



# South Staffs Water WRMP24 Acceptability Testing Wave 1 Report



Full Colour Thinking from Turquoise for South Staffs Water

September 2022

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# Introduction and background.



- South Staffs Water PLC (SSC), incorporating Cambridge Water, supply clean water to roughly 1.6 million people.
- At least every five years, water companies are required to prepare a fully updated water resources management plan (WRMP). This sets out in detail how each supply region plans to meet the demand for water over the least the next 25-year planning period. Both SSC supply regions face challenges around ensuring sustainable long-term demand versus supply balance (SBD) given the impacts of rapid population growth, climate change on rainfall patterns and now the additional impact of increased household consumption (PCC) caused by COVID-19- particularly in the SSW supply region. Overall, the SPD challenge is more acute in the Cambridge region given the challenges faced.
- This research is Wave 1 of Theme 4 of SSC's overall WRMP24 customer engagement programme. The main objective is to measure the acceptability and affordability of the proposed regional plans with household, non-household and future customers.
- Two waves of acceptability testing are planned as part of Theme 4. This first wave covers customer responses to the draft WRMP24 plan. It is designed to provide an initial view of the acceptability and affordability of the plan to help SSC finalise its plan as the consultation process progresses. Wave 2 is planned for Autumn 2023 to test customer responses to the final WRMP24 plan. At this point, the wider bill impacts for SSC's PR24 plan will be known, so that customers can have a full picture of the bill changes from 2025-2030 and then beyond to 2050.



# Specific research objectives.

01



To provide a view **of what is driving acceptability** and/or lack of acceptability of the plans.

02



To determine **whether customers find the SSW/CAM WRMP draft plan acceptable.**  
If there is any misalignment, to understand the reasons for this.

03



To **aid SSC to communicate why the plan is acceptable or unacceptable to each region.**



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**Methodology and Sample.**

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# Methodological Considerations.

- SSC and Turquoise Thinking were cognisant of the necessary trade-off between providing enough information on the proposed WRMP plans for customers to make informed decisions, whilst ensuring that customers could fully understand the stimulus provided and were not overwhelmed by the amount of information.
- As well as ensuring the stimulus found the right balance, it was vital to ensure that all types of customers fully understood the questions used in the survey. Turquoise Thinking, therefore, conducted 12 cognitive interviews with customers across the SSC region (6 in the South Staffs Water area and 6 in the Cambridge Water area) to test both the stimulus and the questionnaire. A summary of the results and key changes can be found on slide 8. Feedback was also sought from SSC's customer panel.
- Another key element of the research was to ensure that the results were robust and as representative of the SSC customer base (in both regions) as possible.
- To achieve a robust sample of household customers in both regions, a hybrid recruitment approach was used. SSC invited a representative selection of customers to take part via email which yielded 261 responses across the SSC region. This was supplemented by a sample of 337 household customers recruited via a commercial panel (Savanta).
- Whilst the panel sample used quotas (based on the latest census information on gender, age and social grade) to ensure a demographically representative sample, the SSC email sample did not use quotas to avoid disappointing customers who wanted to give their feedback.



# Methodological Considerations.

- As such, it was necessary to weight the household data collected to accurately represent the demographics (gender, age and social grade) of the region. Again, the latest available census information was used for this weighting which can be seen on slide 10. The SSC region overall was weighted 70% South Staffs Water to 30% Cambridge Water.
- All 78 non-household customers surveyed were recruited via a commercial panel, this time using Cint, who were preferred due to their ability to source a larger sample. Due to the difficulty in recruiting a robust sample of non-household customers in both regions, no quotas were set as Turquoise Thinking and SSC felt it better to prioritise a larger sample over what would have been a very small representative sample.
- Whilst the overall SSC non-household sample was weighted 70:30 South Staffs Water to Cambridge Water, as with the household sample, no further weighting was applied due to the negative impact on effective sample size this would have caused.
- Also included in the total sample, was representation of future customers – i.e., non-bill paying customers aged 16-24. A maximum sample of 42 was achieved via commercial panel, Savanta. Again, when looking at future customers results, the data was weighted 70:30 South Staffs Water to Cambridge Water – no other weighting was applied to this group.



## Methodological Considerations.

- Turquoise Thinking and SSC also wanted to ensure representation of two other groups – vulnerable customers (either financially, non-financially or transient) and digitally disadvantaged customers who would be less likely, or able, to give their feedback online. Unfortunately, on the eve of the fieldwork – which was due to take place on-street in selected locations in the South Staffs and Cambridge Water regions - the death of Queen Elizabeth II was announced. SSC made the decision to cancel the fieldwork due to the sensitivity of approaching people at the time. At that point, the achieved sample had already captured a representative proportion of vulnerable customers in the SSC region (of over 40% of the total household sample), with digitally disadvantaged customers having the opportunity to give their feedback in Wave 2 of the research.
- All survey responses were captured between 15<sup>th</sup> August and 9<sup>th</sup> September 2022.



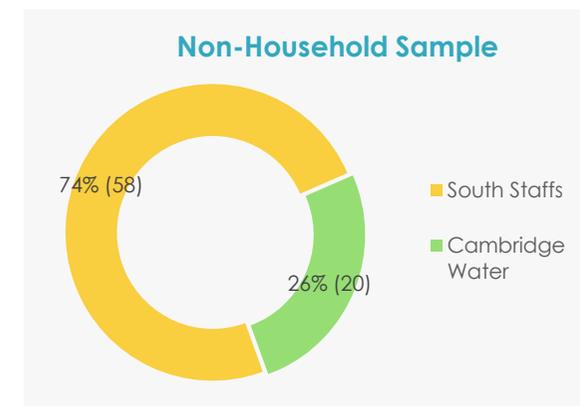
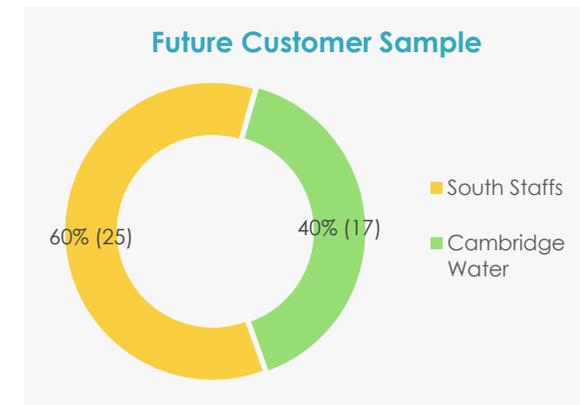
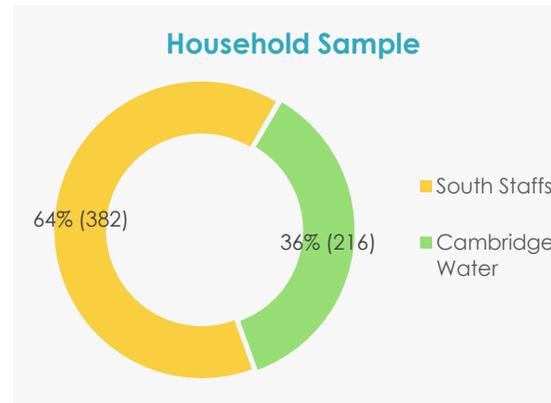
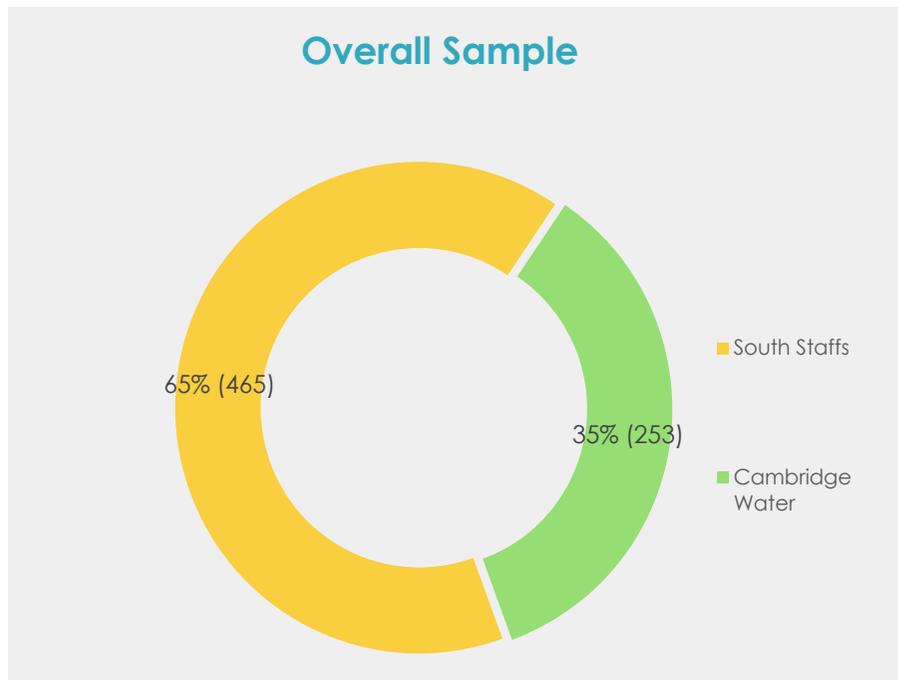
# Cognitive Testing

- Across the 12 cognitive interviews undertaken, all respondents found the questionnaire and associated stimulus 'easy to understand' (42% quite easy and 52% very easy).
- Despite this, there were several areas throughout the questionnaire where improvements to the survey were made based on the feedback. For the most part, these improvements were small wording changes and additional clarification.
- Some customers found it difficult to split the clean and wastewater elements of their bill – all customers felt more confident accurately giving their combined clean water and wastewater bill. Therefore, when asking for customers to give their bill we asked for the combined water and wastewater bill (either per month or year) and calculated the clean water only element for them within the survey.
- Also included, was a stimulus slide explaining how their combined water and wastewater bill is split and what proportion goes to SSC as their water only provider.
- The overarching feedback on the plan stimulus slides was that it was too much to read and that some terms were complex. Turquoise Thinking and SSC worked to reduce the length, whilst retaining the balance of providing enough information. Additional bolding was used to pull out the key elements for customers to absorb and certain terms were reworded to be more understandable.
- A link to the summary cognitive report, questionnaires and stimulus can be found in the Appendix, slide 116.



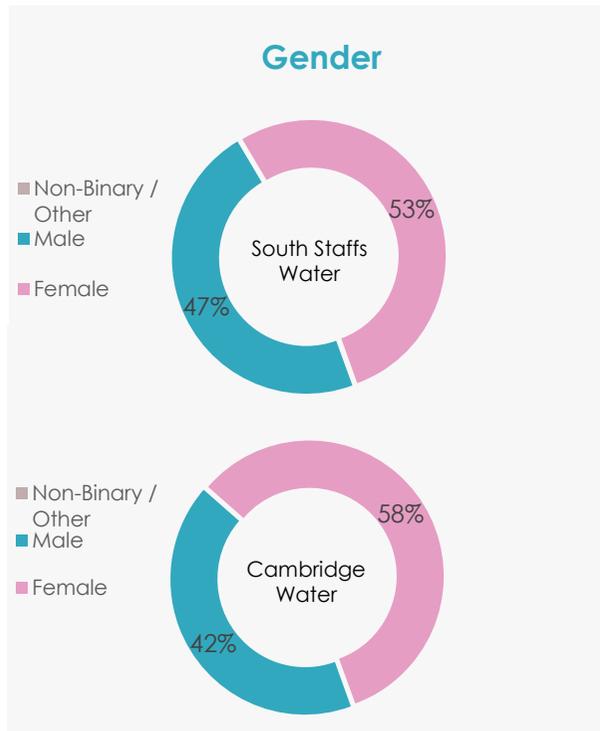
# Sample Summary.

- The total number of customers surveyed was 718 – 598 household customers; 78 non-household (business) customers; 42 future customers (non-bill payers aged 16-24).
- Note that these are the raw, unweighted, sample splits achieved.

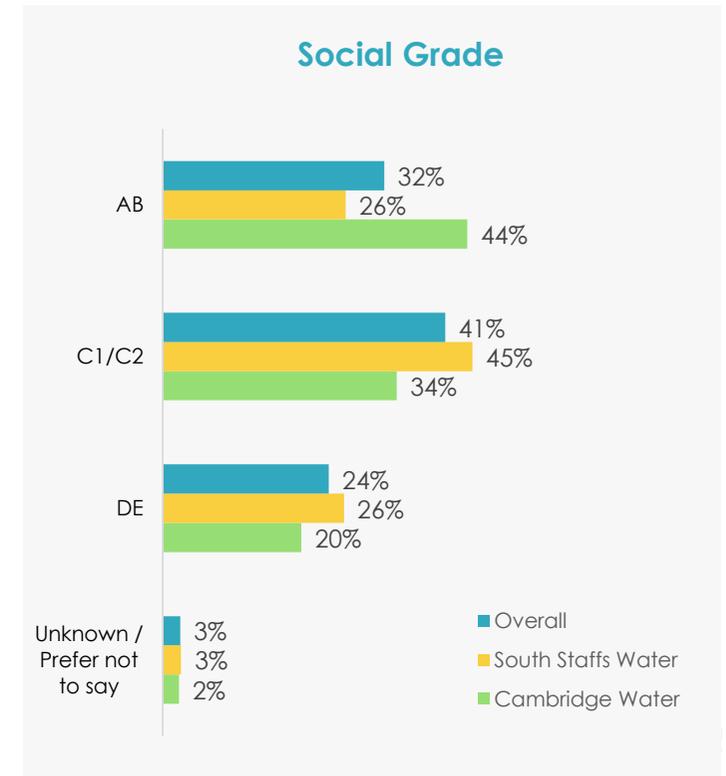
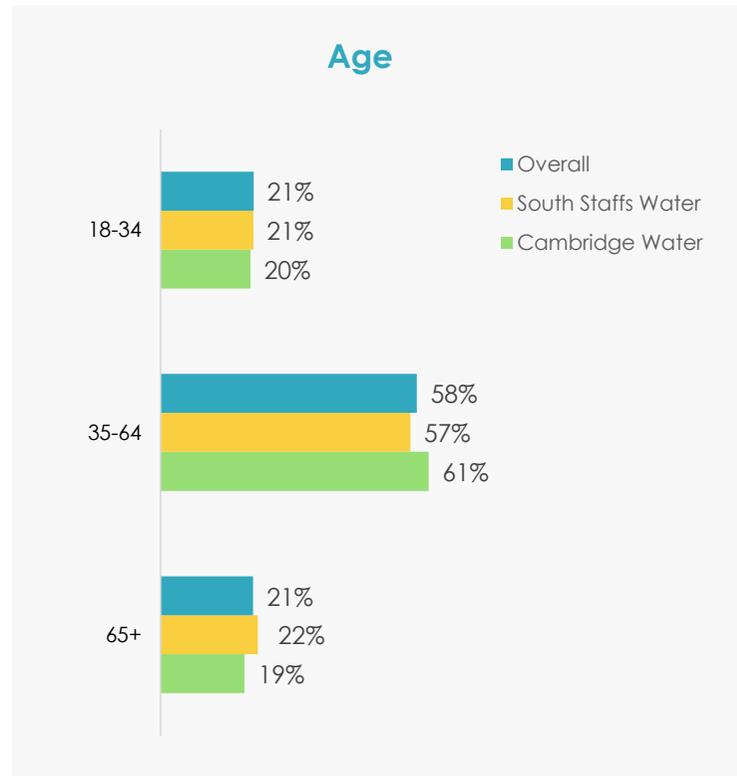


# Household Sample Demographics (Unweighted).

- The percentages below are unweighted and represent the actual demographic split of respondents surveyed.
- Note that the social grade split also includes an estimate of social grade for respondents who are retired. This was estimated by asking whether retired respondents have a private pension and what the chief income earner's occupation type was before retiring.

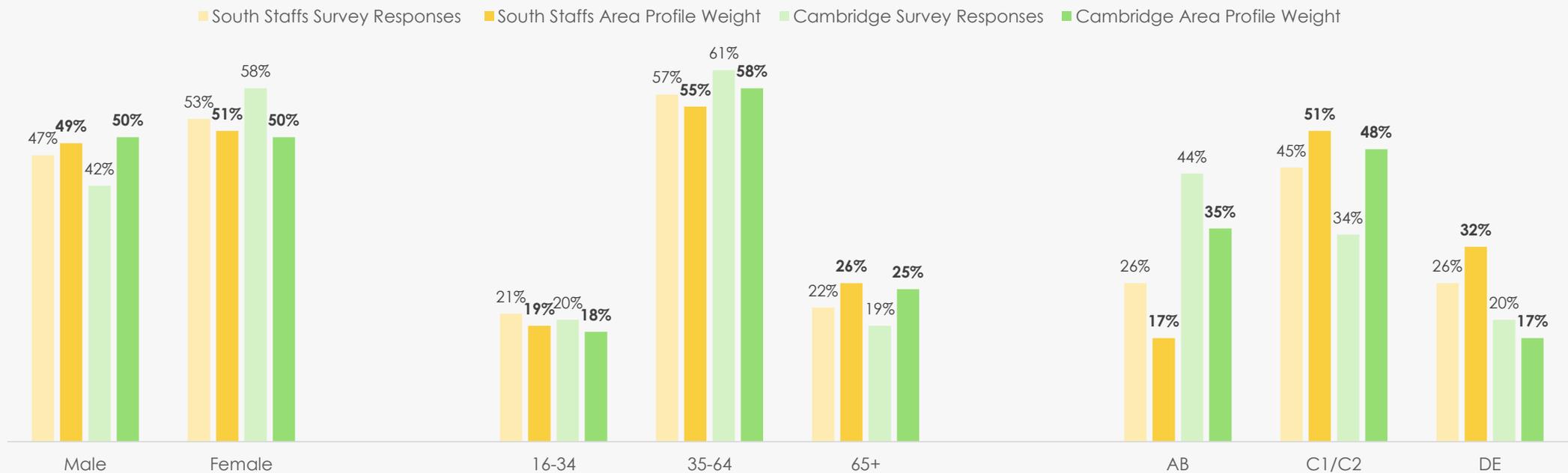


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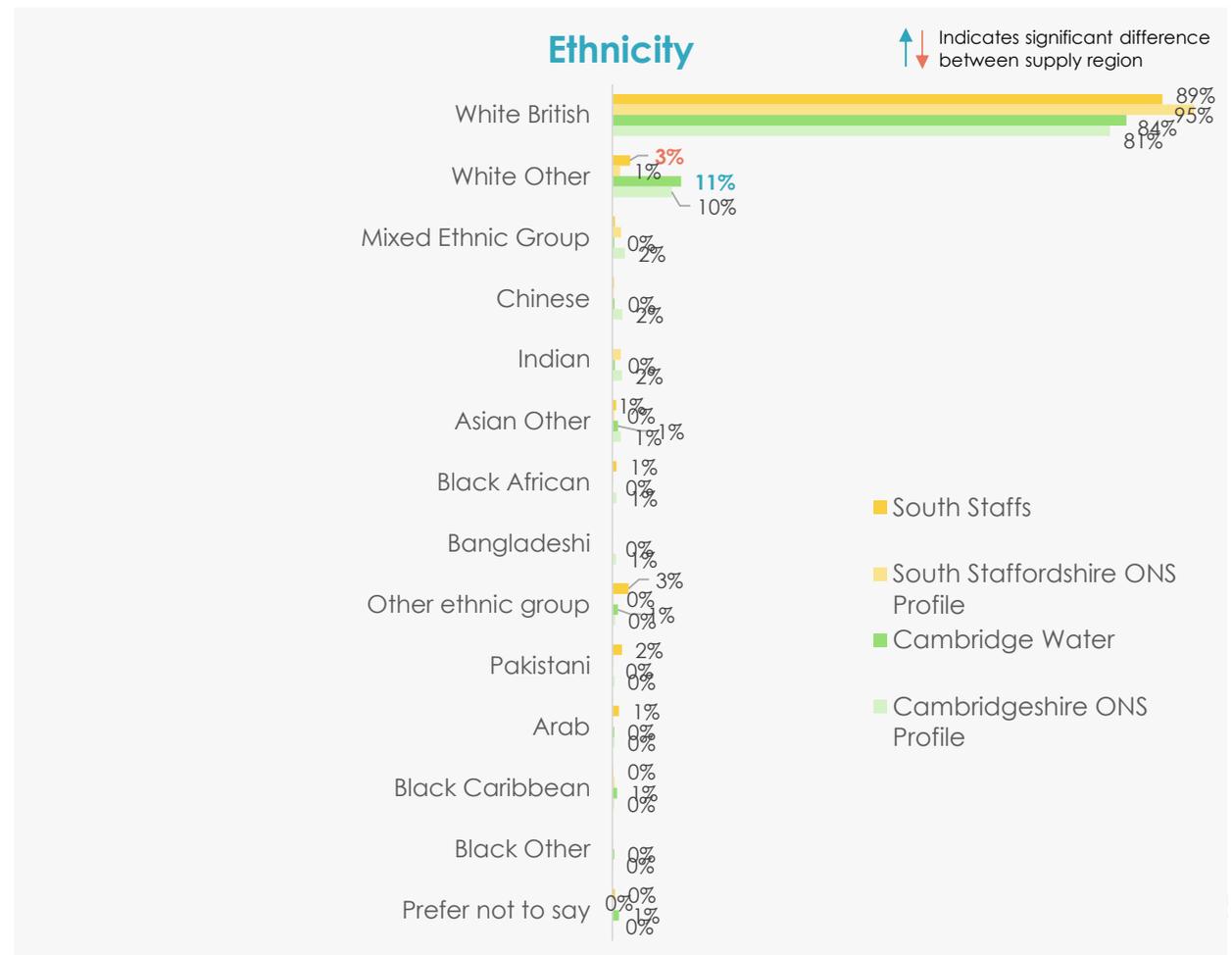
# Weighted Household Sample Demographics.

- The below chart shows the demographic split of achieved interviews and the actual demographic profile of the area based on ONS data.
- When looking at results for by individual company, the data has been weighted to represent the actual demographic profile shown below.
- When looking at results on an overall SSC household level, the below profile was weighted 70:30 South Staffs Water to Cambridge Water.



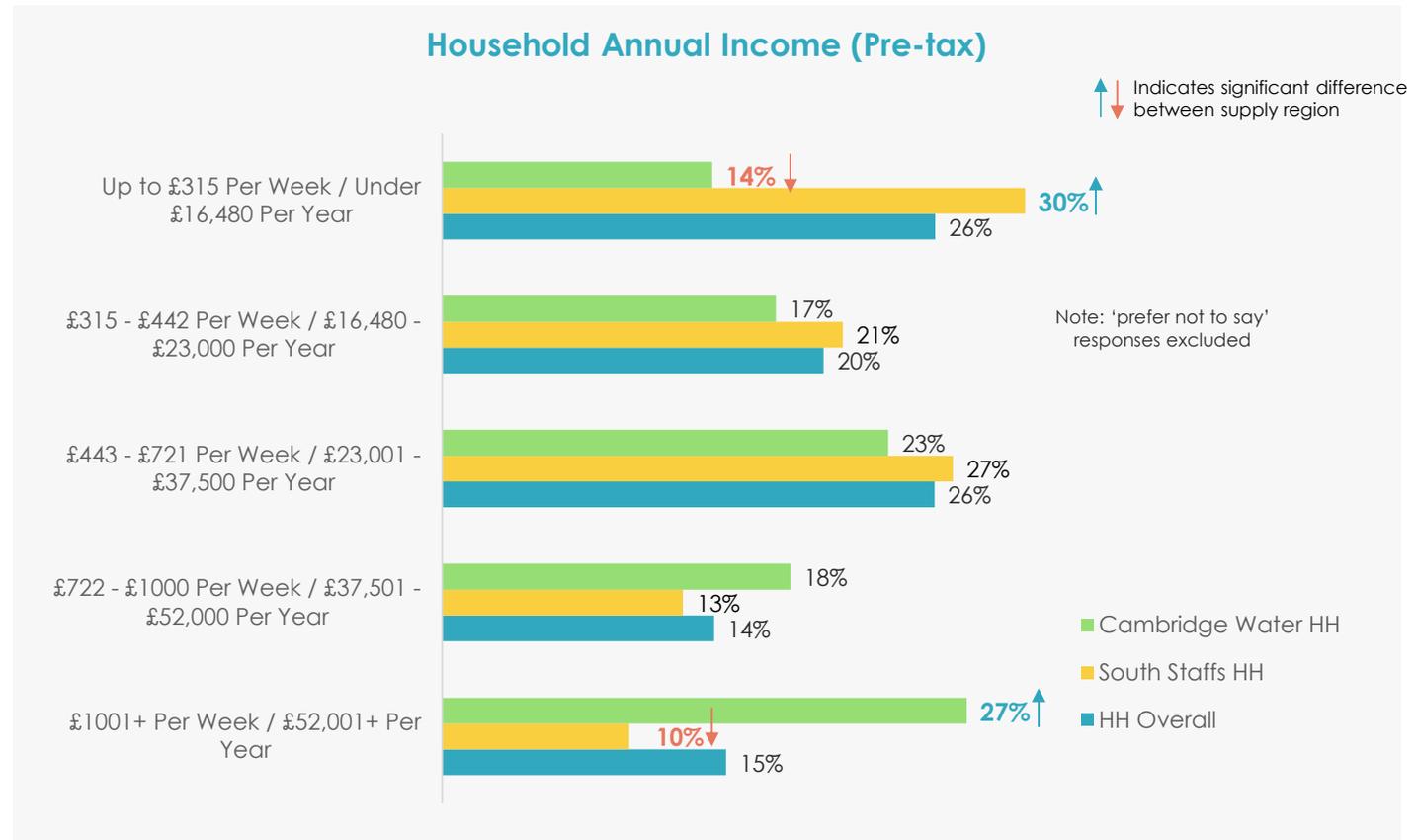
# Household Sample Demographics - Ethnicity.

- 88% of household respondents across the SSC region were White British.
- There was a significantly higher proportion of respondents from Other White Ethnic Groups in the Cambridge Water region (11%) which matches our regional estimates based on ONS data.
- Note that, the ethnicity profile is based on South Staffordshire and Cambridgeshire, therefore, may differ from the actual supply area profiles.



# Household Sample Demographics - Annual household income.

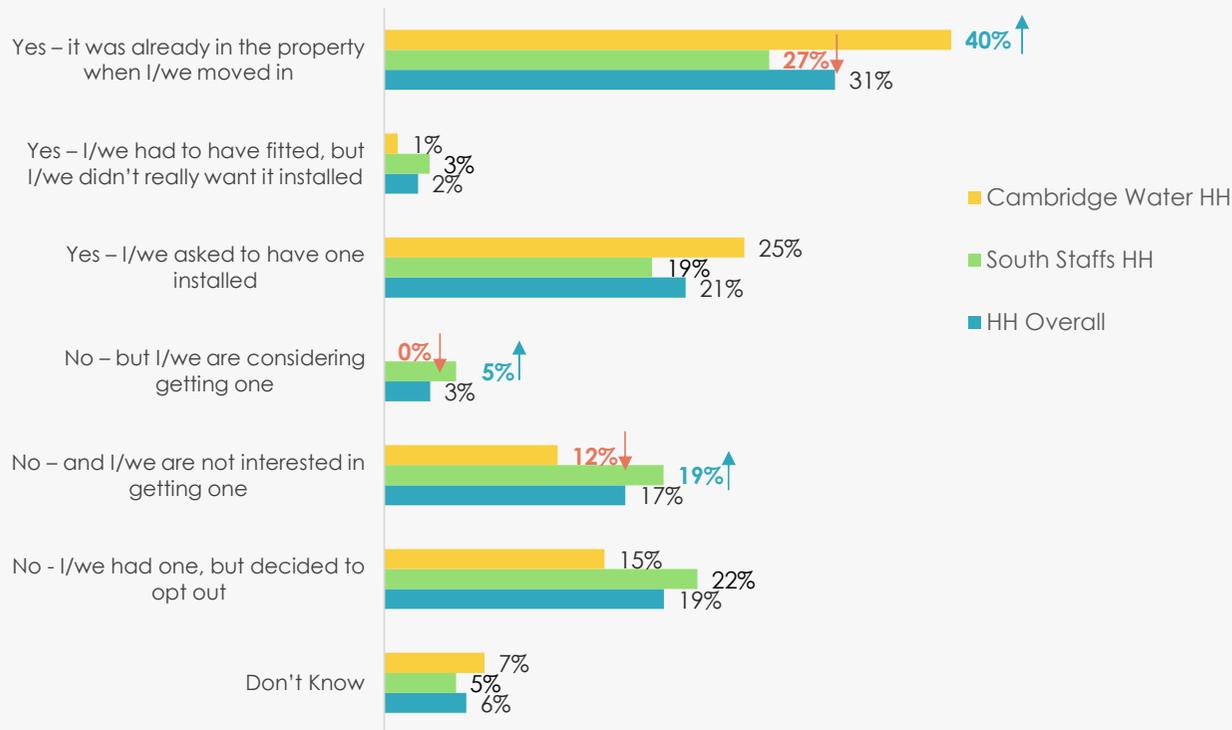
- There were significant differences in household income, with Cambridge Water customers having a significantly higher income profile than South Staffs customers. 27% of Cambridge Water customers were in the highest household income bracket, almost three times the proportion of South Staffs customers (10%). In turn, there was twice as many South Staffs customers (30%) in the lowest income bracket than Cambridge Water customers (14%).



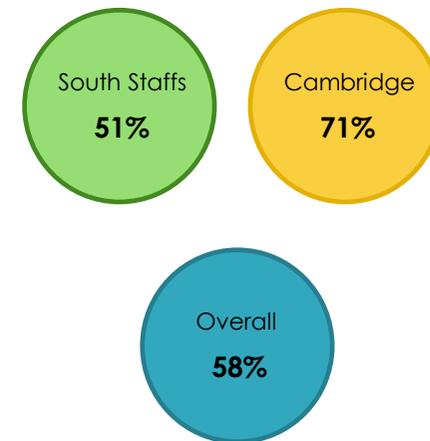
# Household Sample Demographics – Metering.

## Water Meter Status

↑ ↓ Indicates significant difference between supply region



## Metered customers in the Sample



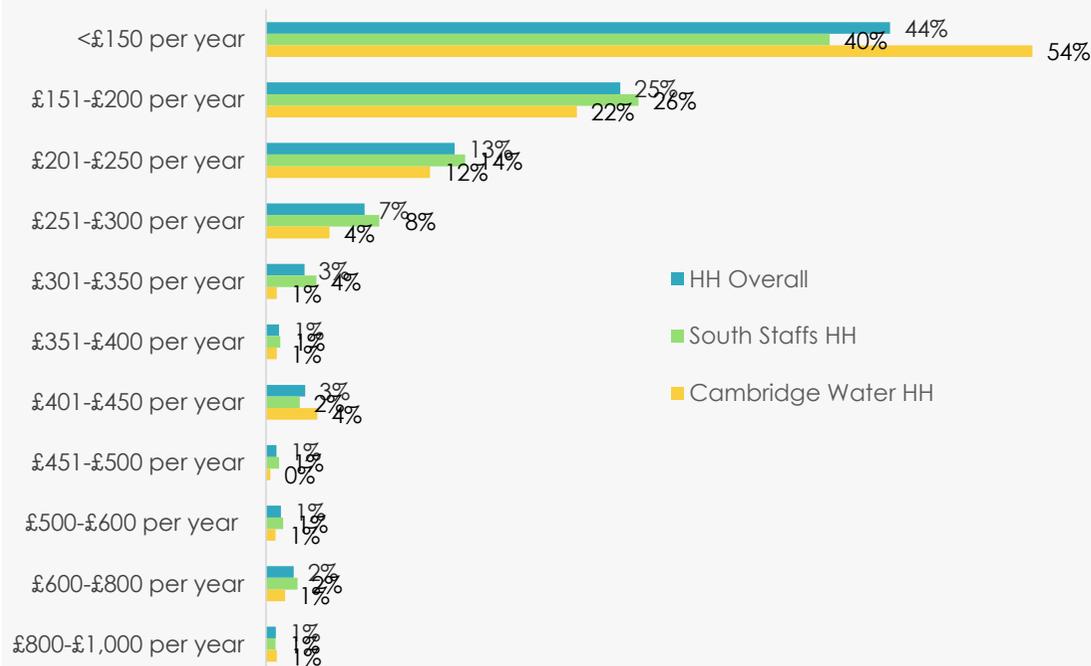
Actual meters rates:

- SSW: 45%
- Cambridge 75%

# Household Sample Demographics – Household Bills.

- Respondents were asked to enter their total water and wastewater bill amount (either monthly or annual), from this we calculated within the survey their current clean water bill only (for South Staffs or Cambridge) to use in subsequent questions. Below are the categorised and average annual clean water bill amounts given by household customers.
- Note that, on average, customers indicated a higher-than-average bill in both regions.

