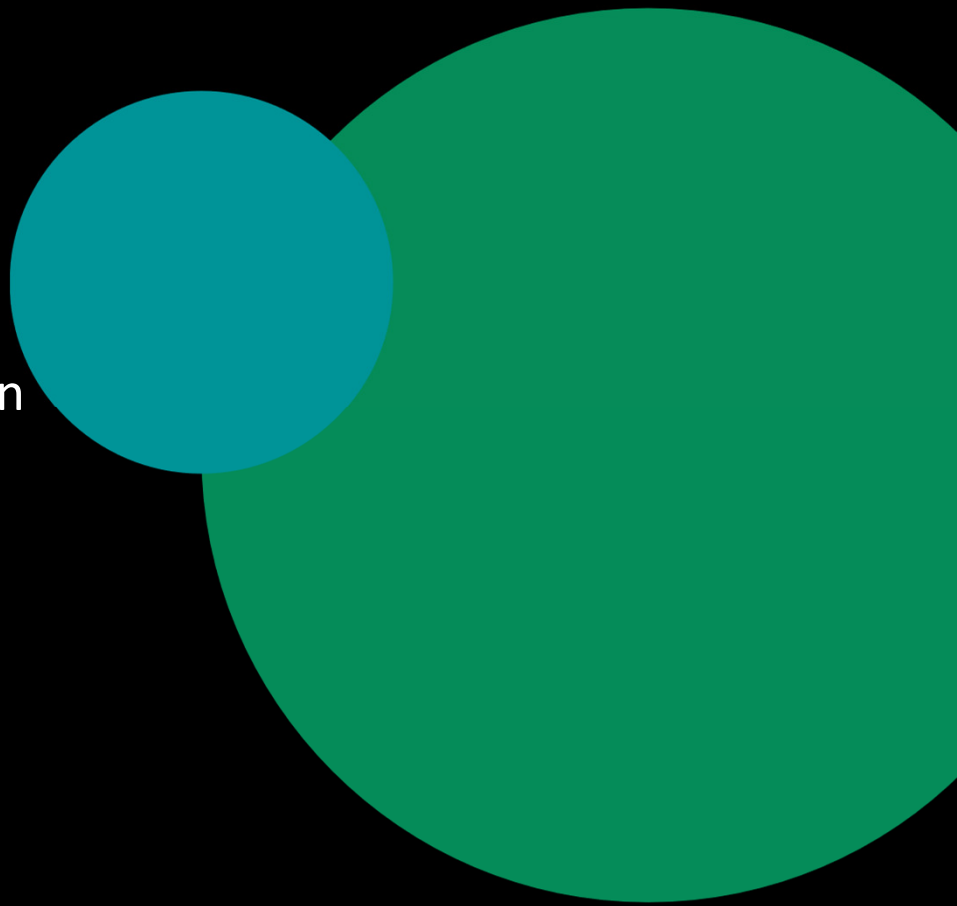

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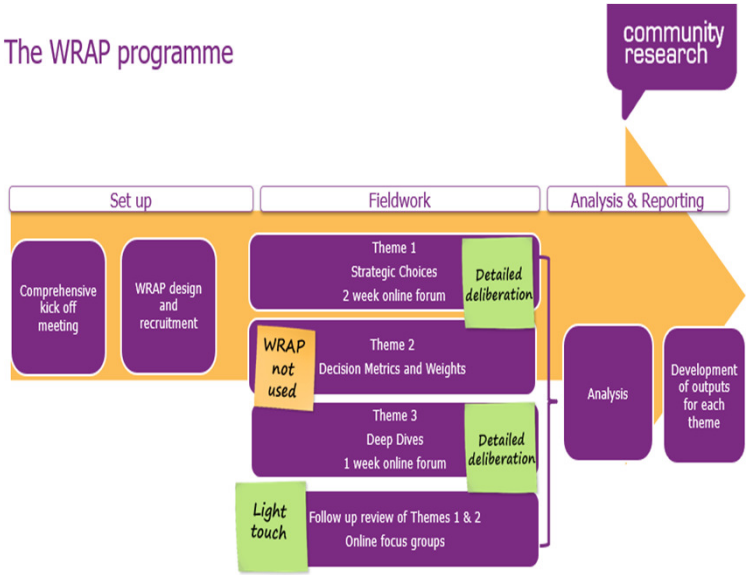
Research Background

Background

SSC requires customer input to support the development of their draft WRMP24.

ACCENT/PJM developed a core programme based on four themes to support development of SSC's draft WRMP24. Work undertaken since has included a qualitative WRAP programme and two phases of quantitative work



THEMEs 1&3: QUANTITATIVE STUDY

THEMES 1&3: PURPOSE

- Core purpose of this study was to provide evidence of customer response and support for:
  - Managing droughts
  - Universal metering
  - Leakage
  - Environmental ambition

This chart pack illustrates our customer research process and quantitative insights. The quantitative phase was developed after an extensive qualitative process the outputs of which were used to guide and shape the quantitative material development

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Methodology and Sample

Method: 1,180 interviews: 753 with SSW and 427 in CAM

Quotas set to ensure sample is representative of customer base in each of the two supply areas – South Staffs Water and Cambridge Water. Data below is based on unweighted data, though final data set **weighted** according to targets. Minimum targets missed highlighted. Fieldwork period: 4th February to 28th March 2022

Meter Status

SSW	Target	Status
Metered	239	337
Unmetered	331	353
CAM		
Metered	274	270
Unmetered	106	112

Not included: Prefer not to say/Refused

Gender

SSW	Target	Status
Female	291	364
Male	279	279
CAM		
Female	190	187
Male	190	185

Not included: Prefer not to say/Refused

Social Grade

SSW	Target	Status
AB	97	193
C1C2	291	237
DE	182	199
CAM		
AB	133	142
C1C2	182	116
DE	65	103

Sample may not add up to total as some participant cannot be classed as any SEG (future customers)

Age

SSW	Target	Status
16-34	108	101
35-49	171	183
50-64	143	203
65+	148	158
CAM		
16-34	68	61
35-49	118	86
50-64	103	100
65+	95	129

Not include Prefer not to say/ Refused

Bill Payer Status

Total	Target	Status
Bill payer	n/a	978
Non payer	n/a	34

Sample Source

SSW	Target	Status
Panel	300	407
SSC	300	285
Accent F2F	60	61
CAM		
Panel	200	157
SSC	200	229
Accent F2F	40	41

Type

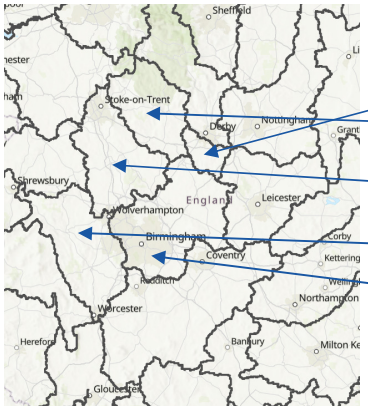
Total	Target	Status
HH	1,000	1,028
NHH	Min 100	152

SSC Attitudinal Segments

ALL	#	% in sample	% market
Caring But Time Pressed	282	24%	23%
Engaged Loyal Carers	264	22%	35%
Don't Bother Me	188	16%	18%
Savvy Switchers	274	23%	6%
Connected But Hard Pressed	172	15%	15%

Method: 1,180 online interviews: 753 with SSW and 427 in CAM

Catchment Area

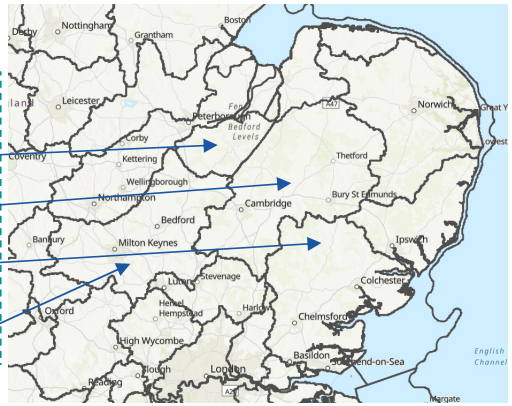


SSW catchment completes:

- Dove: 19
- Trent Valley Staffs: 73
- Lower Trent & Erewash: 5
- Severn Middle Worcs: 107
- Tame Anker & Mease: 562

CAM catchment completes:

- Upper & Bedford Ouse: 37
- Cam and Ely Ouse: 318
- Combined Essex: 6
- Old Bedford & Middle Level: 42



Ethnicity

	Total	CAM	CAM CENCUS	SSW	SSW CENCUS
British	83%	84%	85%	82%	79%
Irish	1%	2%	1%	1%	1%
Any other White background	3%	5%	4%	3%	2%
White and Black Caribbean	1%		1%	1%	2%
White and Asian	1%	0%	0%	1%	0%
Any other Mixed background	0%	0%	0%	0%	0%
Indian	3%	0%	1%	4%	4%
Pakistani	1%	1%	1%	1%	4%
Bangladeshi	2%	1%	0%	3%	1%
Any other South Asian background	0%	1%	0%	0%	1%
Caribbean	1%		1%	1%	2%
African	0%		1%	0%	1%
Any other Black background	0%	0%	0%	0%	1%
Chinese	0%	1%	0%	0%	1%
Any other ethnic group	0%		0%	0%	0%
Prefer not to say	3%	5%	0%	2%	0%

Quality checks:

- Minimum completion time imposed
- Minimum time to review information and descriptions
- Straightliners removed
- Logit checks

Follow ups:

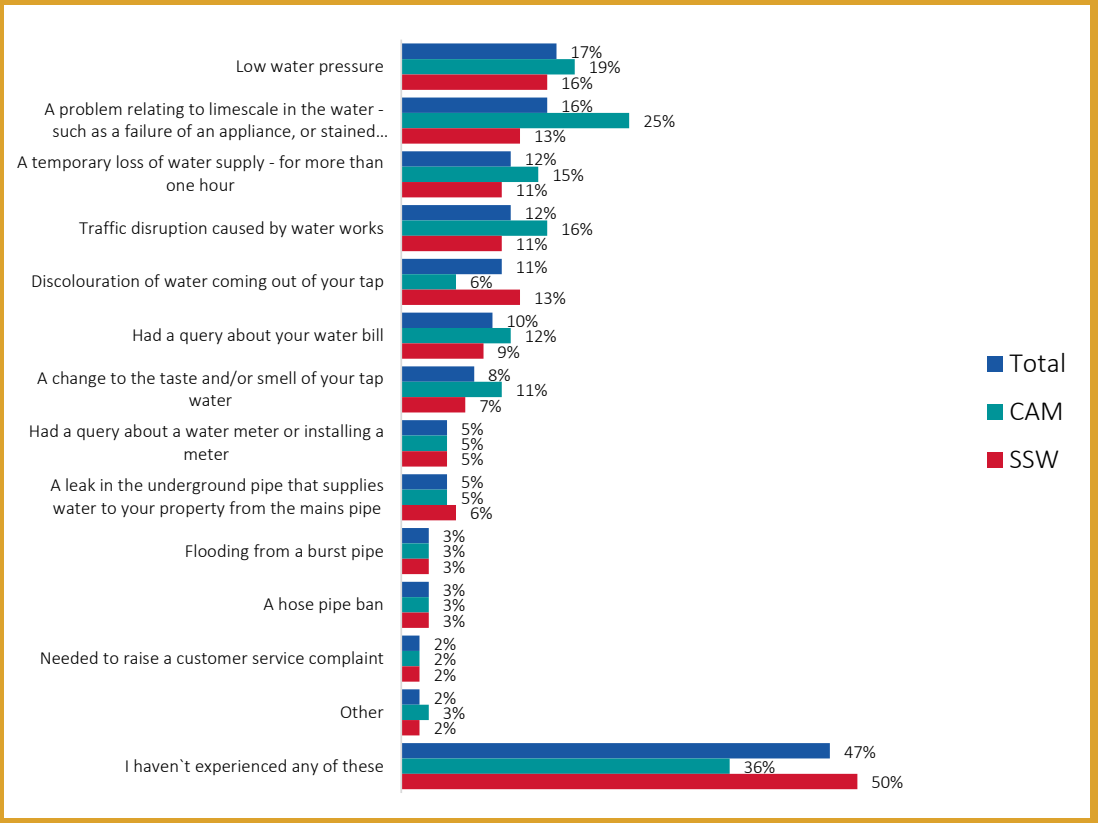
- 19% opted in to H2Online signup
- 67% requested a summary of results

SAMPLE CHARACTERISTICS

SERVICE ISSUE EXPERIENCE/VULNERABILTIY

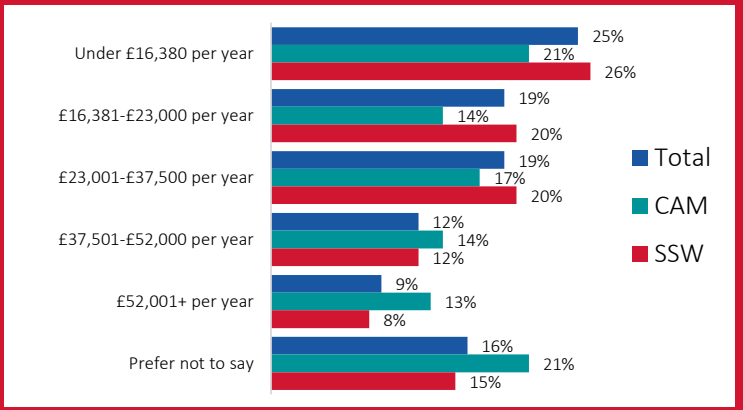
SERVICE ISSUE EXPERIENCE

53% had some form of service experience over the last 2 to 3 years
53% HH and 59% NHH

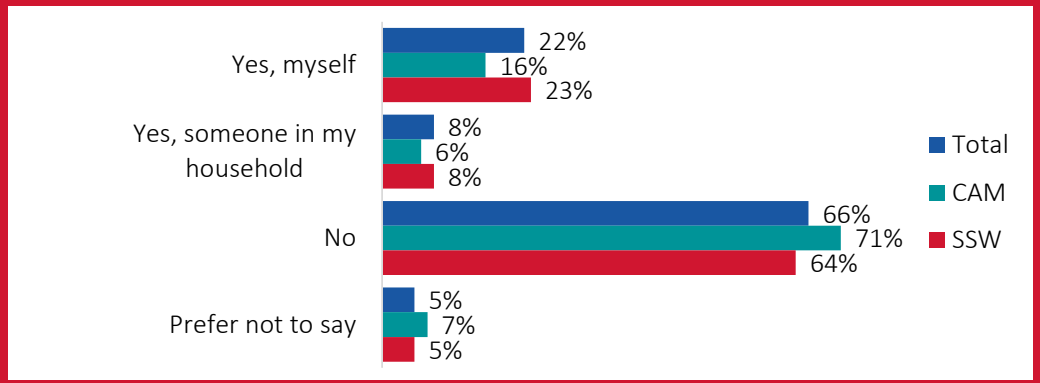


VULNERABILITY: 41% OF TOTAL SAMPLE

- 25% live in a household with an annual income under £16,380 pa
- And 11% of the sample live in a household where someone is on the SSC PSR



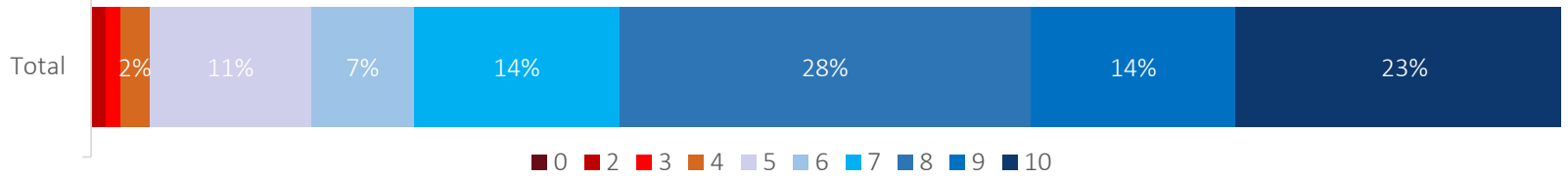
Approx. one in three live in a household where one or more person is in receipt of benefits. Higher in SSW cf CAM



SATISFACTION, TRUST AND VALUE MONEY
CUSTOMER PERCEPTIONS

OVERALL SATISFACTION: MEAN = 7.87

SSW (7.95) IS SIG HIGHER THAN CAM (7.61); BILL PAYER (7.93) IS SIG HIGHER THAN NON-PAYER (7.29); FEMALE (8.02) IS SIG HIGHER THAN MALE 7.77); ENGAGED LOYAL CARERS (8.48) IS SIG HIGHER THAN ALL OTHER SEGMENTS

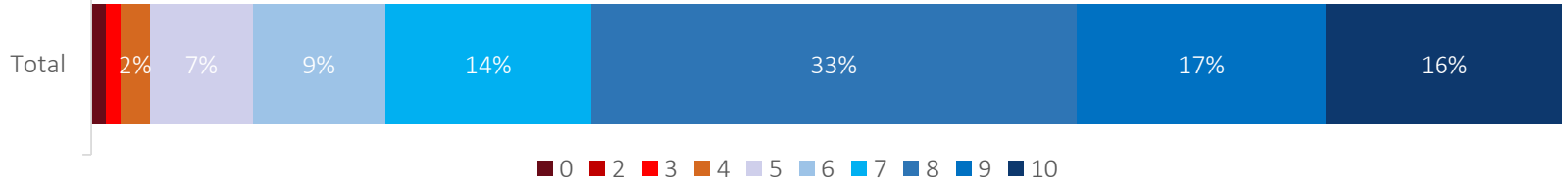


7.87

- Overall satisfaction scored 0 to 10 where 0 = extremely satisfied and 10 = extremely satisfied
- C-Sat = 7.44 (online sample)
- Priorities = 7.91
- MCDA score: 7.77

TRUST

TAME ANKER & MEASE (7.82) IS SIG HIGHER THAN SEVERN MIDDLE WORCESTERSHIRE (7.17); DON`T BOTHER ME (7.05) IS SIG LOWER THAN ALL OTHER SEGMENTS,

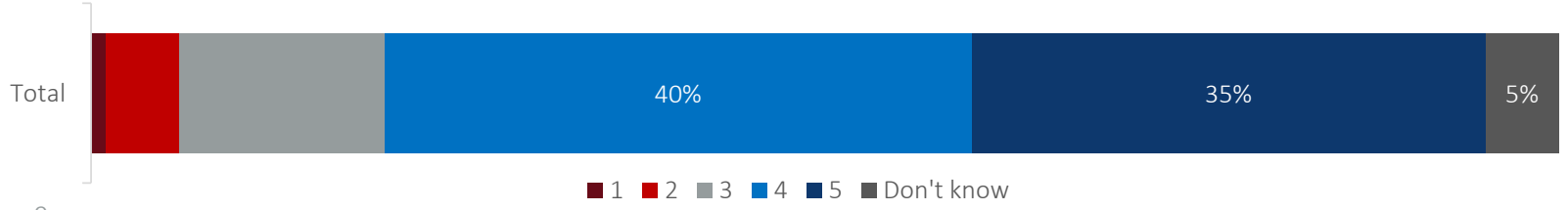


7.75

- 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)
- Priorities = 8.15
- MCDA score: 7.79

SATISFACTION WITH VALUE FOR MONEY: MEAN = 4.09

65+ (4.22) IS SIG HIGHER THAN 18-34 (3.86)



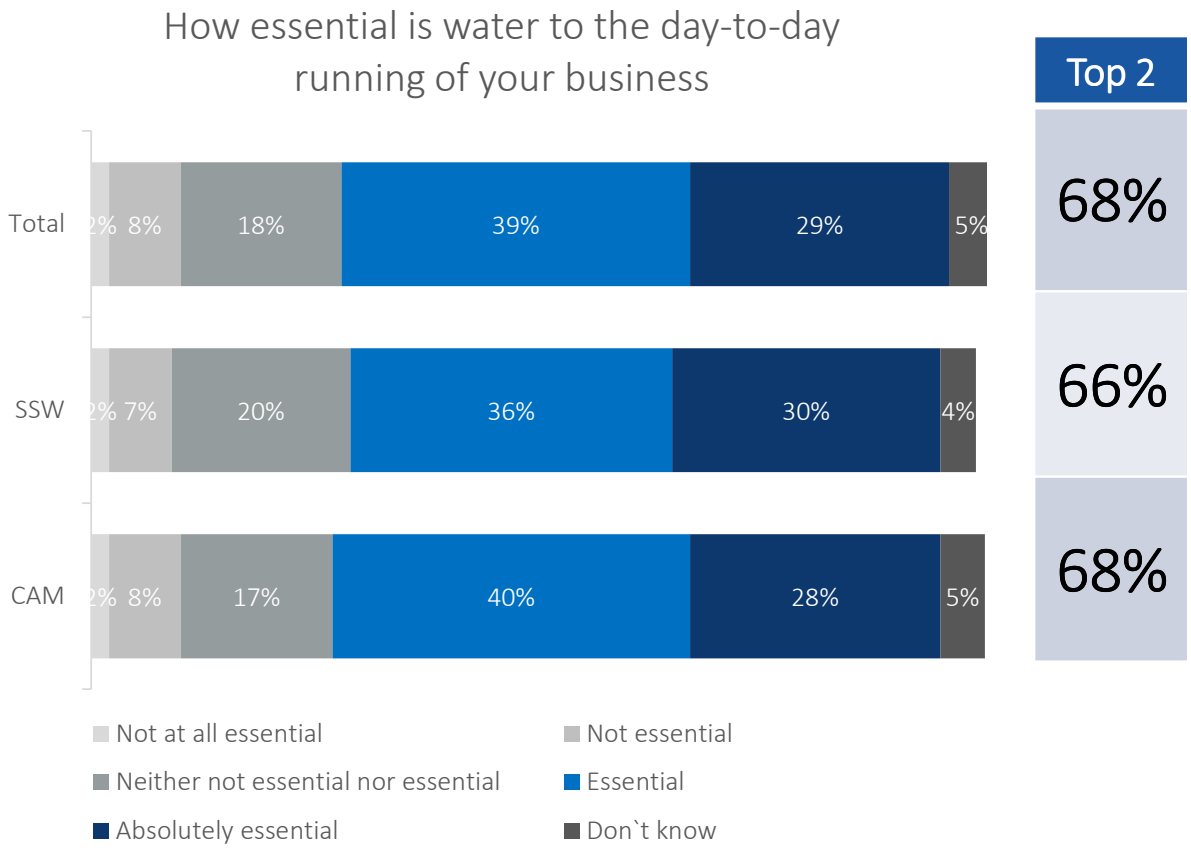
4.09

- VFM scored 1 to 5 where 1 = very dissatisfied and 5 = very satisfied
- C=Sat = 3.59 (online sample)
- Priorities = 3.95
- MCDA score: 4.04

LOW TRUST/SATISFACTION → **HIGH TRUST/SATISFACTION**

BUSINESS PROFILE: Overall 152 interviews, 73 for SSW, 33 for CAM

Majority of NHH participants state that water is essential to the day to day running of their business. More so in CAM than SSW (although this difference is not statistically significant)



Top 2
68%
66%
68%

Number of employees	ONS %	Survey %
1-49	34.2%	31%
50-249	13.8%	11%
250-499	5.5%	6%
500+	4.6%	43%
DNA		9%

Due to the difficult nature of collecting business responses (they are less engaged than HH), we have accepted the natural fall out of the sample, which is not in line with ONS data. NHH recruited via carefully targeted screening questions from online panels and SSC's household database. Of the 152 completes – 49 came from SSC supplied sample and 103 from commercial panels.

Sector	%
Education	14%
Health and social work	14%
Government and Defence	9%
Construction	8%
Retail	7%
Information, Telecommunications	7%
Professional, scientific and technical activities	7%
Banking, Finance, Insurance	5%
Transport and Storage	4%
Food, Drink and Tobacco Manufacturers and Other Manufacturing	3%
Business Admin and support services	3%
Other service activities	3%
Hotel, catering, Camp sites, restaurants, cafes, accommodation, pubs	2%
Real estate and property activities	2%
Utilities and Energy	1%
Arts, Recreation, Entertainment	1%
Other	6%
Prefer not to answer	5%

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Q68. How essential would you say the supply of water is to the day-to-day running of your business? (n=152)

Executive Summary

Executive Summary

Context:

- Whilst customers are still engaged with and concerned about the environment/climate change, there is evidence that the cost of living crisis is pushing environmental issues down customers' concern list (water bills and poverty/ inequality moved to 2nd and 3rd pace respectively since the MCDA survey)
- In response to planning balances, SSW customers overall slightly favored keeping bills as low as possible for customers. Cambridge customers as a population were more evenly split between keeping bills low and investment

Managing Droughts:

- Uninformed: around three quarters of customers support the use of more frequent TUBs/NEUBs – with around 50% supporting their use every time there is a long period of dry weather
  - Environmental concerns and ensuring long term resilience drive this support
- Uninformed: 52% of customers find the current level of risk of drought restrictions acceptable (49% SSW cf 57% CAM)
- Informed: broadly the same proportion (54%) support reducing the risk to once every 500 years by 2040. One in three would like to the target achieved earlier than 2040
- Informed: of the three propositions tested the highest level of support for reducing customer demand for water was the use of TUBs/NEUBs every summer where the amount of rainfall is well below average (62% supported)
  - Although it received the lowest level of support, 43% of customers support the use of TUBs/NEUBs every summer - mainly to discourage heavy users of water.

Executive Summary

Universal metering:

- Uninformed: just under half of customers (47%) support the introduction of universal metering – significantly higher in CAM compared with SSW and amongst metered customers
- Informed: support for universal metering increases (significantly) by 6pp
- Customer support is driven by 5 key reasons:
  - Greater equitability
  - Control and awareness
  - Incentive to reduce consumption
  - Protecting the environment
  - Potential to save money

Informed support	Support	
Total	53%	
Total metered	71% ▲	Significantly higher than unmetered
Total unmetered	31%	
Metered- CAM	76% ▲	Significantly higher than unmetered
Unmetered - CAM	41%	
Metered - SSW	70% ▲	Significantly higher than unmetered
Unmetered - SSW	28%	

- Informed: when considering options for a universal metering roll out programme, 38% of customers support the approach that minimises costs – a shift from the Community Research qualitative work, where the highest level of support was to minimise the demand for water as quickly as possible (only 27% supported this approach in this study)
- Informed: 37% are not prepared to pay any more to deliver universal metering
  - Of those who are prepared to pay more, customers in Cambridge region (27%) are significantly more likely to pay an additional £4 per year to see universal metering delivered by 2035. SSW customers most likely to support an extra £2.50 by 2050 (24%).
- Informed: monthly meter reads are the most commonly preferred frequency for receiving meter reads (39%)
- Informed: 26% of customers are prepared to pay an additional £2.50 per year for monthly or twice monthly meter read

Executive Summary

Leakage:

- **Uninformed:** 46% of all customers want to see leakage reduced to as close as zero as possible
- **Informed:** 80% support the national target for reducing leakage – just 2% oppose the target
- Customers who are more engaged with protecting the environment were significantly more likely to have a higher level of support for the national target for reducing leakage.
- Key reasons for supporting the national target for reducing leakage are:
  - Wasting water doesn't make sense – 'we'll leave more water for future (if leaks are fixed)'
  - Educate customers to be more aware of water usage/ shortages
  - The right thing to do
  - Impossible to reduce leakages to 0%

Environmental ambition:

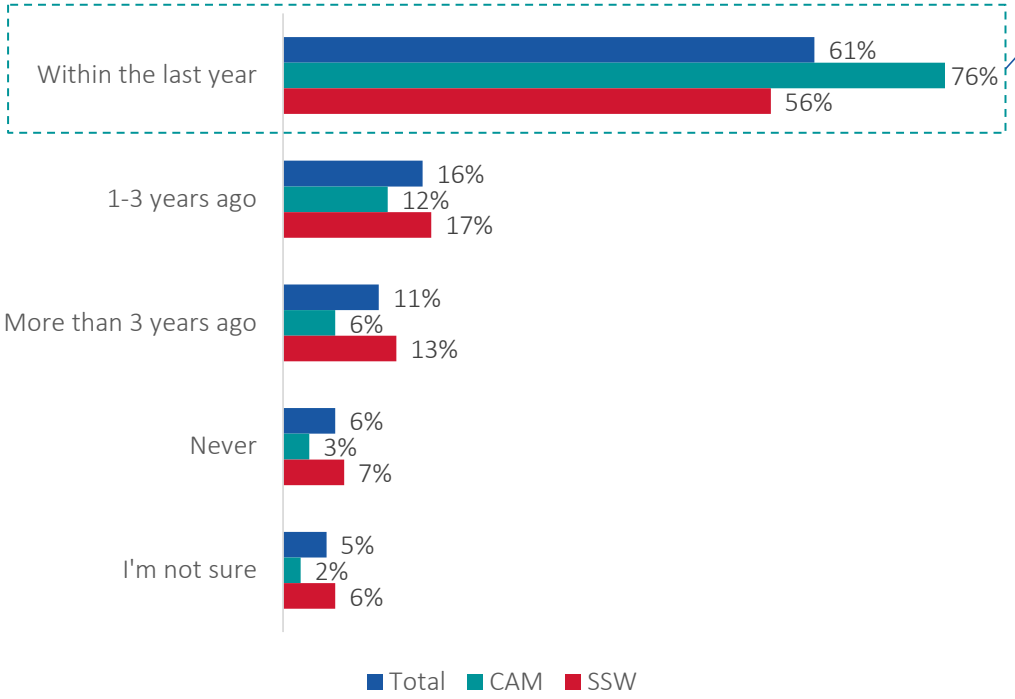
- **Informed:** customers are most supportive of level 2 - *The water environment stays as protected as it is now, but South Staffs/Cambridge Water also prioritises some of these to protect and improve them* – with customers preferring a balance between protecting the environment and cost
- Those who support Level 3 are significantly more likely to be environmentally engaged/concerned
- And those who support Level 1 are generally environmentally supportive, but are concerned about the impact of the cost of living crisis and uncertainty around household bills
- **Informed:** 46% of SSW customers support the 2050 deadline for reaching their preferred environmental destination
  - CAM customers split between those supporting the proposed timeline (42%) and those who believe if is too late (38%).

Planning Balances and Environment Consideration

Visit water environment:

6 in 10 visit rivers, lakes or reservoirs in the last year. This figure is significantly higher among Cambridge customers (76%)

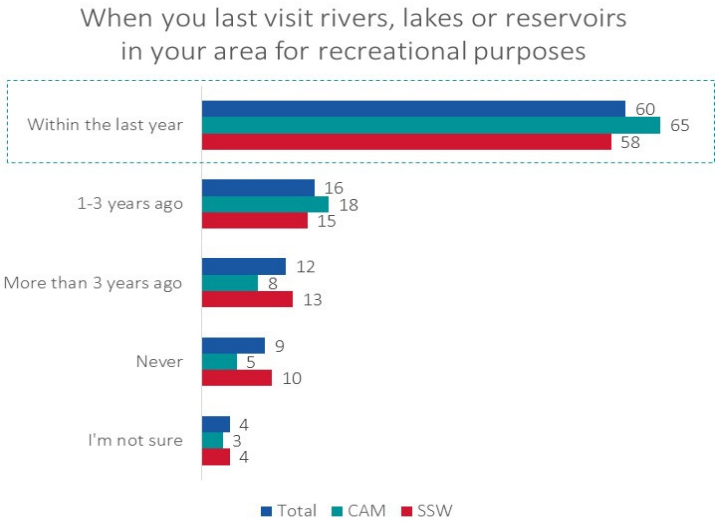
When you last visit rivers, lakes or reservoirs in your area for recreational purposes



Within the last year - Sig higher among:

- CAM (76%)
- Cam & Ely Ouse (77%)
- NHH (773%) when compare to HH (60%)
- AB (72%) when compared to C1C2 (57%) and DE (55%)
- Savvy switchers (72%) when compared to Caring but Time Pressed (59%), Don't Bother Me (49%)

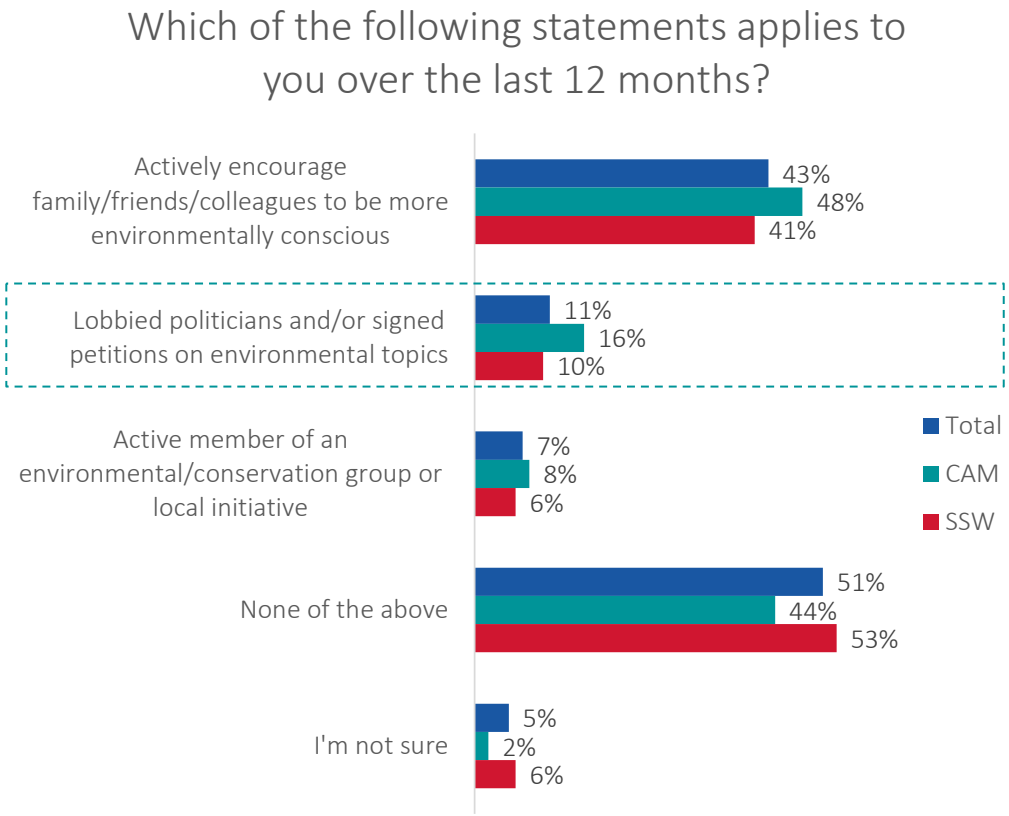
Consistent with MCDA findings:



Q26. When did you last visit rivers, lakes or reservoirs in your area for recreational purposes e.g. walking, cycling, fishing, (n=1,180, CAM: 427, SSW: 753)

Environmental activity engagement:

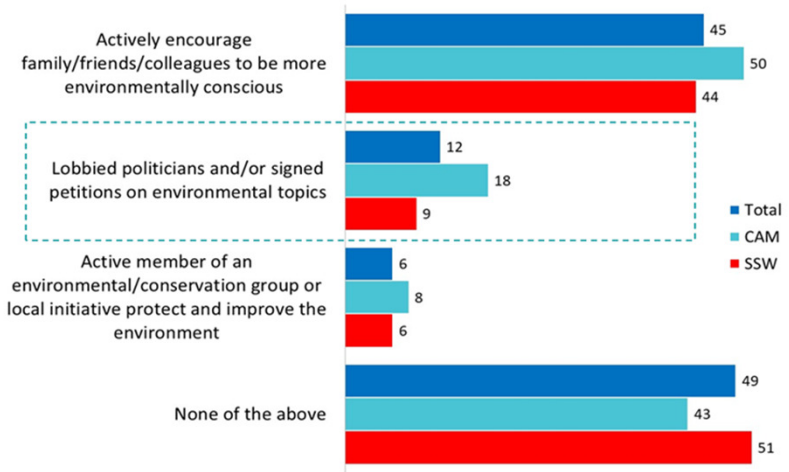
Around half of all customers claim to be actively involved in some type of environmental activity. This figure is significantly lower in SSW when compared to CAM



Lobbied politicians and/or signed petitions on environment topics - Sig higher among:

- CAM (16%); Cam & Ely Ouse (18%),
- Engaged Loyal Carers (15%); Savvy switchers (21%)

Consistent with MCDA findings:



Q59. Which of the following statements applies to you over the last 12 months? (n=1,028, CAM: 381, SSW: 647)

Perception about the environment & water usage:

The local environment – both the impact of climate change and protecting lakes/rivers etc. – are important to the majority of customers

Protecting lakes, rivers, reservoirs, fish and other aquatic plants and wildlife is really important to me

	Total	CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Top 3 box	60%	65%	59%	64%	52%	60%	70%
Mean score	7.85	8.12 ▲	7.75	8.15	7.43 ▼	7.73	8.29

I am concerned about the impact of climate change on the natural environment in my area

	Total	CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Top 3 box	53%	61%	50%	62%	46%	49%	39%
Mean score	7.27	7.74 ▲	7.11	7.81 ▲	6.75	7.17	6.55

I do more to save energy than I do to save water in my home

	Total	CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Top 3 box	27%	21%	29%	21%	30%	29%	24%
Mean score	5.85	5.53	5.95 ▲	5.63	6.05	5.88	5.56

I worry about the amount of water available for use in my local area

	Total	CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Top 3 box	21%	30%	17%	28%	7%	18%	15%
Mean score	5.08	5.74 ▲	4.86	5.67 ▲	4.37	4.86	5.09

I don`t think much about saving water, I just take it for granted really

	Total	CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Top 3 box	16%	14%	19%	13%	14%	18%	14%
Mean score	4.24	3.7	4.43 ▲	3.74 ▼	4.6	4.39	4

Q27. How much do you agree or disagree with the following statements: (n=1,180, CAM: 427, SSW: 753)

▲▼ Sig higher or lower than at least one attribute in the same category

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But are, understandably, more important to those who are actively engaged in some sort of environmental activity

		Total	I am an active member of an environmental/conservation group	I actively encourage family/friends/colleagues to be more environmentally conscious	I have lobbied politicians and/or signed petitions on environmental topics	None
Protecting lakes, rivers, reservoirs, fish and other aquatic plants and wildlife is really important to me	Top 3 box	60%	69%	74%	82% ▲	49% ▼
	Mean	7.85	8.64	8.37	8.96	7.3
I am concerned about the impact of climate change on the natural environment in my area	Top 3 box	53%	65%	68%	76% ▲	36% ▼
	Mean	7.27	8.29	8.08	8.5	6.38
I do more to save energy than I do to save water in my home	Top 3 box	27%	24%	28%	22%	25%
	Mean	5.85	6.21	5.9	5.54	5.72
I worry about the amount of water available for use in my local area	Top 3 box	21%	30%	26%	33% ▲	14% ▼
	Mean	5.08	6.02	5.49	5.95	4.52
I don`t think much about saving water, I just take it for granted really	Top 3 box	16%	15%	13% ▼	12% ▼	20% ▲
	Mean	4.24	4.52	3.86	3.53	4.52

Q30. How much do you agree or disagree with the following statements (n=1,180

▲▼ Sig higher or lower than at least one attribute in the same category

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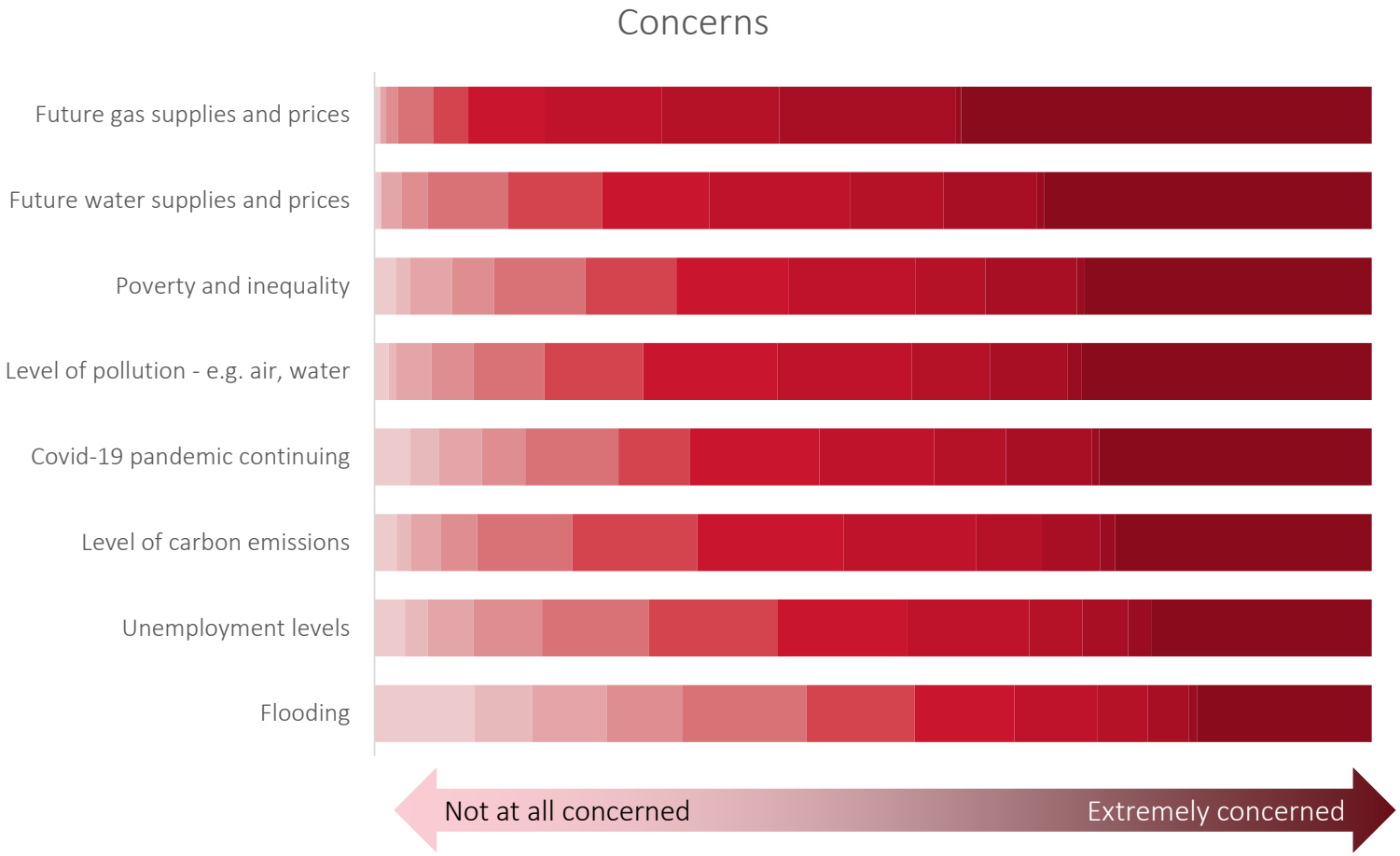
Customers' concerns:

Compared to the MCDA study, customers are most concerned about prices, especially gas and water. Concerns about COVID dropped to 5th position. Poverty & inequality went up to 3rd place



	Top 3 box	Mean	
Future gas supplies and prices	70%	**8.15**	Sig higher in SSW
Future water supplies and prices	49%	**7.22**	Sig higher in SSW
Poverty and inequality	41%	**6.67**	
Level of pollution - e.g. air, water	41%	**6.81**	
Covid-19 pandemic continuing	38%	**6.44**	
Level of carbon emissions	35%	**6.62**	
Unemployment levels	29%	**6.1**	Sig higher in SSW
Flooding	21%	**5.19**	Sig higher in CAM

Q34. On a scale of 1-10 how concerned are you about the following in the area where [HH] you live [NHH] your organisation is located? (Online Panel only , n= 564)

Customers' concerns:

Concerns about utilities costs increased. Future water supplies & prices and worries about poverty & inequality had moved closer to top of the concern list. These movements are statistically significant

Concerns – highest to lowest (Jan-early Feb 2022)

	MCDA study	
	Top 3 box	Mean
Future gas supplies and prices	59%	7.6
Covid-19 pandemic continuing	47%	7.2
Level of pollution - e.g. air, water	42%	6.7
Future water supplies and prices	41%	6.9
Reducing carbon emissions	36%	6.7
Poverty and inequality	35%	6.5
Unemployment levels	26%	6.0
Flooding	20%	5.1

Concerns – highest to lowest (late Feb – late Mar 2022)

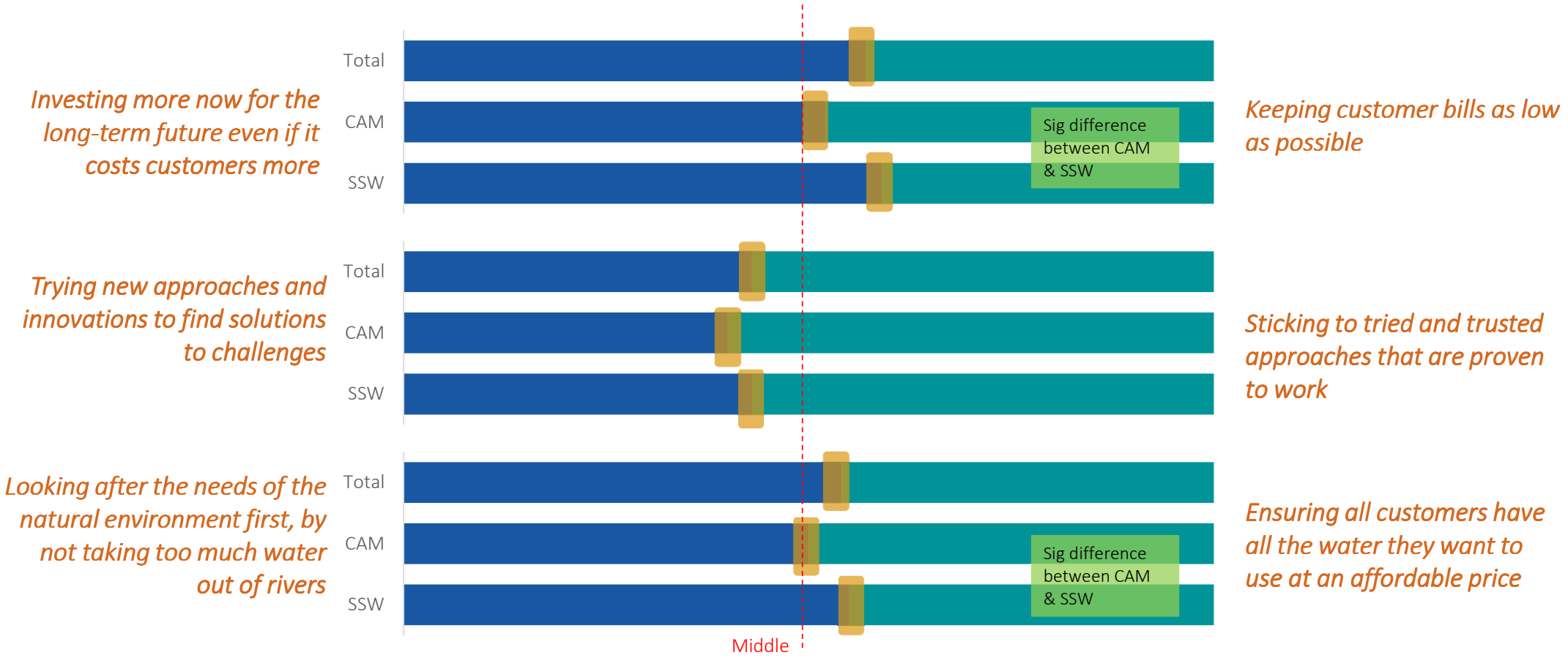
	Theme 1&3	
	Top 3 box	Mean
Future gas supplies and prices	70% ▲	8.2
Future water supplies and prices	49% ▲	7.2
Poverty and inequality	41% ▲	6.7
Level of pollution - e.g. air, water	41%	6.8
Covid-19 pandemic continuing	38% ▼	6.4
Level of carbon emissions	35%	6.6
Unemployment levels	29%	6.1
Flooding	21%	5.2

▲▼ Sig higher or lower than last wave Jan-early Feb 22

Theme 1 & 3- Q34. On a scale of 1-10 how concerned are you about the following in the area where [HH] you live [NHH] your organisation is located? (Online Panel only , n= 564) MDCA: Q34. On a scale of 1-10 how concerned are you about the following in the area where [HH] you live [NHH] your organisation is located? (Online Panel only , n= 503)

Accent

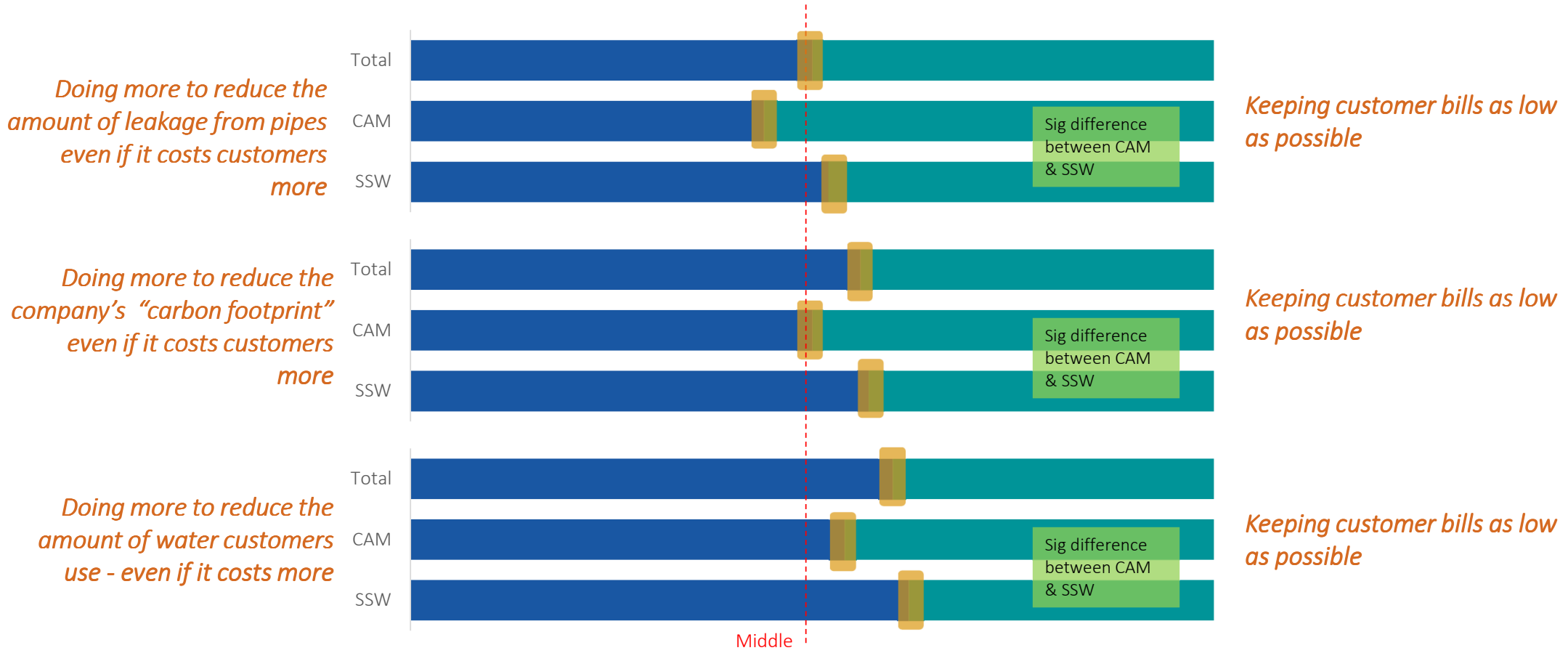
Planning balances 1: sig differences between CAM & SSW
As with the MCDA study, SSW more likely to lean towards keeping bill low/affordable



Q30. We'd like to understand your initial reaction to some key balances in terms of the company's general approach to planning and where you stand on each. Please indicate the point on the scale that that most closely reflects how you feel: , (n=1,180)

Accent

Planning balances 2: sig differences between CAM & SSW
SSW more likely to lean towards keeping bill low/affordable



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Accent

Planning balances 1 in sub-groups:

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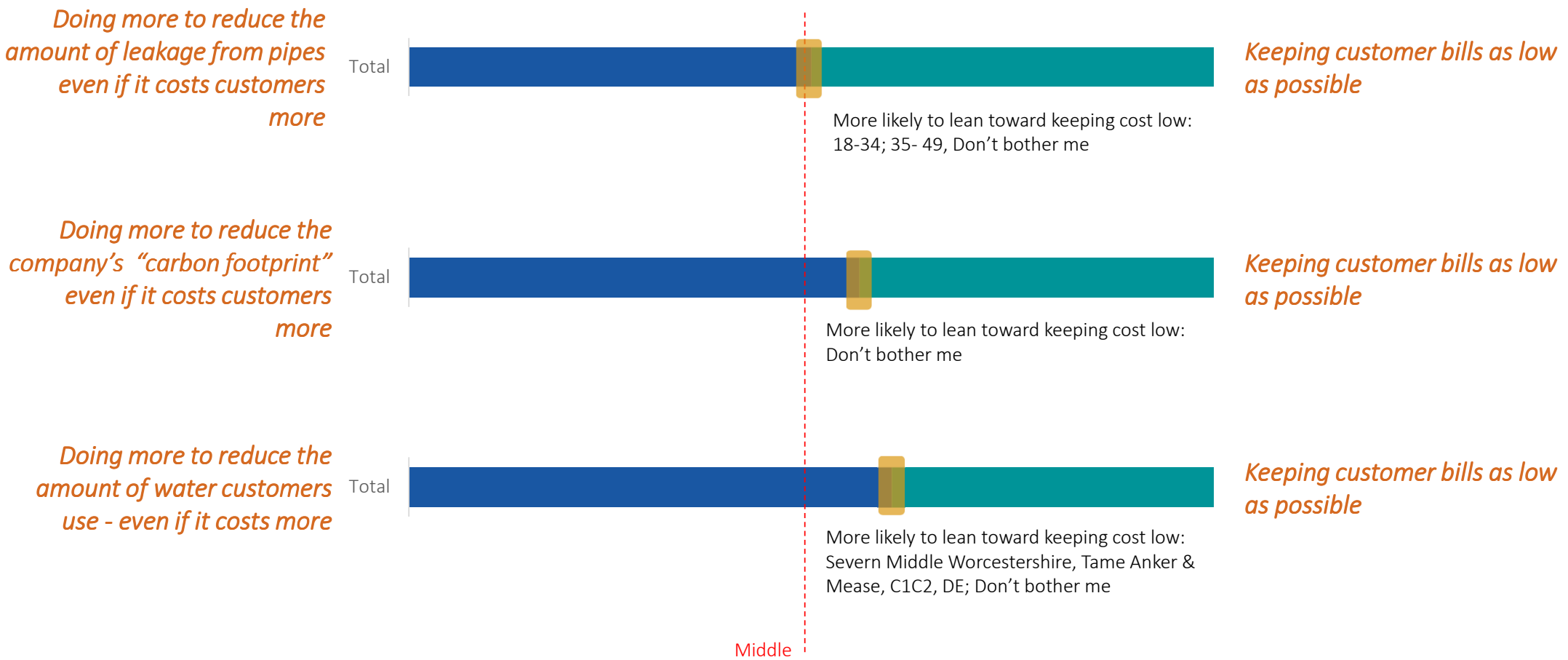
Accent

Planning balances 2 in sub-groups:



Q30. We'd like to understand your initial reaction to some key balances in terms of the company's general approach to planning and where you stand on each. Please indicate the point on the scale that that most closely reflects how you feel: , (n=1,180)

South Staffs/Cambridge Water's Water Resources Management Plan

Accent

Customers were shown information about South Staffs/Cambridge Water and their Water Resources Management Plan

About Cambridge Water

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

- Serves almost 360,000 people across 1,175sq km
- Supply approx. 139,000 homes and almost 9,000 business properties
- Supply close to 83 million litres water per day, up to 101 million litres in peak periods of use - e.g. a hot summer's day
- Drinking water comes from 23 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is 2% of customers' bills
- Merged with South Staffs Water in April 2013
- Employ approximately 440 staff in Cambridge and Walsall
- The Cambridge Water region has recently been classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand

About South Staffs Water

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

- Serves 1.3 million people across 1,500 km²
- Supply approx. 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 20 underground water sources
- As a household customer, you **can't** choose which company supplies your water
- The amount of money that will go to shareholders between 2020 and 2025 is 2% of customers' bills
- Merged with Cambridge Water in April 2013
- Employ approximately 440 staff in Walsall and Cambridge
- The South Staffs Water region has recently been classed by the Government as 'seriously water stressed'. This means that there is a high risk of the amount of water available not being enough to meet human demand

South Staffs Water's Water Resources Management Plan

South Staffs Water is developing its **Water Resources Management Plan**

The next plan covers the 25 years up to 2050 and has to be updated every 5 years

This sets out:

- how they are going to **provide a secure and reliable supply of water for customers**,
- and the measures it will take to **protect the water environment from damage** – such as lakes, rivers, underground water stores called aquifers

2025

2050

In their planning, South Staffs Water need to **think about options to make the best use of the water** that they have and also **options to provide more water.** As part of this they need to think about questions like:

- **Is it what customers want them to do** and what will the impact of their decisions be on customers?
- How much will it **cost** and what impact will this have on **customers' bills**?
- Will it **impact the environment**?
- Will it give them the **water quality** needed?
- Will it give a **reliable supply** over the long-term?