Annual Bill Categorised



Claimed Average Annual Bill



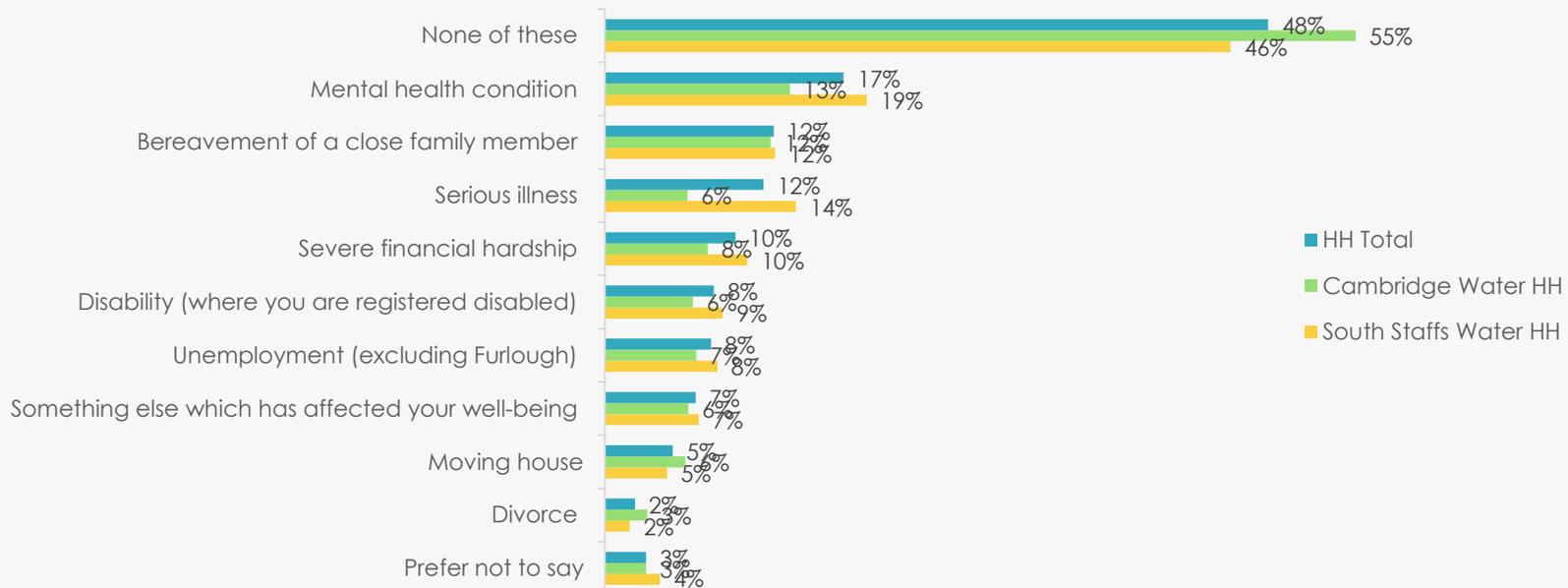
Actual average bills:

- SSW: £161
- Cambridge £148

# Household Sample Demographics - Personal Circumstances and Vulnerability.

- Whilst there were no significant differences in individual personal circumstances by region, there were regional differences in the proportion of customers considered 'vulnerable' (49% South Staffs : 27% Cambridge Water). These customers satisfy at least one of the following criteria: serious illness, disability (registered disabled), severe financial hardship, unemployed, a household income of less than £17,005 per year, and/or retired with only a state pension.
- Across the SSC region, 43% of respondents were 'vulnerable' which is in line with the expected proportion. It should be noted that vulnerable customers were significantly less likely to find the informed plan acceptable (56%).

Can you tell me if in the last 12 months, if you or anyone in your household has experienced any of the following?



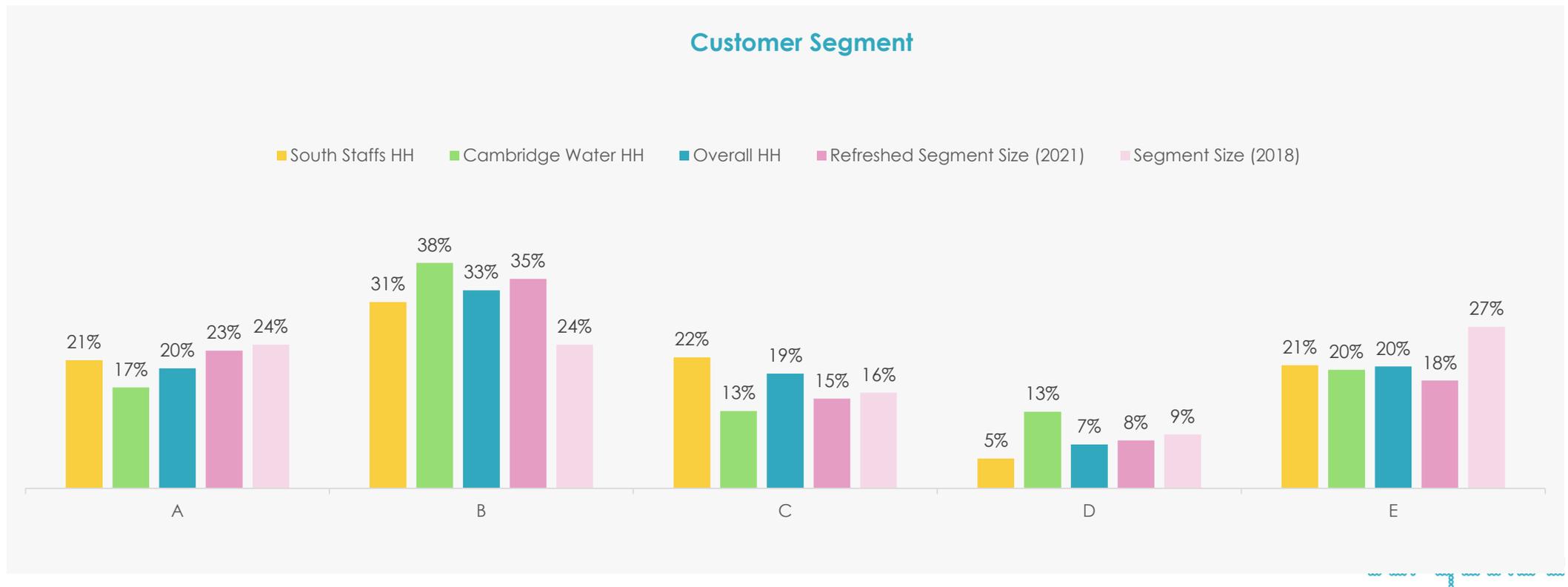
# Household Sample Demographics (Customer Segments).

- The below chart table provides a brief overview of SSC's customer segments which have been used to aid in the analysis of these results.

Customer Segment	Overview of Segment
<b>A</b> (23% of SSC's customer base)	Very time-pressed juggling all their commitments. Consequently, don't think much about their water usage and don't want their time wasted. Often online.
<b>B</b> (35%)	Highly engaged with their water usage and the wider community they live in. Expect a very high level of service from companies they use. Use technology but prefer a personal relationship.
<b>C</b> (15%)	Often financially and time pressured. Strong preference for being online and using social media.
<b>D</b> (8%)	Highly engaged with using the 'latest' technology and managing their lives online.
<b>E</b> (18%)	Highly engaged with technology and very focussed on their network of family and friends. Admit to not thinking about their water usage or services and prefer a more transactional relationship with their water company.

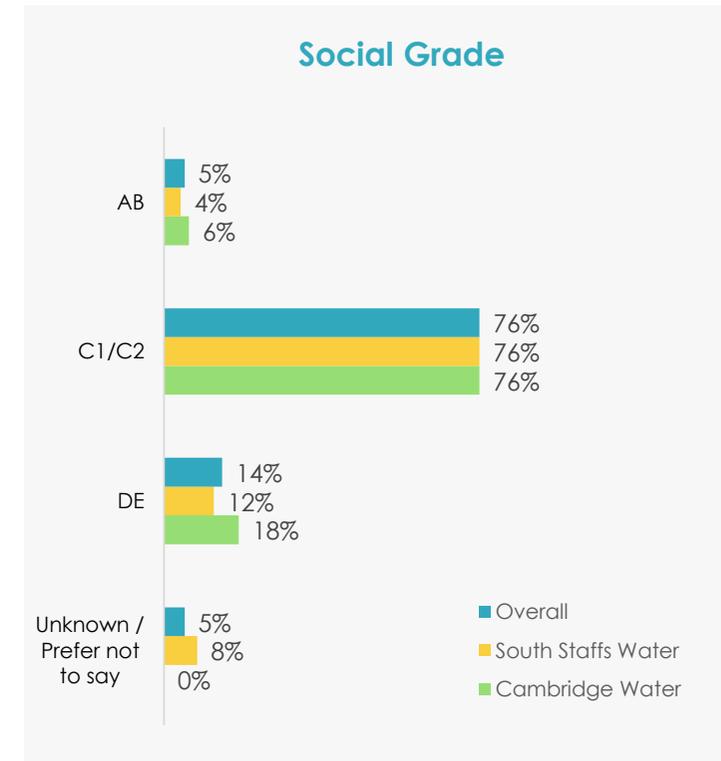
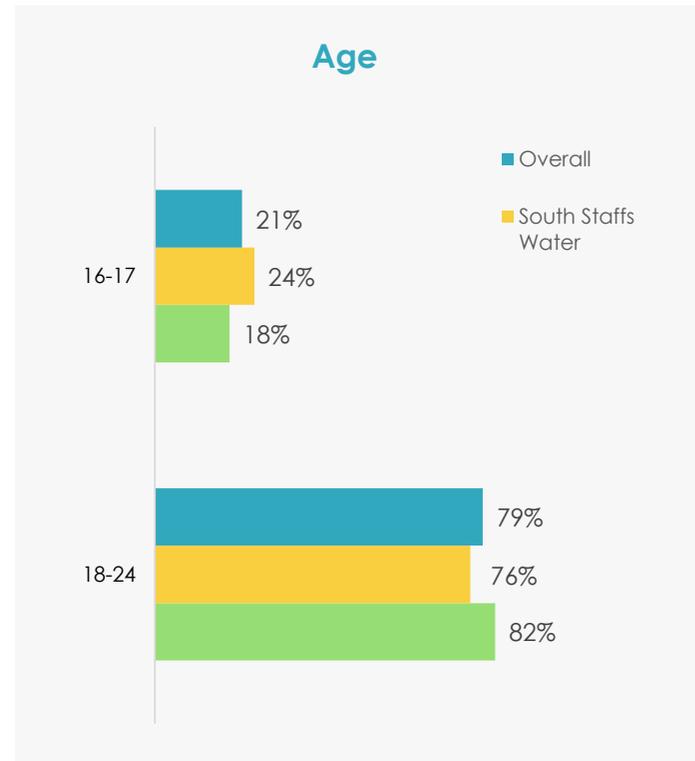
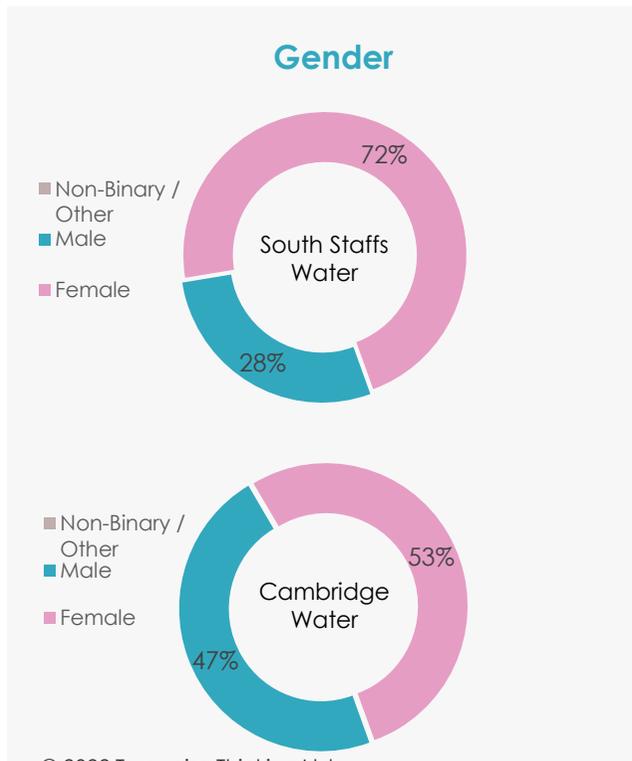
# Household Sample Demographics (Attitudinal Segments).

- The below chart shows the split of achieved interviews by attitudinal segment.
- Overall, the segment proportions achieved within the sample are broadly inline with the 2021 refreshed customer splits.



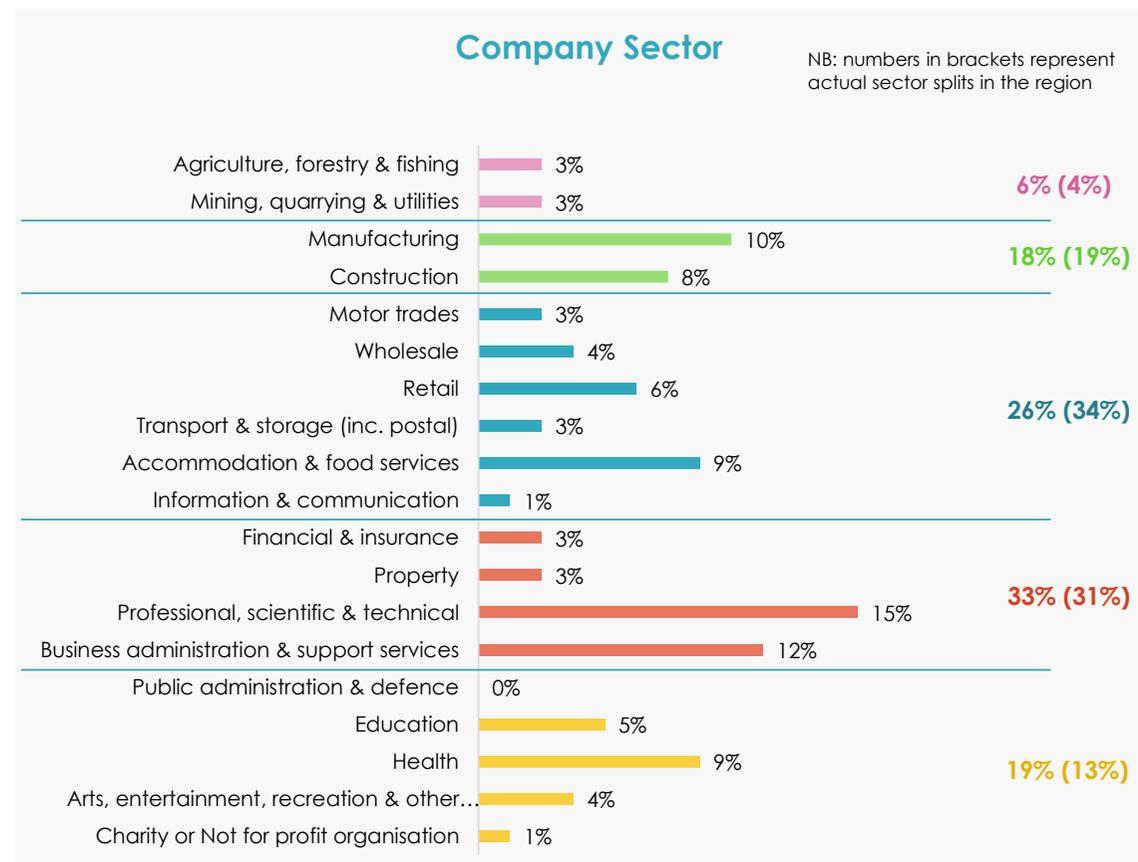
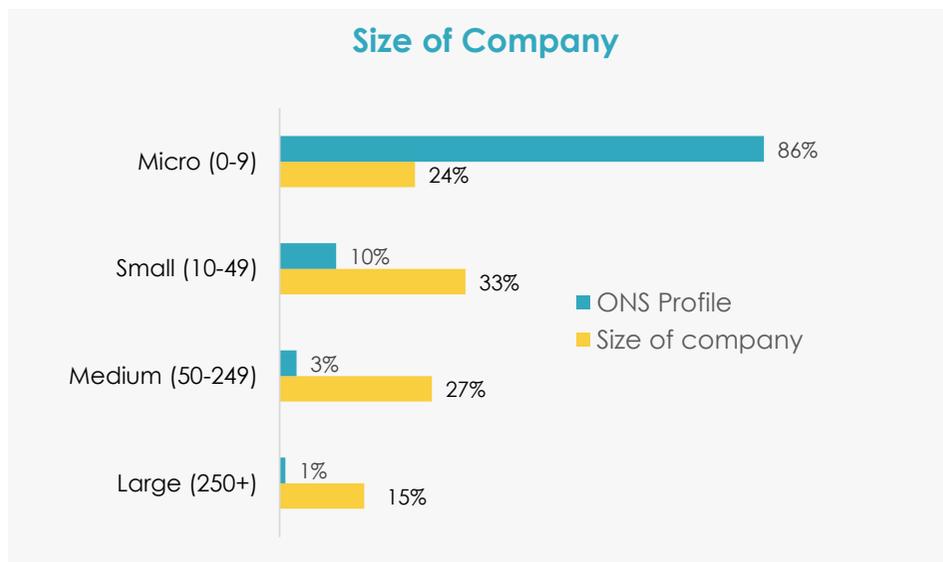
# Future Customers Sample Demographics.

- The percentages below are unweighted and represent the actual demographic split of respondents surveyed.
- All future customers surveyed are non-bill-payers – 90% living at home with their parent(s) / guardian(s).
- Social grade C1 includes students of which half of the future customer sample were (44% in South Staffs and 59% in Cambridge).
- Note that, when looking at results by the SSC region as a whole (South Staffs Water and Cambridge Water) for future customers, the data is weighted 70:30, South Staffs Water : Cambridge Water.



# Non-Household Sample Demographics.

- The figures on this slide are unweighted and represent the demographic split of respondents' businesses surveyed versus the actual split within the region.
- Due to the nature of the survey, and the required viewing of the plan stimulus, the survey could only be completed online. Achieving a reasonable sample and representative split by size of company by this method is notoriously difficult. To achieve as robust a sample as possible, we had to accept the natural fall-out of size of business.
- Despite the size of business profile, the company sector split achieved is close to the actual region profile.
- Note that, when looking at results by the SSC region as a whole (South Staffs Water and Cambridge Water) for NHH customers, the data is weighted 70:30, South Staffs Water : Cambridge Water.





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**Key Findings.**

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# Key Findings – Overview

		% Response	
		Unacceptable (%) / Unaffordable (%)	Acceptable (%) / Affordable (%)
SSC HH Overall	Uninformed Plan	11%	71%
	Informed Plan	18%	63%
	Plan Affordability	25%	48%
	Adaptive Planning	9%	66%
South Staffs HH	Uninformed Plan	10%	71%
	Informed Plan	18%	62%
	Plan Affordability	27%	43%↓
	Adaptive Planning	9%	65%
Cambridge HH	Uninformed Plan	12%	73%
	Informed Plan	18%	67%
	Plan Affordability	21%	59%↑
	Adaptive Planning	7%	71%

## Key Findings – Perceptions of SSC

- Firstly, it should be noted when looking at the results to this study that both the household and non-household samples reported significantly lower perception scores than would be expected.
- Satisfaction with overall service was just 61% for household customers in this research. This year-to-date in comparable research, satisfaction with overall service is 84% (76% when isolating those completing via the same online methodology).
- Trust scores were similarly low, with just 62% indicating that they trust SSC. This figure is 20% lower than the figure recorded in comparable research via the same methodology.
- Finally, current bill affordability was also significantly lower at 54% (63% in comparable research this year).
- Whilst it's possible that these results are a true reflection of perceptions, given the current turbulent times – particularly around utilities – it's also possible that the nature / subject matter of the research has had an impact in terms of customers self-selecting to take part.
- As a crude example, adjusting the data to the overall service scores collected this year in comparable research, uninformed plan acceptability rises by 3%; informed acceptability rises by 4%; and plan bill affordability rises by 3%.



# Key Findings – Uninformed Plan Acceptability

HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	9.96%	70.71%
CAM region	11.78%	73.03%
Male	12.73%	68.75%
Female	8.34%	73.99%
18-24	8.11%	68.07%
25-34	3.95%	82.56%
35-44	14.77%	70.73%
45-54	9.20%	68.43%
55-64	11.41%	72.11%
65+	11.45%	67.44%
SEG AB	9.80%	78.74%
SEG C1	12.52%	72.54%
SEG C2	6.68%	73.99%
SEG DE	11.82%	62.29%
<b>SSC Overall</b>	<b>10.50%</b>	<b>71.40%</b>

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	5.17%	84.48%
CAM region	0%	80%
<b>SSC Overall</b>	<b>3.62%</b>	<b>83.14%</b>

FUTURE CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	12%	60%
CAM region	0%	70.59%
<b>SSC Overall</b>	<b>8.40%</b>	<b>63.18%</b>

Note: no significant differences by region or demographic

# Key Findings – Uninformed Plan Acceptability

HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	9.96%	70.71%
CAM region	11.78%	73.03%
Metered	7.95%	75.85%
Unmetered	14.53%	65.17%
HH income <=£23k	10.54%	68.06%
HH income >£23k-£52k	10.60%	80.44% ↑
HH income >£52k	8.57%	80.01%
Segment A	9.20%	73.23%
Segment C	10.58%	72.81%
Segment E	13.49%	56.23% ↓
Segment B	9.11%	76.72%
Segment D	12.97%	80.84%
PSR Vulnerable	10.92%	67.77%
Non-PSR-Vulnerable	10.20%	74.09%
White	10.47%	72.10%
BAME	12.91%	61.46%

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	5.17%	84.48%
CAM region	0.00%	80.00%
Micro (0-9 employees)	10.14%	68.36%
Small (10-49 employees)	3.55%	84.09%
Medium (5-249 employees)	0.00%	90.01%
Large (250+ employees)	0.00%	91.99%
Water essential	9.76%	48.81% ↓
Water not essential	2.75%	87.98% ↑

## Key Findings – Uninformed Plan Acceptability

- Positively, just over 7 out of 10 household customers (71%) believed the plan acceptable based on the uninformed stimulus. The main spontaneous reasons given for finding the plan acceptable amongst household customers was that 'the plan is necessary to meet demand / changing climate' (24%) and that the plan is 'inexpensive / acceptable increase / value for money' (15%).
- Non-household customers found the plan more acceptable than household customers based on the uninformed stimulus – 83% overall.
- Future customers found the plan least acceptable based on the uninformed stimulus – 63% overall.



# Key Findings – Informed Plan Acceptability



↑↓ Indicates significant difference between group

HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	18.43%	61.86%
CAM region	18.42%	66.93%
Male	23.07%	56.43%
Female	13.90%	70.15%
18-24	23.28%	53.61%
25-34	19.90%	66.60%
35-44	17.20%	58.47%
45-54	14.88%	60.12%
55-64	20.08%	62.16%
65+	10.14%	70.16%
SEG AB	14.20%	76.07% ↑
SEG C1	16.70%	64.54%
SEG C2	21.61%	62.89%
SEG DE	21.29%	52.22%
<b>SSC Overall</b>	<b>18.42%</b>	<b>63.38%</b>

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	12.07%	72.41%
CAM region	5.00%	70.00%
<b>SSC Overall</b>	<b>9.95%</b>	<b>71.69%</b>

FUTURE CUSTOMERS	UNACCEPTABLE	ACCEPTABLE
SS region	12.00%	48.00%
CAM region	0.00%	64.71%
<b>SSC Overall</b>	<b>8.40%</b>	<b>53.01%</b>

# Key Findings – Informed Plan Acceptability

HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	18.43%	61.86%
CAM region	18.42%	66.93%
Metered	16.60%	66.19%
Unmetered	21.20%	60.81%
HH income <=£23k	24.97%	57.39%
HH income >£23k-£52k	12.02%	71.22%
HH income >£52k	12.34%	78.68%
Segment A	16.93%	66.47%
Segment C	22.56%	62.33%
Segment E	24.92%	44.93% ↓
Segment B	13.96%	70.38%
Segment D	13.84%	77.30%
PSR Vulnerable	23.84%	56.37%
Non-PSR-Vulnerable	14.41%	68.57%
White	17.25%	64.58%
BAME	31.60%	47.93%

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	12.07%	72.41%
CAM region	5.00%	70.00%
Micro (0-9 employees)	15.21%	63.29%
Small (10-49 employees)	7.96%	76.13%
Medium (5-249 employees)	4.45%	76.65%
Large (250+ employees)	16.02%	66.02%
Water essential	9.76%	51.19%
Water not essential	9.97%	74.59%

## Key Findings – Informed Plan Acceptability

- Informed acceptability amongst customers (overall sample) was lower than uninformed acceptability (64%).
- Household customers reported 63% informed acceptability, with the score slightly higher in the Cambridge Water region (67%). Household customers with an AB social grade were significantly more likely to score the plan acceptable based on the informed stimulus (76%), as were customers in the highest household income bracket of £52,001+ per year (79%). On the other hand, customers with a DE social grade were significantly less likely to find the plan acceptable (52%).
- Non-household customers and future customers also scored lower for informed acceptability than uninformed acceptability – 72% NHH and 62% for future customers.
- The key (household) reason selected for finding the plan acceptable was that customers 'support what they (SSC) are trying to do in the long term' (67%). The secondary reason was that the 'plan seems to focus on the right areas' (59%).
- The key (household) reasons for not finding the plan acceptable centred around cost with four of the top 5 reason about affordability. The most common reason cited was 'company profits too high already' which matches with some of the open text comments given for the uninformed plan.



# Key Findings – Informed Plan Affordability

↑↓ Indicates significant difference between group

HOUSEHOLD CUSTOMERS	UNAFFORDABLE (1 or 2 scores)	AFFORDABLE (4 or 5 scores)
SS region	26.95%	43.42% ↓
CAM region	20.68%	58.63% ↑
Male	28.35%	48.96%
Female	21.87%	47.03%
18-24	43.32%	34.44%
25-34	28.78%	49.43%
35-44	28.62%	47.54%
45-54	30.43%	47.82%
55-64	19.91%	50.13%
65+	16.33%	48.16%
SEG AB	12.98% ↓	67.56% ↑
SEG C1	25.60%	50.77%
SEG C2	22.52%	40.55%
SEG DE	36.24% ↑	34.73% ↓
<b>SSC Overall</b>	<b>25.07%</b>	<b>47.98%</b>

Note: not a significantly low score as small sample of 20 Cam NHH surveys

NON-HOUSEHOLD CUSTOMERS	UNAFFORDABLE (1 or 2 scores)	AFFORDABLE (4 or 5 scores)
SS region	24%	52%
CAM region	29.41%	17.65%
<b>SSC Overall</b>	<b>25.62%</b>	<b>41.69%</b>

FUTURE CUSTOMERS	UNAFFORDABLE (1 or 2 scores)	AFFORDABLE (4 or 5 scores)
SS region	17.24%	60.34%
CAM region	30%	60%
<b>SSC Overall</b>	<b>21.07%</b>	<b>60.24%</b>

# Key Findings – Informed Plan Affordability

HOUSEHOLD CUSTOMERS	UNAFFORDABLE (1 or 2 scores)	AFFORDABLE (4 or 5 scores)
SS region	26.95%	43.42% ↓
CAM region	20.68%	58.63% ↑
Metered	19.39% ↓	51.77%
Unmetered	34.27% ↑	42.70%
HH income <=£23k	31.50%	41.46%
HH income >£23k-£52k	22.17%	54.01%
HH income >£52k	11.61% ↓	76.71% ↑
Segment A	27.78%	52.39%
Segment C	27.34%	42.56%
Segment E	34.95%	33.10% ↓
Segment B	18.73%	51.85%
Segment D	12.90%	73.98% ↑
PSR Vulnerable	35.69% ↑	37.35% ↓
Non-PSR-Vulnerable	17.20% ↓	55.86% ↑
White	24.29%	48.58%
BAME	36.76%	40.11%

NON-HOUSEHOLD CUSTOMERS	UNAFFORDABLE (1 or 2 scores)	AFFORDABLE (4 or 5 scores)
SS region	17.24%	60.34%
CAM region	30.00%	60.00%
Micro (0-9 employees)	20.28%	64.52%
Small (10-49 employees)	33.55%	51.39%
Medium (5-249 employees)	8.91%	72.20%
Large (250+ employees)	16.02%	51.95%
Water essential	29.29%	19.53% ↓
Water not essential	19.91%	65.98% ↑

## Key Findings – Informed Plan Affordability.

- Just under half (48%) of household customers agreed that their future bill will be affordable (6%p lower than the proportion of the sample who currently find their bill affordable). A further 24% answered neither/nor (5%p higher than the proportion who gave this response for their current bill).
- Customers in the Cambridge Water region were significantly more likely to agree that their future bill will be affordable (59%) than South Staffs Water customers (43%).
- A quarter of household customers (25%) disagreed that their future charges will be affordable (the same proportion who disagreed that their current bill is affordable).
- Customers with an AB social grade were significantly more likely to find their future bill affordable (67%); whereas a significantly low 35% of customers with a DE social grade believe their future bill affordable.
- The future bill, and its increase, didn't impact affordability for non-household customers with the same proportion (60%) agreeing that it will be affordable for their organisation.
- Future customers were more likely to agree that their future bill was affordable than current bills; however, the figure was only 42% - up from 28%. Of course, none of this group are current bill payers so there is a lack of knowledge having an impact.



# Key Findings – Adaptive Plan Acceptability



↑↓ Indicates significant difference between group

HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	9.22%	64.65%
CAM region	7.07%	70.58%
Male	10.21%	65.92%
Female	6.99%	66.92%
18-24	8.74%	64.22%
25-34	6.29%	70.24%
35-44	12.35%	60.91%
45-54	7.90%	67.33%
55-64	12.28%	63.42%
65+	4.95%	70.39%
SEG AB	10.64%	71.29%
SEG C1	9.49%	72.71%
SEG C2	6.29%	66.83%
SEG DE	7.66%	55.51%
<b>SSC Overall</b>	<b>8.58%</b>	<b>66.43%</b>

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	13.79%	70.69%
CAM region	10%	75%
<b>SSC Overall</b>	<b>12.66%</b>	<b>71.98%</b>

FUTURE CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	16%	48%
CAM region	0%	64.71%
<b>SSC Overall</b>	<b>11.20%</b>	<b>53.01%</b>

# Key Findings – Adaptive Plan Acceptability

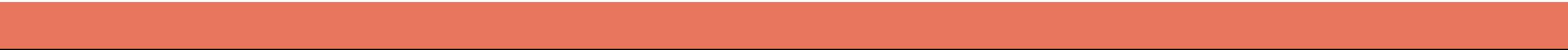
HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	9.22%	64.65%
CAM region	7.07%	70.58%
Metered	7.58%	69.37%
Unmetered	10.48%	61.92%
HH income <=£23k	7.33%	61.51%
HH income >£23k-£52k	9.90%	73.05%
HH income >£52k	5.95%	82.99% ↑
Segment A	4.17%	63.78%
Segment C	10.16%	69.56%
Segment E	11.26%	55.66%
Segment B	8.13%	70.56%
Segment D	11.03%	76.72%
PSR Vulnerable	8.03%	60.36%
Non-PSR-Vulnerable	8.98%	70.92%
White	8.38%	66.37%
BAME	13.05%	62.51%

NON-HOUSEHOLD CUSTOMERS	UNACCEPTABLE (1 or 2 scores)	ACCEPTABLE (4 or 5 scores)
SS region	13.79%	70.69%
CAM region	10.00%	75.00%
Micro (0-9 employees)	31.64%	53.15%
Small (10-49 employees)	7.10%	81.40%
Medium (5-249 employees)	9.99%	70.04%
Large (250+ employees)	0.00%	83.98%
Water essential	19.53%	51.19%
Water not essential	11.69%	74.92%

## Key Findings – Adaptive Planning Acceptability

- Overall, two-thirds of household customers (66%) found the use of adaptive planning acceptable. Cambridge Water customers were slightly more likely to find the use of adaptive planning acceptable (71% vs. 65% South Staffs). Household customers with the highest household income bracket of £52,001+ per year were significantly more likely to find this approach acceptable (83%).
- The main reasons given by household customers who found concept of adaptive planning acceptable were that the adaptive plan / having an adaptive plan is required/sensible – particularly given the uncertainty around changing climate and demand estimates. This response was cited by 60% of household customers who found adaptive planning acceptable.
- The key reasons for household customer who didn't find the concept of adaptive planning acceptable centred around the cost of the plan rather than its detail.
- 72% of non-household customers found the use of adaptive planning acceptable, with little difference by supply region.
- Future customers found the concept of adaptive planning least acceptable – 53% overall – however, there is likely a lack of knowledge having an impact with relatively high levels of 'don't know' responses.





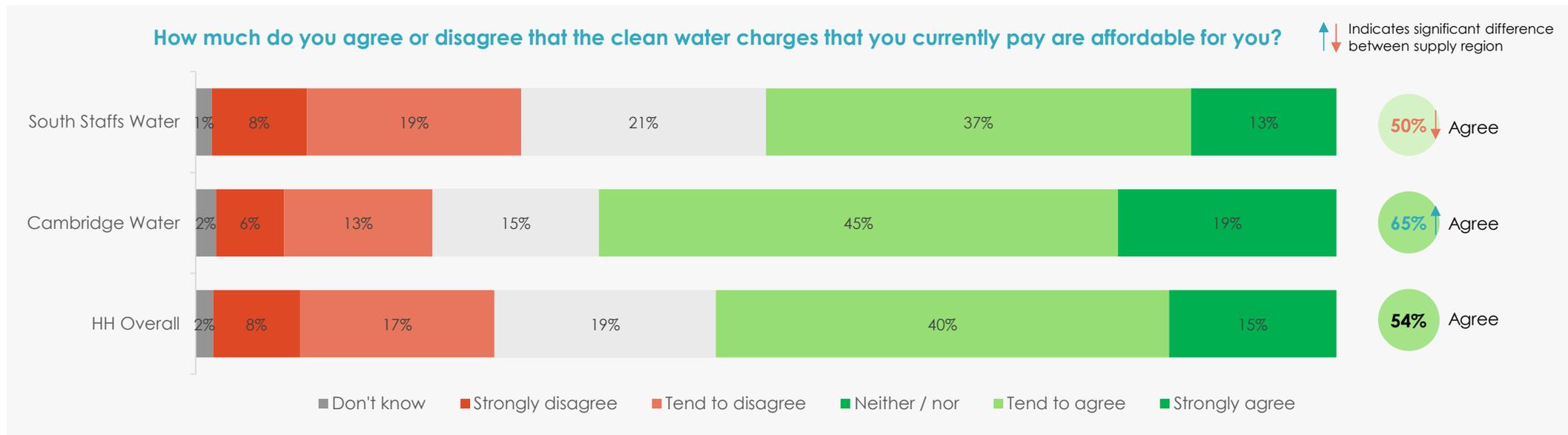
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**Current Bill  
Affordability.**

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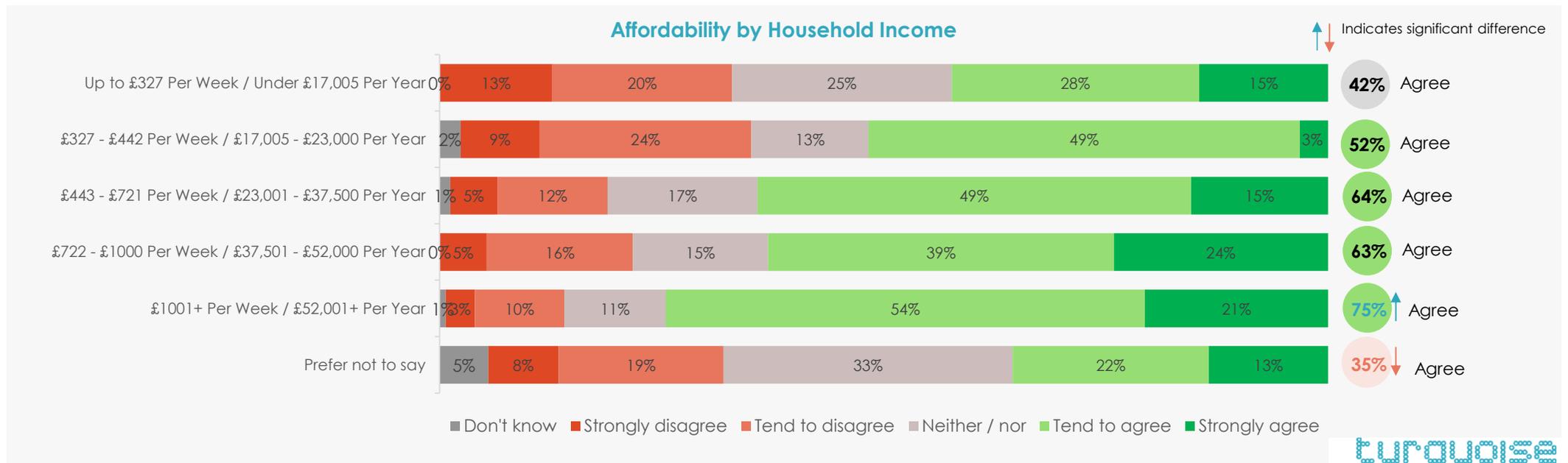
# Household Affordability.

- Having entered their total clean and wastewater bill, respondents were shown what their current annual clean water bill amount was. They were then asked to what extent they agree or disagree that their clean water charges are affordable for them.
- Overall, just 54% of household customers agree that their current bills are affordable, with a further 19% answering neither/nor. A quarter of household customers (25%) disagreed that their charges are affordable.
- There was a significant difference between the two supply regions, with Cambridge Water customers significantly more likely to agree that their charges are affordable compared with Cambridge Water customers (65% vs. 50%).
- Results from the SSC customer satisfaction tracker indicates that these affordability figures are significantly lower than expected. For comparison, affordability levels were 62% across 2020/21 and 71% across 2021/22 in this study (when looking at comparable online responses only). It's possible that showing the customers their actual bill beforehand had a negative impact on perceptions of affordability in this study.



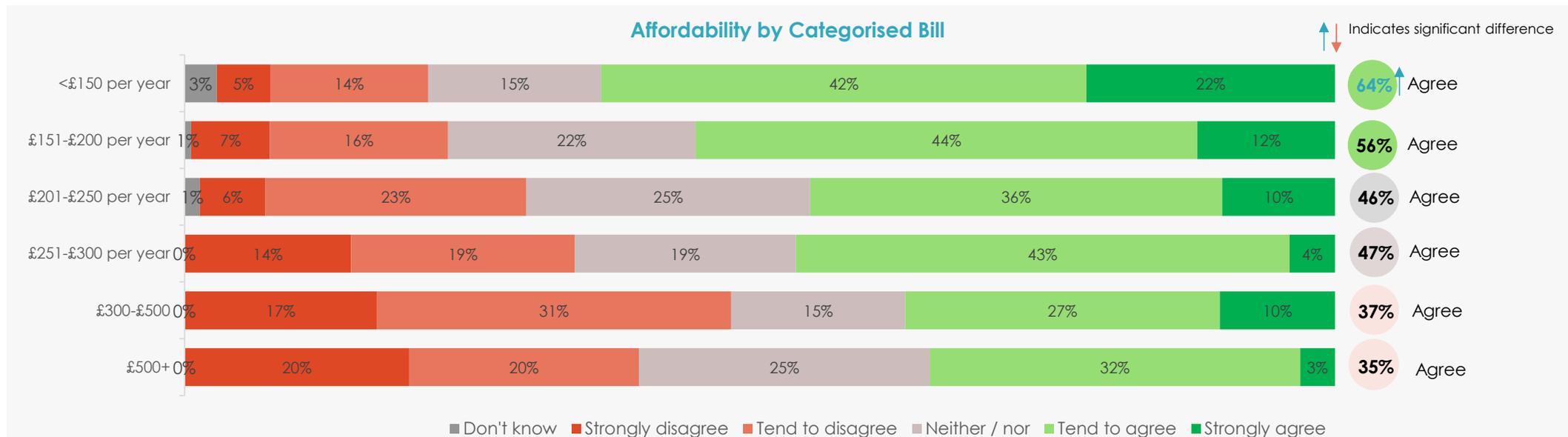
# Household Affordability by Household Income.

- Customers with higher annual household incomes were more likely to agree that their clean water bill was affordable. Customers in the highest income bracket of over £52,001 per year significantly so (75%).
- Customers who preferred not to divulge their annual household income were significantly less likely to agree that their bills are affordable (35%).
- Just 42% of customers with a household income of under £17,005 per year agreed that their clean water bills are affordable.
- Linked to these results, customers with lower social grades were less likely to agree that their water bills are affordable – DE significantly (40%).



# Household Affordability by Annual Bill.

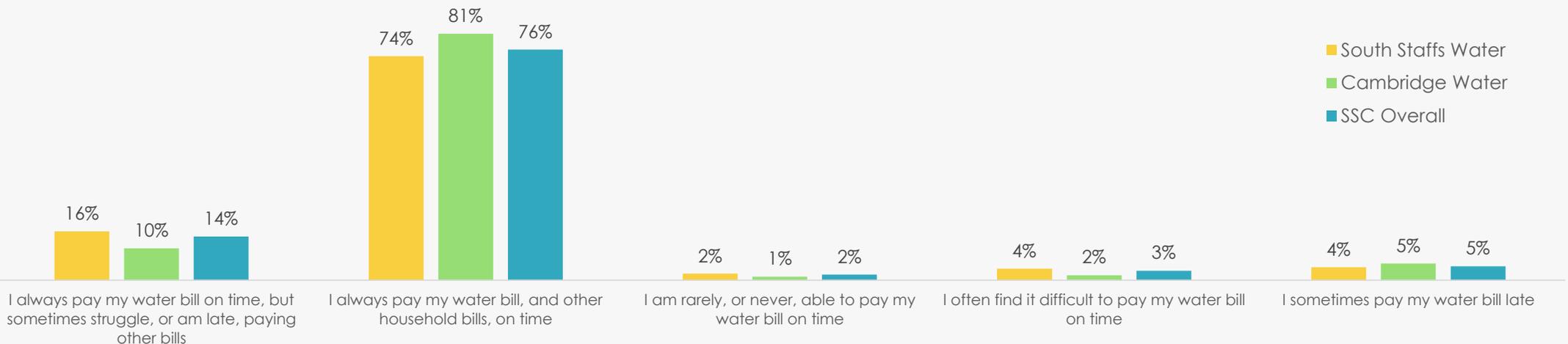
- Generally, the lower the customer's bill the more likely they are to agree that their bills are affordable.
- Customers with annual bills of less than £150 were significantly more likely to agree that their bills are affordable.



# Household Affordability – Water and Other Bills.

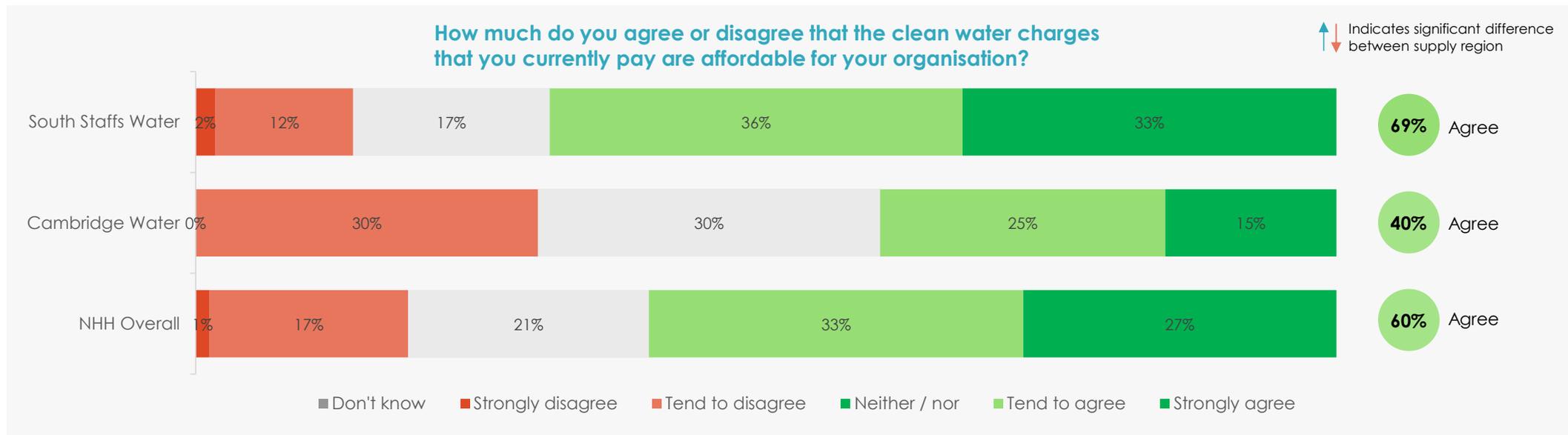
- Despite the low levels of affordability agreement with their current clean water bills, 76% of household customers pay their water, and other household bills, on time. A further 14% always pay their water bills on time but sometimes struggle, or are late, paying other bills.
- 5% of customers either rarely, or never, pat their water bill on time or often find it difficult to pay their water bill on time (6% South Staffs : 3% Cambridge)

Which of the following best describes how affordable you currently find your water bill and other household bills?



# Non-Household Affordability.

- The survey flow was the same for business customers. Having entered their total clean and wastewater bill, respondents were shown what their organisation's current annual clean water bill amount was. They were then asked to what extent they agree or disagree that their clean water charges are affordable for them.
- Overall, 60% of household customers agree that their current bills are affordable, with a further 21% answering neither/nor.
- There was a sizeable difference between the two supply regions, with South Staffs Water customers more likely to agree that their charges are affordable compared with Cambridge Water customers (69% vs. 40%). However, the difference is not statistically significant at the small sub-sample level.





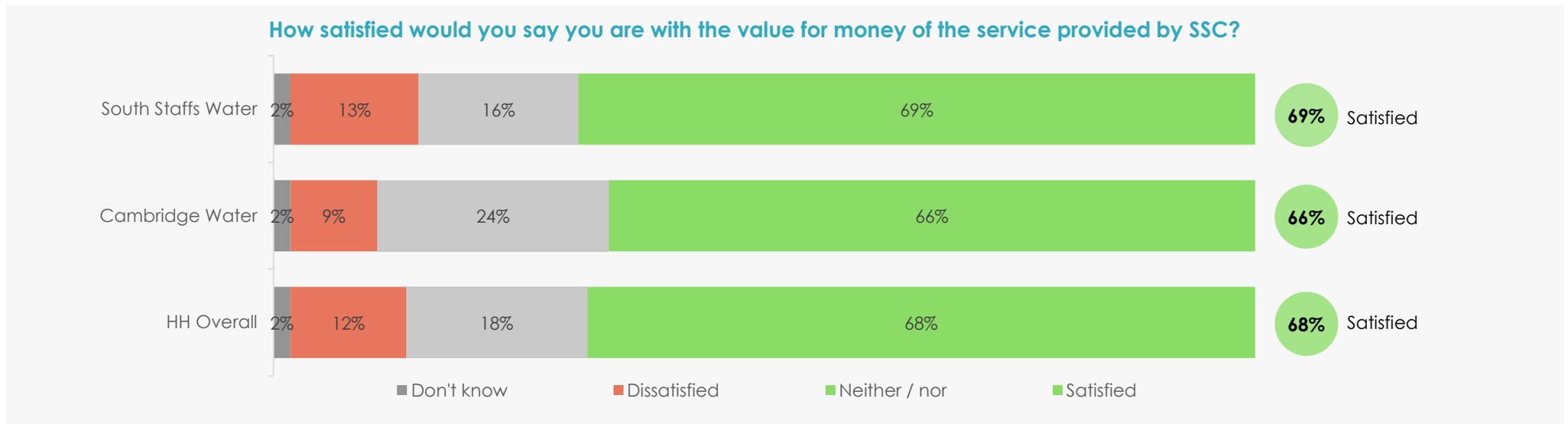
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Perceptions of SSC.



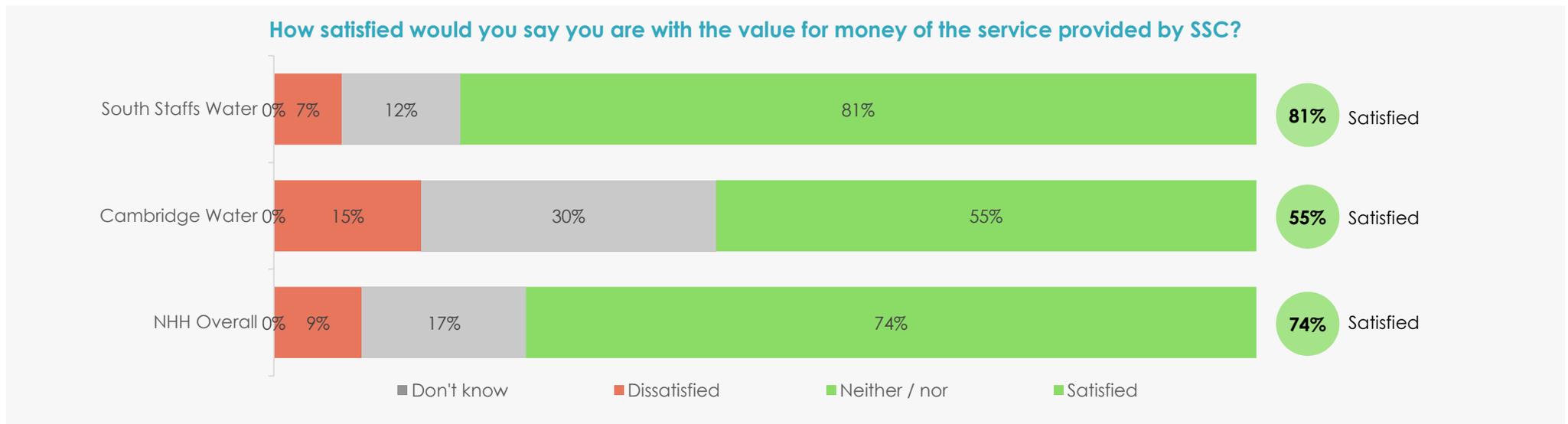
# Household Satisfaction with Value for Money.

- Overall household satisfaction with value for money for household customers was 68%. This result is more in line with the figures recorded in other SSC tracking surveys.
- South Staffs Water household customers were slightly more satisfied with value for money than Cambridge Water customers, although not significantly.
- Whilst there were no significant differences by key demographics, male customers (63%) and those with a DE social grade (62%) were less satisfied.



# Non-Household Satisfaction with Value for Money.

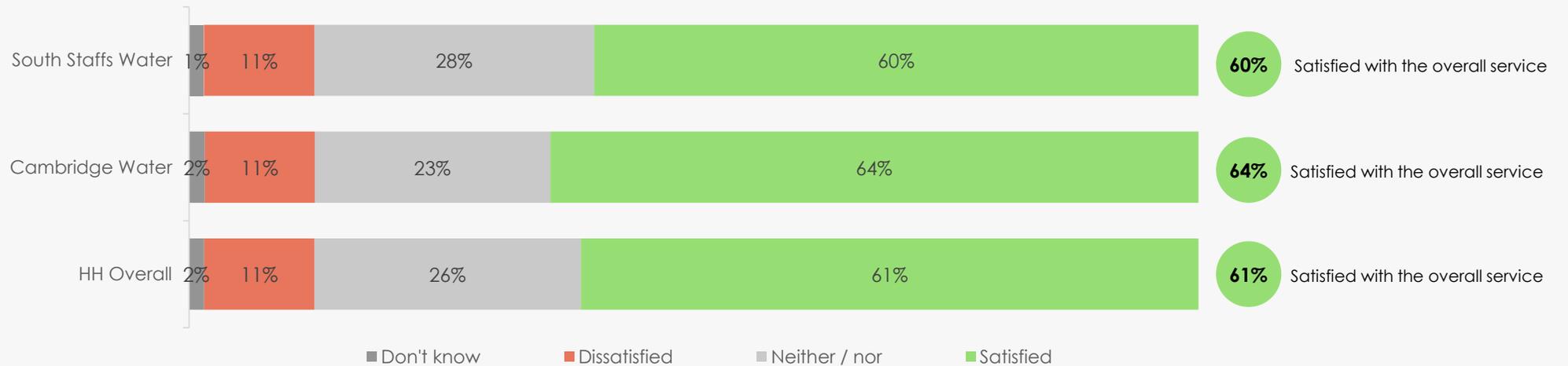
- Overall household satisfaction with value for money for non-household customers was 74%.
- As with affordability, South Staffs Water non-household customers were more satisfied with value for money than Cambridge Water customers, although not significantly given the small sub-sample.



# Household Satisfaction with Overall Service.

- Household satisfaction with overall service was 61% overall.
- Overall satisfaction was slightly higher in the Cambridge Water region (64%), however, not significantly.
- 11% of customers reported being dissatisfied with the overall service provided in both regions.
- The only significant difference by key demographics was for male customers, who are significantly more likely to be dissatisfied with overall service (15%).
- Once again, as seen previously with the affordability metric, the overall service satisfaction result is lower than expected. By way of comparison, satisfaction with overall service was 70% across the SSC region in the 2020/21 and 73% in 2021/22 in the customer promises tracker (online surveys only).

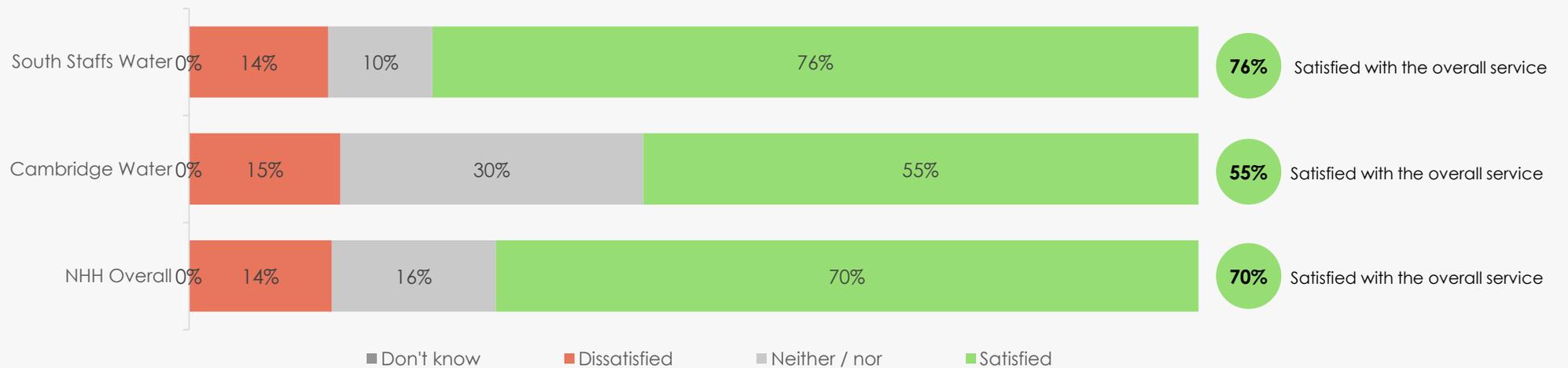
How satisfied would you say you are with the overall service provided by SSC?



# Non-Household Satisfaction with Overall Service.

- Non-household satisfaction with overall service was slightly higher than household satisfaction at 70% overall.
- Non-household satisfaction was slightly lower in the Cambridge Water region (55%) than in the South Staffs region (76%), however, not significantly.
- 14% of customers reported being dissatisfied with the overall service provided in both regions which is 3%p higher than the figure for household customers.

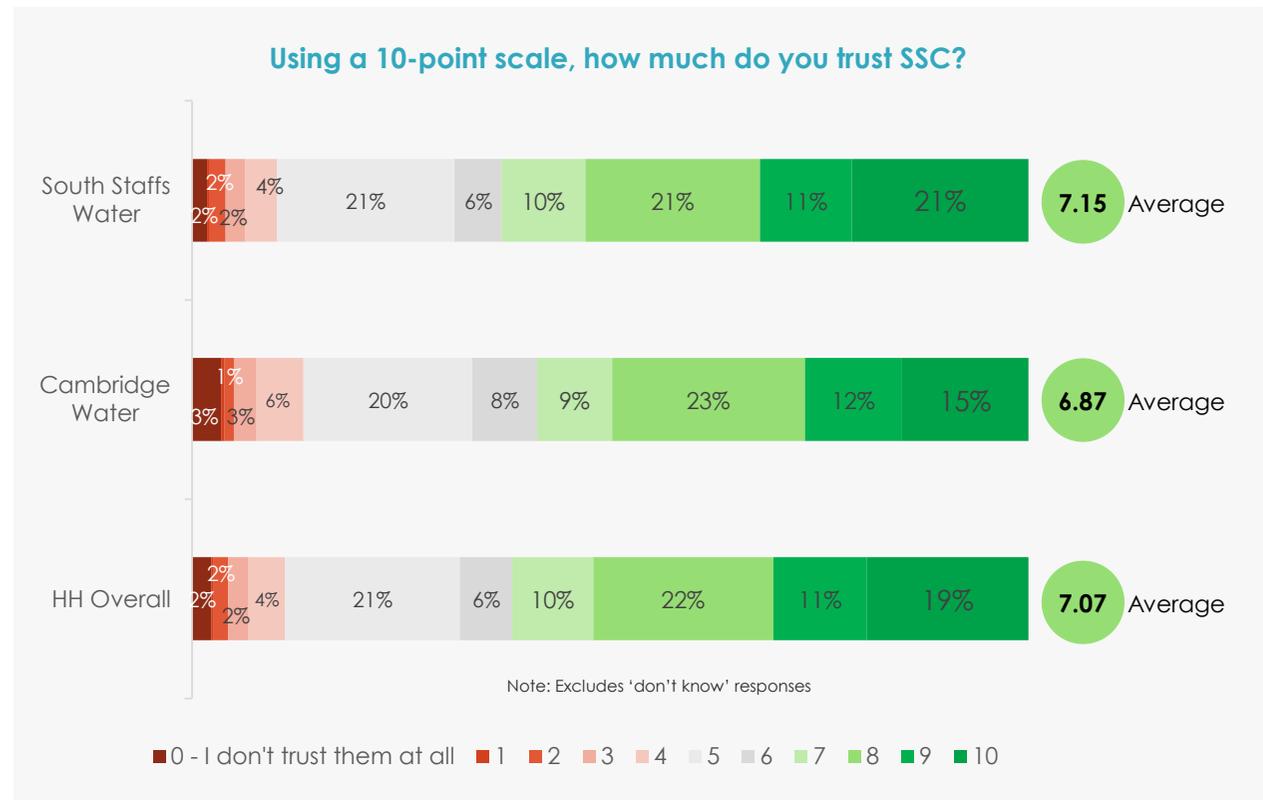
How satisfied would you say you are with the overall service provided by SSC?



# Household Trust.

## How much do you trust SSC?

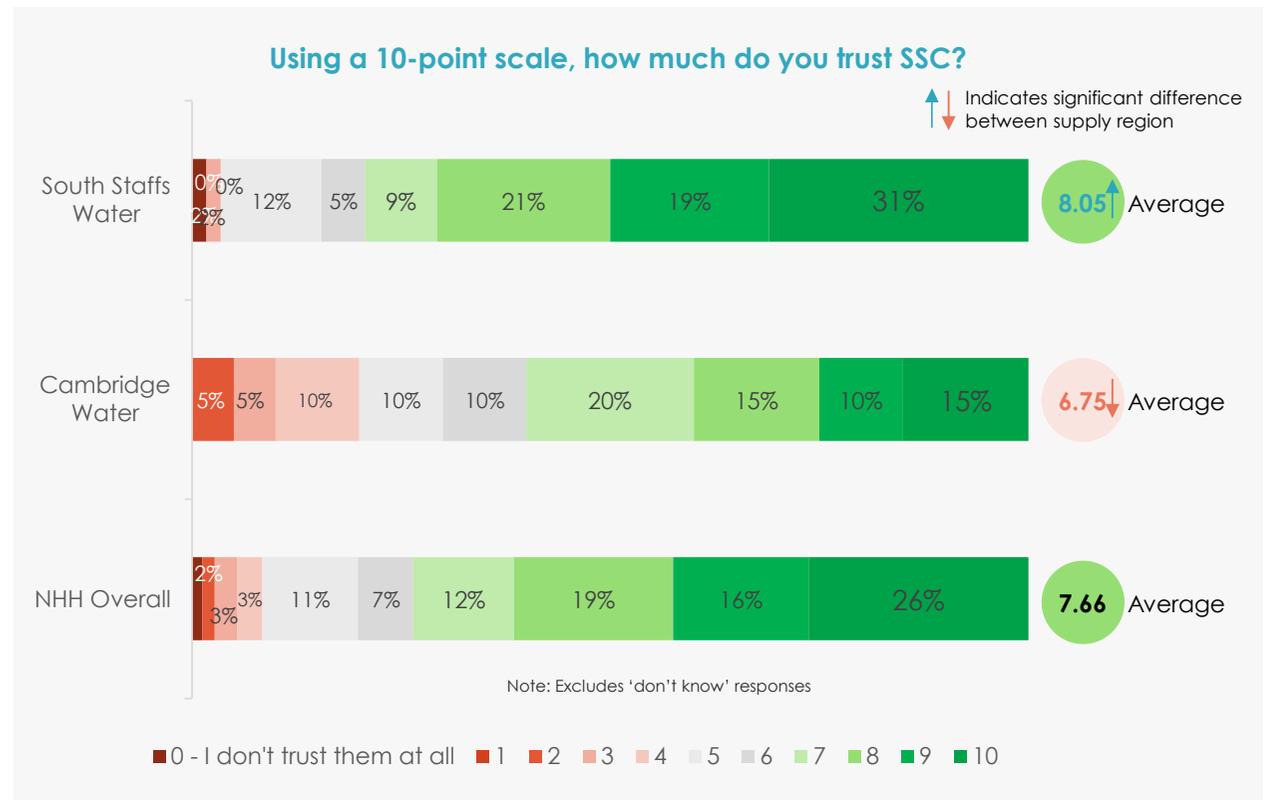
- Overall, trust scores are relatively high, however, significantly lower than in comparative studies for SSC.
- The majority (62%), across both regions scored between a 7 and 10 out of 10, therefore, would be considered as trusting SSC.
- Average trust scores were higher amongst South Staffs Water customers (7.15) than Cambridge Water customers (6.87), however, not significantly.
- Females gave, on average, significantly higher average trust score than males (7.40 vs 6.72).
- There were also significant differences by age, with older customers (75+) giving a significantly higher average scores (8.32) and customers aged 35-44 giving significantly lower average scores (6.53).



# Non-Household Trust.

## How much do you trust SSC?

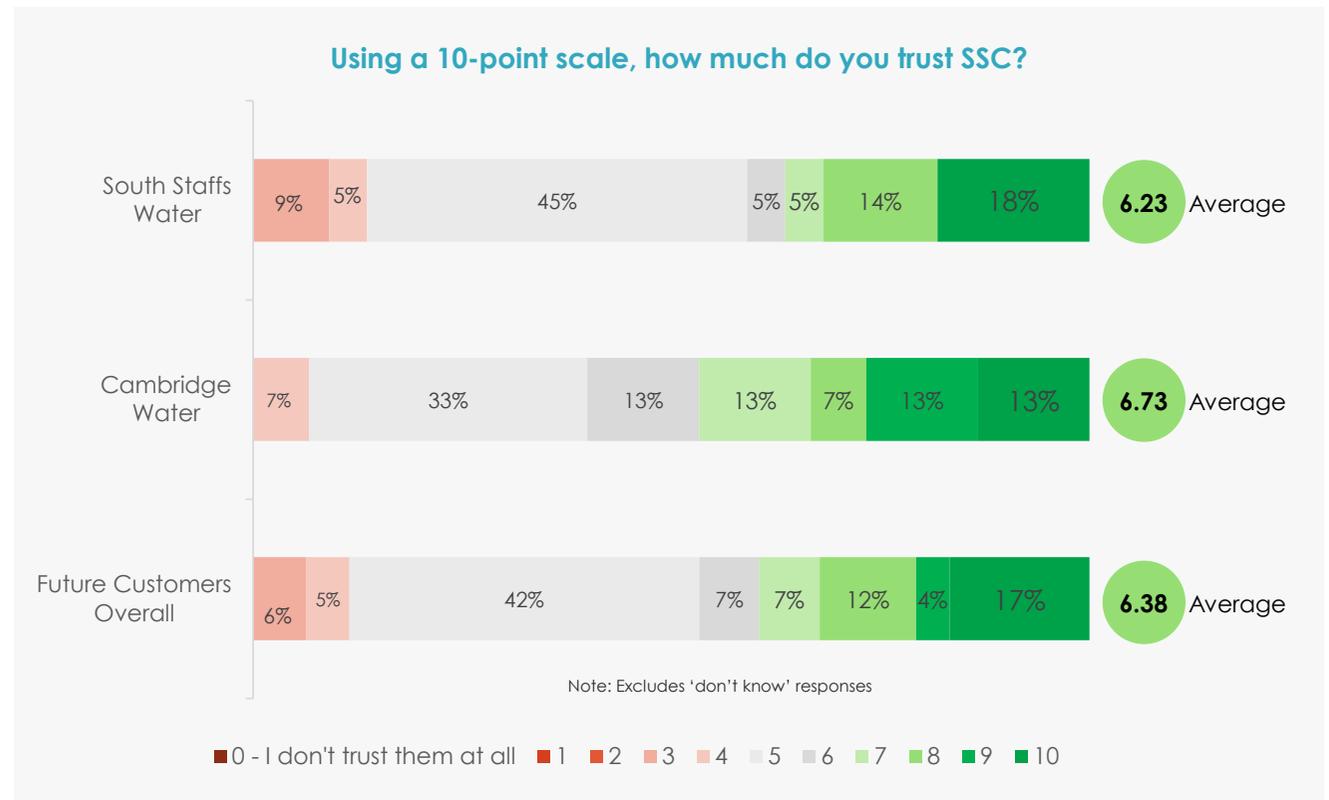
- Overall, trust scores amongst non-household customers were higher than amongst household customers.
- Across both regions, 74% of customers are considered to trust SSC (scored 7-10).
- However, non-household trust was significantly lower in the Cambridge Water region (6.75).



# Future Customer Trust.

## How much do you trust SSC?

- Overall, trust scores were lowest amongst future customers. However, it's perhaps understandable that almost half of these respondents gave middling scores of 5 or 6 and likely represents a lack of knowledge amongst this audience.
- 39% trust SSC and gave a score between 7 and 10.
- None of the future customers in the sample gave a score of 2 or below.