South Staffs Water produces a plan at a company level, but also need to fit into a regional plan for the West of England to ensure its water resource plan is joined up with those of other companies

Cambridge Water's and South Staffs Water's Responsibilities

Water supply for customers

- Taking/collecting water from the environment
- Transport water – through 8,622km of pipes, powered by 113 pumping stations
- Operate 41 water treatment works - 20 in the Cambridge region
- Maintenance, repairs and renewals of all these assets
- Delivering water to customers' premises and fitting water meters
- Protecting and improving the natural environment by working with landowners - i.e. wildlife, trees, plants, rivers and streams

Customer facing activities

- Read meters: 75% of customers have meters in the Cambridge region / 45% in South Staffs
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help over 39,000 customers with discounted bills and assists over 49,000 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply, or visiting a Community Hub

South Staffs Water's and Cambridge Water's Responsibilities

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Customer facing activities

- Read meters: 45% of customers have meters in the South Staffs region/75% in Cambridge
- Send out bills: including offering an online MyAccount service
- Customer service: handle hundreds of queries every day through e-mail, phone, website, webchat, APP, social media, letter, SMS texts
- Extra support: help over 39,000 customers with discounted bills and assists over 49,000 customers who need extra help accessing their services – e.g. supplying bottled water in the event of people losing their supply, or visiting a Community Hub

Cambridge Water's Water Resources Management Plan

Cambridge Water is developing its next **Water Resources Management Plan**

The next plan covers the 25 years up to 2050 and has to be updated every 5 years

This sets out:

- how they are going to **provide a secure and reliable supply of water for customers** now and into the future
- and the measures it will take to **protect the water environment from damage** – such as rivers and underground water stores called aquifers

2025

2050

In their planning, Cambridge Water need to **think about options to make the best use of the water** that they have and also **options to provide more water.** As part of this they need to think about questions like:

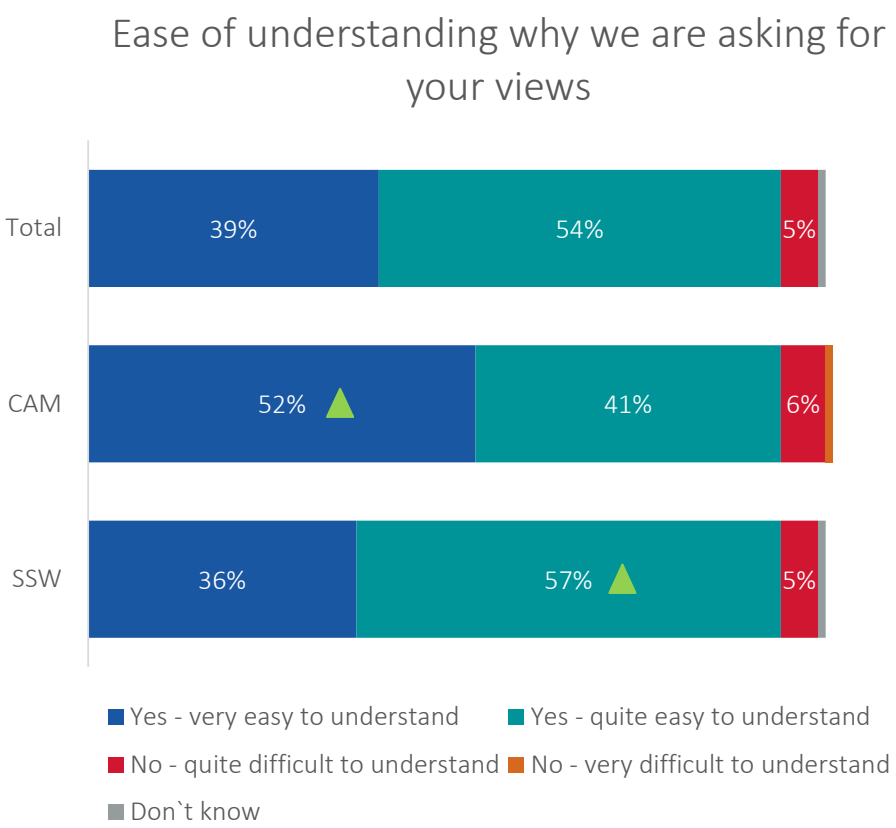
- **Is it what customers want them to do** and what will the impact of their decisions be on customers?
- How much will it **cost** and what impact will this have on **customers' bills**?
- Will it **impact the environment**?
- Will it give them the **water quality** needed?
- Will it give a **reliable supply** over the long-term?

Cambridge Water produces a plan at a company level, but also need to fit into a regional plan for the East of England to ensure its water resource plan is joined up with those of other companies

Accent

Ease of understanding information about WRMP:

The majority of customers agreed that the information they read were easy to understand, 93% overall and also for SSW & CAM



Among those who did not find the content easy to understand, their main concerns were too much information. Some of the comments are below:

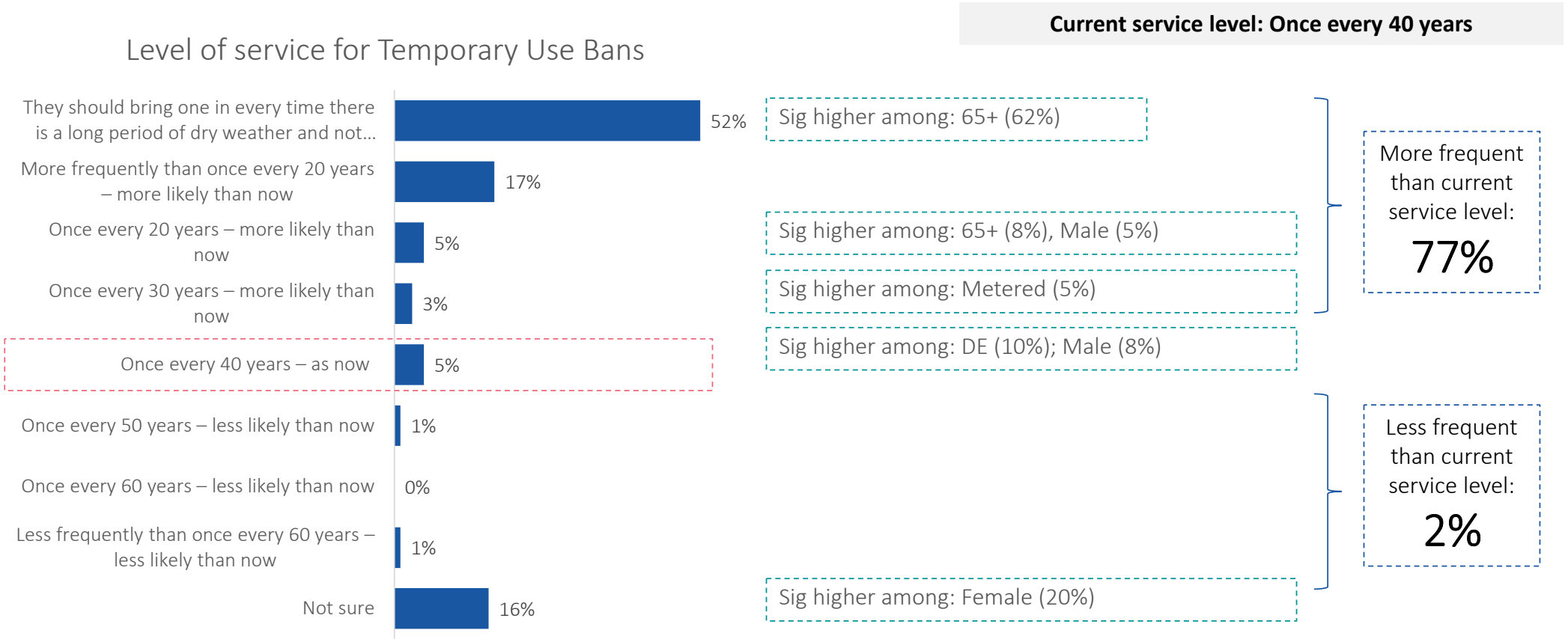
- *Too many options and information to digest*
- *Too much information that was long winded*
- *I think there were too many information, no summary. Some of them were repetitive*
- *There was a lot of information to take in.*
- *It's was very wordy, so you read one thing then there's something else just as complex*

Q28. ONLINE PANEL ONLY Is the information about why South Staffs/ Cambridge Water are asking for your views clear and easy to understand? (n=576)
Q29. What do you find difficult to understand? Please write in as much information as possible

Managing Droughts

Managing droughts – SSW HH:

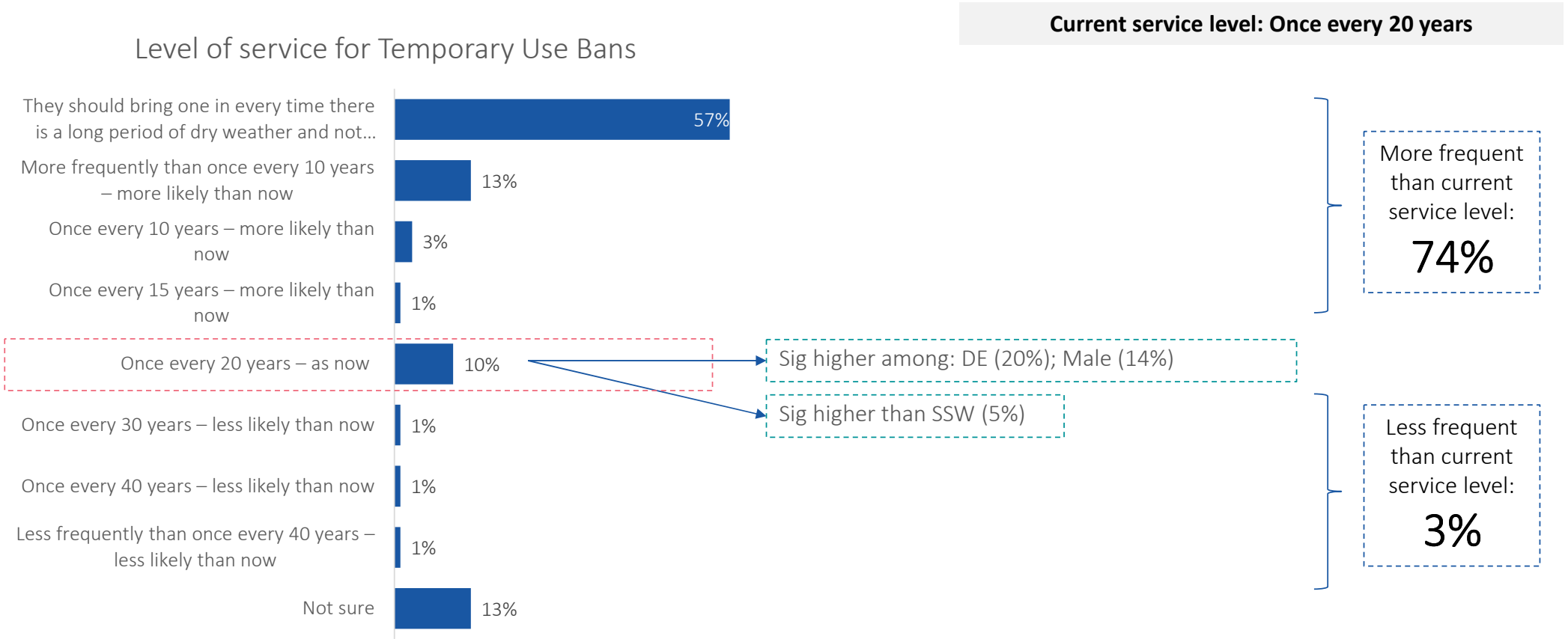
Over half of participants in SSW service area thought the temporary use ban should be introduced every time there is a long period of dry weather…



Q32. What level of service for Temporary Use Bans would you want SSW to plan for in the future? SSW: 887

Managing droughts – CAM HH:

…while this figure is higher in CAM, the difference was not significant. However, significantly more CAM customers selected the option “as now” when compared to SSW

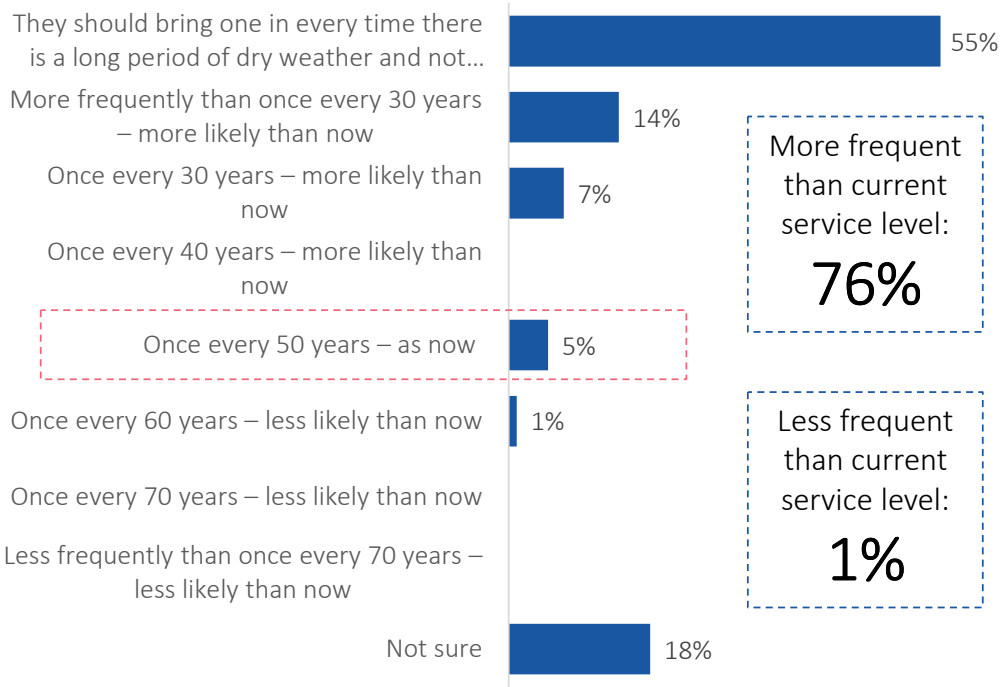


Q32. What level of service for Temporary Use Bans would you want CAM to plan for in the future? CAM: 293

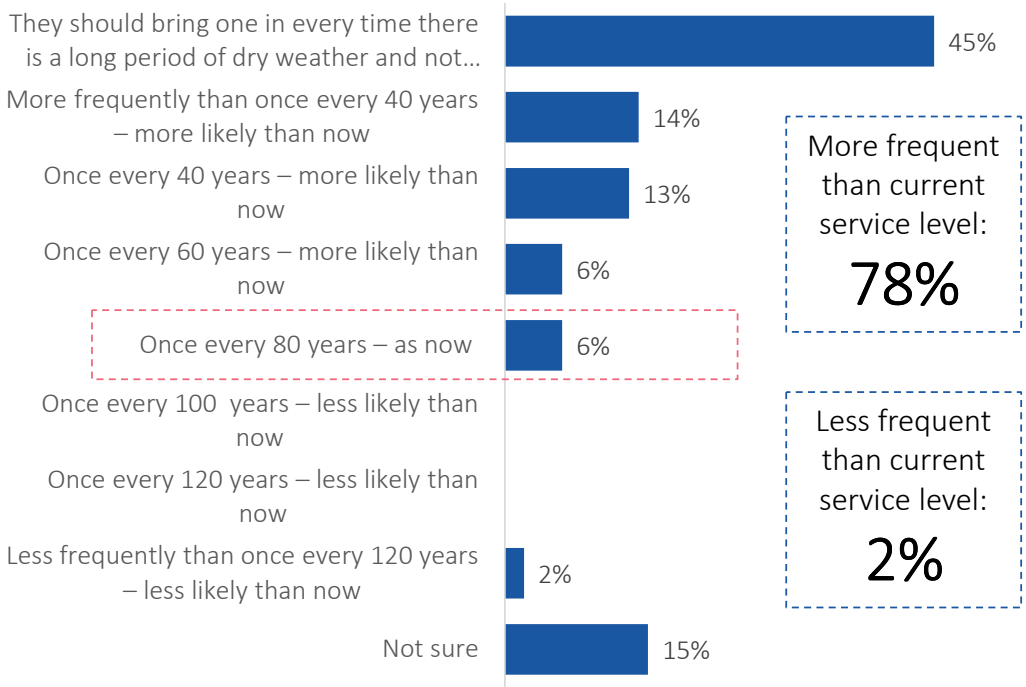
Managing droughts – CAM / SSW NHH:

Less than half of the business sample agreed with bringing out the ban every time there is a long period of dry weather.
No significant differences can be seen between SSW and CAM

Level of service for Non-essential Use Bans- CAM



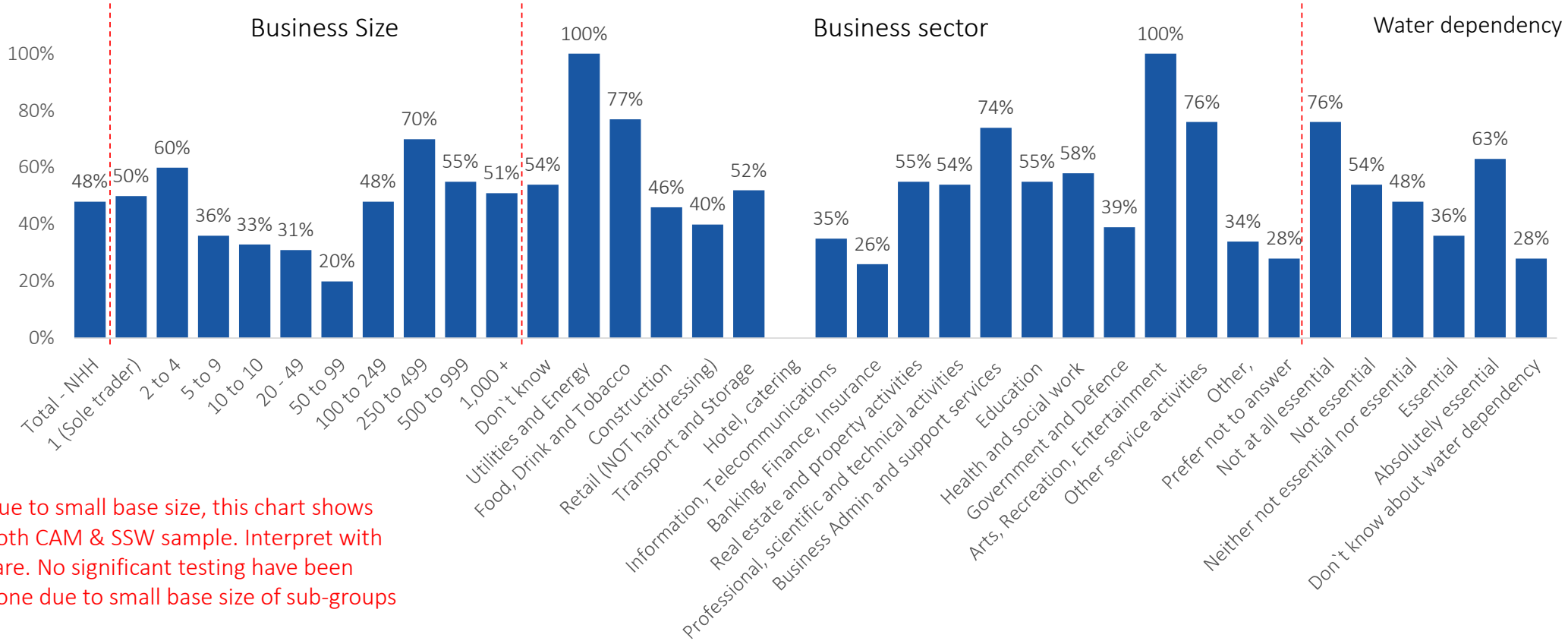
Level of service for Non-essential Use Bans- SSW



Q32. What level of service for Non-Essential Use Bans would you want CAM/SSW to plan for in the future? n= 152, CAM: 46, SSW: 106

Managing droughts – CAM & SSW NHH:

Breakdown of those selected 1st option: having a ban every time there is a long period of dry weather.

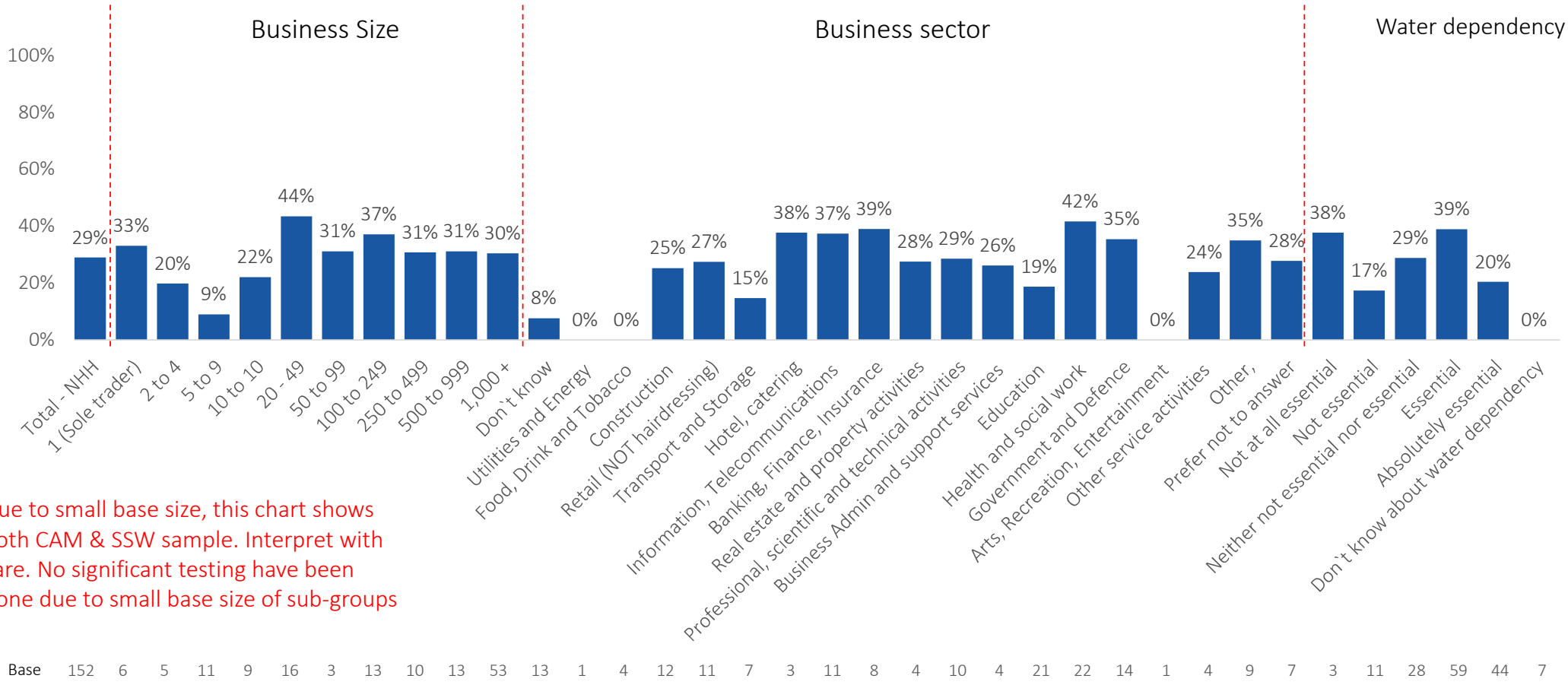


Due to small base size, this chart shows both CAM & SSW sample. Interpret with care. No significant testing have been done due to small base size of sub-groups

Q32. What level of service for Non-Essential Use Bans would you want CAM/SSW to plan for in the future? NHH, n= 152

Managing droughts – CAM & SSW NHH:

Breakdown of those selected options more frequently than now, but not every time there is a long period of dry weather.



Due to small base size, this chart shows both CAM & SSW sample. Interpret with care. No significant testing have been done due to small base size of sub-groups

Base	152	6	5	11	9	16	3	13	10	13	53	13	1	4	12	11	7	3	11	8	4	10	4	21	22	14	1	4	9	7	3	11	28	59	44	7

Accent

Q32. What level of service for Non-Essential Use Bans would you want CAM/SSW to plan for in the future? NHH, n= 152

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *"They should bring one in every time there is a long period of dry weather: a good way to protect the water environment and help ensure supplies are protected in the long-term"*

More important to protect the environment	Safe proof future, protect supply	Not enough water as it is / finite resource	Climate change = more droughts	Helps to change perception/value of water
I think protecting the environment and natural habitats is more important than having a clean car and filling a paddling pool ***(HH, CAM)*** *Because it is an unnecessary use of water to wash cars, use paddling pools etc. Households should use water butts and this water can be used instead of hosepipe* ***(HH, CAM)*** *'We need to conserve water and as long as we have drinking and bathing water other things such as washing cars can wait.* ***(HH, SSW)*** *Washing cars and filling pools not important* ***(HH, SSW)***	*We need to protect the environment for future generations.* ***(HH, CAM)*** *Protecting the environment and our children's future is a priority.* ***(HH, CAM)*** *To protect supplies of water for everyone* *Water is very precious like gas and electric and should be looked after so provision isn't compromised and the world's future is protected .* ***(HH, SSW)*** *It's better to ensure that we will continue to have water even if it is a lower amount, than to run out entirely.* ***(HH, SSW)***	*There is already severe strain on water resources and the plan is for increased population with associated housing/work place footprint. There is not enough water in the Cambridge area already which is having a detrimental effect on the unique chalk streams* ***(HH, CAM)*** *We have to look seriously at our water consumption and make the public aware resources are VERY limited. The public is far too wasteful.* ***(HH, SSW)*** *Customers need to realise that there is not enough water for every human desire and we need to use it wisely and carefully.*	*Climate change will likely cause severe fluctuations to the water supply and frequent water use controls will likely be necessary given the current levels of investment.* ***.(HH, CAM)*** *Climate change is going to make drought more likely and more serious. Customers should expect to use less whenever this happens* ***(SSW)*** *The global response to climate change is not encouraging so the drought/ flood cycle could be very erratic. The most cautious approach is my preference.* ***.(HH, CAM)*** *Because nothing can be predicted, environmental changes.****(HH, CAM)***	*I think a water ban would make people think how they use water (HH, SSW)* *'I think we need to educate people as I see people using hose pipes and leaving them on all night. (****HNN, SSW)*** *'There should be bans to using large volumes of water not just outside but also inside, people need to change the way they approach water consumption.(HH, CAM)*

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *More frequently than once every 10 years - more likely than now (CAM) / More frequently than once every 20 years – more likely than now (SSW)*

Complete ban is undesirable	Demand is rising / not enough water for future	Help to change perception of water	Protect the environment is more important
Constant bans would cause an issue with customers but set out over a few years would probably be more satisfactory (HH, CAM) *Every time there is a long spell of hot weather seems overkill, but also recognise that in a changing climate it's likely that measures may be required more often than in the past. That said, would prefer the leaks to be fixed as a priority! (HH, SSW)* *I don't want them doing it too easily whether the weather is dry, but would understand if it happens every few years as needed (HH, CAM)* *I think they should be used when necessary but not every time as people won't listen if they are used too often (HH, SSW)*	*Demand is rising so it's more likely to need to be put in place at higher water levels than previously, so will happen more often (HH, SSW)* *If water levels are too low to meet demand, we all should contribute to conserving water. (HH, SSW)* *Supplies should be conserved for the future, and not used for people to fill hot tubs, swimming pools etc. I am aware of water waste, and do not want my bills increased every year, to pay for them (NHH, SSW)*	*I think we are seeing more longer dry spells and this will make people think about the water they are using (HH, SSW)* *I don't think a temporary use ban is such a hardship and would help people realise the problem and hopefully to think about their use of water. (HH, CAM)* *If everyone's water gets put to a cap every 3 months people won't take advantage as they would have to ration their water. (HH, CAM)* *No one a ban on their water as it's taken for granted (HH, SSW)* *Putting a ban in and educating people about how they waste water is good. It protects the future (HH, SSW)*	*Protecting the environment and water supplies is more important! (HH, CAM)* *Surely saving water is more important than watering a garden for example (HH. CAM)*

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *Once every 10 years – more likely than now (CAM) / Once every 20 years – more likely than now (SSW)*

Prepare for climate change/ extreme situations	Prepare perception	Ban shouldn't be the norm	An average - balance option (SSW)
we must be able to cover normal situations but extreme conditions have to be catered for (HH, SSW) *The environment is important. If we don't look after it then we won't have a decision to save anything in the longer term (HH, CAM)* *Because of climate change (HH, SSW)*	*To get people used to it and thinking about saving water and about future generations (HH, CAM)*	*It should not become the norm, but be planned for on a more regular basis than in the past. (HH, SSW)* *If it is essential and necessary to ensure customer supplies it should be bought in but only for as short a time as possible. Lack of domestic water to houses would be far worse than being unable to clean the car or use a hose (HH, SSW)* *Nonessential water needs can be delayed, if otherwise huge costs involved (HH, CAM)*	*an average based on keeping supplies and cost in check but not impacting people (HH, SSW)* *Climate change slower overall. 20 years seems a reasonable assessment as far as I am concerned. (HH, SSW)* *Climate change slower overall. 20 years seems a reasonable assessment as far as I am concerned. (HH, SSW)*

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *Once every 15 years – more likely than now (CAM) / Once every 30 years – more likely than now (SSW)*

Climate change will bring drier weather	Increase in demand	Not needed too often	Requires better infrastructure
The world is warming, so climate extremes are to be expected more frequently. (HH, CAM) *Because with climate change I think it will be necessary to do this more often to maintain essential supplies (HH, CAM)* *Global warming and climate change (HH, SSW)* *The earth is getting warmer so drought is more likely to happen (HH, SSW)* *Climate change may make it inevitable that bans are more frequent in the future. (HH, CAM)*	*More houses , more pressure on water supplier , likely to have more problems (HH, CAM)* *More people, warmer whether (HH, SSW)*	*I don't think there's a real need to do it more frequently. (HH, SSW)*	*Temporary bans are annoying, are ignored by many, and should not be regarded a "normal" - when proper planning and infrastructure investment should mean that they are only needed for exceptional summers.(HH, CAM)*

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *Once every 20 years – as now (CAM)/ Once every 40 years – as now (SSW)*