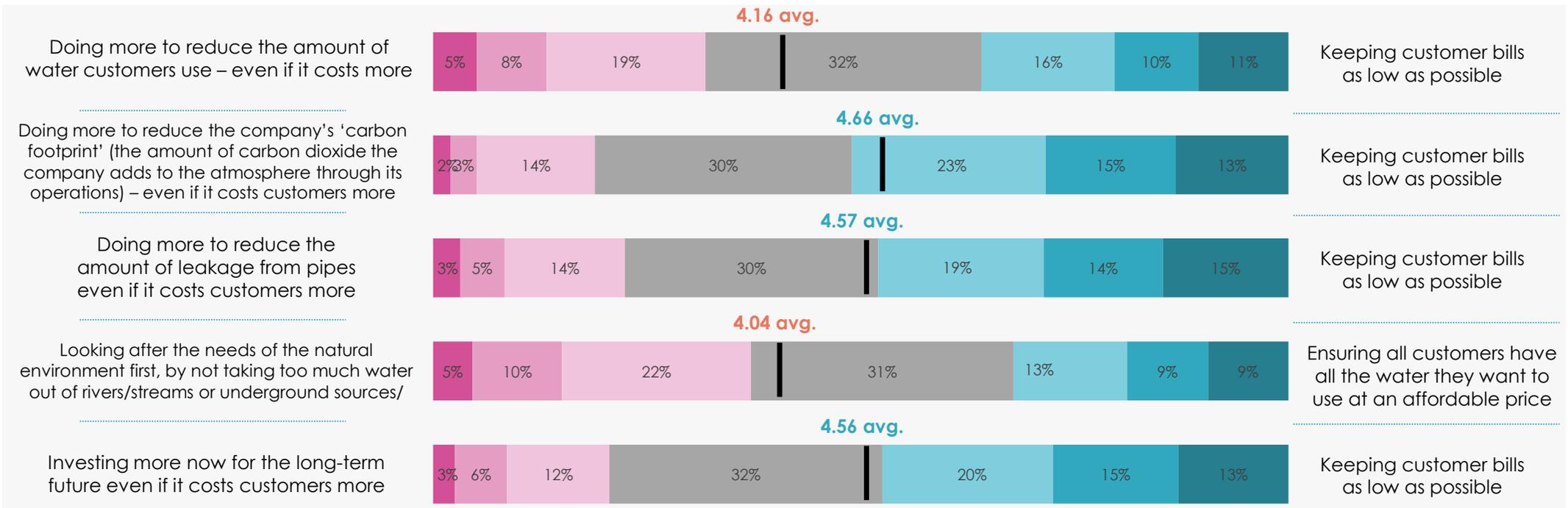
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**Attitudes Towards Key  
Plan Trade-Offs.**

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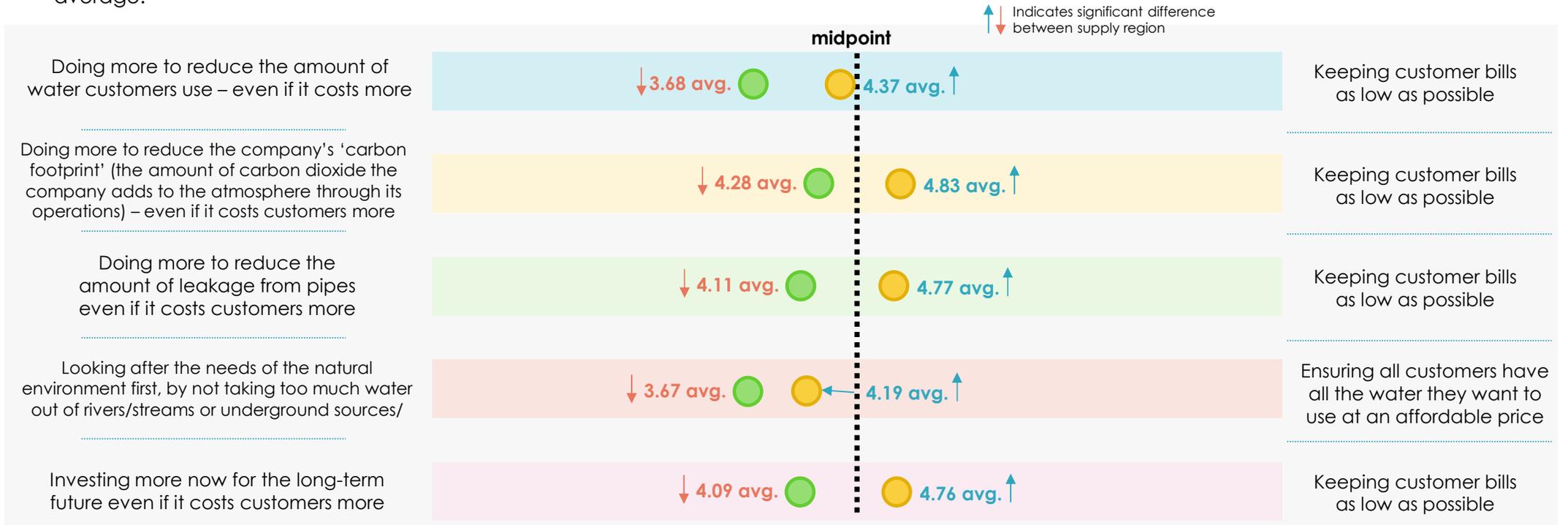
# Household Attitudes Towards Plan Trade-Offs.

- The chart below shows the overall SSC household views on the trade-offs, with the average score for each set of opposing statements shown. Note that, an average score between both statements would be 4.00.
- There is a slight preference across the household sample towards either the 'keeping customer bills as low as possible' or 'Ensuring all customers have all the water they want to use at an affordable price' across all five questions. This is most true against 'doing more to reduce the company's carbon footprint', 'doing more to reduce the amount of leakage' and 'investing now for the long-term future'.

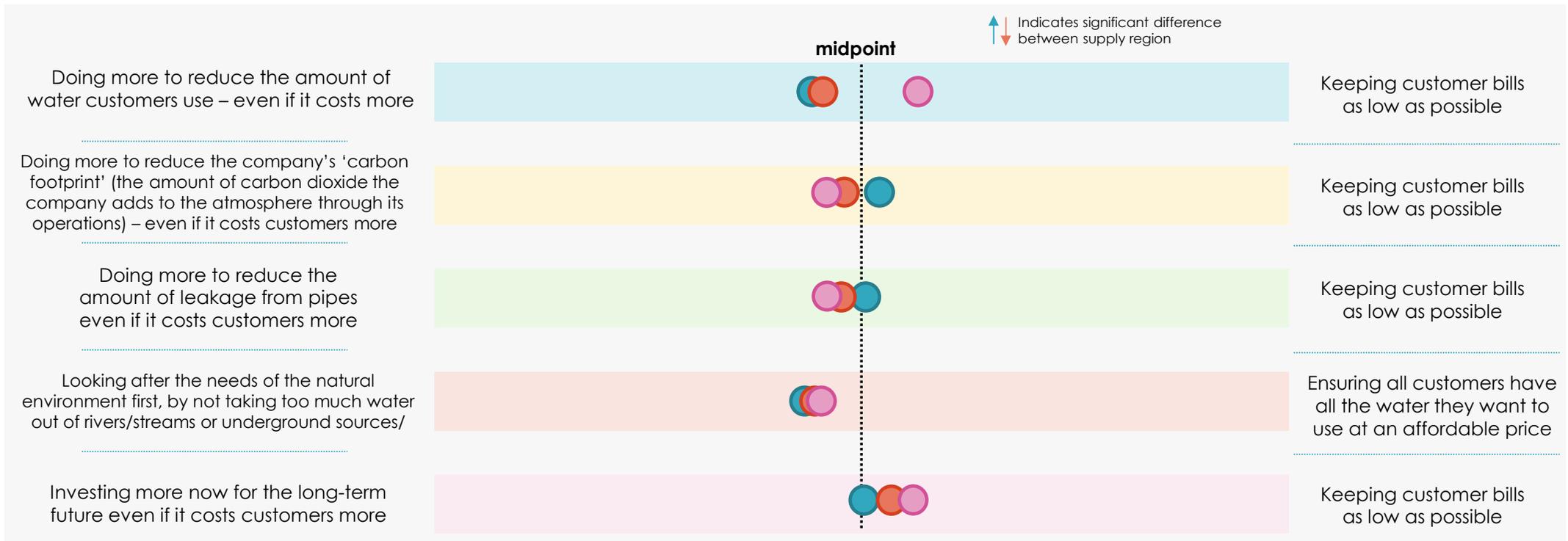


# Household Attitudes Towards Plan Trade-Offs by Region.

- There were significant differences in attitudes towards these trade-offs by region. South Staffs Water customers, on average, scored significantly higher (closer) to the affordability ('keeping customer bills as low as possible') end of the spectrum than Cambridge Water customers for all five set of statements.
- There was a similar trend by SEG, whereby, the lower the customer's SEG the closer towards the affordability end of the spectrum they scored on average.



# Household Attitudes Towards Plan Trade-Offs by Audience.



- Household Customers
- Non-Household Customers
- Future Customers



turquoise

**Uninformed  
Acceptability.**

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## Uninformed Acceptability.

- Before being shown a summary outline of the plan to garner 'uninformed views', all respondents were shown a short video explaining the reasons why SSC need to produce the plan, the challenges the region faces in the future and some background around the consultation to-date.
- Respondents were held on the page until they had viewed the video and spent a reasonable time (45 secs) reading the summary plan information to ensure, as far as possible, the most robust feedback.



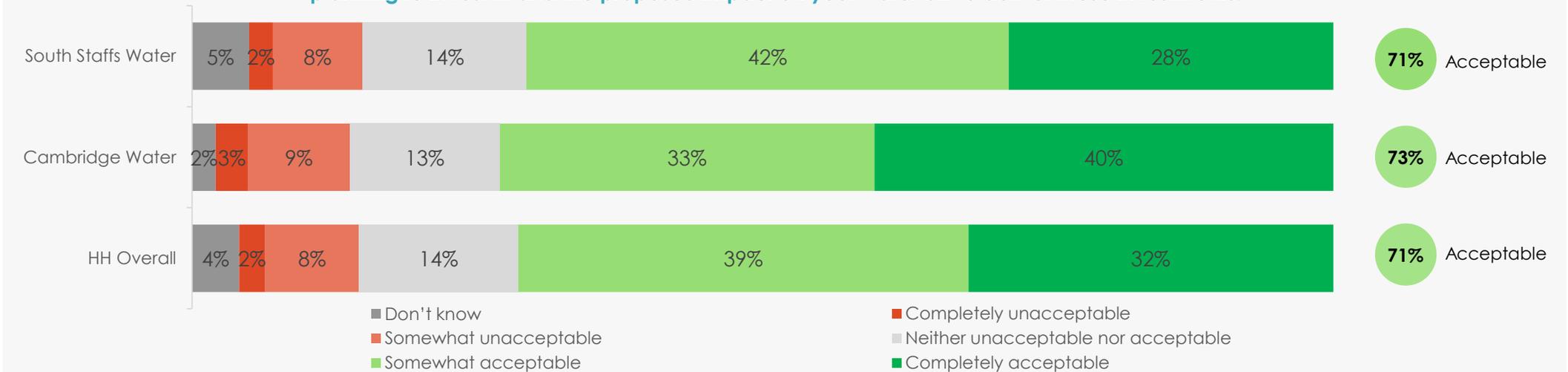
# Household Uninformed Acceptability.



- Positively, just over 7 out of 10 household customers (71%) believe the plan acceptable based on the uninformed stimulus.
- Acceptability was slightly higher in the Cambridge Water region (73%).
- Overall, 11% of household customers believed the plan was unacceptable at this stage (10% South Staffs; 12% Cambridge) – and a further 4% answered 'don't know'.
- Whilst there were no significant differences by key demographics, males tended to find the plan less acceptable (69%), as did older customers (67% amongst those aged 65+) and customers with a lower social grade (68% amongst those with a DE social grade).

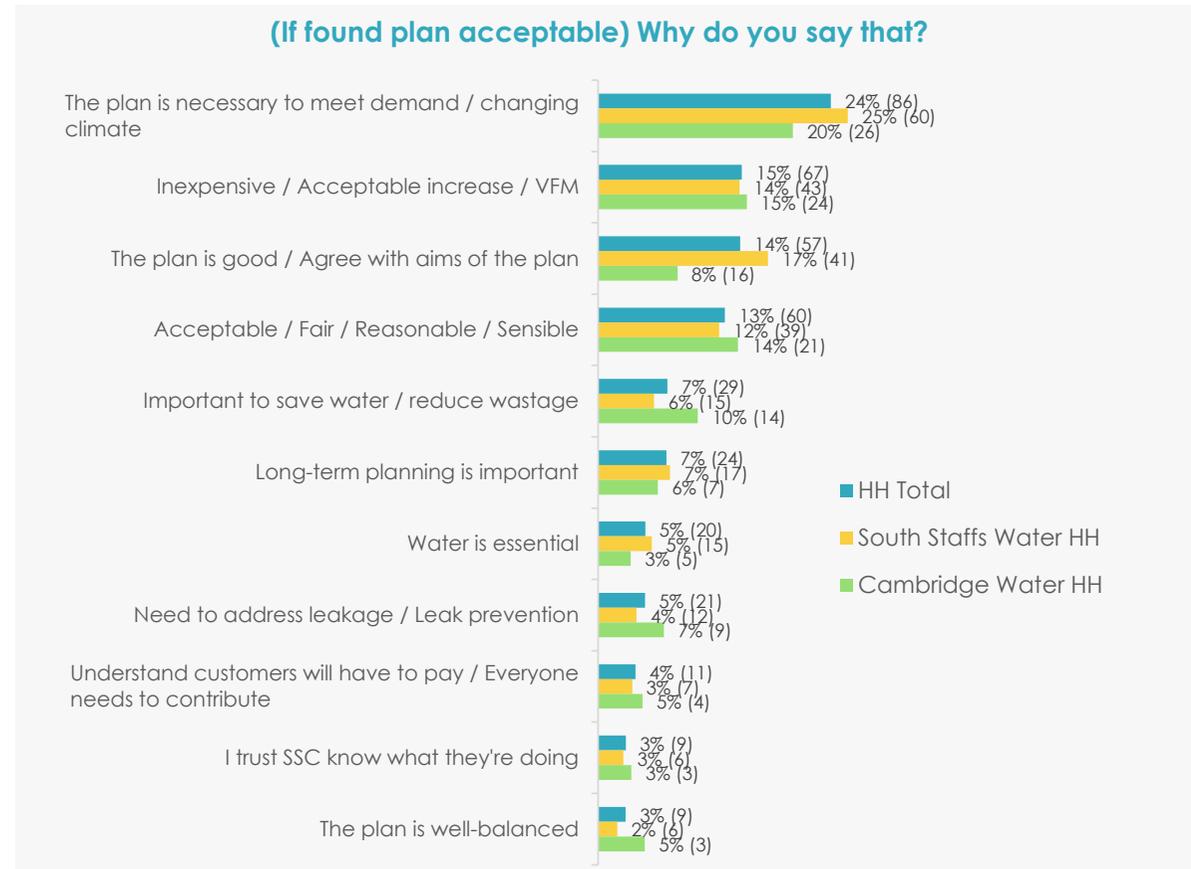
How acceptable is this plan for you? Please think about the options presented that SSC is planning to invest in and the proposed impact on your water bill to deliver these investments.

↑ ↓ Indicates significant difference between supply region



# Household Reasons for Finding the Plan Acceptable.

- The main spontaneous reasons given for finding the plan acceptable amongst household customers was that 'the plan is necessary to meet demand / changing climate' (24%) and that the plan is 'inexpensive / acceptable increase / value for money' (15%). Customers with an AB social grade were significantly more likely to cite that the rise in price was 'inexpensive' or 'acceptable' (28%)
- Further reasons were around agreement with the plan's aims and that it was acceptable, fair, reasonable and/or sensible.
- There were no significant difference in the reasons given by region or key demographics.
- Some selected comments can be seen on the following slide.



# Household Reasons for Finding the Plan Acceptable.

"You have explained very well the reasons for the increase and I support what you are trying to achieve. I didn't tick completely because at the moment finances are very tight as a single mum of five but I would be willing to support your plans and it's cert interesting to learn more about this. I've never really thought much about it."

- South Staffs HH Customer, Female, 35-44

"As we have seen this summer, drought is a real possibility so something that needs to be looked at urgently. There seem to be more people needing water so increasing supplies is sensible and £14 over a year is fine!"

South Staffs HH customer, Female, 25-34

"Because people need to use less water NOW! South Staffs water need to be encouraging us to use water more effectively and show that you are doing your bit to reduce wastage too. We need to work together on this. The additional cost suggested is reasonable, but I understand that for some, this might be difficult."

- South Staffs HH Customer, Female, 65+

"Clean drinking water is a mandatory requirement of a civilised nation. The cost when billed should accurately reflect the actual (unit cost) amount used. Take my example as a house with just two retirees. Perhaps we should be given some incentive (proof of savings) to move to metered supply."

- South Staffs Water HH Customer, Male, 65+

"Clean, safe water is as essential as energy to households. But degrading the environment is unacceptable and bills must reflect this. Huge energy cost increases put into perspective how essential services can be affected by external factors. Relative to energy, water supply is low cost. Increasing supply security while maintaining the environment responsibly and indefinitely can only help make customers realise how important the resource is and the cost increases can encourage customers to reduce their own use."

- Cambridge Water HH customer, Male, 55-64

"£13.90 per year is nothing compared to the importance of this work. However, if the company is paying dividends, the funding must come from those first. You cannot justify paying dividends instead of doing improvement work and simply pass the cost to the customer to get away with it."

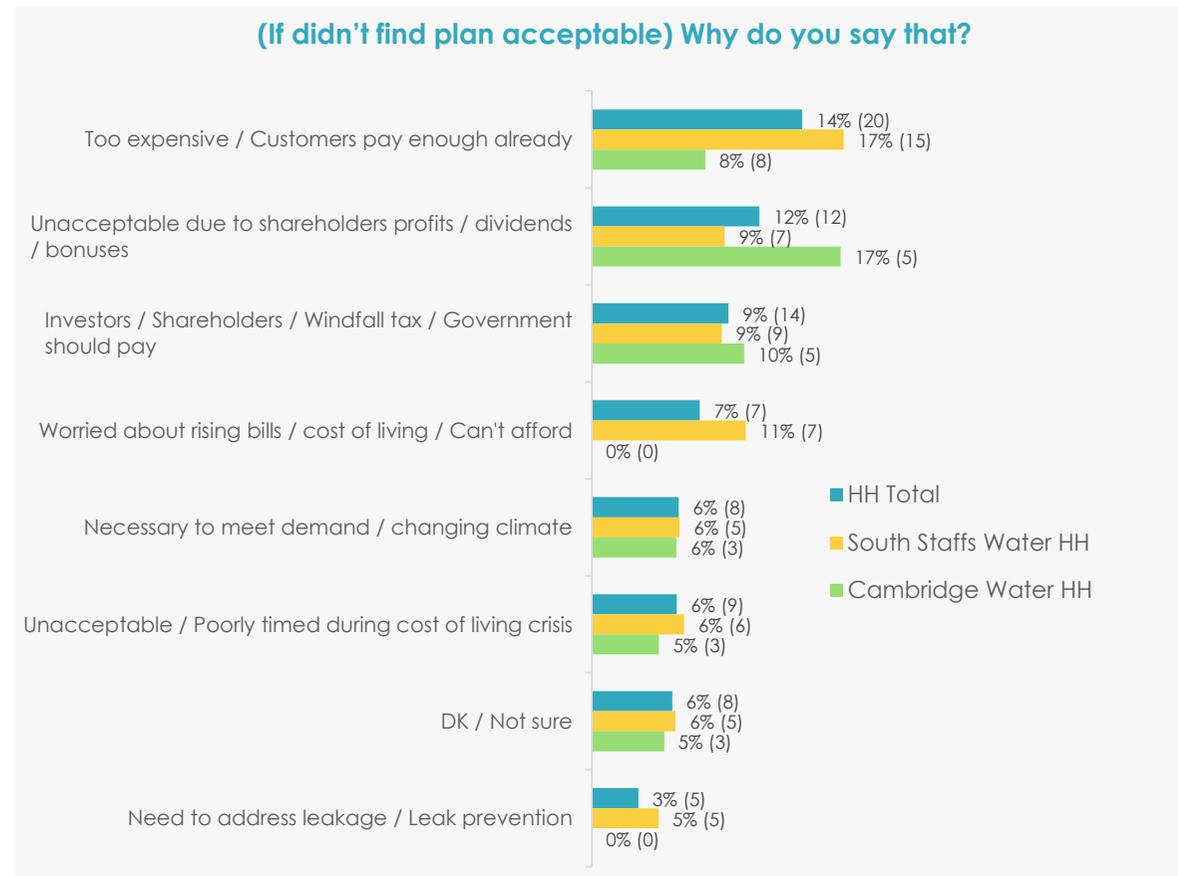
Cambridge Water customer, Male, 25-34

"I think it is acceptable to do so for the wider benefit of the area and the future of our water usage, however I can see the concern that may follow from raising customer bills. We are in cost of living crisis but at the end of the day we need to be respectful of the planet and where we live."

Cambridge Water customer, Female, 25-34

# Household Reasons for Not Finding the Plan Acceptable.

- Household reasons for not finding the plan acceptable were mainly around cost rather than issues with the plan detail in itself.
- Some customers feel that they pay enough already and so the rise to pay for the bill is too expensive (14%), whilst others are worried about rising bills and the cost of living (7%).
- Other issues with the cost were that they feel that it's unacceptable to put customer bills up to pay for the plan given perceptions around shareholder profits (12%).
- There was also a feeling that shareholders, investor, or even government intervention should pay for the plan before cost is passed on to customers (14%).



## Household Reasons for Not Finding the Plan Acceptable.

"Bills need to be as low as possible as water is essential for our survival, if reservoirs need to be altered the money should come from government. HS2 is not essential but water is, the government need to prioritise where money should be spent, the average person in our country are struggling to pay for gas, electric and food at present , any increase in bills will be devastating for the majority of your customers."

South Staffs Water HH Customer, Male, 55-64

"You have failed to invest in new infrastructure for years preferring to pay huge salaries to executives and ignoring the fact that it was plainly obvious that new reservoirs were needed and leakage was ignored. Now you need a plan and expect your customers to pay for it - the improvements should be paid for from your profits.

There is no competition in the water industry , rather you operate a local monopoly or cartel constantly fleecing your customers to pay for a ' better service ' .

The .solution is to return water companies [and other utilities to public ownership as soon as possible .

When a supermarket builds a new store they don't ask their customers to pay for it by adding £14.00 a year to their grocery bill !."

- South Staffs HH Customer, Male, 55-64

"This is unfair to ask for the money from the current residents when the demand is actually driven by the new developments. It is the new developments who are putting the pressure on the resources, they should fund this project not the current residents. The current residents are already hammered by the cost of living, inflation and high mortgage/rent. We are barely making the ends meet while the developers are getting richer and richer. The developers are draining the city of its resources, including water. You should divide the cost of this project between any new development approved inside the boundaries the project aims to serves. The developers are driving the demand, they should pay for it."

- Cambridge Water HH Customer, Female, 35-44

"The money should come from the top, big bosses being paid millions and getting super bonuses while the average person is struggling to feed their families already."

- South Staffs Water HH Customer, Female, 45-54

"Paying a little more each year towards ultimate sustainability and improvements is fine. However, the rate of additional cost and how accepting I/we are of it entirely depends on the parallel effects on profit margins and shareholder dividends. The vast vast majority (if not, honestly, all) of this extra funding should be coming from profits, windfall "taxes" on the company's profits, and a reduction in shareholder dividends so more money is available to reinvest. Without these figures and this information it is impossible to trust the plans, or to trust Cambridge Water as a company."

Cambridge Water customer, Male, 25-34

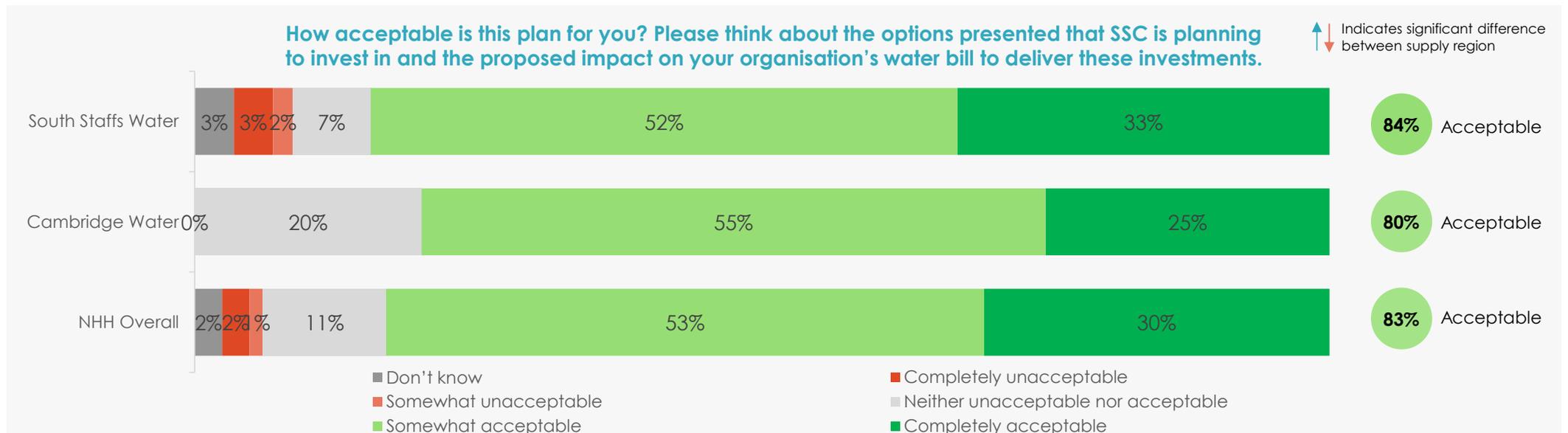
"A 50% reduction in leakage by 2050 is unacceptable - there should be a commitment to eliminate leakage other than in exceptional circumstances, enacted immediately. In addition, this should be at no cost to costumers, so have long paid for this service to be provided: this saving would more than cover all of the domestic savings that customers are otherwise to be coerced into."

Cambridge Water HH customer, Male, 35-44

# Non-Household Uninformed Acceptability.



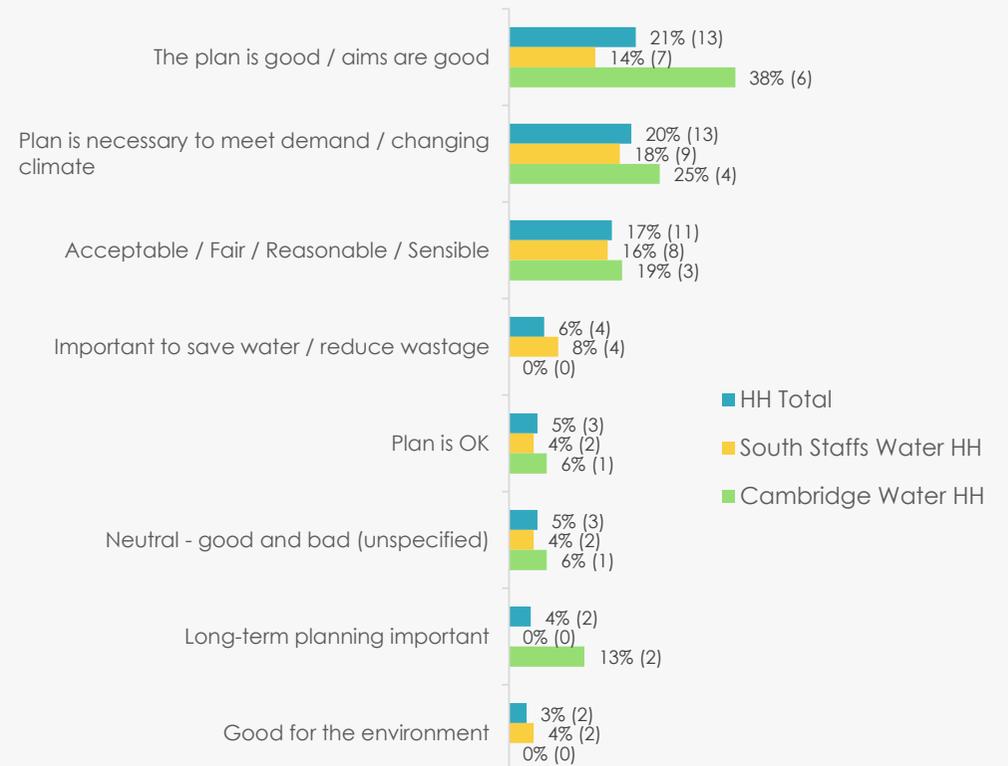
- Non-household customers found the plan more acceptable than household customers based on the uninformed stimulus – 83% overall.
- Again, there was little difference between the regions, however, South Staffs Water non-household customers did report a slightly higher acceptability % than Cambridge Water non-household customers (84% vs. 80%).
- Whilst not significant at the sub-sample level, micro businesses did score lower (68%) than small, medium and larger businesses. This is something to bear in mind given the discrepancies between the achieved sample profile with regards to business size and the actual profile in the region – albeit these results are based on very small sub-sample sizes (e.g. 19 micro businesses).



# Non-Household Reasons for Finding the Plan Acceptable

- The most common reasons given by non-household customers for finding the plan acceptable was that the plan was good and/or the aims of the plan were good. Like household customers, non-household customers also feel the plan is necessary to meet demand and changing climate.

(If found plan acceptable) Why do you say that?



# Non-Household Reasons for Not Finding the Plan Acceptable

- Due to the small number of non-household customers who didn't find the plan acceptable, below is a selection of the verbatim comments.

"Because I don't agree with everything said."  
- Cambridge Water NHH customer, Micro business, manufacturing.

"Seems a big hike in price it I suppose that's normal nowadays."  
South Staffs Water NHH Customer, Micro Business, Construction

"I feel it should be happening sooner."  
- Cambridge Water NHH customer, Small business, Health

"Reducing water loss and wastage is the main priority."  
South Staffs Water NHH Customer, Small Business, Retail

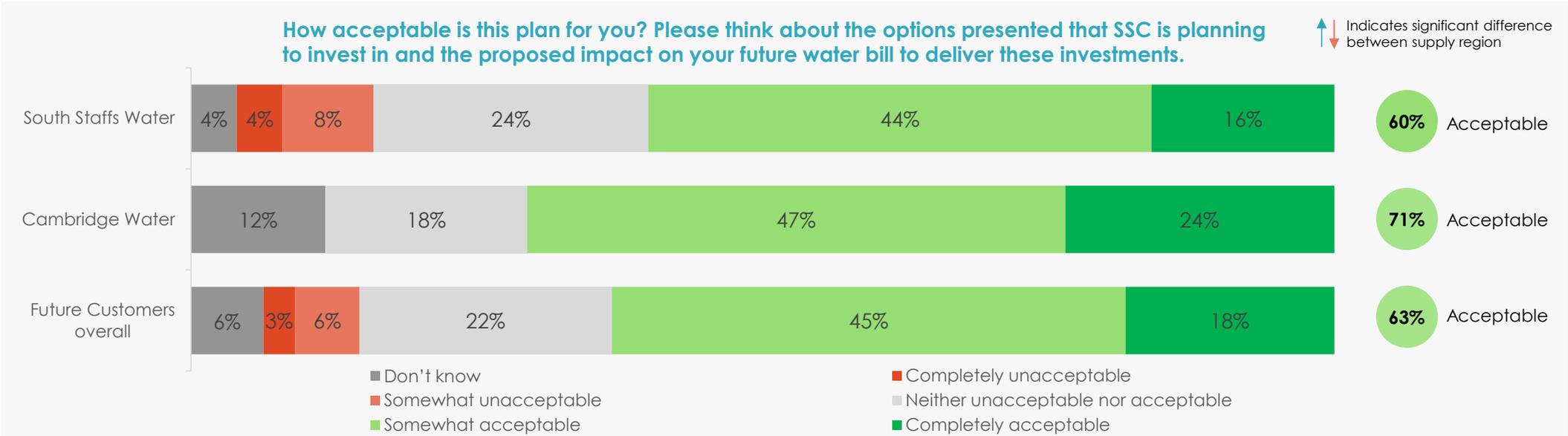
"You can't always believe what these companies say they change their prices all the time."  
- Cambridge Water NHH customer, Medium business, Property

"Can't afford these rise in bills."  
South Staffs Water NHH Customer, Micros Business, Business and Administration

# Future Customer Uninformed Acceptability.

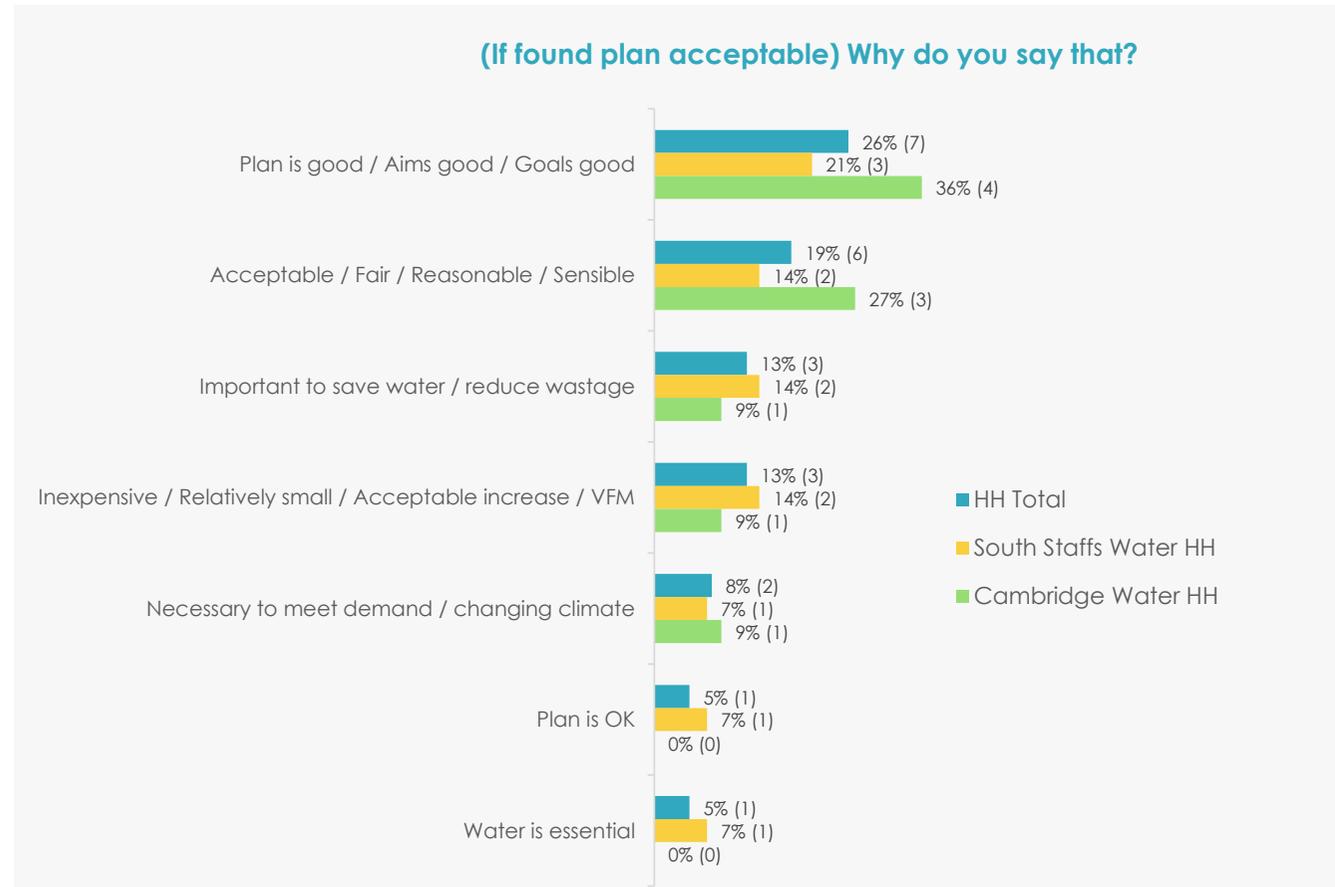


- Future customers found the plan least acceptable based on the uninformed stimulus – 63% overall.
- There was no significant difference between the regions, however, Cambridge Water future customers did report a slightly higher acceptability % than South Staffs Water future customers (71% vs. 60%).



# Future Customer Reasons for Finding the Plan Acceptable.

- The main reasons future customers found the plan acceptable were also due to feeling that the plan and its aims were good, fair, reasonable and/or sensible.
- Future customers also cited the importance of saving water (13%) and that the rise in bills was relatively small and/or acceptable (13%).



# Future Customer Reasons for Finding the Plan Acceptable

- Due to the small number of non-household customers who didn't find the plan acceptable, below is a selection of the verbatim comments.

"I agree with why they are planning to do and see how they are trying to maintain a healthy balance between their customers and the environment."  
- Cambridge Water Future Customer

"There are a lot of different steps planning to be taken for a really affordable price, it's barely even noticeable."  
South Staffs Water Future Customer

"They are looking after the environment while also taking into consideration the customer which are both important"  
- Cambridge Water Future Customer

"Running out of water is a big issue that has only gotten bigger due to climate change. Then fixing leaks and other issues with the transportation and collection of water will reduce the amount of water that each person wastes and allows for there to be an extra supply of water."  
South Staffs Water Future Customer

"It's only an extra 15 quid a year! People spend that on takeaways!!"  
- Cambridge Water Future Customer

"South staffs are using different methods to reduce the water wastage and also finding new sources."  
South Staffs Water Future Customer



turquoise

**Informed  
Acceptability.**

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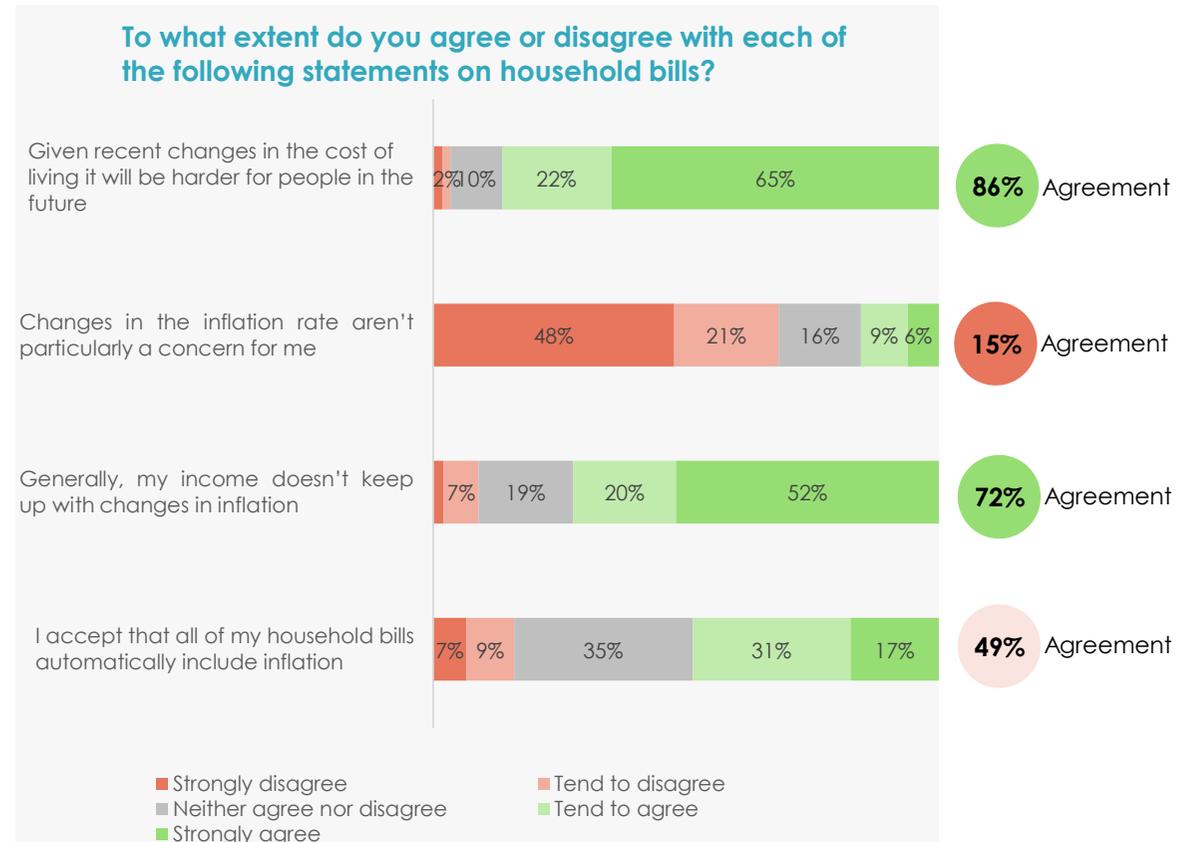
## Informed Acceptability.

- At this point, the concept of inflation and its impact on their bills was introduced to ensure respondents were as knowledgeable as possible.
- Before seeing the informed plan stimulus, an estimation of their future bill (in 2025) was shown to them – based on their current bill, inflation forecasts and the cost of the plan.
- Respondents were shown a further short video before introducing the informed plan stimulus.
- Respondents were, again, held on the page until they had viewed the video and spent a reasonable time (60 secs) reading the informed plan stimulus to ensure, as far as possible, the most robust feedback.



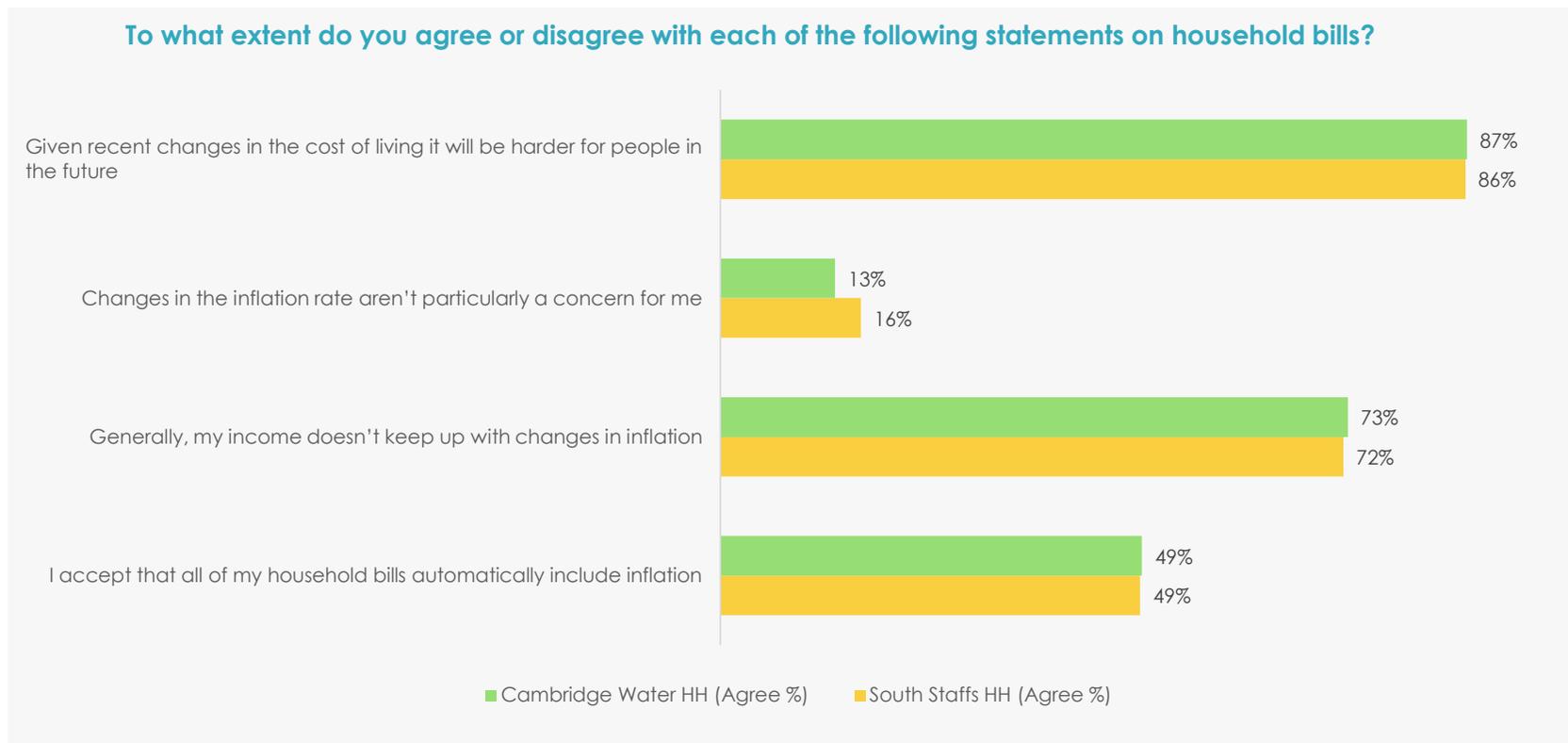
# Household Views on Bills and Inflation.

- Household responses to these agreement statements on household bills suggest there is considerable concern around recent changes to the cost of living.
- The majority of household customers (86%) agreed that given the recent changes in the cost of living it will be harder for people in the future, and just 15% agree that changes in the inflation rate aren't a particular concern (68% disagreed).
- Furthermore, just 9% of household customers disagreed that their income doesn't keep up with changes in inflation (72% agreed).
- Just under half (49%) of household customers accept that their household bills automatically include inflation, however, a further 35% answered neither/nor.



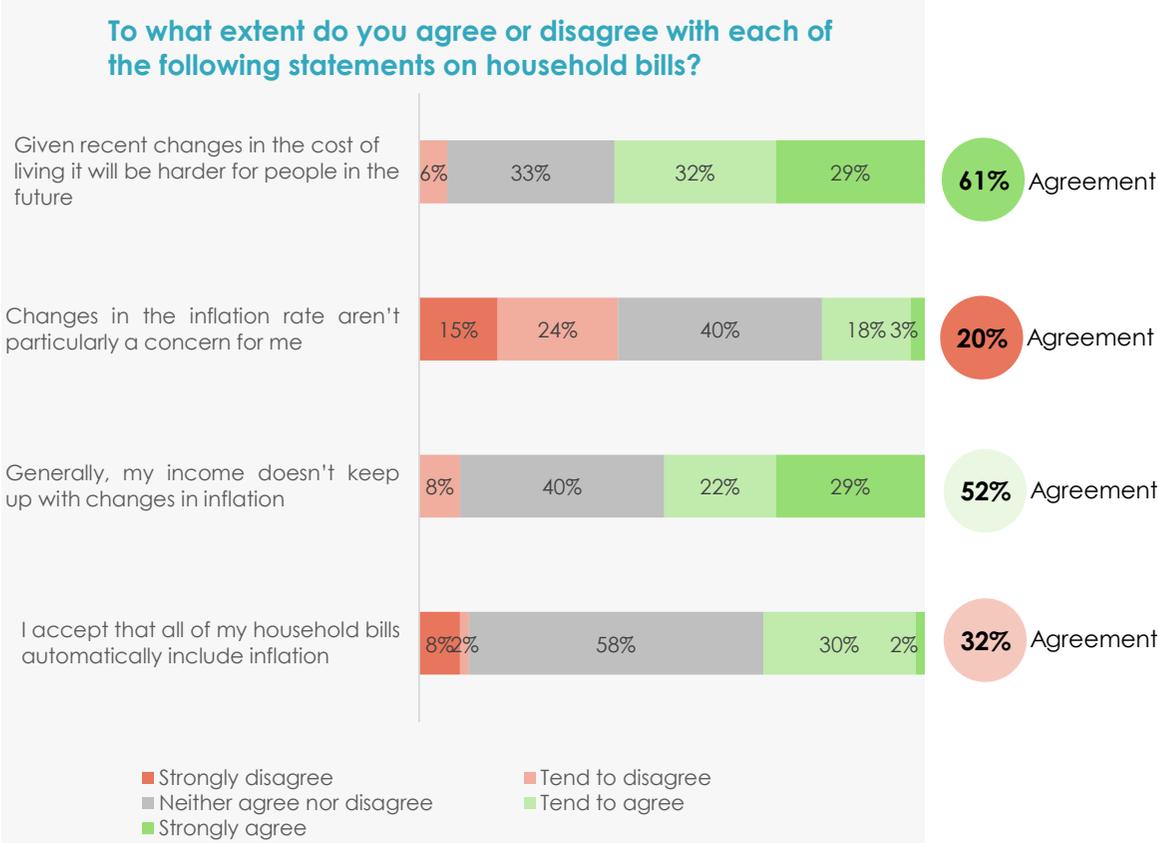
# Household Views on Bills and Inflation by Region.

- Views were almost identical across both supply regions.



# Future Customer Views on Bills and Inflation.

- Future customers were, on the whole, less concerned than household customers. However, a higher proportion of this audience did answer 'neither/nor' for each statement suggesting a potential lack of knowledge.
- Despite this, just 20% agreed that changes in the inflation rate aren't a concern for them.



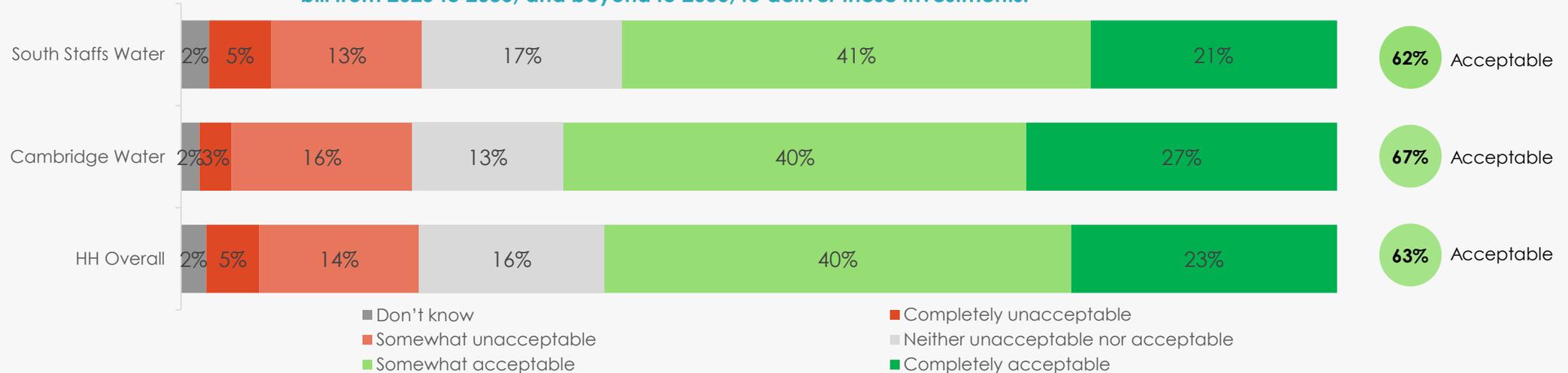
# Household Informed Acceptability.



- Overall, 63% of household customers found the plan acceptable, having seen it in more detail. This is 8%p lower than the uninformed acceptability score of 71%.
- South Staffs Water customers, as with uninformed acceptability, scored slightly lower than Cambridge Water customers (67% Cambridge: 62% South Staffs)
- Household customers with an AB social grade were significantly more likely to score the plan acceptable based on the informed stimulus (76%), as were customers in the highest household income bracket of £52,001+ per year (79%). On the other hand, customers with a DE social grade were significantly less likely to find the plan acceptable (52%).
- Female household customers were significantly more likely to deem the informed plan acceptable than male customers (70% vs. 56%).

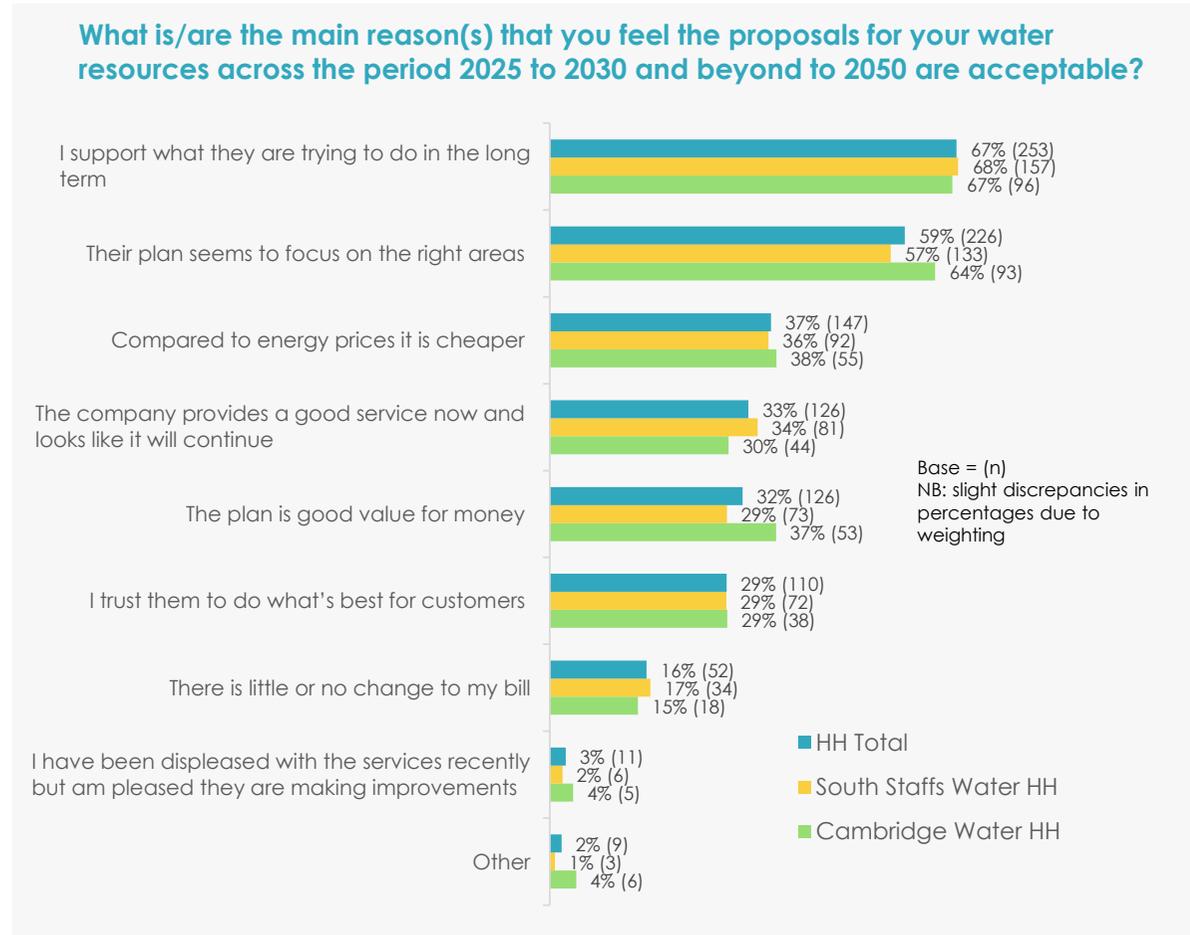
Having seen the plan in more detail, how acceptable is this plan for you? Please think about the options presented that SSC is planning to invest in and the proposed impact on your water bill from 2025 to 2030, and beyond to 2050, to deliver these investments.

↑ ↓ Indicates significant difference between supply region



# Household Main Reasons for Finding the Plan Acceptable.

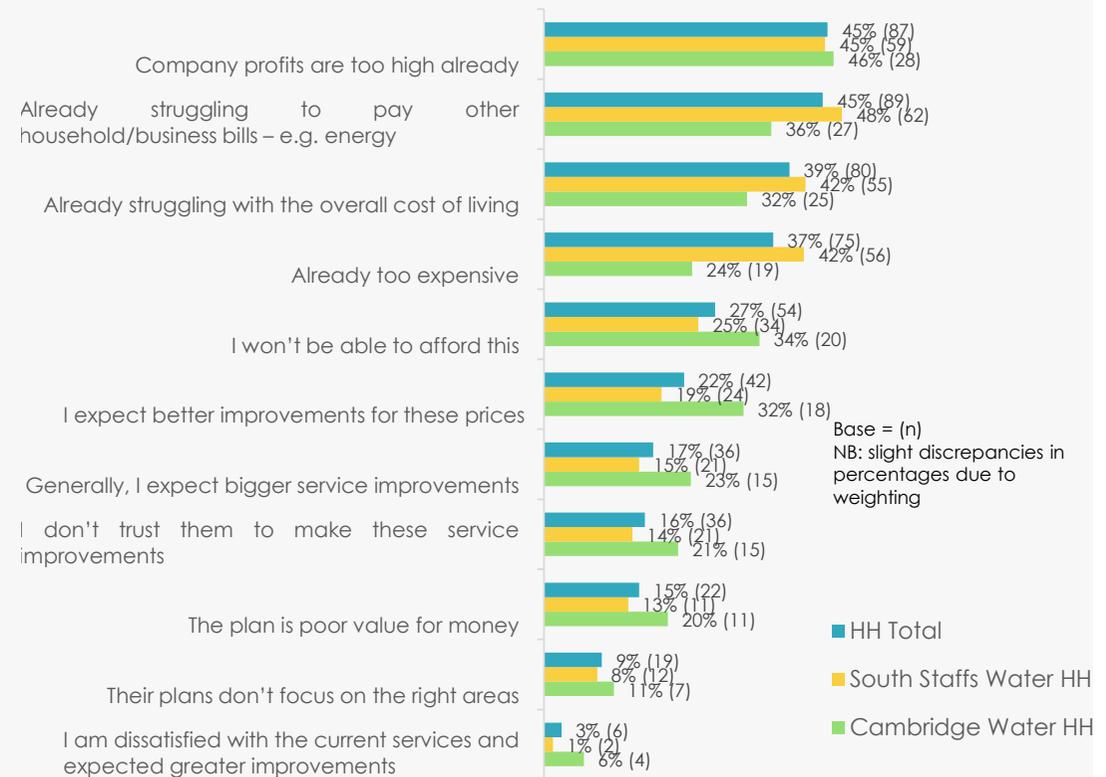
- The key reason selected for finding the plan acceptable was that customers 'support what they (SSC) are trying to do in the long term' (67%).
- The secondary reason was that the 'plan seems to focus on the right areas' (59%).
- Both of the above were the only reasons selected by more than 50% of customers who found the plan acceptable.
- Reasons given were very similar across the two supply regions.
- Male customers who found the plan acceptable were significantly more likely to cite 'the plan is good value for money' (41%) than female customers (25%).
- There were no other significant differences by demographic.



# Household Reasons for Not Finding the Plan Acceptable

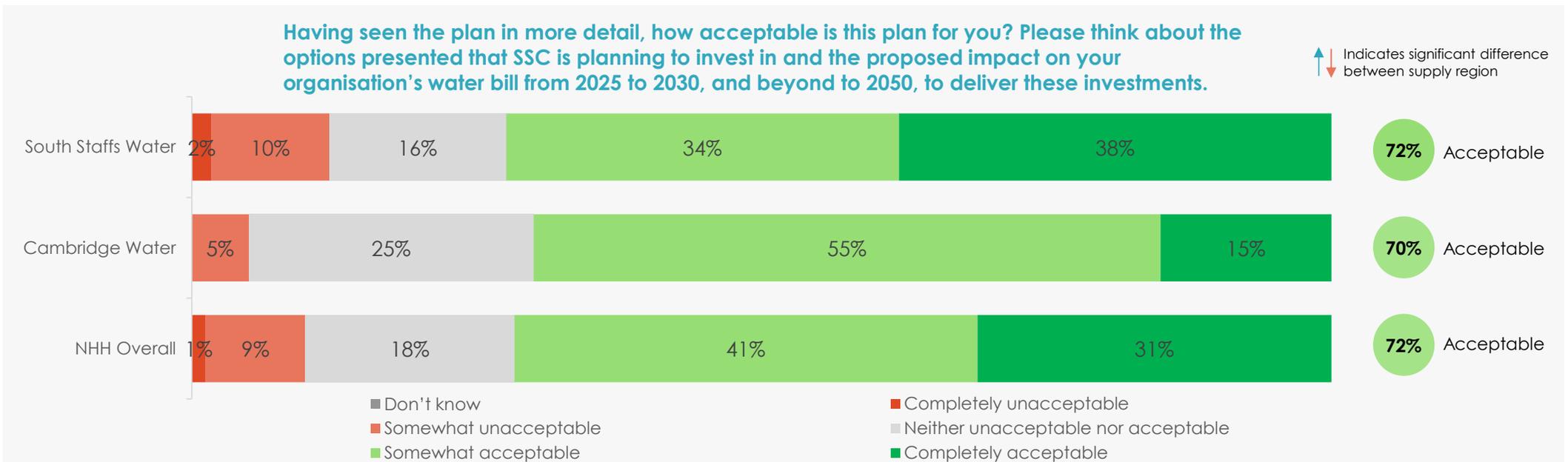
- The key reasons for not finding the plan acceptable all centred around cost.
- The most common reason cited was 'company profits too high already' which matches with some of the open text comments given for the uninformed plan.
- Following this came the four statements around affordability. For three of these statements, South Staffs customers were more likely to cite, although not significantly. However, for the reason 'I won't be able to afford this', Cambridge Water customers were more likely to cite than South Staffs customers.
- Combining the three statements around struggling to pay bills (Already struggling to pay other household/business bills'; 'Already struggling with the overall cost of living' and 'I won't be able to afford this', 21% of household customers cited at least one of these reasons. There were no significant differences between the regions, with 22% of South Staffs Water customers and 19% of Cambridge Water customers finding the plan unacceptable due to affordability.

What is/are the main reason(s) that you feel the proposals for your water resources across the period 2025 to 2030 and beyond to 2050 are NOT acceptable?



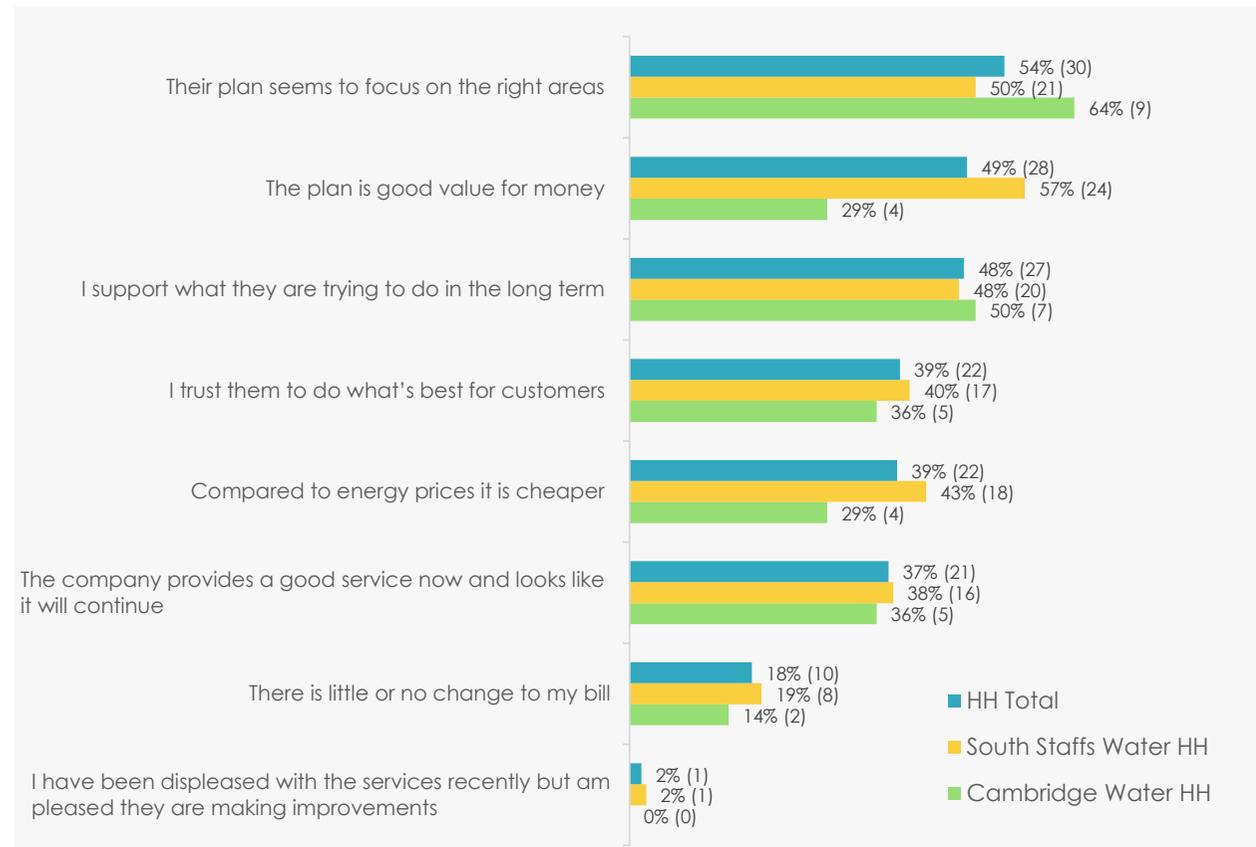
# Non-Household Informed Acceptability.

- 72% of non-household customers found the plan acceptable based on the informed stimulus – 11%p lower than the 83% who found the plan acceptable based on the uninformed stimulus.
- Again, there was little difference between the regions, however, South Staffs Water non-household customers did report a slightly higher acceptability % than Cambridge Water non-household customers (72% vs. 70%).