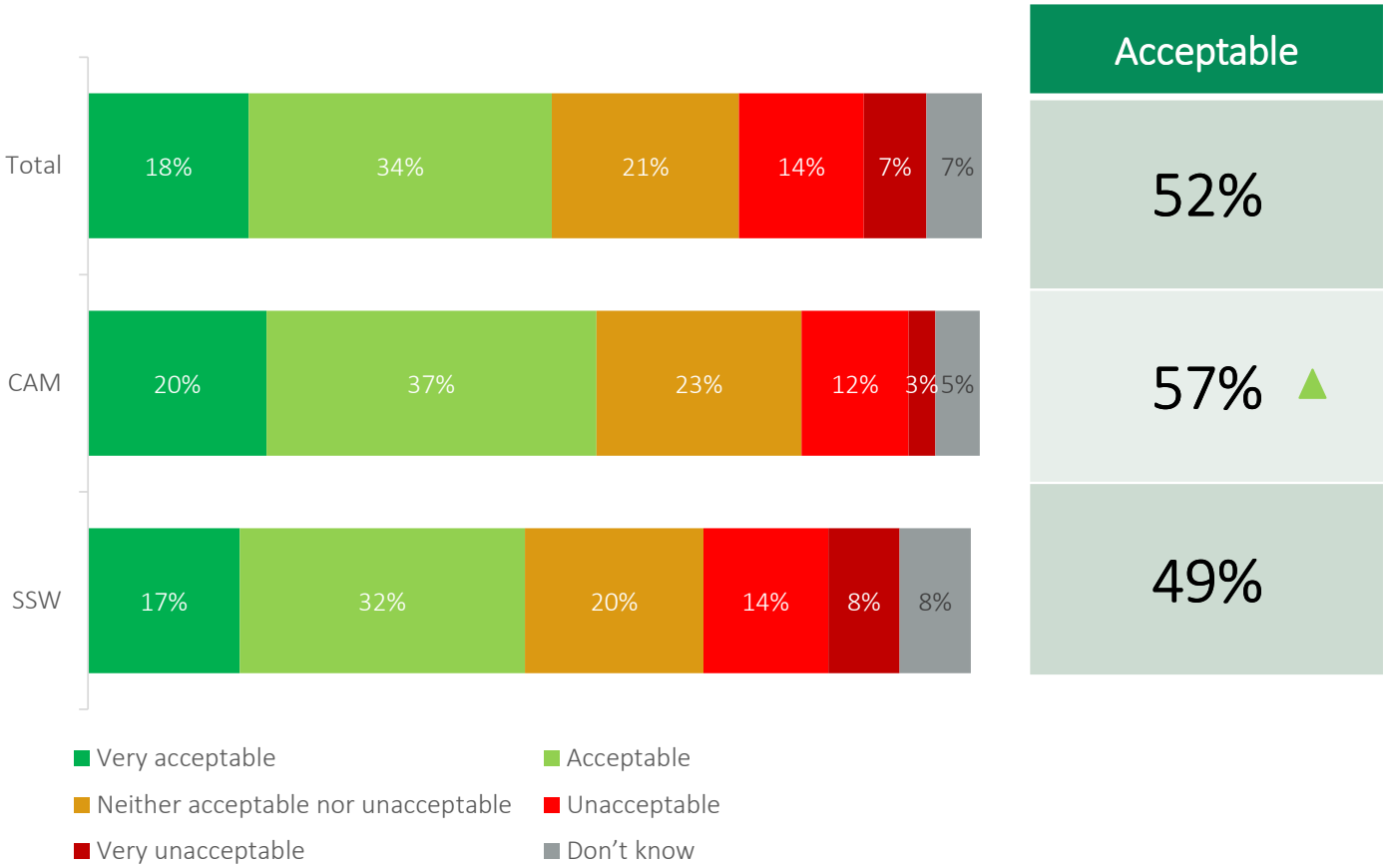
Need solutions to keep the same as now	20 years is a good gap (CAM)	Extreme drought is rare	Don't fix what's not broken
If we use water more responsibly in the years to come, then maybe the bans can be kept at the same level as now. (HH, CAM) *You seem to be managing the control of water very efficiently as bans are a rarity so continue as is in my opinion (HH, CAM)* *As long as people avoid wasting water I don't think it would be a problem (HH, SSW)* *I am not sure how to answer this question. I feel that people should be encouraged to look after the environment during the summer months. The midlands has a lot of rivers and canals that support wildlife. They are more important than washing a car or filling a paddling pool. Educating your customers and the use of social media could help in drier conditions (HH, SSW)*	*20 year is good balance (HH, CAM)* *20 years seems right (HH, CAM)* *An occasional ban, once every twenty years, can be coped with (HH, CAM)*	*I am assuming that conditions will be similar to now over the next 40 years. (HH, SSW)* *However hotter summers get. Sustained droughts like in 1976 are still extremely rare (HH, SSW)*	*Don't change it if it works (HH, SSW)* *Don't change unless absolutely necessary. (HH, CAM)*

Level of service for Temporary Use Bans: (HH only) Key reasons for selecting *Less than now (CAM) /Less than now (SSW)*

Water should be available at all time	Customers have to pay regardless
Water is essential to life, it should be available to all for all of the time. (HH, CAM) *having water is essential for hygiene reasons. (HH, SSW)* *Water is a necessity. It only costs £3 according to adverts a month to get water to Africa. I m paying a lot more (HH, SSW)* *Who wants to be without a good water supply? (HH, CAM)* *Because people really need water and it is used for many purposes like having a bath and cooking, to painting and gardening. (HH, SSW)*	*So much water there shouldn't be a drought plus you get paid to supply regardless, not like you will refund if there was a water shortage (HH, SSW)* *Because we don't want to have a shortage of water for any activity when it's being paid for by the customer (HH, SSW)*

Acceptability of restriction risks happening once every 200 years:

Overall, around half of interviewed customers find the current level of drought restrictions acceptable, this figure is significantly higher among CAM customers

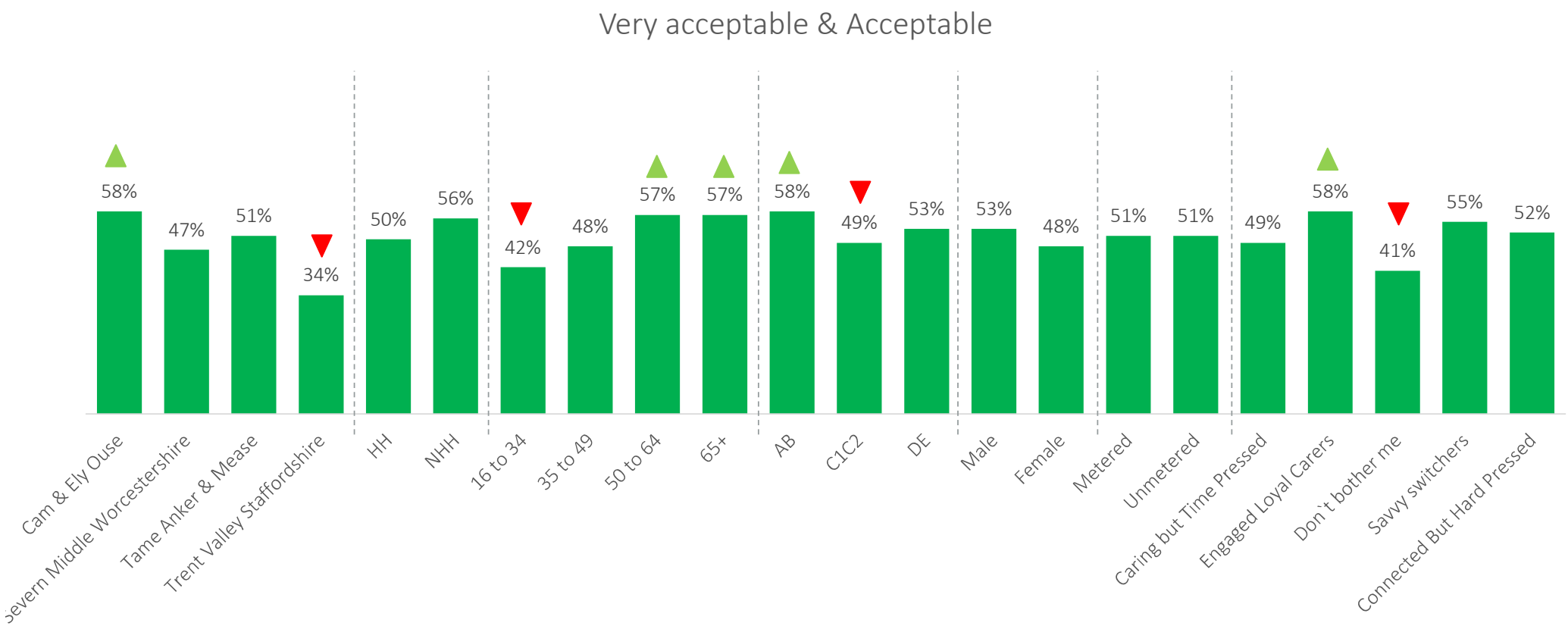


Q33. At present, water companies are planning for the likelihood of an extreme drought that might involve restrictions (such as the deployment of mobile water tanks and standpipes in the street for people to queue at for drinking water) happening once every 200 years. How acceptable do you find this level of risk? (n=1,180, CAM: 293, SSW: 887)

Sig higher or lower than at least one attribute in the same category

Accent

Acceptability of risks happening once every 200 years in subgroups - demographics



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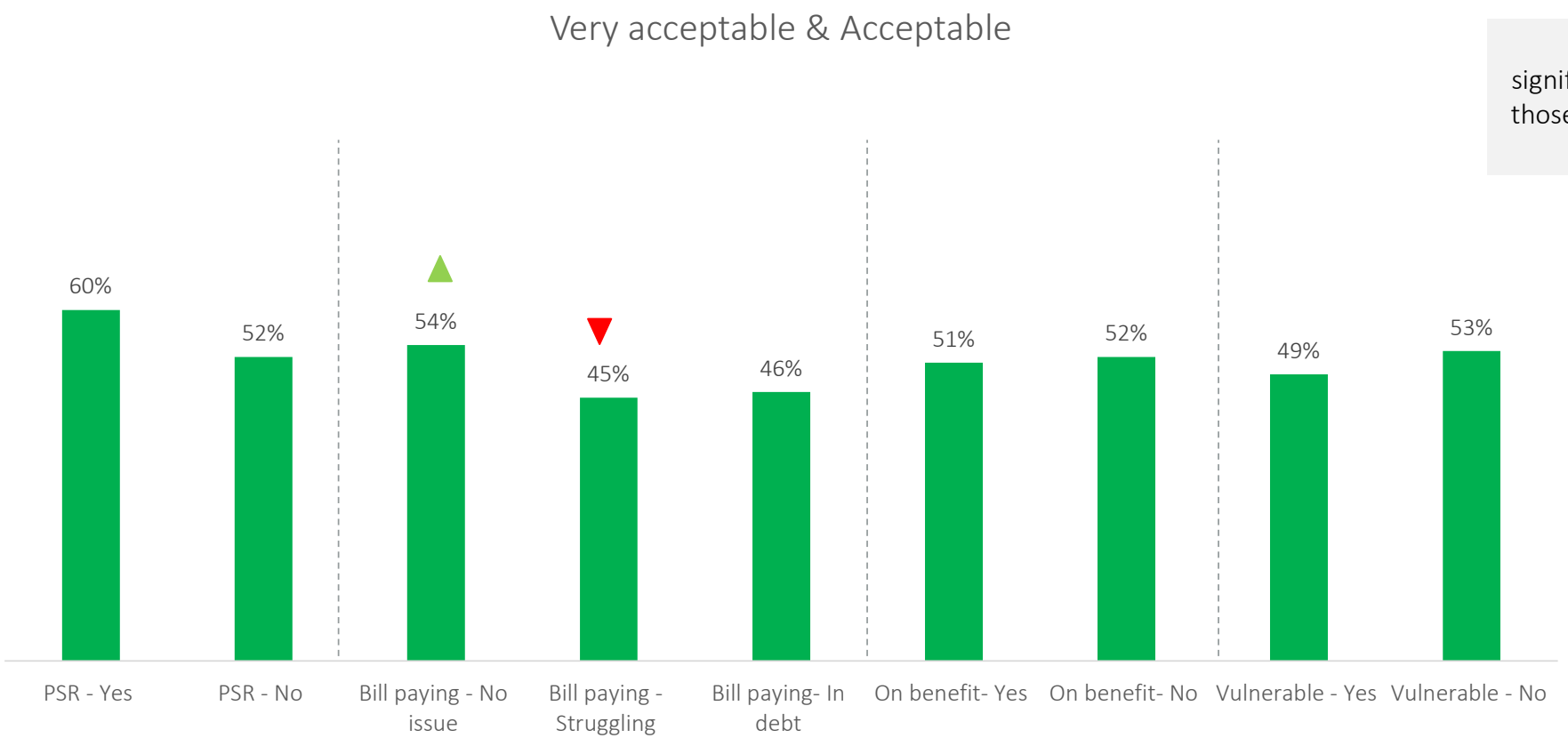
Sig higher or lower than at least one attribute in the same category

Accent

Acceptability of risks happening once every 200 years in subgroups – vulnerability status



Acceptability is significantly lower among those who are struggle to pay bills

Q33. At present, water companies are planning for the likelihood of an extreme drought that might involve restrictions (such as the deployment of mobile water tanks and standpipes in the street for people to queue at for drinking water) happening once every 200 years. How acceptable do you find this level of risk?

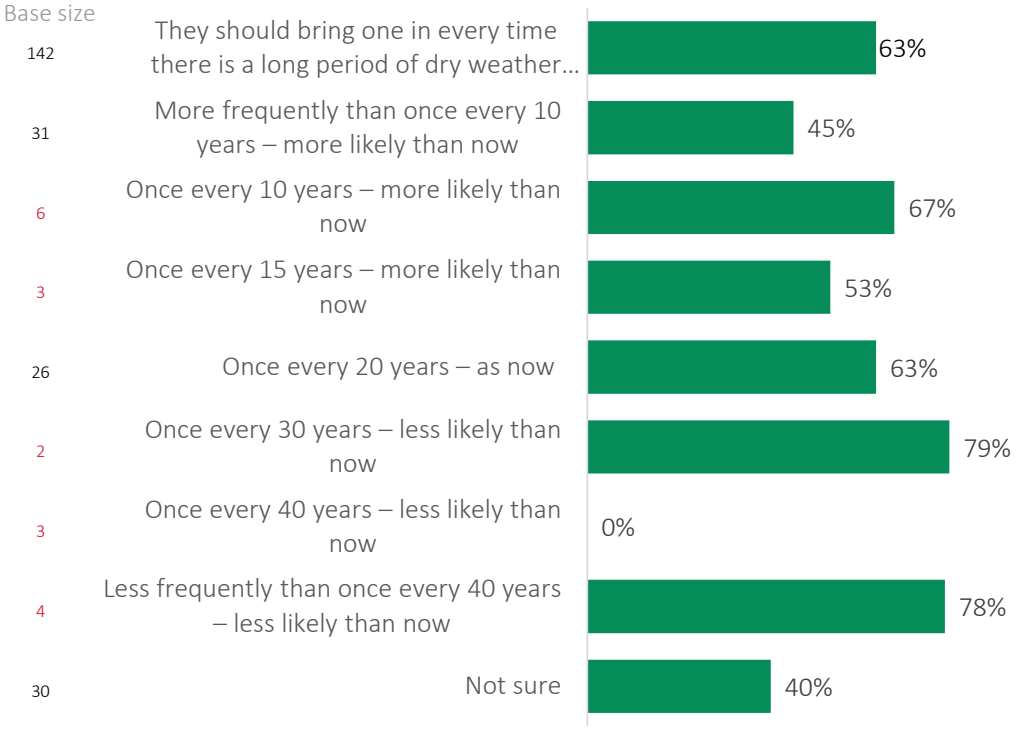
Sig higher or lower than at least one attribute in the same category

Accent

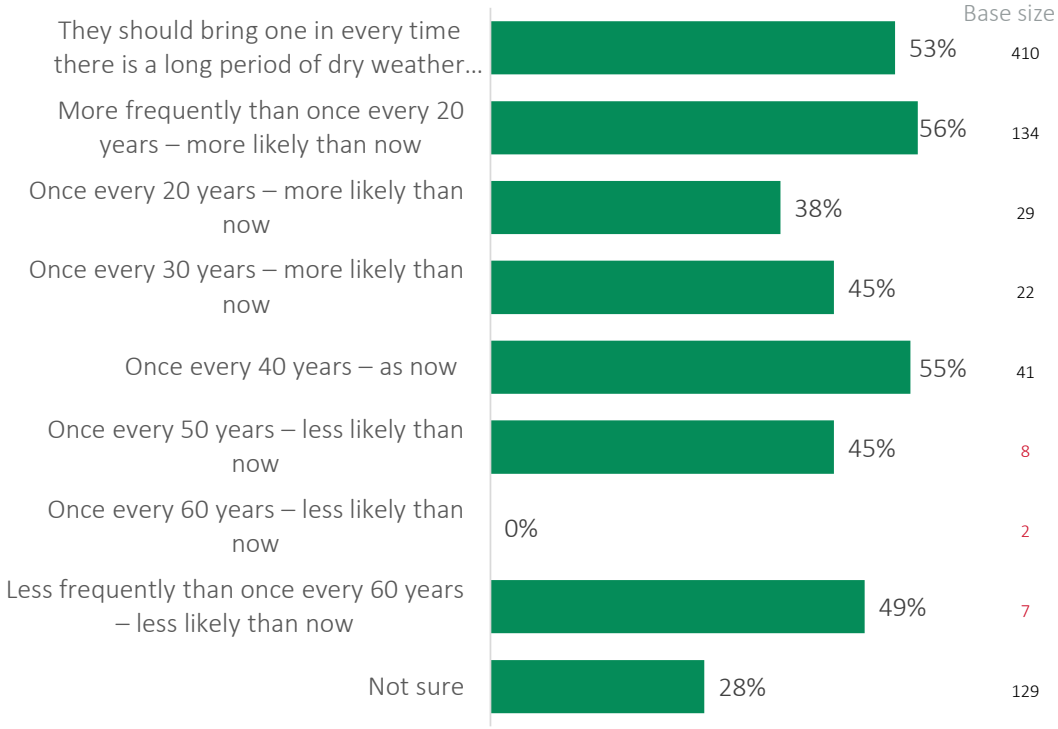
Acceptability of restriction risks happening once every 200 years – split by response to temporary use ban service level preference – HH: Support for level of TUBs does not directly relate to the acceptability of current restriction risk. Those who selected a more frequent TUBs band do not show a lower level of acceptability towards the risk of restriction occurring once very 200 years

NOTE: acceptability asked on current risk whilst level of service asked about future planning – this might explain the potentially counter intuitive outcome

Acceptability of restriction risks happening once every 200 years – by temporary use ban support – CAM HH



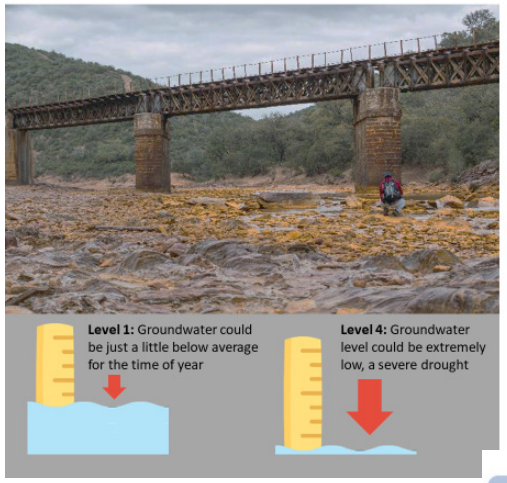
Acceptability of restriction risks happening once every 200 years – by temporary use ban support – SSW HH



Q33. At present, water companies are planning for the likelihood of an extreme drought that might involve restrictions (such as the deployment of mobile water tanks and standpipes in the street for people to queue at for drinking water) happening once every 200 years. How acceptable do you find this level of risk? Q32. What level of service for Non-Essential Use Bans would you want CAM/SSW to plan for in the future? Low base size in red

Accent

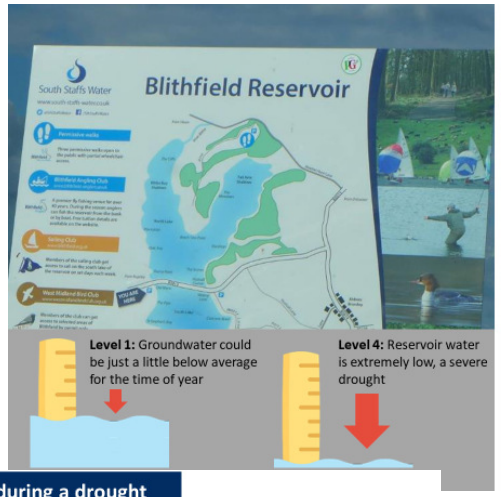
Customers were then shown information about how droughts are defined and how water supplies are managed before being asked their views on what actions they would like South Staffs/Cambridge Water to take in the future.



Cambridge Water looks at groundwater levels to work out how severe a drought is. The lower the level, the more severe the drought – i.e. from:

- **Level 1** (groundwater could be just a little below average for the time of year); to
- **Level 4** (groundwater level could be extremely low, a severe drought)

Your water company also looks at the level of water compared to what it normally is at that time of year. So, a reservoir or underground aquifer that is 80% full in July might be good, but in February this may gave them cause for concern as they aren't fully stocked up ready to support the drier summer period ahead when typically more water is used by customers



South Staffs Water looks at levels in its Blithfield Reservoir to work out how severe a drought is. The lower the level, the more severe the drought – i.e. from:

- from **Level 1** (reservoir water level could be a little low); to
- **Level 4** (reservoir water is extremely low, a severe drought)

Your water company also looks at the level of water compared to what it normally is at that time of year. So, a reservoir or underground aquifer that is 80% full in July might be good, but in February this may gave them cause for concern as they aren't fully stocked up ready to support the drier summer period ahead when typically more water is used by customers

Reducing water use during a drought

Level 1 drought, water companies tell customers about the drought and encourage them to use less water on non-essential uses - e.g. cleaning your windows
As droughts get more severe, water companies consider imposing restrictions on how their customers use water. The more severe the drought, the more severe the restrictions that are needed

Level 2 drought, water companies consider using 'temporary use bans'. These used to be called 'hosepipe bans' but the name was changed because the restrictions aren't only about hosepipes. They restrict non-essential water use at home, like filling up paddling pool or hot tub and using a hosepipe to water the garden, wash a car, wash a patio

Level 3 drought, water companies consider using 'non-essential use bans' which means that businesses can't use water for activities like cleaning windows or watering grounds. They also restrict water use in businesses such as swimming pools, car washes, and garden centres

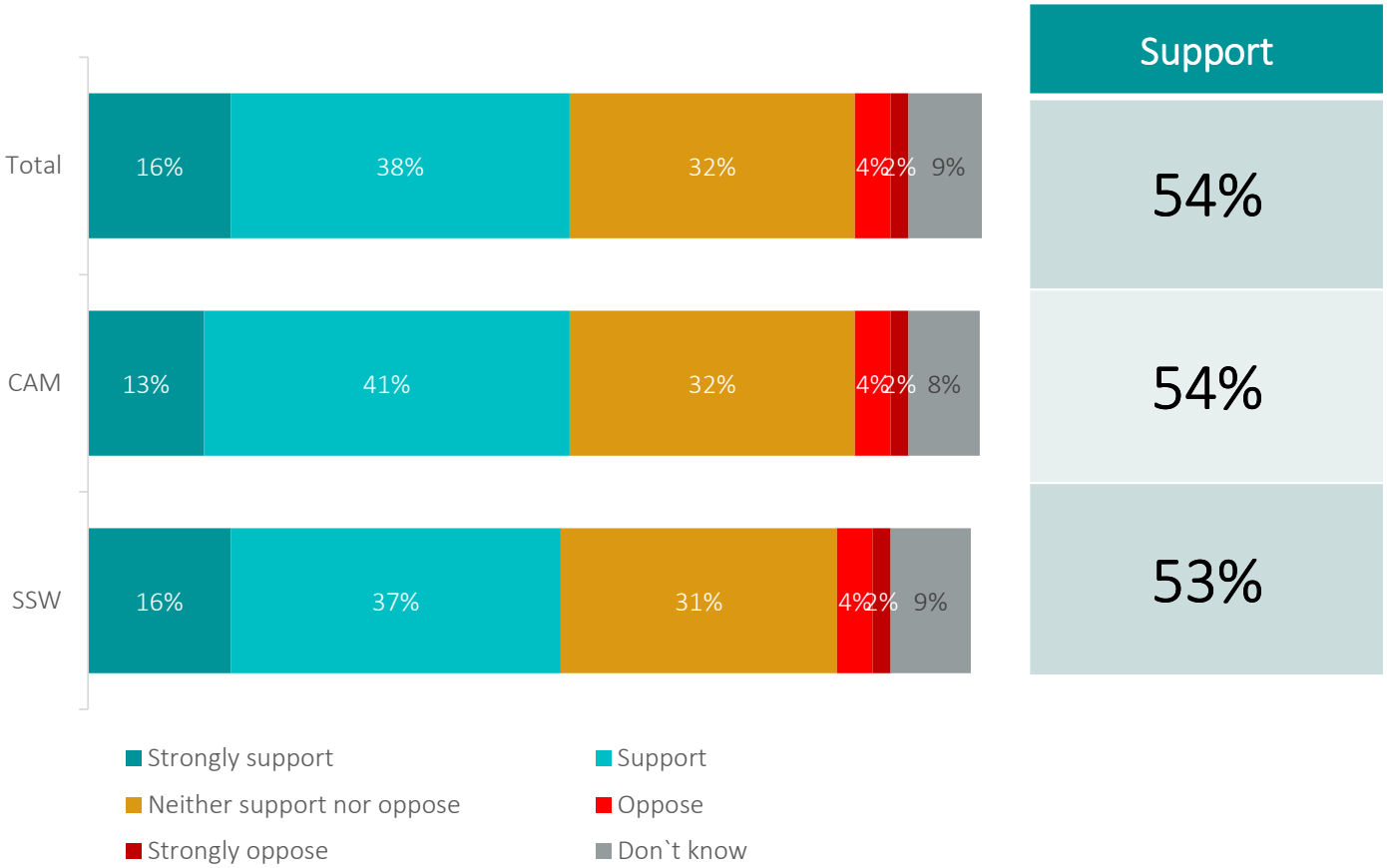
Level 4 severe drought, water companies consider using 'emergency drought orders' to substantially reduce water use. They could use standpipes (where people have to get their water from standpipes in the street; vulnerable customers receive bottled water drops) or rota cuts (people only being able to use water in their homes on, say, alternate days). All non-essential businesses (e.g. leisure, some shops) would likely need to close as water would not be supplied to them

Water companies need to apply to the Government for permission to use level 4 restrictions. And they would also look to use support from the government (such as the army) and other water companies to make sure all customers had a supply of clean drinking water for essential uses

Accent

Support for the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040:

Around half support the suggestion, no significant differences among 2 service regions



Support
54%
54%
53%

Looking at the breakdown of acceptability & support levels in sub-groups, there is a consistent pattern of specific groups accepting & supporting the proposals. Customers who accepted the risks of water restriction happening once every 200 years in subgroups are more likely to also support the target to move the need for rota cuts & standpipes to be used to once every 500 years by 2040.

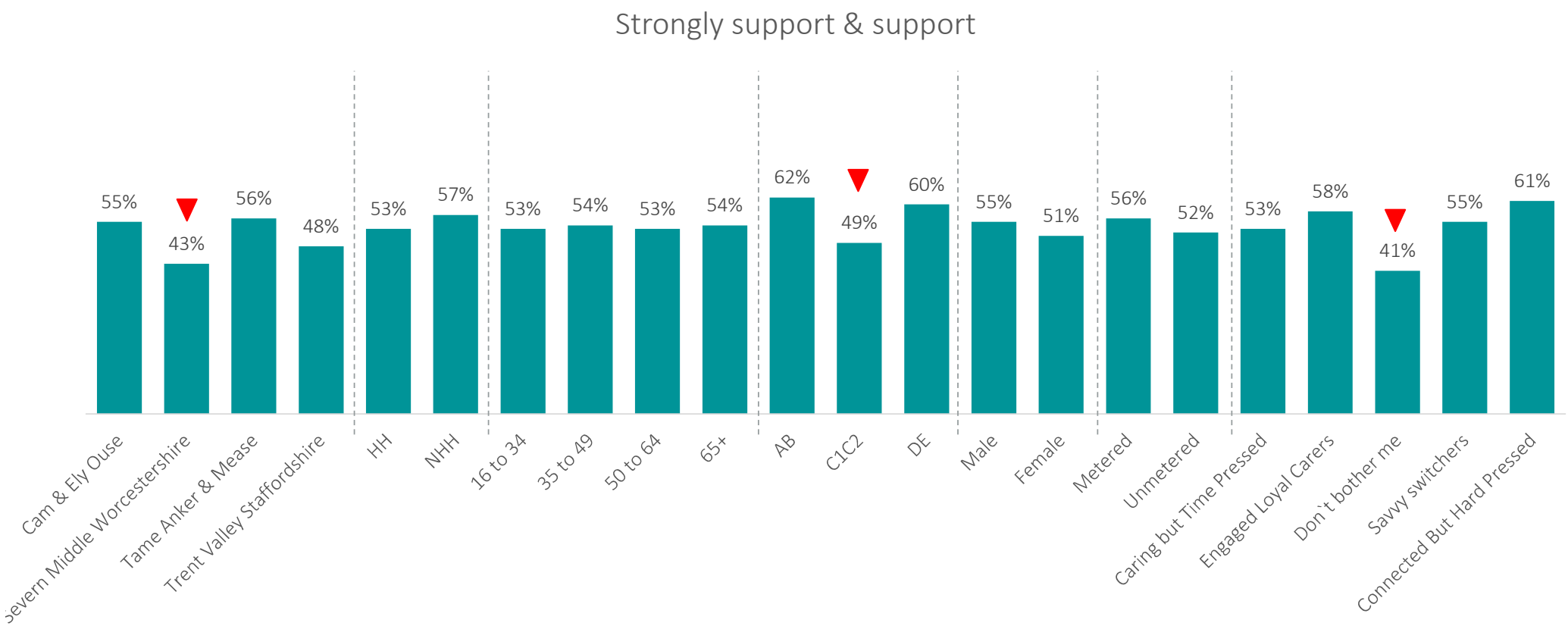
No significant differences can be seen between HH and NHH, very little significant differences can be seen across the board (as shown in the next slide).

Q34. How strongly do you support or oppose the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040? (n=1,180, CAM: 293, SSW: 887)

Sig higher or lower than at least one attribute in the same category

Accent

Support for the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040 – sub groups

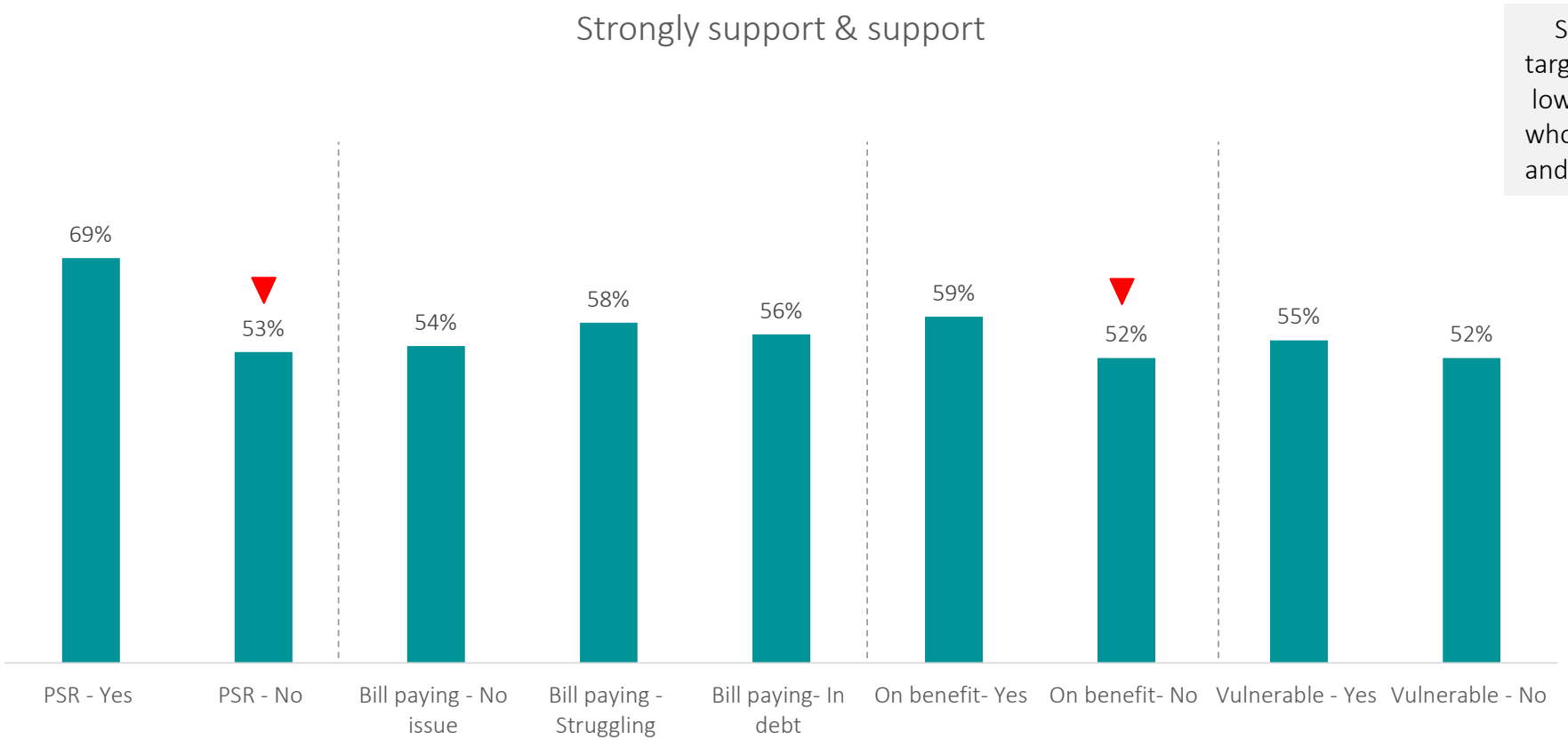


Q34. How strongly do you support or oppose the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040?

Sig higher or lower than at least one attribute in the same category

Accent

Support for the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040 – vulnerability status



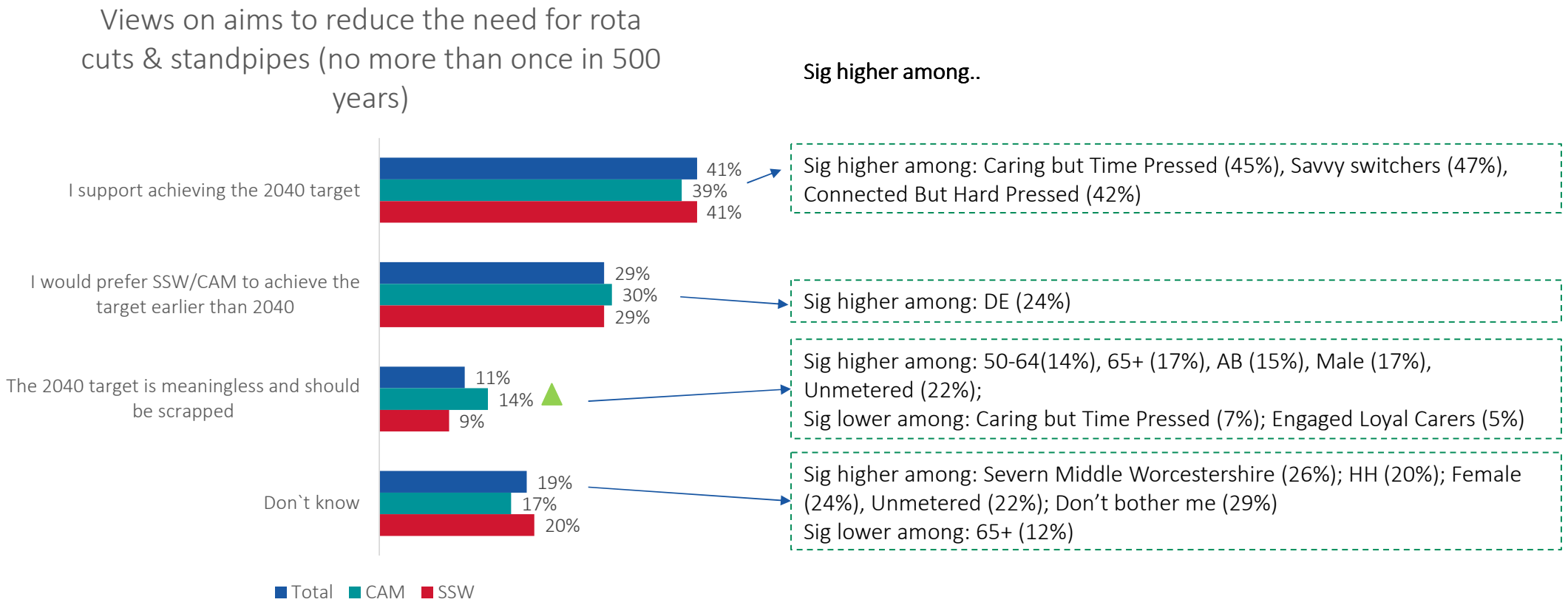
Support for the target is significantly lower among those who are NOT on PSR and NOT on benefits

Q34. How strongly do you support or oppose the target reducing the need for rota cuts and standpipes to be used to no more than once in every 500 years on average by 2040?

Sig higher or lower than at least one attribute in the same category

Accent

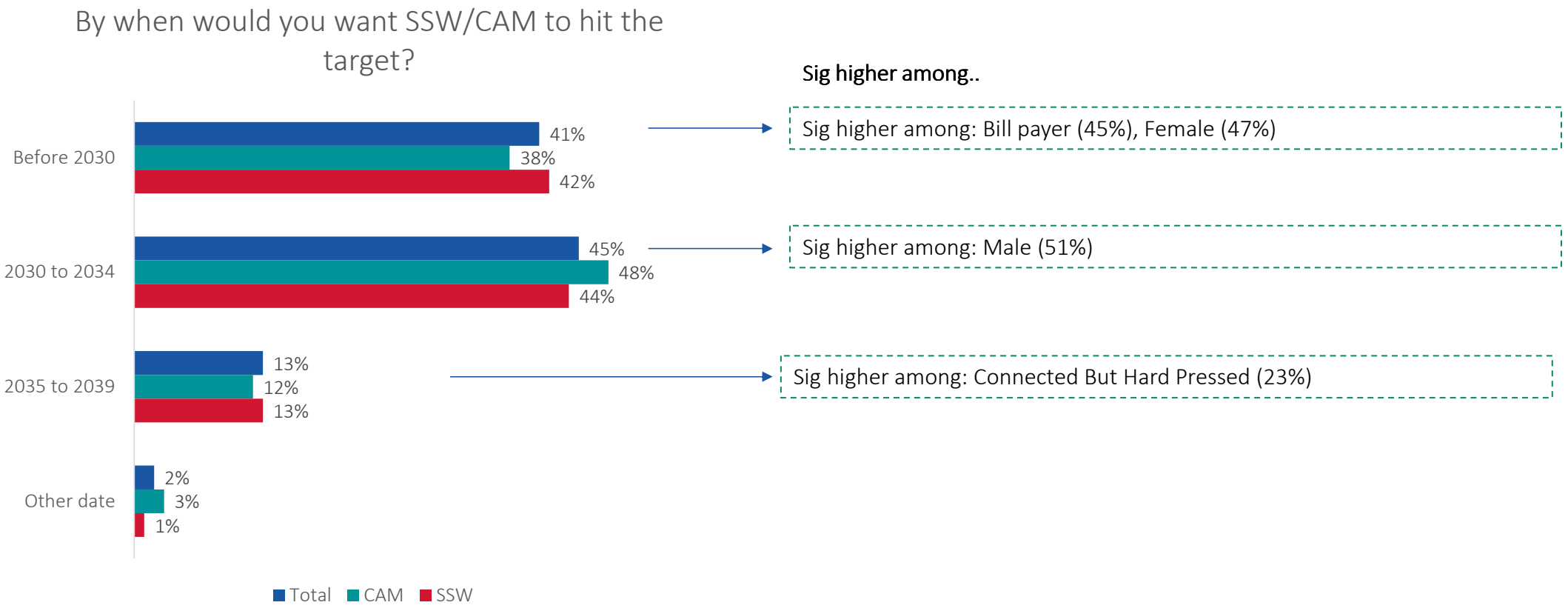
Support level for Aim to reduce the need for rota cuts & standpipes no more than once in every 500 years: Overall, 2 in 5 supported achieving the 2040 target, 1 in 5 was undecided, and 1 in 10 thought the target was meaningless (this figure is significantly higher in CAM)



Q35. South Staffs/Cambridge Water could aim to reduce the need for rota cuts and standpipes no more than once in every 500 years by 2040 more quickly. Which of the following most closely represents your view
(n= 1,180, CAM: 293, SSW: 887)

Accent

Those who would prefer South Staffs/Cambridge Water to achieve the target earlier than 2040: Overall, 45% voted for a target between 2030 and 2034, and similar proportion (41%) voted for a target before 2030

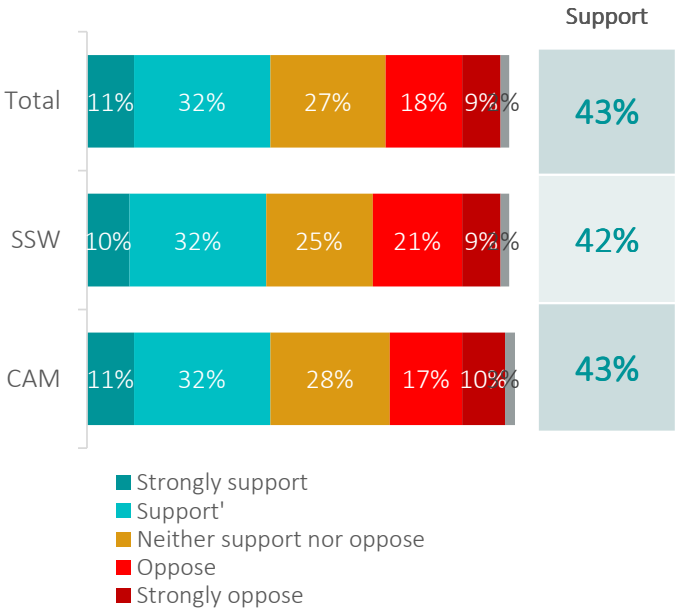


Q36. By when would you want South Staffs/Cambridge Water to hit the target? Base: Those who would prefer South Staffs/Cambridge Water to achieve the target earlier than 2040 (n= 347, CAM: 87, SSW: 259)

Support or oppose the potential ways of reducing customer demand for water:

Highest level of support can be seen for the use of temporary bans every summer where the amount of rainfall is well below average. Overall, no significant differences between CAM & SSW

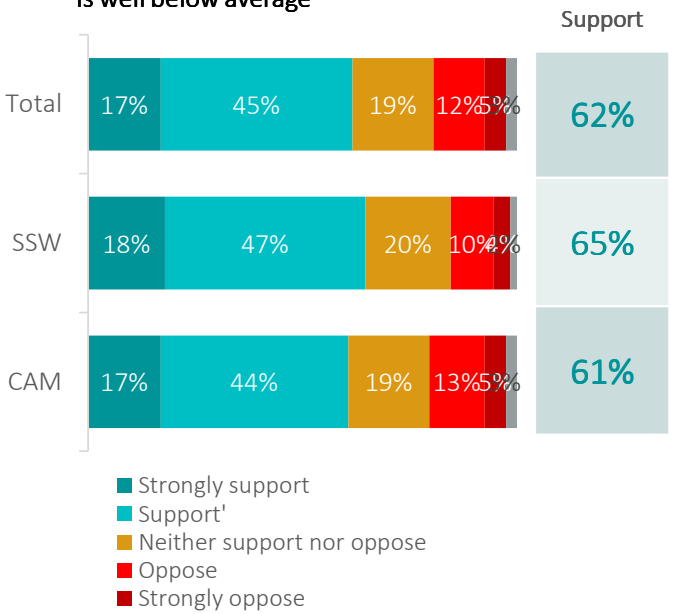
The use of temporary/non-essential use bans every summer



Sig lower/higher:

- Significantly lower among 18-34 (32%), Don't bother me (23%)
- Significantly higher among Engaged Loyal Carers (61%)

The use of temporary/non-essential use bans every summer during years where the amount of rainfall is well below average

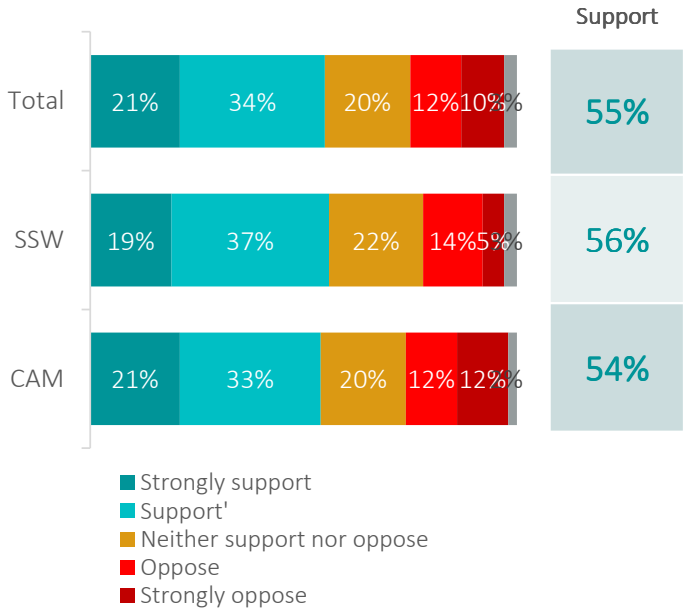


Sig lower/higher:

-Significantly lower among 18-34 (52%), Male (59%), Metered (57%), Don't bother me (39%)

-Significantly higher among Engaged Loyal Carers (78%), 65+ (69%)

Bringing in higher charges for customers who use a lot of water during a period of drought



Sig lower/higher:

- Severn Middle Worcestershire (44%), 18-34 (46%), Don't bother me (37%)
- Significantly higher among Engaged Loyal Carers (67%), 65+ (66%)

Accent

Q37. How strongly do you support or oppose the following potential ways of reducing customer demand for water (n= 1,180, CAM: 293, SSW: 887)

Support or oppose the potential ways of reducing customer demand for water:

The use of temporary/non-essential use bans every summer

- Those that supported this proposal:

It discourage those who use a lot of water

People need to be made aware of the problem we face with water shortages and not be able to water lawns or use power washers etc

As previously stated, some people waste water with sprinklers on all night, even flouting a ban, so charge them more or fine them.

It might discourage those who use a lot of water when it is scarce

- Those that opposed this proposal:

It's not customers' responsibility

If the water company cannot provide necessary supplies of water in the summer it should be nationalised. What other job does a water company have? Shareholders no doubt think it's purpose is solely to benefit themselves.

it makes us sound like we are a 3rd world country , we are a island invest in desalination plants to top up water supplies

Water companies should plan ahead to achieve this goal

A ban every summer is too much / need better solutions

There is no reason to ban if there is no drought, but if there is a drought measures should be taken to reduce water usage.

Temporary bans aren't affective a long term solution must be implemented

Support or oppose the potential ways of reducing customer demand for water:

The use of temporary/non-essential use bans every summer during years where the amount of rainfall is well below average

- Those that supported this proposal:

Water should be saved for essential reasons

To conserve water for essential use such as drinking, washing etc

We should be using water for essential purposes only when there is well below average rainfall rather than wasting it for non-essential use

If there's less water available than usual, people shouldn't be wasting it.

To make sure that what we have is enough for essential use.

- Those that opposed this proposal:

It's not customers' responsibility

The ban should be based on the ability of the water company to supply water and not on the immediate conditions. It may have been a wet spring and there are plenty of water reserves.

Addition cost/ time

Cause too much bureaucracy

Due to the many different reasons water bills may be high

Support or oppose the potential ways of reducing customer demand for water:

Bringing in higher charges for customers who use a lot of water during a period of drought

- Those that supported this proposal:

Help customers be mindful of water usage

To make people think before they use excessive water usage during droughts.

It needs to be brought home to people exactly what they are doing by being so selfish and not thinking about others and the future. Making these people pay more should help to make them use water more sensibly.

Each individual needs to act to protect the planet. We have to stop relying on the goodwill of a few while others waste resources and just don't care. Everyone needs to take responsibility.

To discourage wasteful use of water, although it would have to be carefully thought through

- Those that opposed this proposal:

Need to consider customers' situations

It would need to depend on the particular circumstances before automatic higher charges are bought in in this situation

Some people have bigger families than others

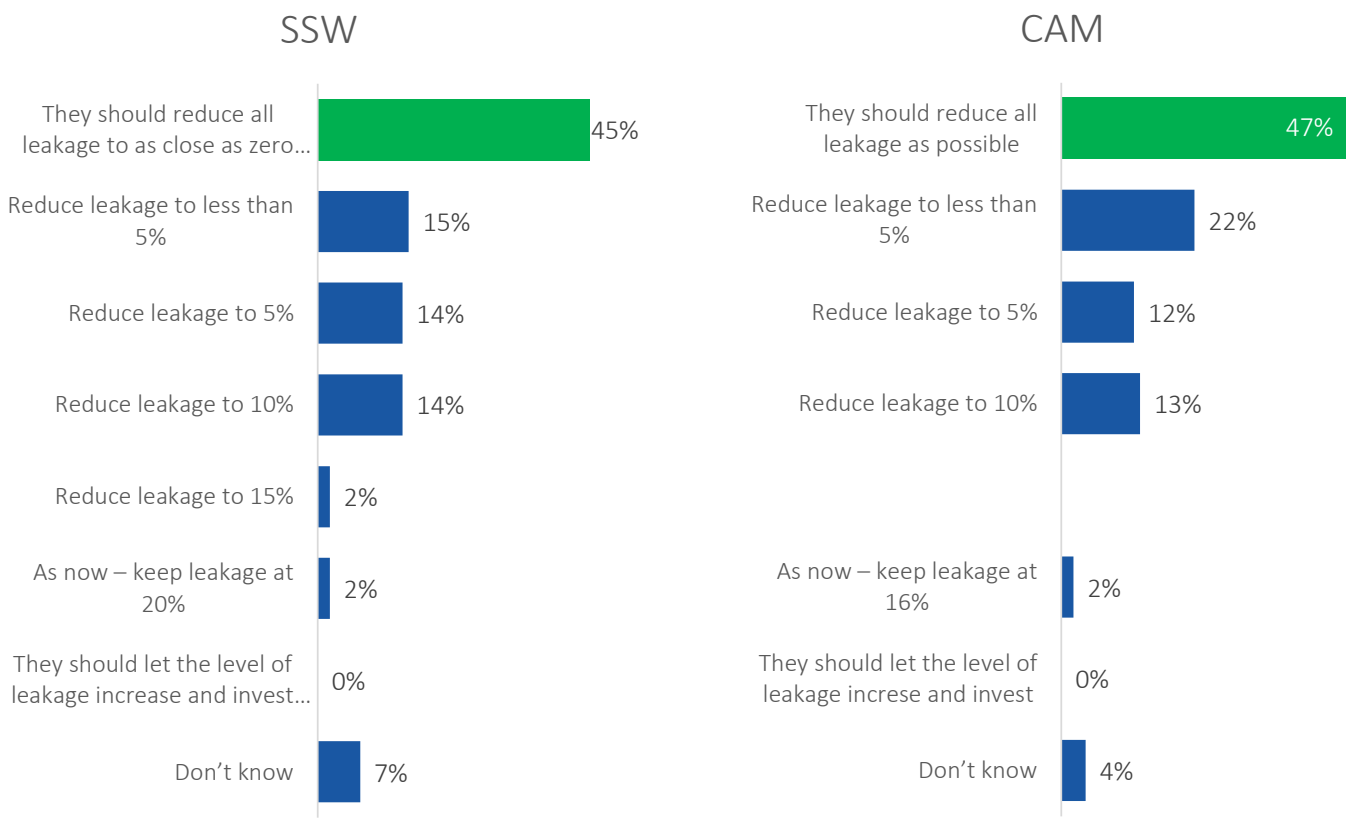
People already pay according to usage if metered. Larger families would be penalised as they would obviously use more water than say, a single person or couple…. That is unfair. Why not encourage more homes to have a water meter instead so that they have control over their bill and would take more notice of their water usage .

Because some households are bigger than others so they will need to use more water

Leakage Ambition

Uninformed: Level of leakages planning

Overall, 46% of customers voted for a reduction in all leakages as soon as possible. This figure is slightly higher among CAM customers than SSW, but not significant. No significant differences seen between HH and NHH customers



Those who select the 1st option agued that loosing water is not acceptable.

- *Water is precious. Too lose this amount each day due to leaks is just not acceptable. Leaks should be fixed as quickly as possible*
- *Leakage is wasteful and should be prevented as much as possible*
- *Leaks are left for months without repair. I am charged for every drop. Not acceptable.*

Those who select the other options (less than 5%, to 5%, 10%, 15% etc.) thought a zero target is impossible or would be too costly:

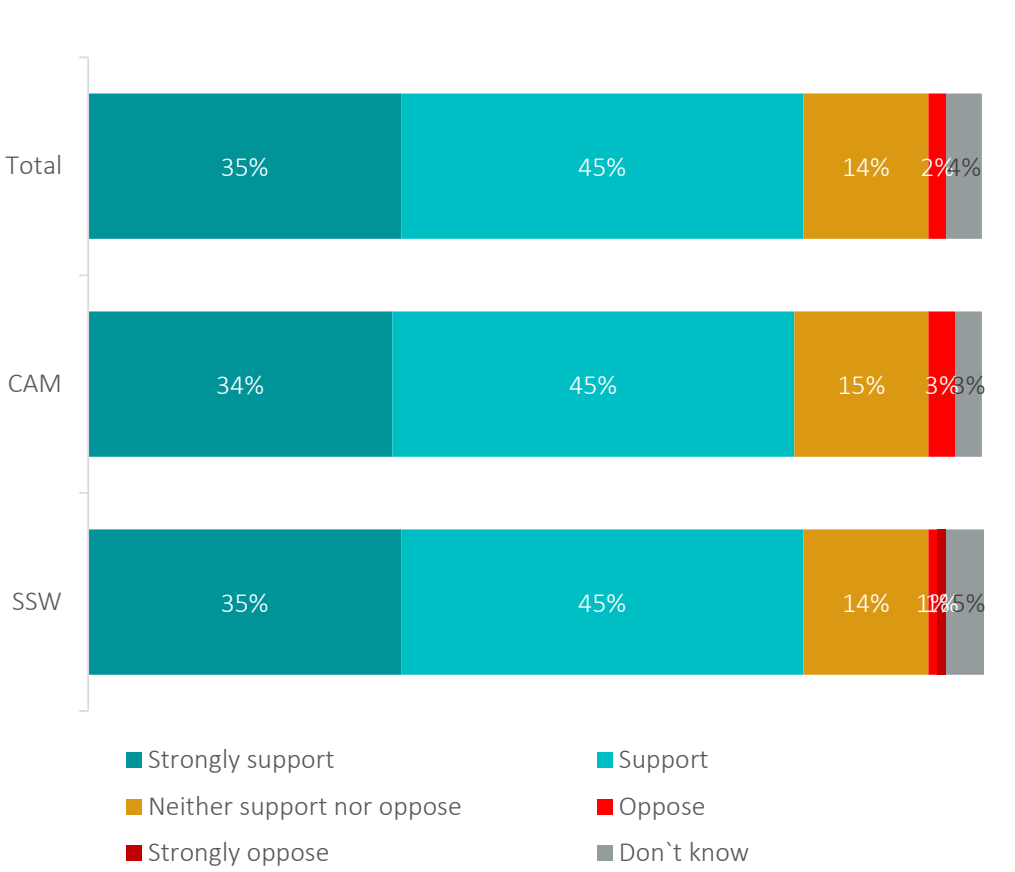
- *There is a cost to replacing damaged pipes so to achieve a zero leakage figure would be beyond the ability of the water company to sustain.*
- *Current leakage levels feel astonishingly high. Zero is impossible to achieve and it would be unaffordable to try.*
- *Waste of any sort should be removed up to cost effective levels. 0% wastage would not be possible without extremely high spending*

Accent

Q39. Before we tell you more, what level of leakage would you want South Staffs/Cambridge Water to plan for in the future? (n= 574, CAM: 133, SSW: 441)

Support or oppose national target for reducing leakage:

The majority of customers supported the national target for reducing leakages, no significant differences between CAM and SSW.