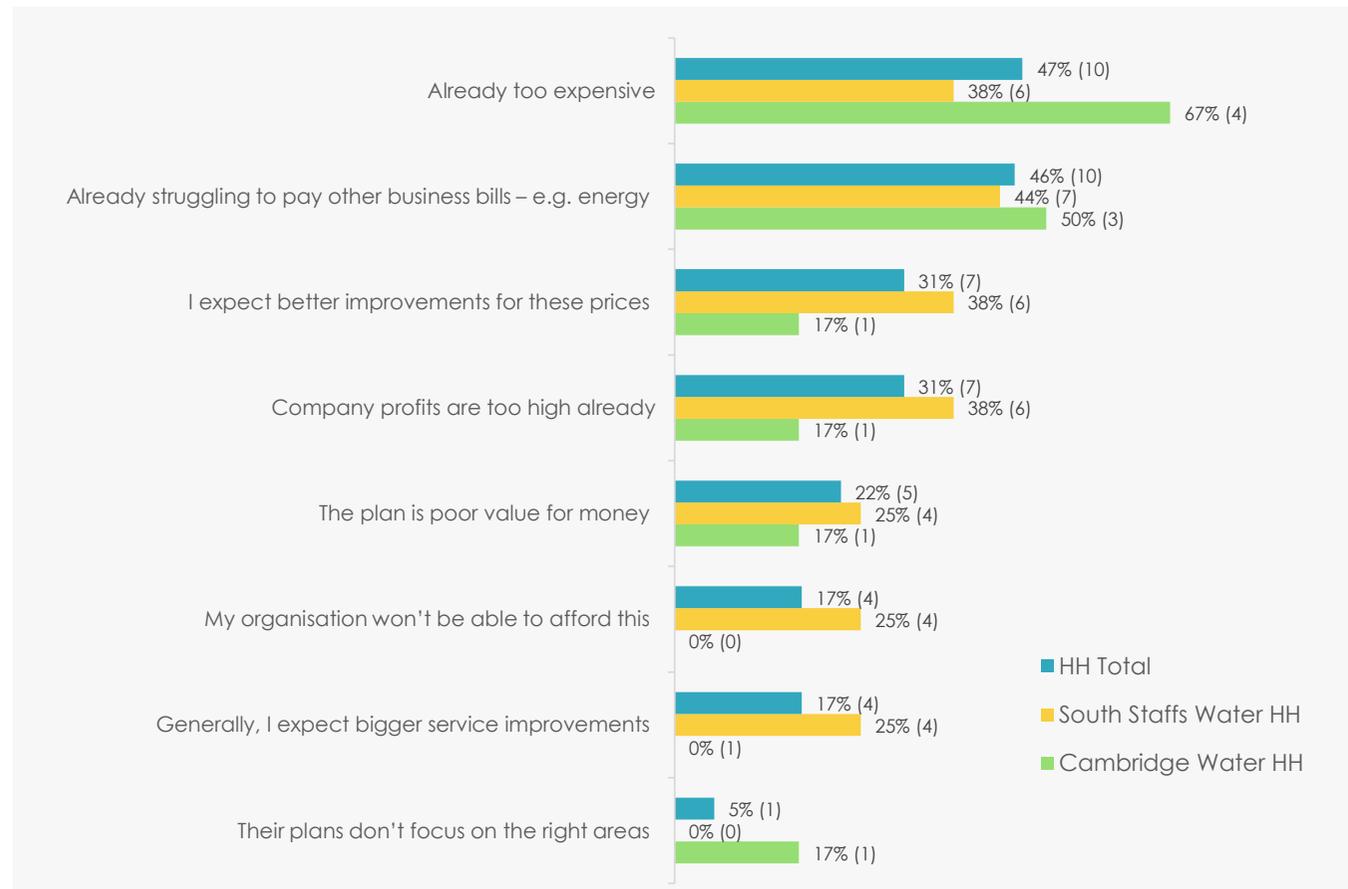
## Non-Household Reasons for Finding the Plan Acceptable.

- The main reasons given by non-household customers for finding the plan acceptable were that 'the plan seems to focus on the right areas' (54%); 'the plan is good value for money (49%) and 'I support what they are trying to do in the long term' (48%).
- Whilst there were no significant differences by supply region, Cambridge Water NHH customers were more likely to cite 'their plan seems to focus on the right areas', while South Staffs Water NHH customers were more likely to cite 'the plan is good value for money'.



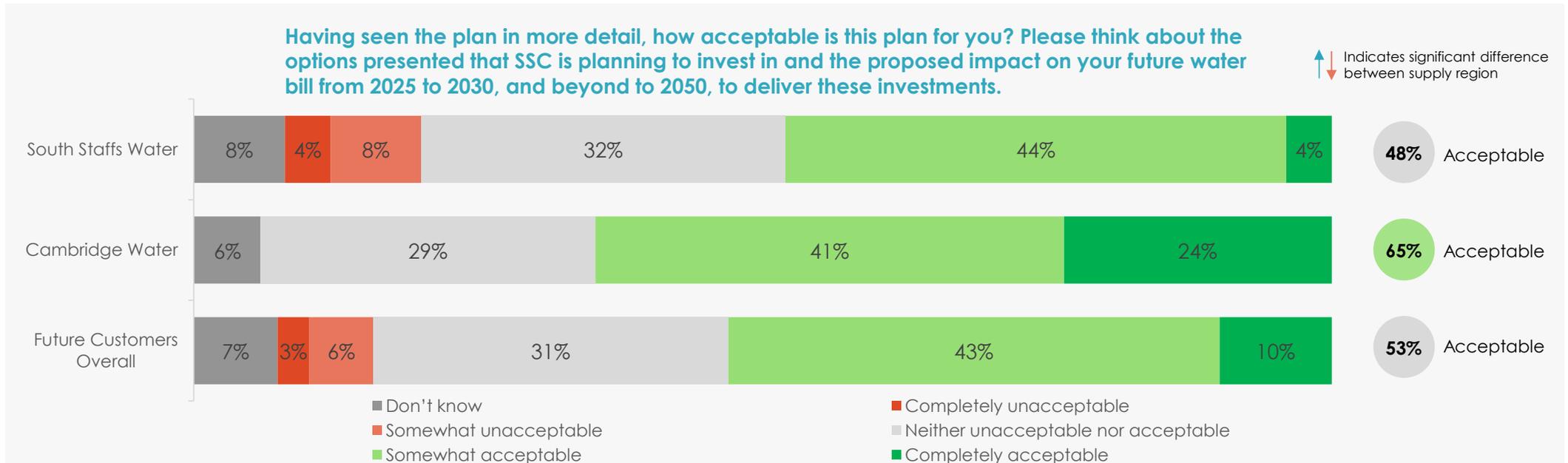
# Non-Household Reasons for Not Finding the Plan Acceptable.

- The top two reasons for not finding the plan acceptable were both around cost – ‘already too expensive’ (47%) and ‘already struggling to pay other business bills (46%). Both of these reasons were more likely to be cited by Cambridge Water customers, however, the sub-sample sizes are very small.



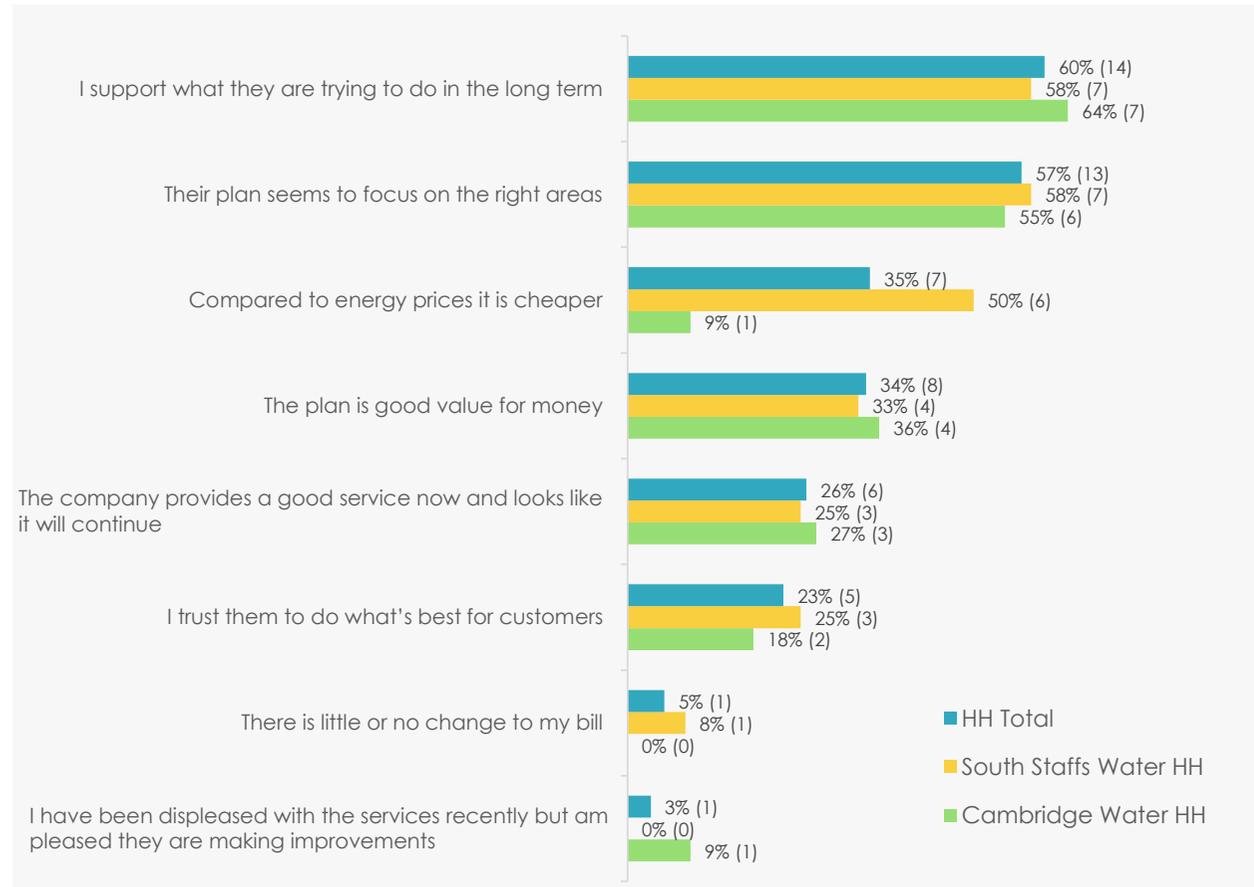
# Future Customer Uninformed Acceptability.

- Future customers also found the plan least acceptable based on the informed stimulus – 53% overall, which is 10%p lower than the 63% who found the plan acceptable based on the uninformed stimulus.
- There was no significant difference between the regions at the sample level, however, Cambridge Water future customers did report higher acceptability % than South Staffs Water future customers (65% vs. 48%).



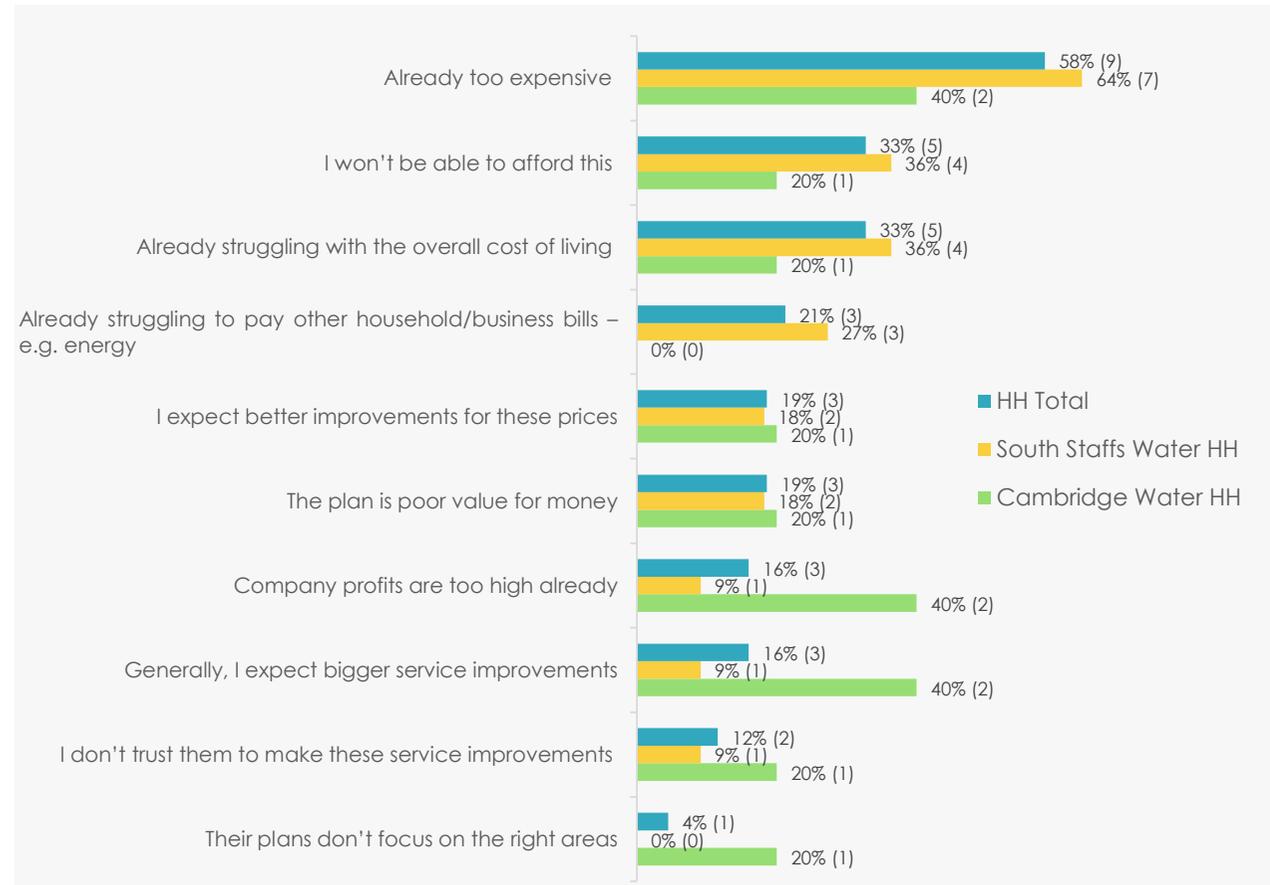
# Future Customer Reasons for Finding the Plan Acceptable.

- The main reasons given by future customers for finding the plan acceptable were the same as for household customers – 'I support what they are trying to do in the long term' (60%) and 'their plan seems to focus on the right areas' (57%).



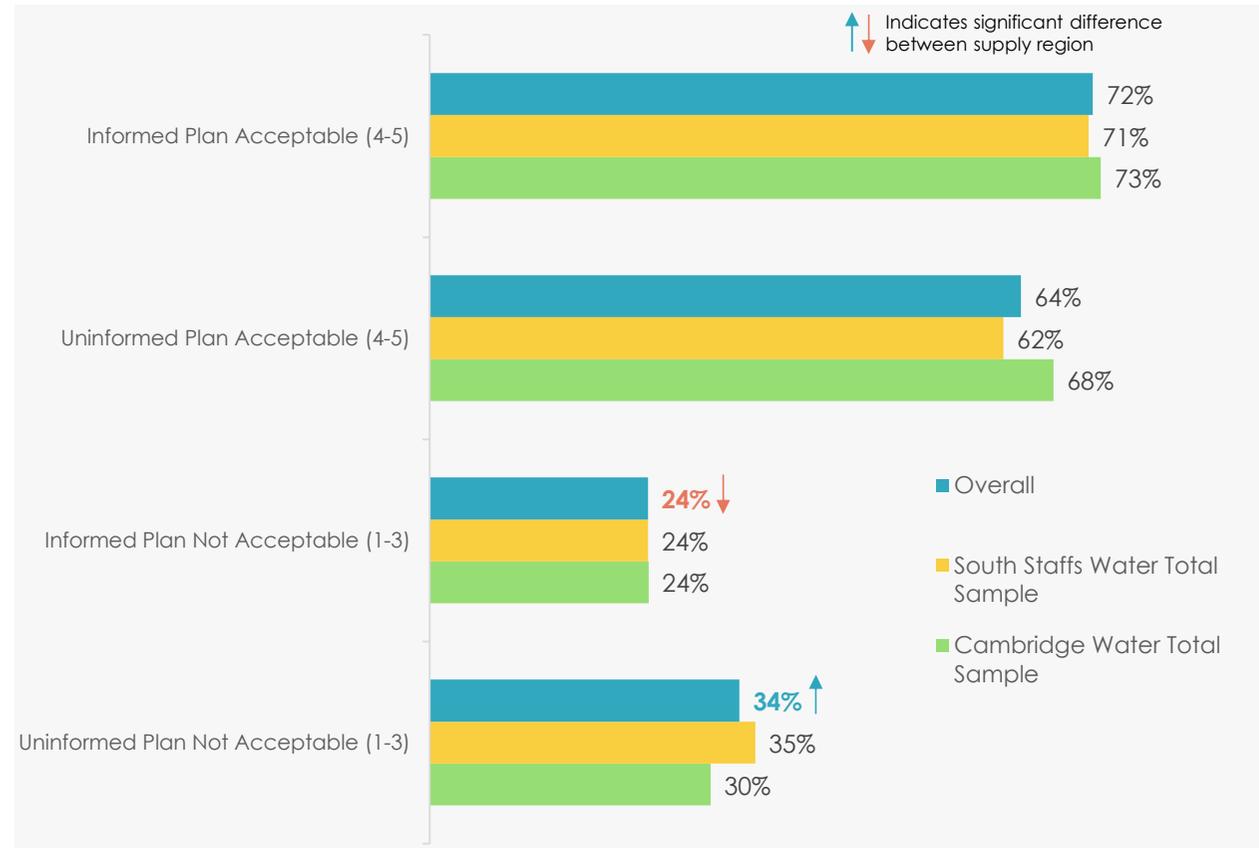
# Future Customer Reasons for Not Finding the Plan Acceptable.

- Reasons for not finding the plan acceptable amongst future customers also centred around affordability. Whilst future customers in the survey are not currently paying their water bill, they may be paying other bills, or have been influenced by the current climate.



# Informed vs. Uninformed Plan Acceptability

- Acceptability amongst customers having seen the informed plan stimulus fell by 8% from 72% to 64%.
- The proportion of customers who didn't find the plan acceptable was significantly higher for the informed plan (34%) (note – don't knows included but not shown on chart).
- Whilst 7% of customers didn't find the uninformed plan acceptable but did find the informed plan acceptable, 15% found the uninformed plan acceptable but the informed plan not acceptable. Isolating the group, we found that they are more likely male (60%) and have a younger age and SEG profile – they also had a higher current/future bill (£243 average).
- The reasons given by this group for not finding the informed plan acceptable centred around affordability – already struggling with other household bills (42%); already struggling with the cost of living (43%); however, their reasons were not significantly different to the rest of the sample.
- This group were less likely to state that the plan is necessary to meet demand / changing climate and that the rise in cost is inexpensive.
- It's difficult from the data to isolate the exact reason for the change in scores for informed acceptability, however, it's possible that the inflation information and presenting them with their future bill amount before answering the informed acceptability question had a negative impact.



# Informed vs. Uninformed Plan Acceptability

- The chart below illustrates the shift in acceptability responses between the informed and the uninformed plans highlighted on the previous slide.

HH	Total %	INFORMED ACCEPTABILITY				
		Don't know	Unacceptable	Neither/nor	Acceptable	Overall
UNINFORMED ACCEPTABILITY	Don't know	1%	1%	1%	1%	4%
	Unacceptable	0%	6%	1%	3%	11%
	Neither/nor	1%	4%	6%	4%	14%
	Acceptable	1%	8%	8%	55%	71%
	Overall	2%	18%	16%	63%	100%

8% of the HH sample found the informed plan acceptable but not the uninformed plan

55% of the HH sample found both the informed and uninformed plans acceptable

16% of the HH sample found uninformed plans acceptable but not the informed plan



turquoise

**Future Bill / Plan  
Affordability.**

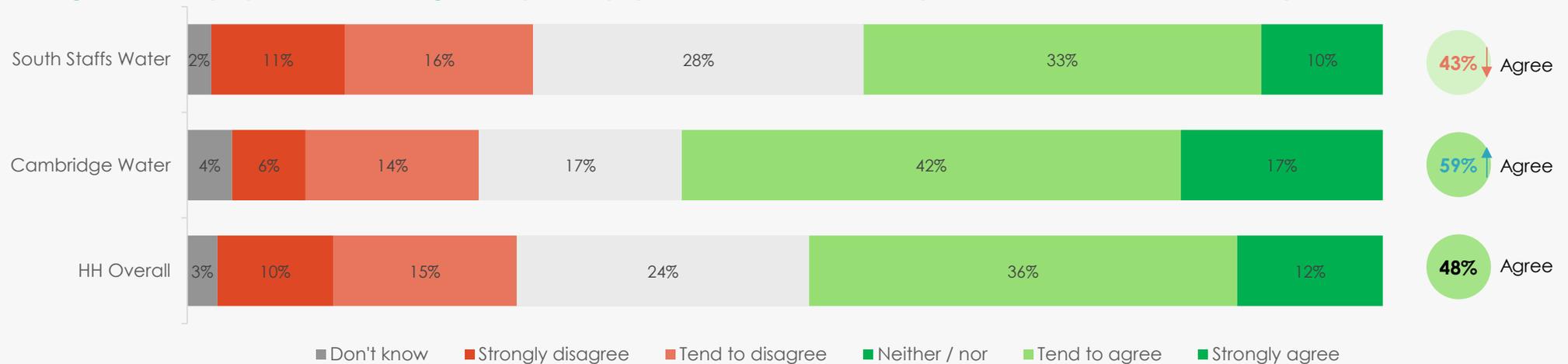
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# Household Plan Affordability.

- Having seen the plan in more detail via the informed stimulus, customers were shown what their future bill is forecast to be in 2025 (and beyond to 2050) allowing for inflation estimates. They were asked how affordable that bill will be for them.
- Overall, just 48% of household customers agree that their future bill will be affordable (6%p lower than the proportion of the sample who currently find their bill affordable), with a further 24% answering neither/nor (5%p higher than the proportion who gave this response for their current bill. A quarter of household customers (25%) disagreed that their future charges will be affordable (the same proportion who disagreed that their current bill is affordable).
- As with current affordability, there was a significant difference between the two supply regions, with Cambridge Water customers significantly more likely to agree that their charges are affordable compared with Cambridge Water customers (59% vs. 43%).

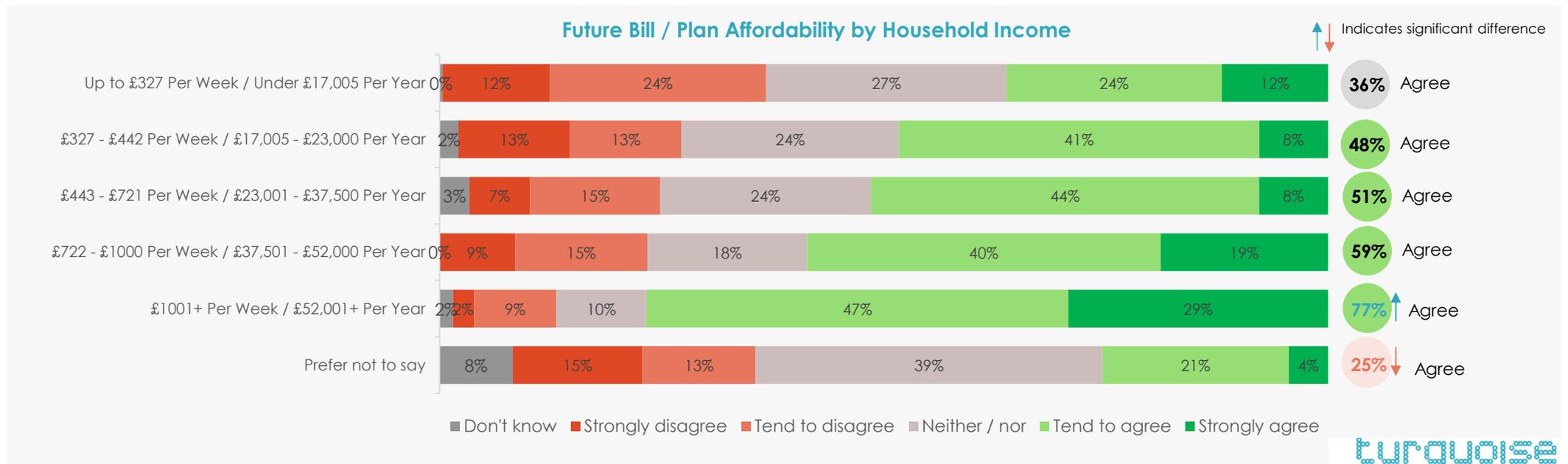
In 2025, your bill for year (and beyond to 2050), allowing for inflation, is forecast to be £X.xx. How much do you agree or disagree that the proposed water charges that you will pay from 2025 to 2030 and beyond to 2050 will be affordable for you?

↑ ↓ Indicates significant difference between supply region



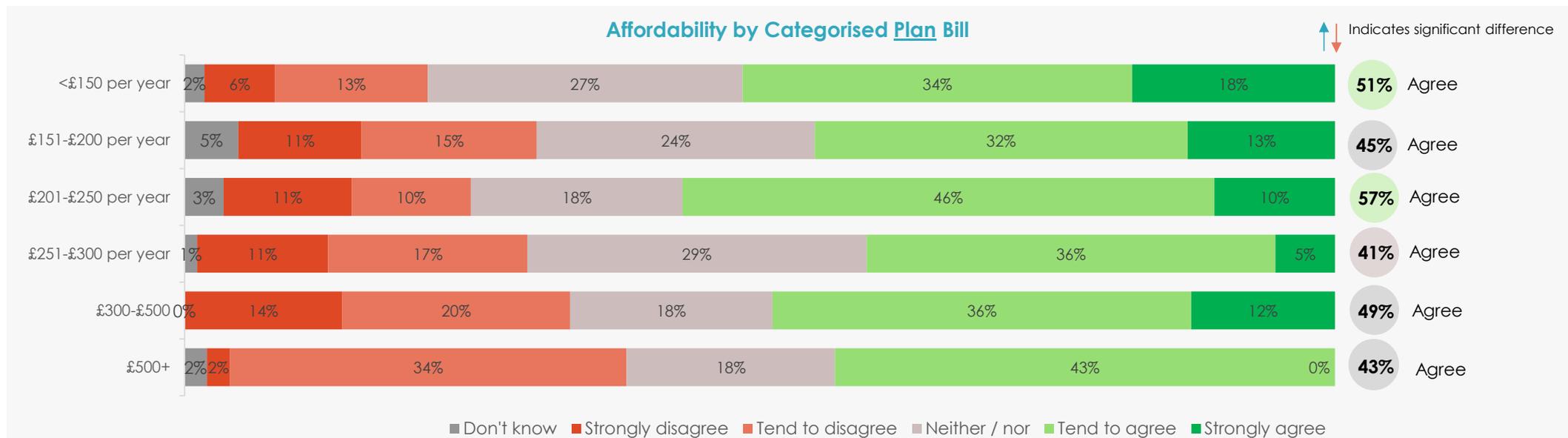
# Household Affordability by Household Income.

- Customers with higher annual household incomes were more likely to agree that their clean water bill was affordable. Customers in the highest income bracket of over £52,001 per year significantly so (77%).
- Customers who preferred not to divulge their annual household income were significantly less likely to agree that their bills are affordable (25%).
- 48% of customers with a household income of under £17,005 per year agreed that their clean water bills are affordable.
- Linked to these results, customers with higher social grades were more likely to agree that their water bills are affordable – AB significantly (65%).



# Household Affordability by Future Annual Bill.

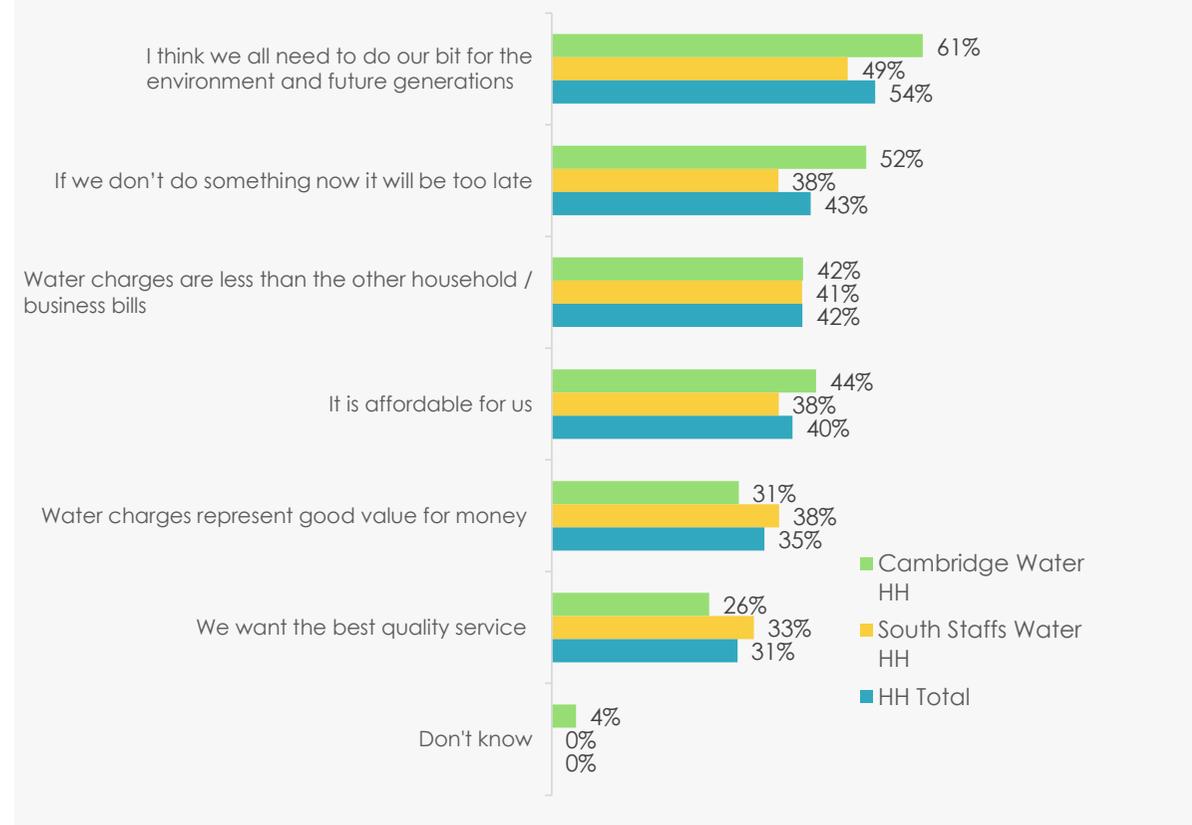
- There was actually little difference in affordability by future bill – at least no significant differences. However, customers with a future bill below £250 were more likely to agree that it will be affordable than those with a future bill of over £250 (50% vs. 45%).



# Household Reasons for Finding their Future Charges Affordable.

- Household customers across both regions were most likely to find their future bill affordable as they 'think we all need to do our bit for the environment and future generations' (54%).
- The second most common reason cited was 'if we don't do something now it will be too late' (43%) – this was more likely to be selected by Cambridge Water customers, although not significantly.
- A further 40% selected 'it is affordable for us' as their reason, however, note that this represents only 19% of the total household sample.

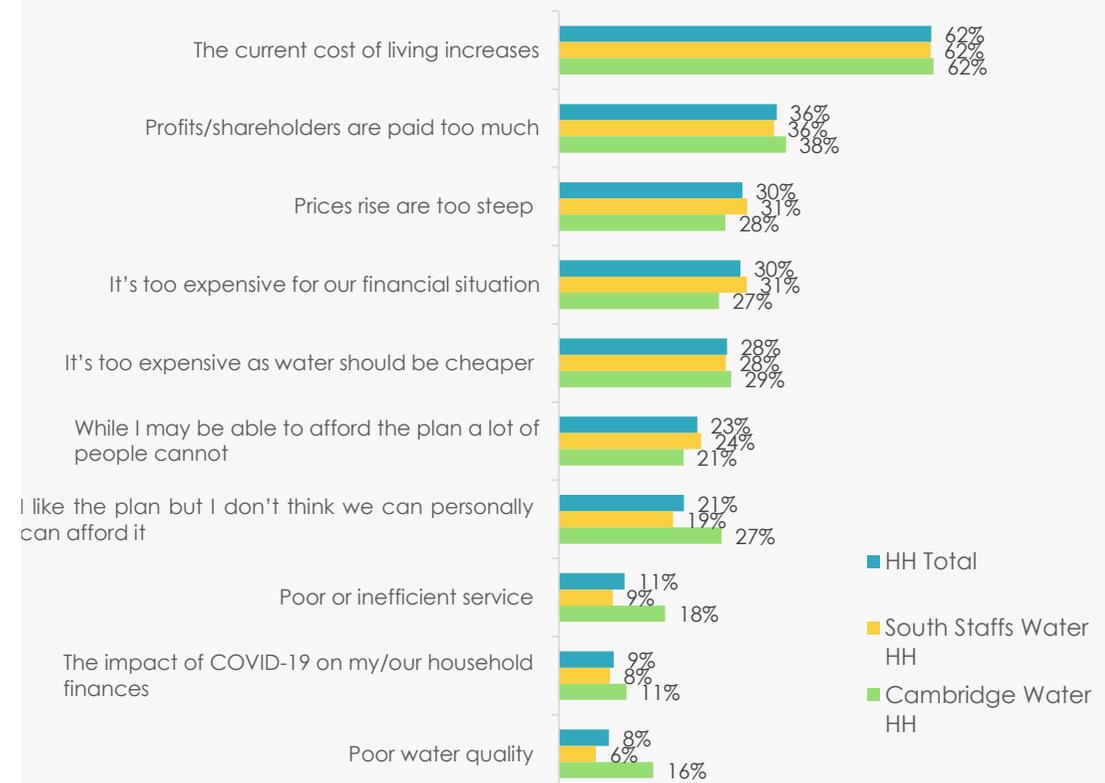
Why do you feel that the water charges you will pay from 2025 to 2030 and beyond to 2050 are affordable?