Support
80%
79%
80%

Sig lower among:
- 18-34 (69%),
- DE (74%),
- Don't bother me (64%)

SSW: This would mean that the rate of leakage by 2050 would be 10% of water produced lost each day, compared to 20% last year

CAM: This would mean that the rate of leakage by 2050 would be 8% of water produced lost each day, compared to the 16% last year

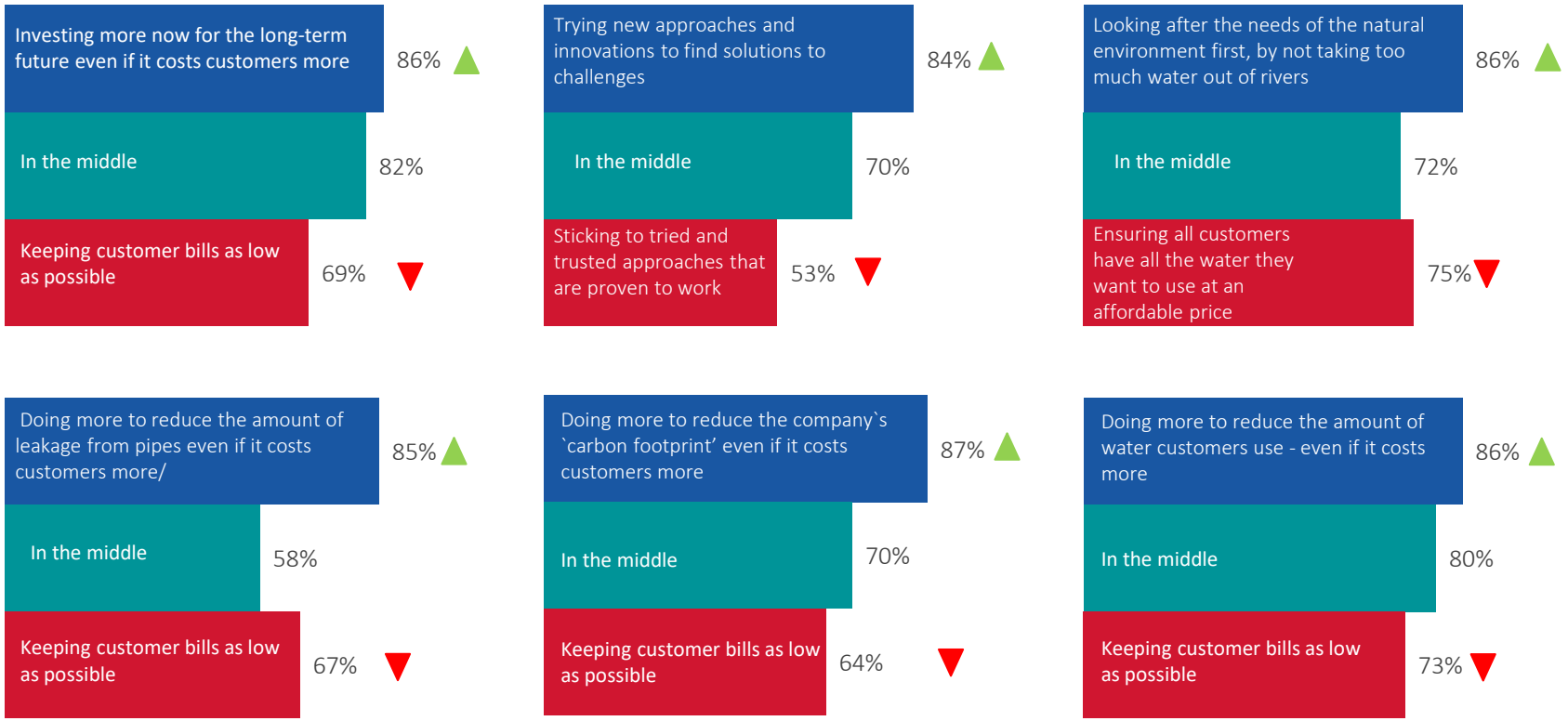
Q41. How strongly do you support or oppose this national target for reducing leakage? (n= 574, CAM: 133, SSW: 441)

Those who strongly support or support the national target for reducing leakage:

Wasting water doesn't make sense – more water for future	Help customers became more aware of water usage/ shortages	Seems like the right thing to do	Impossible to reduce leakages to 0%
Why waste water when it can be repaired *Although expensive to fix it can save precious resources for future generations.* *Because I think we could reduce leakage from improperly installed or aging works* *Because I don't like water being wasted* *because leaks should be fixed as soon as possible to avoid wasting more water than necessary*	*national targets mean more aware people and less expenditure on fixing and treating etc.* *we must become aware of the great water problem at the national and international level* *To raise awareness*	*It seems the right thing to do* *I support anything that is doing good*	*Reducing by 50% is a good target and it takes time to stop leakage* *There are limits to what can be done. That has to be accepted. Suppliers and users should however be encouraged to deal with leaks with reasonable speed and efficiency. If leaks are left (particularly those that are the responsibility of the supplier) that is a disincentive to users to be careful about their water use.* *I believe that it is important to reduce avoidable wastage*

Q42. Why did you select that option? Please write in as much detail as possible

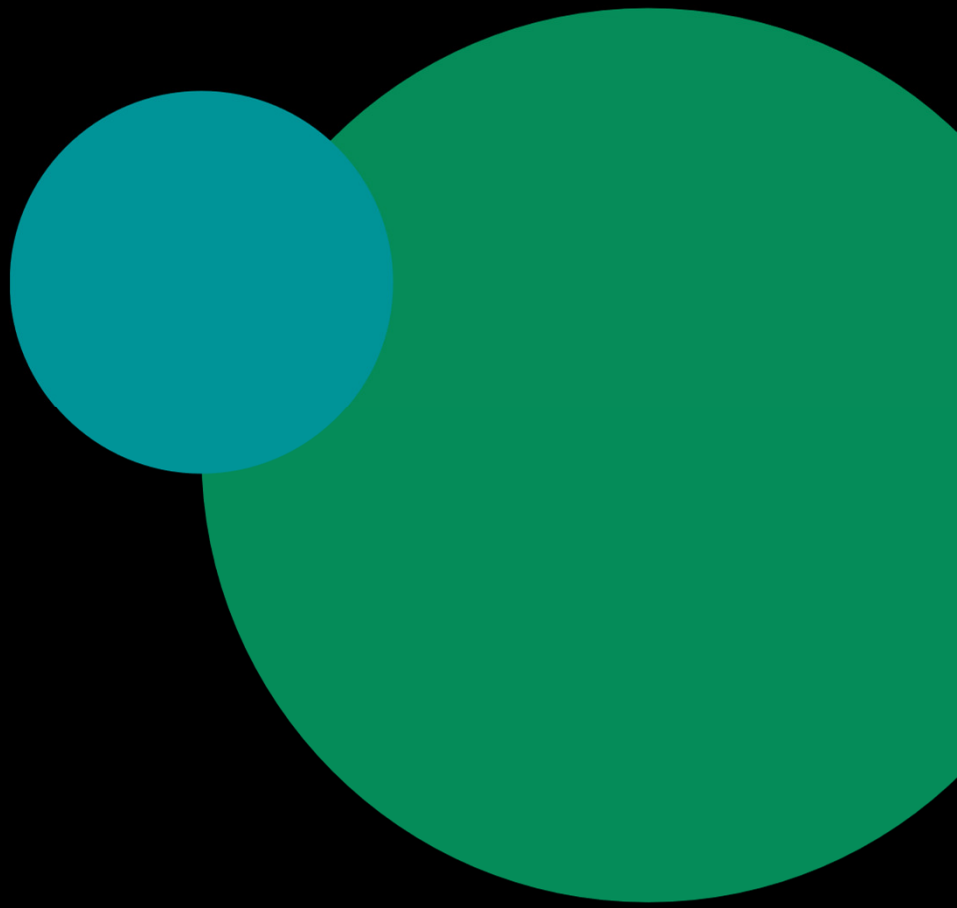
Support or oppose national target for reducing leakage – by environmental balance. The analysis shows that people being more engaged with protecting the environment, often increases the level of support for the national leakage target



In general, customers who lean toward keeping costs down (in the environmental trade off question, slides 22-25)) were significantly more likely to have lower support for the national target for reducing leakage

Q41. How strongly do you support or oppose this national target for reducing leakage? (n= 574, CAM: 133, SSW: 441)

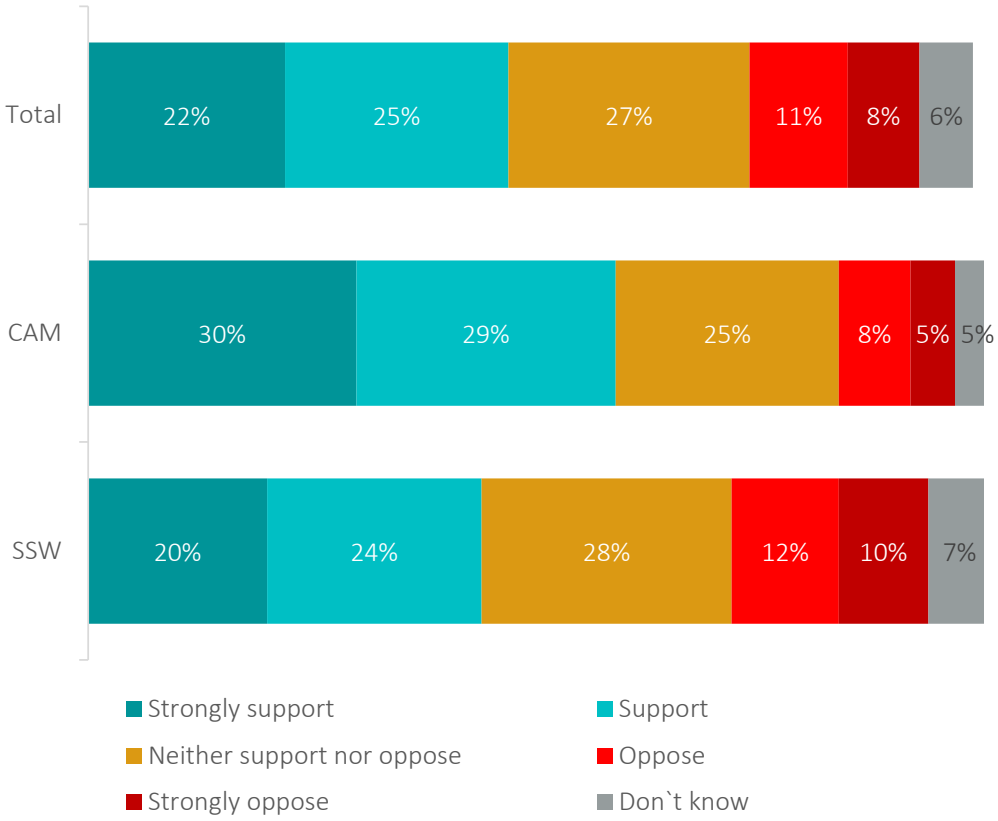
Universal metering



Accent

Uninformed: perception of universal metering

Unmetered customers were the least likely to support universal metering. Customers in CAM were significantly more likely to support this plan when compared to SSW



Support
47%
59% ▲ Significantly higher than SSW
44%

Significantly lower in:

- Severn Middle Worcestershire (30%),
- 18-34 (41%),
- Female (43%),
- Unmetered (23%),
- Caring but Time Pressed (31%) & Don't bother me (33%).
- DE (45%)

Significantly higher among :

- 65+ (58%),
- AB (55%)

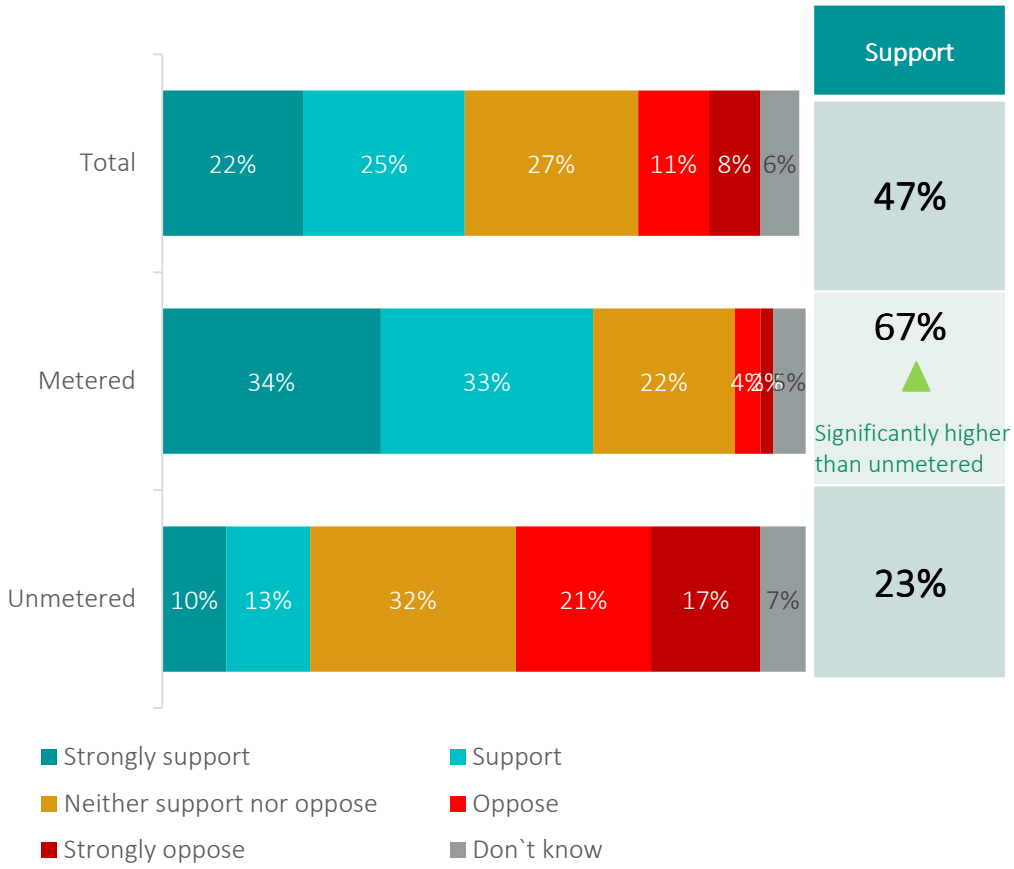
Q44. Which of the following best represents how you feel about the introduction of universal metering? (n= 1,180, CAM: 293, SSW: 887)

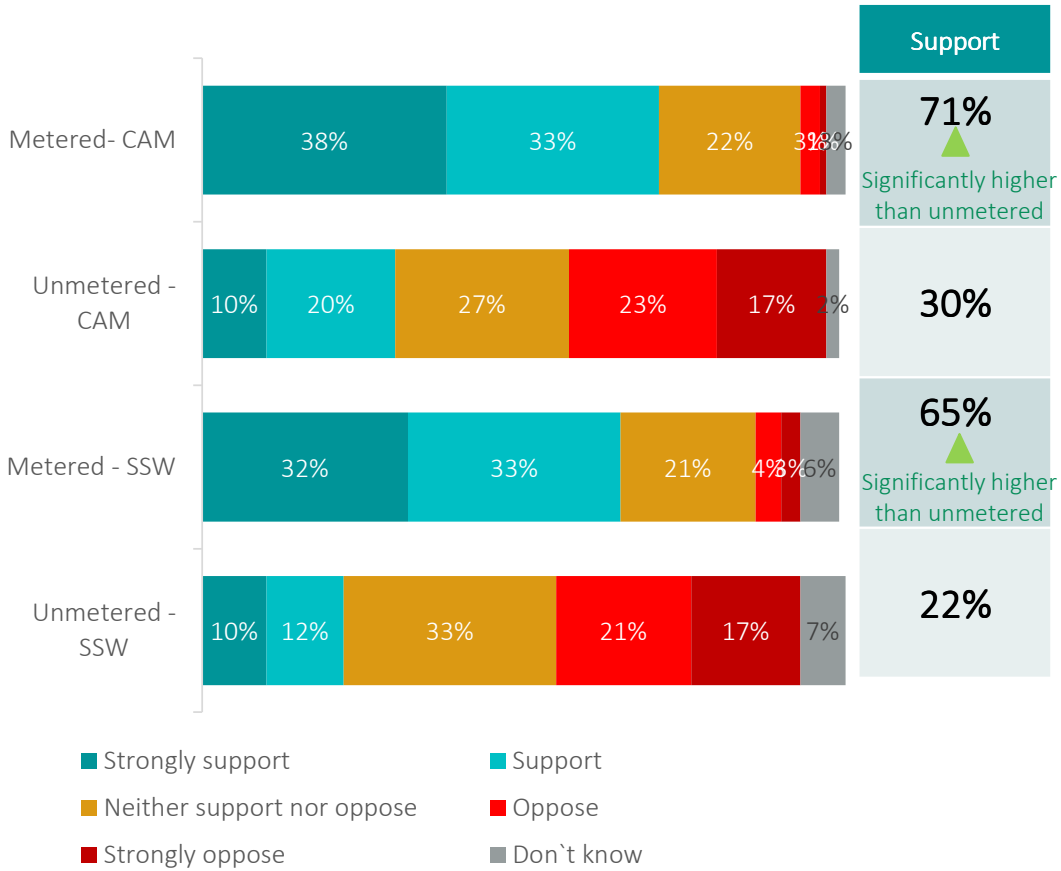
▲▼ Sig higher or lower than at least one attribute in the same category

Accent

Uninformed: perception of universal metering - by meter status in CAM/SSW

Customers who are not currently on a meter were significantly more likely to oppose universal metering, in both CAM and SSW regions.





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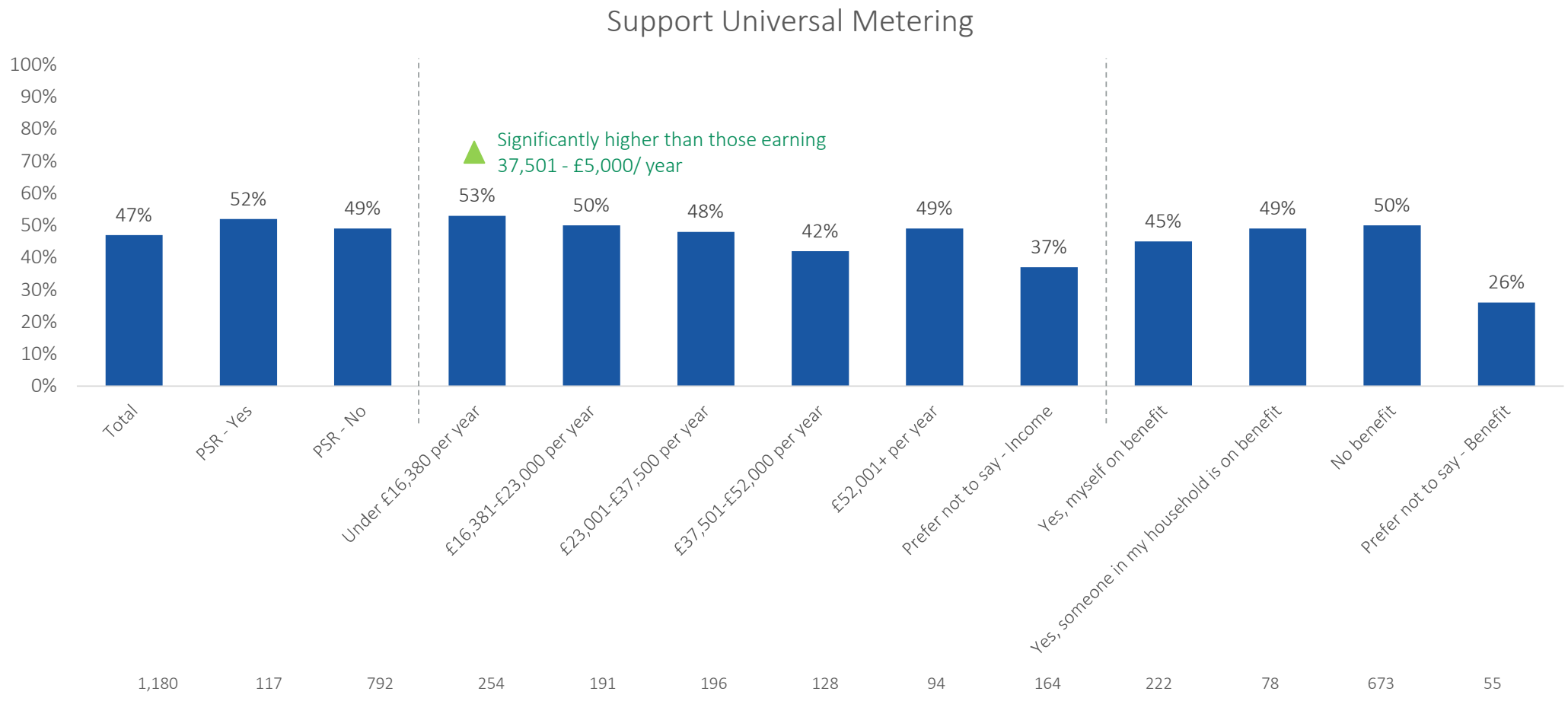
Sig higher or lower than at least one attribute in the same category

Accent

Uninformed: perception of universal metering in vulnerable groups

Apart from a small significant difference below, uninformed support for universal metering do not varied much when looking between different levels of income, or PSR status or people on benefits.



Q44. Which of the following best represents how you feel about the introduction of universal metering? (n= 1,180)

Sig higher or lower than at least one attribute in the same category

Accent

Customers were then shown information about SSW/CAM's current metering policy, the need to reduce water usage and the benefits of metering before being asked their views on which approach to metering they would like SSW/CAM to take and their willingness to pay for different options

Cambridge Water's Current Metering Polic

Cambridge Water's current target for metering over the next 25 years:
90% of household customers would be on a water meter by 2045, up from 75%

In its latest Business Plan (agreed wit
Ofwat), Cambridge Water set themse
metering over the next 25 years

Virtually all businesses already have

At the moment water meters are inst
Customers can also ask for a water m
their property. Cambridge Water doe
installing a meter when a property ch
water companies do

However, this could change. Cambrid
been classed by government as "seri
means that it can now consider unive
household customers are placed on a

Benefits of all homes and businesses being on a water meter

Everyone pays for the amount of water they use – just like all households and businesses do for their gas and electricity usage

The company is in a better place to spot if a customer's water cons
suddenly, which could indicate a leak from a pipe or appliance insi
property

Meters offer the potential for customers to have more understand
which helps them to take better decisions about how they want to

Metering is seen as one way of reducing customer demand for wa
are on water meters, the more demand could be reduced. For exa
shown that household customers use 10% less water, on average,
is fitted. The difference reduces to 5% after 5 years

Reducing Water Usage

On average, in 2020/21, **customers used 152 litres of water per person per day in the Cambridge Water region**

This is slightly higher than before the pandemic due to more people working from home

To help ensure reliable supplies of water in the future, there is now a national target for all water companies to reduce the amount used to 110 litres per person per

If you do all of the above, then washin car, watering the garden or taking a l shower would take you over the 110 target

Benefits of all homes and businesses being on a water meter

Everyone pays for the amount of water they use – just like all households and businesses do for their gas and electricity usage

The company is in a better place to spot if a customer's water consumption changes suddenly, which could indicate a leak from a pipe or appliance inside or outside their property

Meters offer the potential for customers to have more understanding of their water usage which helps them to take better decisions about how they want to use water

Metering is seen as one way of reducing customer demand for water. The more people who are on water meters, the more demand could be reduced. For example, national research has shown that household customers use 10% less water, on average, in the years after the meter is fitted. The difference reduces to 5% after 5 years

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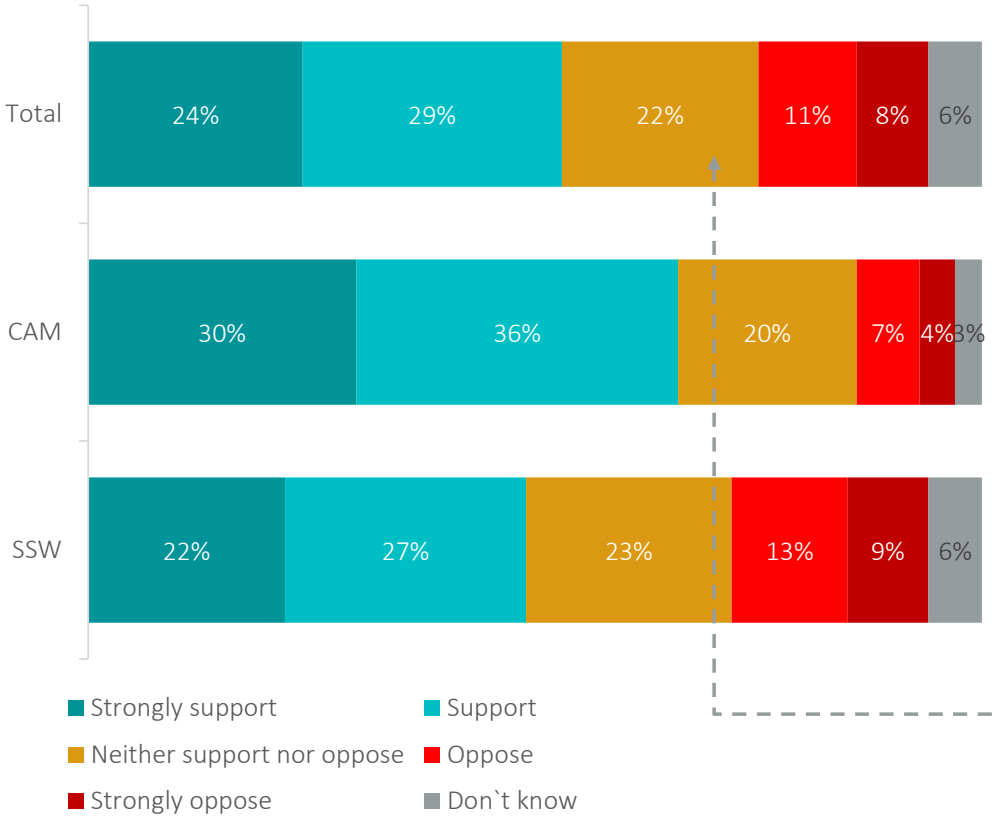
Informed: perception of universal metering:

Informed support increased in most all groups apart from Don't bother me. Informed support continued to be significantly higher among CAM than in SSW



Support
53%
66% ▲ Significantly higher than SSW
49%

Significantly lower among:

- Severn Middle Worcestershire (36%),
- 18-34 (48%),
- Unmetered (31%),
- Caring but Time Pressed (37%) & Don't bother me (33%).

Significantly higher among:

- Cam & Ely Ouse (66%)
- 65+ (65%),
- AB (60%),
- Metred (71%)

Little significant difference in demographic can be seen among those who neither support or oppose universal metering. However, they were groups significantly more likely to give this response:

- Unmetered (29%)
- Caring but Time Pressed (31%)
- Don`t bother me (31%)

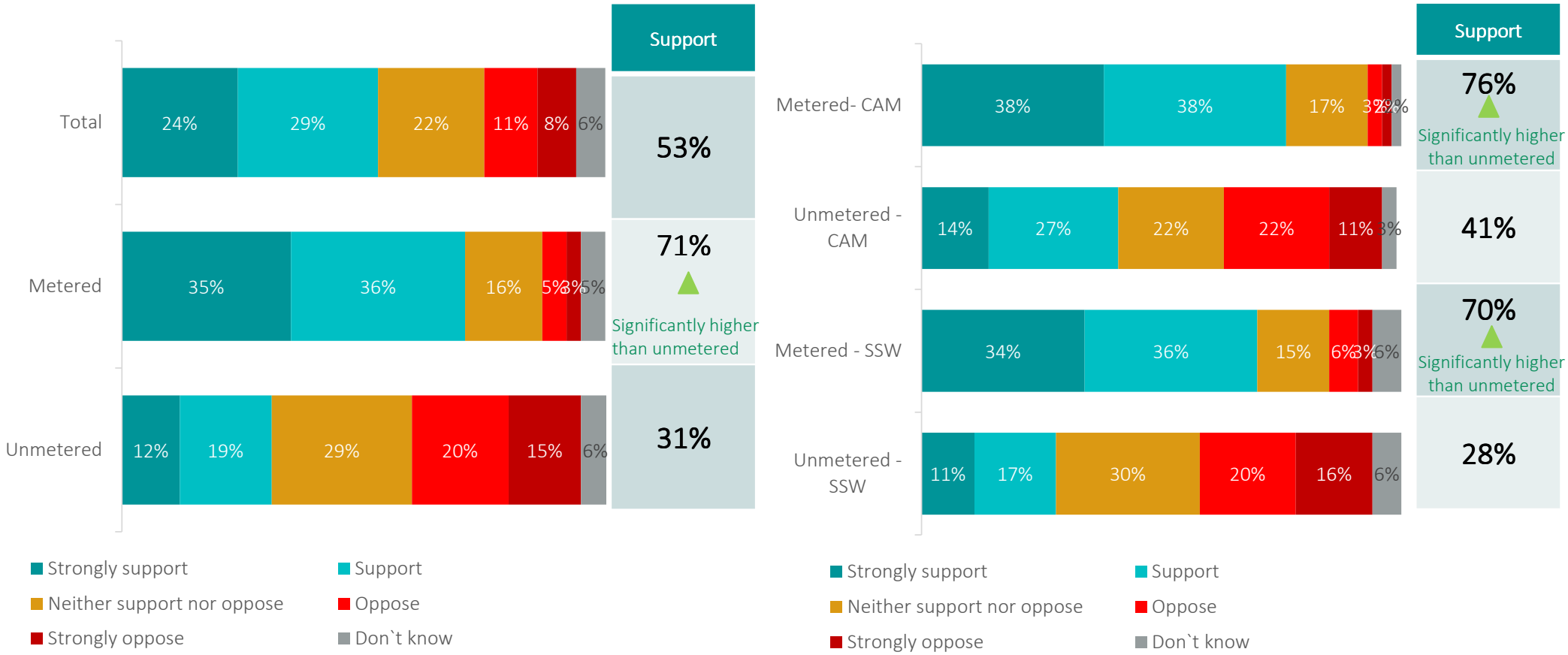
Q45. Now that you`ve learnt a bit more about universal metering, which of the following best represents how you feel about SSW/CAM introducing this policy? (n= 1,180, CAM: 293, SSW: 887)

▲▼ Sig higher or lower than at least one attribute in the same category

Accent

Informed: perception of universal metering: - by meter status in CAM/SSW

Increase in support for universal metering can be seen across the board but significantly higher among those currently have a water meter



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Sig higher or lower than at least one attribute in the same category

Accent

Uninformed vs Informed: Perception of universal metering

Overall, there was a significant increase in support of universal metering once customers were informed (most of which came from SSW). Despite the 7ppt increase in CAM, this was not significant

	Uninformed Support	Informed Support	
Total	47%	53% ▲	Significant increase
CAM	59%	66%	
SSW	44%	49% ▲	Significant increase

Informing unmetered customers of the need and benefits of meter significantly increased acceptability – **important for communicating should universal metering be introduced**

Meter status	Metered	Unmetered
Uninformed	67%	23%
Informed	71%	31% ▲
	587	479

Q45. Now that you've learnt a bit more about universal metering, which of the following best represents how you feel about SSW/CAM introducing this policy? (n= 1,180, CAM: 293, SSW: 887)

▲▼ Sig higher or lower than at least one attribute in the same category

Accent

Uninformed vs Informed: Perception of universal metering in sub-groups

Support has increase significantly in Tame Anker & Mease, HH, Engaged Loyal Carers, Female and those unmetered

Areas	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Uninformed	59%	30%	44%	48%
Informed	66%	36%	50% ▲	61%
	225	142	562	88

HH/HNN	HH	NHH
Uninformed	47%	48%
Informed	53% ▲	56%
	1028	152

Segments	Caring but Time Pressed	Engaged Loyal Carers	Don`t bother me	Savvy switchers	Connected But Hard Pressed
Uninformed	31%	64%	33%	53%	58%
Informed	37%	74% ▲	33%	60%	64%
	295	244	209	239	193

Age	18 to 34	35 to 49	50 to 64	65+
Uninformed	41%	45%	45%	58%
Informed	48%	49%	51%	65%
	270	285	254	213

Gender	Male	Female
Uninformed	51%	43%
Informed	56%	50% ▲
	492	528

SEG	AB	C1C2	DE
Uninformed	55%	45%	45%
Informed	60%	51%	51%
	206	508	279

Q45. Now that you`ve learnt a bit more about universal metering, which of the following best represents how you feel about SSW/CAM introducing this policy?

▲▼ Sig higher or lower than at least one attribute in the same category

Accent

Uninformed vs Informed: Different levels of increase in sub-groups – highest to lowest

	Uninformed	Informed	Difference in ppt
Trent Valley Staffordshire	48%	61%	13% ▲
Engaged Loyal Carers	64%	74%	10% ▲
Unmetered	23%	31%	8% ▲
Non bill payer	41%	49%	8%
NHH	48%	56%	8%
Savvy switchers	53%	60%	7%
Female	43%	50%	7% ▲
CAM	59%	66%	7%
18 to 34	41%	48%	7%
65+	58%	65%	7%
Cam & Ely Ouse	59%	66%	7%
Bill payer	47%	53%	6%
HH	47%	53%	6% ▲
Connected But Hard Pressed	58%	64%	6%
Severn Middle Worcestershire	30%	36%	6%
Tame Anker & Mease	44%	50%	6%
50 to 64	45%	51%	6%
C1C2	45%	51%	6%
DE	45%	51%	6%
Caring but Time Pressed	31%	37%	6%
AB	55%	60%	5%
Male	51%	56%	5%
SSW	44%	49%	5%
35 to 49	45%	49%	4%
Metered	67%	71%	4%
Don`t bother me	33%	33%	0%

Q45. Now that you`ve learnt a bit more about universal metering, which of the following best represents how you feel about SSW/CAM introducing this policy?