# Household Reasons for Not Finding their Future Charges Affordable.

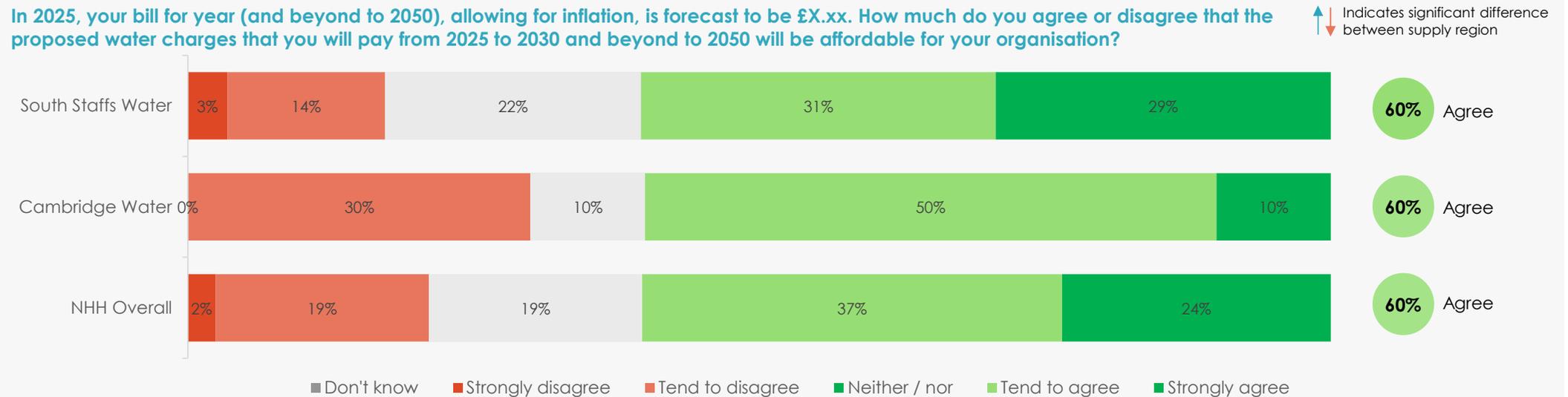
- The most common household response for not finding their future bill affordable was 'the current cost of living increases' (62% - 31% of the total HH sample).
- The second most cited reason was 'profits/shareholders are paid too much' (36%).

Why do you feel that the water charges you will pay from 2025 to 2030 and beyond to 2050 are not affordable?



# Non-Household Affordability.

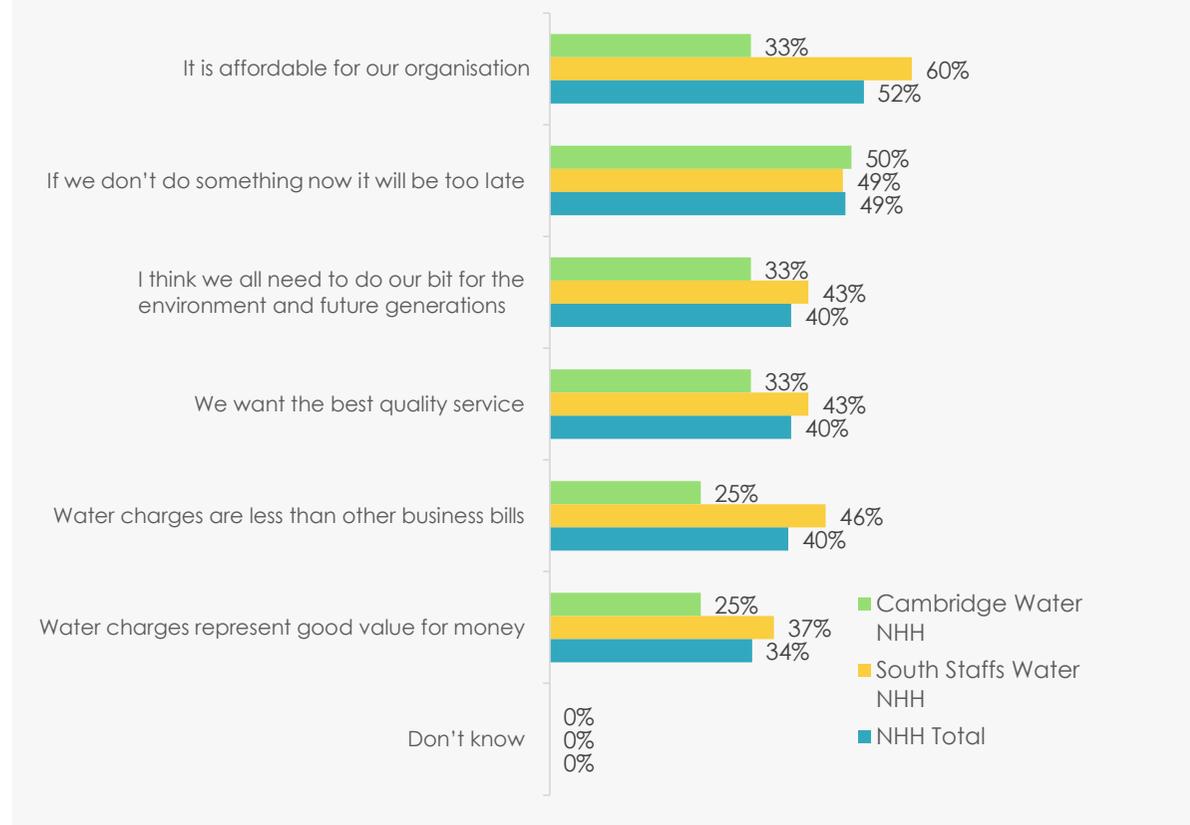
- The future bill, and its increase, didn't impact affordability for non-household customers with the same proportion (60%) agreeing that it will be affordable for their organisation.
- There was a slight increase in the proportion who disagreed that the future bill will be affordable, up from 19% to 21%.
- Unlike with current bill affordability, there was no difference between the two supply regions with both recording 60% agreement.



# Non-Household Reasons for Finding their Future Charges Affordable.

- The main reason given for finding future bills affordable amongst non-household customers was that it is affordable for their organisation (52%). This was more true of South Staffs business customers (60%) than Cambridge Water business customers (38%).
- Following this were the two main reasons given by household customers - If we don't do something now it will be too late (49%) and I think we all need to do our bit for the environment and future generations (40%).

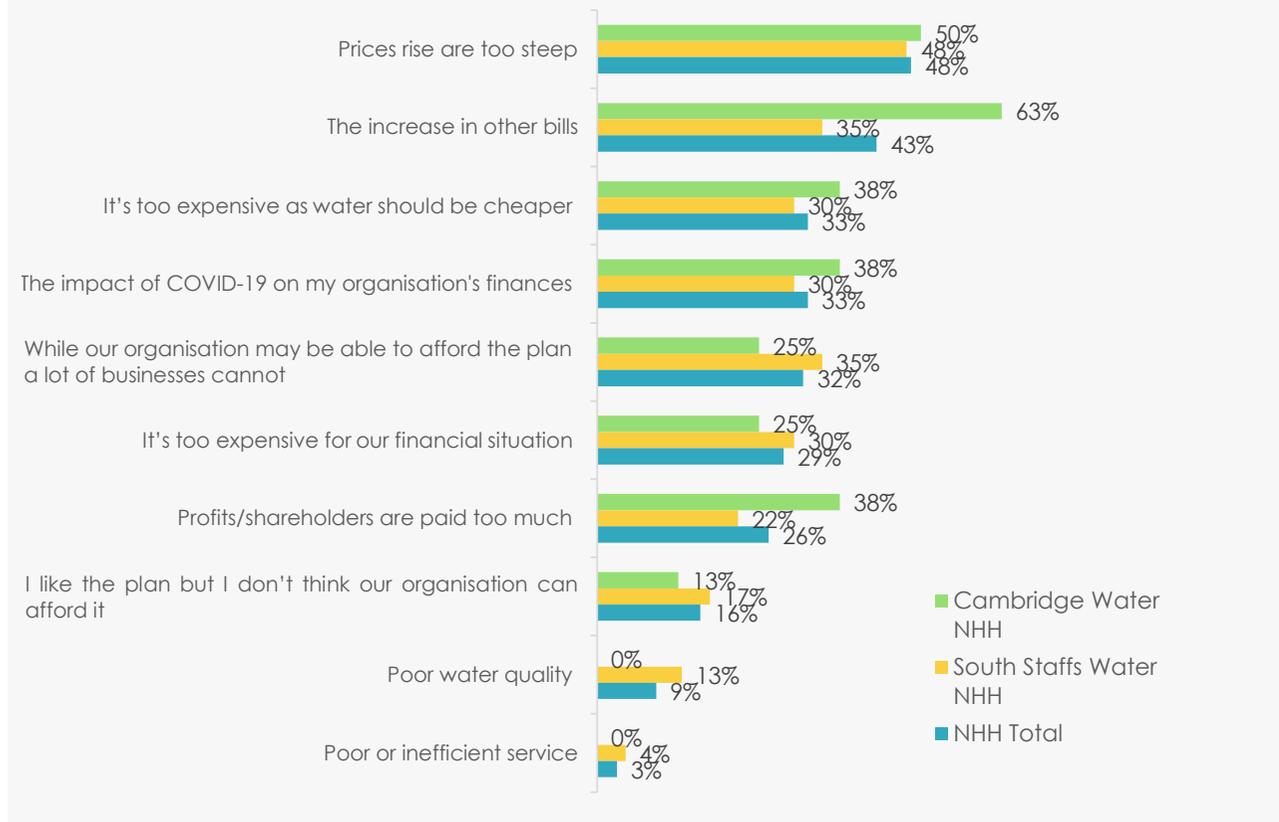
Why do you feel that the water charges you will pay from 2025 to 2030 and beyond to 2050 are affordable?



# Household Reasons for Not Finding their Future Charges Affordable.

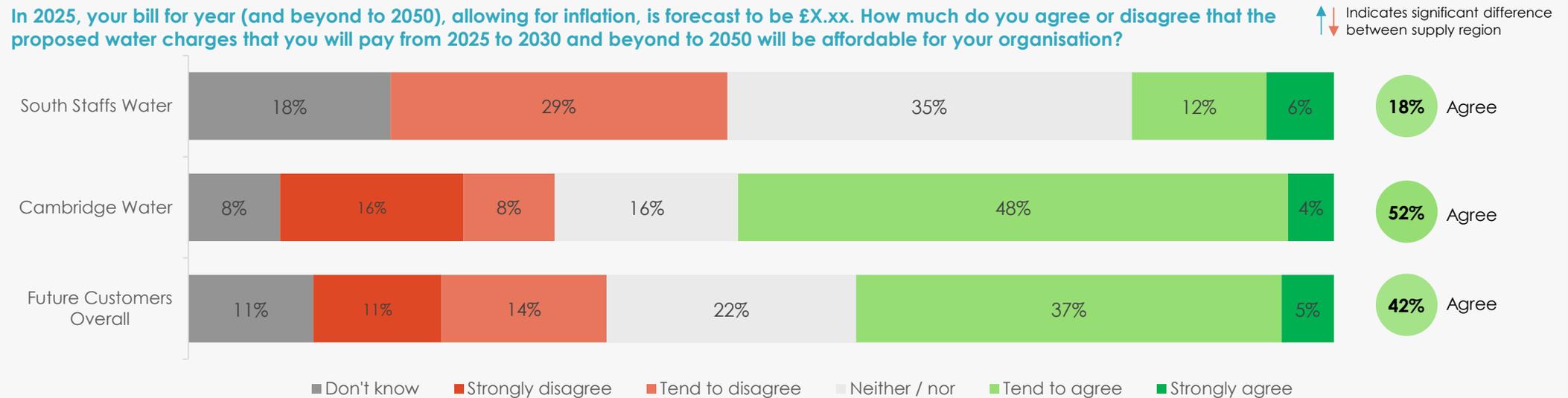
- The main reasons for non-household customers not finding their future bills affordable were both to do with cost – ‘price rises are too steep’ (48%) and the increase in other bills (43%).

Why do you feel that the water charges you will pay from 2025 to 2030 and beyond to 2050 are not affordable?



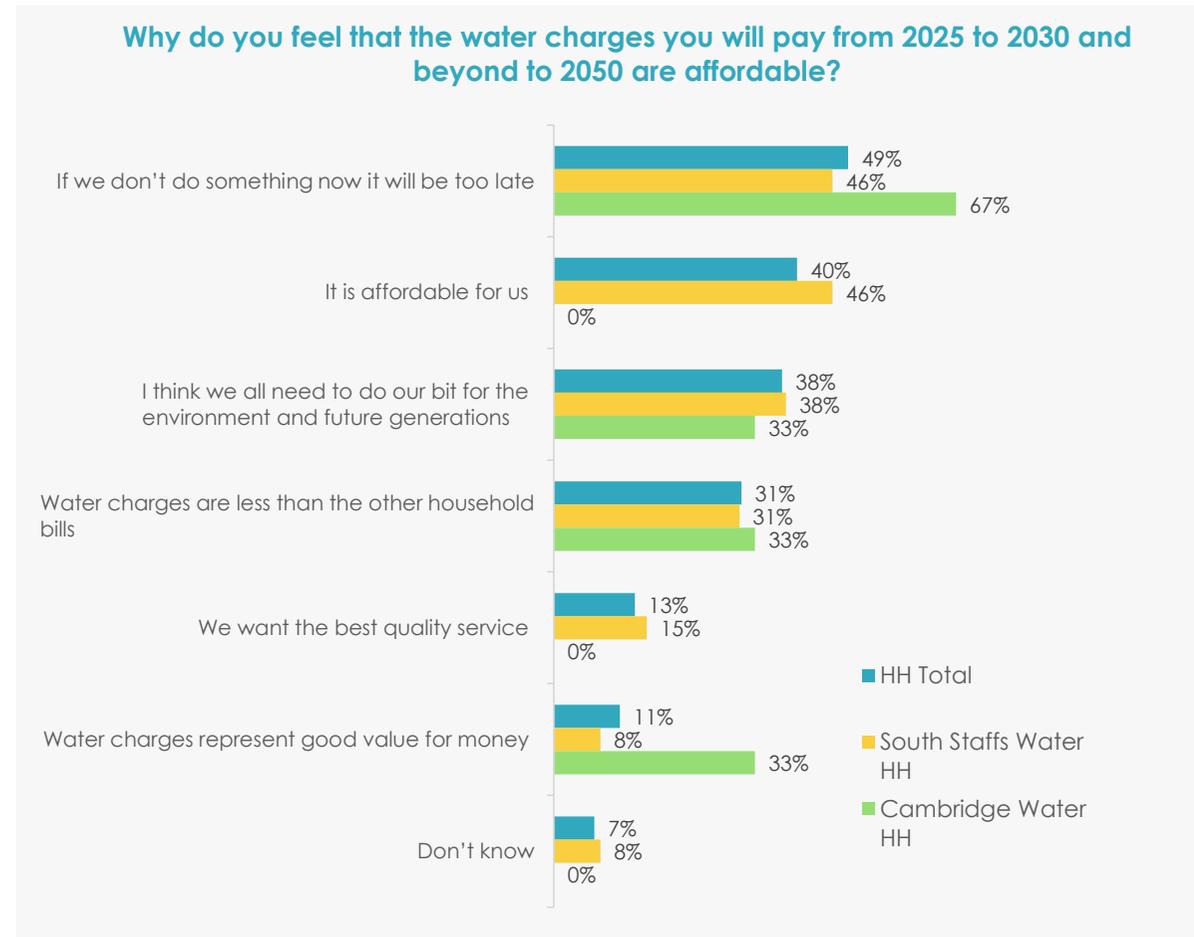
# Future Customer Affordability.

- Future customers were, understandably, unsure about the future affordability of their bills. A combined 33% answered either 'don't know' or 'neither / nor' – this was particularly true for Cambridge Water future customers of whom 53% gave either of these responses.
- Given the above, the score of 18% affordability for Cambridge Water is perhaps unsurprising.
- South Staffs future customers scored higher – 52% - however the difference was not significant given the small sub-sample sizes.



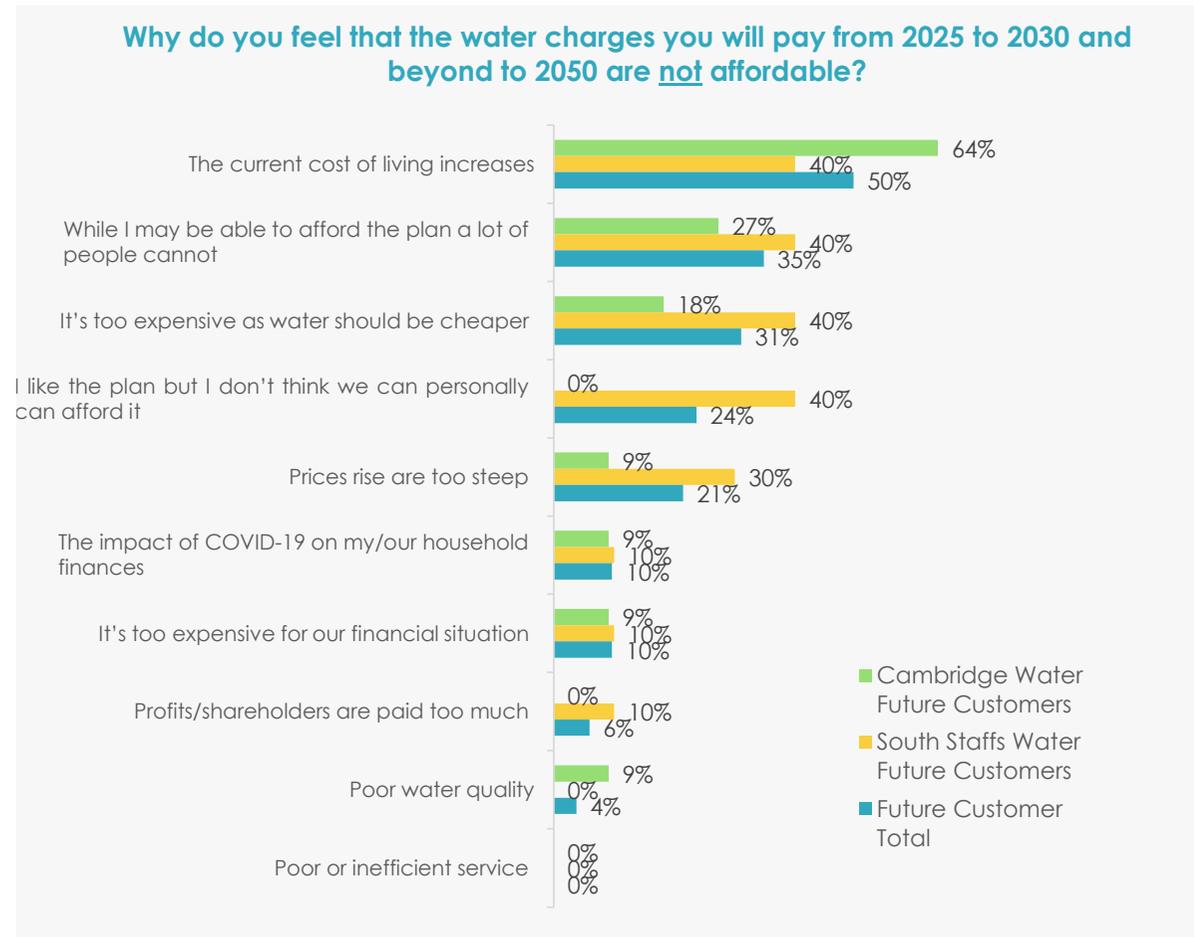
# Future Customer Reasons for Finding their Future Charges Affordable.

- Future customers across both regions were most likely to find their future bill affordable as they believe 'If we don't do something now it will be too late' (49%).



# Future Customer Reasons for Not Finding their Future Charges Affordable.

- The main reason given by future customers for not believing their future bill will be affordable is 'the current cost of living increases' (50%).
- The second most common reason given was 'While I may be able to afford the plan a lot of people cannot' (35%).



turquoise

**Adaptive Planning.**

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## Adaptive Planning Acceptability.

- Next, customers were introduced to the adaptive plan stimulus and asked whether they found the use of an adaptive planning approach acceptable, and why.
- Respondents were, again, held on the page until they had spent a reasonable time (45 secs) reading the adaptive planning stimulus to ensure, as far as possible, the most robust feedback.



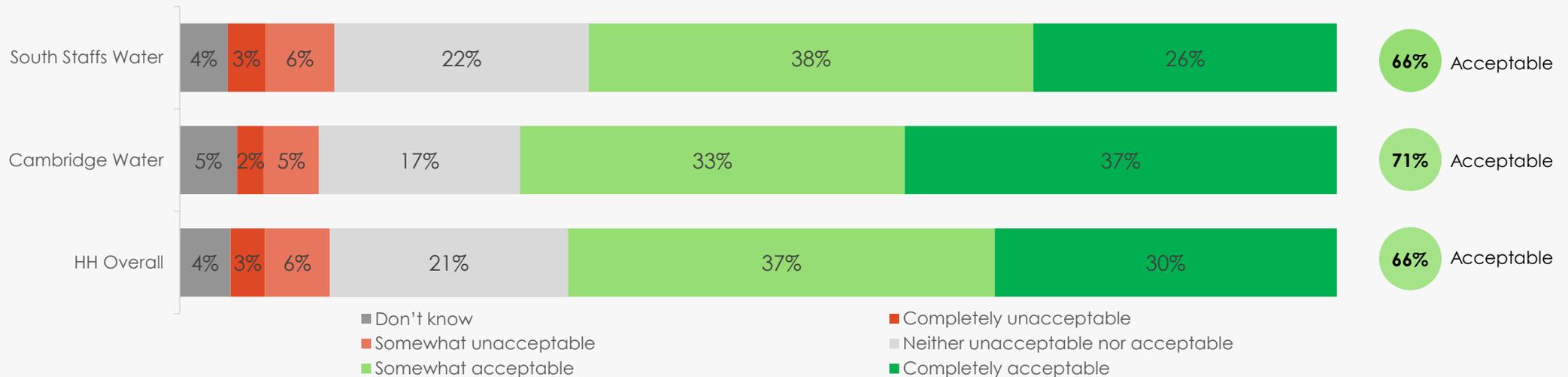
# Household Adaptive Planning Acceptability.



- Overall, two-thirds of household customers (66%) found the use of adaptive planning acceptable.
- Cambridge Water customers were slightly more likely to find the use of adaptive planning acceptable (71% vs. 66% South Staffs).
- Household customers with the highest household income bracket of £52,001+ per year were significantly more likely to find this approach acceptable (83%).
- There were no other significant differences by demographics.

How acceptable is it to you that SSC use an adaptive planning approach for their water resources plan shown to you earlier?

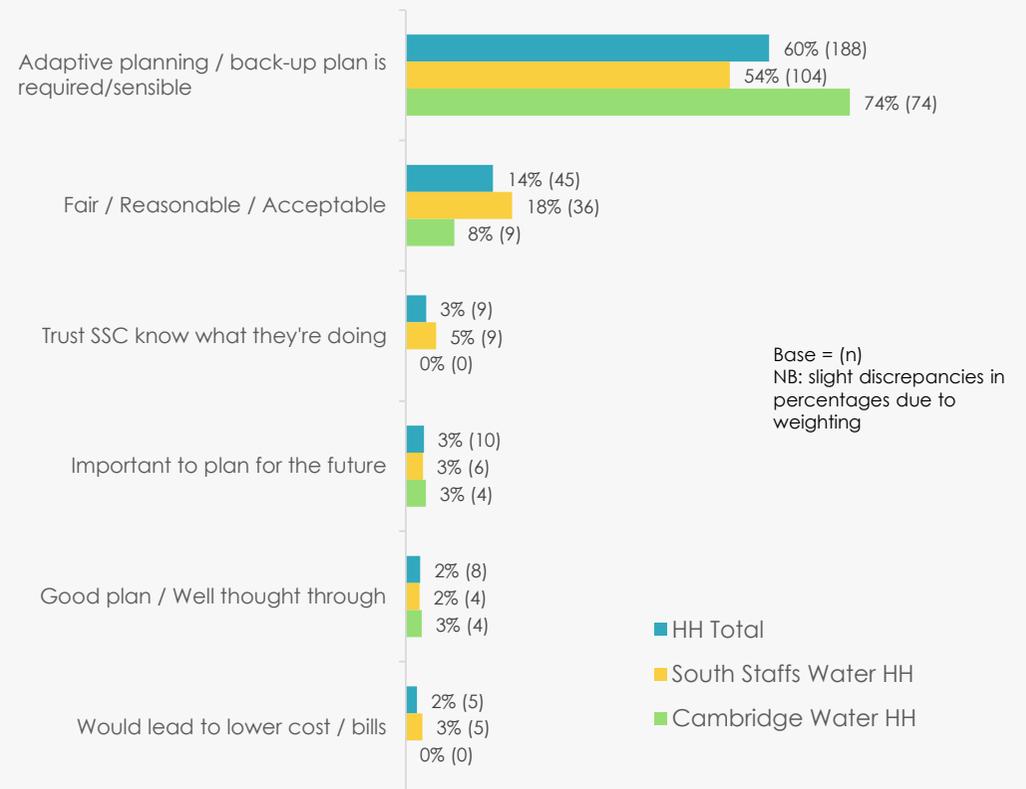
↑ ↓ Indicates significant difference between supply region



# Household Reasons for Finding the Use of Adaptive Planning Acceptable.

- The key reasons given by household customers who found concept of adaptive planning acceptable were that the adaptive plan / having an adaptive plan is required/sensible – particularly given the uncertainty around changing climate and demand estimates. This response was cited by 60% of household customers who found adaptive planning acceptable. This response was more common amongst Cambridge Water customers (74%).
- The other main response was around the adaptive plan itself, with 14% finding the plan fair, reasonable, and/or acceptable.
- A further 3% found the adaptive planning approach acceptable as they trust that SSC know what they are doing – this response however was exclusive to South Staffs Water customers.

(If did find Adaptive Planning acceptable) Why do you say that?



# Household Reasons for Finding Adaptive Planning Acceptable.

"Just common sense. We've no idea what will happen in the meantime so they have to be flexible."  
- South Staffs HH Customer, Male, 45-54

"I think it's a good thing to have plans in place if the original plan should change should there be a problem it's easier to control and manage."  
- South Staffs Water HH Customer, Female, 18-34

I think you have to be realistic and appreciate that plans can change when you are dealing with movable variables."  
Cambridge Water customer, Male, 35-64

"I accept that circumstances can change plans, but I wouldn't wish to see my bills increase too much owing to unforeseen circumstances impacting on the plans!"  
South Staffs HH customer, Male, 65+

I think you have to be realistic and appreciate that plans can change when you are dealing with movable variables."  
Cambridge Water customer, Male, 35-64

"Makes sense to have a plan B - not everything can always go to plan and no one can foresee how our future planet will look like."  
Cambridge Water customer, Female, 16-34

"If we need to act I trust that this is done to secure a future service for everyone. We need to be flexible to respond to any changes / unforeseen events. We cannot afford not to act."  
- South Staffs HH Customer, Female, 65+

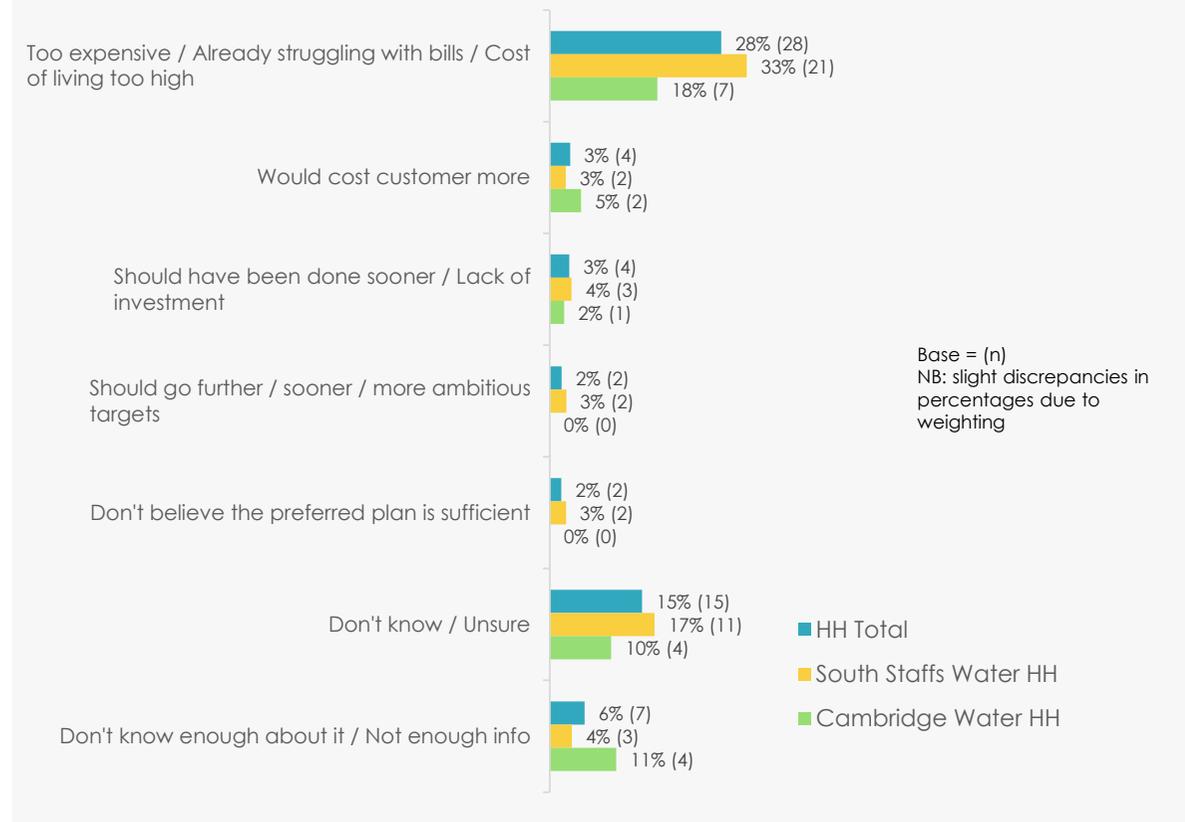
"The future and changes in technology are very hard to predict (think take up of EVs compared to forecasts) so a plan needs to be flexible."  
- Cambridge Water HH customer, Male, 65+

"Because you have considered factors that may occur and planned accordingly. There are things that are beyond your control but you are at least considering them and developing a plan."  
- Cambridge Water HH customer Female, 35-64

# Household Reasons for Not Finding the Use of Adaptive Planning Acceptable.

- The key reasons for household customer who didn't find the concept of adaptive planning acceptable centred around the cost of the plan rather than its detail.
- A handful (3%) of household customers cited that the adaptive plan would cost the customer more.
- Other criticisms were that the plan should have been made sooner / there had been a lack of recent investment and that the plan should start sooner / go further.
- Positive responses have been excluded from the chart, although there were a number of customers who gave a mixed response – for example, whilst they could see the need for adaptive planning, they were concerned by the cost.

(If did not find Adaptive Planning acceptable) Why do you say that?