▲▼ Sig higher or lower than at least one attribute in the same category

Reasons for supporting universal metering are multi-layered but can be grouped into 5 key themes

Greater Equitability

It inherently makes sense to pay for what is used

People should pay for what they use

So that water costs are spread more evenly across the community

Water should be charged per quantity used if you use a lot you pay for it

Metering makes people more aware and responsible. It enables companies to introduce differential tariffs so that a basic amount of essential clean water is supplied at a lower cost and charges increase for higher use. Personally I need a daily bath to help my arthritis but I am prepared to pay a little extra for this and it gives customers personal choice. We must avoid cutting off supplies to vulnerable people by charging extra if needed fir higher use to invest in extra infrastructure to ensure adequate supplies.

Control & Awareness

As a customer I would have some control on my impact on water usage and the environment, and my children would have better understanding of their impact

It is important to reduce water used and I think information (e.g. being able to see how much you are using and therefore the effects of changes on this) is a way to bring change about

As our area is stressed we have to act. Helping to spot leaks is beneficial. Customers will also be more conscious of their water usage and it's cost with a meter

Incentive to Reduce

Customers will be less likely to leave water running when it's not needed

Everyone needs to try to take responsibility for helping to conserve water usage and having to pay for amount of water used makes most people think twice about usage

It's fair and encourages a reduction in water usage

Accent

Reasons for supporting universal metering are multi-layered but can be grouped into 5 key themes

Protecting the Environment

Universal metering will benefit the environment and make users more accountable for wastage

As our area is stressed we have to act. Helping to spot leaks is beneficial. Customers will also be more conscious of their water usage and it's cost with a meter

If it helps to limit the amount of water people use, it'll help the environment in the long run

Customers with water meters cannot be expected to reduce their water use to a level where their life is made difficult, impractical or safe. I do not believe people on water meters do any such thing. Therefore, a reduction of 5% in water use after the meter is installed is desirable for the environment without impacting any serious activity of the users. Only profligate, indulgent or wasteful consumers will either have to cut back or pay higher bills. These are generally the very same anti social people at the heart of many problems in our communities. They are not worth considering

Potential to Save Money

It generally makes people more aware of their usage enabling them to reduce it and save money

As it can help people save money in the long run by knowing exactly what water is used

As a single person I save money by having a water meter. I am not sure that I actually use less water though I am mindful of how I use my water.

Potential to save money and helps the environment. Win win

Accent

The potential to reduce leakage is an additional bonus customers often don't spontaneously consider when assessing the impact of metering

Reducing Leakage

I strongly believe you should pay for what you use just like gas and electricity. It also has the same benefits as electric smart metering in being able to measure demand and feedback to consumers and **spot leaks**

As our area is stressed we have to act. **Helping to spot leaks is beneficial**. Customers will also be more conscious of their water usage and it's cost with a meter.

The use of water needs to be taken seriously by everyone who is mentally able to do that. Metering makes it much easier for us all to keep an eye on our usage. **It is also the best way to help consumers detect leaks.** A year or so ago I queried bills and was told not to worry if my consumption went up a bit. I decided to check water usage every day and soon found that water was being used when things were turned off. I would not have known that if I had not had a meter.

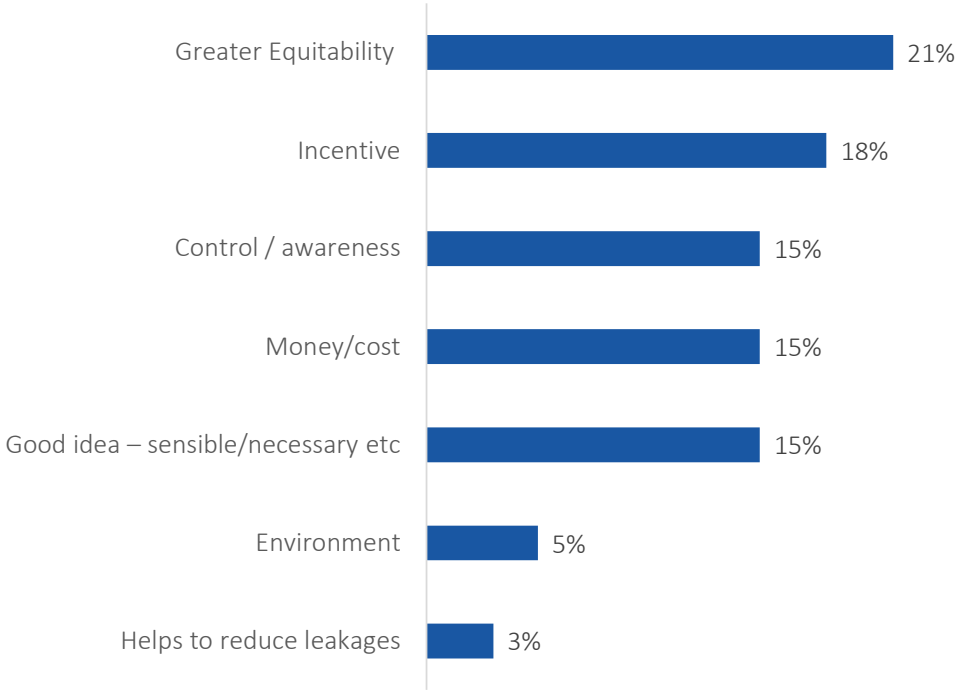
Everyone needs to take responsibility for water usage. **The fact it helps detecting leaks is an added bonus**

Having a meter makes people more aware of how much water they are using. **It's also helps to spot potential leaks.**

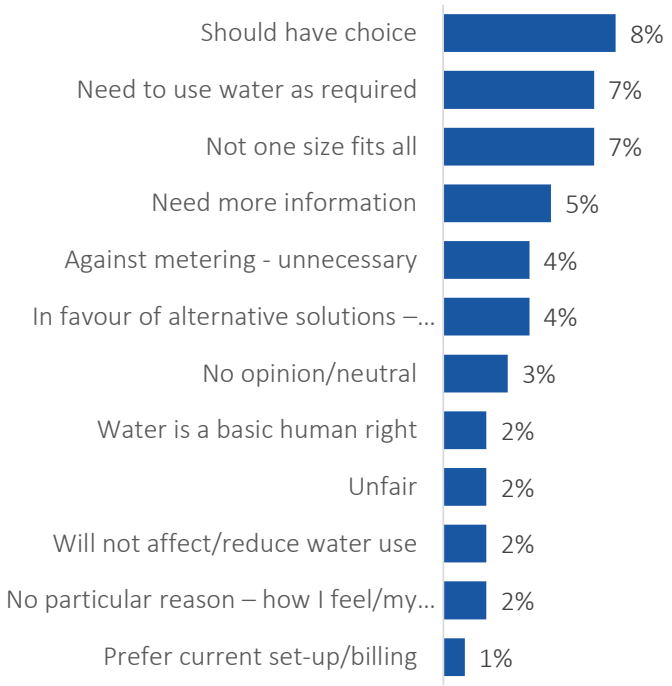
It seems that people reduce their water usage naturally once they see how much they use. **Also, it was mentioned before that costs would triple instead of double when trying to find more leaks, since the ones that are left are smaller and harder to find. Water meters could help partially solve that problem,** reducing costs for everyone, and more importantly saving water.

Reasons to support and oppose Universal metering – Quantified themes

Key reasons for support Universal Metering



Key reasons for NOT support / Neutral about Universal Metering



% based on all participants. Multi-coded. Not include dont know, non stated…

Reasons for NOT supporting universal metering cover 5 key areas:

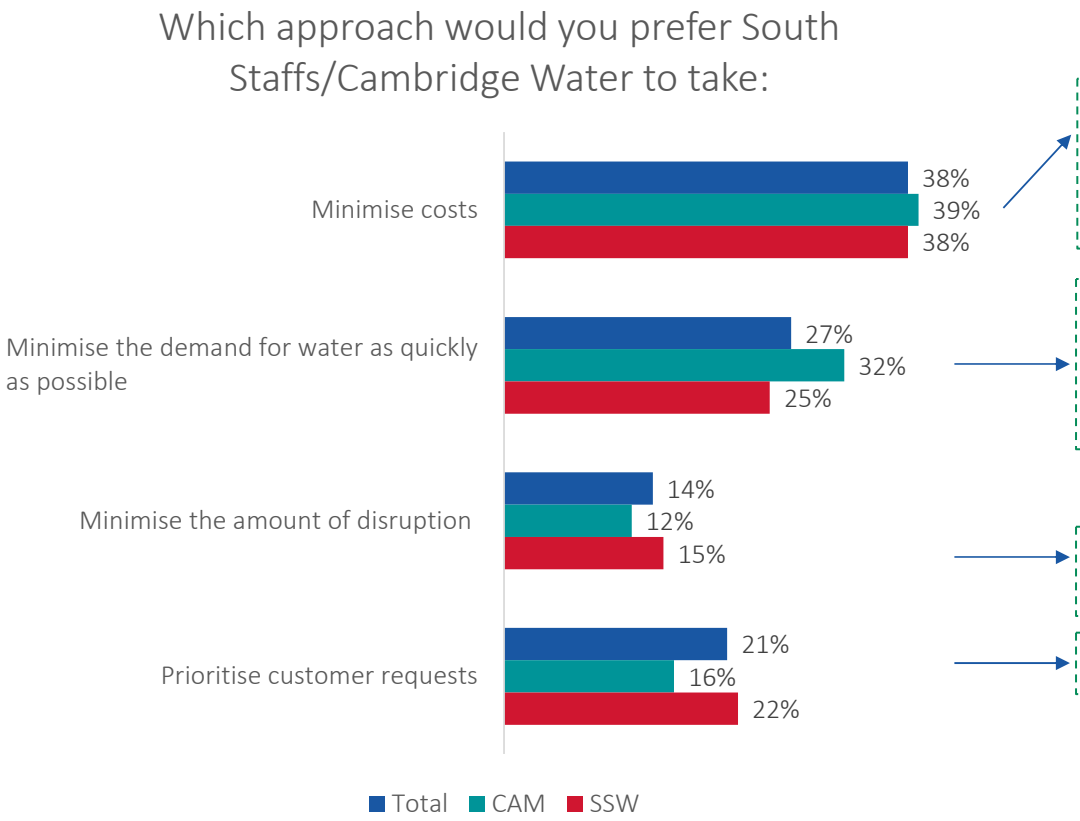
Not acceptable to transfer cost to customers	Having enough water is basic human right	It's a personal choice	Increases cost for poorer family	Other solutions instead
The cost of doing so always gets passed on to customer. Better to invest in fixing infrastructure and future-proofing it *Another stick to beat the consumer with. May reduce consumption, then you raise prices to make up the revenue shortfall*	*Having enough water to bathe and wash properly is a basic human right.* *How can you ask a family to wash clothes 2 per week. 5 short showers per week.. this is just not really in a living world* *Very restrictive and dictatorial to be told, for example, you can only flush the loo 5 x per day*	*On personal principle - I do not care to be dictated to. If I choose to have a meter so be it. But do not tell me to have one fitted.* *Freedom of choice* *Do not want to be forced to have a meter*	*Haven't seen the numbers, plus unfairness - well off people won't notice an increase in water prices and will carry on using what they like, but poorer people will feel forced to do without water that they actually need.* *Water metering is an imposition on the customer's quality of life. It means the poor are forced to use less and the wealthy know no limits.*	*I think education is a much better way than using force.* *Because I feel this is a step too far. Better investment should be made first.*

Reasons for being neutral about universal metering cover 3 areas:

Understand why, but not happy	Not enough information / unsure	Not one size fit all
I don't like the idea of being monitored but if it's a necessary evil I would have to accept it. *I understand the need for metering but not sure of it should be compulsory* *I can see some benefits but do not like the idea of it being forced upon me* *I suppose because I am careful anyway and I am aware not to waste water. However not everyone bis like me .. Anything compulsory is not very pleasant to be forced into anything. But I can see it would cut down waste*	*I don't know enough to have a proper opinion* *am not sure about universal metering* *I don't have an opinion on the subject.* *Have heard different reviews on meters not sure if we would benefit*	*I see the benefits of metering but it's not a one size fits all.* *Metering allows single people and couples to save on water bills, however for families with young children it may restrict their ability to maintain hygiene and prevent disease.*

Universal metering approach:

Customers were divided on installing meter approaches. Around 2 in 5 supported minimise cost with a blanket installation. Overall, no significant differences between CAM and SSW



Option that was least likely to be selected as first preference in the CR qual. Likely that cost of living crisis is impacting of customer views in this quantitative work (as well as methodological impact)

Sig lower among: Severn Middle Worcestershire (6%); Don't bother me (16%)
Sig higher among : Caring but Time Pressed (32%); Engaged Loyal Carers (32%)

Sig higher among: Severn Middle Worcestershire (26%), Don't bother me (20%)

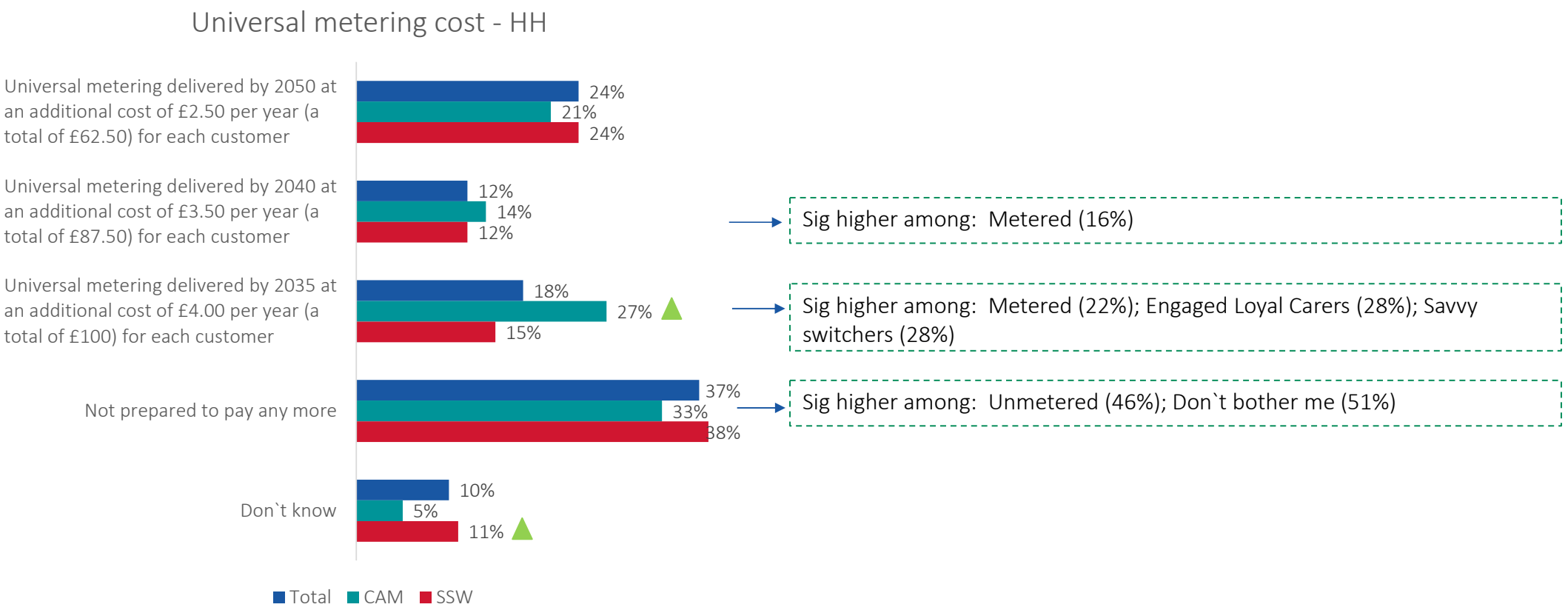
Sig higher among: Unmetered (25%)

Q47. If universal metering does go ahead, which approach would you prefer South Staffs/Cambridge Water to take: (n= 606, CAM: 159, SSW: 447)

Sig higher or lower than at least one attribute in the same category

Universal metering cost- HH only:

Not preparing to pay more was the most popular option with 37% of customers opting for this choice. CAM customers were significantly more likely to pay £4/year when compared to SSW



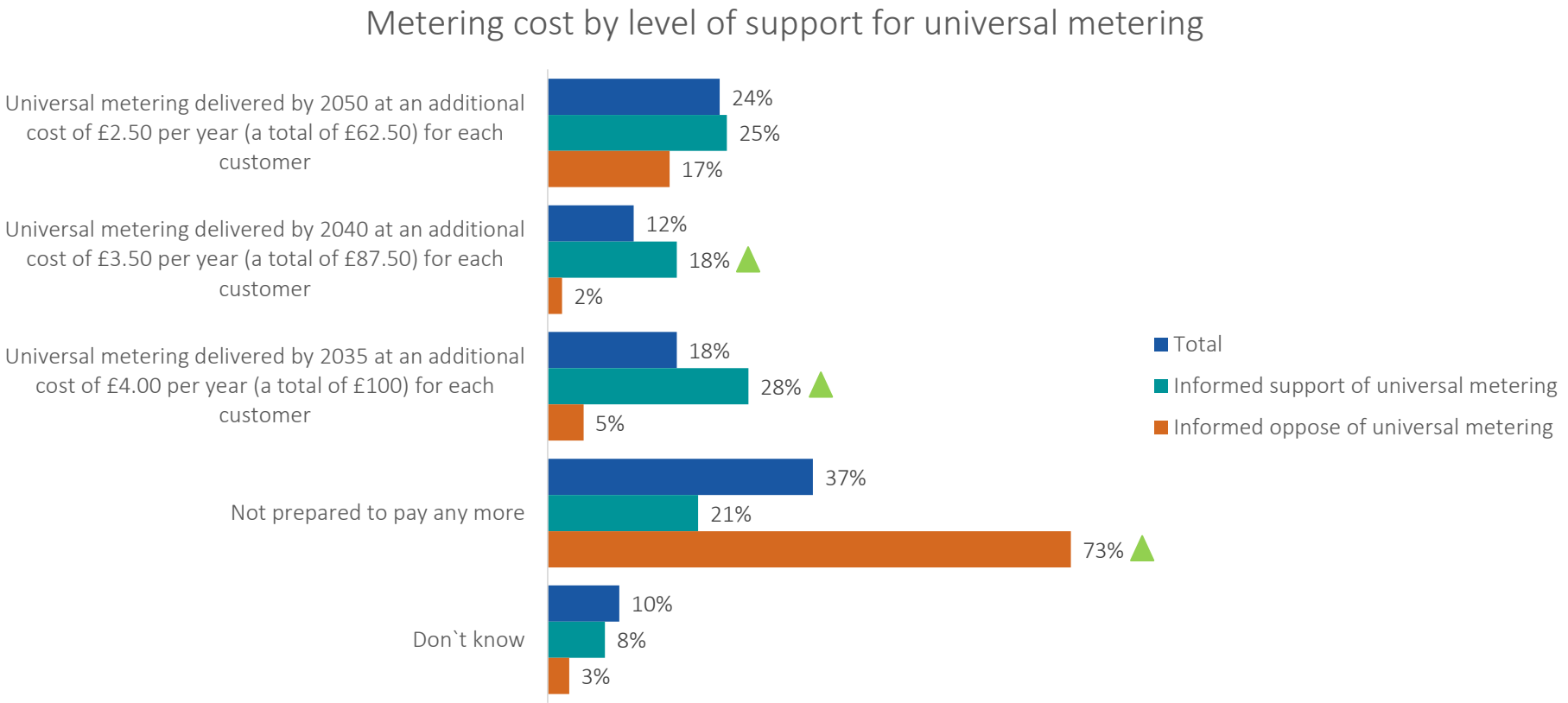
Q48. Whether you are for or against universal metering, which of these options would you support? (n= 540, CAM: 135, SSW: 405)

Sig higher or lower than at least one attribute in the same category

Accent

Universal metering cost- HH only: by support for universal metering

Customers who supported universal metering were significantly more likely to pay for an additional amount, while those who opposed this approached are more likely to opt for not paying any more



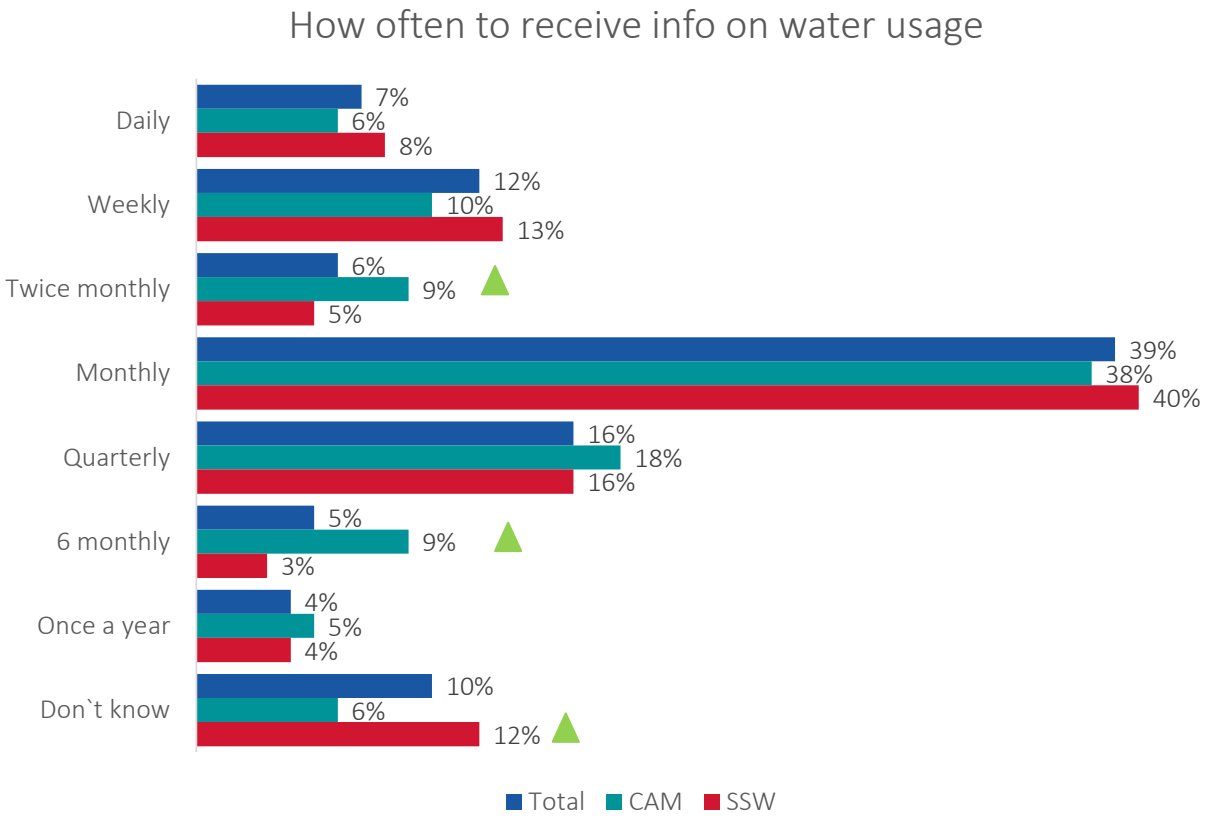
Q48. Whether you are for or against universal metering, which of these options would you support? (n= 540, CAM: 135, SSW: 405)

Sig higher or lower than at least one attribute in the same category

Accent

Frequency of receiving info on water usage from a meter:

Receiving info once a month was thought to be the best option with nearly 40% of customers selecting this.



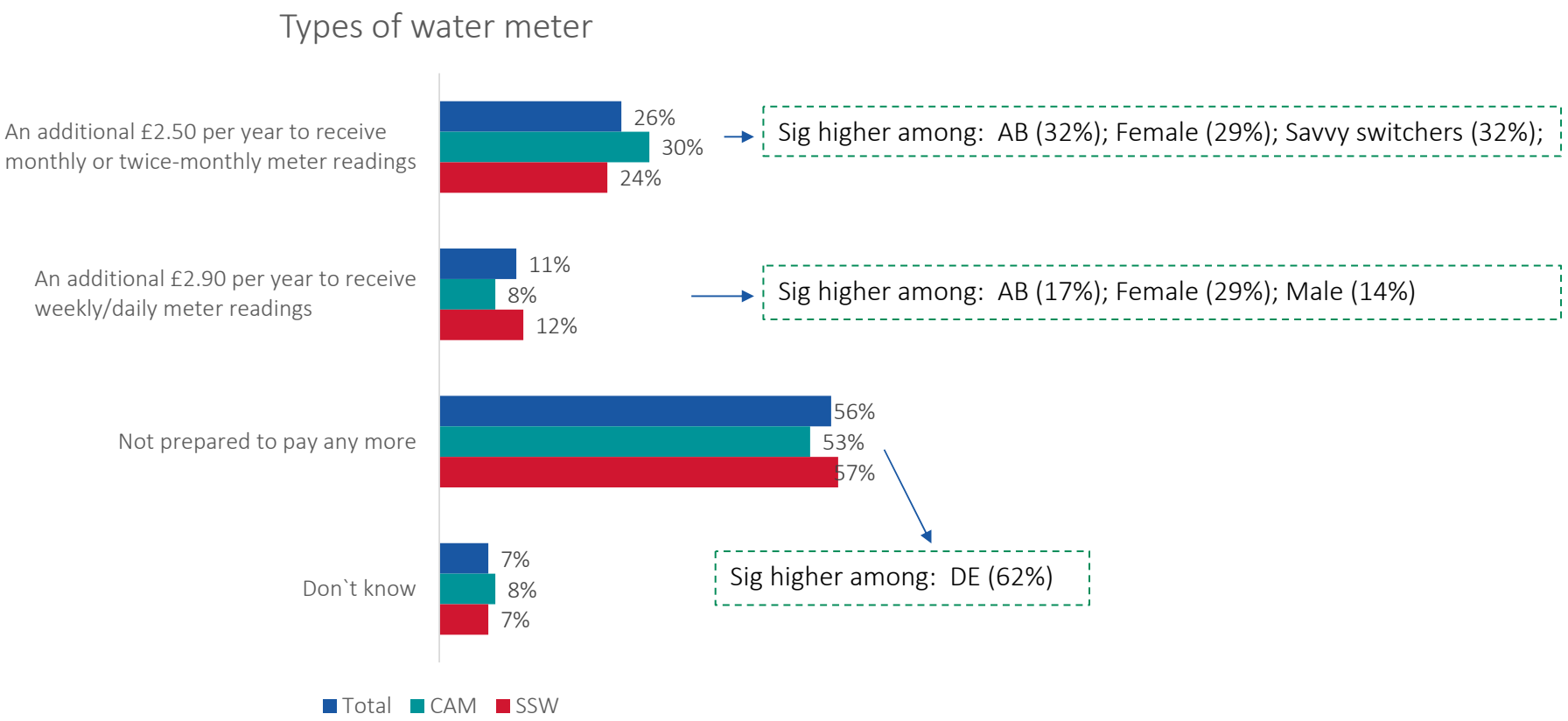
Q49. Whether or not you currently have a water meter, how frequently would you like to receive more information on your water use from your water meter?
(n= 606, CAM: 159, SSW: 447)

Sig higher or lower than at least one attribute in the same category

Accent

Types of water meter reading:

The majority of customers did not want to pay extra for more frequent meter reading. Customers from lower social group were significantly more likely to choose this option



Q49a. Which of these would you be prepared to pay for? (n= 606, CAM: 159, SSW: 447)

Sig higher or lower than at least one attribute in the same category

Accent

Environmental Ambition

Accent

Customers were shown information before continuing the survey

SSW

The Water Environment

Currently only 16% of waters in England are classed as being in good ecological condition. This is assess
Agency and is based on four factors:

- Biological quality: the health and abundance of fish, invertebrates, plants, etc
- Structural quality: are banks capable of supporting wildlife, is the river-bed in good condition to sup
other wildlife?
- What is the water like: the right temperature, the right balance of chemicals and nutrients to allow
wildlife to thrive, etc
- Pollution levels: level of chemicals (like nitrates) or fertilizer run-off

Across the area that South Staffs supplies, there are 129
Special Scientific Interest (SSSIs).

There are also 2 wetlands of international impor
(called RAMSAR sites) which are very sensitive t

Taking Water From Rivers, Streams and Underground

The amount of water that is taken from rivers, streams and undergr
sources has a direct impact on the condition of the water environm

- **Too much water taken out** can make environmental conditions **w**
- **Reducing the amount of water taken** out can **improve** the condit
these environments

The Environment Agency

Companies can't just decide for themselves how much water they
where. **The Environment Agency closely monitor how much water**
companies at each location where it is taken from.

The Environment Agency sets specific limits for each company and
to make sure that the environment is protected to at least a minim
that so few water environments are currently in good condition, m
in order to get these environments back into a better state

Each water company must set out its environmental ambitions wi
Resources Management Plan and this is an area where customers
voice over what the ambition should be

Waste water

South Staffs Water

NOT responsible for treating wastewater in your area

You may have heard in the news that some water companies have been fined for polluting rivers. Recently one company that handles wastewater was fined a record amount for illegally dumping sewage into waterways

It is important to **remember that South Staffs Water is NOT responsible for treating wastewater in your area**. That is the responsibility of Severn Trent Water, so they will be the ones who have to consider how to prevent these types of pollution incidents

However, even though South Staffs Water doesn't deal with wastewater they do have responsibilities for (and important choices to make) about the environment within their Water Resources Management Plan and how they treat the water to ensure it meets drinking water quality standards

CAM

The Water Environment

Currently only 16% of waters in England are classed as being in good ecological condition. This is asses
Agency and is based on four factors:

- Biological quality: the health and abundance of fish, invertebrates, plants, etc
- Structural quality: are banks capable of supporting wildlife, is the river-bed in good condition to s
other wildlife?
- What is the water like: the right temperature, the right balance of chemicals and nutrients to allo
wildlife to thrive, etc
- Pollution levels: level of chemicals (like nitrates) or fertilizer run-off

29 Sites of Special Scientific Interest (SSSIs)

Of these 29 sites, 10 of them are "wetland" sites which are ve
being damaged.