# Household Reasons for Not Finding Adaptive Planning Acceptable.

“Household of two retirees living on pensions which will not keep up with the forecast rises in the cost of living. We are also proud and do not want to be forced into the benefits system.”  
South Staffs Water HH Customer, Male, 65+

“Being cynical I feel like the company are already planning to not achieve it's targets. Not achieving them shouldn't be an option.”  
South Staffs Water HH Customer,  
Female, 35-64

“It could cause an increased cost to customers in comparison to the cost you have suggested. This already accounts for paying for water works in a different region to the one I live in, which feels like it should be split by the region in which it is being used.”  
- South Staffs HH Customer, Female, 16-34

“CW should have been planning this for YEARS. These 'plans' are utter crap as the main change needs to be to your infrastructure - it is over 60 years old (older than me) and aged like fuck. You have the profits to upgrade but would rather fill your pockets than help the public. Get rid of the scum at the top like how we need to get rid of SEWERAGE IN OUR WATERWAYS (placed there by companies like Cambridge Water).”  
- Cambridge Water HH Customer, Female, 35-64

“Although the population may understand that when improvements are made, it comes with a price but utility suppliers such as electric and gas are already stepping up prices for their own gains. Water is an essential supply which all households should have access to hot and cold water without stressing over increased bills.”  
- South Staffs Water HH Customer,  
Male, 18-34

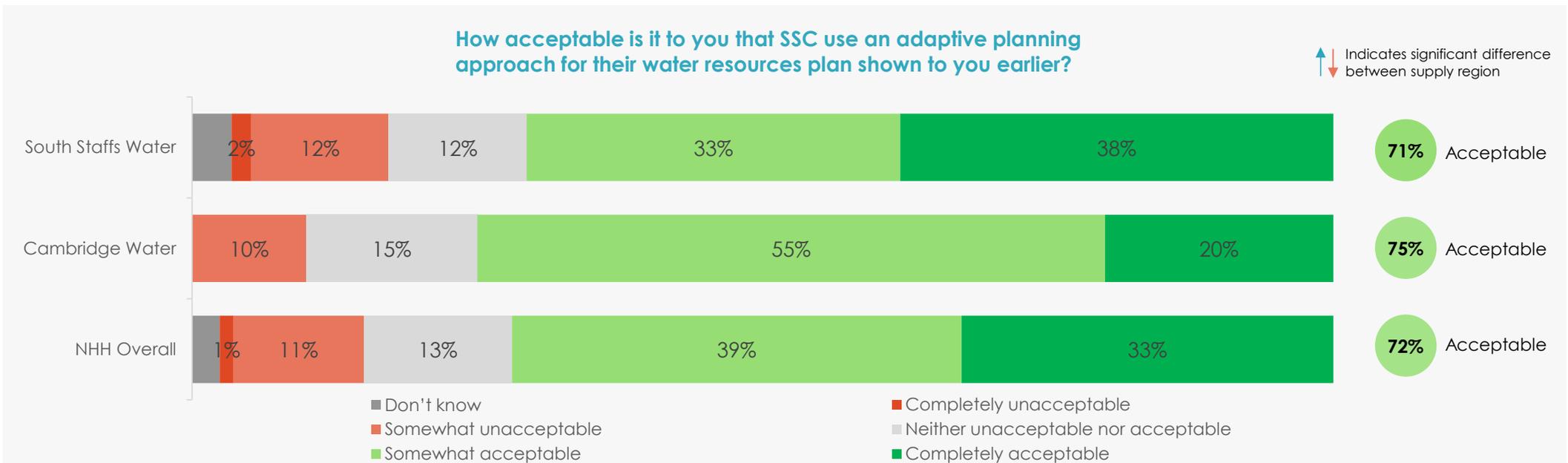
“It's weird that you should seek customers approval for increased costs if the plan fails. You know your business well, so should be able to predict fairly accurately the costs of such plans. If you then overcome the targets and save money, wouldn't it be expectable to get it passed down to customers? What would you do if we didn't agree to alternative plans and you saved, say 15%? Would you keep it just because we didn't agree to pay more if you aren't able to meet your targets?”  
Cambridge Water customer, Male, 35-64

“The entire premise of this adaptive plan is basically “If we, Cambridge Water, do not achieve what we promised to achieve, you, the customer, will foot the bill to fix it”. If you believe in your original plan, and will be increasing customer bills to implement it, any shortcomings or failures should be rectified via reinvesting profits, senior management pay cuts, and lowering shareholder dividends.”  
Cambridge Water HH customer, Male, 18-34

# Non-Household Adaptive Planning Acceptability.

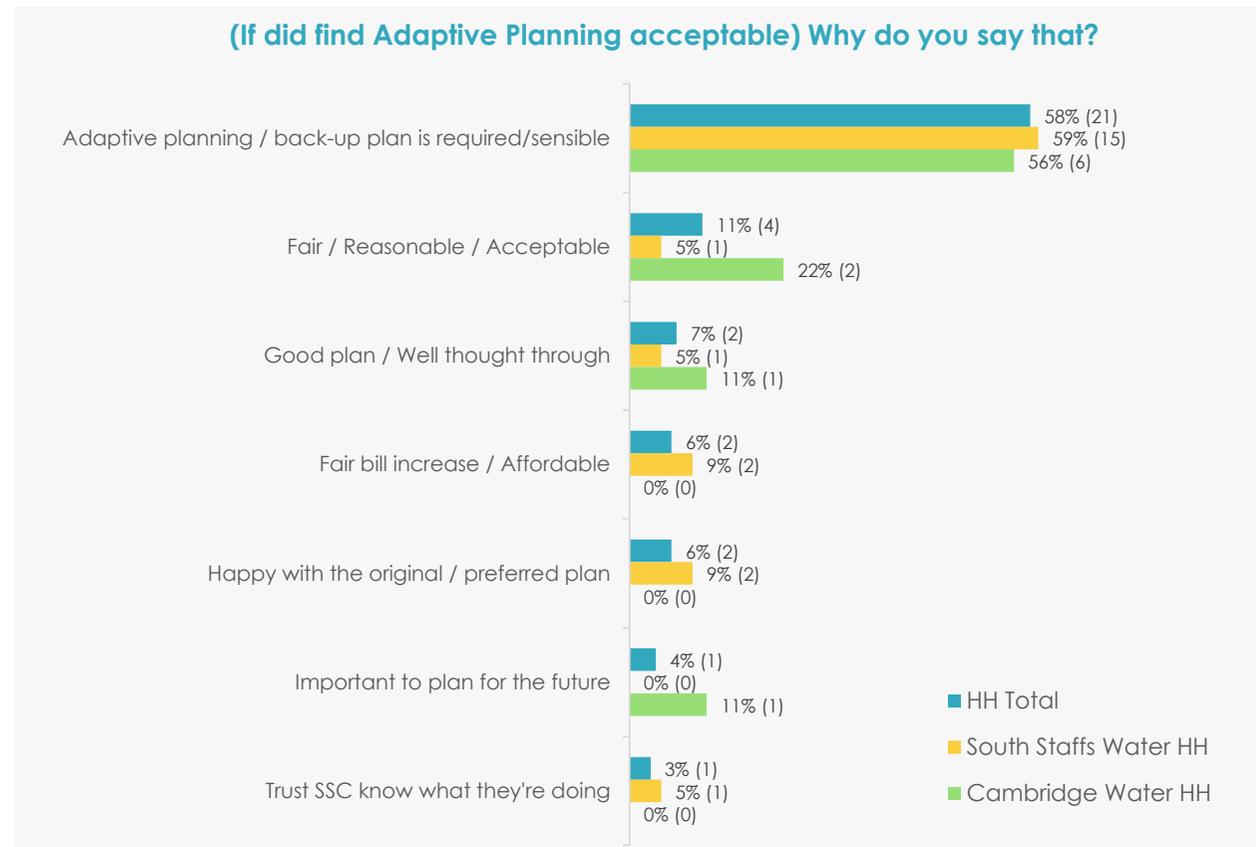


- 72% of non-household customers found the use of adaptive planning acceptable.
- There was little difference by supply region, with 71% of South Staffs non-household customers, and 75% of Cambridge Water non-household customers finding adaptive planning acceptable.
- Non-household customers representing Micro businesses were least likely to find adaptive planning acceptable (53%), however, not significantly.



## Non-Household Reasons for Finding the Plan Acceptable.

- The main reasons given by non-household customers for finding the use of adaptive planning acceptable were similar to household customers – just under 60% cited that adaptive planning was sensible and/or required.
- Other reasons given were that the use of adaptive planning was fair, reasonable, and/or acceptable (7%); that the plan was good / well thought through (7%) and that the bill increase was fair / affordable (6%).



# Non-Household Reasons for Not Finding the Use of Adaptive Planning Acceptable.

- Due to the small number of non-household customers who didn't find the plan acceptable, below is a selection of the verbatim comments.

"Energy charges are going to make no one have any money."  
- Cambridge Water NHH customer

"It's a good plan and if executed properly should be no need for alternative plans."  
South Staffs Water NHH Customer

"Because I think its a good idea but just not best for money reasons.."  
- Cambridge Water NHH customer

"You cannot charge and make profit on a basic human need and right."  
South Staffs Water NHH Customer

"There are some advantages and disadvantages."  
- Cambridge Water NHH customer

"Prices will increase to unpayable amounts in some areas."  
South Staffs Water NHH Customer

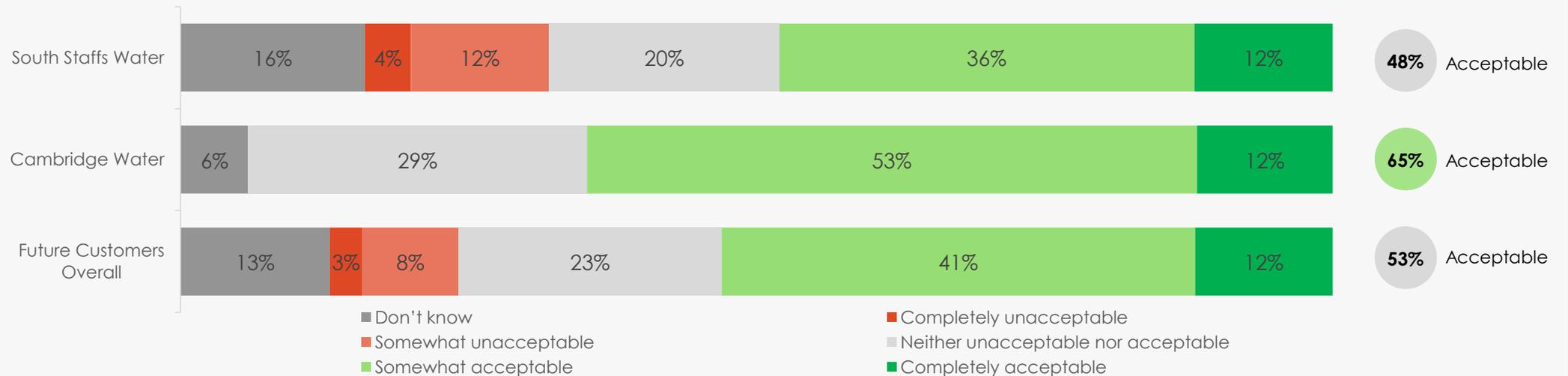
# Future Customer Adaptive Planning Acceptability.



- Future customers also found the concept of adaptive planning least acceptable– 53% overall – however, there is likely a lack of knowledge having an impact with relatively high levels of ‘don’t know’ responses.
- There was no significant difference between the regions at the sample level, however, Cambridge Water future customers did report higher acceptability % than South Staffs Water future customers (65% vs. 48%).

How acceptable is it to you that SSC use an adaptive planning approach for their water resources plan shown to you earlier?

↑ ↓ Indicates significant difference between supply region

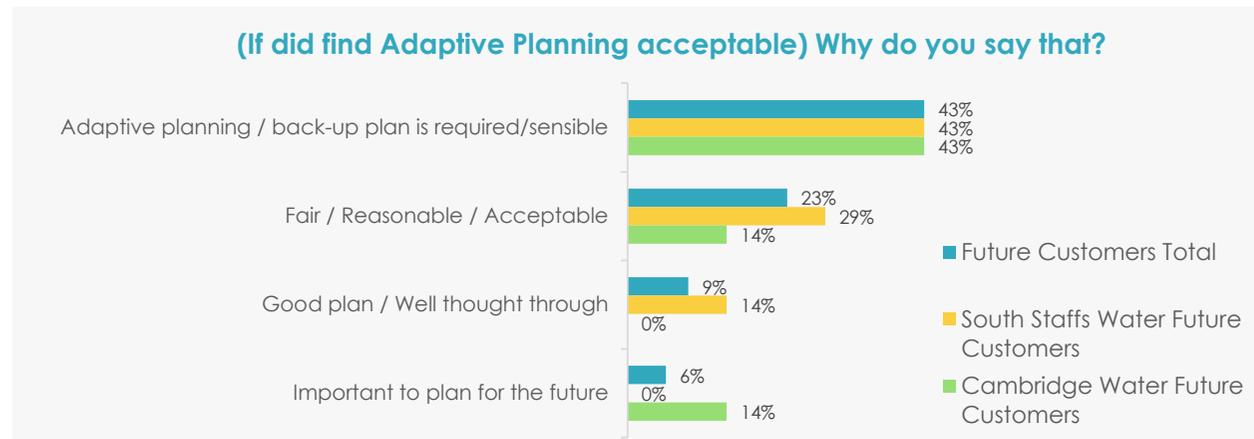


# Future Customer Reasons for Finding the Plan Acceptable.

- The main reasons given by future customers for finding the plan acceptable were the same as for household and non-household customers – ‘adaptive planning / back-up plan is required / sensible’ (43%) and ‘fair / reasonable / acceptable’ (23%).

“a lot of different factors such as climate change and inflation could change the course of the plan. If a plan is rushed it could increase water bills for people and wouldn't be as effective.”  
South Staffs Water future customer

“It is good that there is an adaptive plan in place however with the inflation and the current recession, it will still be unaffordable for many people across the uk.”  
South Staffs Water future customer



“They have a good range of factors they take into consideration and developed appropriate plans for the situations.”  
- Cambridge Water future customer

“They are planning for the worse which is good as that means we will have water in the future. Rather than them not having a plan and we have a yearly round drought.”  
- Cambridge Water future customer

# Future Customer Reasons for Not Finding the Plan Acceptable.

- Due to the small number of future customers who didn't find the plan acceptable, below is a selection of the verbatim comments.

"I think people need to know specific details in advance to prepare for things like inflation."  
South Staffs Water future customer

"Not interested. Cost of living is too high."  
South Staffs Water future customer

"Too expensive out of order."  
South Staffs Water future customer

"Not good for the customer."  
South Staffs Water future customer

"It's up to them what they use as long as they do their job we won't complain."  
- Cambridge Water future customer

"It depends which way it goes."  
- Cambridge Water future customer



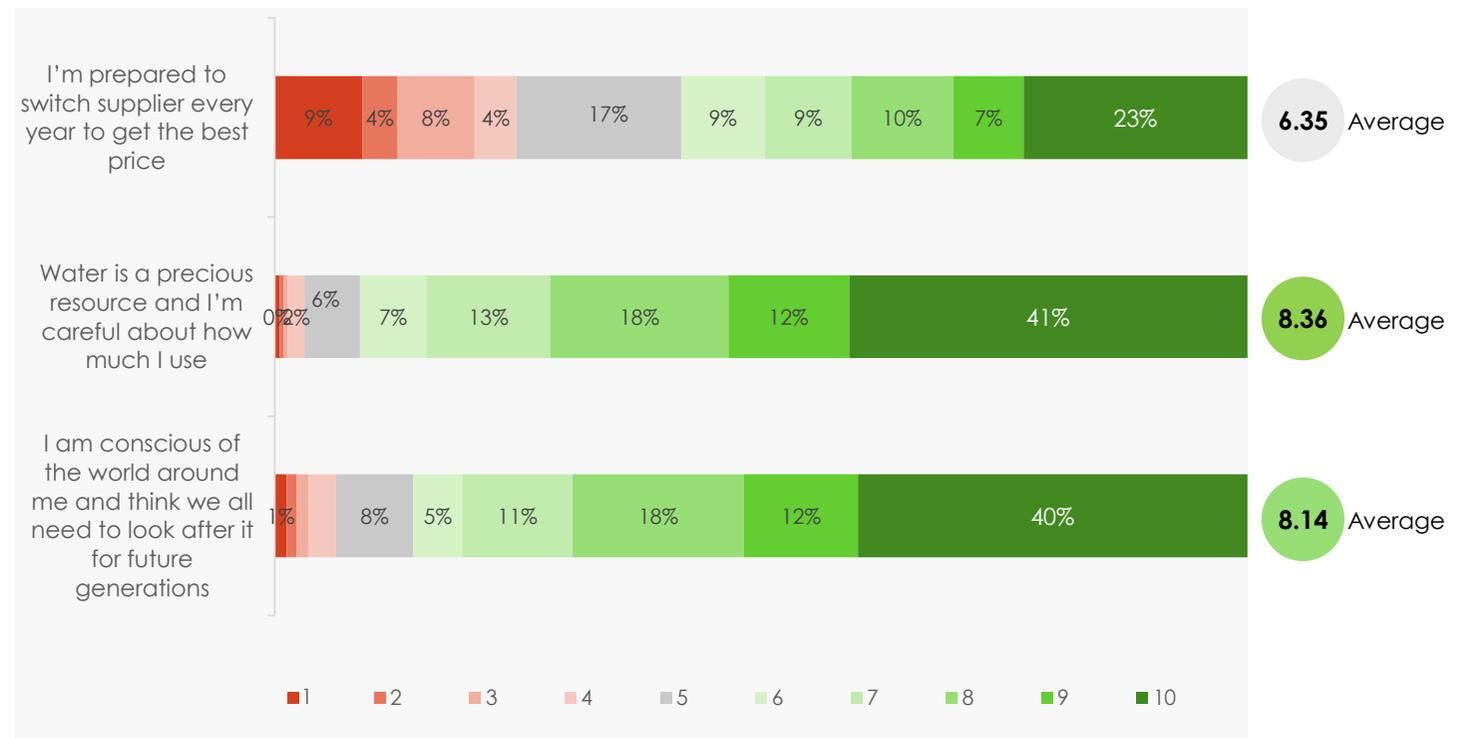
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Further Customer  
Attitudes.



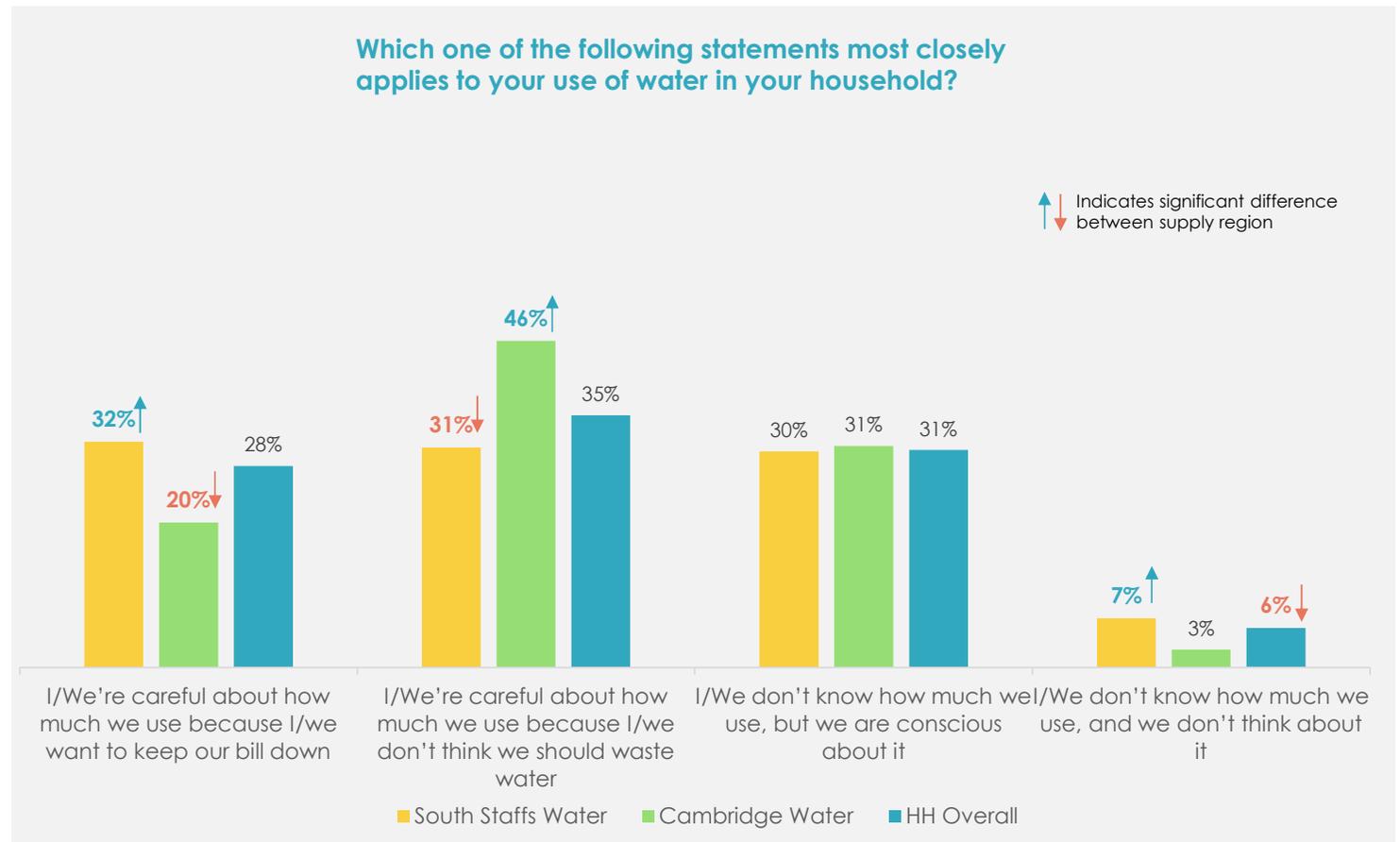
# Household Customer Attitudes Towards Water.

- Generally, customers are not prepared to switch suppliers every year to get the best price. However, 23% did score a 10 or 10 for this question so not an insignificant number.
- Attitudes towards the environment are strong, with over 80% agreeing (scored a 7-10) for both questions surrounding water as a precious resource.
- There were no significant differences by region.
- The key demographic differences are by age, with older customers (over-65) scoring significantly high for the two water as a precious resource metrics. In contrast, younger customers (16-34 – and future customers) scored significantly high for being prepared to switch supplier.



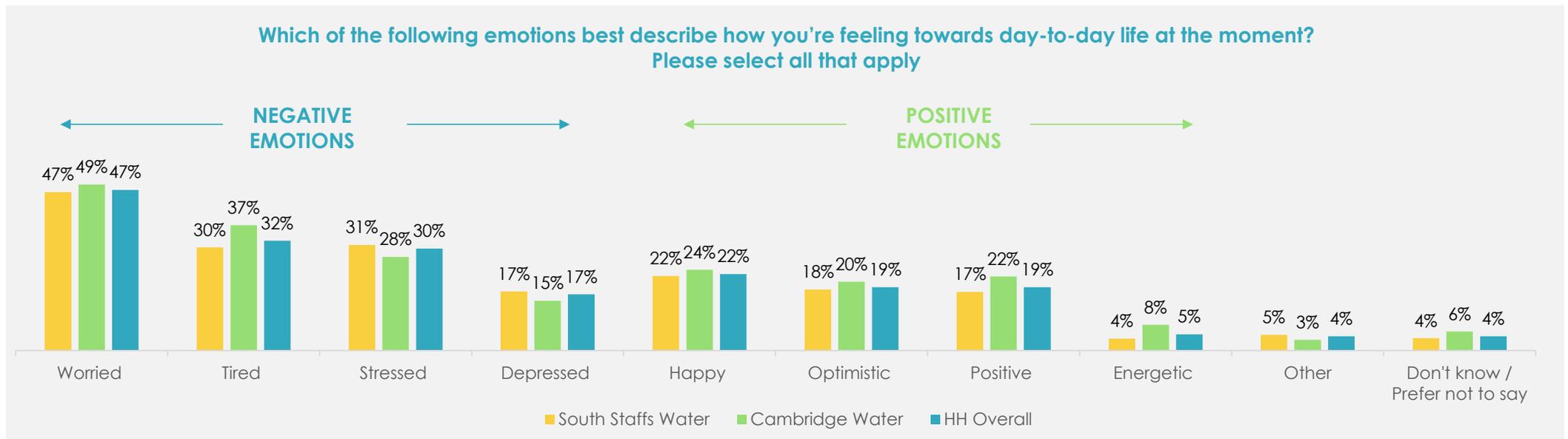
# Household Customer Attitudes Towards Water Usage.

- There are significant attitudinal differences between the regions in terms of their household water usage.
- Cambridge Water customers are significantly more likely to be careful with their water usage because they don't think water should be wasted, whereas South Staffs Water customers are significantly more likely to be careful with their usage to keep their bill down.
- South Staffs Water customers are also significantly more likely not to think about their usage (although only 7%).
- Customers who either are careful about the water they use because they don't think we should waste water, or conscious of their use, were significantly more likely to accept both the uninformed plan (74%) and the informed plan (67%).



# Household Customer Emotions.

- A question around how customers are feeling was asked to gain more insight behind other response to the survey.
- The top-3 emotions for customers currently are being 'worried' (47%), 'tired' (32%) and 'stressed' (30%).
- There were no significant differences by regions, however, customers who are feeling 'positive' or 'happy' were significantly more likely to find the uninformed plan (positive) and informed plan (happy) acceptable, respectively. Customers feeling 'depressed' were significantly less likely to find the uninformed plan, informed plan and adaptive planning acceptable.



# Household Customer Emotions by Key Measures.

- As can be seen below, customer emotions had a significant impact on plan acceptability and perceptions of affordability.
- The most powerful positive emotion was feeling 'positive,' with acceptability of both the uninformed plan and adaptive planning significantly high amongst these customers. Feeling 'depressed' was the most powerful negative emotion with significantly low scores across all key measures.

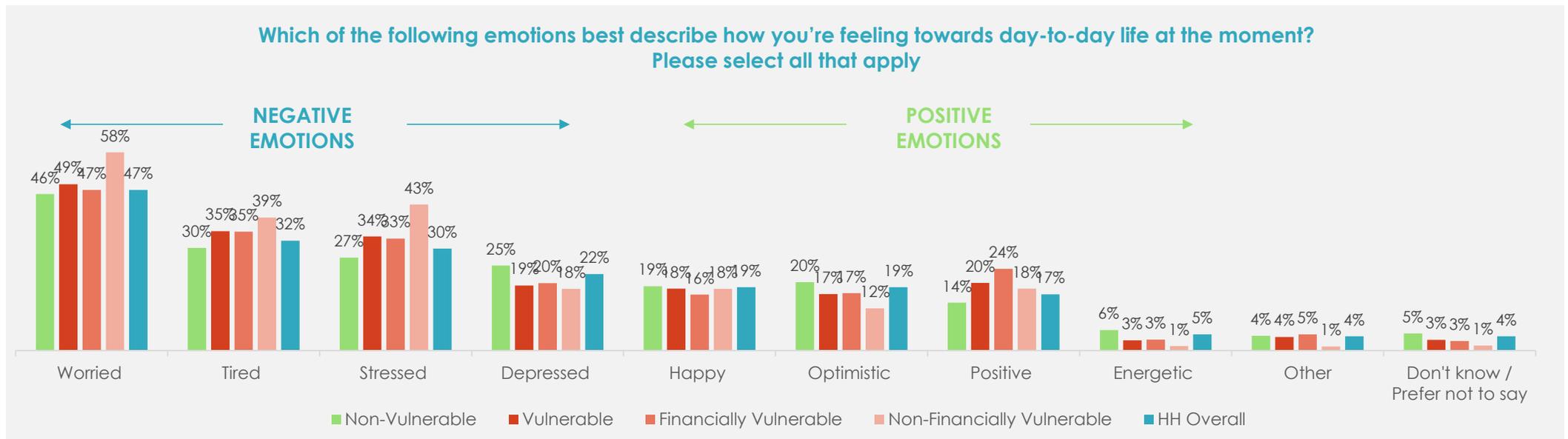
↑ ↓ Indicates significant difference by emotion

POSTIVE EMOTIONS		% Response	
		Unacceptable (%) / Unaffordable (%)	Acceptable (%) / Affordable (%)
Happy	Uninformed Plan	6%	78%
	Informed Plan	14%	75%
	Plan Affordability	19%	59%
	Adaptive Planning	5%	77%
Optimistic	Uninformed Plan	10%	76%
	Informed Plan	17%	74%
	Plan Affordability	19%	58%
	Adaptive Planning	9%	79%
Positive	Uninformed Plan	4%	86%
	Informed Plan	8% ↓	75%
	Plan Affordability	10% ↓	59%
	Adaptive Planning	4%	86%
Energetic	Uninformed Plan	13%	77%
	Informed Plan	14%	75%
	Plan Affordability	15%	67%
	Adaptive Planning	3%	78%

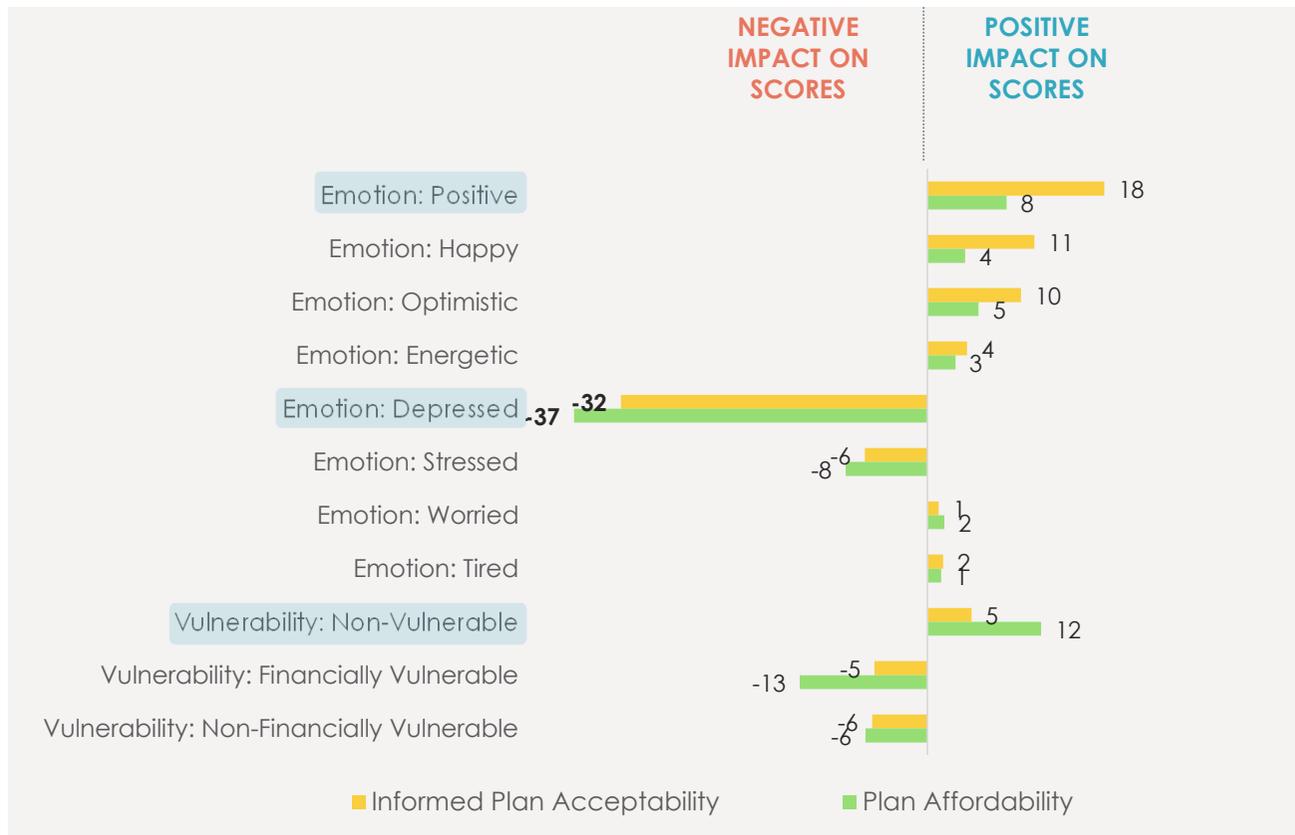
NEGATIVE EMOTIONS		% Response	
		Unacceptable (%) / Unaffordable (%)	Acceptable (%) / Affordable (%)
Depressed	Uninformed Plan	20% ↑	55% ↓
	Informed Plan	35% ↑	41% ↓
	Plan Affordability	49% ↑	25% ↓
	Adaptive Planning	20% ↑	47% ↓
Worried	Uninformed Plan	12%	69%
	Informed Plan	20%	60%
	Plan Affordability	26%	45%
	Adaptive Planning	9%	63%
Stressed	Uninformed Plan	14%	64%
	Informed Plan	24%	56%
	Plan Affordability	36% ↑	39%
	Adaptive Planning	11%	59%
Tired	Uninformed Plan	13%	67%
	Informed Plan	22%	58%
	Plan Affordability	30%	41%
	Adaptive Planning	9%	62%

# Household Customer Emotions by Vulnerability Status.

- Whilst Vulnerable customers did indicate feeling more negative (67% vs. 64%) and fewer positive emotions (39% vs. 49%), there were no significant differences between these customers and Non-Vulnerable customers.
- Non-Financially Vulnerable customers, i.e. customers with either a serious illness or registered disabled, were more likely to feel 'worried', 'tired' and 'stressed', although not significantly.
- Interestingly, Non-Vulnerable customers were more likely to cite feeling 'depressed' than any of the vulnerable groups. With this emotion the strongest emotional driver with regards to low plan acceptability and affordability scores, it suggests that it is customer emotions - feeling 'depressed' in particular - that drive plan acceptability more so than vulnerability status.



# Emotions and Vulnerability Driver Analysis



- The key driver analysis was used to help understand what level of impact each emotion and vulnerability status had on informed plan acceptability (the results were similar for uninformed plan acceptability) and plan affordability. It should be noted that R-squared values for both models were relatively low meaning that, as we would expect, there are other strong factors beyond emotions and vulnerability status driving plan acceptability and affordability.
- Relative importance analysis produce figures which sum to 100 (ignoring negatives) which effectively give a % impact for each variable on the outcome variable within the set. The higher the figure, the more impact the variable has on overall perception
- As can be seen from the chart, feeling 'depressed' had a significant negative impact on both informed plan acceptability and affordability. For both metrics, the impact is significantly more than vulnerability status.
- Unsurprisingly, being financially vulnerable has more of a negative impact on plan affordability than plan acceptability. Similarly, being Non-Vulnerable has more of a positive impact on plan affordability than plan acceptability where positive emotions have more of an impact.

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Appendix.

## Links to Supporting Documents.

<b>Cognitive Testing Summary</b>	<a href="https://turquoisethinking.sharefile.com/d-sb90fd8e5065c4dfe83ebd67312855448">https://turquoisethinking.sharefile.com/d-sb90fd8e5065c4dfe83ebd67312855448</a>
<b>Household Customer Questionnaire</b>	<a href="https://turquoisethinking.sharefile.com/d-sdfc3de8de0934f319f51e5be57189693">https://turquoisethinking.sharefile.com/d-sdfc3de8de0934f319f51e5be57189693</a>
<b>Non-Household Customer Questionnaire</b>	<a href="https://turquoisethinking.sharefile.com/d-s7a55948d84e640bfb952c23076d48bbc">https://turquoisethinking.sharefile.com/d-s7a55948d84e640bfb952c23076d48bbc</a>
<b>Household Customer Stimulus Slides</b>	<a href="https://turquoisethinking.sharefile.com/d-s66e951aa4d37452787a83294c0a3203d">https://turquoisethinking.sharefile.com/d-s66e951aa4d37452787a83294c0a3203d</a>
<b>Non-Household Customer Stimulus Slides</b>	<a href="https://turquoisethinking.sharefile.com/d-sdbdabaaef8174105ba88c10c9eb26b44">https://turquoisethinking.sharefile.com/d-sdbdabaaef8174105ba88c10c9eb26b44</a>
<b>Stimulus Videos</b>	<a href="https://turquoisethinking.sharefile.com/d-sa8fd5d75070740daa09c66a54db1f179">https://turquoisethinking.sharefile.com/d-sa8fd5d75070740daa09c66a54db1f179</a>

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