- The Cambridge region also has a special water environmen
streams. These are globally rare habitats. Only 12 of 224 ch
country have special protection, and over half are unlikely t
conservation targets without action being taken to protect
- Chalk streams are important habitats for wildlife supportin
plants and animals. However, chalk streams are suffering fr
abstraction (i.e. too much water taken from them, particul
water supply). This threatens the wildlife and plants that re
healthy streams. **Currently, most chalk streams not design
protection**

Taking Water From Rivers, Streams and Underground

The amount of water that is taken from rivers, streams and ur
sources has a direct impact on the condition of the water env

- **Too much water taken out** can make environmental conditi
- **Reducing the amount of water taken** out can **improve** the
these environments

The Environment Agency

Companies can't just decide for themselves how much water
where. **The Environment Agency closely monitor how much**
companies at each location where it is taken from

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that so few water environments are currently in good conditi
in order to get these environments back into a better state

Each water company must set out its environmental ambitic
Resources Management Plan and this is an area where custo
voice over what the ambition should be

Waste Water

Cambridge Water

NOT responsible for treating wastewater in your area.

You may have heard in the news that some water companies have been fined for polluting rivers. Recently one company that handles wastewater was fined a record amount for illegally dumping sewage into waterways

It is important to **remember that Cambridge Water is NOT responsible for treating wastewater in your area**. That is the responsibility of Anglian Water, so they will be the ones who have to consider how to prevent these types of pollution incidents

However, even though Cambridge Water doesn't deal with wastewater they do have responsibilities for (and important choices to make) about the environment within their Water Resources Management Plan and how they treat the water to ensure it meets drinking water quality standards

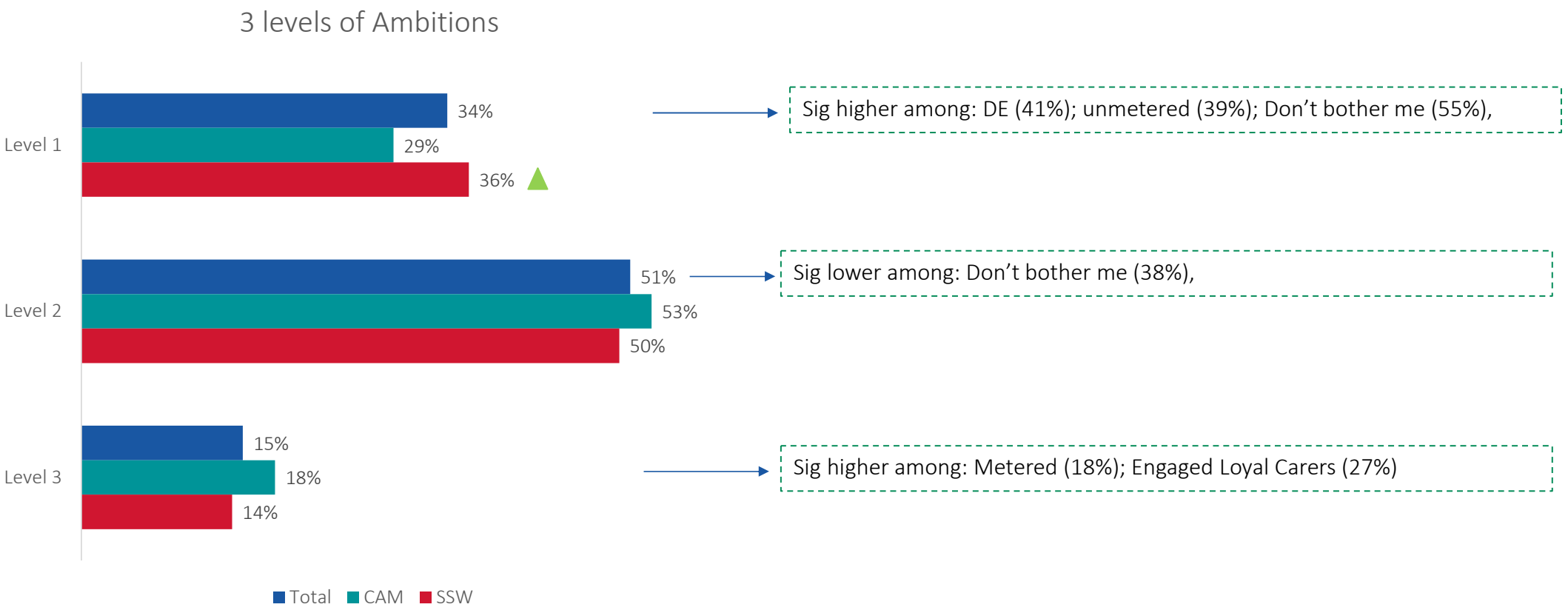
nt

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

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

Levels of ambition:

Around half of customers opted for level 2, and about a third chose level 1. Significant more customers in SSW chose level 1 when compared to CAM. No sig differences between HH and NHH



Q52. There are broadly three levels of environmental ambition that could go into SSW/ CAM plans. Which option would you prefer SSW/CAM to implement: (n= 1,180, CAM: 293, SSW: 887)

Sig higher or lower than at least one attribute in the same category

Levels of ambition:
Reasons for choosing level 1, 2 or 3

Customers who support Level 1 overwhelmingly cited cost as their reason:

- *Energy prices are rising don't want huge water bills*
- *As much as I feel strongly about protecting the environment and our future, with rising costs of living and energy at this current time the cost of our utility bills remains a key concern.*
- *Because there should be more investment of profits and not penalise customers with higher charges*
- *As much as I would like to protect the environment, all bills are going up and choices have to be made*

Customers who support Level 2 thought it was a balance option between protecting the environment & cost:

- *A balance between medium term need and payment for current customers*
- *There will be some environmental improvements with not too severe costs being piled on customers*
- *Reasonable balance and would agree to a small increase in charges to protect the wider environment.*
- *I would like to think that we are taking the right steps to conserve without adding too much cost and the balance will be right*
- *If every company does a bit more than requested, we can all achieve a good result and share its cost*

Customers who support Level 3 thought we need to do more to protect the environment:

- *Need to do more ; you're already pumping sewage into the sea and putting poison in Cambridge's water supply*
- *In the long run, if the environment is to be restored and then maintained in this pristine condition consumers will have to pay for it.*
- *They have made loads of money from people in past they should supply a good and caring service*
- *We need to act now, and I see this as an investment which should reduce our bills in the future*
- *Money should not be the deciding factor of our planets welfare*

Levels of ambition:

Customers who opted for level 3 were significantly more likely to be environmentally conscious

		Total	Support Level 1	Support Level 2	Support Level 3
Protecting lakes, rivers, reservoirs, fish and other aquatic plants and wildlife is really important to me	Top 3 box	60%	49% ▼	63%	81% ▲
	Mean	7.85	7.28	7.95	8.75
I am concerned about the impact of climate change on the natural environment in my area	Top 3 box	53%	38% ▼	57%	71% ▲
	Mean	7.27	6.45	7.5	8.3
I do more to save energy than I do to save water in my home	Top 3 box	27%	28%	27%	25%
	Mean	5.85	5.89	5.88	5.65
I worry about the amount of water available for use in my local area	Top 3 box	21%	14% ▼	22%	31% ▲
	Mean	5.08	4.71	5.2	5.49
I don`t think much about saving water, I just take it for granted really	Top 3 box	16%	20% ▲	15% ▼	16%
	Mean	4.24	4.66	4.21	3.46

Q30. How much do you agree or disagree with the following statements (n=1,180

▲▼ Sig higher or lower than at least one attribute in the same category

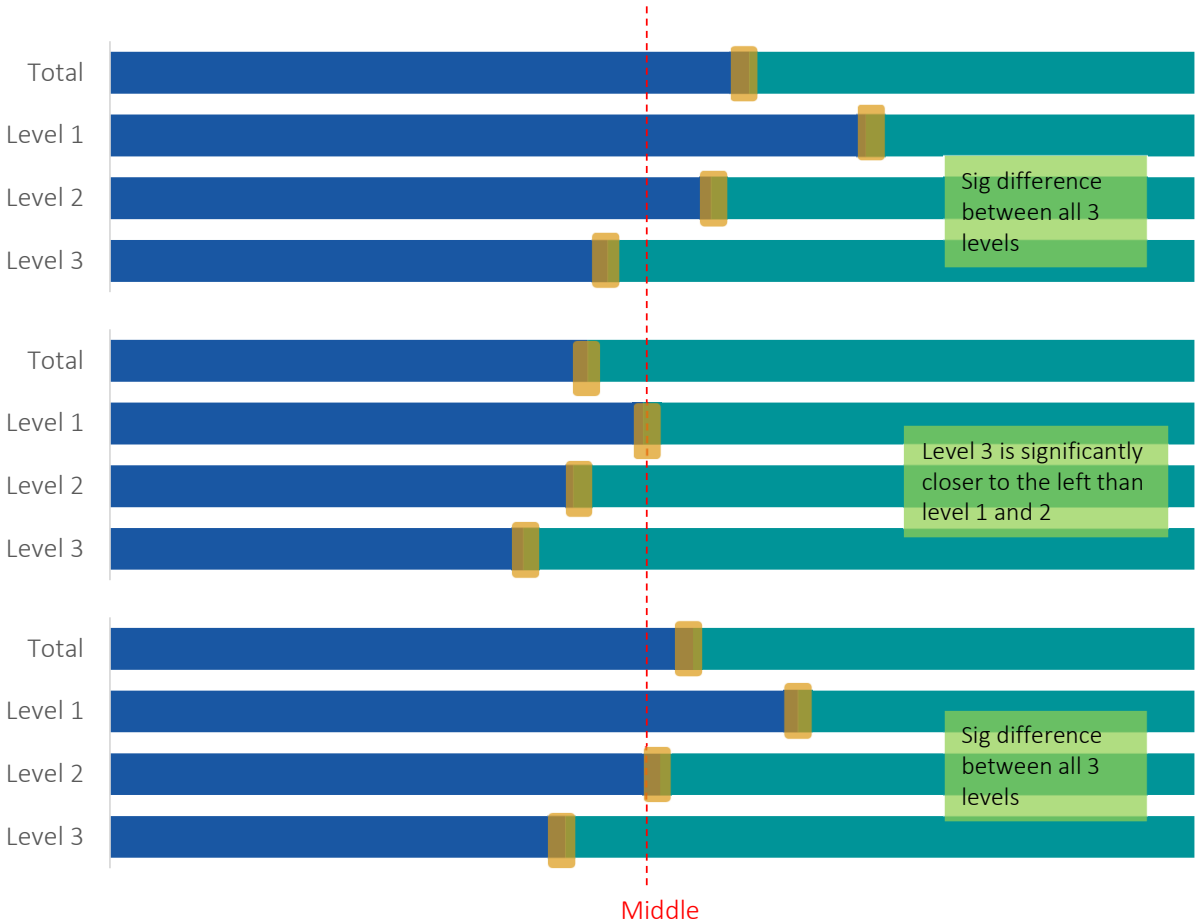
Accent

Levels of ambition vs Planning balances 1:

Customers who opted for level 3 are significantly more likely to lean toward doing more for the environment while those chose level 1 were more likely to go toward lower cost

Investing more now for the long-term future even if it costs customers more

Keeping customer bills as low as possible



Trying new approaches and innovations to find solutions to challenges

Sticking to tried and trusted approaches that are proven to work

Looking after the needs of the natural environment first, by not taking too much water out of rivers

Ensuring all customers have all the water they want to use at an affordable price

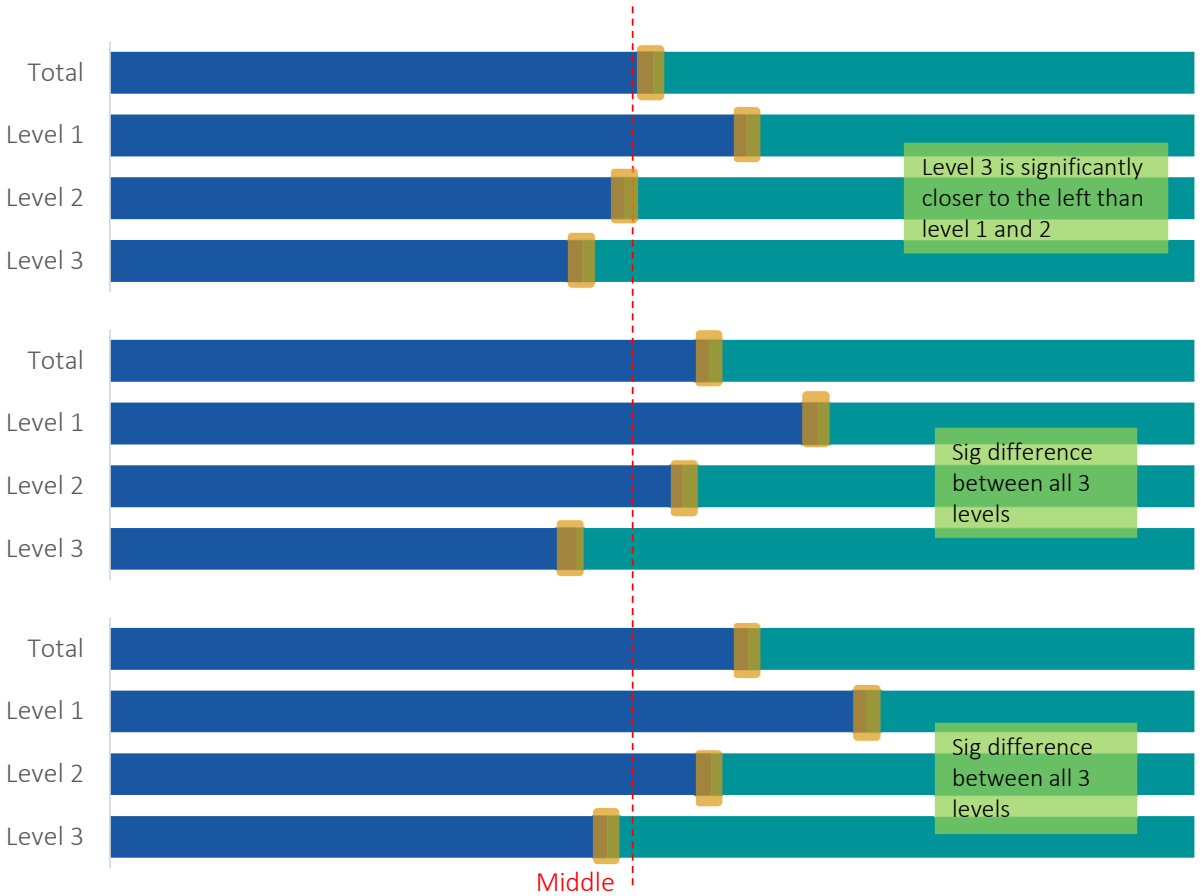
Q30. We'd like to understand your initial reaction to some key balances in terms of the company's general approach to planning and where you stand on each. Please indicate the point on the scale that that most closely reflects how you feel: , (n=1,180)

Accent

Levels of ambition vs Planning balances 2:

Those selected Level 3 agreed with paying more if it means doing more to reduce leakages, reduce carbon footprints, and reduce the amount of water customers use.

Doing more to reduce the amount of leakage from pipes even if it costs customers more



Keeping customer bills as low as possible

Doing more to reduce the company's "carbon footprint" even if it costs customers more

Keeping customer bills as low as possible

Doing more to reduce the amount of water customers use - even if it costs more

Keeping customer bills as low as possible

Q30. We'd like to understand your initial reaction to some key balances in terms of the company's general approach to planning and where you stand on each. Please indicate the point on the scale that that most closely reflects how you feel: , (n=1,180)

Accent

Levels of ambition in sub-groups

Support for 3 levels were similar across regions. Those on a meter were significantly more likely to choose a level 3 while those unmetered would opt for level 1.

Areas	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Level 1	29%	40%	37%	31%
Level 2	53%	50%	50%	50%
Level 3	18%	10%	13%	18%
Base	225	142	562	88

HH/HNN	HH	NHH
Level 1	35%	29%
Level 2	50%	54%
Level 3	15%	16%
Base	1,028.00	152

Segments	Caring but Time Pressed	Engaged Loyal Carers	Don`t bother me	Savvy switchers	Connected But Hard Pressed
Level 1	32%	25%	55% ▲	29%	32%
Level 2	55% ▲	48%	38%	56% ▲	54% ▲
Level 3	13%	27% ▲	6%	15%	14%
Base	295	244	209	239	193

Age	18 to 34	35 to 49	50 to 64	65+
Level 1	38%	38%	31%	31%
Level 2	49%	49%	51%	51%
Level 3	13%	13%	19%	18%
Base	270	285	254	213

Gender	Male	Female
Level 1	36%	34%
Level 2	48%	52%
Level 3	16%	15%
Base	492	528

SEG	AB	C1C2	DE
Level 1	29%	33%	41% ▲
Level 2	54%	53%	44%
Level 3	18%	14%	15%
Base	206	508	279

Gender	Metered	Unmetered
Level 1	32%	39% ▲
Level 2	51%	49%
Level 3	18% ▲	13%
Base	587	479

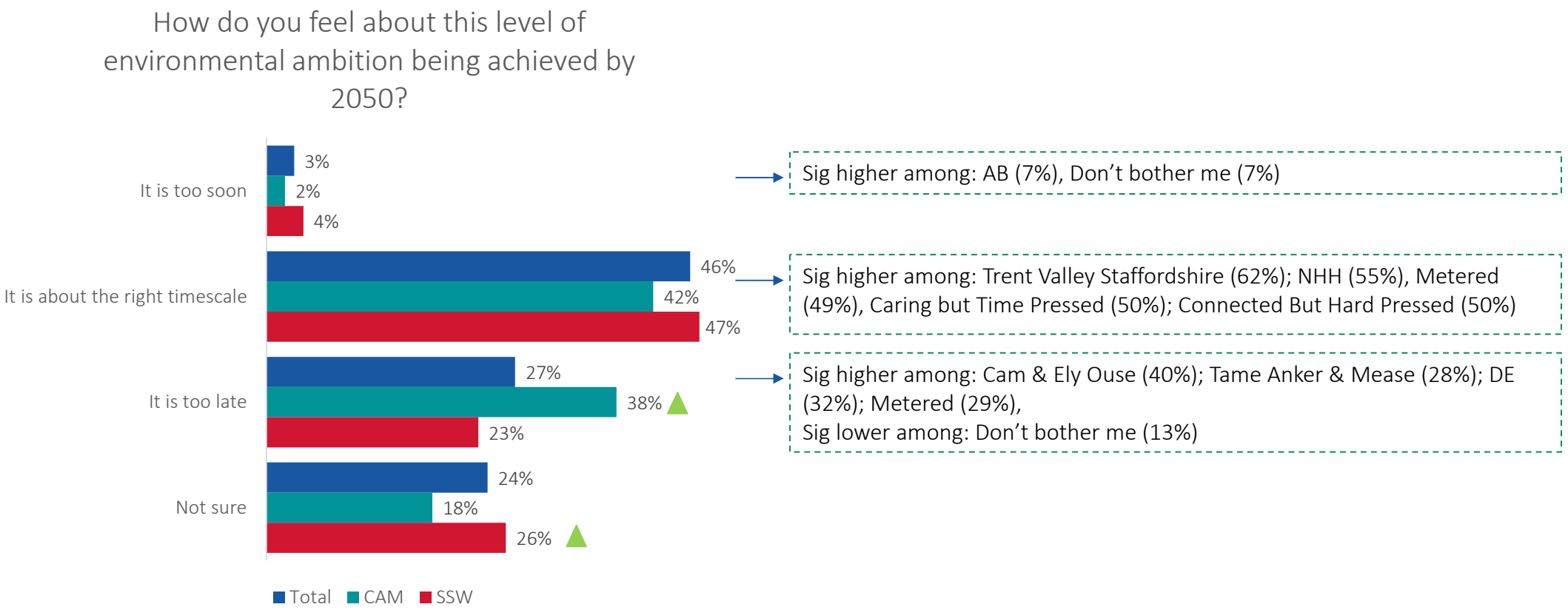
Q52. There are broadly three levels of environmental ambition that could go into SSW/ CAM plans. Which option would you prefer SSW/CAM to implement: (n= 1,180, CAM: 293, SSW: 887)

▲▼ Sig higher or lower than at least one attribute in the same category

Accent

Perception on ambition timeline (achieved by 2050):

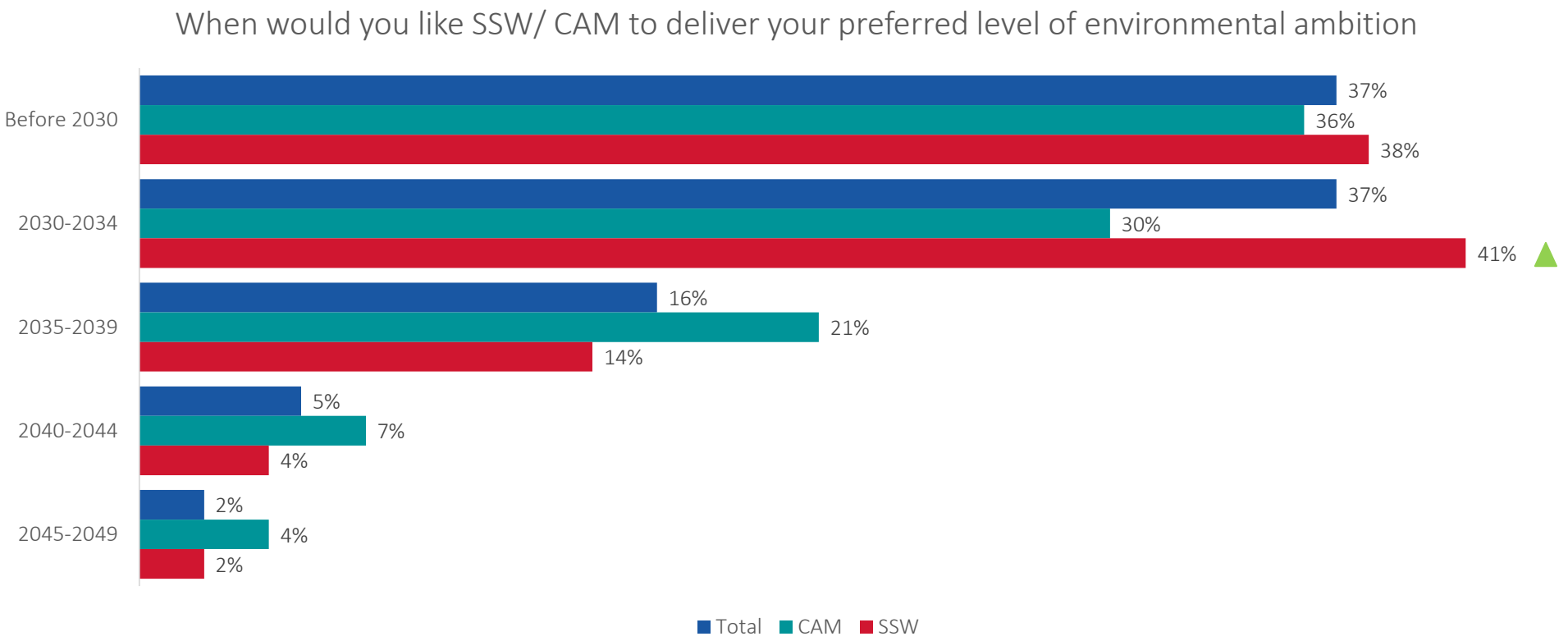
The majority of customers thought 2050 is the right timescale, while around a third thought it would be too late.



Q52. There are broadly three levels of environmental ambition that could go into SSW/CAM plans. Which option would you prefer [QAREA] to implement: (n= 1,180, CAM: 293, SSW: 887)

Those who thought 2050 is too late:

Equal proportion of customers who thought 2050 would be too late voted for a deadline before 2030, and between 2030-2034 (37%). CAM scored significantly higher for 2030-2034 when compared to SSW

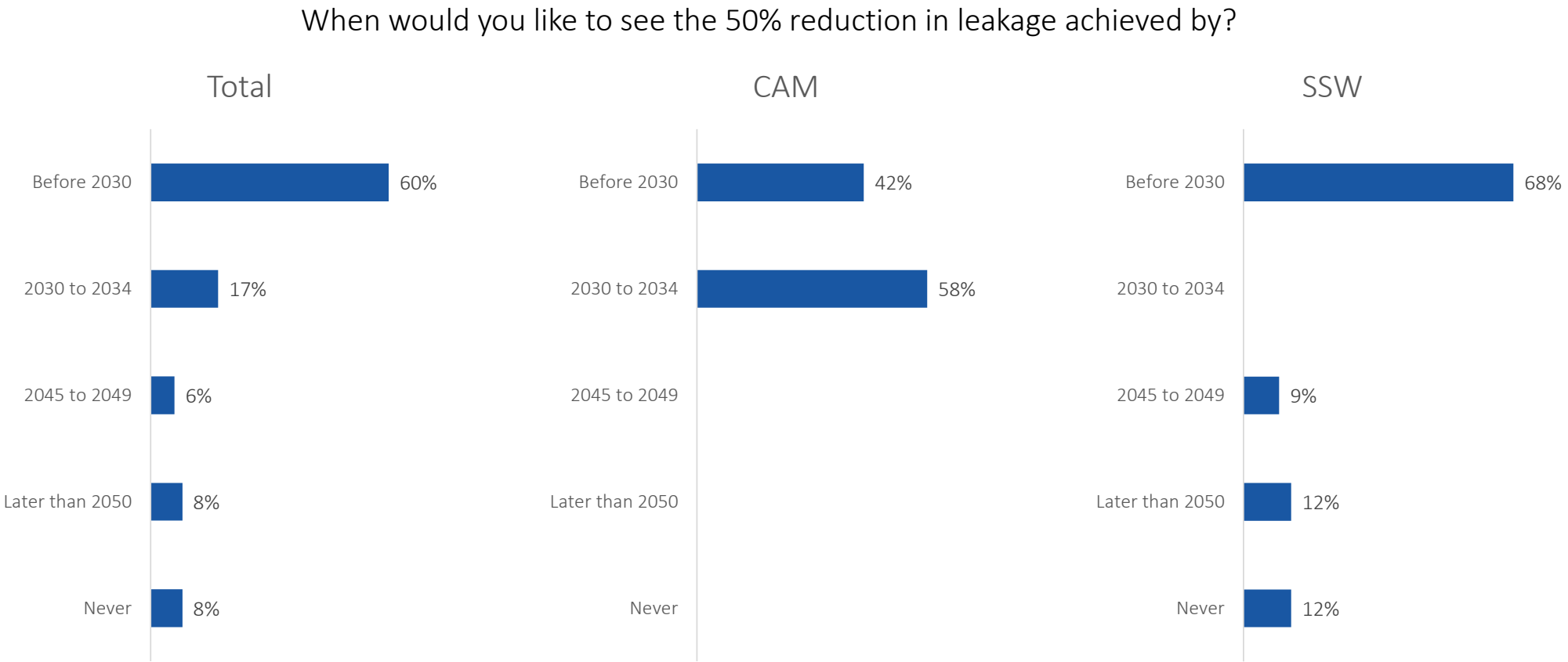


Q56. When would you like #QAREA# to deliver your preferred level of environmental ambition? Those selected too late at previous question (n= 353, CAM: 122, SSW: 231)

Appendix

Those who oppose this national target for reducing leakage:

The small proportion of customers who opposed the national target thought a deadline before 2030 would be a more suitable aim



Q43. When would you like to see the 50% reduction in leakage achieved by? Base: Those who oppose this national target for reducing leakage (n= 12, CAM: 4, SSW: 9) CAUTION: very small base

Fieldwork sample sources by region, social grade and vulnerable status– weighted base size only

	Total	Region		Catchment Area			
		CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Total Weighted	**1,180**	**293**	**887**	**225**	**142**	**562**	**88**
WEB	1,075	264	811	196	140	488	88
% of column total	**91%**	**90%**	**91%**	**87%**	**99%**	**87%**	**100%**
FACE TO FACE	105	29	76	29	2	74	
% of column total	**9%**	**10%**	**9%**	**13%**	**1%**	**13%**	

	SEG			PSR		Bill paying status			On benefit		Vulnerable	
	AB	C1C2	DE	Yes	No	No issue	Struggling	In debt	Yes	No	Yes	No
Total Weighted	**206**	**508**	**279**	**117**	**792**	**791**	**169**	**35**	**300**	**673**	**513**	**667**
WEB	202	496	189	112	693	749	114	26	258	614	428	647
% of column total	98%	98%	68%	96%	88%	95%	67%	75%	86%	91%	83%	97%
FACE TO FACE	3	12	90	5	99	41	55	8	42	60	85	20
% of column total	2%	2%	32%	4%	13%	5%	33%	23%	14%	9%	17%	3%

Accent

Fieldwork sample sources by region, social grade and vulnerable status – unweighted base size only

	Total	Region		Catchment Area			
		CAM	SSW	Cam & Ely Ouse	Severn Middle Worcestershire	Tame Anker & Mease	Trent Valley Staffordshire
Total unweighted	**1,180**	**293**	**887**	**225**	**142**	**562**	**88**
WEB	1,075	264	811	196	140	488	88
% of column total	91%	90%	91%	87%	99%	87%	100%
FACE TO FACE	105	29	76	29	2	74	
% of column total	9%	10%	9%	13%	1%	13%	0%

	SEG			PSR		Bill paying status			On benefit		Vulnerable	
	AB	C1C2	DE	Yes	No	No issue	Struggling	In debt	Yes	No	Yes	No
Total unweighted	**206**	**508**	**279**	**117**	**792**	**791**	**169**	**35**	**300**	**673**	**513**	**667**
WEB	202	496	189	112	693	749	114	26	258	614	428	647
% of column total	68%	68%	68%	96%	88%	95%	67%	74%	86%	91%	83%	97%
FACE TO FACE	3	12	90	5	99	41	55	8	42	60	85	20
% of column total	1%	2%	32%	4%	13%	5%	33%	23%	14%	9%	17%	3%

Accent